Logix User Manual: CPE Offer Builder

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NCR Advanced Marketing Solution
2651 Satellite Blvd NW,
Duluth, GA 30096
United States of America
1-800-225-562 / fax 404-479-1175

www.ncr.com

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Preface

This document is a supplement to the main *Logix User Manual*. It describes how to create and manage offers for NCR's Copient Promotion Engine (CPE) using Logix, the web-based interface to NCR's Advanced Marketing Solution (AMS). The CPE supports sophisticated offer configurations using a range of condition and reward criteria, and is most frequently used in non-NCR environments. For additional information about AMS, visit

http://www.ncr.com/products/gm/marketing/advanced-marketing-solution

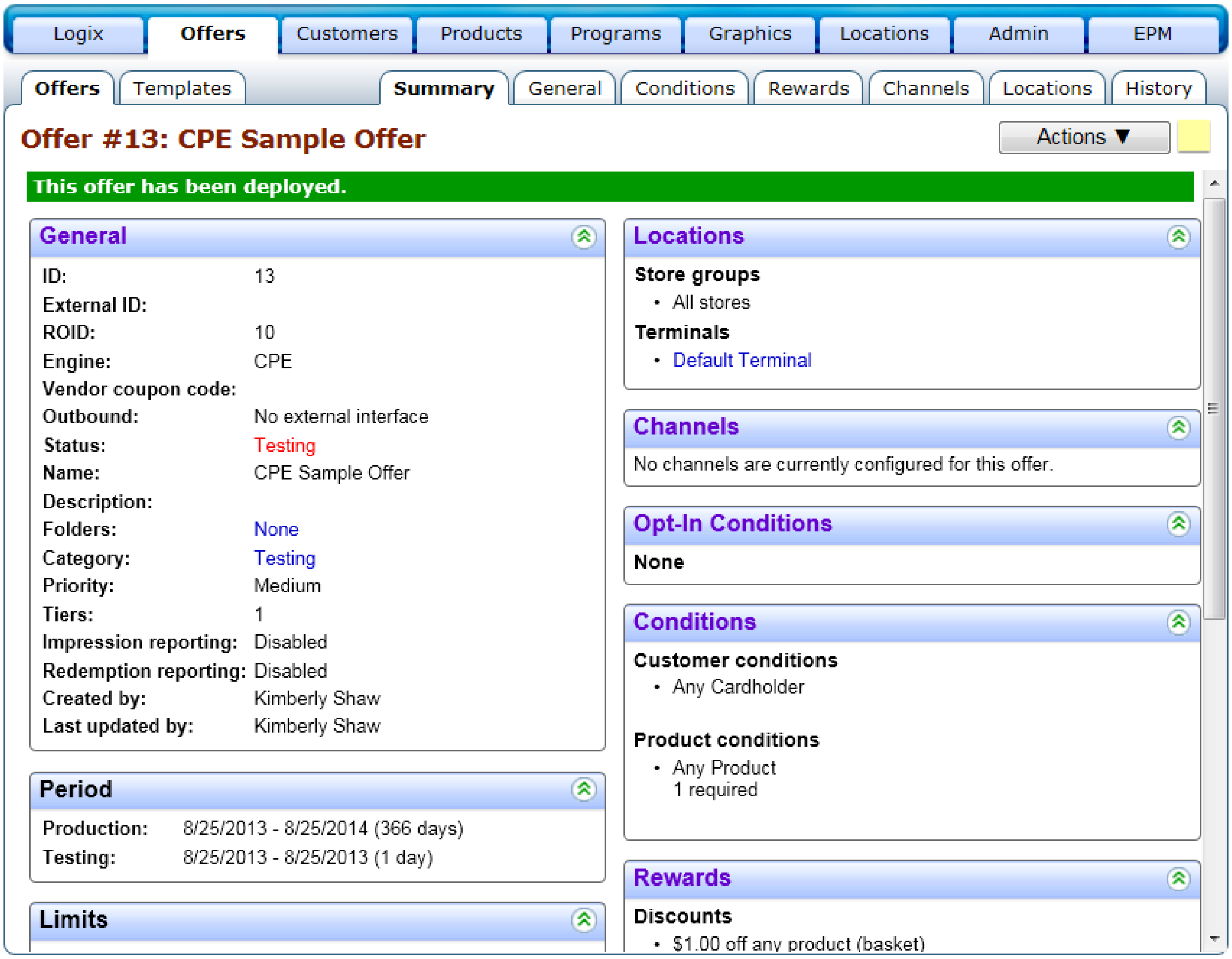
Each CPE offer is broadly divided into seven sections, *Summary*, *General*, *Conditions*, *Rewards*, *Channels, Locations* and *History*, each one accessible using the subtabs in the CPE offer builder. Each section has a corresponding chapter in this document.

For an introduction to using offer builders in Logix, please see chapter 16 ("Offers") in the *Logix User Manual*.

Contents

1 Summary

Whenever you visit a CPE offer in Logix, the *Offers>Summary* page is the first thing you'll see. The page collects various data from each of the subsequent pages (*General*, *Opt-In Conditions*, *Conditions*, *Rewards*, *Channels*, *Locations* and *History*) and condenses it into a single-page thumbnail that's easy to scan and absorb. These data cannot be edited from the summary page, however – you must go into each individual page to make changes.



The large rust-colored title text near the top of the page shows the offer's Logix-assigned ID and its name. The bar just below this title indicates the current status of the offer, which may be scheduled, testing, development, active, or expired; see chapter 16 ("Offers") in the main *Logix User Manual* for details.

Depending on your permissions, the summary page may also include one or more controls within the "Actions" dropdown menu near the upper right corner of the page, each described in the Actions section of this chapter.

Boxes within the body of the page summarize data editable from other pages in the offer builder, with the exception of the "Deployment" and "Validation report" boxes: "Deployment" summarizes the results of offer deployment and shows when it was last attempted, when it was last successful and what the latest status was. Also when an offer is deployed, the "Validation report" box will indicate the results of the deployment, both for the offer itself and for its various components (such as product or customer groups). The results are determined by comparing the times on the local and central servers. Valid locations are those for which the times match;

watch locations are those for which the times do not match, but the difference is within the defined grace period; warning locations are those that do not match and the difference exceeds the grace period.

1.1 Actions

1.1.1 Assign folders

Much like files on a computer, offers can be organized into folders as an aid to finding and maintaining sets of offers. The "Assign folders" action opens a popup from which you can select the folders into which the offer is placed. Note that an offer needn't be in any folder, or can be in multiple folders simultaneously. See chapter 16 of the *Logix User Manual* for information about folder setup and maintenance.

1.1.2 Copy offer

This action creates a copy of the current offer. The new offer is identical to the original, except that the phrase "Copy of" is prepended to the name.

1.1.3 Delete

To delete an offer, first ensure that it's not in use and no longer needed, then click Delete. A dialogue box will appear asking you to verify that you want to delete the offer; click Yes if you're certain.

1.1.4 Deploy

"Deploying" an offer tells the system that setup is complete and the offer is ready for use. When an offer is marked as deployed, it will be placed into an "awaiting deployment" state until the next scheduled run of the automated agent responsible for deploying the offer. Once processed by the agent, the offer will be deployed and will remain in that status until either modified or expiring.

1.1.5 Defer deployment

Deferred deployment is the same as a regular deployment, but doesn't happen immediately. Instead, deployment is deferred for a configurable length of time (one day by default). The time of day when this deferred deployment occurs is controlled by system option #51 ("Deferred deployment time").

1.1.6 Export

Offer data can be exported from Logix into an XML file, itself contained in a GZip. To do this, click the Export button and you'll be prompted to specify the path where the file should be saved.

1.1.7 Export to archive

This action becomes available if the "Export to archive" option is selected on the *Offer>General* page. It saves a copy of the offer (as XML in a GZip) to the specified path in the enterprise data warehouse. Note that when an export path is set in *Admin>Settings*, Logix will also automatically export the offer to the archive whenever the offer is successfully deployed or when the offer expires.

1.1.8 Save as template

If you expect you'll need to make more offers like the one you're working on, you can save it as an offer template. By using the template, you'll avoid having to repeatedly reenter the same data when creating other offers. See chapter 17 of the *Logix User Manual* for more about offer templates.

1.1.9 Send outbound

If an offer is associated to a CRM engine, this action will send the offer data to the selected engine.

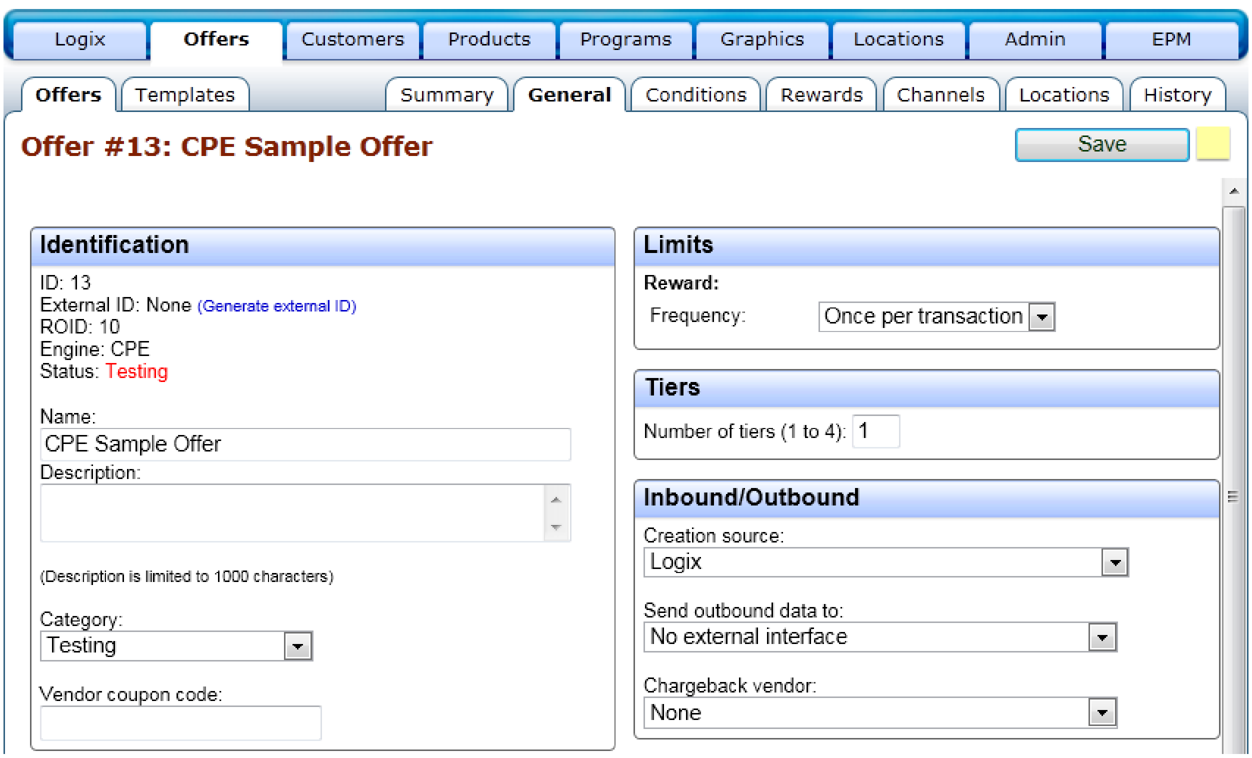
2 General

The following aspects of a CPE offer are set and controlled from the *General* page:

- **Name** – Limited to 50 characters, the name should be both descriptive and as brief as possible.
- **Description** – This optional field can hold details about the nature of the offer, its purpose, etc.
- **Category** – The category is an arbitrary classification used for organizing offers. Categories are created and controlled from within the Administration section.
- **Vendor coupon code** – This field allows you to specify if the offer is associated with a particular coupon by entering a code of up to 20 characters.
- **Priority** – Priority determines which offers will be displayed first in a transaction. The available priorities are Low, Medium or High.
- **Production period** – Production is the period when the offer is publicly available to its target customers. The production dates entered here must be in the format MM/DD/YYYY (month/day/year). Click the icon next to the input box to pick a date from a calendar.
- **Limits** – Limits control the frequency at which the offer is made available. For instance, you may want an offer to be available once per transaction, once per day, 3 times every 7 days, etc. For both eligibility and reward, select a frequency or select "Custom" to enter your own frequency. Note that you can set limits that span multiple days, but not multiple transactions.
    - **Once per transaction** –is computed once per single POS transaction
    - **Specified number of days** – there is a promotional variable which is updated at the end of a POS transaction for a cardholder
    - **Once per offer** – a promotional variable is updated at the end of a POS transaction for this customer or household and is never reset
    - **Custom** – eligibility can be defined by limit, period based on hours since last award or days since last incentive. Configuring a custom limit as hourly with a value of 1 hour is interpreted as a once per transaction limit. The smallest hourly limit period that can be used is 2.
- **Testing period** – This is the period during which the offer is active in testing locations.
- **Tiers** – A tiered offer is one that allows multiple "levels" of condition and reward, each with its own unique values. (For instance, spend $2 and get x, but spend $3 and get y.) You can select whether the offer is tiered and, if so, how many tiers it should contain. NCR recommends three to four tiers as the practical limit.
- **Inbound/outbound** – The inbound/outbound box indicates where the offer originated and where outbound data from the offer will be sent. For instance, an offer generated in Logix will say "Creation source: Logix", and may be configured to send data to Teradata CRM. This box also includes a selector that allows you to specify the vendor against which this offer should be charged. Vendors appearing in this list are configured in the Administration section of Logix.
- **Employee filtering** – Enabling employee filtering will cause the offer to be available only to employees or only to non-employees. The determination of whether or not a customer is an employee is based on information from the customer's account.
- **Advanced options**
    - **Defer evaluation until end of sale** – Ticking this checkbox causes the offer not to be applied until the end of a transaction.

- **Enable reporting** – Ticking the impression reporting and redemption reporting checkboxes tells Logix to collect and maintain performance information about the offer for the purposes of generating reports. The impression data is based on how many times a customer was presented with an offer, while redemption data is based on the customer taking advantage of the offer. If reporting is enabled, you can link to the offer's reports from the "General" box on the Offer>Summary page.
- **Export to archive** – Ticking this checkbox enables the "Export to archive" option on the *Offers>Summary* page.
- **Enable issuance** – Logix can be configured to record issuance data, which consists of detailed information about each reward issued to customers during transactions. Ticking the "enable issuance" checkbox enables the generation of issuance reports for this offers' deliverables. Clicking the "I" symbol next to this option will display the active deliverable types.
- **Treat as manufacturer coupon** – When ticked, this tells the system to treat the offer as a manufacturer coupon which exempts it from the processing normally accorded to regular discount offers, including best deal calculation, etc.
- **Favorites** – The "Favorite for all users" button allows you with a single click to mark the offer as a favorite for all Logix users. (When marked as a favorite, the offer will appear preferentially in the offers list in customer inquiry.) If you want to mark the offer as a favorite for only a certain set of users, click the user symbol to launch the *Offers>Favorites* popup.

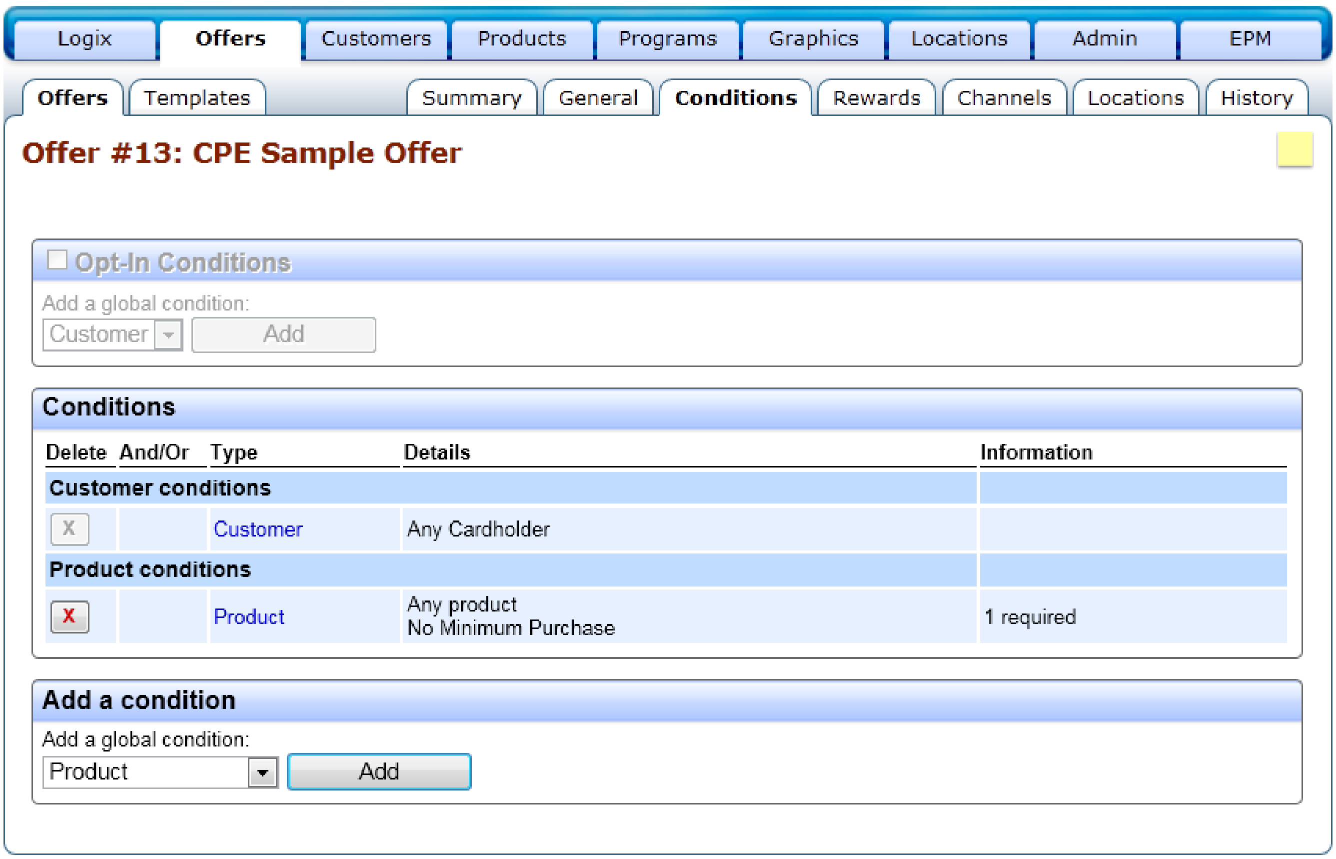
- **Banners** – The banners area has checkboxes for each banner to which the offer can be assigned, as well as a checkbox that assigns the offer to all banners.



3 Conditions

Offers rely on conditions to determine when to give rewards. For instance, an offer that rewards a customer with 10% off their basket may be conditional on a customer from a particular group first buying 10 private label items. Offers can be controlled by several separate types of conditions: customer, product, points, stored value, time, day, instant win, trigger codes and attributes. Each one is fully described later in this section.

The *Offers>Conditions* page lists the conditions currently included in the offer.



3.1 Create

To create a condition, select one of the types from the "Add a condition" dropdown and click Add. A popup will appear which will allow you to define the condition's characteristics. When you're finished editing the condition, click Save.

Note that some condition types can appear only once within an offer – customers, points, stored value, day, time and instant win. Others can appear multiple times – products, product disqualifiers, tenders, trigger codes and attributes.

3.2 And/Or

When multiple product or attribute conditions are present within the same offer, they're joined by a Boolean relationship (that is, an "and" or "or") which controls the manner in which Logix considers these conditions to be met.

For instance: An offer might have two product conditions, one that requires an item from Group A and another that requires an item from Group B. If they're linked by an "and", then both of them must be met for the offer to take effect – in other words, anyone receiving the offer must purchase an item from Group A and one from Group B. However, if the conditions were linked by an "or", then either condition could be met – in other words, buying a Group A item *or* a Group B item would qualify the customer.

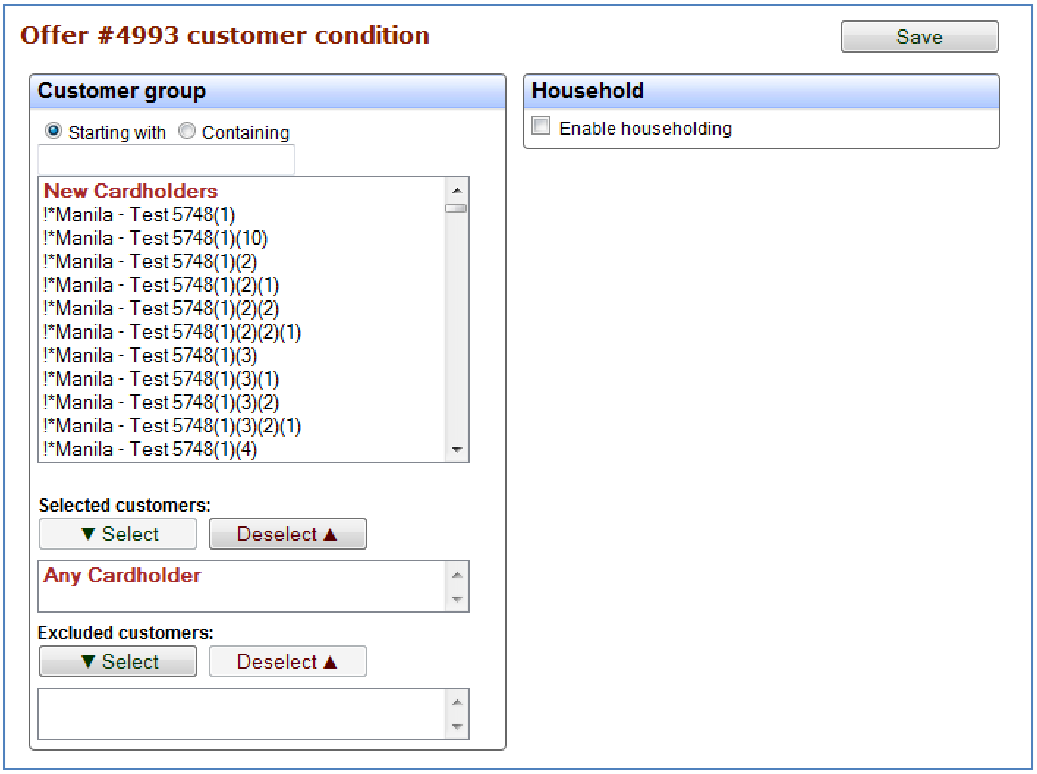
By default, Logix links these multiple conditions with the "and" relationship, meaning that they all must be met. Clicking an "and" will change it to an "or".

3.3 Delete

To delete a condition, click the "X" button next to its name in the list.

4 Customer conditions

Customer conditions control who will be eligible to receive the offer. To create a customer condition, select from the list of available groups the one that you want to be the condition (for example, Top Decile Customers). Alternatively, you can select "Any Cardholder", then select a group to exclude. For example, excluding Group X from Any Cardholder makes the offer eligible to everyone except members of Group X.



4.1 Customer group

Please be aware of the following when selecting customer groups for a customer condition:

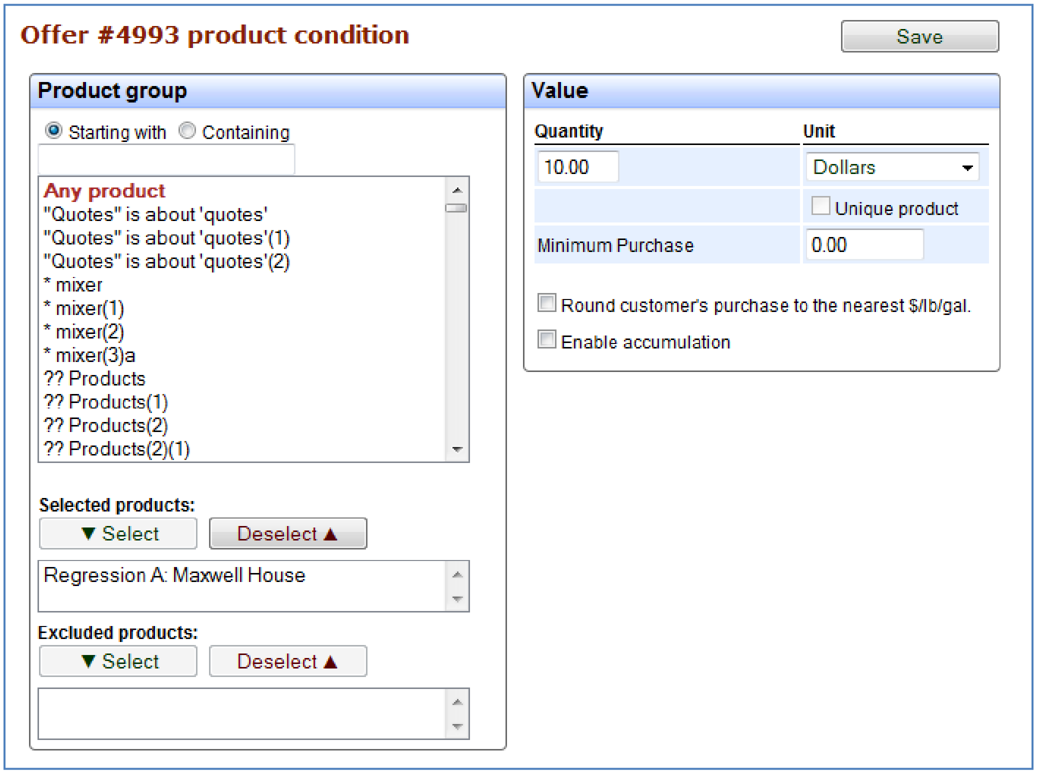
- "Any Cardholders" is a special customer group that represents all customers who have customer IDs or household IDs. With the exception of "New Cardholders", any other customer group can be excluded from it.
- "New Cardholders" is a special group that represents all customers who have customer IDs but do not yet have customer records. You can select this group, but nothing can be excluded from it.
- As for normal, user-made groups, you can select any of them in any combination or quantity. If you select more than one, Logix will consider the groups to be linked by an "or" Boolean condition. In other words, if you select two groups, A and B, Logix will interpret that to mean that a customer needs to be either in group A or in group B in order to meet the condition.

4.2 Householding

Ticking the householding checkbox indicates that IDs grouped within a household (say, IDs of spouses) will be included in the customer group.

5 Product conditions

Product conditions are met when certain items are purchased. For instance, the condition of buying milk might trigger a discount on cereal.



5.1 Product group

To create a product condition, you first must select from the list of available groups the one that you want to be the condition (for example, Paper Products).

5.2 Value

In the quantity box, input the value necessary to satisfy the condition and select the type of value that it is. For instance, if the condition is $20 of paper products, the value type will be an amount (dollars). If it's two pounds of meat, the value type will be weight (pounds).

Ticking the “unique product” checkbox indicates that each item that the customer purchases toward meeting the condition must be different. For instance, if 10 items from a group are required and box is ticked, and the customer purchases 10 of the same item, the condition will not be met.

If you want customers to be able to acquire the selected products as part of an ongoing accumulation, you can enter the minimum amount to be accumulated, the limit that can be accumulated, and the period over which the accumulation can occur.

5.3 Advanced options

The first advanced option that may be available relates to rounding and appears in the UI if hidden CPE system option 89 (“Enable product condition rounding”) is enabled. Ticking the box will cause the customer’s purchase to be rounded to the nearest dollar for the purposes of determining if the condition is met. If the condition requires the customer to buy a certain weight or volume of items, the purchase will be rounded to the nearest pound or gallon.

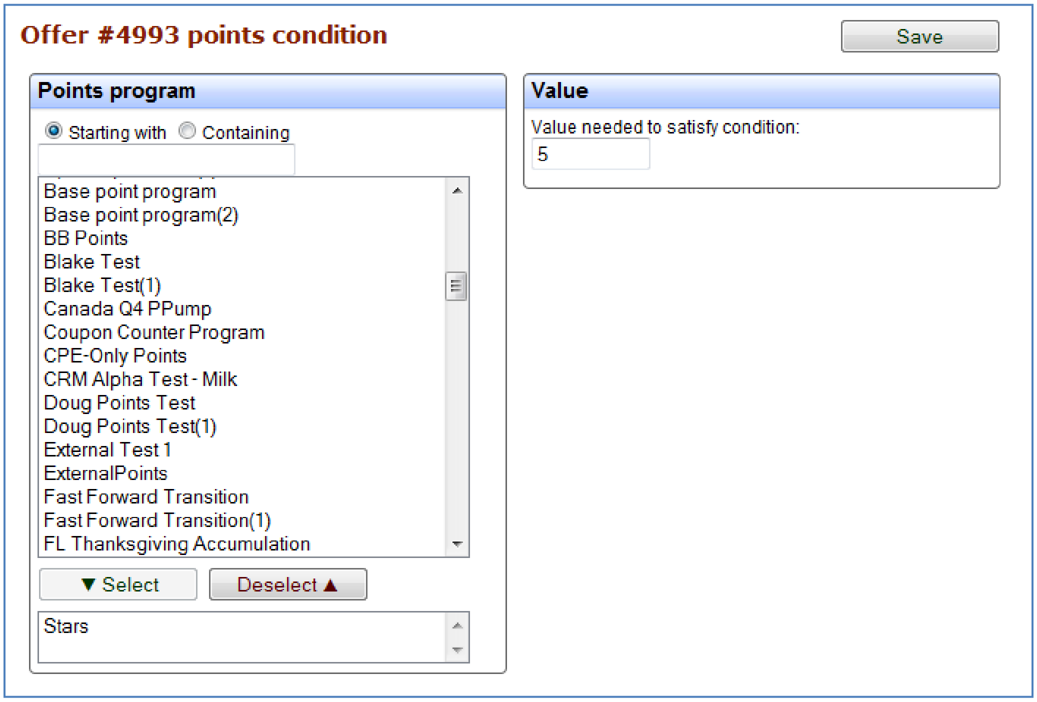
The second checkbox enables accumulation, which allows the customer to work towards meeting the condition over multiple transactions. If the checkbox is ticked, you can set the minimum amount that must be purchased each time and the limit that can be purchased over a specified period.

5.4 Product disqualifiers

A product disqualifier condition, technically a separate condition type of its own, is similar to regular product conditions but operates in the opposite manner. Where a regular condition specifies what a customer must purchase to meet the condition, a disqualifier instead specifies products that when purchased will cause the customer to be ineligible for the offer.

6 Points conditions

A points condition triggers an offer when a customer accumulates a certain number of points in a particular program.



6.1 Points program

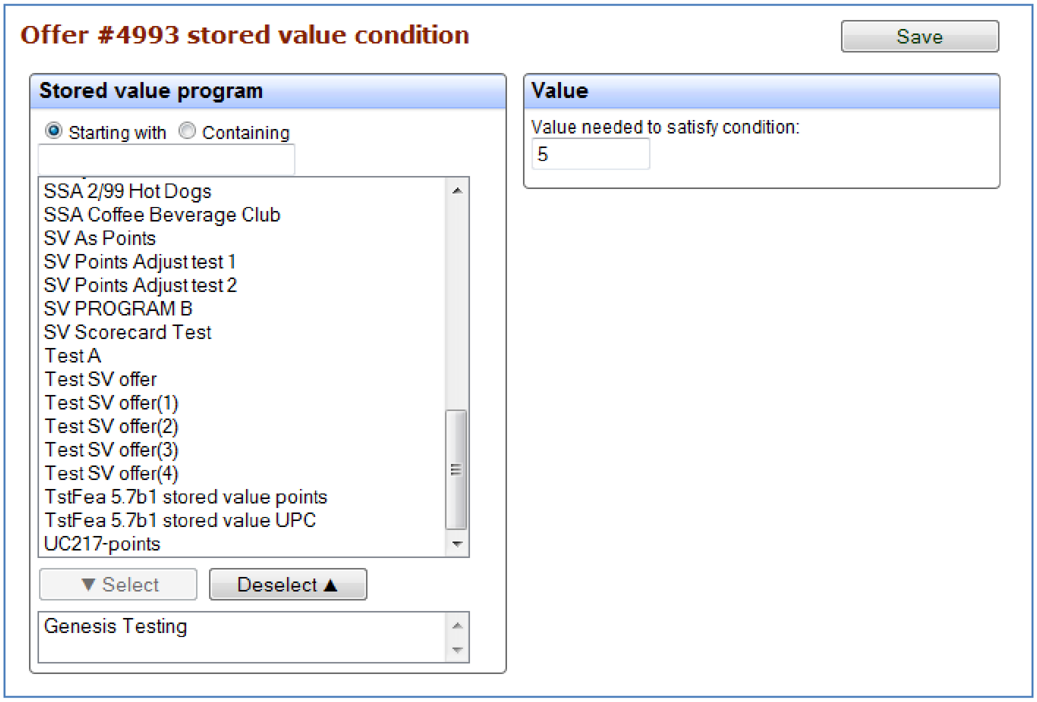
Select the appropriate points program from the list.

6.2 Value

Input the quantity of points that must be accumulated in order for the condition to be met.

7 Stored value conditions

A stored value condition triggers an offer when a customer accumulates a certain number of stored value units in a particular program.



7.1 Stored value program

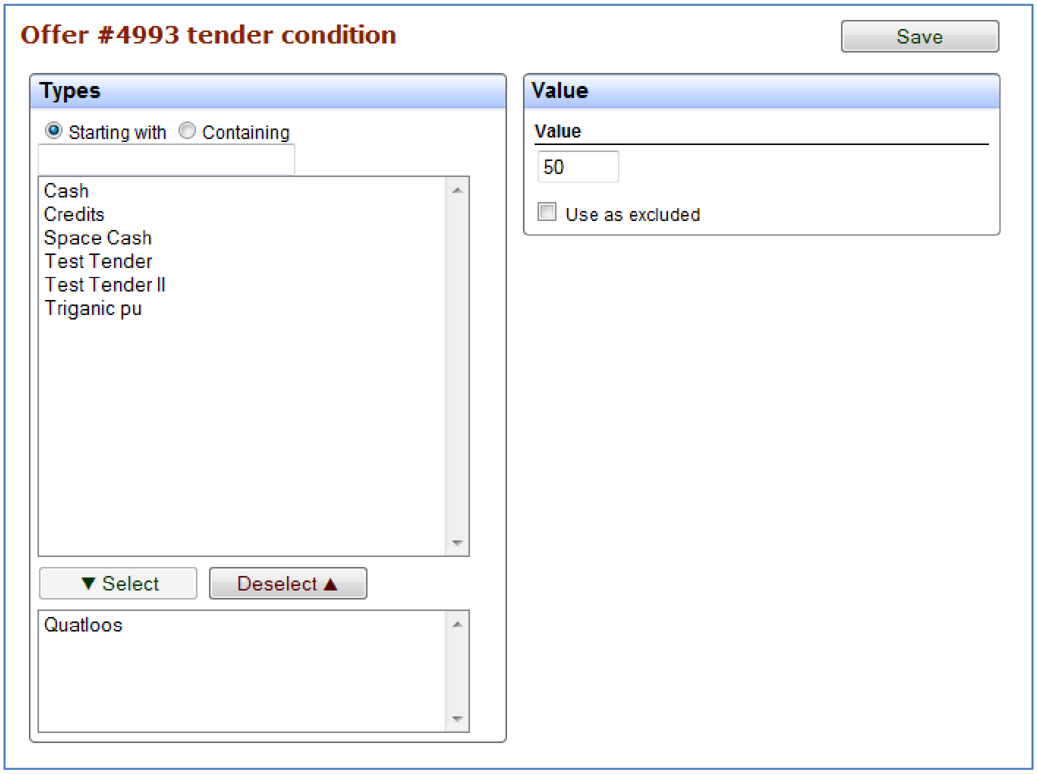
Select the appropriate stored value program from the list.

7.2 General

Input the quantity of stored value units that must be accumulated in order for the condition to be met.

8 Tender conditions

A tender condition is met when a customer pays for items using certain types of tender, such as check, MasterCard, etc., or a certain amount of cash ($10, $25, etc.).



8.1 Types

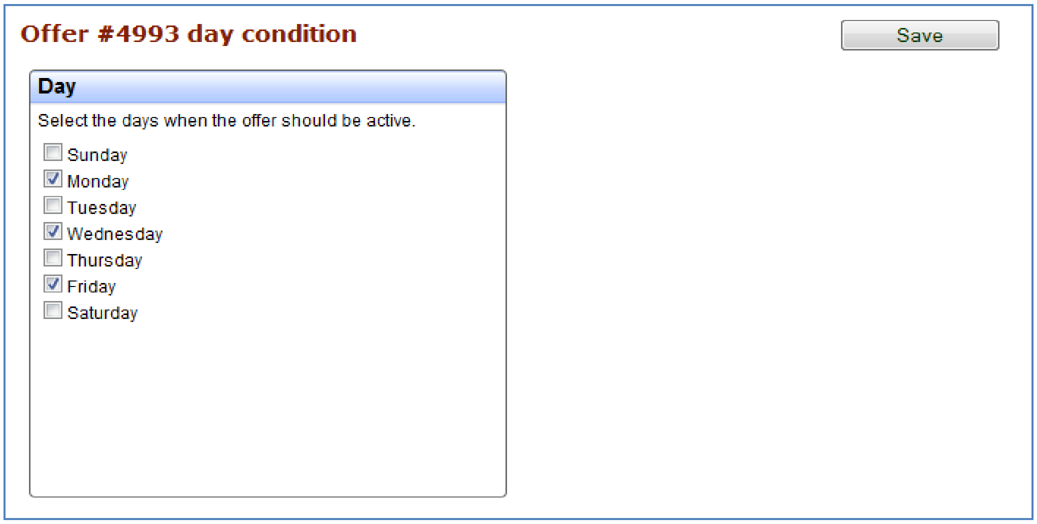
To set a tender type condition, select a tender type from the list. The type you select will appear on the right in the Value area. Tender types can be managed from the *Admin>Configuration>Tender types* screen.

8.2 Value

To set a value for the selected type that must be met to satisfy the condition, enter it into the appropriate value box. To indicate that the condition should allow all forms of tender except for those selected, tick the "use as excluded" checkbox. When you've finished, click Save.

9 Day conditions

A day condition controls when the days of the week during which an offer is available. When you've finished setting the day conditions, click Save. To set a day-based condition, check the boxes next to the days of the week on which the offer should be available.



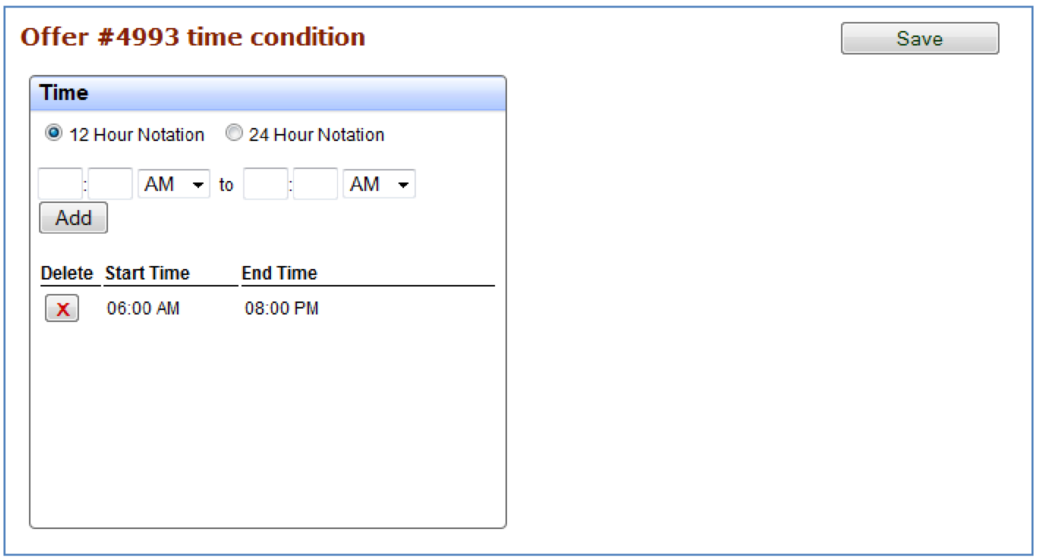
10 Time conditions

A time condition sets the time(s) of day during which an offer will be active. For instance, a time condition could allow an offer to run during morning and evening rush hours but not in between.

To set a time condition, first enter a start time and an end time into the boxes provided, then click the “Add” button to add it. The time slot you defined will then appear below, along with a button marked with an X which allows you to delete it. You can add as many time slots to the condition as you wish.

Note that all time slots must be contained within a single day. In other words, a condition of 11PM to 2AM cannot be created; it would have to be two conditions, one from 11PM to midnight and the other from midnight to 2AM.

Times can be entered with either 12 Hour or 24 Hour Notation; however, the time condition will always be displayed in 24 Hour Notation on the *Offers>Conditions* page.



11 Instant win conditions

11.1 Instant win

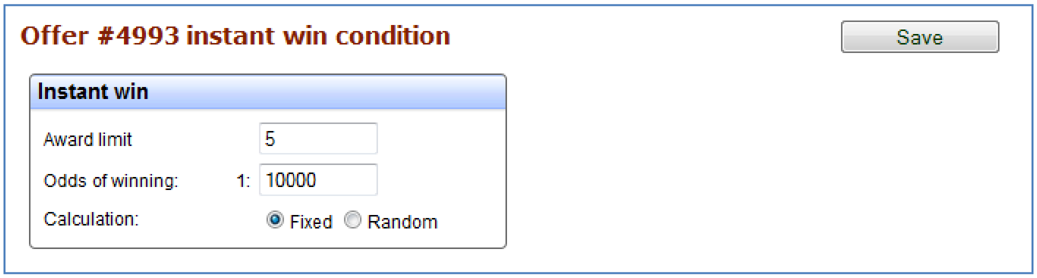
An instant win condition gives customers a random chance of being able to redeem an offer, a chance determined by the values set in the condition popup.

Award limit: This field indicates the number of times the system will allow the offer to be won per store. Once this number is reached at a store, customers will no longer be able to redeem the offer.

Odds of winning: The odds here are expressed as 1:*x*. Odds of 1:100 mean that one customer out of every 100 will pass the condition.

Calculation: Logix supports two different means of calculating whether any given customer will meet the condition:

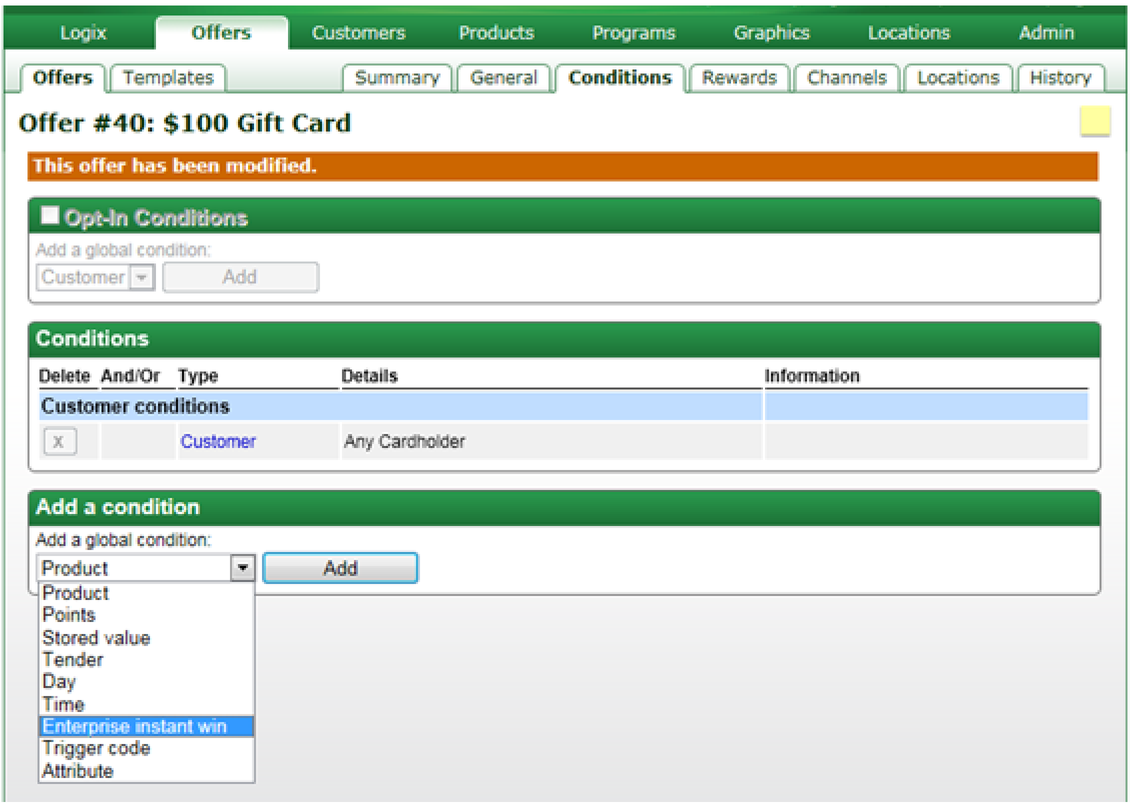
- Fixed calculation means that, given odds of 1:100, every hundredth customer will meet the condition.
- Random calculation with the same odds means that one customer out of every 100 will meet the condition, but which is determined randomly.



11.2 Enterprise instant win

Enterprise instant win (EIW) conditions differ from regular ones in that chances to win a given reward can be spread across customers throughout the enterprise, rather than being calculated on a per store basis. EIW conditions also use pre-calculated win times (referred to in Logix as "trigger times") to determine when prizes will be awarded.

EIW conditions are available in CPE offers of the Instant Win subtype. This condition subtype appears only once within an offer.



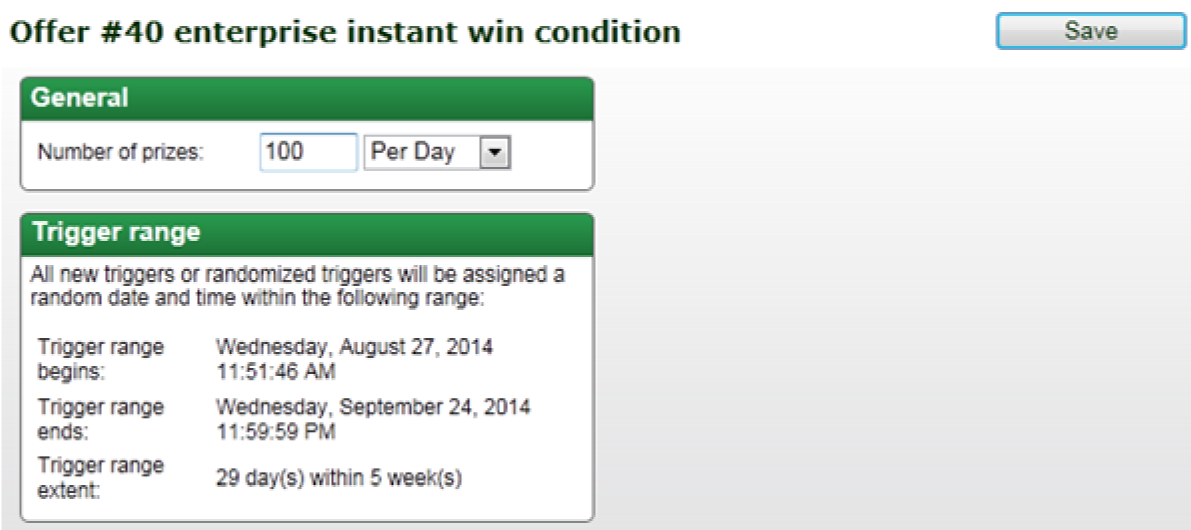
Creation

To create an EIW condition, first specify the desired number of prizes. This is the number of times overall that the offer's rewards will be granted. For instance, if you enter 10 per week, and the offer runs for three weeks, then the offer will grant its reward 30 times. The number of prizes can be applied:

- Per offer: The number of rewards *randomly* granted over the trigger range.
- Per day: The number of rewards granted *per day* over the trigger range.
- Per week: The number of rewards granted *per week* over the trigger range.

A trigger range is also specified when creating the EIW condition, but is not editable. The trigger range is the period over which trigger times should be generated. By default, the range will begin at the same time that the offer begins (i.e., the beginning of the starting day); if this has already passed, then the trigger range will begin one hour in the future. The range ends at the end of the last day of the offer. Note: Time-of-day and day-of-week conditions may limit the times during which triggers can be generated, and if present will be noted in the "trigger range" box.

Once the number of prizes is set, click "Save" and Logix will create the condition and generate the requisite number of triggers over the trigger range. For security, the dates and times of these triggers are not displayed.

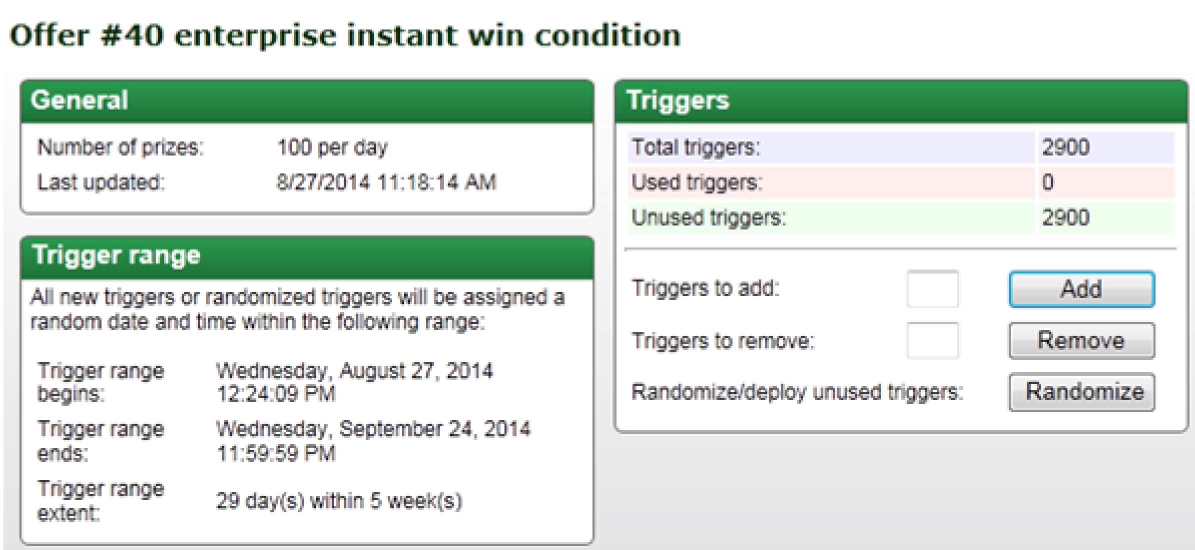


Import

Triggers automatically generate on imported offers with an EIW condition based on the frequency (number of prizes per offer, per day, or per week) and the trigger range (start and end dates).

Editing

Once created, the EIW condition will show the total number of triggers generated for the condition, the number (if any) that have been used, and the number that remain unused. It will also grant you the ability to manipulate the triggers in the following ways: Add, Remove, Randomize.



- Add: You can add a number of triggers by entering a quantity into the input box and clicking “Add”. Newly-added triggers will generate at *random* times over the current trigger range. Note: The triggers will no longer generate the specified number of prizes per day or per week if additional triggers are added.
- Remove: Triggers can be removed from an EIW condition by entering a quantity into the input box and clicking “Remove”. The triggers that are removed are chosen *randomly* from the remaining triggers. Note: The triggers will no longer generate the specified number of prizes per day or per week if triggers are removed.
- Randomize: In case of a security breach, this option allows you to re-randomize the dates and times of the *remaining* EIW’s triggers based on the current trigger range. Note: Altering the offer's production dates will cause any triggers on its enterprise instant win condition to be re-randomized.

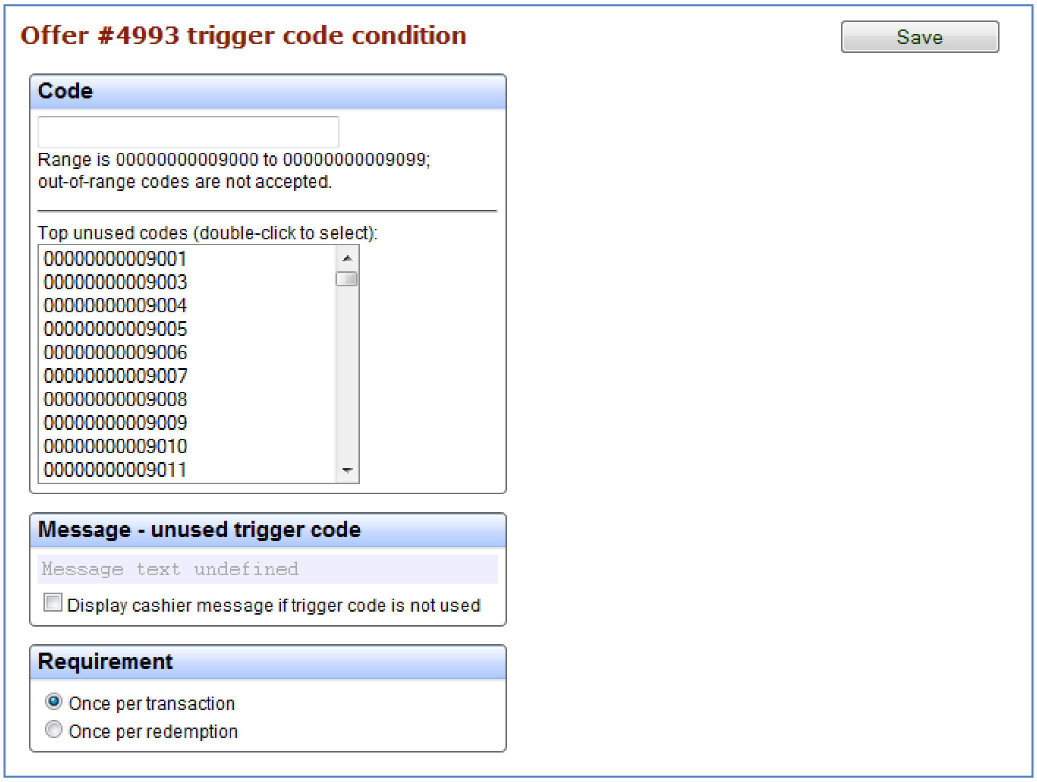
CPE Instant Win Log:
In installations using enterprise instant win, the CPE Instant Win Log records activity relating to the use of EIW triggers. You can reach this file via the "Logs" button at the top of the *Admin>Store Health* page, or via the "View Log" link at the bottom of the application summary.

Enterprise Instant Win Report:
Access instant win reports to view a summary of enterprise instant win conditions and their associated triggers. This summary is accessible via the “Instant Win” button from the *Admin>Reports* page.

Permissions that control access:
Access instant win offers – See (but not modify) CPE offers of the Enterprise Instant Win engine subtype.
Edit instant win offers – Create, delete and modify Enterprise Instant Win offers.

12 Trigger code conditions

Trigger code conditions require a particular code, represented by a UPC, to be scanned during a transaction in order to meet the condition. They also serve a second purpose by informing the cashier if the code is scanned but the other associated conditions are not met; in this case the cashier is normally told in the message to return the unused coupon to the customer.



12.1 Code

This is the UPC of the required code. Depending on how options are set in *Admin>Configuration>CPE System Settings*, this code may need to be within a particular numeric range, and may need to be unique (i.e., not used in any other offer).

To put in a code, enter it into the input box, either with or without zero-padding. (If without, Logix will automatically save the code with appropriate padding.) You can also select a code from the list, which shows the top 100 unused codes in the defined range.

12.2 Message

This is a cashier message that will be delivered when the code is used, or when the code is scanned but other conditions aren't all met. The message cannot be edited from this page, but instead is set for the entire system in *Admin>Configuration>Trigger codes*. You can, however, control whether the message will be presented by ticking the "display cashier message" checkbox.

12.3 Requirement

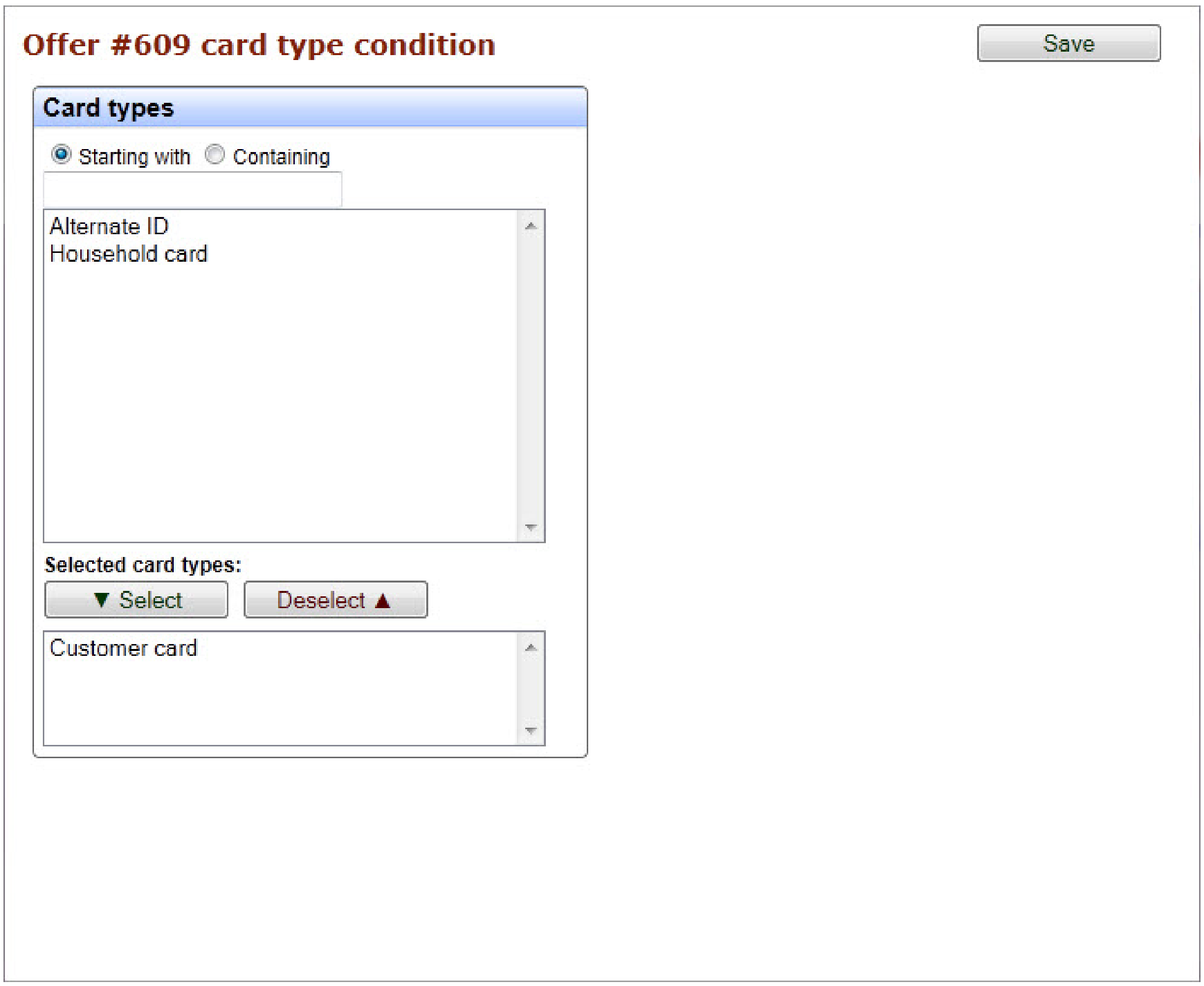
This determines if the code is required to be presented once per transaction or for each redemption of the offer.

13 Card type conditions

A card type condition requires that a particular kind of card (e.g., customer, household, etc.) be presented for the customer to be eligible for the offer. More than one card type can be selected for the condition, in which case the card types are considered to be "or'ed" together. For instance, if both customer and household types were added to the condition, the condition would be met if the customer presented either a customer card *or* a household card.

To create a card type condition, select it from the new condition dropdown on the *Offer>Conditions* page, then select the desired type(s) and click the save button. Only one card type condition may be added to an offer.

<u>Note:</u> Card type conditions are not compatible with customer conditions targeted to "any customer".

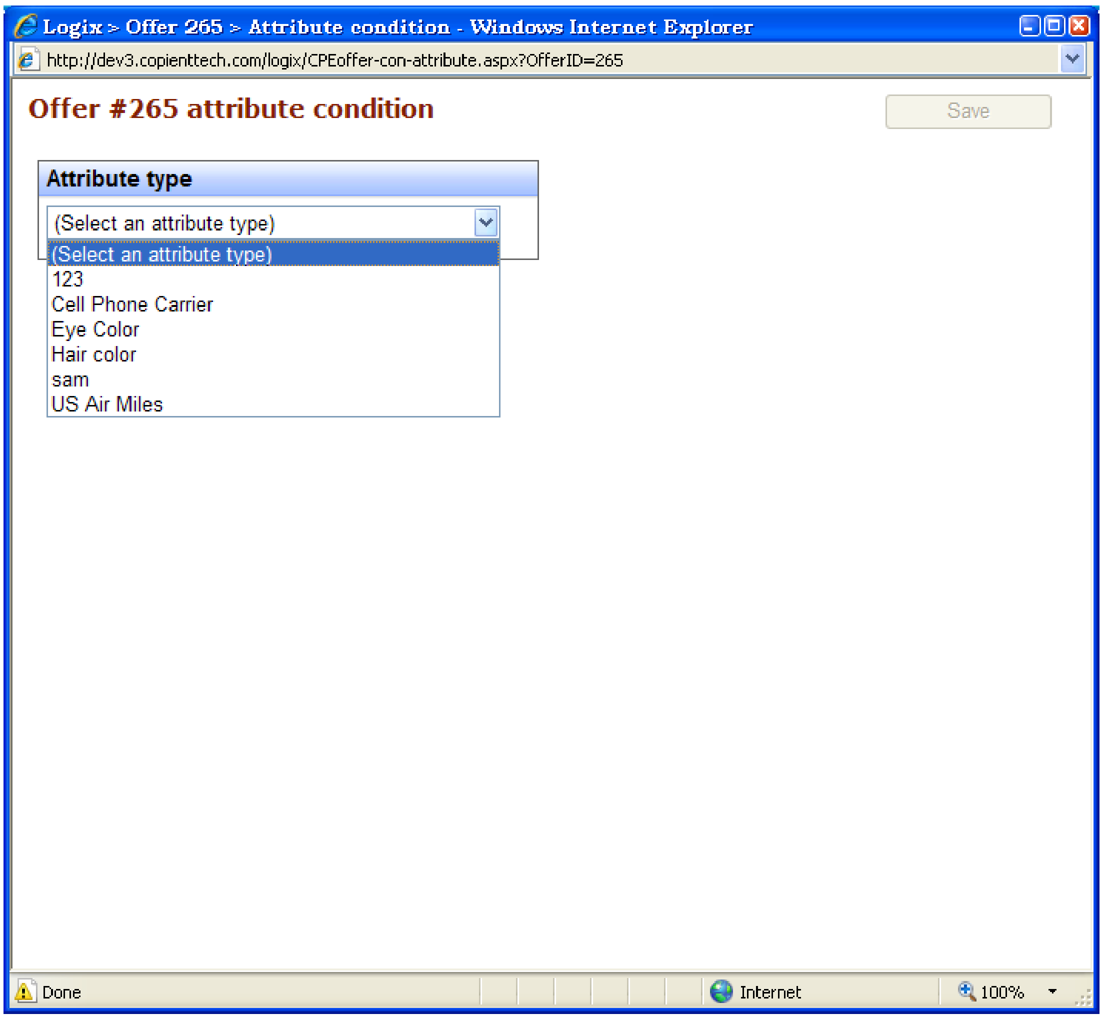


14 Attribute

An attribute is a characteristic that allows for grouping of like-customers who share that attribute. When a customer is assigned a specific attribute described in the attribute condition, the condition is met. Some examples of attributes are an Air miles program, deciles ranking, or a customer communication preference. Attributes are maintained in the *Admin>Configuration>Attributes* page of Logix.

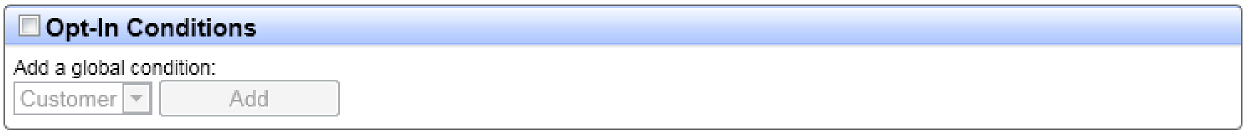
Attributes are assigned to customers through use of either the Customer Update Agent or the Customer Update web service.

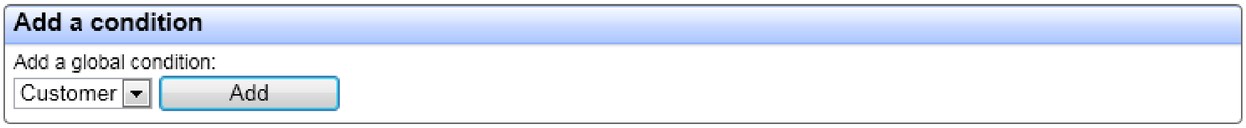
To create an attribute condition, select it from the new condition dropdown on the *Offer>Conditions* page, then select the desired type(s) and click the save button. Multiple attribute condition may be added to an offer.



15 Opt-In Conditions

Opt-In conditions control who will be eligible to opt-in and opt-out of an offer shown on an external customer touch point such as a Retailer's website. To create an Opt-in condition, select the Opt-In Conditions checkbox. Once the checkbox has been selected, the Global Condition drop down will be enabled and will display the Customer Opt-in condition which is required before adding any additional Opt-in Conditions.

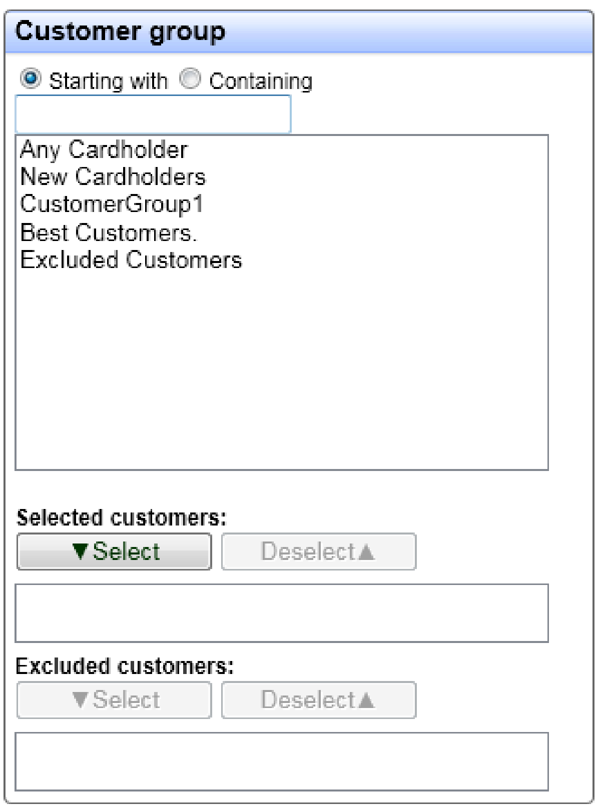




15.1 Opt-in

15.1.1 Customer

Choosing "Customer" for the Opt-in Condition will prompt the user to choose an Eligibility Customer Group. This will allow the customers included in the selected Customer Group to be eligible to view and opt into the offer.



Once the Eligibility Customer Condition has been created, a new Customer Condition will be created with a Default Customer Group name ("Offer Name" + Opt-in + Group). Only users that have opted into the offer will be placed in the Default Customer Group.

Eligibility Conditions

Delete	And/Or	Type	Details	Information
Customer conditions				
X		Customer	Best Customers.	

Conditions

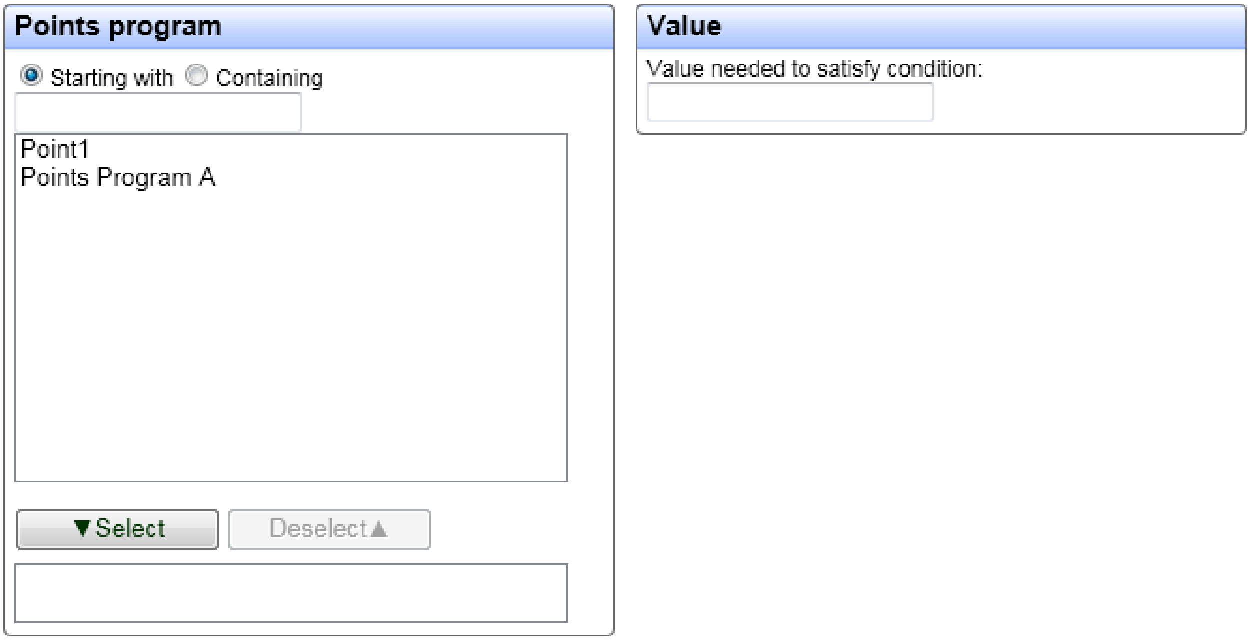
Delete	And/Or	Type	Details	Information
Customer conditions				
X		Customer	Best Customers Opt-In Group	

A few significant features of Customer Opt-in Condition are particularly important to note:

- **Excluded Customers:** Customers that are in an excluded group will not be eligible to Opt-in an offer even if they are a part of the Eligible Customer Group.
- **Excluded Customer Groups:** If a Customer Group has been excluded in the Customer Condition, then the Customer Group will not be available to choose when selecting a Customer Group for Eligible Customer Condition and vice versa.
- **Any Cardholder:** Choosing Any Cardholder for the Customer Condition will disable the Opt-in Conditions checkbox. Users are not able to choose Any Cardholder for a Customer condition and add an Opt-in condition.
- **Existing Customer Conditions:** If a Customer Condition is already created for an offer, when a user adds a Customer Opt-in Condition, Logix will consider the Default Customer Group and the Existing Customer Group to be linked by an "or" Boolean condition. In other words, a customer needs to be either in order to meet the condition.

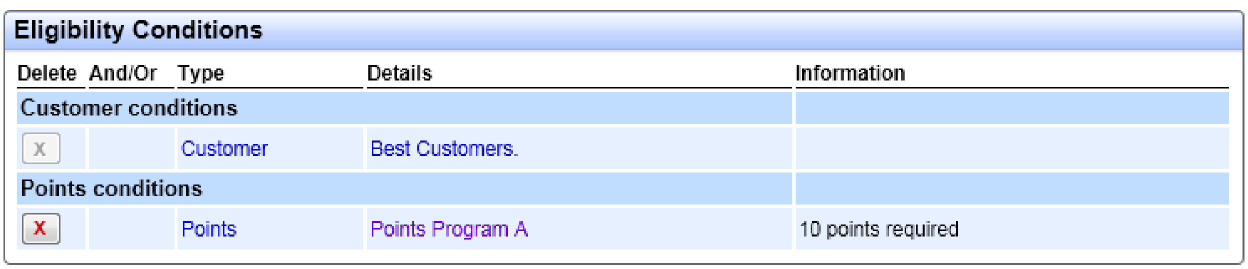
15.1.2 Points

Choosing "Points" for the Opt-in Condition will prompt the user to choose an Eligible Points Program. This will allow customers who have a specific amount of points in a specific Points program to Opt-in the offer. (i.e., if the Eligible Points Program requires 10 points in Points Program A, then the customer must meet these requirements in order to view and opt into the offer.)



Once the Eligible Points Program has been selected, a new Points Eligibility Condition will be created.

Note: *The Customer is not required to have the amount of points defined in the Points Eligibility Condition to satisfy the offer. The Points Eligibility Condition is for Opt-in purposes only.*

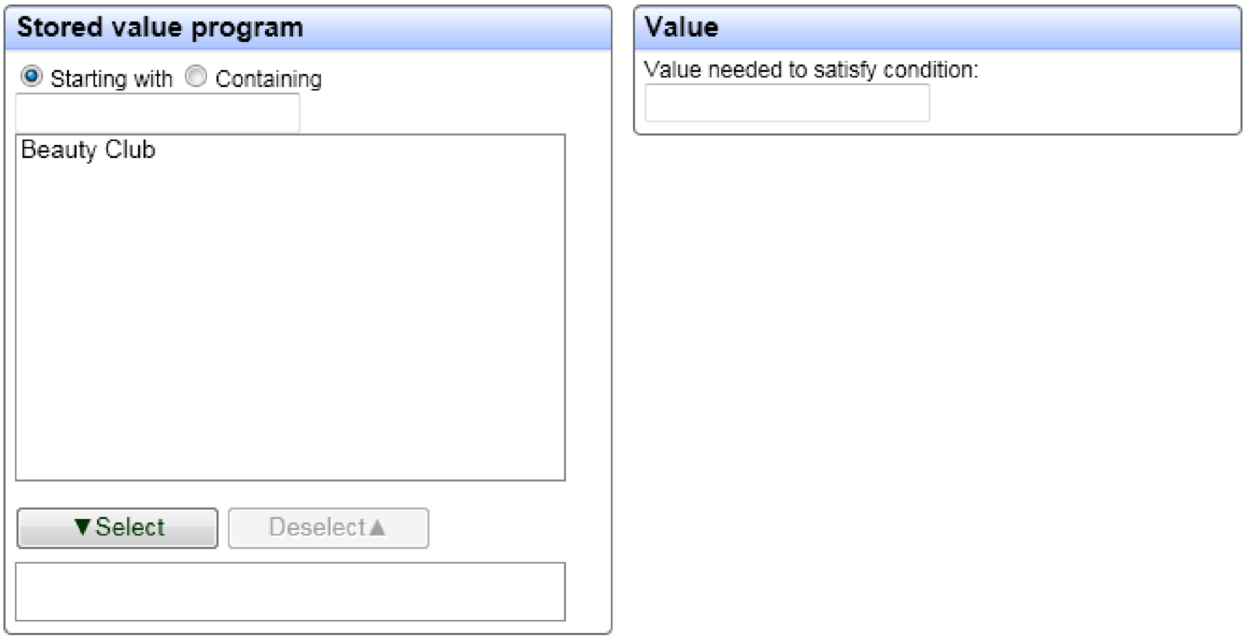


Eligibility Conditions

Delete	And/Or	Type	Details	Information
Customer conditions				
X		Customer	Best Customers.	
Points conditions				
X		Points	Points Program A	10 points required

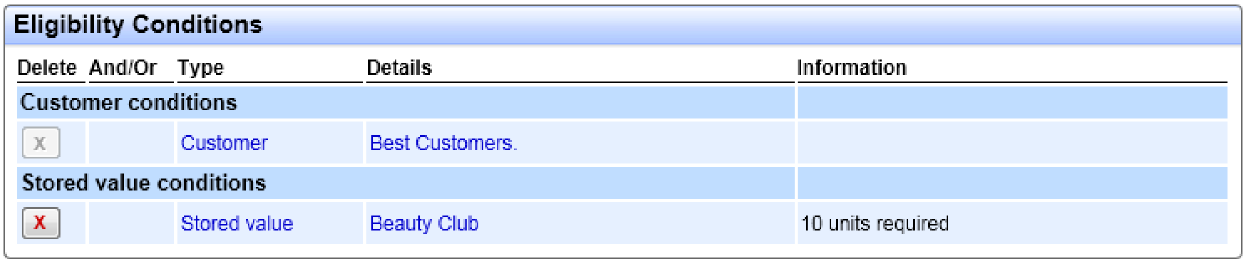
15.1.3 Stored Value

Choosing "Stored Value" for the Opt-in Condition will prompt the user to choose an Eligible Stored Value Program. This will allow customers who have a specific amount of points in a specific Stored Value program to Opt-in the offer. (i.e., if the Eligible Stored Value Program requires 10 points in Stored Value Program A, then the customer must meet these requirements in order to view and opt into the offer.)



Once the Eligible Stored Value Program has been selected, a new Stored Value Eligibility Condition will be created.

Note: *The Customer is not required to have the amount of points defined in the Stored Value Eligibility Condition to satisfy the offer. The Stored Value Eligibility Condition is for Opt-in purposes only.*



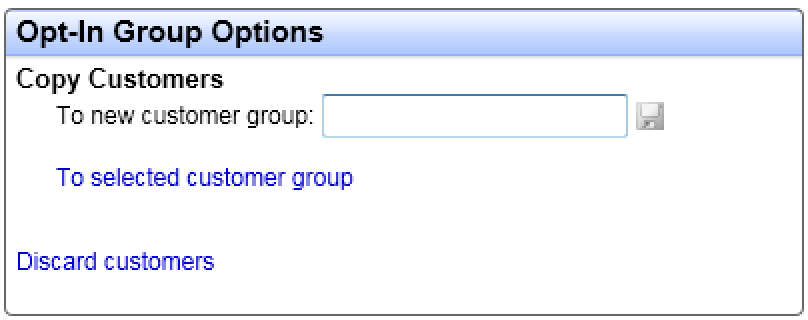
Eligibility Conditions

Delete	And/Or	Type	Details	Information
Customer conditions				
X		Customer	Best Customers.	
Stored value conditions				
X		Stored value	Beauty Club	10 units required

15.2 Opt-out

To Opt-out of an offer, deselect the Opt-In Condition check box. Subsequently, all customers in the Default Customer Group will be removed. After deselecting the Opt-In Condition checkbox, the user is presented with the Opt-in Group Migration Options dialog box. In the dialog box, choose whether the Customers in the *Default Customer Group (Customers who have opted into the offer)* will be saved to a new customer group, merged into an existing customer group, or discarded.

- **New Customer Group:** Enter a Customer Group name in the provided textbox to copy the customers located in the Default Customer Group into a new Customer Group. This Customer Group will become the Customer Condition for the offer.
- **Existing Customer Group**: Select an existing customer group to copy the customer from the Default Customer Group into an existing Customer Group.
- **Discard Customer Group:** A customer condition must be added to the offer before the customers from the Default Customer Group can be discarded.

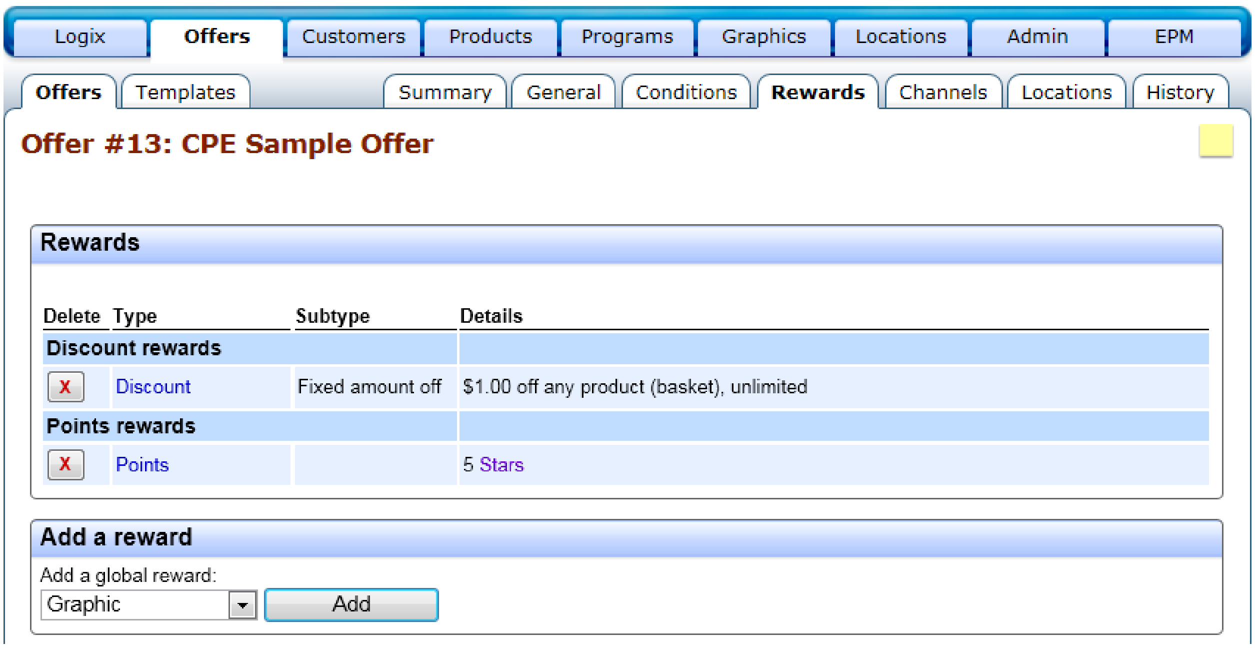


To remove the Points and Stored Value Eligibility Condition, simply click the remove button provided.

16 Rewards

Rewards are those things that are granted, or actions that are performed, when an offer's conditions are met. Rewards fall into the following categories: discounts, printed messages, cashier messages, franking messages, points, stored values, graphics, group membership and pass-thrus. Each one is described in the following chapters.

The *Offers>Rewards* page lists the rewards currently included in the offer. Click the hyperlink in the "Type" column to see details of each condition.



16.1 Create

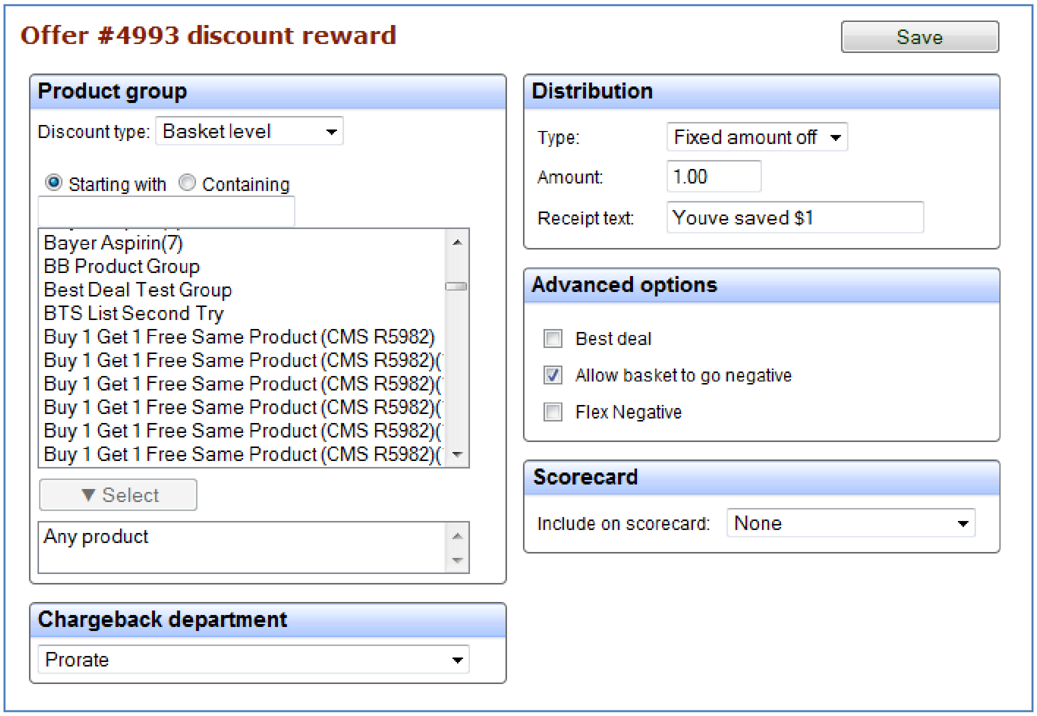
To create a reward, select one of the types from the "Add a reward" dropdown and click Add. A popup will appear which will allow you to define the reward's characteristics. When you're finished editing the reward, click "Save".

16.2 Delete

To delete a reward, click the "X" button next to its name in the list.

17 Discount rewards

Discounts are a common reward type that grants an adjustment to the price of an item or basket.



17.1 Product group

First select whether the discount will be item-level (i.e., affecting the purchase of individual items), department-level (i.e., affecting the purchase of items from a particular department), basket level (i.e., affecting the customer's overall purchase), or Group level conditional (i.e., affecting the overall group purchase of conditional items).

If you selected an item- or department-level discount, select the appropriate product groups to which the discount will apply from the list.

Group level discount type is available for selection when the offer has at least two product group conditions of 1 item. This discount type will not be available on tiered offers.

17.2 Chargeback department

This selector allows you to choose the department against which the discount will be charged. The departments themselves are created and managed through *Admin>Departments*. Selecting a chargeback department allows any discounts that are awarded to be tracked in relation to a specific store department or group.

Default chargeback departments are available for CPE installations that do not use the banners feature. Three system options are used in assigning these values for item-level, department-level, and basket-level default chargeback departments. These options are visible and maintainable on the CPE_SystemOptions page when banners are not enabled at the installation.

The defaults are only applied to unsaved discount when the discount type is changed. Saved discounts will always retain their assigned chargeback department until the user specifically changes the chargeback department for the discount.

NOTE: *CPE engine doesn't support more than four digits of the chargeback department code and hence it will throw an error if it gets chargeback department code of more than four digits.*

17.3 Distribution

The settings in the distribution box control the type of discount the customer receives and how it's granted. First, select a discount type from the dropdown:

- Amount off transaction – This distribution will deduct a certain fixed amount from the overall price of the customer's basket. It's available only if no product groups are selected in the product condition selector.
- Percent off transaction – As above, but deducts a certain percentage from the price of the basket.
- Amount off item – Deducts a fixed amount from the price of items in the selected product group.
- Percent off item – Deducts a percentage from the price of items in the selected product group.
- Amount off by weight/volume – Deducts a fixed amount from each pound or gallon of products in the selected product group.
- Price point – Sets a fixed price for each item in the selected product group.
- Price point by weight/volume – Sets a fixed price for each pound or gallon of items in the selected product group.
- Free item – Items in the selected product group are free.
- Stored value – Awards a certain number of units of stored value for each item in the selected product group.
- Special pricing: price point – Items in the selected product group will be sold at a price determined by the order in which the products are purchased. For example, if you set three price points of $0.67, $0.66 and $0.66, then the first product the customer buys will have a price of $0.67 and the second and third will both have a price of $0.66. The radio buttons to the left of each price point indicate the point at which this cycle will repeat should the customer buy more products than there are price points. In this example, if the button next to the first price point was ticked, then the fourth item would be sold for $0.67, the fifth and sixth for $0.66, the seventh for $0.67 again, and so on. If the *third* price point was the repeat point, then all subsequent items would be sold at $0.66.

You will then define the discount's amount and, depending on the type you chose, its limits. Limits allow you to cap the benefit that a customer can receive from a discount. Examples:

- "$1 off Product A, limit 5." This is set up as a fixed-amount item discount with an amount of 1 and an item limit of 5.
- "Get for free a single item worth $5 or less." This is set up as a free item discount with an item limit of 1 and a dollar limit of 5.
- "Spend $50 and get 5% off your basket, spend more and get 10% off." This is set up as a percent-off basket discount with an amount of 5 and an up-to value of 50; and a second percent-off level (see below) with an amount of 10.

In the case of percent off discounts, Logix will allow you to define both an item limit and a dollar amount up to which the discount will be applied. Next to this "up to" input are two buttons: a down-arrow and an X. Clicking the down-arrow will allow you to specify a different discount which will be applied if the first "up-to" value is exceeded. For instance: using this method you could create a discount which is 10% off up to $25, but $5 off thereafter.

If in this case the second discount level you define is also a percent off, you can click the down-arrow again to create a third level. Clicking the red X button will delete the level.

Finally, the distribution area has a "receipt text" input. This allows you to define a brief message that gets printed on the receipt when the discount is awarded.

17.4 Advanced options

Best deal – A customer may sometimes be eligible for multiple discounts on the same set of products. Checking this box will award the customer the single reward that's most favorable for him or her.

Allow item/basket to go negative – Ticking this box allows the price of either the item or the basket to be discounted below zero.

Flex negative – This option controls whether the amount of a discount will automatically alter ("flex") in order to prevent a total from going negative.

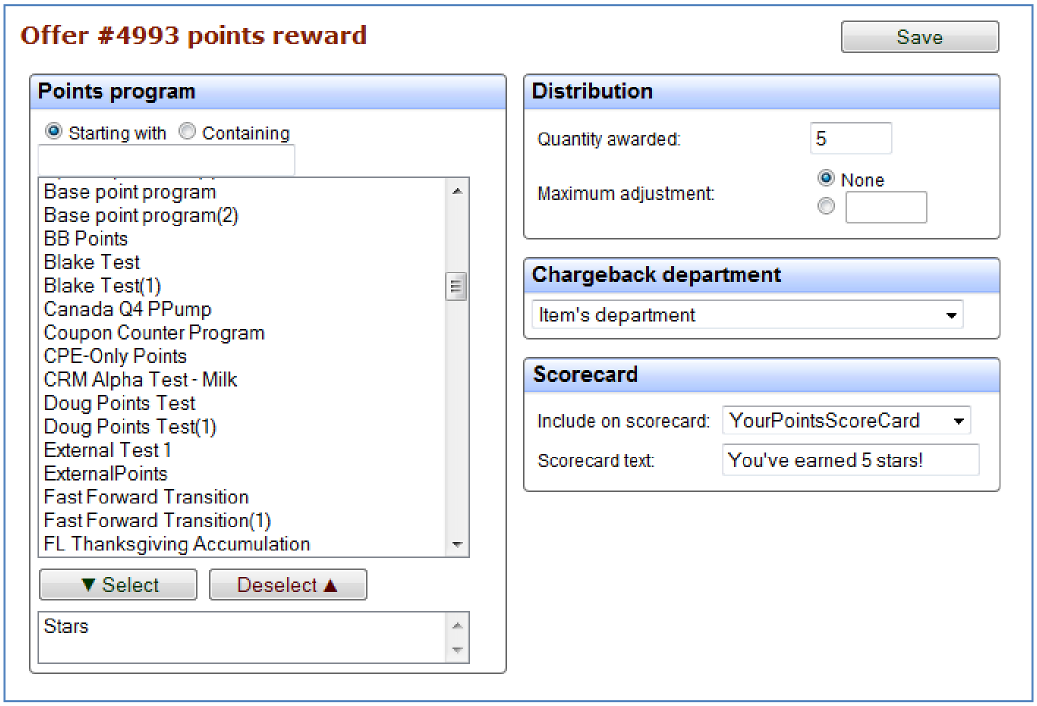
17.5 Scorecard

If a customer purchases a number of items (say 10), each of which receives a discount, then the customer normally would see ten separate small discounts on their printed receipt. Discount scorecards are intended to clarify this by instead grouping and summing all these discounts together into a single area at the end of the receipt.

To associate the discount to a scorecard, simply select one from the list. If you wish to include a short description to be shown on the scorecard along with the summed discount amount, enter it into the "scorecard text" input. For details on creating and managing scorecards, see the Scorecard chapter in the main *Logix User Manual*.

18 Points rewards

A points reward grants a customer a specified number of points in a points program.



18.1 Points program

Select the appropriate points program from the list provided.

18.2 Distribution

Enter the number of points that will be awarded. If you want to remove points from the customer's balance, enter a negative value.

If you want to limit the size of points adjustments that can be made for this reward, enter a value in the "maximum adjustment" input box. If this value is set, then points adjustments made through customer inquiry will produce a warning any time they exceed the value (either as an award or a decrement).

18.3 Chargeback department

If you wish the points rewarded by this offer to be charged against a particular store department, select the department from the dropdown.

NOTE: *CPE engine doesn't support more than four digits of the chargeback department code and hence it will throw an error if it gets chargeback department code of more than four digits.*

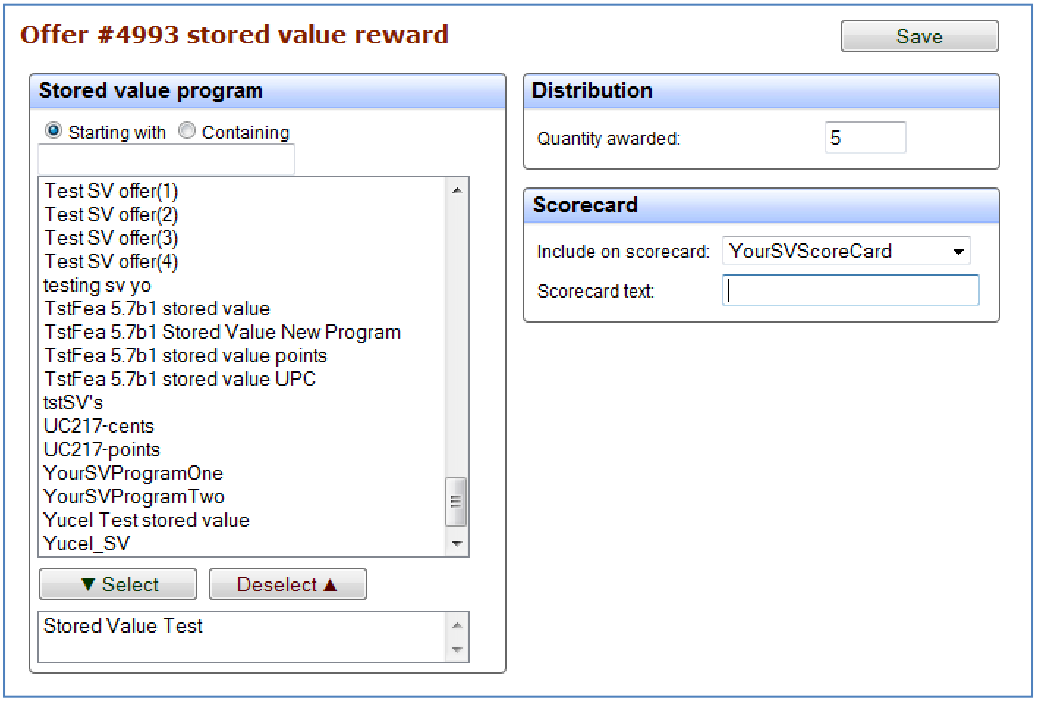
18.4 Scorecard

A scorecard is an area on a printed receipt in which changes to one's points balance are summed and summarized, rather than having those changes sprinkled throughout the receipt. By selecting a scorecard, you're determining that all point changes resulting from this reward during a transaction will be summarized in the selected scorecard. (Note: If a scorecard is already defined on the chosen program itself, you will be unable to pick a different one here in the reward.)

For details on creating and managing scorecards, see the Scorecard chapter in the main *Logix User Manual*.

19 Stored value rewards

A stored value reward is similar to a points reward – it grants the customer a certain number of units from a stored value program, each unit of which is associated to a particular value.



19.1 Stored value program

Select the appropriate stored value program from the list provided.

19.2 Distribution

Enter the number of stored value units that will be awarded. If you want to remove stored value from the customer's balance, enter a negative value.

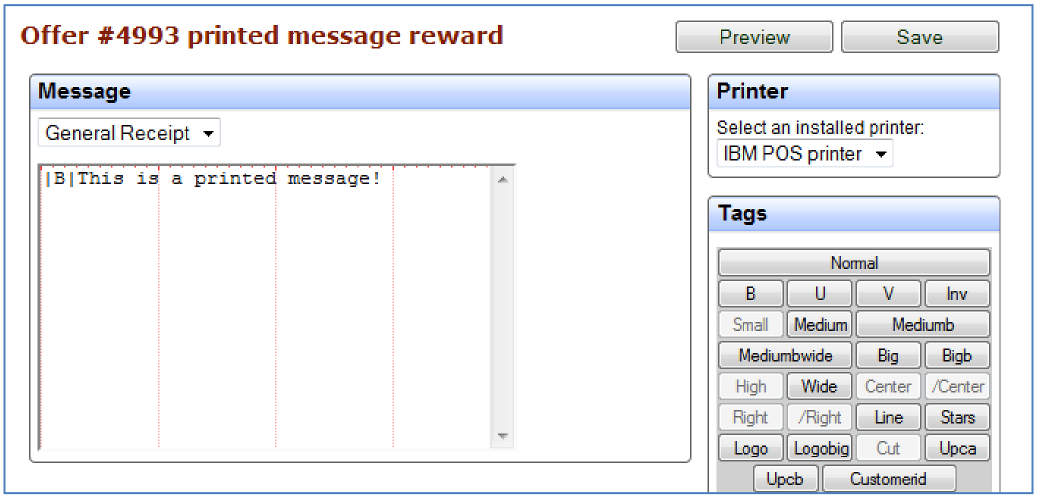
19.3 Scorecard

A scorecard is an area on a printed receipt in which changes to one's stored value are summed and summarized, rather than having those changes sprinkled throughout the receipt. By selecting a scorecard, you're determining that all stored values resulting from this reward during a transaction will be summarized in the selected scorecard. (Note: If a scorecard is already defined on the chosen program itself, you will be unable to pick a different one here in the reward.)

For details on creating and managing scorecards, see the Scorecard chapter in the main *Logix User Manual*.

20 Printed message rewards

A printed message is text included on the customer's receipt.



20.1 Message

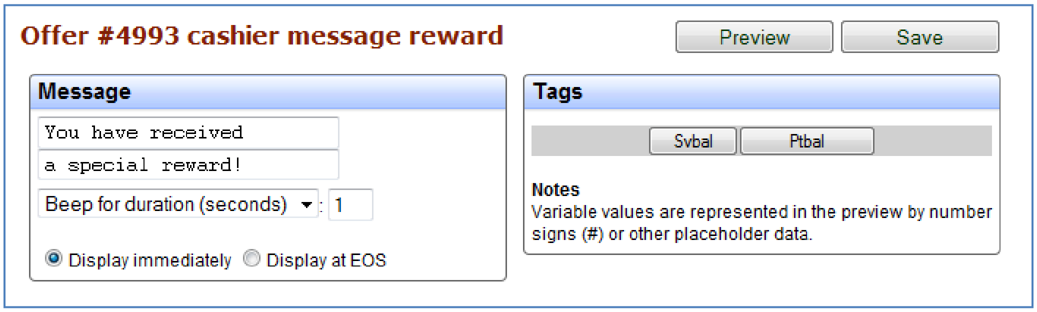
This is where you enter the text of the message. Clicking the buttons next to the text area inserts tags into the message text that control the formatting of text, insert lines or graphics, or insert variable data. See the appendix of the main *Logix User Manual* for a list of printed message tags with descriptions of their functions.

Faint vertical rules appear in the background behind the message box – these are just aids to help you count the number of characters in each row. The rules appear after every 10 characters. Note that the number of characters actually appearing on any given line in the final printed version may be affected by style tags (big, wide, etc.), and that the tags themselves won't appear in the final printed version.

Clicking the Preview button will display in a popup window an approximation of what the message will look like when printed on a receipt.

21 Cashier message rewards

A cashier message is a short text message shown on a pole display or other similar display device.



21.1 Message

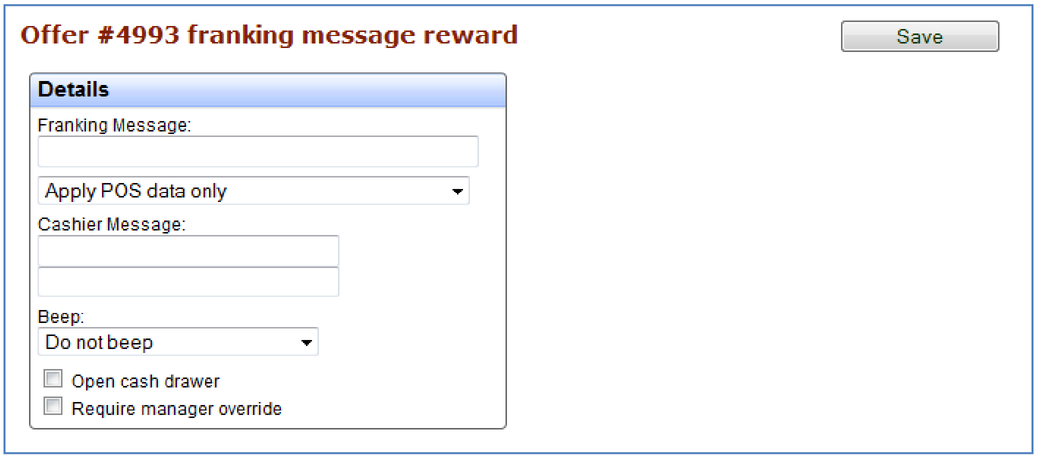
Enter a short text message into the two input boxes provided. The two boxes represent the two lines of text common on cashier displays.

If you want the cashier message to be accompanied by an audible beep produced by the terminal, you can set it with the "Beep" dropdown. The cashier message can produce a single beep, a beep that persists until cleared by the cashier, or a beep that persists for a set number of seconds.

The display radio buttons control whether the cashier message is awarded immediately (as soon as all conditions are met), or if it will be held until the end of sale. Choose the one you prefer by clicking the appropriate button.

22 Franking message rewards

A franking message is a brief message used to indicate that something has been presented to the cashier.



22.1 Message

Enter a short text message into the input box provided.

22.2 Cashier message

If you want a cashier message to accompany the franking reward, enter the text into the two input boxes. If you want the cashier message to be accompanied by an audible beep produced by the terminal, you can set it with the "Beep" dropdown. The cashier message can produce a single beep, a beep that persists until cleared by the cashier, or a beep that persists for a set number of seconds.

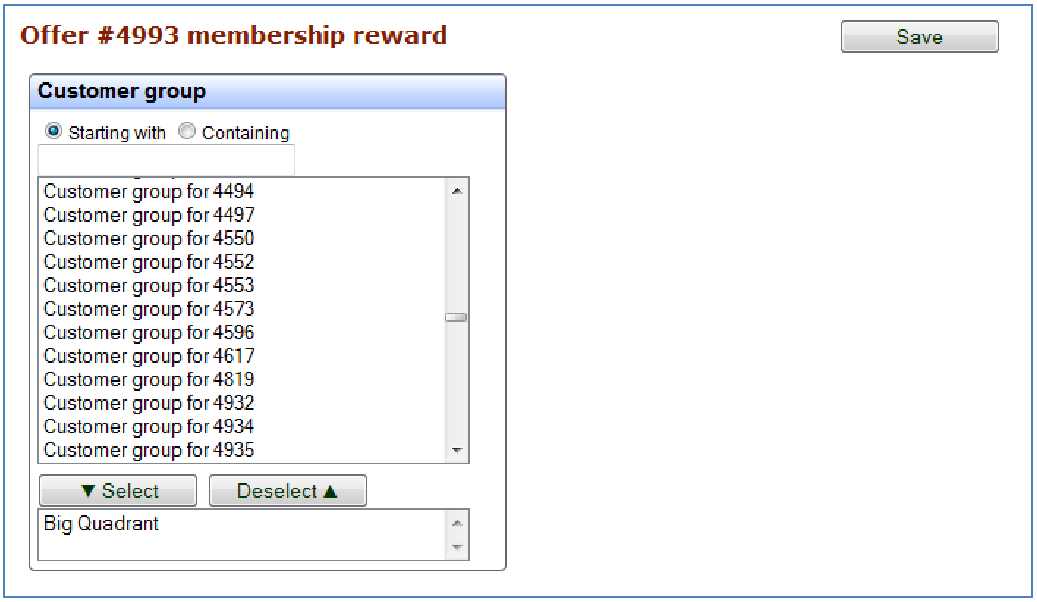
22.3 Advanced options

Select from the dropdown how the message will be applied: with POS data, with the franking message, or with both. Ticking the checkboxes indicates the following franking options:

- Open cash drawer
- Require manager override

23 Membership rewards

This type of condition allows you to reward the customer with membership to a particular customer group. This can be useful if you wish to put customers into groups based on their shopping behaviors; for instance, if someone purchases pet supplies you might want to place them into a pet owners group which will receive special pet-related offers.

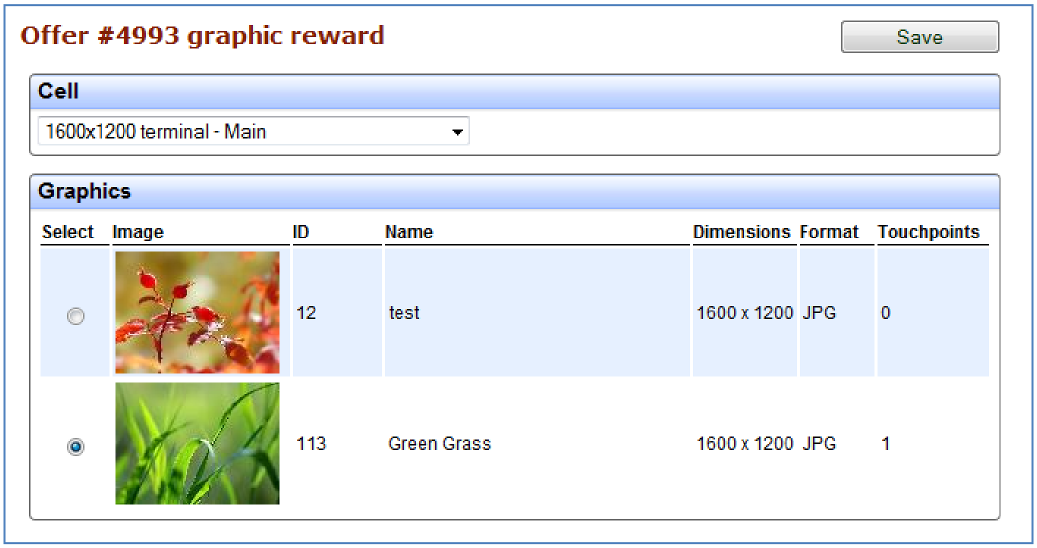


23.1 Customer group

Select the customer group to which membership should be added and click Save.

24 Graphic rewards

A graphic reward presents an image to a customer on a display unit or similar device.



24.1 Cell

Graphics must always be presented in a particular cell in a layout, so before selecting an image you must first choose an appropriate cell. The dropdown lists the cells available – select the one appropriate to the graphic you want.

24.2 Image

Based on the cell you choose, Logix may present you with a number of images in a list, each with a small thumbnail and information about its dimensions, format, name and ID. Click the radio button of the image you want to include in your graphic reward.

Clicking the thumbnail image shows an enlarged version of the image.

25 Pass-thru rewards

Pass-thru rewards send certain predefined types of data down to the terminal when an offer is redeemed. There may be zero, one or more pass-thru reward types available in your installation of Logix; each one will appear as a separate, distinct reward on the *Offer>Rewards* page.

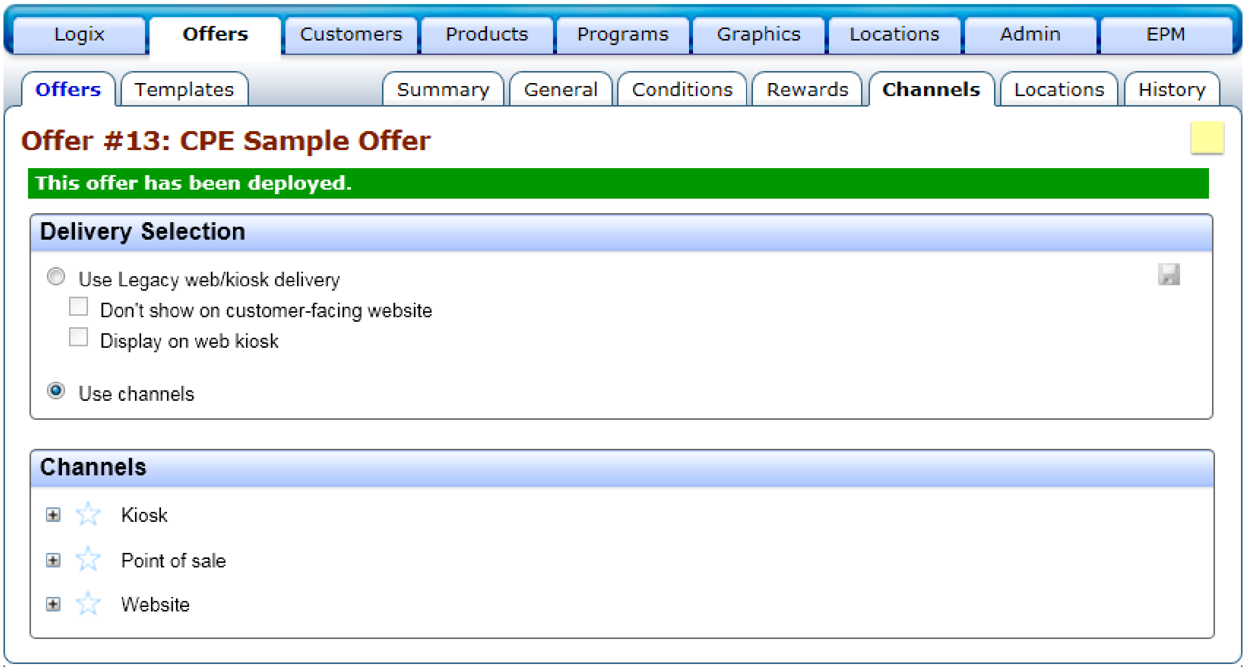
To create a pass-thru reward, select the appropriate type from the "add a reward" selector and click "Add".

25.1 Data

The "data" section of the pass-thru reward popup will be configured to solicit particular data in various forms: as a text input, as a selection from a dropdown menu, etc. Enter or select the appropriate information and click "Save".

26 Channels

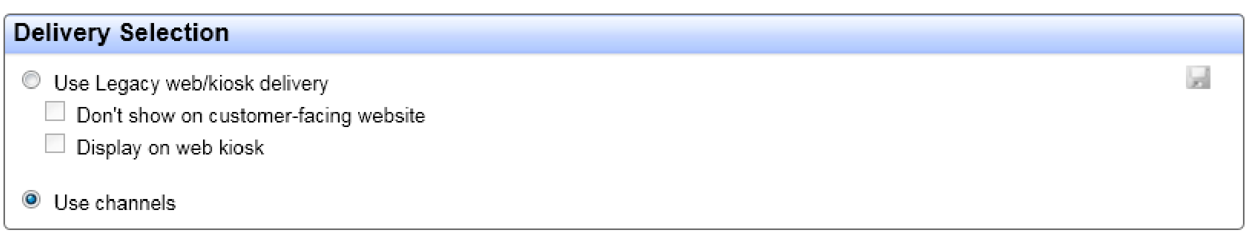
The *Channels* page allows a user to distribute CPE offer data to different channels to notify customers of upcoming and/or existing offers.



26.1 Delivery Selections

Users have the option to have offer details distributed via the previous existing Legacy: web/kiosk delivery method or opt to use the channel delivery method.

- Legacy: web/kiosk delivery: Website/Kiosk engine that allows retailers to advertise offers via website and/or kiosk. (Use for installations prior to 5.19 Logix)
    - **Do not display on customer-facing website** – Ticking this checkbox will prevent the offer's details from being presented on a customer-facing website.
    - **Display on web kiosk** – Ticking this checkbox will allow the offer to be shown on in-store kiosks. These kiosks, normally computer stations with touchscreens, are sites at which customers can receive information about the offers they're eligible to receive.



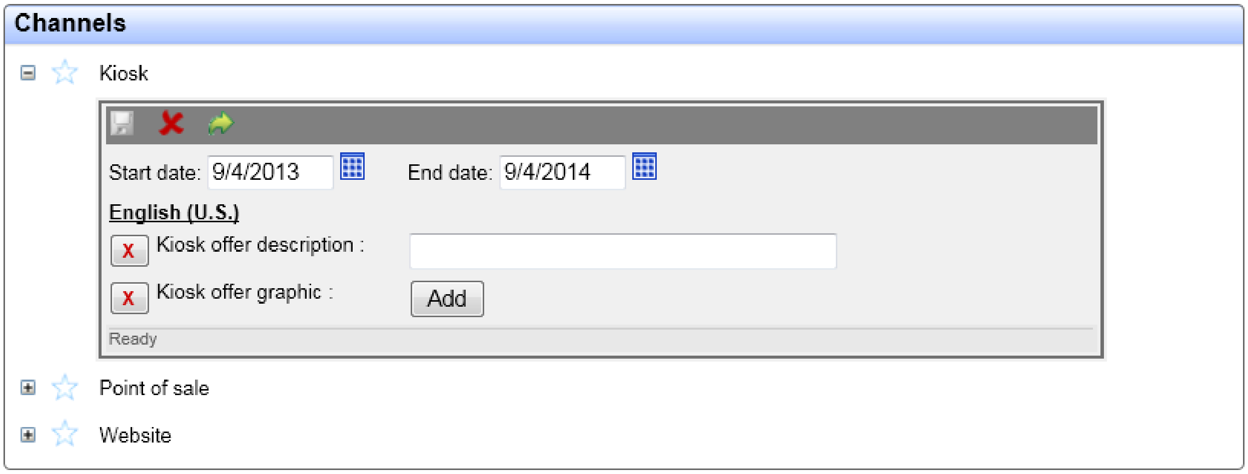
Select either *Legacy: web/kiosk delivery* or *Use Channels* and click the 'save' icon to save your selection. If "*Use channels*" is selected, after saving your selection, you must then configure the channels you wish to use.

26.2 Channels

Channels allow retailers an enhanced way to advertise offers to customers via the Kiosk, Point of Sale (POS), or Website. Retailers can chooose all 3 channels or specify certain channels to which to send offer data.

26.2.1 Kiosks

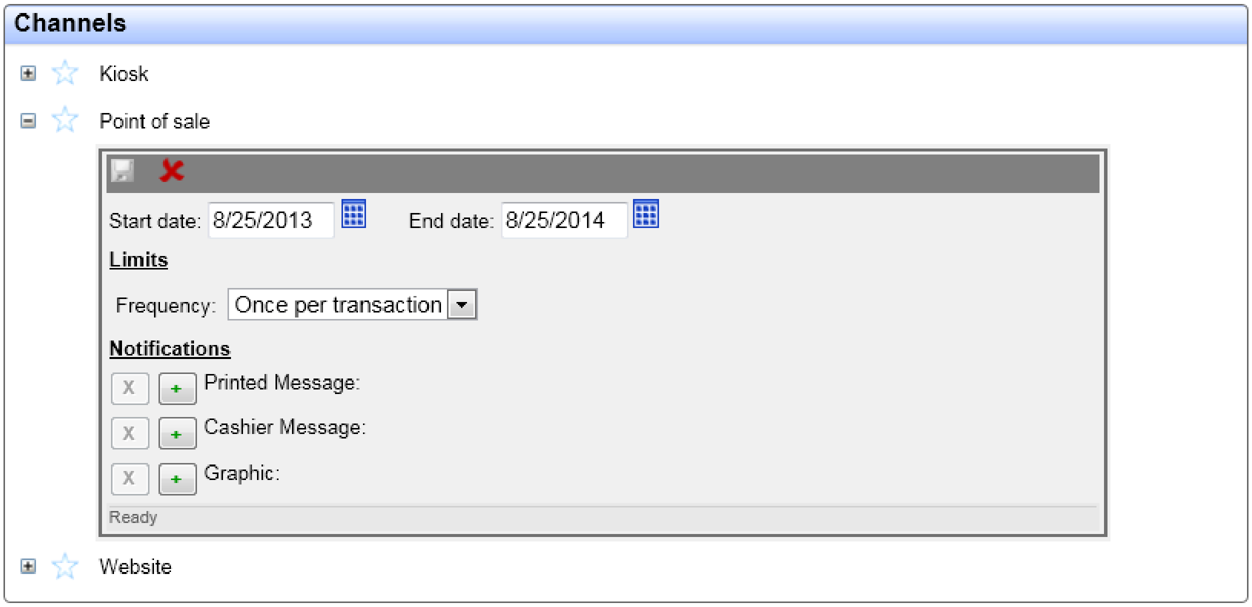
- **Start/End Dates:** Offer data will be advertised on the kiosk during these defined dates.
- **Kiosk offer description:** Description of the offer details which will be displayed on the Kiosk.
- **Kiosk offer graphic:** An image can be added to be displayed on the Kiosk.



26.2.2 Point of Sale (POS)

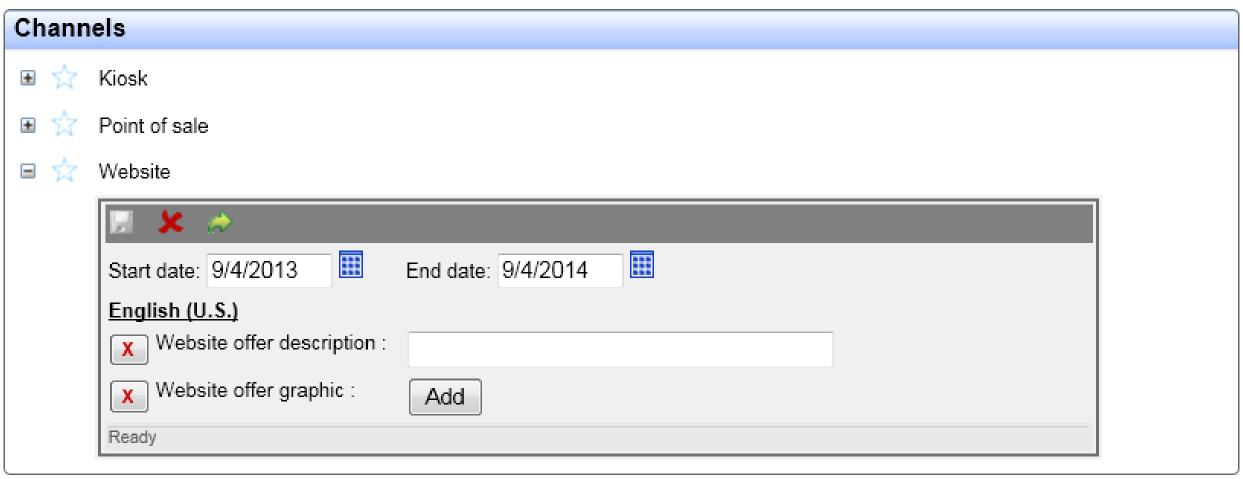
- **Start/End Dates:** Offer data will be advertised on the POS during these defined dates.
- **Limits** – Limits control the frequency at which the offer data notifications are made available.
  - **Once per transaction** –is computed once per single POS transaction
  - **Once per day** – Offer notification messages will only be advertised once per day.
  - **Once per week** –Offer notification messages will only be advertised once per week.
  - **Once per offer** – a promotional variable is updated at the end of a POS transaction for this customer or household and is never reset
  - **Custom** – eligibility can be defined by limit, period based on hours since last award or days since last incentive. Configuring a custom limit as hourly with a value of 1 hour is interpreted as a once per transaction limit. The smallest hourly limit period that can be used is 2.
- **Notification**

  Notification are closely related to rewards, but unlike regular rewards that are granted when the offer's conditions are met, notifications may be granted earlier, while a customer is still earning or accumulating to meet the offer's conditions. Printed messages, accumulation messages, cashier messages and graphics can be granted as notifications.



26.2.3 Website

- **Start/End Dates:** Offer data will be advertised on the website during these defined dates.
- **Website offer description:** Description of the offer details which will be displayed on the Website.
- **Website offer graphic:** An image can be added to be displayed on the Website.



27 Locations

The *Locations* page allows you to select where the CPE offer will be available.

27.1 Store groups

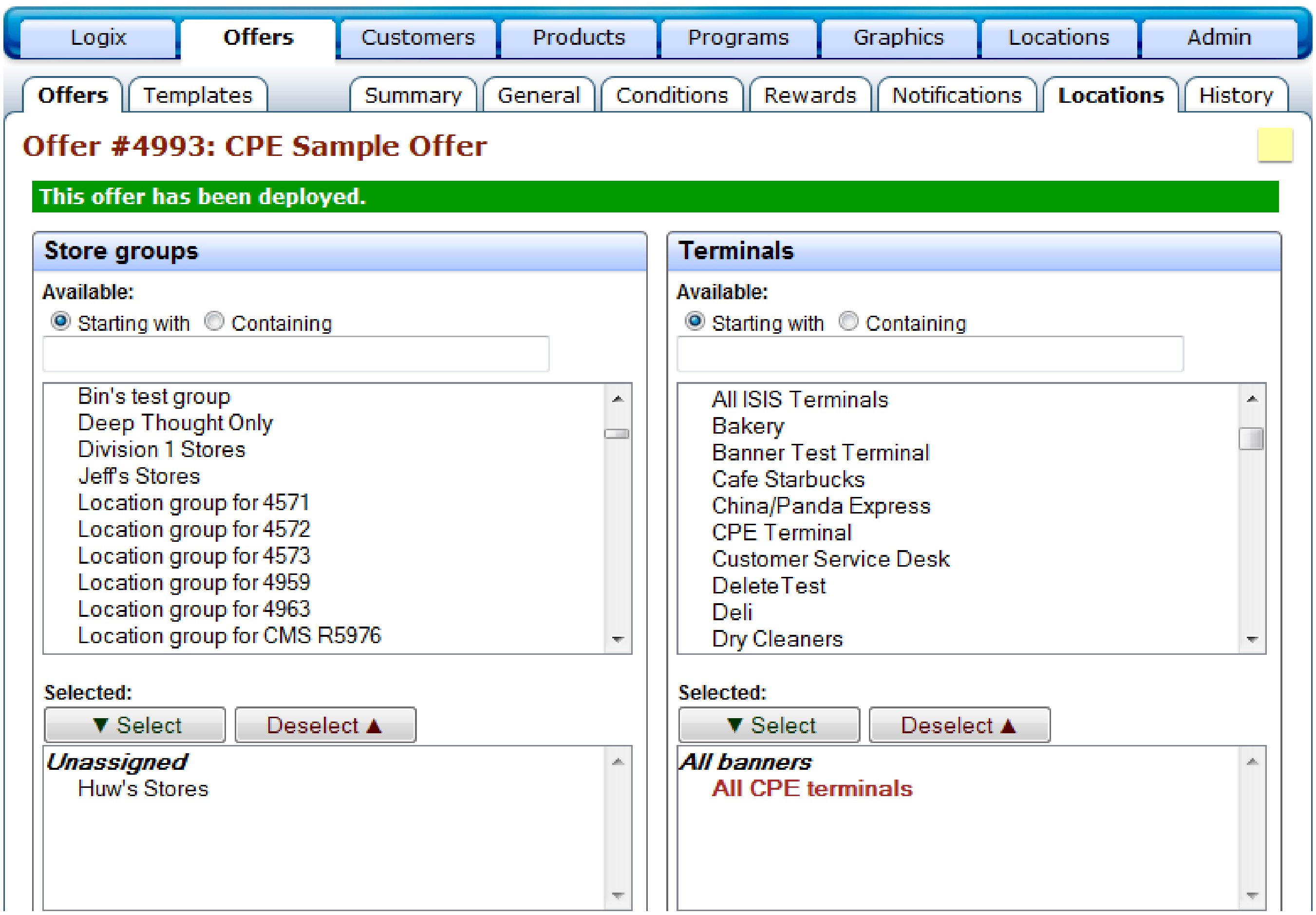
To make the offer available to the stores in a particular group, select the group from the "Available" list and move it to the "Selected" list. To make the offer available at all stores, select "All Stores" and move it to the "Selected" list. When “All Stores” is selected, you can optionally specify a store group to exclude from it by adding it to the “Excluded” list.

If your organization uses multiple banners, the stores in the list will be grouped by banner.

27.2 Terminals

In some cases you may want an offer to be available at regular checkouts but not express lanes, or at fuel stations only. Select the terminal types you want from the "Available" list and move them into the "Selected" list. To make the offer available at all terminals, select "All CPE terminals" and move it to the "Selected" list. When “All CPE Terminals” is selected, you can optionally specify one or more terminals to exclude from it by adding them to the “Excluded” list.

If your organization uses multiple banners, the terminals in the list will be grouped by banner.



28 History

All activity related to a CPE offer is recorded and displayed in the offer's *History* page, ordered to show the most recent actions first. Each entry in the list displays the date and time that the action occurred, the user who performed it, and a brief description of what was done.

Change History

Overview

The table below logs the changes that have been made to this document over time.

Ver	Changes	Author	Date
1.1	• Change History Creation • Added Group Level discount type	CMK	9/16/12
1.2	• Modified General section on limits	CMK	1/23/2013