USER GUIDE

Advanced Marketing Solution (AMS) Logix for the Universal Engine (UE)

Release 6.4

BCC5-0000-5016
Issue A

To maintain the quality of our publications, we need your comments on the accuracy, clarity, organization, and value of this book. Please use the link below to send your comments.

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Preface

Audience

This book is written for business people who create and manage offers either for personal marketing or for buyers, buyer assistants, help desk personnel, or managers.

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References

- *AMS Logix User Guide for the Consumer Marketing (CM) Engine* (BCC5–0000–2355)
- *AMS Logix User Guide for the Copient Promotion Engine (CPE)* (BCC5–0000–2354)
- *AMS Logix Installation and Configuration Guide* (BCC5–0000–5009)
- *AMS Enterprise Preference Manager (EPM) Installation and Configuration Guide* (BCC5-0000-5015)
- *AMS Brokers Installation and Configuration Guide* (BCC5–0000–5097)
- *AMS Promotion Engine Installation and Configuration Guide* (BCC5–0000–5098)
- *AMS C&M Analytics Integration User Guide* (BCC5–0000–5099)

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Revision Record

Issue	Date	Remarks
A	Jan 2018	First Issue—Release 6.4 New feature: • Offer Approval Workflow

Chapter 1: Introduction to NCR Advanced Marketing Solution

Overview

The NCR Advanced Marketing Solution (AMS) is an offer management solution. It provides a consumer–specific and multichannel offer management solution to help marketing professionals consistently and effectively execute offers.

An offer management solution is software that can be integrated into a retailer's back–end and front–end systems to create customized promotional offers or programs. These offers are created based on consumer buying habits across demographics and the current shopping environment. The solution can also allow consumers to accumulate rewards such as redeemable points.

Specifically, AMS allows retailers to do the following:

- Coordinate and manage offers, points programs, or incentives and then view real–time results through its web–based interface — the Logix application.
- Integrate with a store's point–of–sale application using a reward engine or any of its communications channels like print media and email.

This chapter provides an overview of the AMS system to understand the Logix application and its components.

Logix Application

The Logix application is the key feature of AMS. It is the web–based interface to AMS. Logix enables marketing professionals to assemble offers with specific behaviors that manages customer and product data. It includes the following features:

- Offer builder
- Offer templates
- Multiple execution channels
- Importing/exporting offers
- Hierarchical product and store organization
- Customer membership information
- Role–based permissions
- Customer service and help desk features
- System health monitoring

Universal Engine (UE)

The Universal Engine (UE) is the promotion engine used in both NCR and non–NCR POS environments. A promotion engine is the rule by which offers are built, stored, communicated, and issued. These offers are created and managed through the Logix Offer Builder. For more information, refer to *Offers* on page 154.

Note: AMS can also integrate with other pre–existing promotion engines if a store solution is already in place.

An additional promotional engine is also available based on, and closely resembling the main UE:

- **Website**—intended to target offers to customer–facing websites.

Communication Channels

AMS can also integrate with a store's consumer communications channels for more opportunities to inform consumers of promotions. Integrating these promotions across a range of channels help retailers manage promotional content and deliver consistent messaging to consumers.

Example: Consumers who have viewed a promotion from a retailer's website may redeem it at the store's point of sale by providing a loyalty card.

AMS using Logix with the UE Offer Builder can integrate with the following channels:

- Kiosk
- Point–of–Sale (POS)
- Website

Kiosk

In–store kiosks provide a convenient way of communicating with customers at the decision point. This channel provides graphics, offer details, and targeted messaging, and other dynamic content. For more information, refer to *Setting the Kiosk Channel* on page 340.

Point of Sale (POS)

By integrating directly with the POS hardware, the store solution can track customer and purchase activities in real time. This channel also enables comprehensive discounting functionality and dynamic printed messages. For more information, refer to *Setting the POS Channel* on page 344.

Retailer Website

Consumers can access a retailer's website using loyalty card numbers or other identifiers to perform any of the following tasks:

- View active offers
- Select other offers they would like to receive
- View their points or continuity balances
- Update their personal account information

For more information, refer to *Setting the Website Channel* on page 347.

Chapter 2: Understanding the Logix Application

Overview

The Logix application is the web–based interface to the Advanced Marketing Solution (AMS). It helps marketing professionals create and assemble offers with specific behaviors that control customer and product data. This chapter provides an overview of the following:

- Offer building process
- Logix major functions

Building Offer Procedures

Logix permits users to create and build offers; and deploy them to stores. But, only users with the appropriate offer creation permissions can create and build offers. For more information, refer to *Permissions* on page 839.

Note: The examples used in this publication are not intended to recommend a configuration for a specific site.

Each Logix offer pulls together numerous elements into a single, coherent whole that is managed through the Logix Offer Builder. To build offers, the following procedures must be performed:

1. Do the following in any order:
    a. Create an offer. This serves as the container that holds the configuration of all offer elements. For more information, refer to *Creating New Offers* on page 154.
    b. Create a configuration for each of the following offer elements:

    Note: Each offer element has a corresponding main tab in the Logix UI. For an overview of each tab, refer to the corresponding sections in this chapter.

    - **Customer**. For more information, refer to *Defining Customer Configuration* on page 357.
    - **Product**. For more information, refer to *Defining Product Configuration* on page 415.
    - **Program**. For more information, refer to *Defining Program Configuration* on page 485.
    - **Location**. For more information, refer to *Configuring Offer Locations* on page 509.

2. Build an offer configuration from the Offer Builder by doing the following:

Note: For more information, refer to *Using the Logix Offer Builder* on page 145.

   a. Specify offer parameter values. For more information, refer to *Defining Offer Parameters* on page 146.

   b. Determine when to trigger offers by setting offer conditions. For more information, refer to *Offer Conditions* on page 193.

   c. Determine the customer groups that are eligible to opt–in or opt–out of an offer by setting eligibility conditions. For more information, refer to *Eligibility Conditions* on page 249.

   Note: Eligibility conditions are optional.

   d. If applicable, specify the things that are granted or actions to perform when offer conditions are met. For more information, refer to *Offer Rewards* on page 261.

   e. Specify how to distribute offer data to notify customers of upcoming and existing offers. For more information, refer to *Offer Channels* on page 339.

   f. Determine the location where the offer is available to customers. For more information, refer to *Offer Locations* on page 354.

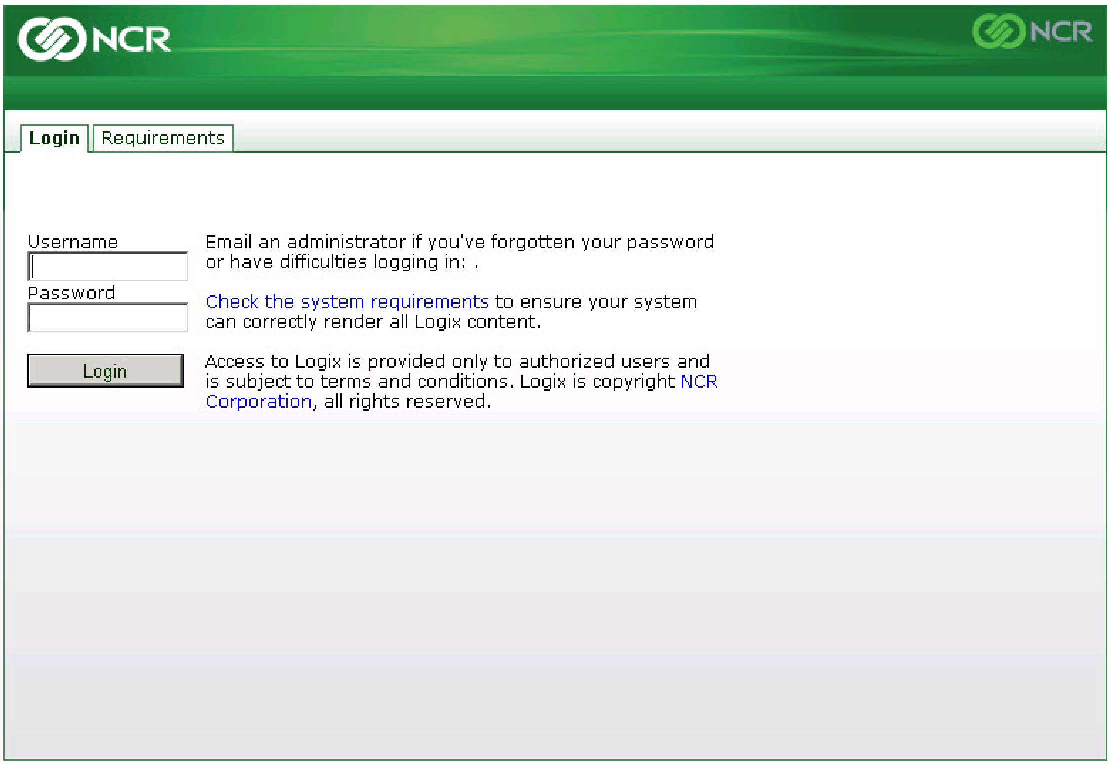
3. Deploy an offer. Deploying offers marks them as ready to be active in stores. For more information, refer to *Deploying Offers* on page 177.

Logging on to Logix

Logging on to Logix requires a Username and a Password. If logging on to Logix for the first time, the user may need to change password. For more information, refer to *Logging on for the first time* on page 11.

To log on to Logix, follow these steps:

1. Go to the Logix website using the server's IP address. The Logix application Login page is displayed.



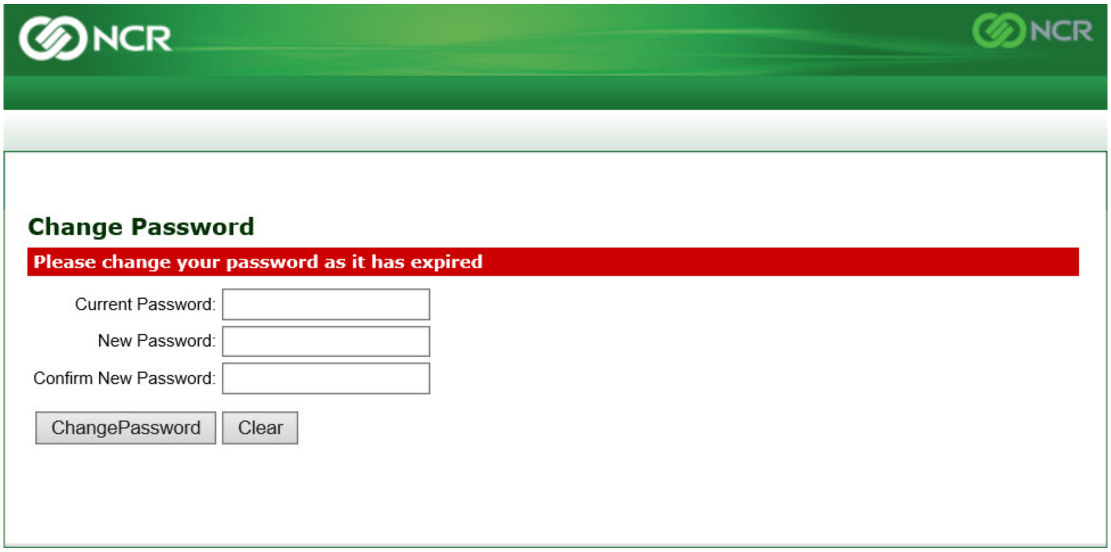
Note: Please take note of the following:

- To open the Logix website, use the following format: http://<localhost>/logix/login.aspx.
- To access Logix locally using http://127.0.0.1/ or http://<IP address>/ on the Internet Explorer browser, make sure to add these URLs first in the Internet Explorer Trusted Sites.

2. Enter the **Username** and **Password**.

3. Select **Login**. If the logon is successful, the Status page is displayed by default.

If the logon is unsuccessful due to an expired password, the following message is displayed.



Enter a new and valid password to log on successfully. This password is then automatically saved in the user's account settings.

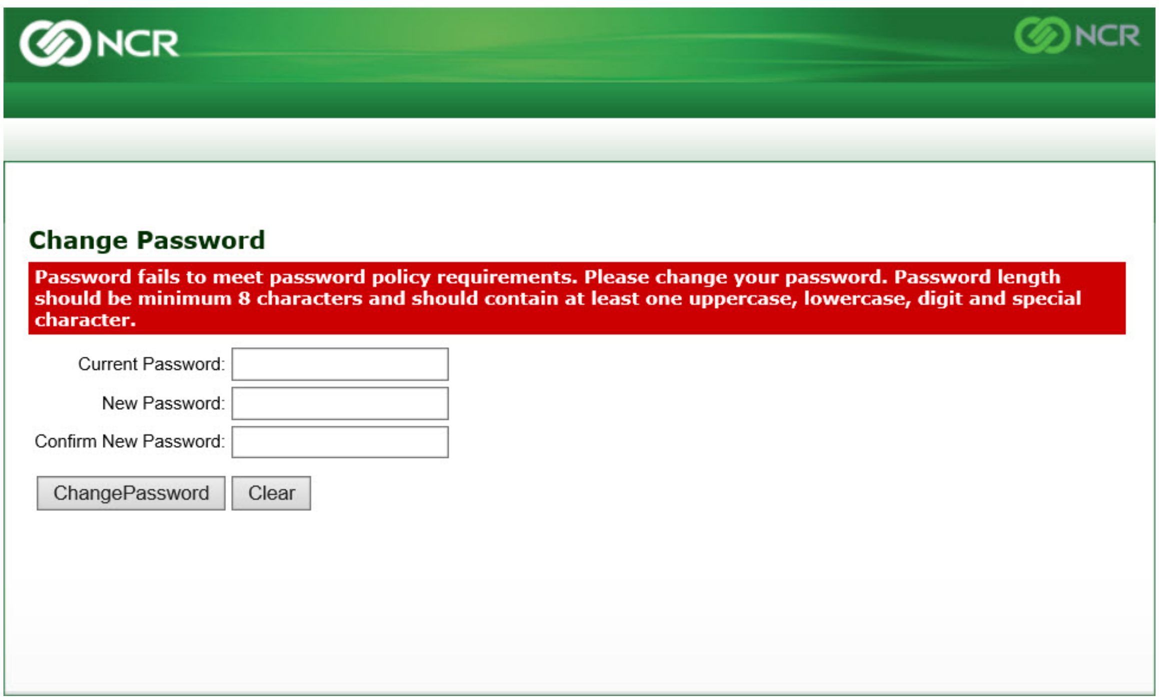
Note: For information on using Logix, refer to the Logix User Guide for the promotion engine that is used in the system.

Logging on for the first time

User account passwords in Logix must be valid. Each password must have the following password complexity requirements:

- It should contain a minimum length of 8 characters.
- It should contain at least one each of the following:
  - Upper–case letter
  - Lower–case letter
  - Special character
  - Numeric character

On the first log on after installing Logix, the Username is **admin** and the Password is **admin** by default. Because **admin** does not pass all of the password complexity requirements, the following window is displayed upon initial logon.

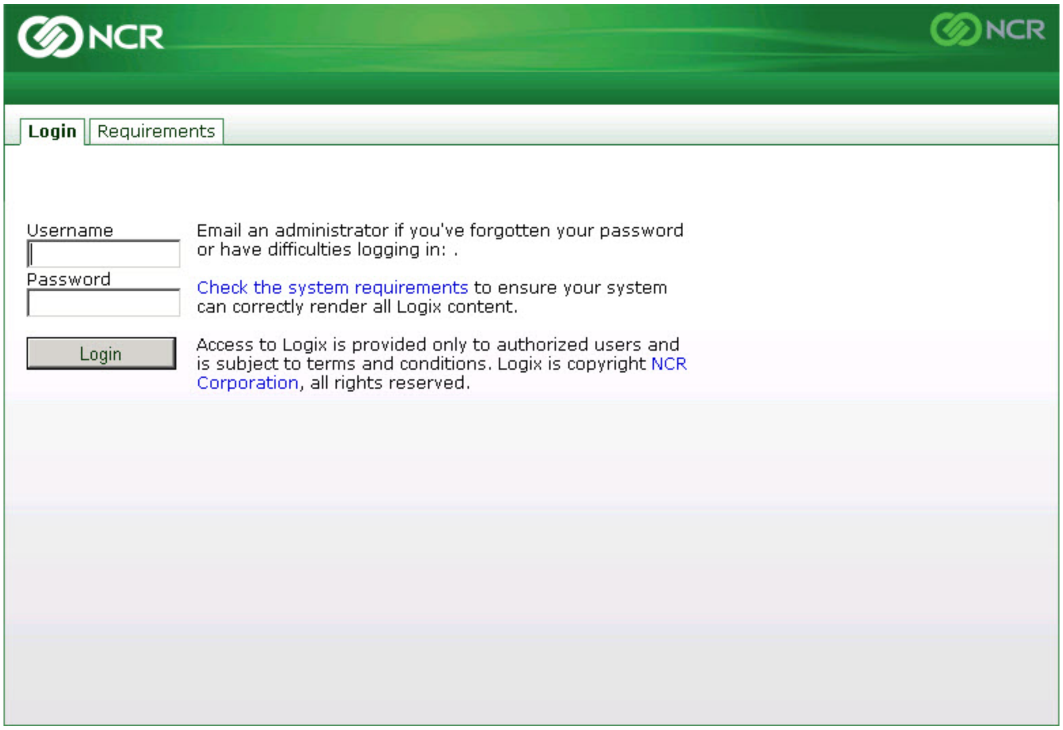


The user must change the password at the Login page to a valid one.

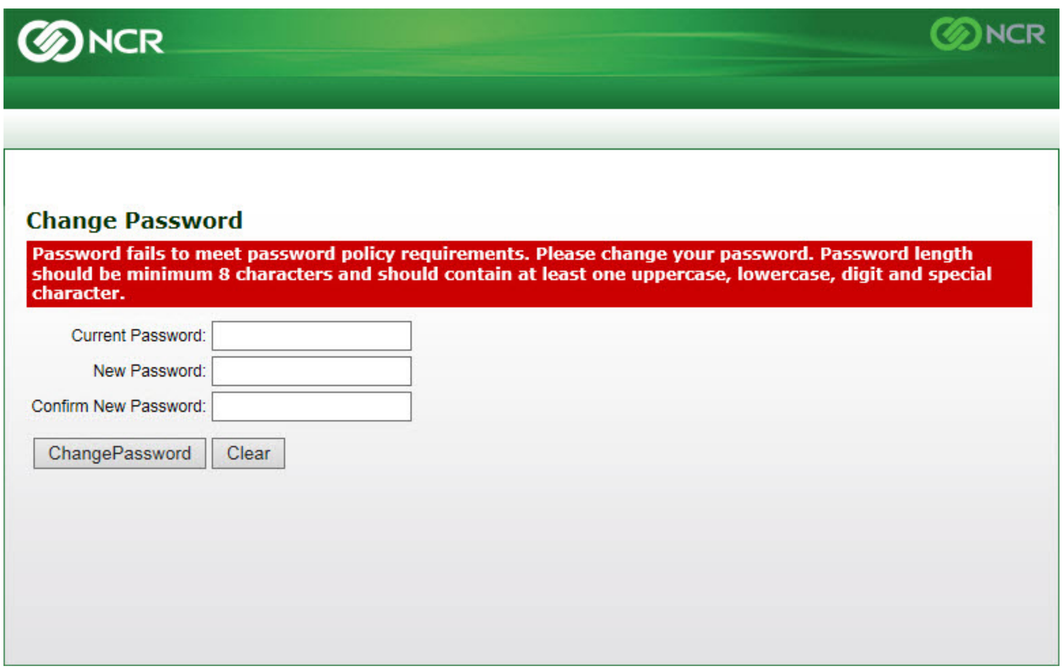
Changing the User Account Password

To change password during the first logon, follow these steps:

1. In the Logix Login page, enter the **Username** and **Password**, and then select **Login**.



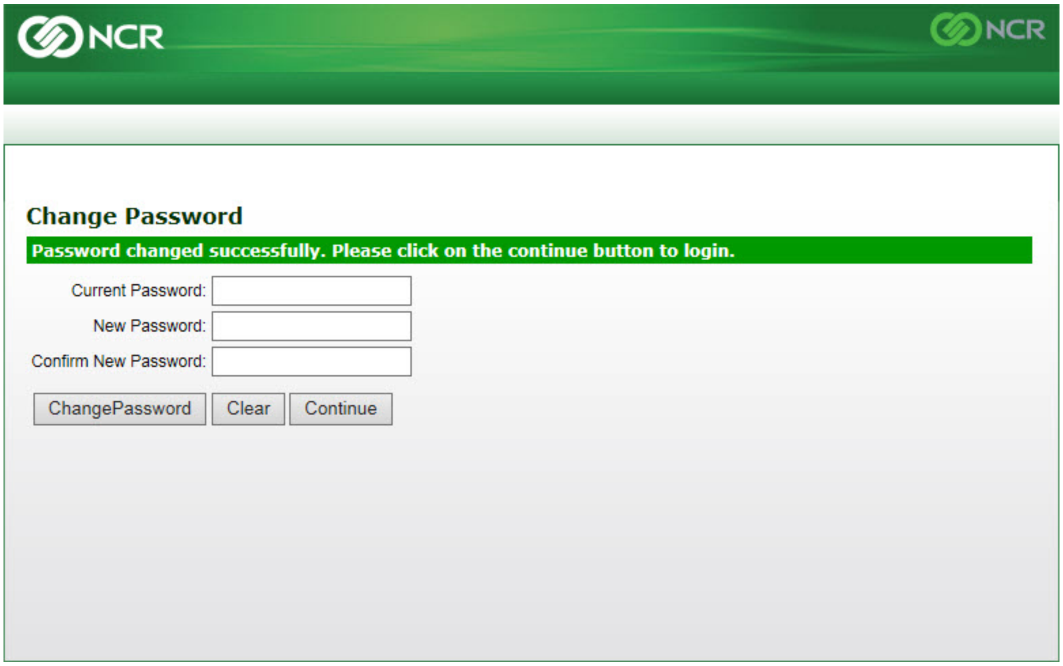
The Change Password window is displayed.



2. Enter the **Current Password**.
3. Enter and then confirm the **New Password**. The new password must be valid.
4. Select **ChangePassword**.

Note: Selecting the *Clear* button clears the data entered in the fields.

The system changes the password and displays the following message.



5. Select **Continue** to display the Logix Login page and to log on using the new password.

   User account passwords may also be changed in the User Configuration page. For more information, refer to *Changing the User Account Password* on page 576.

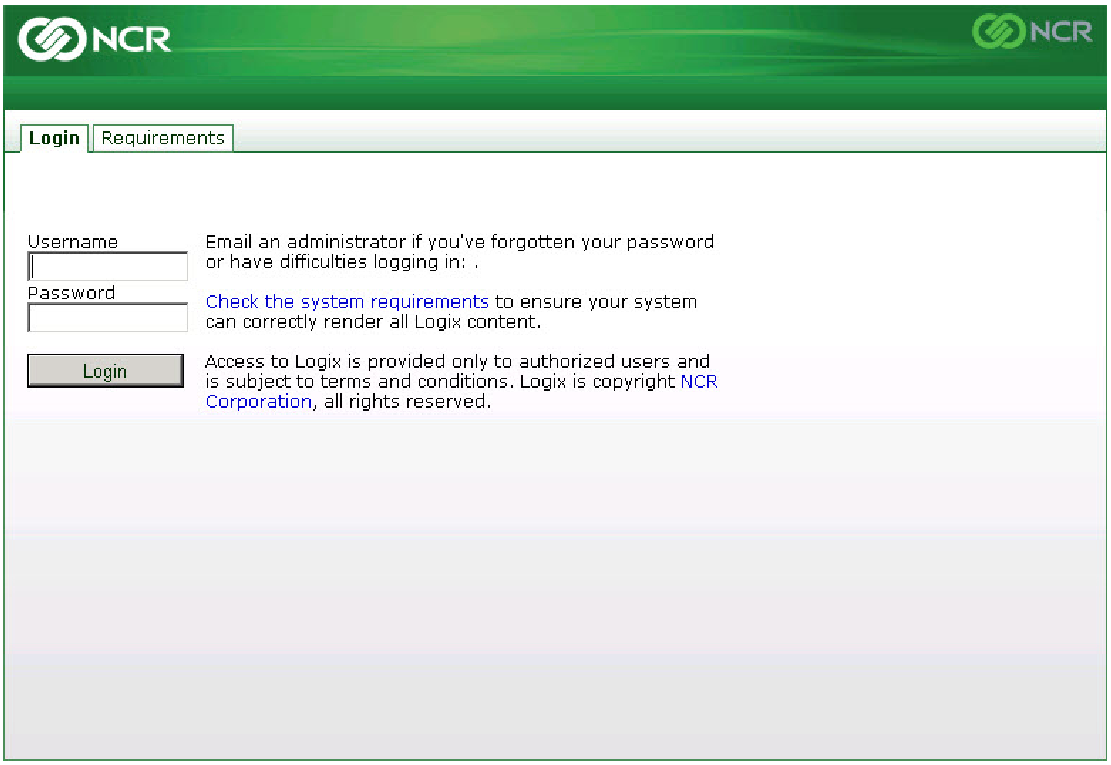
Logging On to Logix with Enabled Authentication

If the second factor authentication is enabled in the system, users must enter a One–Time Password (OTP), aside from their user account password, to successfully log on to Logix.

Note: For more information about the second factor authentication, refer to *Second Factor Authentication* on page 587.

To log on to Logix with enabled second factor authentication, follow these steps:

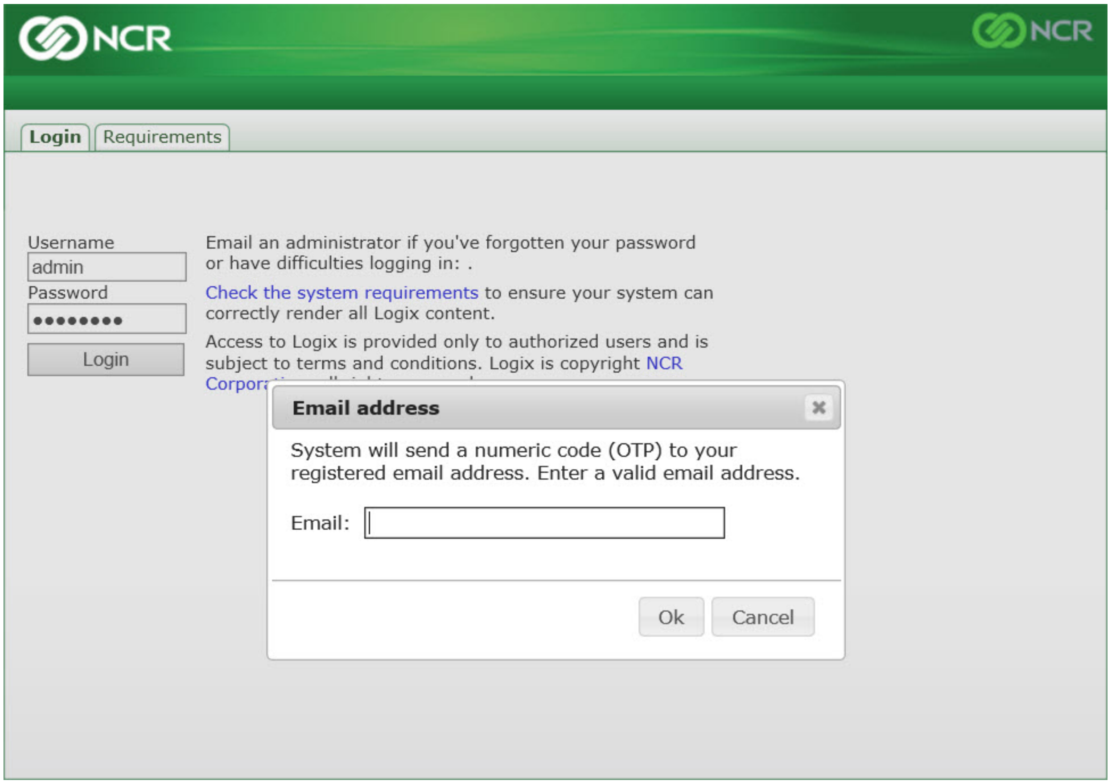
1. Go to the Logix website using the server's IP address. The Login page is displayed.



Note: Please take note of the following:

- To open the Logix website, use the following format: http://<localhost>/logix/login.aspx
- To access Logix locally using http://127.0.0.1/ or http://<IP address>/ on the Internet Explorer browser, make sure to add these URLs first in the Internet Explorer Trusted Sites.

2. Enter the **Username** and **Password**.
3. Select **Login**.
4. If users have not associated an email address to their Logix account, the following window is displayed.



Enter a valid email address, and then select **OK**.

Note: The email address is automatically saved to the user's account settings. For information about user accounts, refer to *Accessing User Settings* on page 569.

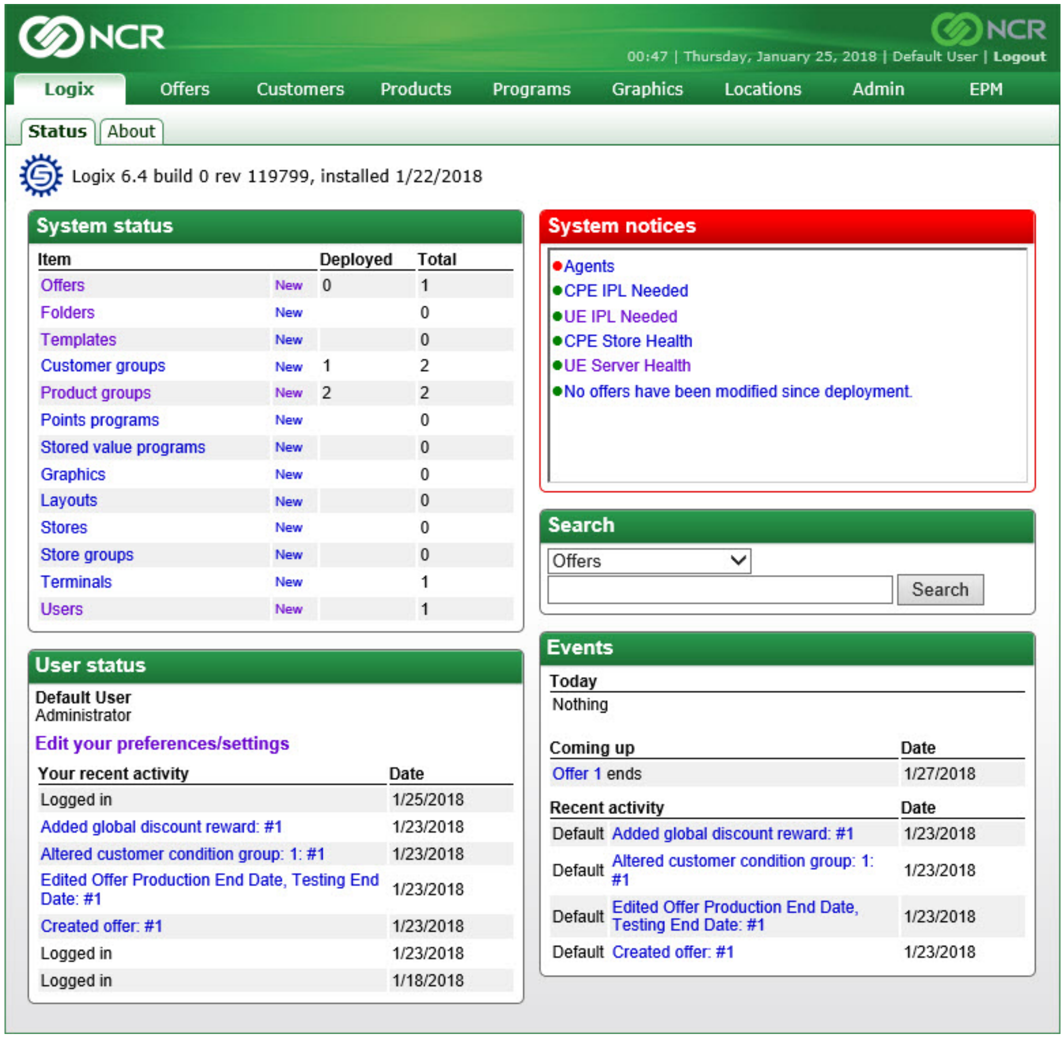
5. If users have already added their email address in their user account settings, the system does not ask for an email address, but instead displays the following window.

Note: Retailers can configure the system to allow users to bypass the second factor authentication the next time they log on to Logix. For more information, refer to *Bypassing the Second Factor Authentication* on page 592.

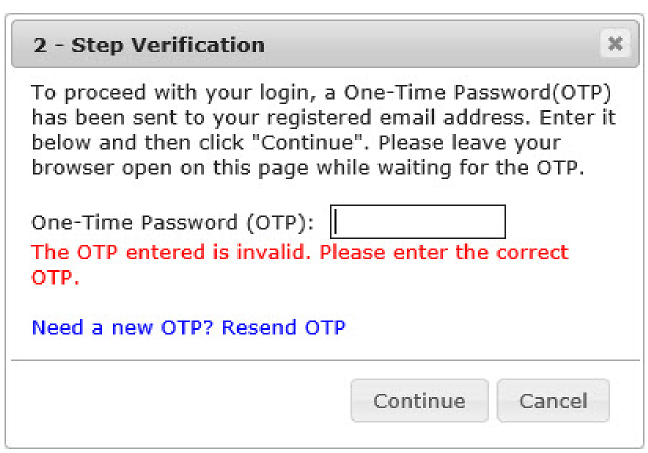
6. Check the email address that is associated with the user account for the One–Time Password (OTP). The OTP is a six–digit numeric code.

7. Enter the OTP in the field, and then select Continue.

a. If the **OTP is valid**, the Status page is displayed by default.

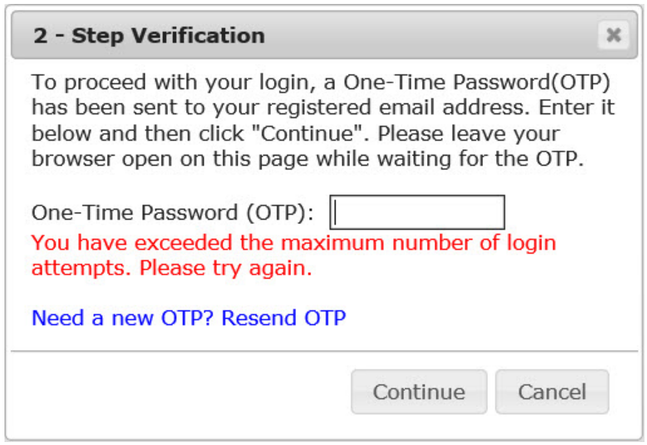


b. If the **OTP is invalid**, the following window is displayed.

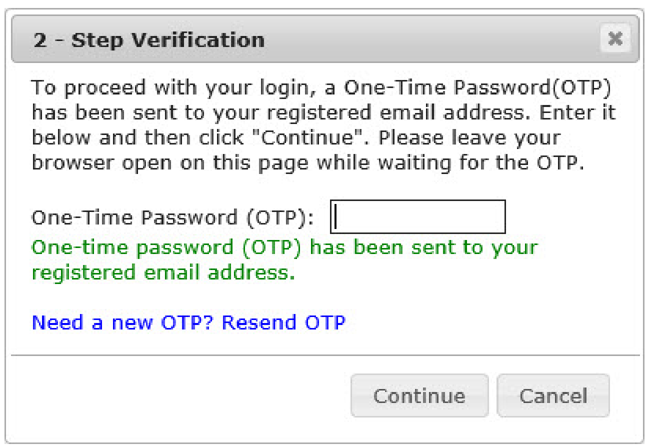


Enter the correct OTP to continue.

c. If the **user enters the maximum number of allowable attempts** for the OTP, the following message is displayed.



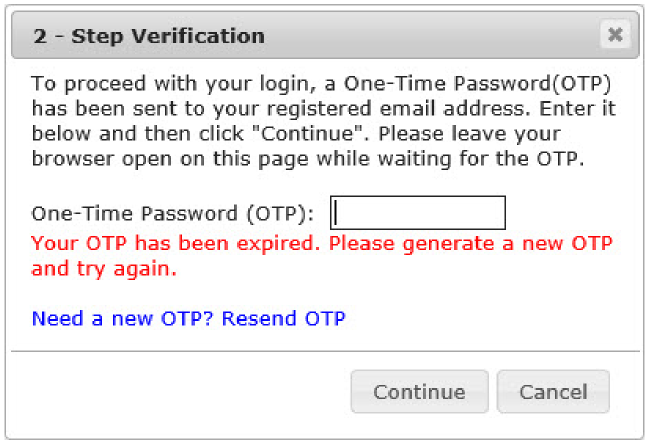
Select **Need a new OTP? Resend OTP** to generate another OTP. The following message is displayed.



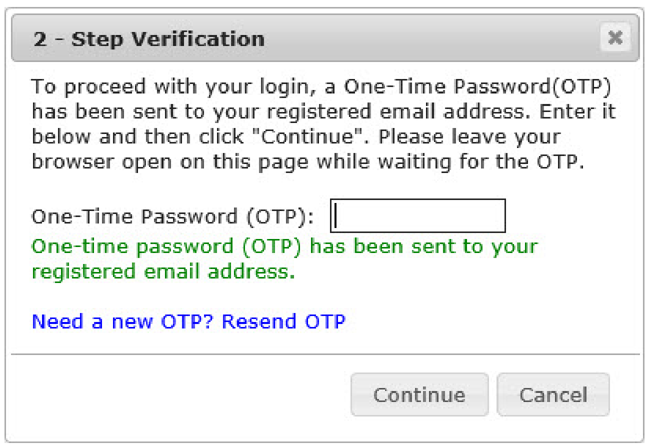
Enter the new OTP in the field.

Note: Retailers can set the number of maximum attempts that a user can enter the OTP. For more information, refer to *Setting up the OTP* on page 590.

d. If the **user enters an expired OTP**, the following message is displayed.



Select **Need a new OTP? Resend OTP** to generate another OTP. The following message is displayed.

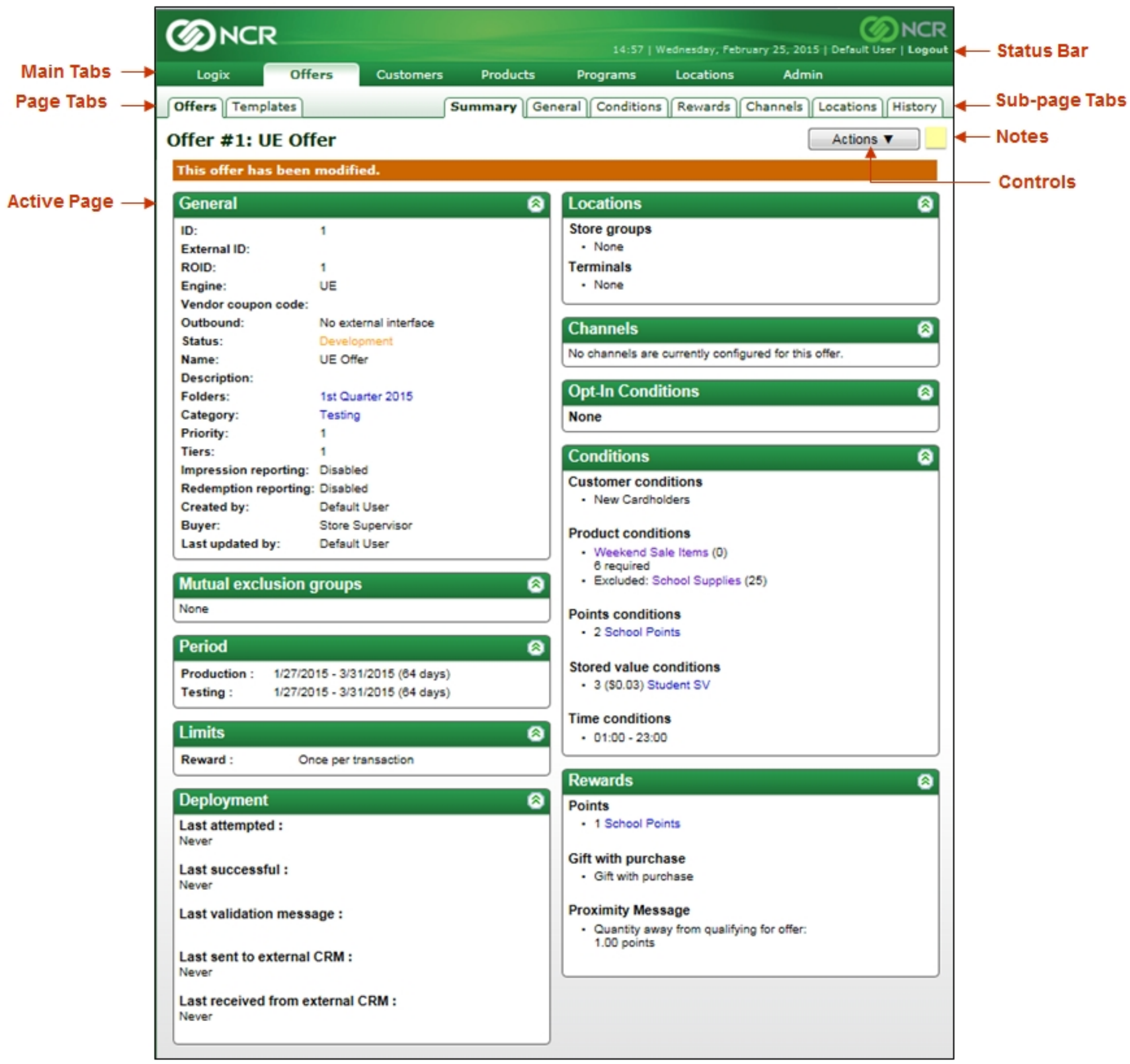


Enter the new OTP in the field.

Note: Retailers can set the number of minutes until the OTP expires. For more information, refer to *Setting up the OTP* on page 590.

Understanding the Logix User Interface

The Logix menu structure consists of Main tabs, Page tabs, and Sub–page tabs. Selecting any of these tabs or sub–tabs allows users to access a Logix function and perform specific tasks. The following window shows an example of the menu structure and certain functions of the Logix user interface:



Note: The application displays active tabs and functions depending on the accessed page and permissions of the current user. For more information about the permissions, refer to *Permissions* on page 839.

The following table describes the main tabs and functions of the Logix user interface:

Function/Tab	Description
Status Bar	Shows the time, the day of the week, the current user name, and the logout link.
Main Tab	Displays configuration details of offer elements and links to main functions of the Logix application.
Page Tab	Indicates a function or a series of functions under a Main tab. A Page tab is aligned to the left of the screen.
Sub–page Tab	Indicates a function or a series of functions under a Page tab. A Sub–page tab is aligned to the right of the screen.
Active Page	Indicates the content currently viewed by the user and displays summarized data in boxes that were collected from, and editable from their corresponding pages. It consists of Page tabs and Sub–page tabs. If the content does not fit on a single screen, a scroll bar is displayed at the right.
Controls	Indicates other functions that can be performed on a specific page depending on the permissions of the current user. **Example:** Search button, Save button, Delete button
Notes	Indicates that the user can make a note or see notes created by other users. For more information, refer to *Using the Notes Function* on page 703. **Note:** Not all pages have a Notes function.

Logs

Logix also maintains records of activities performed by an application. In Logix, an application performs a specialized function that supports the Advanced Marketing Solution (AMS). By default, log files show the activities of the current day.

To access log files, select the Logs button at the top of the Agents page or Connectors page. For a description of each application, refer to *Agents* on page 789. For a description of each log file, refer to *Log Files* on page 801.

Logix Main Tabs

The Logix main functions including the offer elements are indicated by a series of tabs below the Status Bar. Selecting a main tab displays the pages that consists of specific functions. This section describes each of the following tabs.

- Logix System Overview
- Offers Main Tab
- Customer Configuration
- Product Configuration
- Program Configuration
- Store Locations
- Administrative Functions

Logix System Overview

The Logix main tab displays an overview of the Logix system. Selecting the **Logix** main tab displays the Status page by default as shown in the following example:

The Logix tab consists of the following set of pages:

- **Status**—displays data about the state of the system.
- **About**—displays the application details and history.

Status Page

The Status page displays the following Page Summary Boxes:

Page Summary Box	Description
System Status	Displays a list of the number of items such as offers, groups, programs, terminals, and current Logix users. It also displays the number of deployed offers, customer groups, and product groups. Selecting an item name displays the corresponding page. • To create Offers, Folders, or Templates, refer to *Using the Offers Main Tab* on page 67. • To create Product groups, refer to *Defining Product Configuration* on page 415. • To create Stores, Store groups, or Terminals, refer to *Configuring Offer Locations* on page 509. • To create User Accounts, refer to *Configuring User Roles and User Accounts* on page 557. **Note:** Creating new items from the System Status section depends on the current user's permission settings.
User Status	Displays the current user's name, assigned roles, and recent activities. From this section, users can change their account settings such as name and password. To update user accounts, refer to *Configuring User Roles and User Accounts* on page 557.
System Notices	Indicates the status of several key features of Logix including agents, Sanity Check, IPL, Incentive Fetch, and Store Health: • **Green**—indicates that there are no problems related to the area. • **Red**—indicates that there may be an issue related to the area. This section also displays a list of offers or groups that have deployment–related errors. Selecting a hyperlink for a specific area displays the corresponding page.
Search	Allows users to search for items in Logix. To use this search function, refer to *Using the Search Function* on page 69.
Events	Displays a list of scheduled actions such as the start and end dates of offers, and a list of recent system activities.

About Page

Page Summary Box	Description
Installation	Displays the following information: • Machine information in which Logix is installed (name, host, url, IP address) • Status of the Logix databases • Server name • Version of the Phrase library
About	Displays the supported content, browser compatibility, conformance standards, and the NCR corporate links.
Contact	Displays contact information for the NCR AMS product.
Legal	Displays the copyright coverage of Logix.
Documentation	Displays the Logix User Guide.
Version history	Displays the Logix version that is installed in the system.

Offers Main Tab

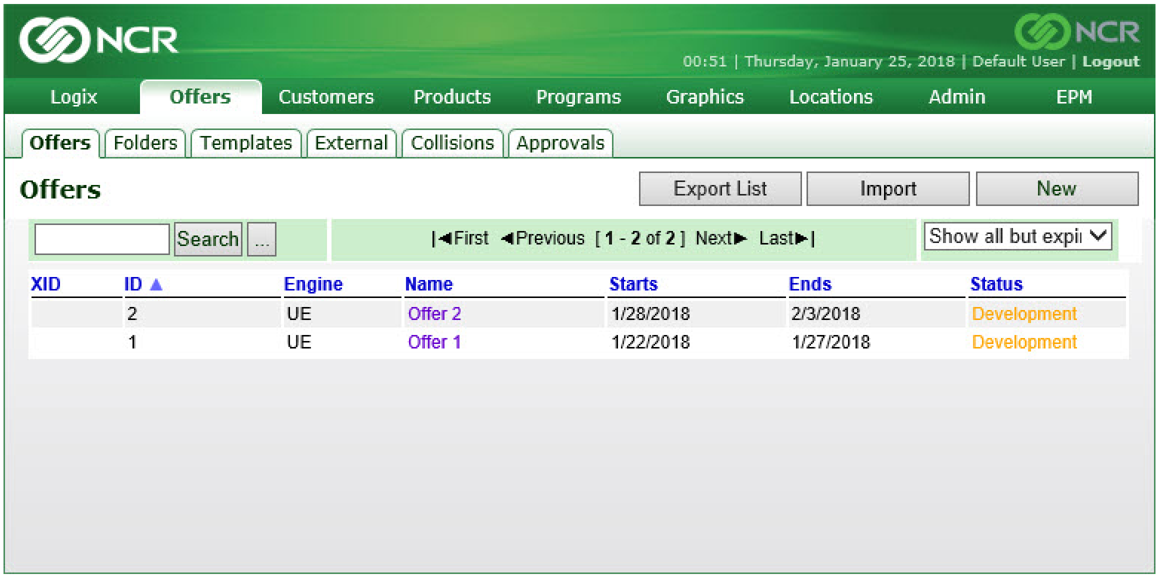
The Offers main tab displays a set of pages and tools that are used to create offers for a specific promotion engine. Selecting each page tab displays the corresponding page. For more information, refer to *Using the Offers Main Tab* on page 67.

The Offers main tab displays the Offers page by default and consists of the following set of pages:

Page	Description
Offers	Displays all existing offers in Logix. For more information, refer to *Offers* on page 154.
Folders	Displays a list of offers based on their arrangement in folders. For more information, refer to *Folders* on page 72.
Templates	Displays a list of offer templates. These templates have pre–set data that are sometimes used to help create offers. For more information, refer to *Offer Templates* on page 96.
External	Displays offers that were not generated in Logix. For more information, refer to *External Offers* on page 103.
Collisions	Displays a list of offers with corresponding collision detection reports that provide details about conflicting products in offers and options to resolve the conflicts. For more information, refer to *Collision Reports* on page 113.
Approvals	Displays a list of offers that are pending for approval and for which the current user is one of the approvers. **Note:** Only users who are assigned with the Offer Approval permission can access this page. For more information about this page, refer to *Approvals Page* on page 37.

Offers Page

Selecting the **Offers** main tab displays the Offers page by default.



The Offers page displays a list of existing offers with the following characteristics:

Column Heading	Description
XID	External Offer ID that is used to identify external offers.
ID	Offer ID that is used to identify offers created in Logix.
Engine	The promotion engine used with the offer.
Name	Name of the offer.
Starts	Start date of the offer.
Ends	End date of the offer.
Status	Describes the current status of an offer in the development process. The status can be any of the following types: • **Active**—indicates that the offer is "live" and in production. • **Development**—indicates that the current date is between the start and end dates of the offer, but it was not deployed or not active at any production locations. • **Testing**—indicates that the current date is between the testing start and end dates of the offer or the offer is only active in test locations. • **Scheduled**—indicates that the start dates of the testing and production periods are in the future. • **Expired**—indicates that the end date of the offer has passed.

Column Heading	Description
	Note: If the Offer Approval Workflow feature is enabled, the status of offers that are in Development changes to Editing, Pending Approval, or Approved based on the offer approval state. For more information, refer to *Offer Approval Workflow* on page 131.

From the Offers page, do any of the following:

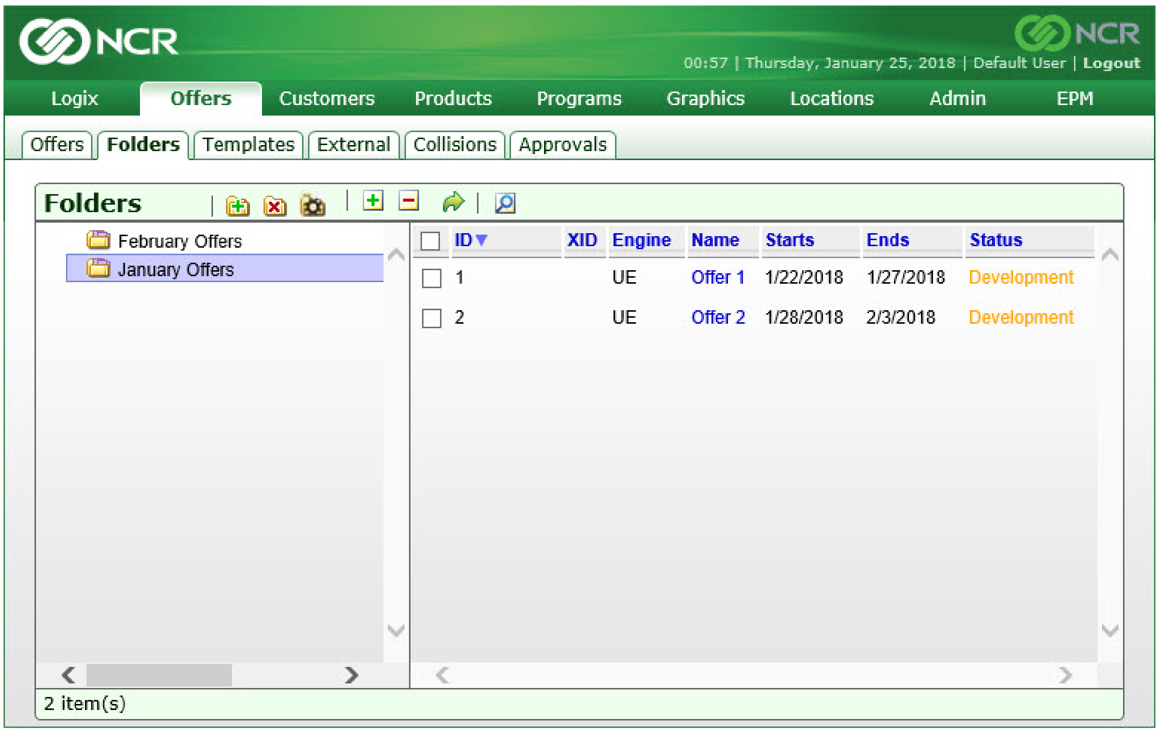
- Create new offers. For more information, refer to *Creating New Offers* on page 154.
- Import offer files. For more information, refer to *Importing Offer Files from Offers Page* on page 167.
- Export offers list. For more information, refer to *Exporting Offers List from Offers Page* on page 171.
- Search for offers. For more information, refer to *Using the Search Function* on page 69.

Folders Page

The Folders page is used as a container to group similar files. For example, an offer folder is created to group all July offers, or a folder for all offers that give discounts on paper products. For more information, refer to *Folders* on page 72.

Note: An offer can be in any number of different folders simultaneously, or can be in none.

Selecting the **Folders** page tab displays the Folders page.



The folders view is divided into two panes:

- **left pane**—displays the hierarchy of folders and sub–folders.
- **right pane**—displays the offers (if any) contained within the highlighted folder.

From the Folders page, do any of the following:

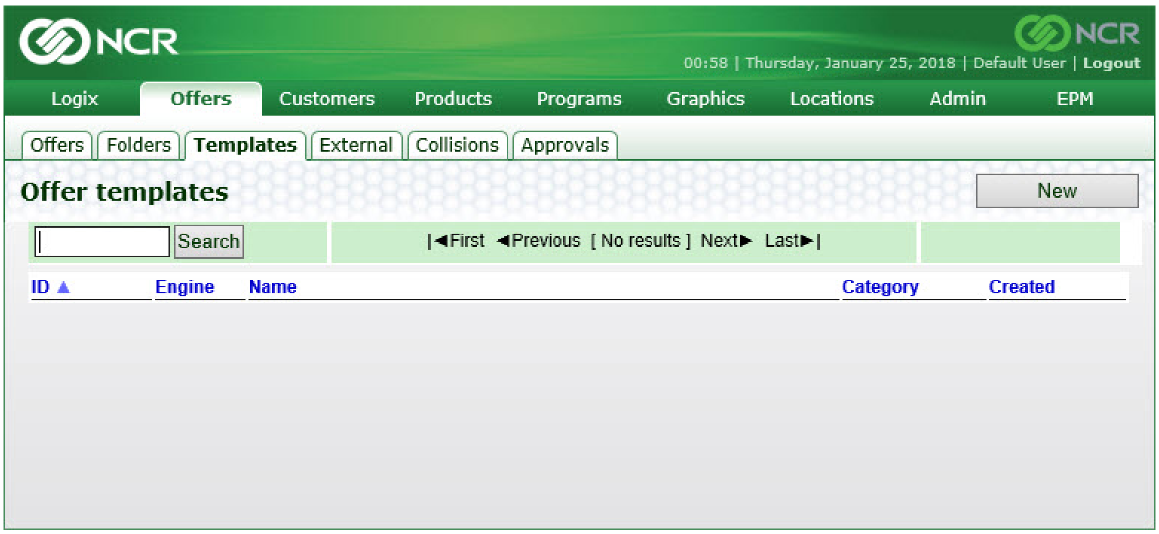
- Create folders. For more information, refer to *Creating Folders* on page 72.
- Modify folders. For more information, refer to *Modifying Folders* on page 74.
- Add offers to folders. For more information, refer to *Adding Offers to Folders* on page 78.
- Copy or transfer offers to other folders. For more information, refer to *Copying and Transferring Offers to Folders* on page 85.
- Remove offers from folders. For more information, refer to *Removing Offers from Folders* on page 80.
- Delete folders. For more information, refer to *Deleting Folders* on page 81.
- Search for offers. For more information, refer to *Searching for Offers* on page 75.

Offer Templates Page

Templates are semi–completed offers that help users create offers by only changing or adding values in certain fields. They permit users to create several different offers with similar characteristics.

Note: Unless otherwise noted, templates and regular offers have the same parameters. Template pages are indicated by a faint hexagonal background pattern.

Selecting the **Templates** page tab displays the Templates page.



The Offer Templates page displays a list of existing offer templates with the following characteristics:

Column Heading	Description
ID	Offer ID that is used to identify offer templates created in Logix.
Engine	The promotion engine used with the offer.
Name	Name of the Offer Template.
Category	Indicates an arbitrary group to which the offer template is assigned.
Created	The date the offer template was created.

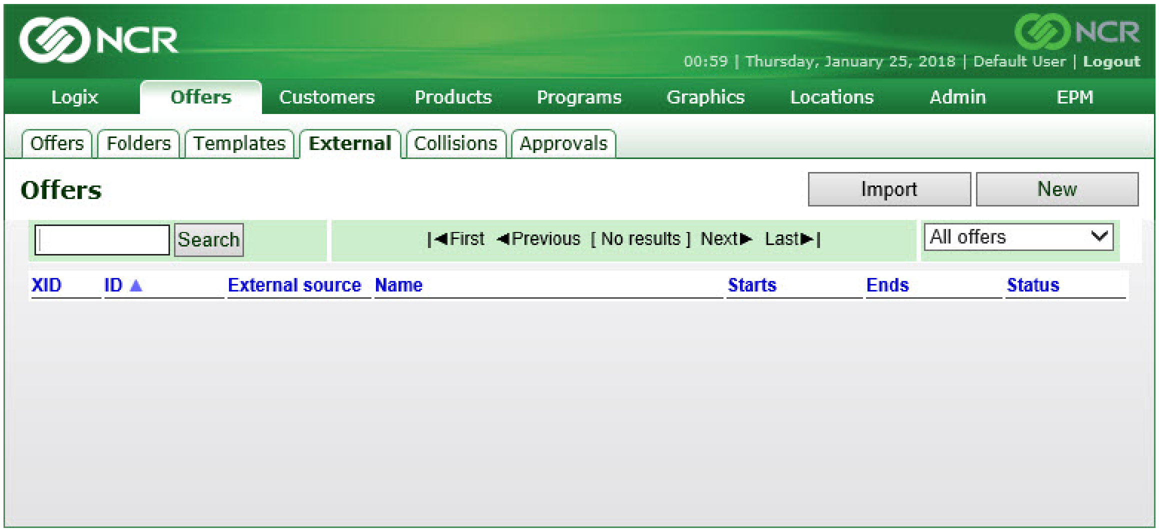
From the Offer Templates page, do any of the following:

- Create templates. For more information, refer to *Creating Templates* on page 97.
- Search for offer templates. For more information, refer to *Using the Search Function* on page 69.

External Offers Page

The External Offers page displays a list of offers created for or from third–party entities or external sources. It allows users to add, update, and retrieve offers to or from external sources using Logix. For more information, refer to *External Offers* on page 103.

Selecting the **External** page tab displays the External Offers page.



The External Offers page displays a list of offers with the following characteristics:

Column Heading	Description
XID	Identifies external offers.
ID	Identifies offers created in Logix.
External source	Indicates the third–party entity that created the offer.
Name	Indicates the name of the offer.
Starts	Indicates the start date of the offer.
Ends	Indicates the end date of the offer.
Status	Describes the current status of the offer in the development process. The status can be any of the following types: • **Active**–indicates that the offer is "live" and in production. • **Development**—indicates that the current date is between the start and end dates of the offer, but it was not deployed or not active at any production locations. • **Testing**—indicates that the current date is between the testing start and end dates of the offer or the offer is only active in test locations.

Column Heading	Description
	• **Scheduled**—indicates that the start dates of the testing and production periods are in the future. • **Expired**—indicates that the end date of the offer has passed.

Note: The list of offers are displayed based on the filter selected from the filter drop–down list.

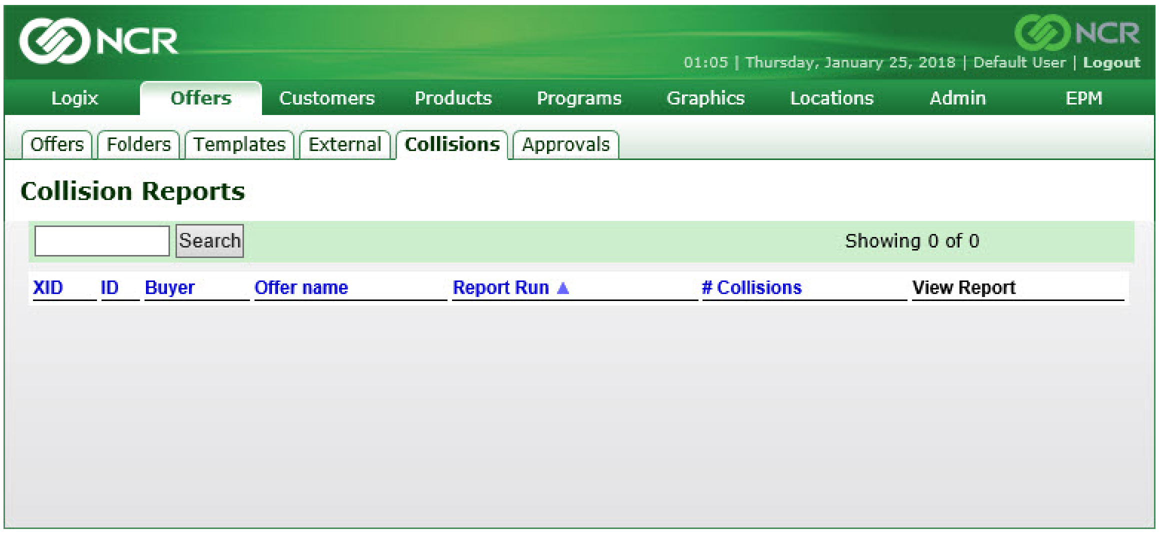
From the External Offers page, do any of the following:

- Create external offers. For more information, refer to *Creating External Offers* on page 104.
- Import external offer files. For more information, refer to *Importing Offer Files from External Offers Page* on page 106.
- Delete external offers. For more information, refer to *Deleting External Offers* on page 110.

Collision Reports Page

The Collision Reports page displays a list of offers that simultaneously affect the same products. It also displays links to the corresponding collision detection reports that provide details about conflicting products in the offers and, options to resolve the conflicts. To enable the Collision Detection feature, refer to *Enabling Collision Detection* on page 113.

Selecting the **Collisions** page tab displays the Collision Reports List page.



The Collision Reports page displays a list of offers with the following characteristics:

Column Heading	Description
External ID	Identifies external offers.
Logix ID	Identifies offers created in Logix.
Buyer ID	The buyer role with which the offer is associated. **Note:** If the user viewing the Collision Reports page is a buyer, only the offers created under the corresponding buyer role can be seen. To modify this feature, configure the **View offers regardless of Buyer association** permission. For more information, refer to *Configuring Role Permissions* on page 567.
Offer Name	Indicates hyperlinked offer names. Selecting an offer name displays the corresponding Offer Summary sub–page. For more information, refer to *Offer Summary Sub–page* on page 53.
Report Run	Indicates the date and time the collision report was generated.
# Collisions	Indicates the number of conflicting products.
View Report	If selected, displays the offer's corresponding collision report

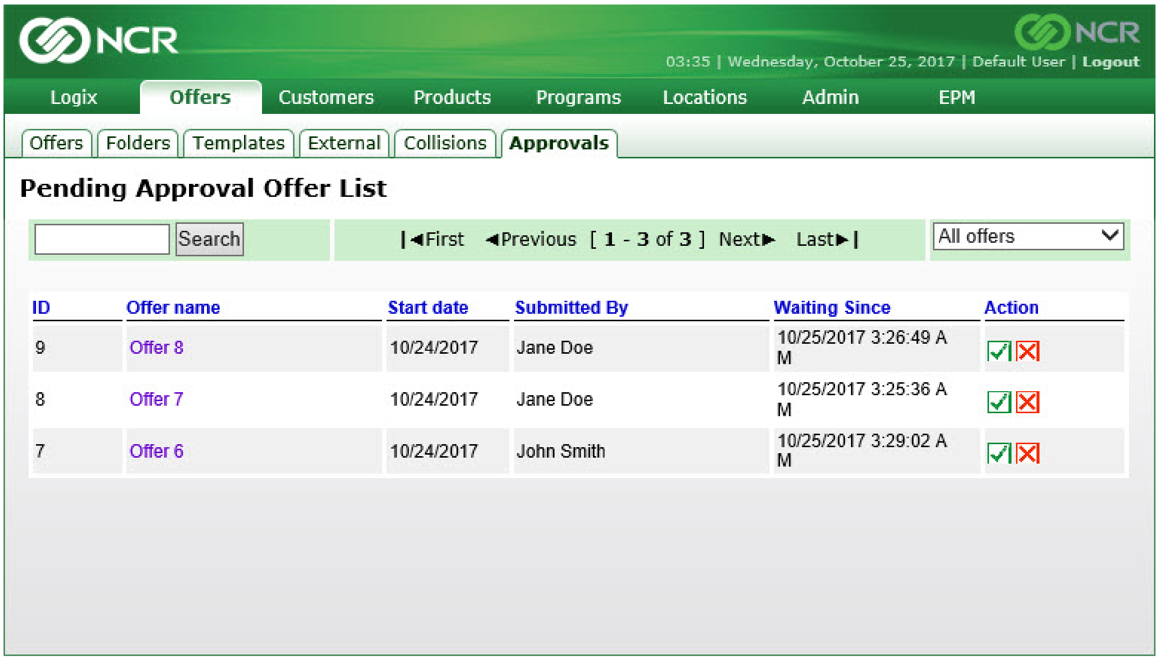
Column Heading	Description
	details. For more information, refer to *Accessing Collision Reports* on page 116.

Approvals Page

The Approvals page displays a list of offers that are pending for approval. The list displays only the offers for which the current user is one of the approvers.

Note: Only users who are assigned with the Offer Approval permission can access this page.

Selecting the **Approvals** page tab displays the Pending Approval Offer List page.



The Approvals page displays the following details of the offers with pending approval:

Column Heading	Description
Offer ID	Refers to the offer's unique ID.
Offer name	Refers to the offer's name. Clicking the hyperlinked offer name displays the corresponding Offer Summary sub-page.
Start date	Refers to the date when the offer was created.
Submitted By	Refers to the user who created the offer.
Waiting Since	Refers to the date and the time when the offer was submitted for approval.
Action	Displays the actions that the approver can do, which can be one of the following: • Approve • Reject • View Collision Report (This option is visible only if the offer has any collision.)

For information on approving offers, refer to *Offer Approval Workflow* on page 131.

Customer Configuration

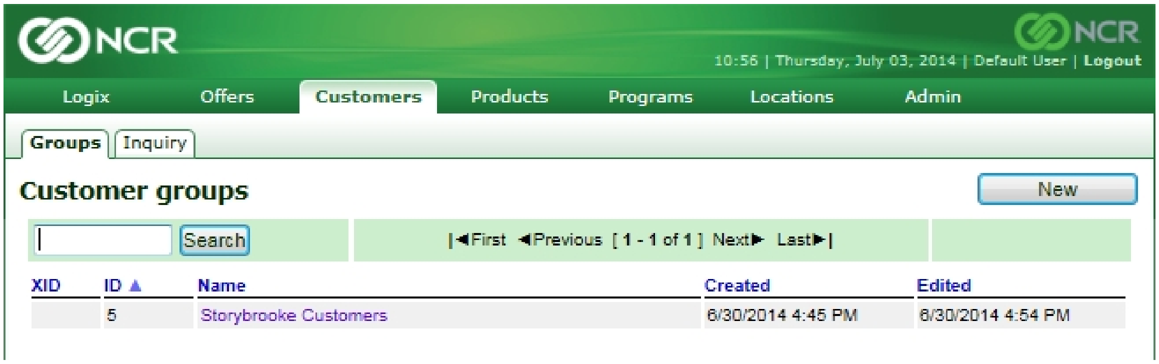
The Customers main tab displays a set of pages and tools that are used to create and manage individual customers, customer groups, and household. For more information, refer to *Defining Customer Configuration* on page 357.

The Customers main tab displays the Customer Groups page by default. It consists of the following set of pages:

Page	Description
Customer Groups	Displays details of a customer group, which is a collection of individual customer IDs or Household IDs. It permits users to define and maintain a customer group. The following characteristics define Customer Groups: • They can be used simultaneously in multiple offers. • They can persist without being used in any offers. **Note:** Customer IDs used in building offers can be part of a customer group. For more information, refer to *Creating Customer Groups* on page 360.
Customer Inquiry	Permits users to create and manage individual customers and households. A household is a group of customer IDs (often family members) that share offers, accumulations, and so forth. For more information, refer to *Performing Customer Inquiries* on page 367.

Customer Groups Page

Selecting the **Customers** main tab displays the Customer Groups page by default.



The Customer Groups page displays a list of existing customer groups with the following characteristics:

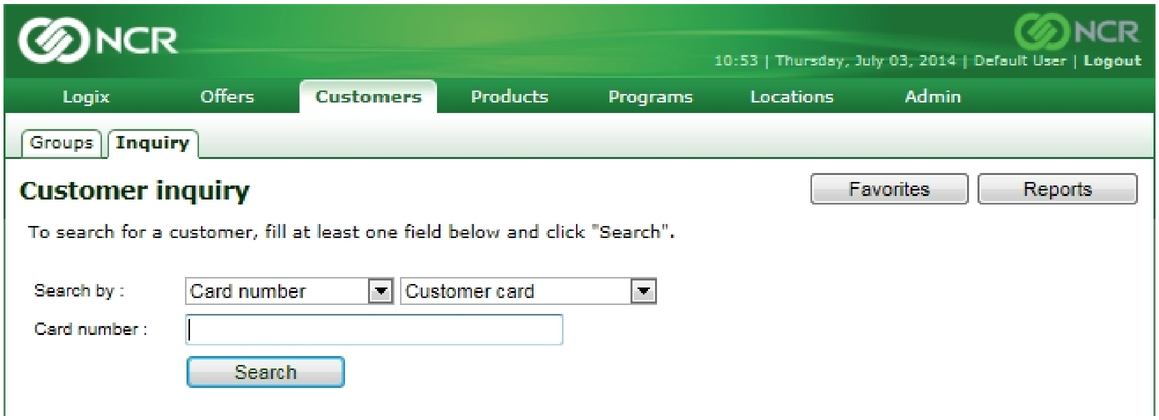
Column Heading	Description
XID	External Offer ID that is used to identify external offers.
ID	Offer ID that is used to identify offers created in Logix.
Name	Name of the Offer.
Created	The date and time the group was created.
Edited	The date and time the group was last edited.

From the Customer Groups page, do any of the following:

- Create customer groups. For more information, refer to *Creating Customer Groups* on page 360.
- Search for customer groups.

Customer Inquiry Page

Selecting the **Inquiry** page tab displays the Customer Inquiry page, as shown in the following example:



The Customer Inquiry page displays the following buttons:

Button	Description
Favorites	Links users to the Offer favorites for customer inquiry page. For more information, refer to *Favorite Offers* on page 399.
Reports	links users to the customer inquiry reports criteria generator page. For more information, refer to *Generating Adjustment Balance Reports* on page 402.

From the Customer Inquiry page, add and manage any of the following:

- **Customer information**. For more information, refer to *Adding Information for Individual Customers* on page 372.
- **Household information**. For more information, refer to *Adding Information for Households* on page 378.

Product Configuration

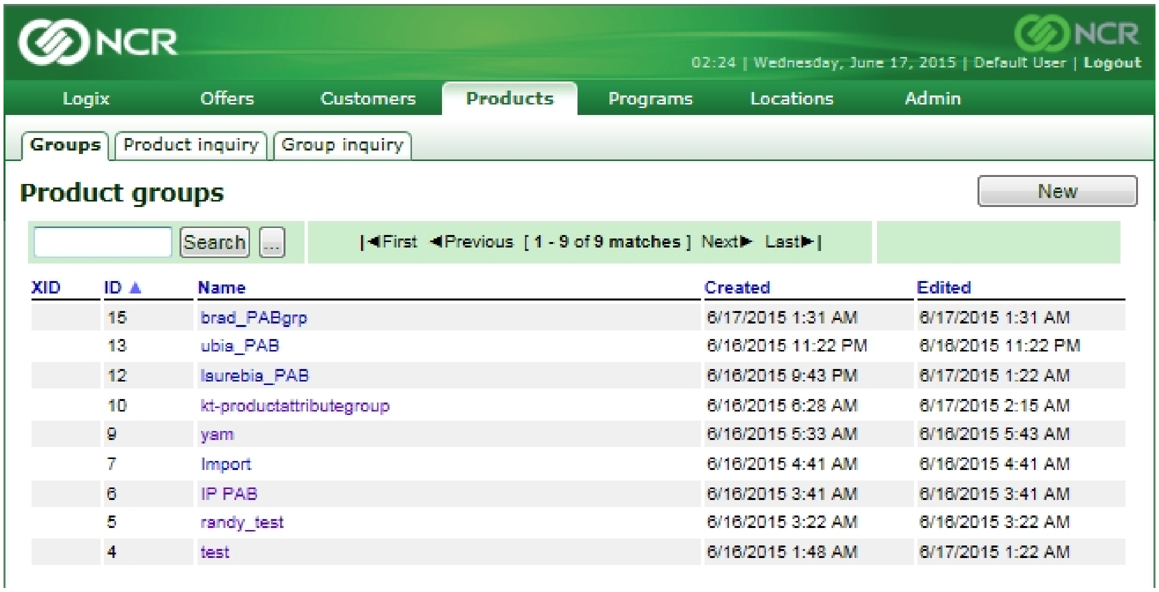
The Products main tab consists of a set of pages and tools that are use to define and maintain details of a single product or a product group. For more information, refer to *Defining Product Configuration* on page 415.

The Product main tab displays the Product Groups page by default. It consists of the following set of pages:

Page	Description
Product Groups	Displays details of each product group. For more information, refer to *Accessing Product Records* on page 417.
Product Inquiry	Displays details of how and where a specific product is used in Logix. For more information, refer to *Using the Product Inquiry Page* on page 482.
Product Group Inquiry	Displays details of all the UPC in a specified group instead of a single UPC. For more information, refer to *Using the Product Group Inquiry Page* on page 483.

Product Groups Page

Selecting the Products main tab displays the Product Groups page by default.



The Product Groups page displays a list of existing customer groups with the following characteristics:

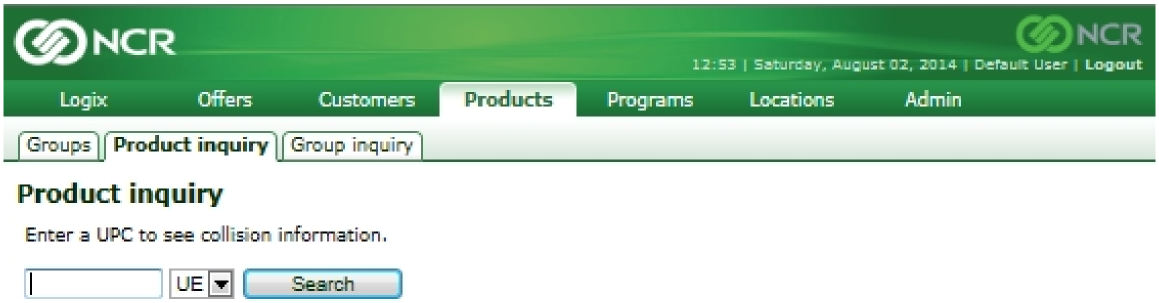
Column Heading	Description
XID	External Offer ID that is used to identify external offers.
ID	Offer ID that is used to identify offers created in Logix.
Name	Name of the offer.
Created	The date and time the group was created.
Edited	The date and time the group was last edited.

From the Product Groups page, do any of the following:

- Create standard product groups. For more information, refer to *Creating Standard Product Groups* on page 418.
- Create attribute–based product groups. For more information, refer to *Creating Attribute–Based Product Groups* on page 438.
- Search for product groups to display the corresponding Product Group Edit sub–page.

Product Inquiry Page

From the Products tab, selecting the **Product Inquiry** page tab displays the Product Inquiry page.

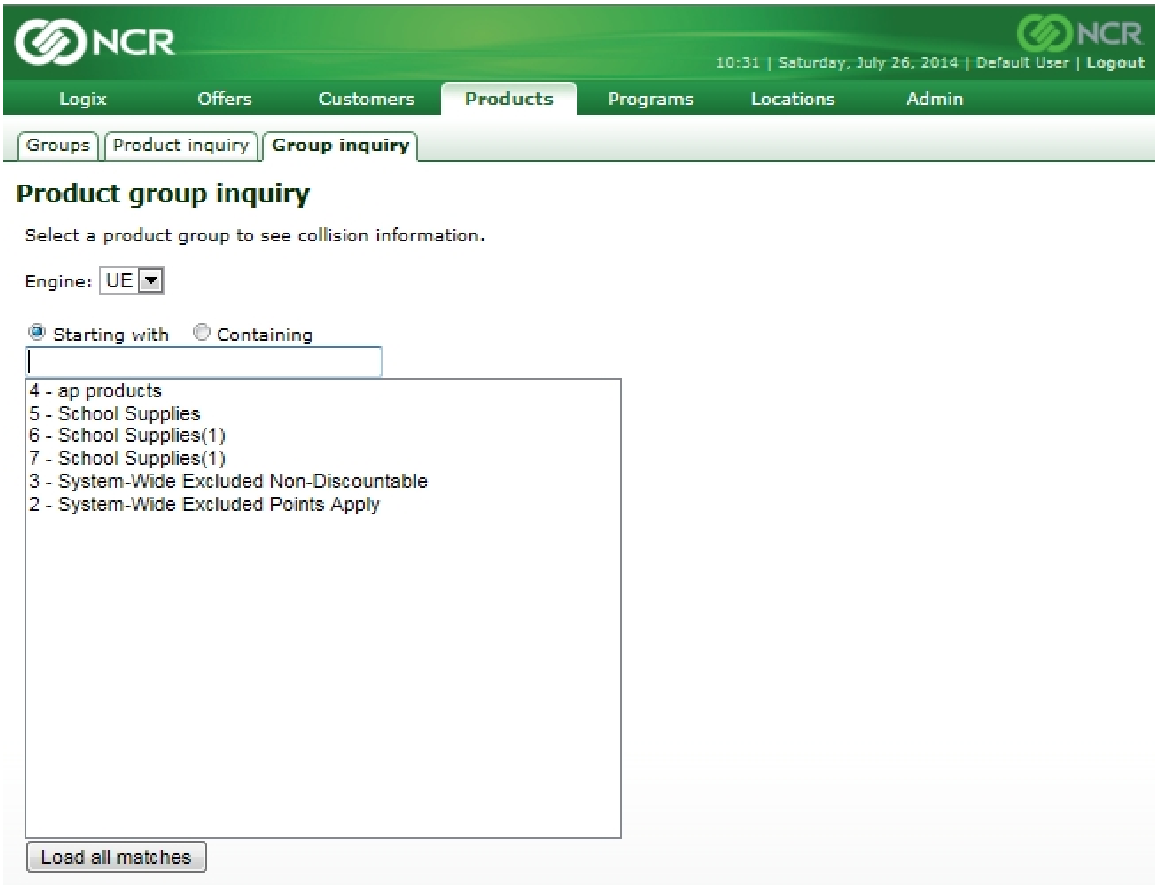


Note: If Logix is installed with multiple promotion engines, they are listed as options in the drop–down list.

Universal Product Code (UPC) is a type of Product ID representing individual products. For more information, refer to *Using the Product Inquiry Page* on page 482.

Product Group Inquiry Page

From the Products tab, selecting the **Group Inquiry** page tab displays the Product Inquiry page.



Note: If Logix is installed with multiple promotion engines, they are listed as options in the drop–down list.

For more information, refer to *Using the Product Group Inquiry Page* on page 483.

Program Configuration

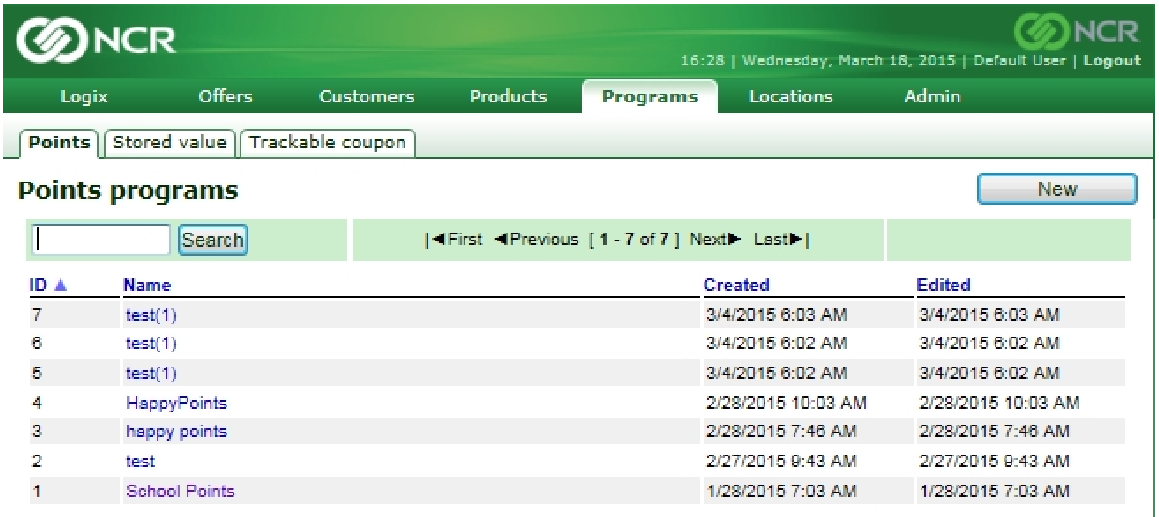
The Programs main tab consists of a set of pages and tools that are used to create arbitrary units of currency like airline miles, cereal points, and so forth. For more information, refer to *Defining Program Configuration* on page 485.

The Programs main tab displays the Points Program page by default. It consists of the following set of pages:

Program	Description
Points	A class of points used for a specific purpose. **Example:** A retailer creates a Fuel Points program to grant points to customers whenever they purchase gasoline, or a Bread Points program to encourage shoppers to visit the bakery.
Stored Value	A collection of units that customers can earn and redeem. Each unit is associated with a particular value such as a dollar amount.
Trackable Coupon	Limits the number of times a particular coupon can be used within an offer.

Points Program Page

Selecting the Programs main tab displays the Points Program page by default.



The Points programs page displays a list of existing programs with the following characteristics:

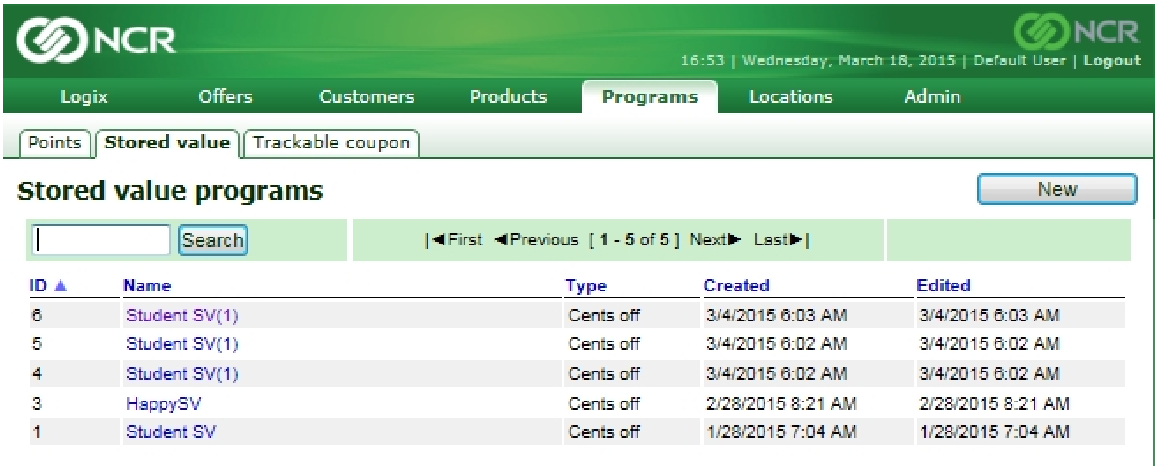
Column Heading	Description
ID	The points program ID.
Name	Name of the points program.
Created	The date and time that the program was created.
Edited	The date and time that the program was last edited.

From the Points programs page, do any of the following:

- Create a points program. For more information, refer to *Creating Points Programs* on page 488.
- Search for points programs.

Stored Value Program Page

Selecting the **Stored value** page tab displays the Stored value programs page.



The Stored value programs page displays a list of existing stored value programs with the following characteristics:

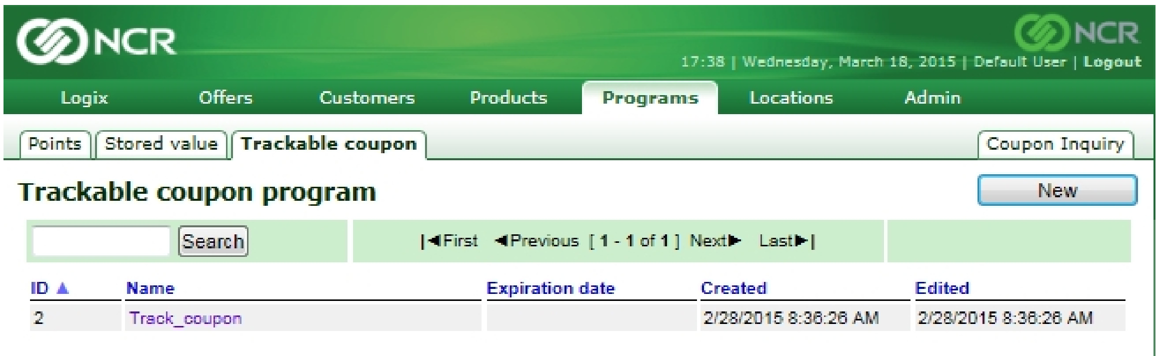
Column Heading	Description
ID	The stored value program ID.
Name	Name of the stored value program.
Type	Displays the type of stored value that the program represents.
Created	The date and time that the program was created.
Edited	The date and time that the program was last edited.

From the Stored value programs page, do any of the following:

- Create a stored value program. For more information, refer to *Creating Stored Value Programs* on page 496.
- Search for the stored value programs.

Trackable Coupon Program Page

From the Trackable Coupon Program page, select a trackable coupon program name. The Trackable Coupon Program Configuration page is displayed, as shown in the following example:



The Trackable coupon value program page displays a list of existing trackable coupon programs with the following characteristics:

Column Heading	Description
ID	The trackable coupon program ID.
Name	Name of the trackable coupon program.
Expiration date	The expiry date of the program.
Created	The date and time that the program was created.
Edited	The date and time that the program was last edited.

From the Trackable Coupon Program page, do any of the following:

- Create a trackable coupon program. For more information, refer to *Creating Trackable Coupon Programs* on page 504.
- Search for trackable coupon programs.

Store Locations

The Locations main tab consists of a set of pages and tools that are used to define and maintain details of stores where offers are delivered. For more information, refer to *Configuring Offer Locations* on page 509.

Selecting the Locations main tab displays the following set of pages:

Page	Description
Store Groups	Displays a list of store groups. For more information, refer to *Accessing Store Group Configuration* on page 523. **Note:** Selecting the Locations main tab displays the Store Groups page by default.
Stores	Displays a list of stores. For more information, refer to *Accessing Store Configuration* on page 511.
Servers	Similar to stores, but rather than being associated with a particular location, they operate at the enterprise level and may service multiple retail locations. For more information, refer to *Accessing Server Configuration* on page 539.
Terminal Sets	Displays terminal set details. For more information, refer to *Accessing Terminal Set Configuration* on page 544.
UOM Sets	Permits users to specify types of units of measure in each location. For more information, refer to *Accessing UOM Set Configuration* on page 549. **Note:** If this feature is disabled, enable the "Enable multi unit of measure for UE" option. For more information, refer to *Localization Options* on page 737.

Administrative Functions

The Admin main tab consists of a set of pages and tools that are used to perform administrative tasks and functions. For more information, refer to *Using Administrative Functions* on page 595.

The Admin main tab consists of the following set of pages:

Page	Description
Agents	Displays a list of applications that run the Web server hosting Logix. For more information, refer to *Agents* on page 789.
Connectors	Displays a list of Web service files that are accessed using HTTP. For more information, refer to *Web Service Files* on page 809.
Configuration	Displays buttons that correspond with configuration items that cannot be controlled by non–administrative users. For more information, refer to *Configuration* on page 610.
Offer Health	Displays a summary of offer status particularly those that are identified as potentially problematic. For more information, refer to *Offer Health* on page 671.
Server Health	Displays server–related and performance–related information about stores that are associated with the default promotion engine. For more information, refer to *Server Health* on page 676.
Reports	Permits users to create reports that display detailed information about the performance of an offer. For more information, refer to *Generating Performance Reports* on page 701.
Users	Permits users to perform administrative tasks such as creating and modifying user accounts. For more information, refer to *Configuring User Roles and User Accounts* on page 557.

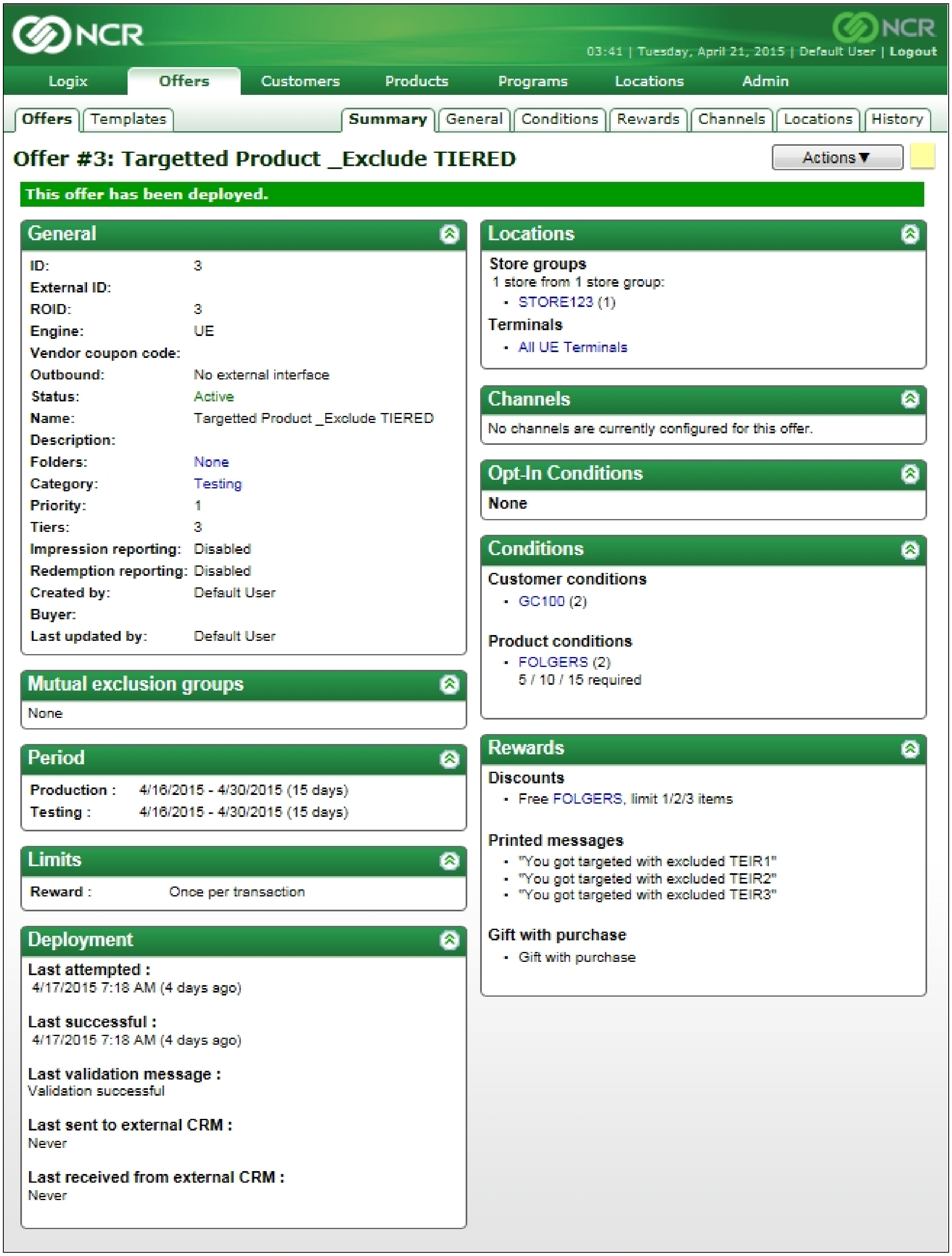
Logix Offer Builder Sections

Selecting an offer from the Offers page displays the Logix Offer Builder showing the sections that define an offer. These sections are accessible using the sub–page tabs in the Offer Builder. Refer to the following table for a description of each sub–page tab in the Logix Offer Builder:

Sub–page Tab	Description
Summary	Displays condensed data that are collected from each of the Offers sub–pages and organizes them in corresponding boxes. For more information, refer to *Offer Summary Sub–page* on the facing page. **Note:** Selecting an offer from the Offers page displays the corresponding Offer Summary sub–page by default.
General	Displays the offer configuration. For more information, refer to *Offer Configuration Sub–page* on page 56.
Conditions	Displays the conditions that are included in an offer. For more information, refer to *Offer Conditions Sub–page* on page 61.
Rewards	Displays the rewards that are included in an offer. Rewards are those things that are granted, or actions that are performed, when an offer's conditions are met. For more information, refer to *Offer Rewards Sub–page* on page 63.
Channels	Permits users to distribute offer data to different channels to notify customers of upcoming and existing offers. For more information, refer to *Offer Channels Sub–page* on page 64.
Locations	Displays the locations where offers are available. For more information, refer to *Offer Locations Sub–page* on page 65.
History	Displays details of all offer–related activities. For more information, refer to *Offer History Sub–page* on page 66.

Offer Summary Sub–page

The Summary page displays condensed data that are collected from each of the Offers sub–pages and organizes them in corresponding boxes. By default, selecting an offer name in the Offers page displays the Offer Summary sub–page.



Controls

This section describes other functions that can be performed from the Actions drop–down list on the Offer Summary sub–page .

Note: Available functions depend on the permissions of the current user.

Function	Description
Assign folders . . .	Allows users to organized offers into folders to help find and maintain sets of offers. For more information, refer to *Offers* on page 154. **Note:** An offer does not need to be in any folder. But, it can also be simultaneously in multiple folders.
Copy offer	Creates a copy of the current offer. For more information, refer to *Copying Offers* on page 157. **Note:** The new offer is identical to the original, except that a number placed in parentheses is prepended to the name to indicate the number of times the offer was copied.
Defer deployment	Defers the offer deployment to a later period. By default, deployment is deferred by one day.
Deploy	Indicates that the system 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 the deployment offer. After it is processed by the agent, the offer is deployed and remains in that status until either modified or expired. For more information, refer to *Deploying Offers* on page 177.
Export	Exports the offer configuration from Logix into an XML file contained in a GZip for importing to a later date or to another Logix system. For more information, refer to *Exporting Offers List from Offers Page* on page 171.
New	Creates a new offer. For more information, refer to *Creating New Offers* on page 154.
Save as template	Saves the offer as a template. For more information, refer to *Creating Offer Templates from Offers* on page 163.
Delete	Deletes an offer. For more information, refer to *Deleting Offers* on page 184.
Run Collision Detection	Displays the Product collisions pop–up window with options that determine if there are colliding products for the offer.

Function	Description
	Note: This option is disabled if the Collision Detection feature is disabled for the offer. For more information, refer to *Enabling Collision Detection* on page 113.
View Collision Report	Displays the Offer Collision Report details page. **Note:** This option is disabled if there is no collision report or if the Collision Detection feature is disabled for the offer. For more information, refer to *Enabling Collision Detection* on page 113.

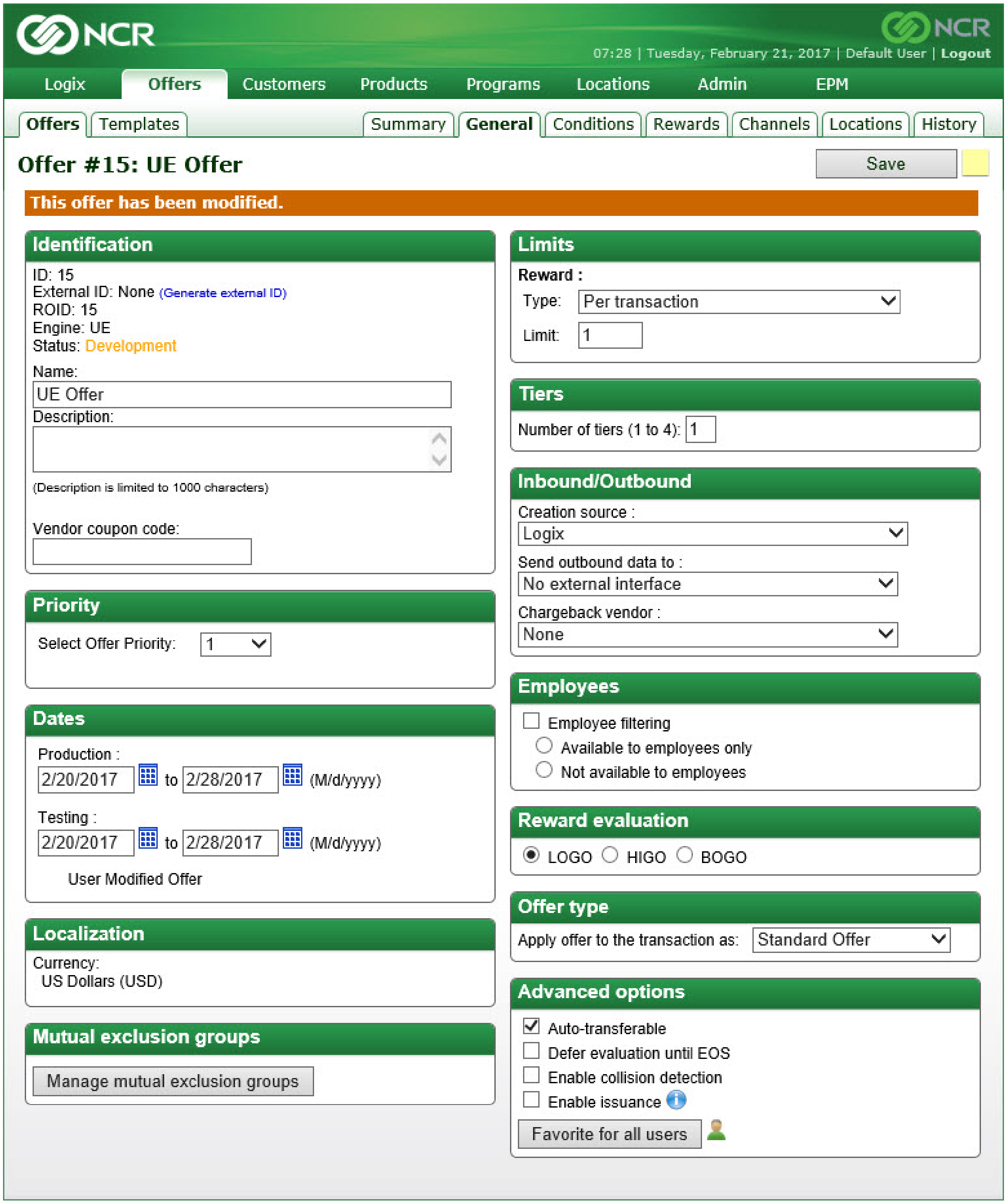
Page Summary Boxes

Except for the Deployment Summary Box, each Page Summary Box displays summarized data collected from, and editable from, the other Offers sub–pages. For more information, refer to *Using the Logix Offer Builder* on page 145.

Page Summary Box	Description
General	Displays an overview of the offer configuration.
Mutual Exclusion Groups	Indicates that products in the group cannot be used in any offer conditions or rewards.
Period	Indicates the period when the offer is publicly available to its target customers.
Limits	Indicates the frequency of the offer's availability to customers.
Deployment	Only displays result summaries of the offer deployment and shows when it was last attempted, when it was last successful, and the latest status.
Locations	Displays the store or terminal the offer is available to customers.
Channels	Displays the channels in which the offer is advertised.
Opt–In Conditions	Displays the eligibility conditions configured for the offer.
Conditions	Displays the offer conditions that control the availability of offers to customers.
Rewards	Displays the things that are granted or actions that are performed when offer conditions are met.

Offer Configuration Sub–page

The offer configuration is displayed in the General sub–page, which allows users to define the characteristics of an offer. Selecting the **General** sub–page tab displays the Offer Configuration sub–page.



Configuration Parameter Boxes

Refer to the following table for a description of each parameter that defines the characteristics of an offer:

Parameter Name/Box	Description
Identification	Displays the following details of the offer that you can modify: • **Name**—limited to 50 characters. • **Description**—indicates the nature of the offer, its purpose, and so forth. • **Vendor Coupon Code**—specifies a code of up to 20 characters indicating that the offer is associated with a particular coupon. The following are the details that you cannot modify: • ID • External ID • ROID • Engine • Status
Priority	Determines which offers are exclusive of one another. If a level is not selected, the default level configured in the database is used. **Example:** There are two offers, one has priority level 30, and the other has priority level 60. The UE processes offers based on priority—it processes the offer with the highest priority first. In this example, the offer with priority level 30 is processed first. **Note:** Priority levels are defined in the Logix database. To modify or customize these levels, contact an NCR Professional Services Representative.
Dates	Indicates either of the following periods: • **Production**—the period when the offer is publicly available to its target customers. • **Testing**—the period during which the offer is active in testing locations. **Note:** The dates must be in the format MM/DD/YYYY (month/day/year). Dates can be entered by selecting the calendar icon next to the input box.

Parameter Name/Box	Description
Localization	Allows users to select a currency for the offer's conditions and rewards, and unit of measure for an offer's conditions.
Mutual Exclusion Groups	Indicates that products in the group cannot be used in any offer conditions or rewards. For more information, refer to *Mutual Exclusion Groups* on page 644.

Limits	(Reward) Controls the frequency at which the reward is made available. For instance, a reward can be available once per transaction or no limit at all. The following are the possible options:
	• **Days (rolling)**—indicates that the reward can be used for a specified number of times in a specified number of days. Selecting this option displays the following fields:
	  • **Limit**—number of times the reward can be used within the period.
	  • **Period**—number of days that constitutes a single period. Within a period, the reward may be used up to the specified limit. After a period ends, the number of times a reward has been used is reset to zero.
	Example: If the reward Limit is set to 2 and the period is 5 days, the reward can be used only twice within a period of 5 days. If the reward has been used twice on the 3rd day, the reward cannot be used anymore within the 5–day period. When the period ends, the number of times the reward was used is reset from 2 to zero (0). The reward can then be used again (with a limit of 2) for the next 5–day period.
	• **Per transaction**—indicates that the reward can be used for a specified number of times for every transaction. Selecting this option displays the **Limit** field, where retailers can enter the number of times a reward can be used per transaction.
	• **No limit**—indicates that using the reward has no limit.
	• **Once per offer**—indicates that the reward can be used only once per offer, when the offer condition is first met.

Tiers	Indicates a tiered offer, which allows multiple "levels" of condition and reward, each with its own unique values.

Parameter Name/Box	Description
	Example: Spend $2 and get x, but spend $3 and get y. The tier level set for this offer is 2. **Note:** NCR recommends four tiers as the practical limit.
Inbound/Outbound	Permits users to do the following: • Indicate where the offer originated and where outbound data from the offer are sent. For more information, refer to *Creating External Offer Sources* on page 626. **Example:** An offer generated in Logix is labeled "Creation source: Logix," and may be configured to send data to Teradata CRM. • Specify the vendor against which the offer should be charged. For more information, refer to *Creating Chargeback Vendors* on page 664.
Employees	Enabling employee filtering specifies whether the offer is available only to employees or only to non–employees. The determination of whether a customer is an employee is based on information from the customer's account.
Reward Evaluation	Indicates how the discounts earned are evaluated. • **HIGO** (Highest Item Gets the Offer)—the highest priced items receive the discount. • **LOGO** (Lowest Item Gets the Offer)—the lowest priced items receive the discount. • **BOGO** (Buy One Get One)—the lowest priced items receive the discount.

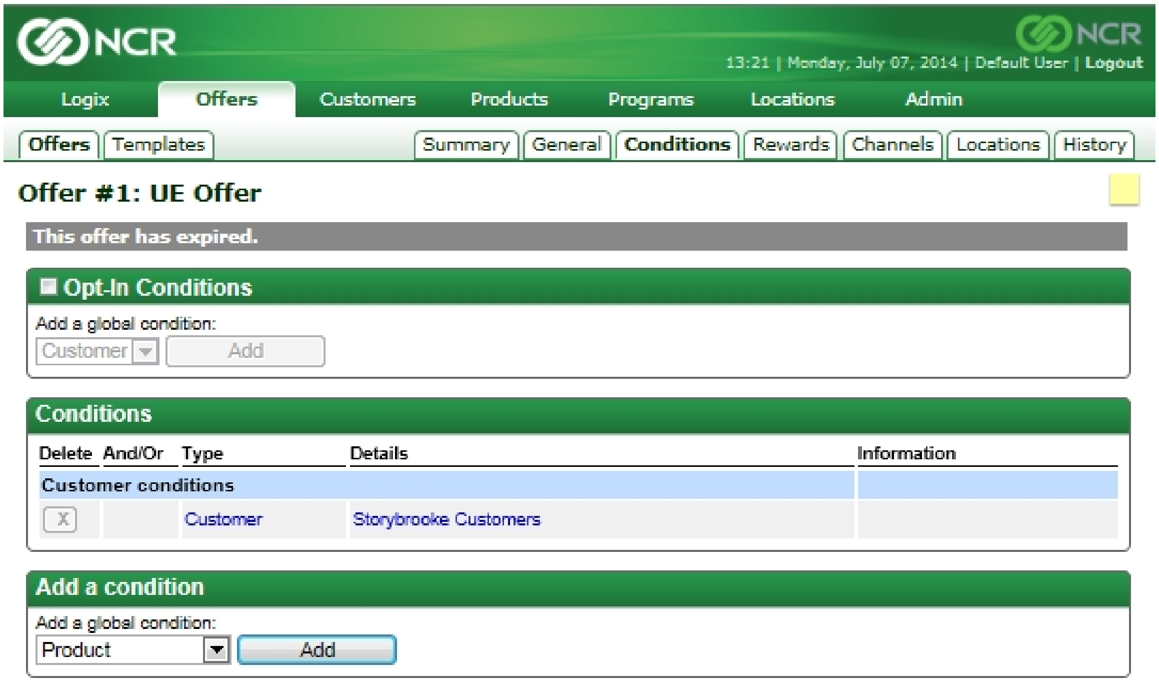
Offer type	Provides the following setting:
	• **Apply offer to the transaction as**—determines how the offer is applied to a transaction. The following are the available options:
	  • **Standard Offer**—the offer is treated as a standard Logix offer. This option is the default value.
	  • **Manufacturer Coupon**—the offer is treated as a digital manufacturer coupon.
	  • **Store Coupon**—the offer is treated as a digital store coupon.
	For information about digital coupons, refer to *Using Digital Coupons* on page 750.

Advanced Options	Provides the following options:

Parameter Name/Box	Description
	• **Auto–transferable**—if selected, the offer can be transferred from an individual customer to a household. • **Defer evaluation until end of sale (EOS)**—if selected, the offer is not applied until the end of a transaction. • **Enable collision detection**—if selected, deployed offers undergo collision detection processing. • **Favorites**—marks the offer as a favorite for all Logix users.

Offer Conditions Sub–page

The Conditions sub–page displays the conditions that are currently included in the offer. Selecting the **Conditions** sub–page tab displays the Conditions sub–page.



Note: Offers can be controlled by several separate types of conditions: customer, product, points, tender, time, day, trigger codes, and preferences. Some condition types can appear only once within an offer. Others can appear multiple times. For more information, refer to *Offer Conditions* on page 193.

The Conditions sub–page tab displays the following data:

Column Heading	Description
Delete	Deletes the condition.
And/Or	Indicates that the offer has multiple product conditions, which are joined by a Boolean relationship that controls the manner in which Logix considers these conditions to be met. **Example:** An offer has 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," anyone receiving the offer must purchase an item from Group A and one from Group B. But, if the conditions were linked by an "or" then, buying Group A item *or* a Group B item would qualify the customer to receive the offer. **Note:** By default, Logix links these multiple conditions with the "and" relationship. Selecting **and** changes it to **or**.
Type	Indicates the condition type.
Details	Displays the name of a specific condition.
Information	Displays details of the specific condition. **Example:** If a product condition has a unit value set to Items with required quantity of 2, this columns displays "2 required." For tiered offers, this column displays information on the condition of each tier level.

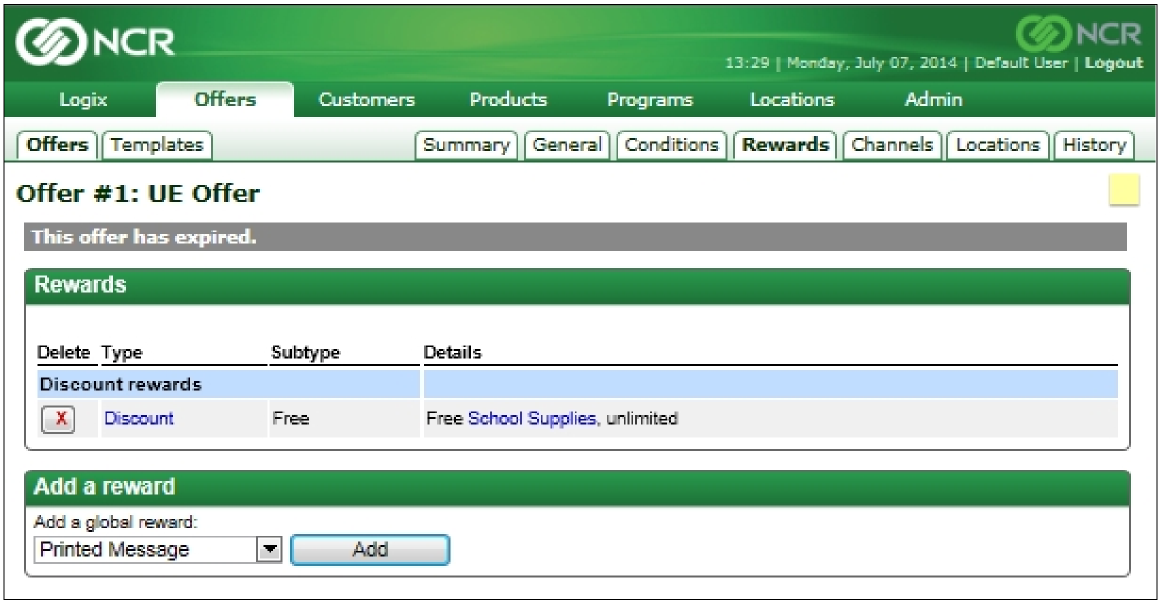
Condition Categories

Offer conditions in Logix have the following categories:

- **Eligibility Conditions**—controls who are eligible to opt–in and opt–out of an offer shown on an external customer touch point such as a Retailer's website. For more information, refer to *Eligibility Conditions* on page 249.
- **Offer Conditions**—controls the availability of offers to customers using offer condition types. For more information, refer to *Offer Conditions* on page 193.

Offer Rewards Sub–page

The Rewards sub–page displays the rewards that are currently included in the offer. Rewards are things that are granted or actions that are performed, when an offer's conditions are met. Examples of rewards include discounts, points, and coupons. Selecting the **Rewards** sub–page tab displays the Rewards sub–page.



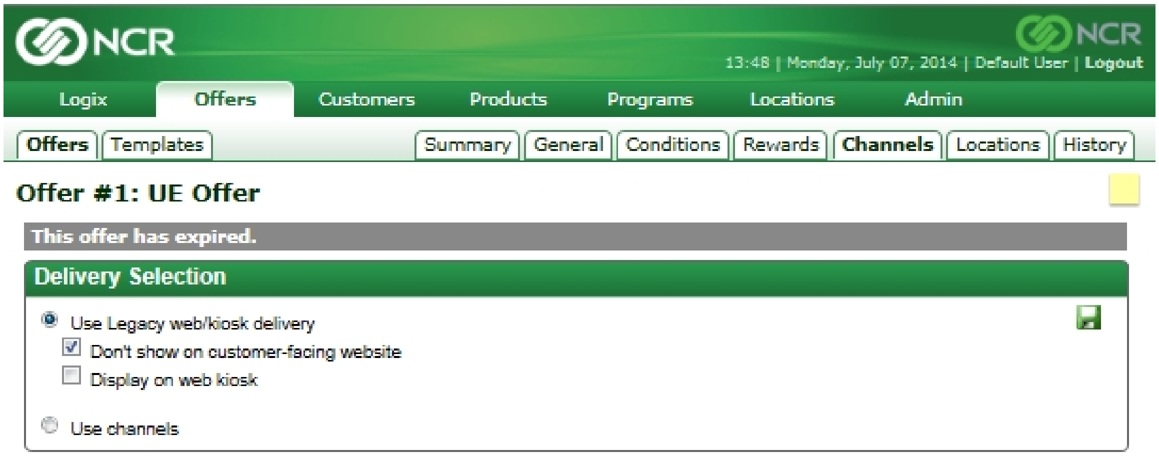
The Rewards sub–page tab displays the following data:

Column Heading	Description
Delete	Deletes a reward.
Type	Displays the reward type in hyperlink. Selecting the hyperlink displays the details of the reward.
Subtype	Displays the applicable subtype of the reward.
Details	Displays specific information about the reward. For tiered offers, this column displays information on the reward of each tier level.

For more information, refer to *Offer Rewards* on page 261.

Offer Channels Sub–page

The Channels sub–page allows users to distribute the UE offer data to different channels to notify customers of upcoming or existing offers. Selecting the **Channels** sub–page tab displays the Channels sub–page.

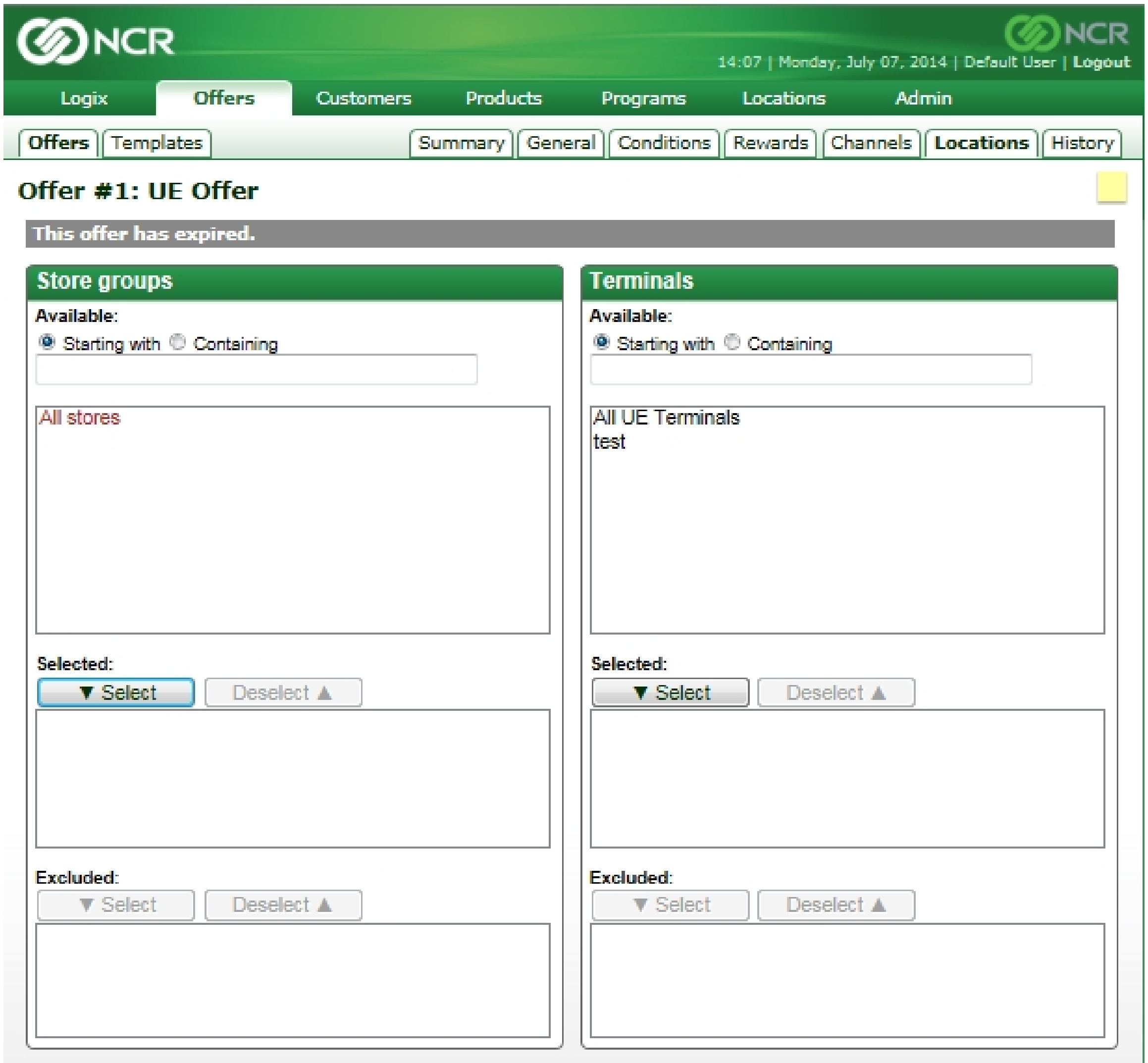


The Channels sub–page displays the following offer delivery methods:

Offer Delivery Method	Description
Legacy web/kiosk delivery	Allows retailers using an existing Logix system or a Logix system using a version older than version 5.19 to advertise offers through a website or kiosk.
Channels	Allows retailers using Logix version 5.19 and above to advertise offers through a website, kiosk, or POS. For more information, refer to *Offer Channels* on page 339.

Offer Locations Sub–page

The Locations sub–page allows users to select which store or terminal the UE offer becomes available to customers. Selecting the **Locations** sub–page tab displays the Locations sub–page.

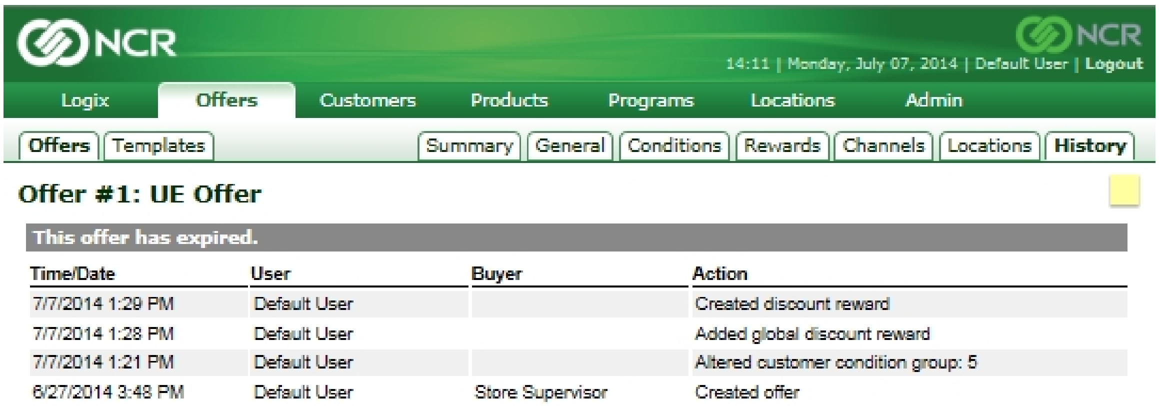


The Locations sub–page displays the following sections:

Page	Description
Store Groups	Allows users to make offers available to stores in a particular group. For more information, refer to *Creating Store Groups* on page 525.
Terminals	Allows users to enable offers that are available at specific terminals such as regular checkouts, express lanes, or fuel stations. For more information, refer to *Creating Terminal Sets* on page 546.

Offer History Sub–page

The Offer History sub–page records and displays all activities related to the offer. 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. Selecting the **History** sub–page tab displays the Offer History sub–page.



Chapter 3: Using the Offers Main Tab

Overview

The Logix Offers main tab is a set of pages and tools that allows users to create offers for a particular promotion engine. Offers created from different promotion engines have different sets of allowable conditions and rewards, and behave differently in the store. They may also be stored in different database tables.

This chapter explains how to perform the following general tasks from the Offers main tab for the Universal Engine (UE):

- Searching for an Offer
- Exporting Offers List
- Managing Folders
- Managing Offer Templates
- Creating Offers
- Approving and Rejecting Offers

Managing the Offers Page

Selecting the Offers main tab displays the Offers page by default. For more information, refer to *Offers* on page 154.

To manage the information displayed on the Offers page, use the following controls:

Control	Description
Search	Allows users to search for offers using various criteria.
Pagination Controls	Allows users to select the page views displayed in the window. These controls are enabled when there are more offers to display.
Filter drop–down list	Specifies the Offers that are displayed in the Offers page based on the following criteria: • **Show all**—displays all offers. • **Show all but expired**—displays offers except those with expired dates. • **Show only active**—displays offers only with Active status. • **Show discrepancies**—displays deployed offers that were modified.
New	Creates a new offer.
Import	Imports offers from another Logix system.
Export List	Exports the list of Offers to a spreadsheet.

Using the Search Function

This section describes the steps on how to search for offers using any of the following types of search functions:

- Keyword Search
- Filter Search
- Advanced Search

Keyword Search

To find an offer using a keyword either from the Logix page or Offers page, follow these steps:

1. Do either of the following:
   - From the Offers page, enter a search term in the Search box.
   - From the Logix page in the Search section, select Offers and then, enter the offer name.
2. Select **Search**. Logix displays either of the following:
   - The Offers summary page, if a single offer's name matches the term.
   - A list of all matching offers, if there are multiple matches to the term.

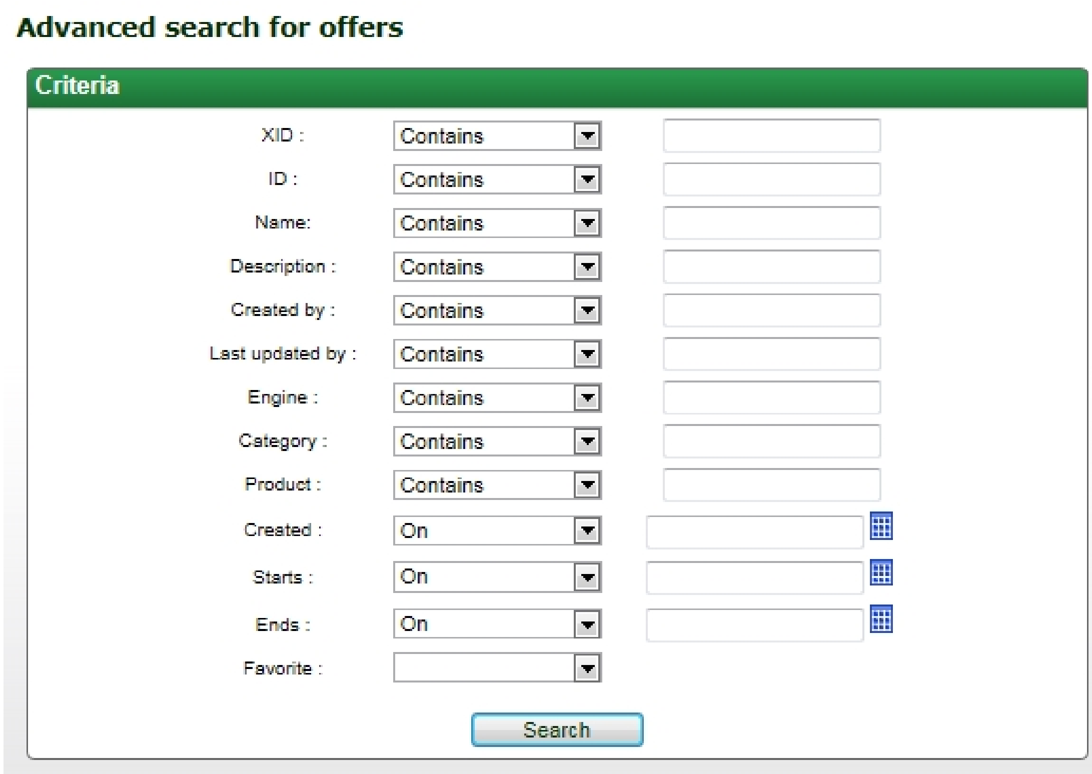
Filter Search

To display offers using a filter from the Offers page, select a filter from the Filter drop–down list. If there are offers that match the selected filter, Logix displays these offers in the Offer List table. Otherwise, there are no offers displayed.

Advanced Search

To search for offers using other characteristics, follow these steps:

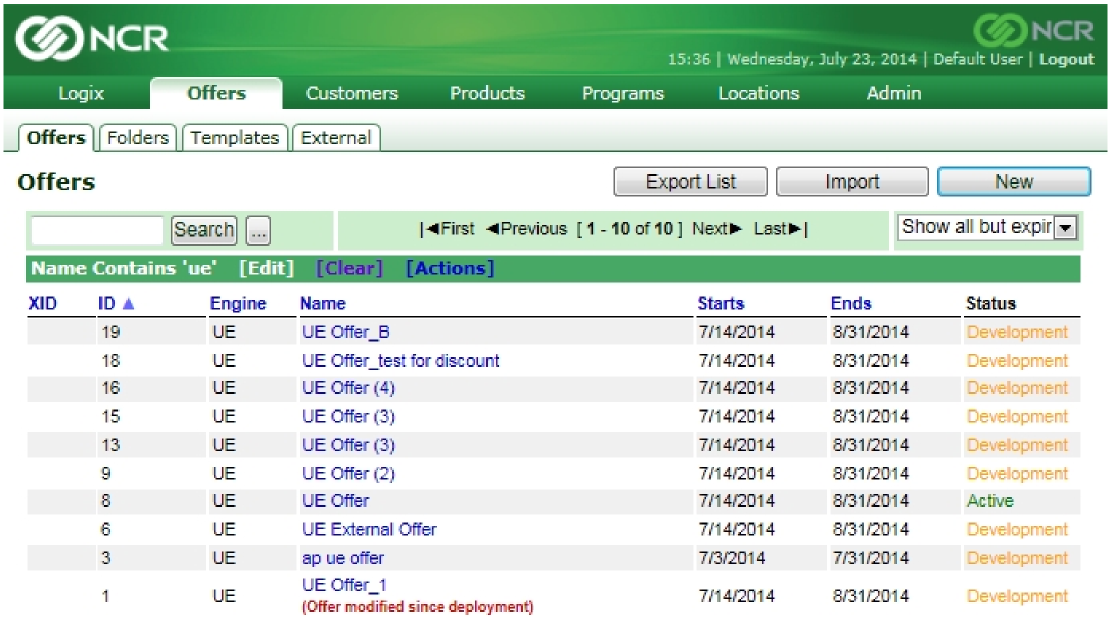
1. From the Offers page, select the **ellipsis** button (…) next to the Search box. The application displays the Advanced Search window.



2. Select an option from a criteria drop–down list.

3. Enter the appropriate keywords or values and then, select **Search**. The application displays the offers that match the search criteria.

   Example: The search criteria used in this example is the offer name.



Note: The criteria summary bar is also displayed at the top of the Offers List table.

4. From the criteria summary bar, select one of the following:

   - **Edit**—to modify the criteria and search again.
   - **Clear**—to clear the results and display the Offers page.
   - **Actions**—to perform actions at one time on multiple offers. For more information, refer to *Performing Mass Actions* on page 82.

Folders

This section provides instructions on how to create and manage offer folders.

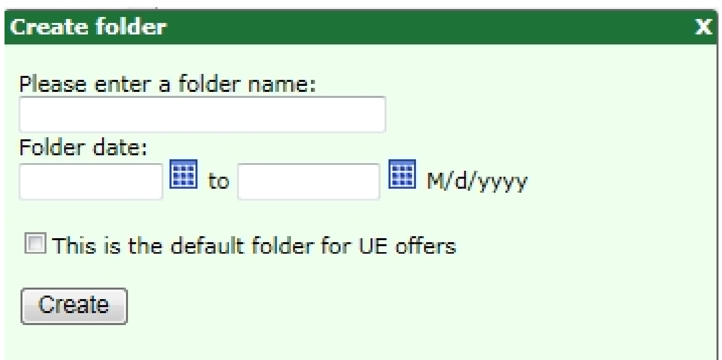
Note: An offer can be in any number of different folders simultaneously, or can be in none.

Creating Folders

To create folders, follow these steps:

Note: This procedure uses the steps to create a root folder.

1. From the Folders page, select the **folder icon** overlaid with a green plus sign. The Create folder pop–up window is displayed.

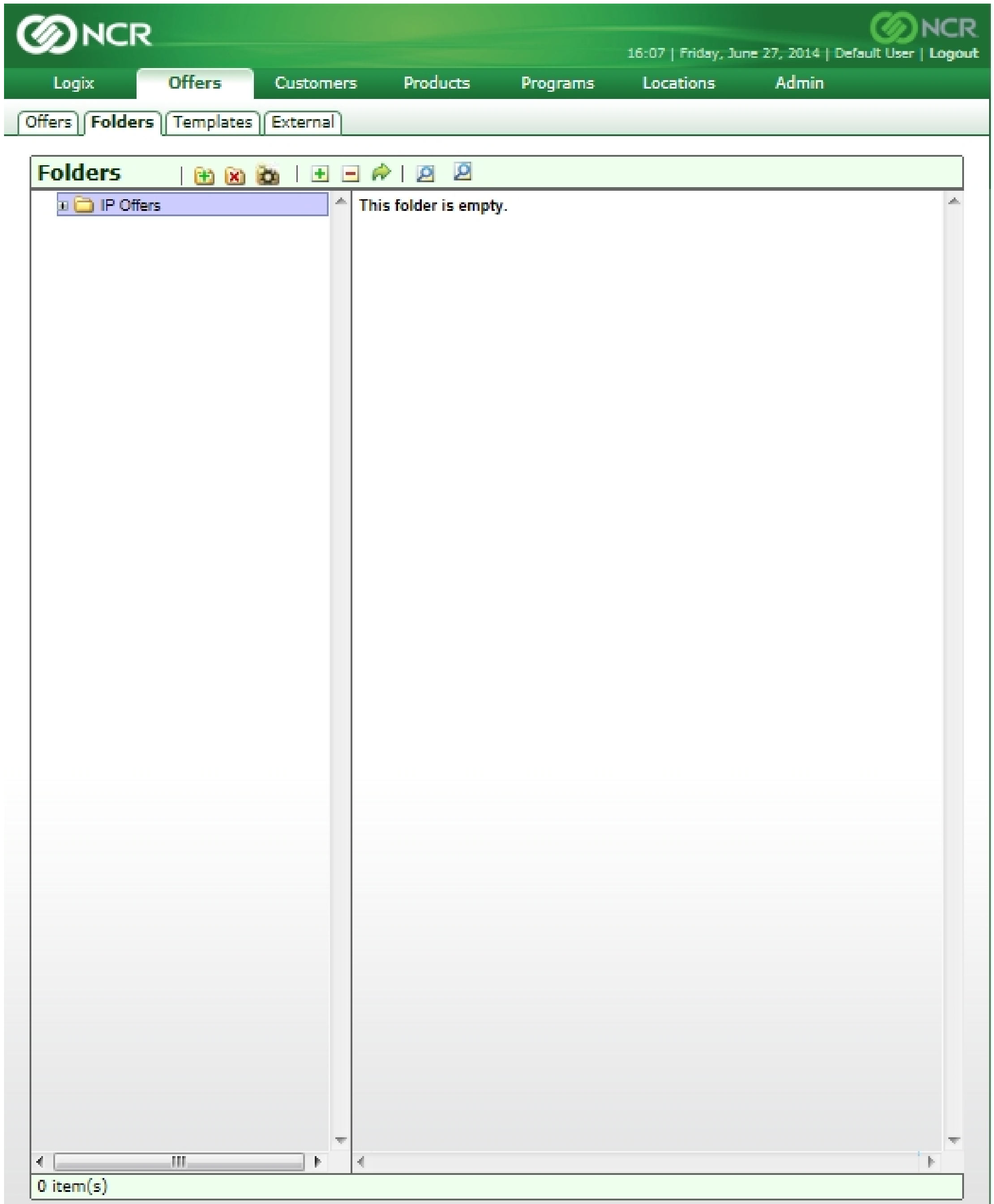


Note: To create a sub–folder, select a folder from the left pane.

2. Do the following:
   - In the folder name field, enter the name for the folder.
   - In the Folder date fields, enter the start and end dates.

   Note: The Folder end date should not be earlier than the current date.

3. Select **Create**. The folder is displayed under the selected folder or as the root folder.



Modifying Folders

To modify existing folders, follow these steps:

1. From the left pane of the Folders page, highlight a folder.
2. Select the **folder** icon overlaid with a wheel icon. The application displays a pop–up window.
3. Do any of the following:
   - Modify the folder name.
   - Modify the start and end dates of the folder.
4. Select **Save** to apply the changes.

Searching for Offers

To find all occurrences of an offer in all folders, follow these steps:

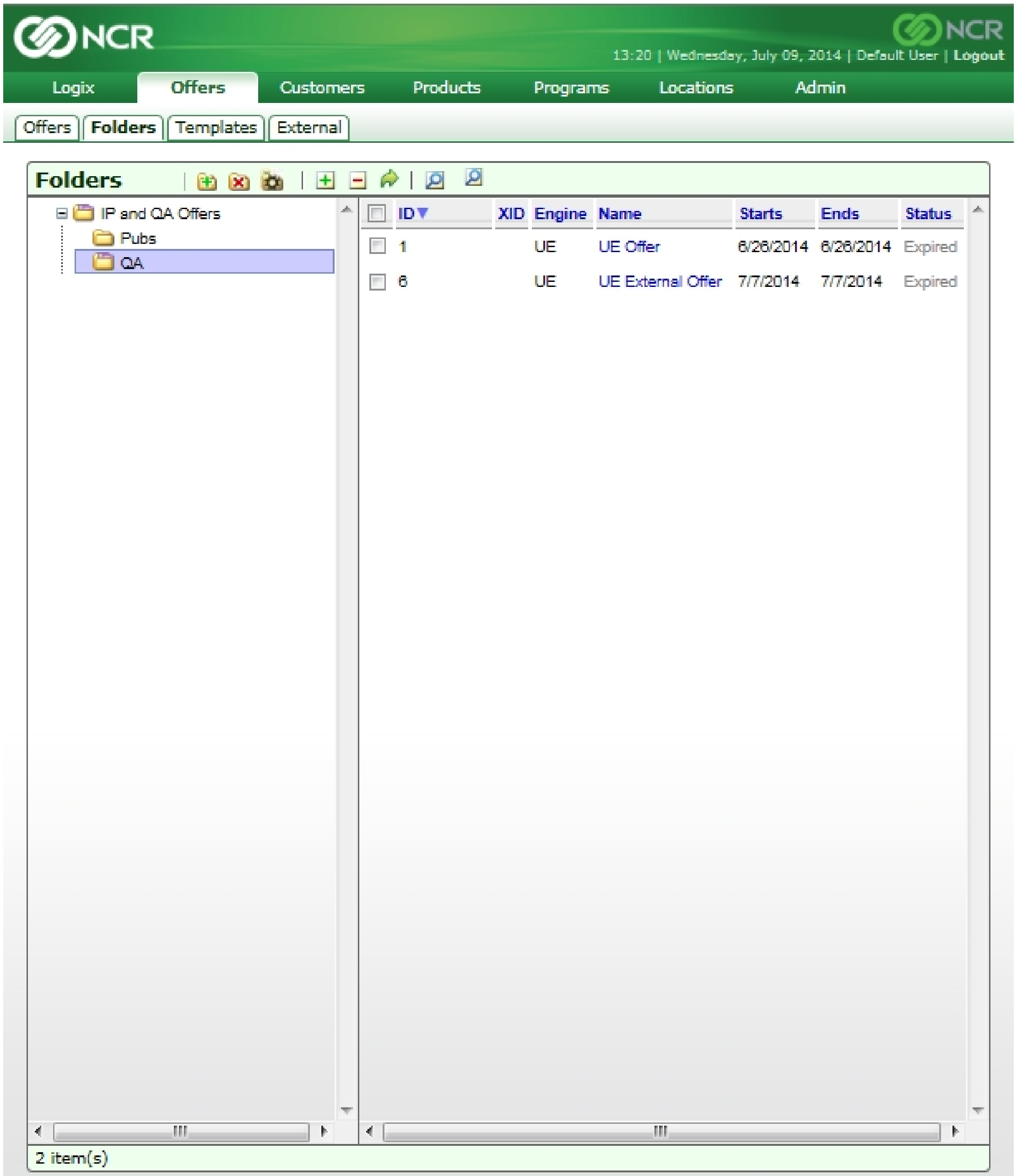
1. From the Folders page, select the **magnifying glass** icon. The application displays the following window:

2. Enter a search term and then, select either of the following:
   - **Folders**—displays the folder names and the parent folders.
   - **Offers**—displays the offer name and the folder that contains it.

3. Select **Search**. The application displays hyperlinks of offers or folders that matched the search term. The following example displays offer names and the hyperlinks of their corresponding folders.

Note: Selecting **Folders** displays the hyperlinks of sub-folders and parent folders.

4. Select a link. The application displays the folder page as shown in the following example:



Adding Offers to Folders

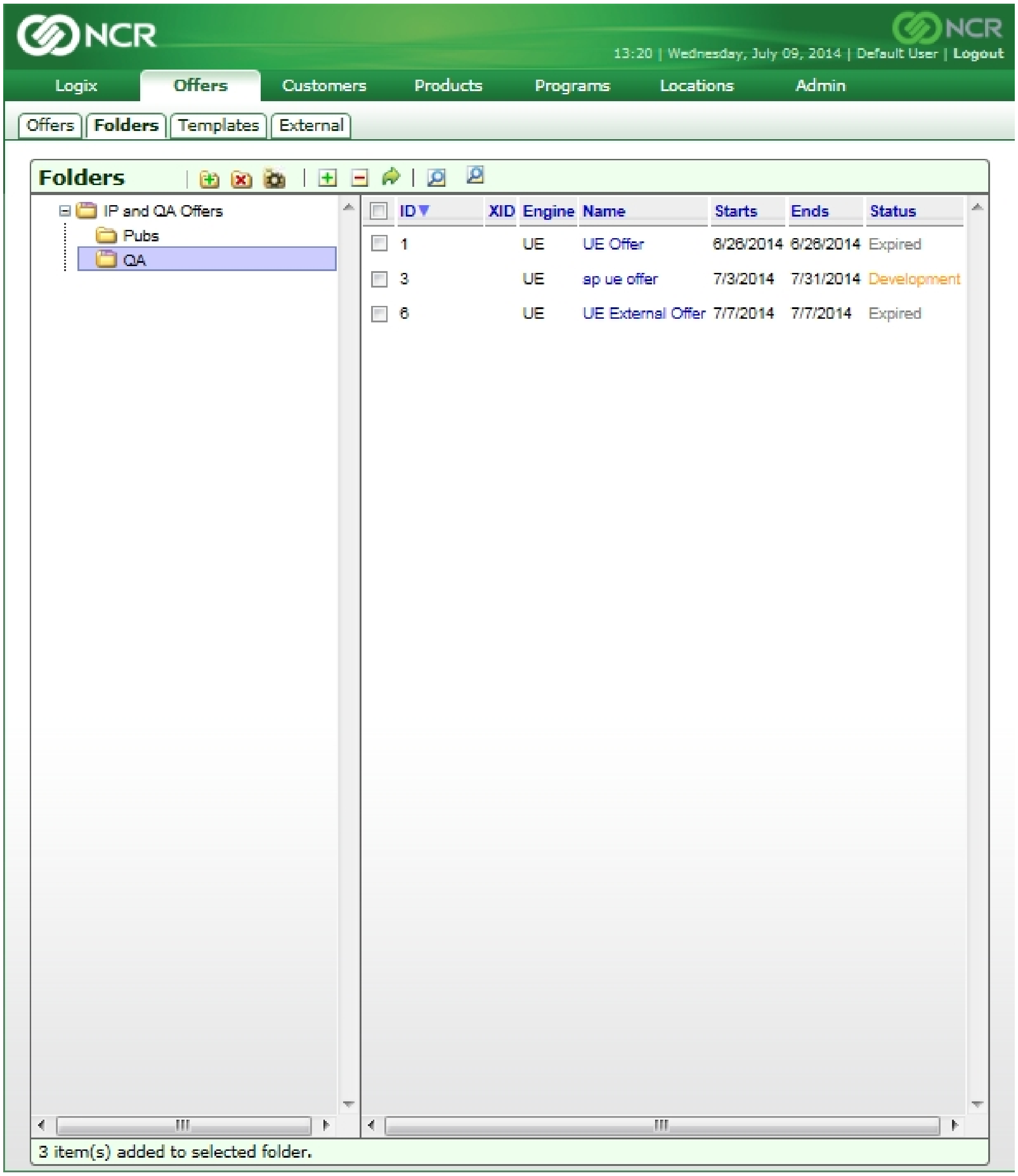
To add offers to folders, follow these steps:

1. From the left pane of the Folders page, highlight a folder or sub–folder.
2. Select the **plus (+)** icon. The application displays the Add items window.

3. Enter a search term and then, select **Search**. The application displays the offers that matched the search criteria.

4. Select the corresponding check box of one or more offers.

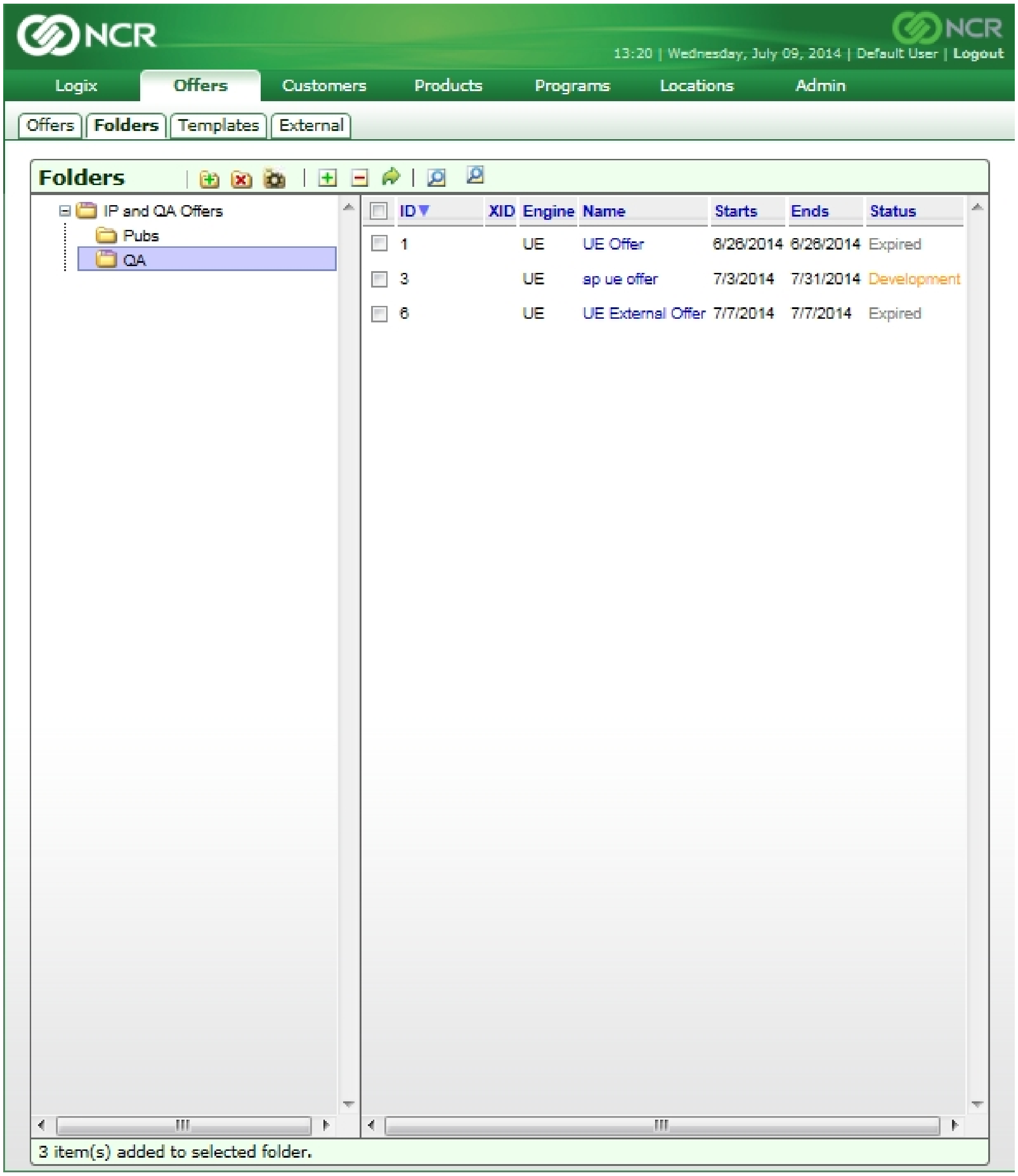
5. Select **Add**. The offers are displayed in the right pane of the Folders page.



Removing Offers from Folders

To remove an offer from a folder, follow these steps:

1. From the left pane of the Folders page, select a folder. The application displays the offers in the right pane.



2. Select the corresponding check box of one or more offers.
3. Select the **minus (-)** icon. The application displays a confirmation window.
4. Select **OK** to remove the selected offers.

Deleting Folders

To delete folders, follow these steps:

1. From the Folders page, highlight a folder or sub–folder.

Note: Deleting a folder also deletes its sub–folders.

2. Select the **folder icon** overlaid with a red X. The application displays a confirmation window.
3. Select **OK**.

Performing Mass Actions

To perform actions at one time on all offers in a folder, use the **Perform Action** button from Folder page. The Perform action button is indicated by a green arrow. Selecting this button permits users to do the following procedures:

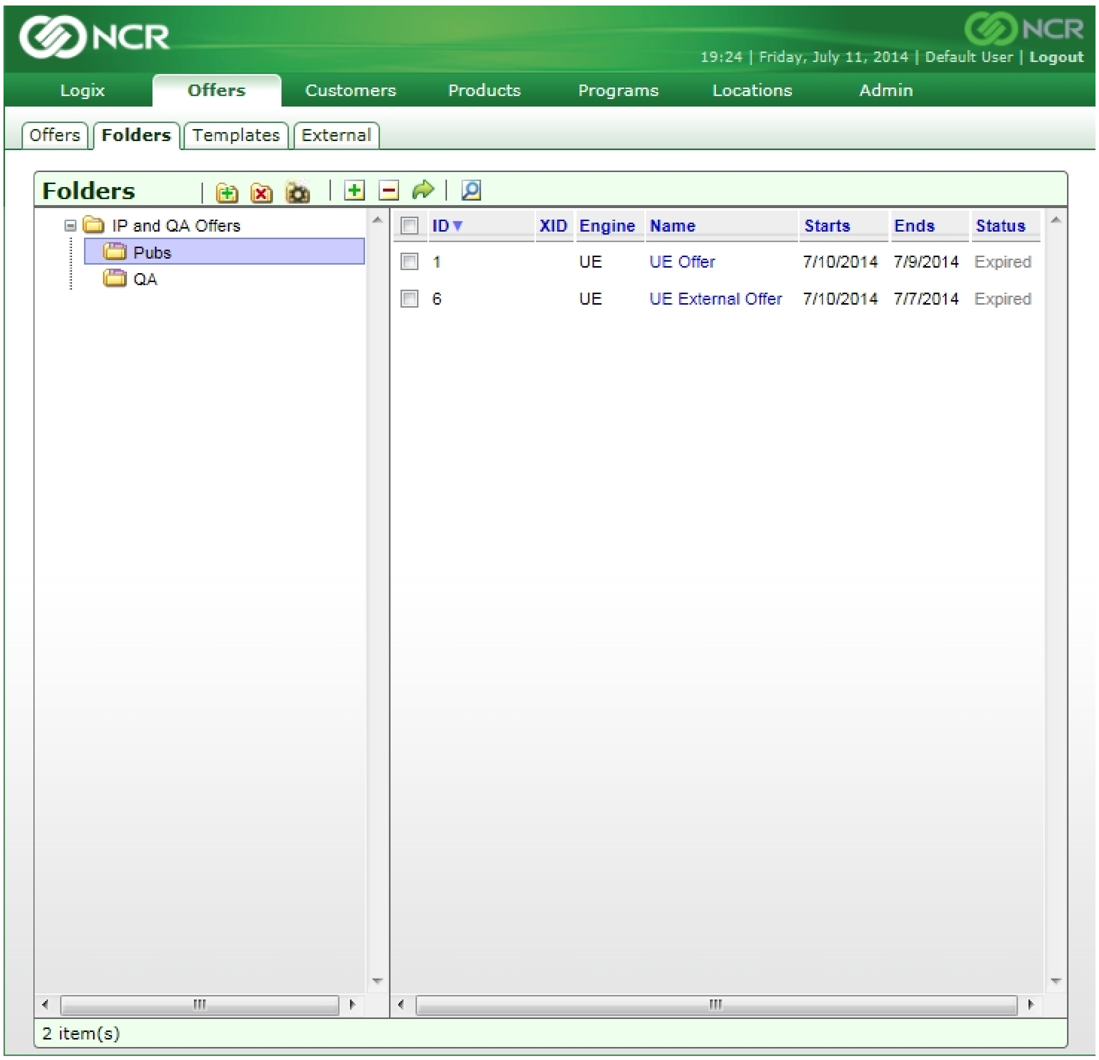
- Applying Folder Dates to Offers
- Copying and Transferring Offers to Folders
- Deploying Multiple Offers
- Deploying Multiple Colliding Offers
- Sending Offers Outbound

Applying Folder Dates to Offers

In the Folders page, retailers can modify the start and end dates of offers within a folder to correspond to the folder's start and end dates. Performing this action affects all the offers within the selected folder, allowing retailers to modify offer dates all at once.

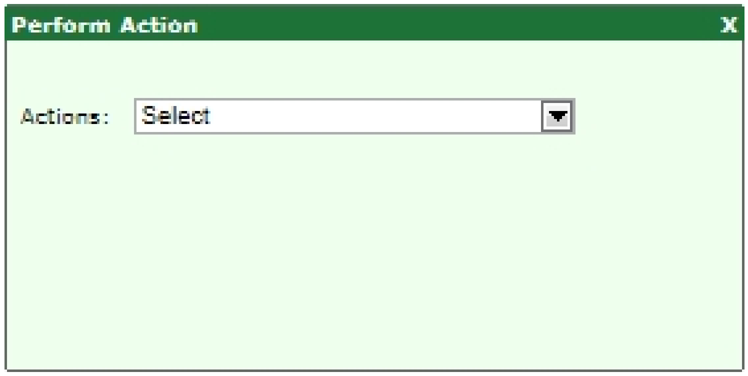
To apply the Folder Dates to offers, follow these steps:

1. From the left pane of the Folders page, select a folder or sub–folder. The application displays offers in the right pane.



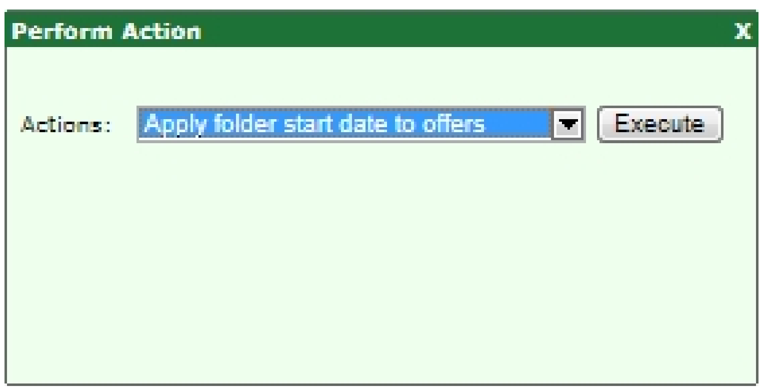
2. Select the corresponding check boxes of offers to which the Folder date is applied.

3. From the Folders toolbar, select the **Perform Action** button. The Perform Action window is displayed.



4. From the Actions drop–down list, select any of the following options:
   - **Apply folder start date to offers**—applies only the Folder Start Date to offers.
   - **Apply folder end date to offers**—applies only the Folder End Date to offers.
   - **Apply folder start/end dates to offers**—applies both the Folder Start and End Dates to offers.

   The Execute button is enabled.

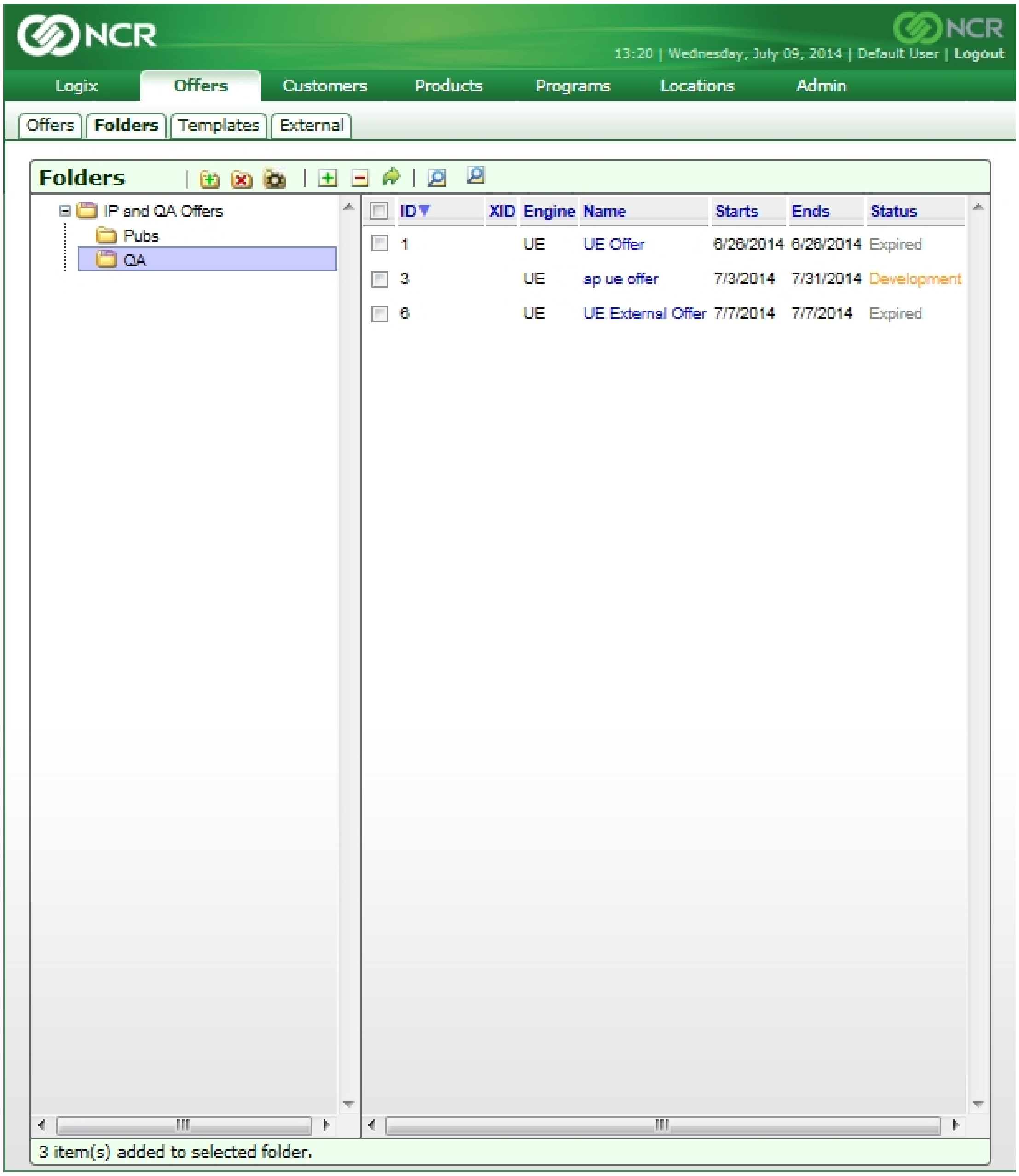


5. Select **Execute**. The selected option is applied to the offers.

Copying and Transferring Offers to Folders

To move offers to another folder, follow these steps:

1. Open a folder. The offers are displayed on the Offers pane.



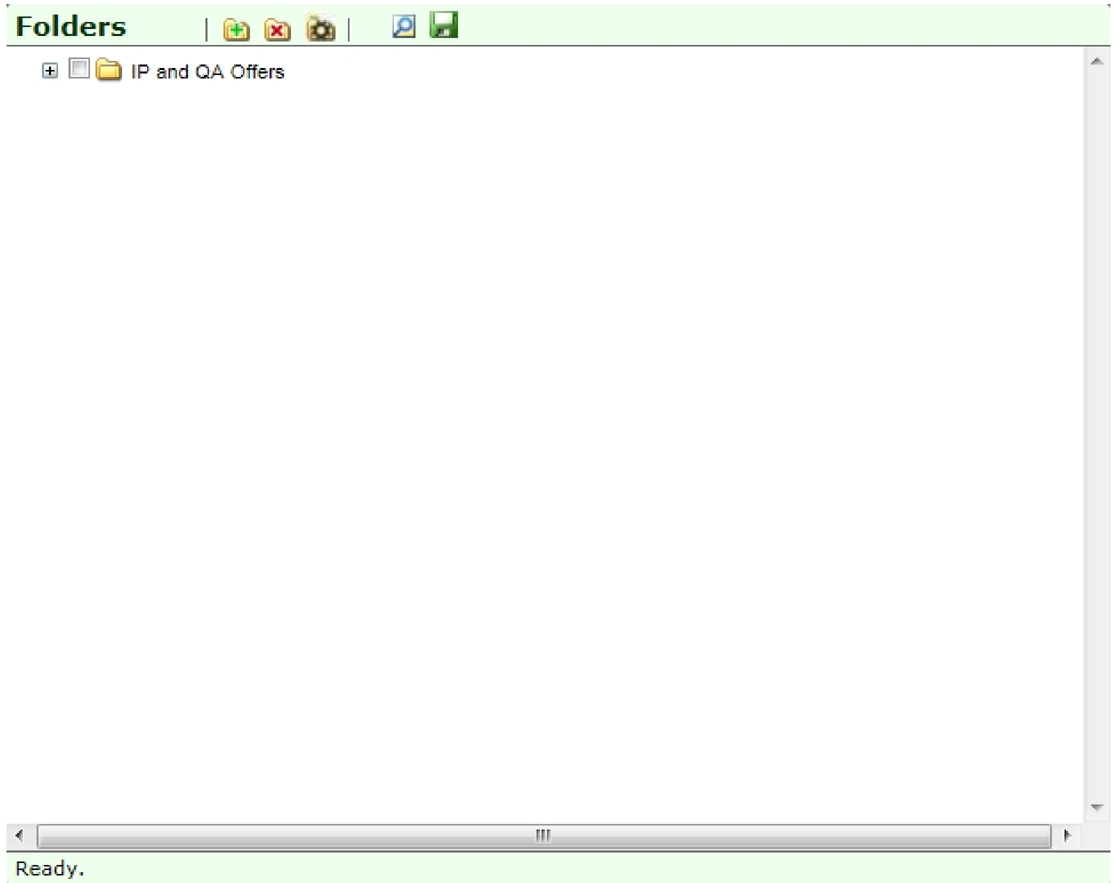
2. Select the check box of offers to be copied or moved to another folder.

3. Select the **Perform Action** button. The Perform Action window is displayed.

4. From the Actions drop–down list, select any of the following:
   - **Duplicate Offers**—to copy the offers.
   - **Transfer Offers**—to move the offers.

   The Browse button is enabled.

5. Select the **Browse** button. The Folders window is displayed.



6. Select a folder check box in which to copy or transfer the offers.

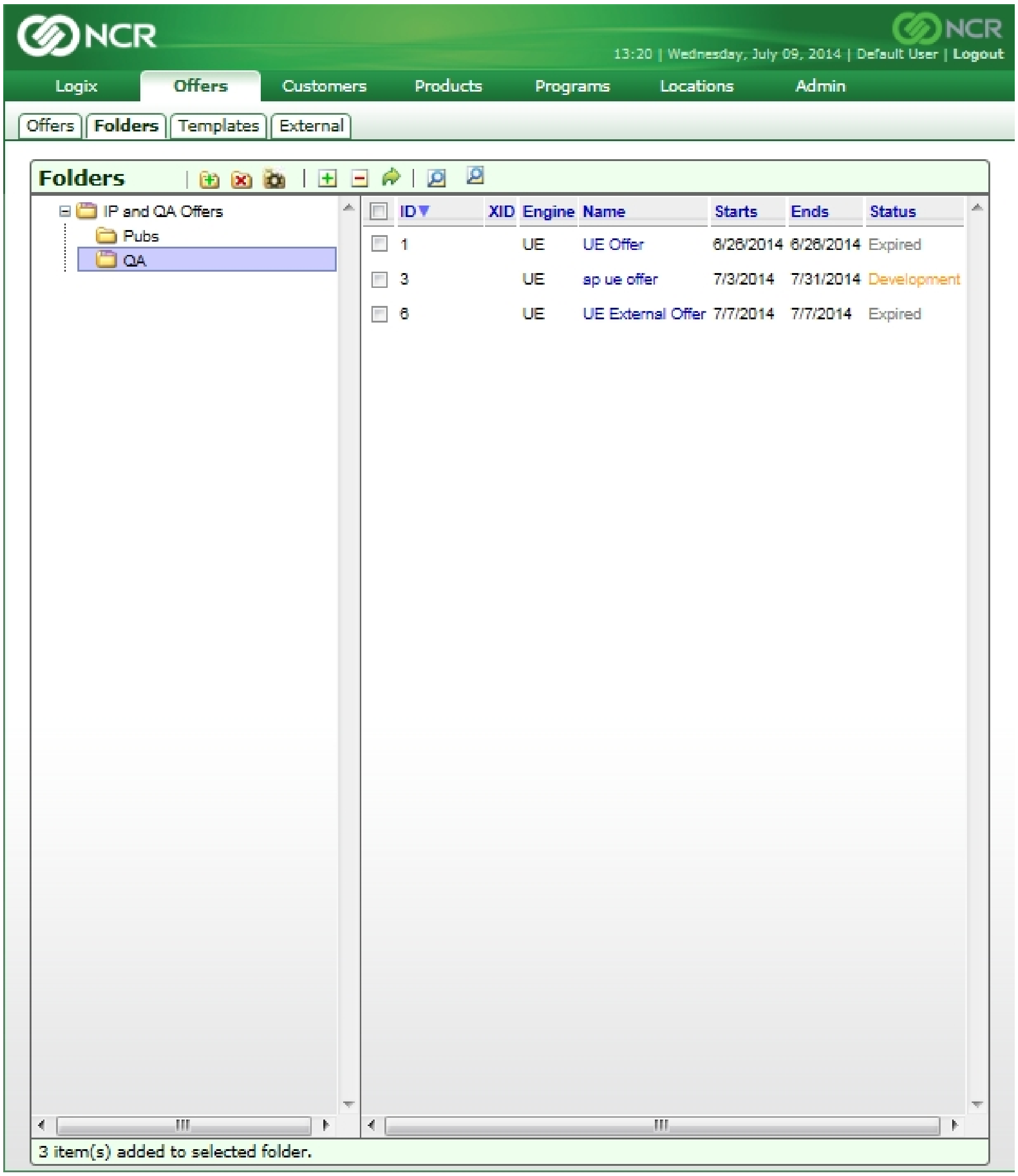
Note: Expand the root folders to select a sub–folder.

7. Select the **Save** icon and then, close the window.
8. From the Perform Action window, select **Execute**. A confirmation window is displayed.
9. Select **OK**. The offers are transfered to the specified folder.

Deploying Multiple Offers

To deploy multiple offers in a folder at one time, follow these steps:

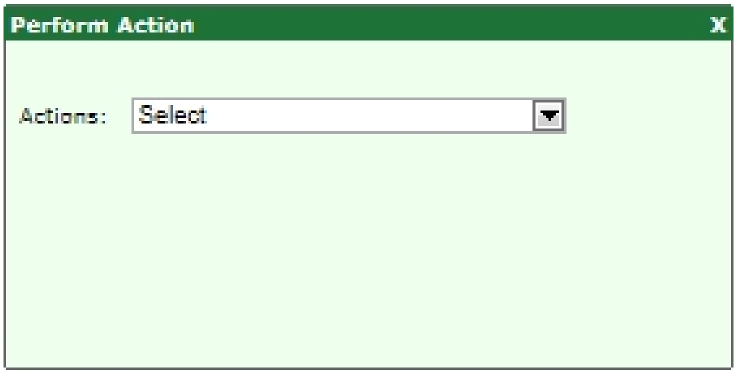
1. From the left pane of the Folders page, select a folder or sub–folder. The application displays offers in the right pane.



2. Select the corresponding check boxes of offers to be deployed.

Note: To successfully deploy offers, ensure that they are configured with at least one terminal and have defined tier values.

3. From the Folders toolbar, select the **Perform Action** button. The Perform Action window is displayed.



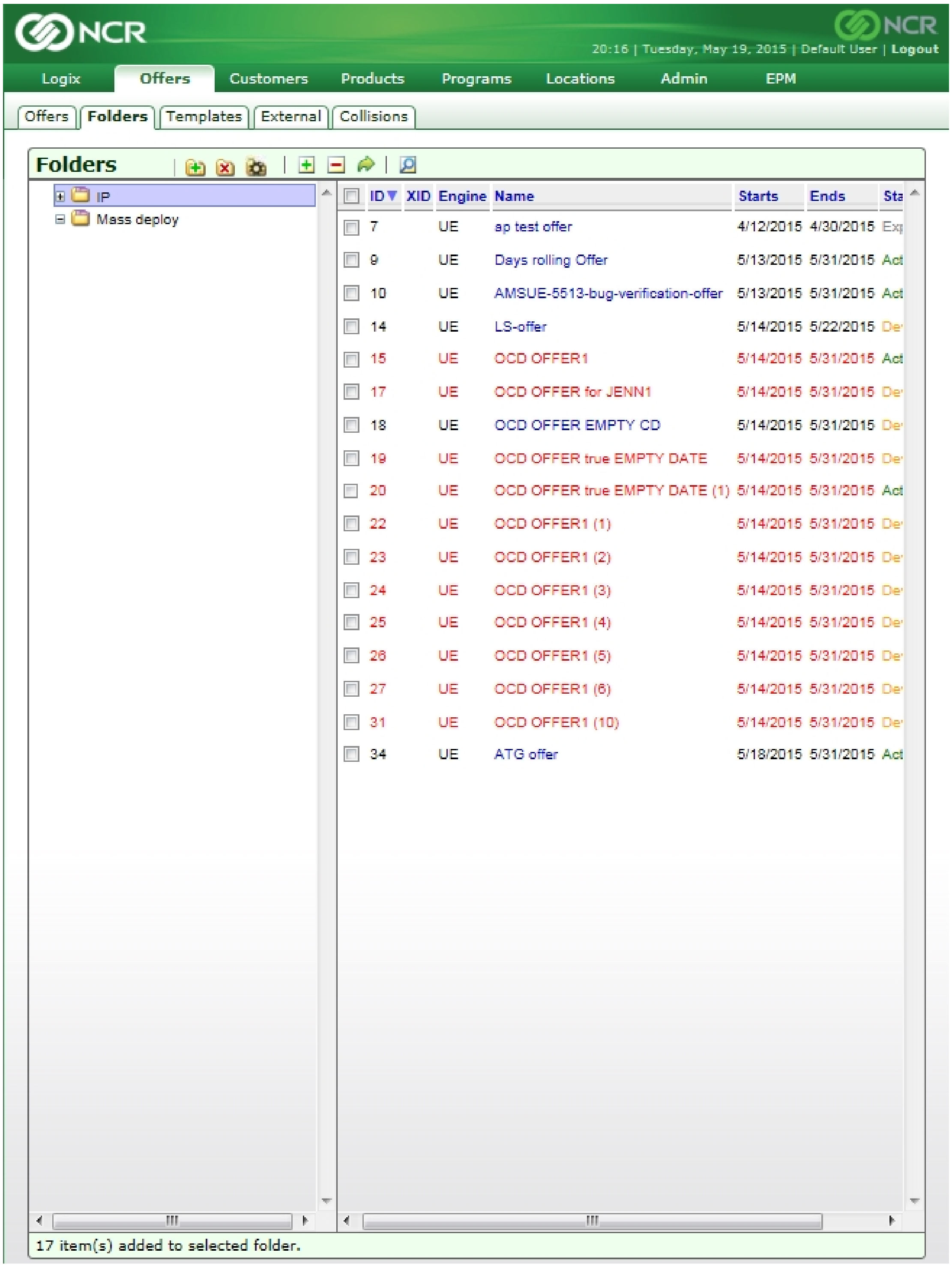
4. From the Actions drop–down list, select the **Deploy** option. The Execute button is enabled.

5. Select **Execute**. A confirmation window is displayed.
6. Select **OK**.

Deploying Multiple Colliding Offers

To deploy multiple colliding offers in a folder at one time, follow these steps:

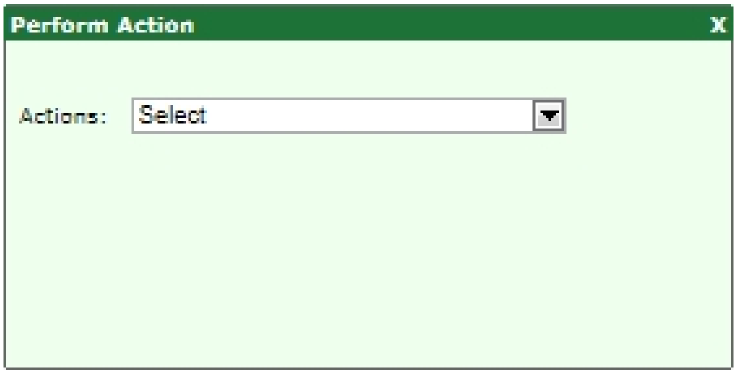
1. From the left pane of the Folders page, select a folder or sub–folder. The application displays offers in the right pane.



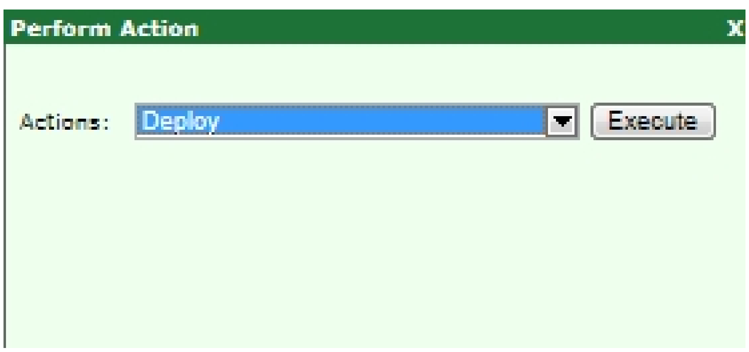
2. Select the corresponding check boxes of offers to be deployed.

Note: To successfully deploy offers, ensure that they are configured with at least one terminal and have defined tier values.

3. From the Folders toolbar, select the **Perform Action** button. The Perform Action window is displayed.



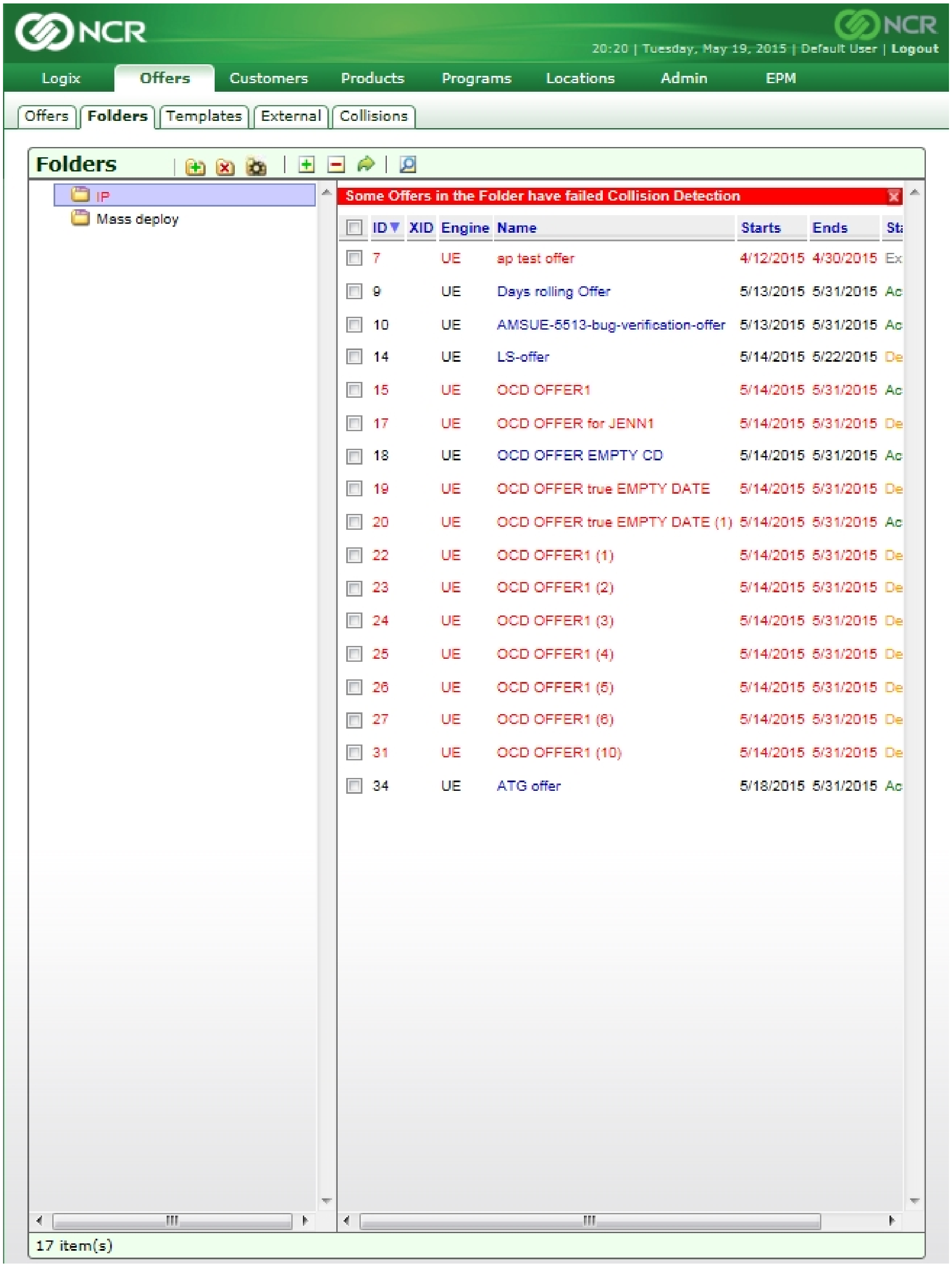
4. From the Actions drop–down list, select the **Deploy** option. The Execute button is enabled.



5. Select **Execute**. A confirmation window is displayed.
6. Select **OK**. The Folders page is displayed. If there are offers in the folder that did not pass collision detection, the folder name becomes Red.

Note: Offers that failed collision detection and the folder that contains those offers up to the top level folder are displayed with their names in Red font.

7. Select the folder to display the deployed offers. A failed status is displayed above the offers.



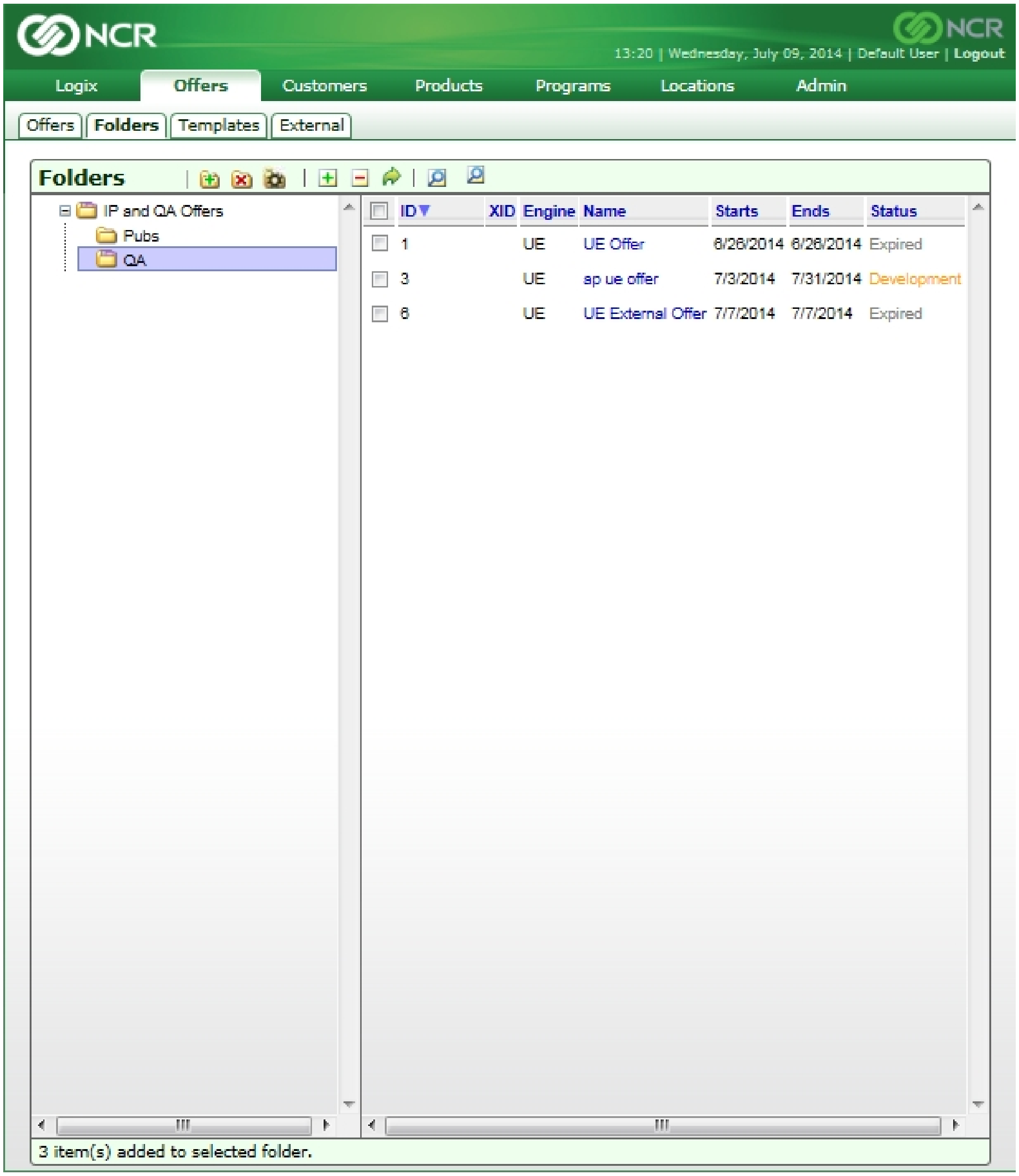
8. To view the failure reasons, select any offer that failed collision detection. A pop–up window is displayed.

9. Do any of the following:;
   - Select **View Offer**. The Offer Summary sub–page is displayed. For more information, refer to *Offer Summary Sub–page* on page 53.
   - Select **View Collision Report**. The Collision Report page is displayed. For more information, refer to *Accessing Collision Reports* on page 116.

Sending Offers Outbound

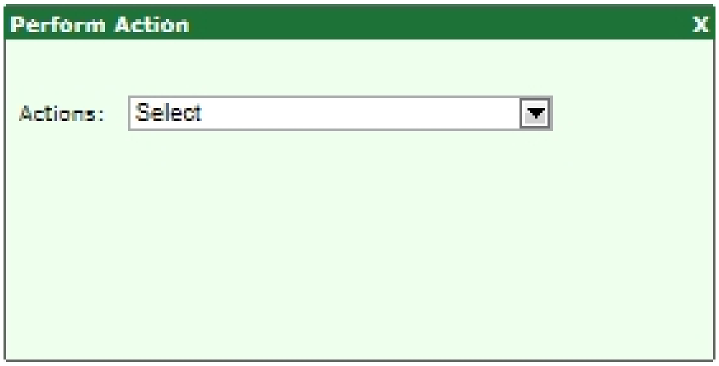
To send out offers from a folder to bind with the CRM Offer Connector, follow these steps:

1. From the left pane of the Folders page, select a folder or sub–folder. The application displays offers in the right pane.

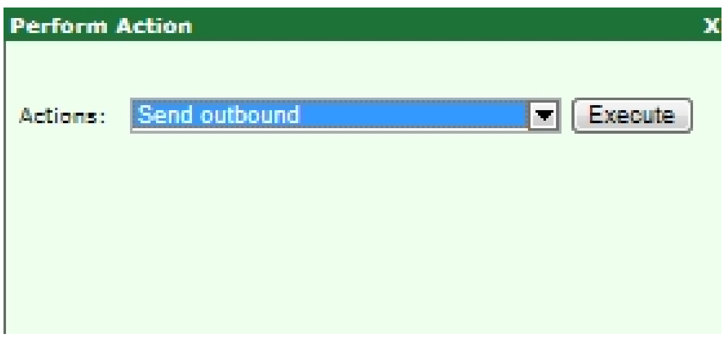


2. Select the corresponding check boxes of offers.

3. From the Folders toolbar, select the **Perform Action** button. The Perform Action window is displayed.



4. From the Actions drop–down list, select the **Send outbound** option. The Execute button is enabled.



5. Select **Execute**. A confirmation window is displayed.
6. Select **OK**.

Offer Templates

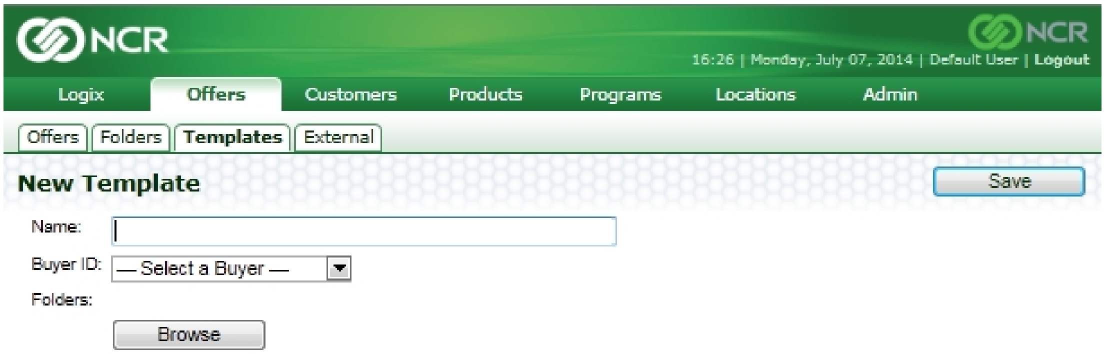
Templates are semi–completed offers that help users create offers by only changing or adding values in certain fields. They permit users to create several different offers with similar characteristics. This section provides instructions on how to create and manage offer templates.

Note: Unless otherwise noted, templates and regular offers have the same parameters.

Creating Templates

To create templates, follow these steps:

1. From the templates page, select **New**. The New Template page is displayed.



   Selecting a Buyer is optional. If the template is associated with a buyer role, which has a specified default folder, that folder will be pre–selected when a new offer template is created. The buyer role default folder takes precedence over the engine default folder.

Note: If the Buyer ID is not available, create a Buyer. For more information, refer to *Creating Buyers* on page 622.

2. Enter the template name.

Note: Select **Browse** to specify the folder in which to save the template.

3. From the Buyer ID drop–down list, select a buyer.
4. Select **Save**. The application displays the Template Configuration sub–page with a system generated template number.
5. Configure the Template parameters and then, select **Save**. For more information, refer to *Using the Logix Offer Builder* on page 145.

Note: Unless otherwise noted, templates and regular offers have the same parameters.

Retailers can use an existing offer to create an offer template. For more information, refer to *Creating Offer Templates from Offers* on page 163.

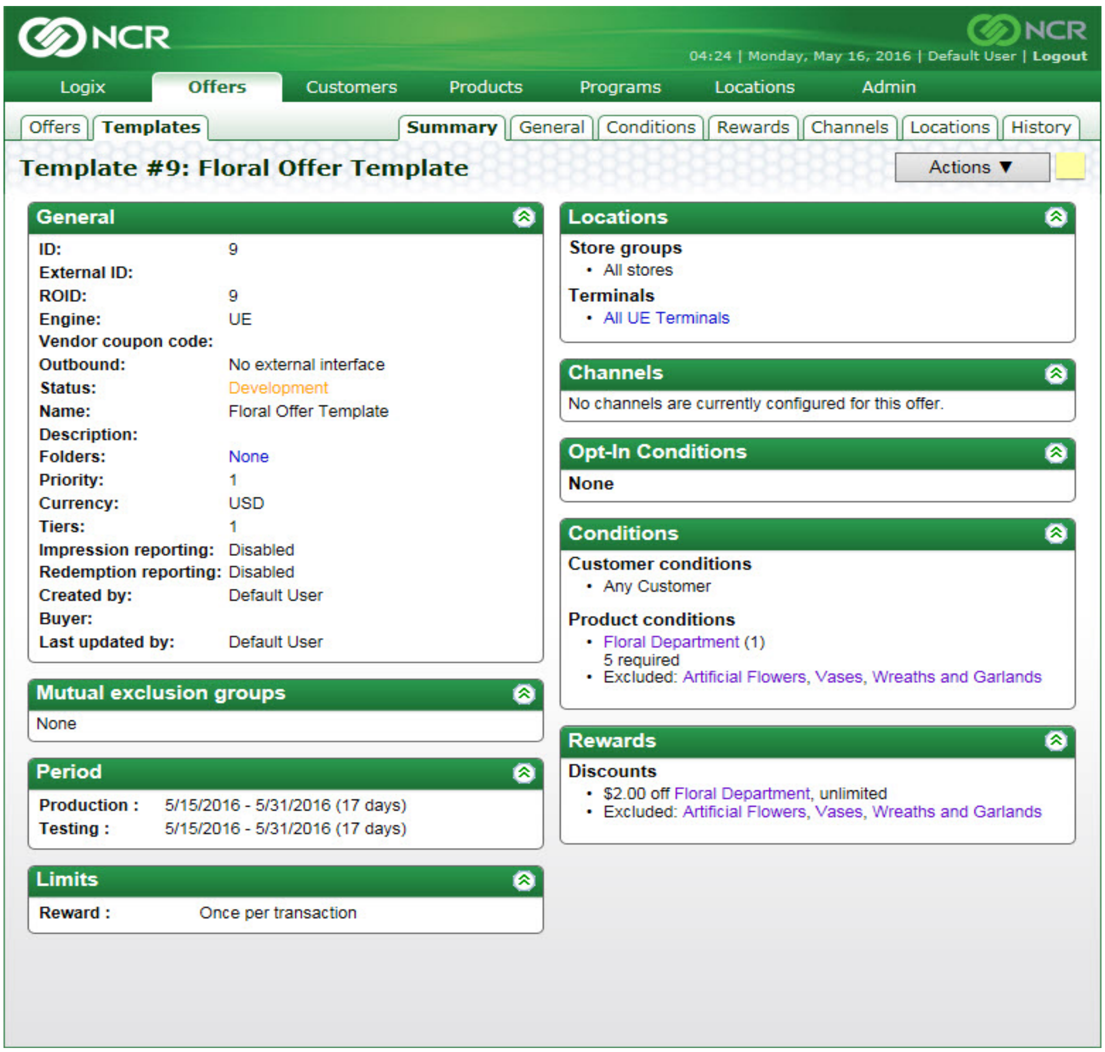
Copying Templates

To create templates by copying existing templates, follow these steps:

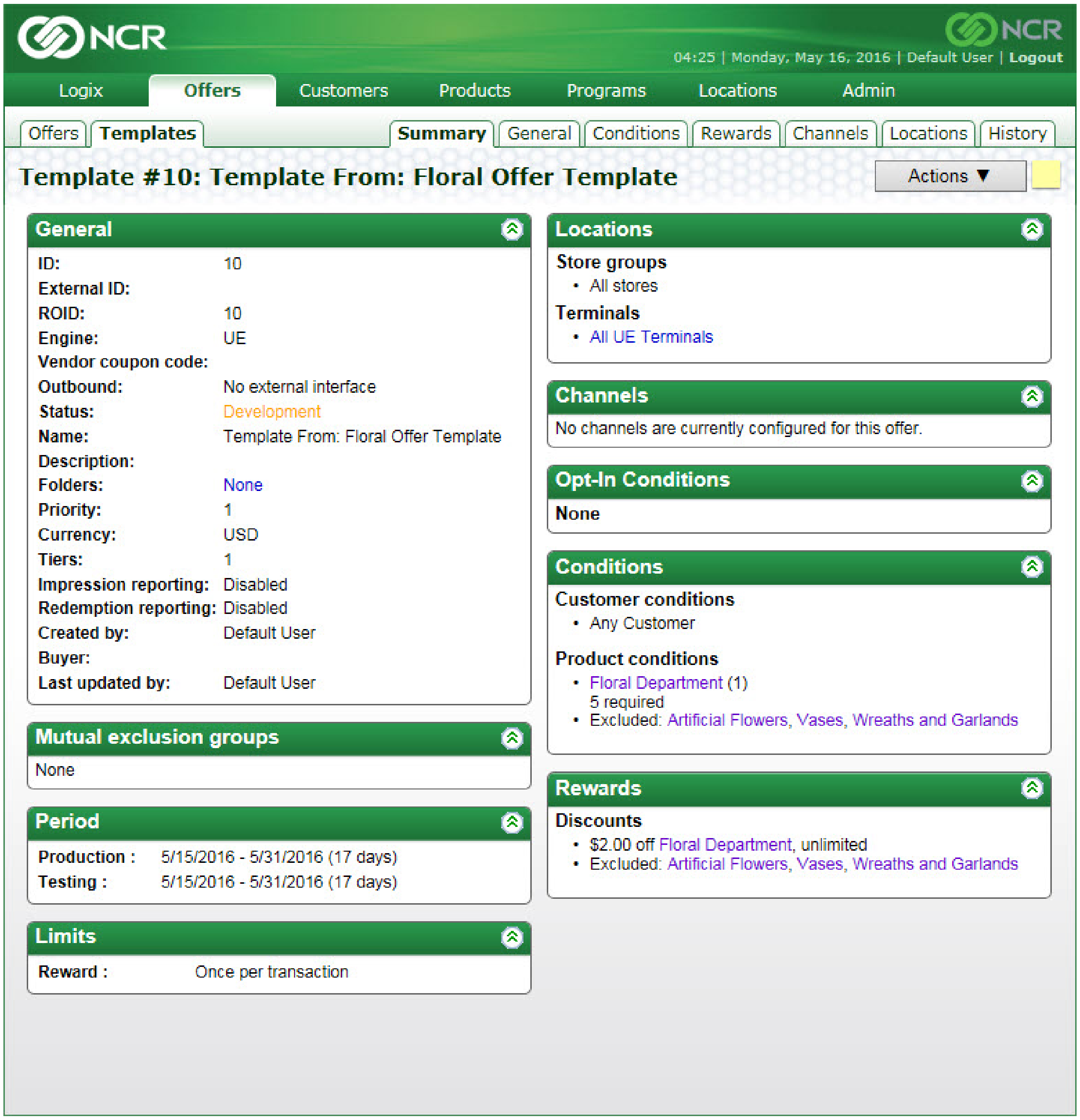
1. From the Templates page, select a template. The corresponding Template Configuration sub–page is displayed.

Note: To view all activities related to the offer template, select the **History** sub–page tab. For more information, refer to *Tracking Template Changes* on page 100.

2. Select the **Summary** sub–page tab. The application displays the Template Summary sub–page.



3. From the Actions menu, select **Copy template**. The Template Summary sub–page displays a copy of the template indicated by "Template From:" in the Template title.



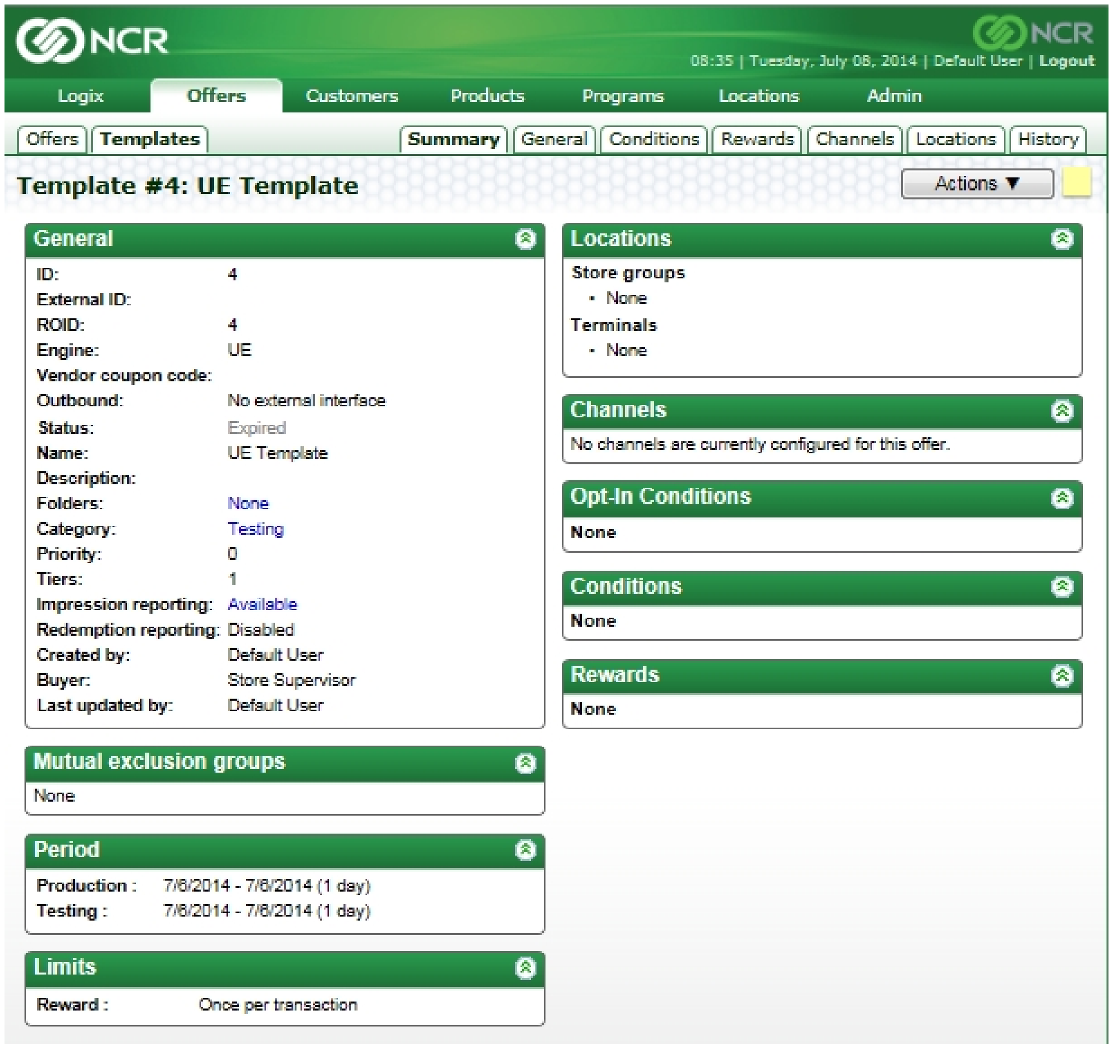
4. Configure the Template parameters and then, select **Save**. For more information, refer to *Using the Logix Offer Builder* on page 145.

Note: Unless otherwise noted, templates and regular offers have the same parameters.

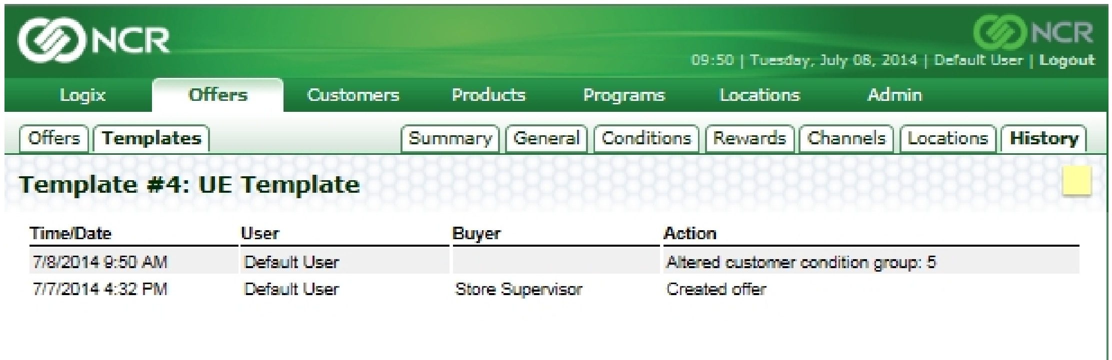
Tracking Template Changes

To view the history details of a template, follow these steps:

1. From the Templates page, select a template. The Template Configuration sub–page is displayed.



2. Select the **History** sub–page tab. The application displays the changes made to the template.



Note: Select the **Notes** icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Deleting Templates

To delete templates, follow these steps:

1. From the Templates page, select a template. The corresponding Offer Template Configuration sub–page is displayed.
2. Select the **Summary** sub–page tab. The Summary sub–page is displayed.
3. From the Actions menu, select **Delete**. A confirmation page is displayed.
4. Select **OK**. The application deletes the template from the Templates page.

External Offers

The External Offers page displays the list of external offers that were created externally (outside of Logix). Retailers may filter the list by external offer source. Retailers may also create an external offer for an external source. For more information on external offer sources, refer to *External Offer Sources* on page 625.

Note: Offers displayed in this page are not shown in the main offer list.

This section provides instructions on how to create and manage external offers.

Managing the External Offers Page

To manage the information that displays on the External Offers page, use the following controls:

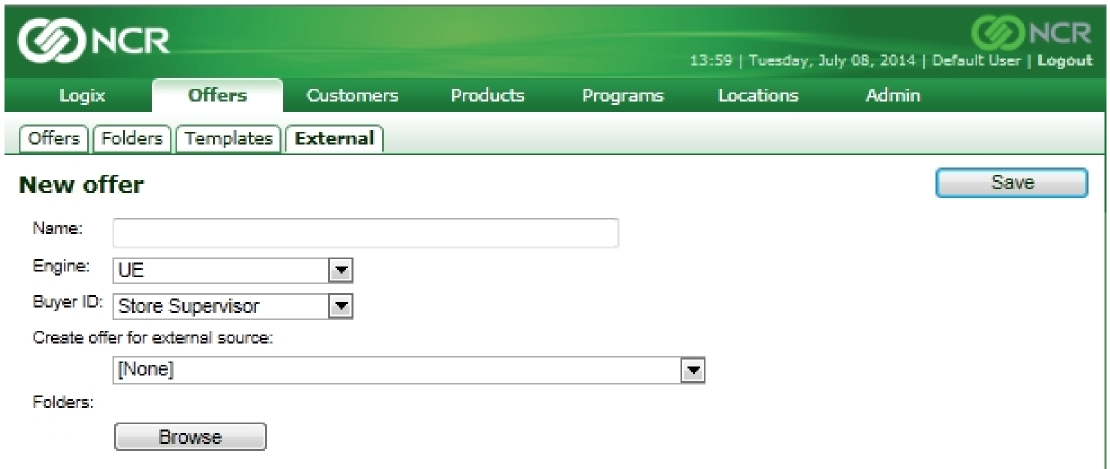
Control	Description
Search	Allows users to search for offers using various criteria.
Pagination Controls	Allows users to select the page views displayed in the window. These controls are enabled when there are more offers to display.
Filter drop–down list	Specifies the Offers that are displayed in the Offers page based on the following criteria: • **All Offers**—displays all offers. • **External source**—displays offers based on the selected third–party entity.
New	Creates a new offer.
Import	Imports offers from an external source.
Export List	Exports the list of external offers into an XML file. For more information, refer to *Exporting Offers List from External Offers Page* on page 109.

To associate an external offer with an offer created in Logix, refer to *Configuring Offer Locations* on page 509.

Creating External Offers

To create an external offer, follow these steps:

1. From the External Offers page, select **New**. The New External Offer page is displayed.



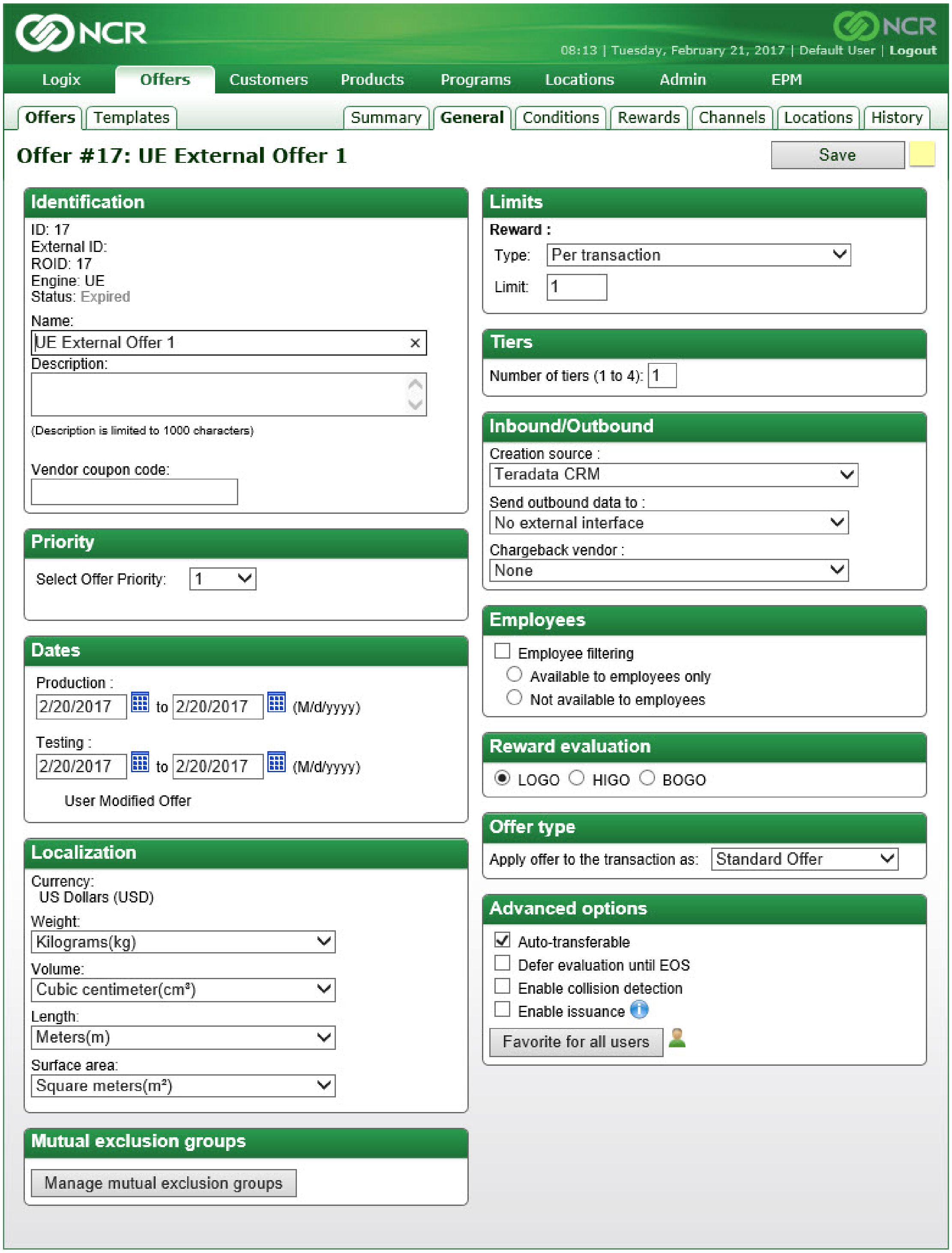
Note: If the Buyer ID field is not available, create a Buyer. For more information, refer to *Creating Buyers* on page 622.

2. Enter the following details:

   - **Name**—name of the external offer.
   - **Engine**—the promotion engine on which the offer is used.
   - **Buyer ID**—the buyer role with which the offer is associated.
   - **Create offer for external source**—the external source for which the offer is created.
   - **Folders**—the folder in which the offer is saved. For more information, refer to *Folders* on page 72.

   Note: Defining a folder for offers is optional.

3. Select **Save**. The corresponding Offer Configuration sub–page is displayed.



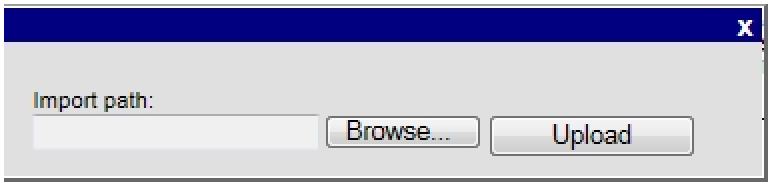
4. Configure the offer. For more information, refer to *Using the Logix Offer Builder* on page 145.

Note: To view all activities related to the external offer , select the **History** sub–page tab. For more information, refer to *Tracking External Offer Changes* on page 111.

Importing Offer Files from External Offers Page

To import an offer file from an external source to Logix, follow these steps:

1. From the External Offers page, select **Import**. A pop–up window is displayed.



Note: To import offer files from the Offers page, refer to *Importing Offer Files from Offers Page* on page 167.

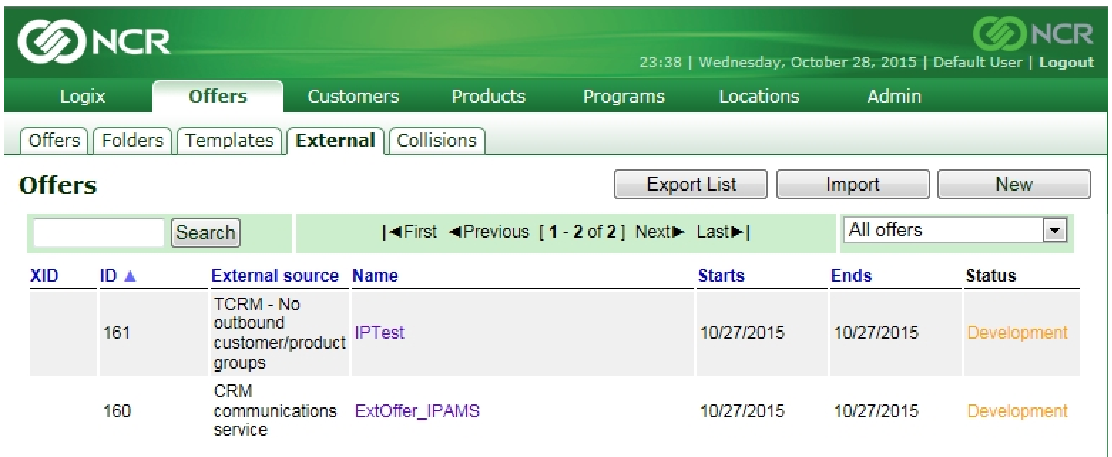
2. Select **Browse**. A file directory window is displayed.
3. Select the .GZ file to import.
4. Select **Upload**. The External Offers page displays the imported offer configuration.
5. Do any of the following:
   - Modify the Offer configuration when necessary and then, select **Save**. For more information, refer to *Using the Logix Offer Builder* on page 145.
   - Deploy the Offer. For more information, refer to *Deploying Offers* on page 177.

Exporting Offer Files from External Offers Page

Logix can export an external offer to the local computer in .GZ format. To export an external offer, follow these steps:

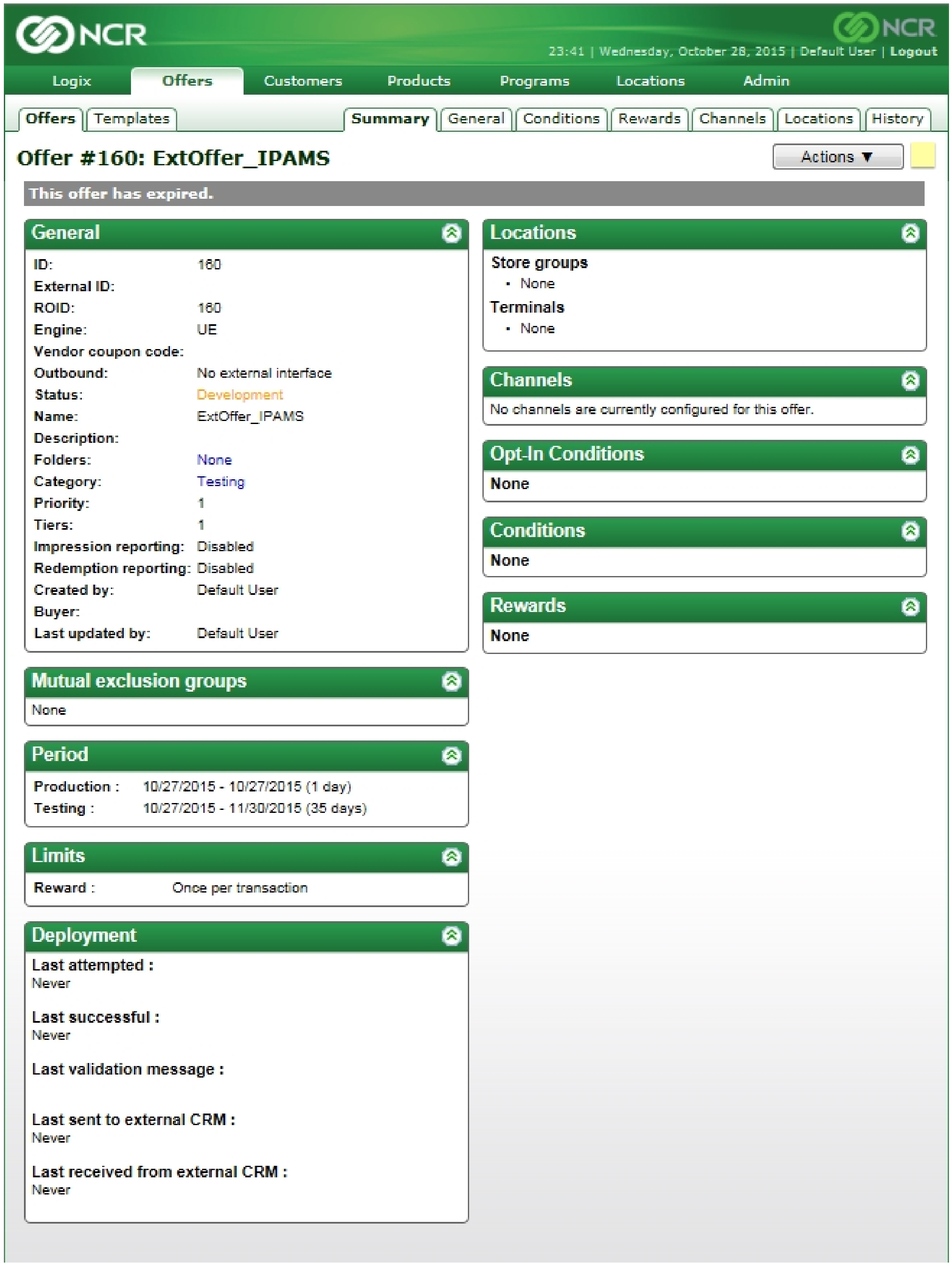
Note: Logix permits users to export only one offer at a time.

1. From the Offers main tab, select the **External** page tab. The External Offers page displays a list of external offers as shown in the following example:



Note: To specify the Offers to display in the External Offers page, select an option from the Filter drop–down list.

2. Select an offer. The corresponding Offer Summary page is displayed.



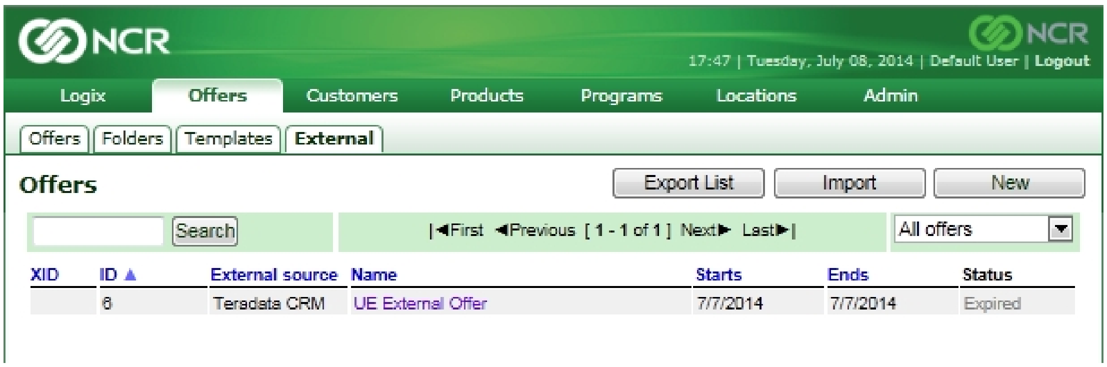
3. From the Actions menu, select **Export** and then, save the offer. The offer is downloaded as a .GZ file.

To import an external offer, refer to *Importing Offer Files from External Offers Page* on page 106.

Exporting Offers List from External Offers Page

Logix can export the list of external offers to the local computer in `.xls` format. To export the offers list, follow these steps:

1. Select an option from the Filter drop–down list to specify the External Offers to display in the Offers page. The application displays the corresponding list of offers as shown in the following example:



2. Select **Export List** and then, save the file. An Excle file with the list of external offers is downloaded.

To export the offers list from the Offers page, refer to *Exporting Offers List from Offers Page* on page 171.

Deleting External Offers

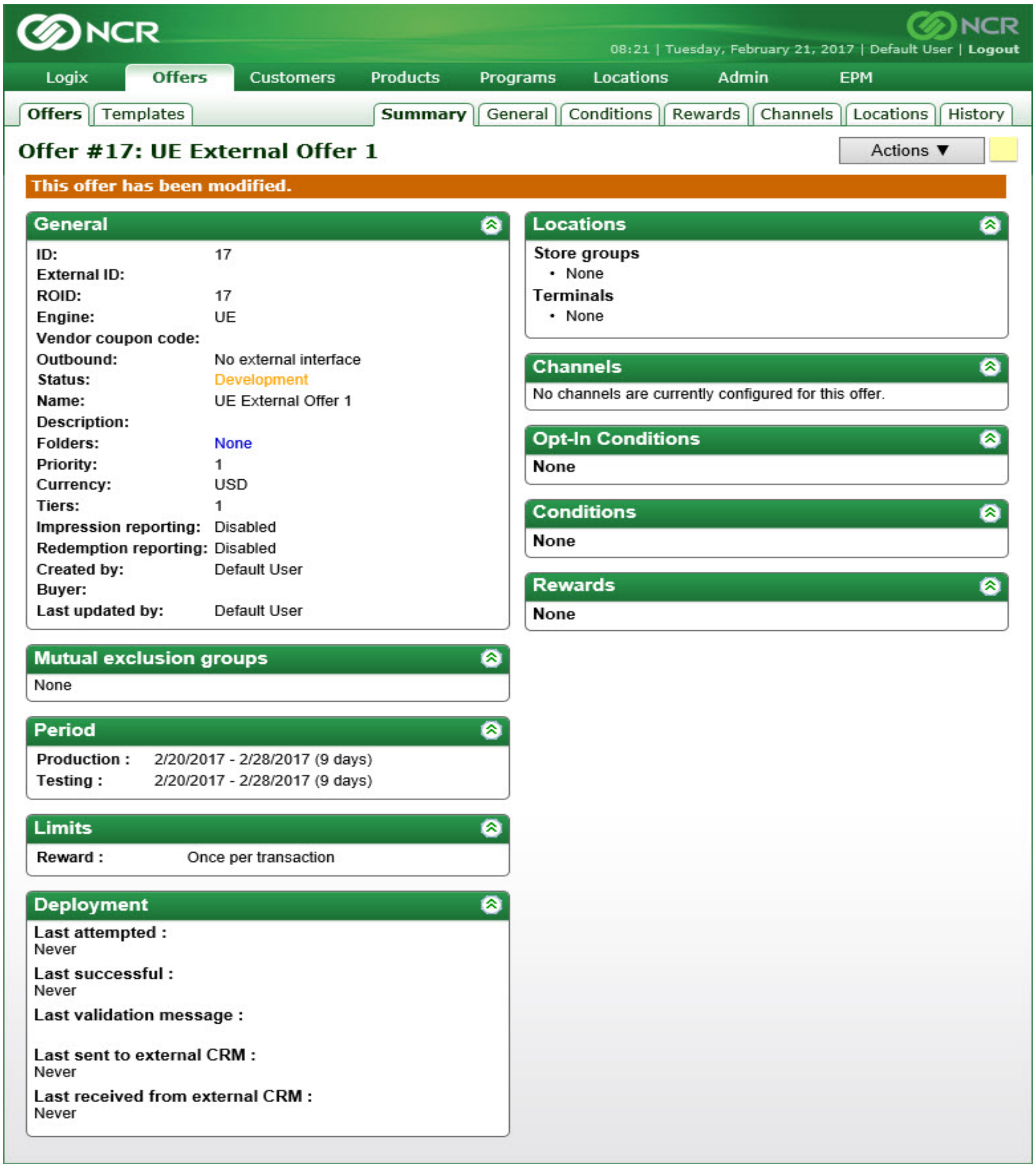
To delete external offers, follow these steps:

1. From the External Offers page, select an offer. The Offer Summary sub–page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**. The external offer is deleted from the External Offers page.

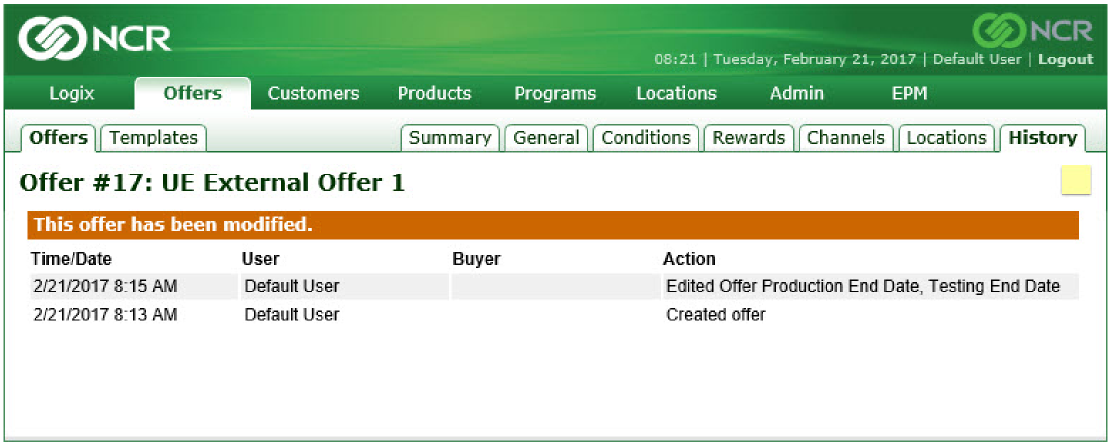
Tracking External Offer Changes

To view the history details of an offer, follow these steps:

1. From the External Offers page, select an offer. The Offer Summary page is displayed.



2. Select the **History** sub–page tab. The application displays the changes made to the template.



Note: Select the **Notes** icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Collision Reports

The Offer Collision Detection feature determines if an offer collides with any existing offers that are either deployed or awaiting deployment. This feature generates Collision Reports.

The Collision Reports page displays a list of offers for which collisions are detected and collision reports exist. The offers listed on this page may or may not be related to each other.

Users can subscribe to the Collision Reports in their email. The email indicates the offers for which the report is generated, the number of colliding products, and a link to view the report. If the offer for which the report is generated is linked to a buyer ID, the email is sent to all the users (including the user who initiated the report) who are mapped to the offer buyer role and who have enabled their notification alert for collision detection.

For information on setting email alerts, refer to *Setting Email Alerts* on page 582. This section provides instructions on how to use the Offer Collision Detection feature.

Enabling Collision Detection

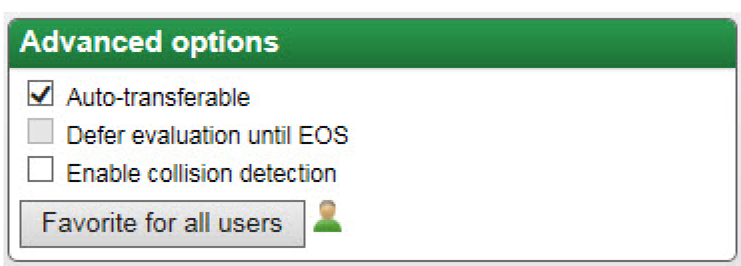
There are two ways to enable the collision detection feature:

- Enabling at the Offer General sub–page
- Enabling the feature by default in the UE settings

Enabling Collision Detection in Offer General sub–page

To enable the feature at the Offer General sub–page, follow these steps:

1. Select any offers from the Offers page and then select the **General** sub–page tab. The Offer General sub–page is displayed.
2. In the Advanced Options, select the **Enable collision detection** check box.

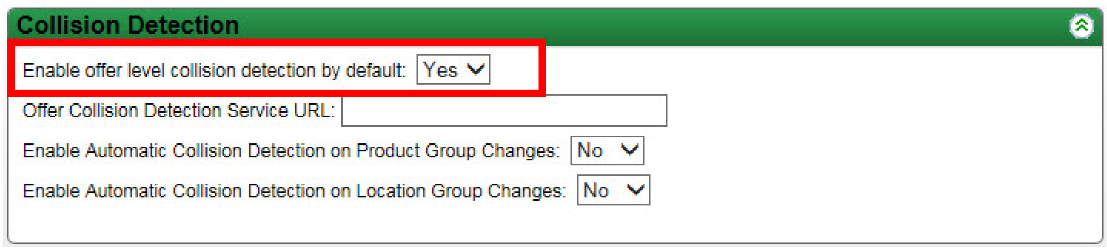


3. Select **Save**.

Enabling Collision Detection by default in UE Settings

The retailer may enable the Collision Detection feature by default for offers that will be created in the future. To enable the Collision Detection feature by default, follow these steps:

1. Log in to **Logix**. The default page is displayed.
2. Select **Admin→Configuration→Settings: UE**. The UE Settings page is displayed.
3. Scroll down the page and locate the **Collision Detection** section.
4. Set the *Enable offer level collision detection by default* option to **Yes**.



5. Select **Save**.

Colliding Offers

The Collision Detection feature detects collisions for an offer. The discounted products of the offer are considered colliding with other offers when another deployed offer has the following characteristics:

- Has overlapping start or end dates.
- Has overlapping store locations.
- Has overlapping terminals.
- Contains the same included product in a discount reward.

Note: The Collision Detection feature does not consider discounts that cover Any Product (such as the basket–level discount type) or entire departments. Furthermore, when evaluating for colliding products, the Collision Detection feature does not include products from the excluded product groups.

Colliding Offers Sample

The retailer has two offers with the following configurations:

Configuration	Offer 1	Offer 2
Date range	**December 1–31, 2016**	**December 1–31, 2016**
Location: Store Group	Grp1 (Stores **S1**, S2, and S3)	Grp1 (Stores **S1** and S4)
Location: Terminal	**T1**	**T1**
Product group in discount reward	PG01 (Products **P1**, **P2**, **P3**, P4, and P5)	PG02 (Products **P1**, **P2**, **P3**, P6, and P7)
Offer state	Deployed	In development

After Offer 2 is deployed, it collides with Offer 1 with a collision count of 3. The collision count indicates the number of discounted products that are in conflict.

Accessing Collision Reports

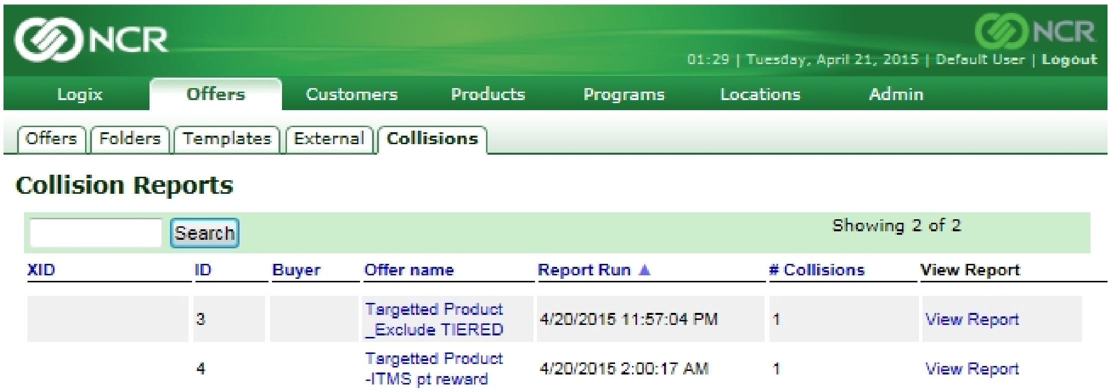
Collision Reports can be accessed from either of the following pages:

- Collision Reports page. For more information, refer to *Accessing Collision Reports from the Collision Reports Page* on the facing page.
- Offer Summary sub–page. For more information, refer to *Accessing Collision Reports from the Offer Builder* on page 120.

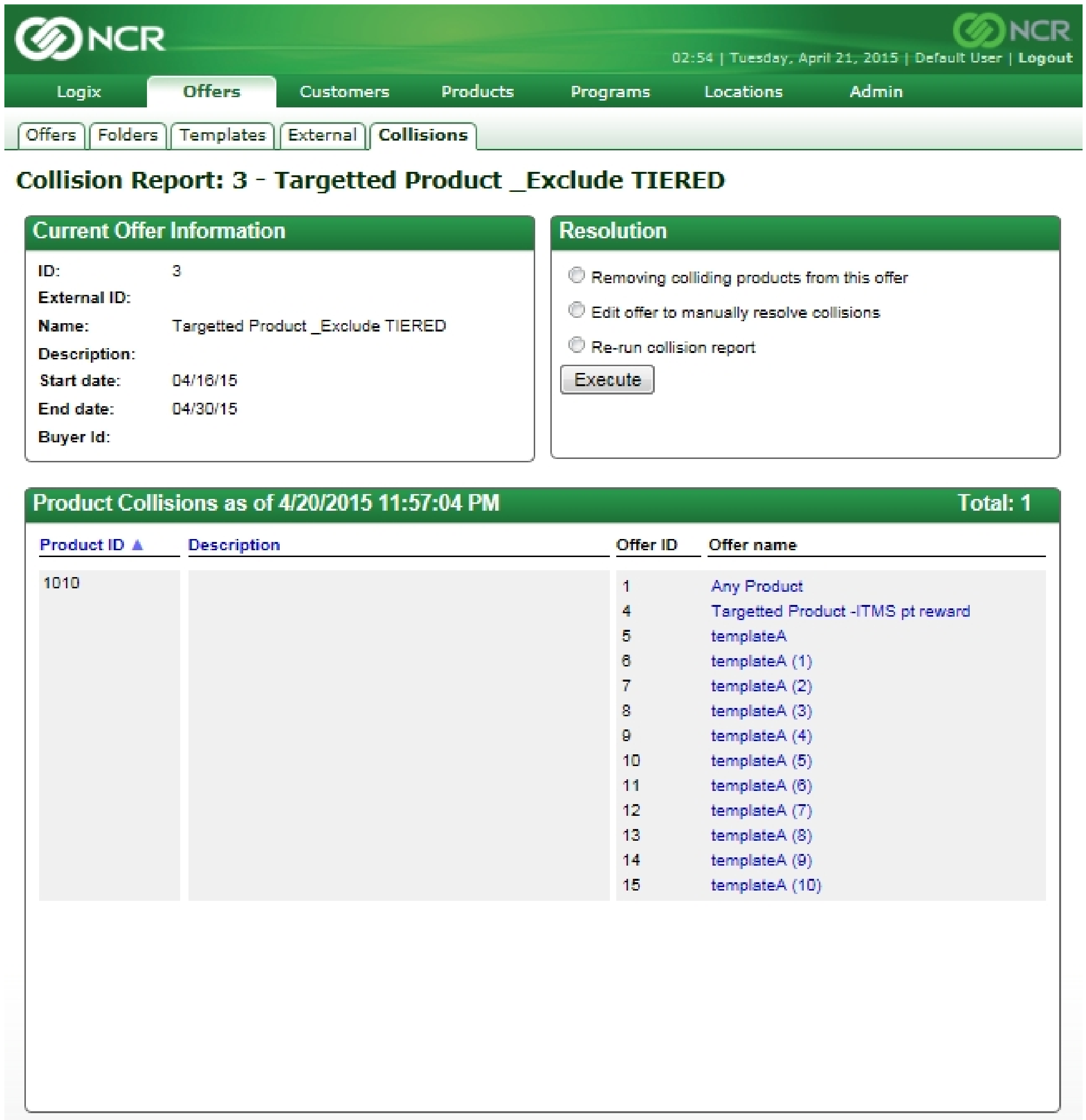
Accessing Collision Reports from the Collision Reports Page

To access an offer Collision Report, follow these steps:

1. From the Offers main tab, select the **Collisions** page tab. The Collision Reports page is displayed.



2. Select an offer's corresponding **View Report** link. The application displays the Collision Report page.



The Collision Report page displays the following sections:

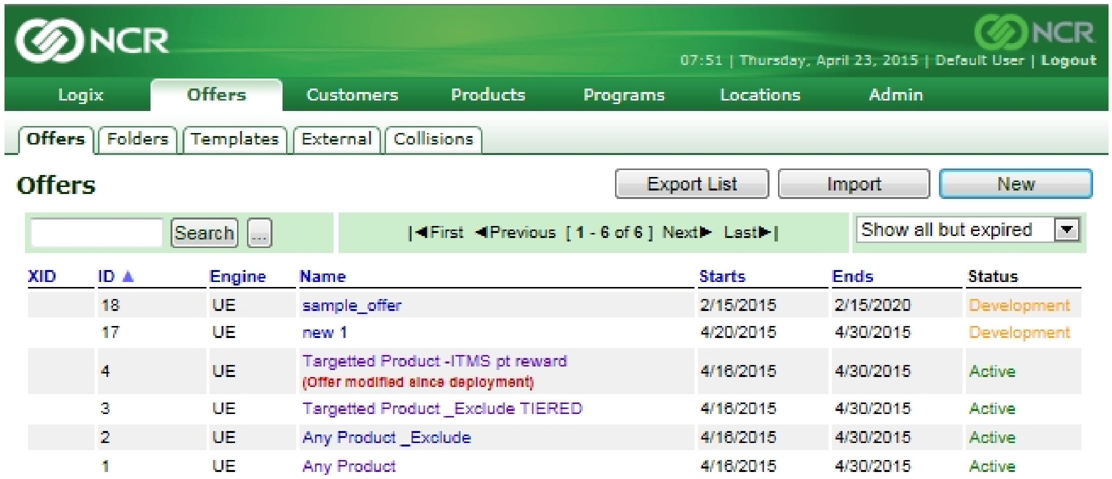
Section	Description
Current Offer Information	Displays information about the offer.
Resolution	Displays the following options to resolve conflicts: • **Removing colliding products from this offer**—removes all colliding products from the product group. **Note:** This option is disabled when all the discounted products of the offer are in conflict, resulting in an empty product group. • **Edit offer to manually resolve collisions**—allows users to manually remove colliding products from the Offer Builder. • **Re–run collision report**—refreshes the information displayed in the Product Collisions section.
Product Collisions	Displays a list of colliding products and colliding offers that discount the products. Selecting an offer name displays the corresponding Offer Summary sub–page.

3. Do any of the following:
   - Automatically remove colliding products. For more information, refer to *Automatically Resolving Collision by Removing Product Group* on page 127.
   - Manually resolve collisions. For more information, refer to *Manually Resolving Collisions* on page 129.
   - Re–run collision reports.

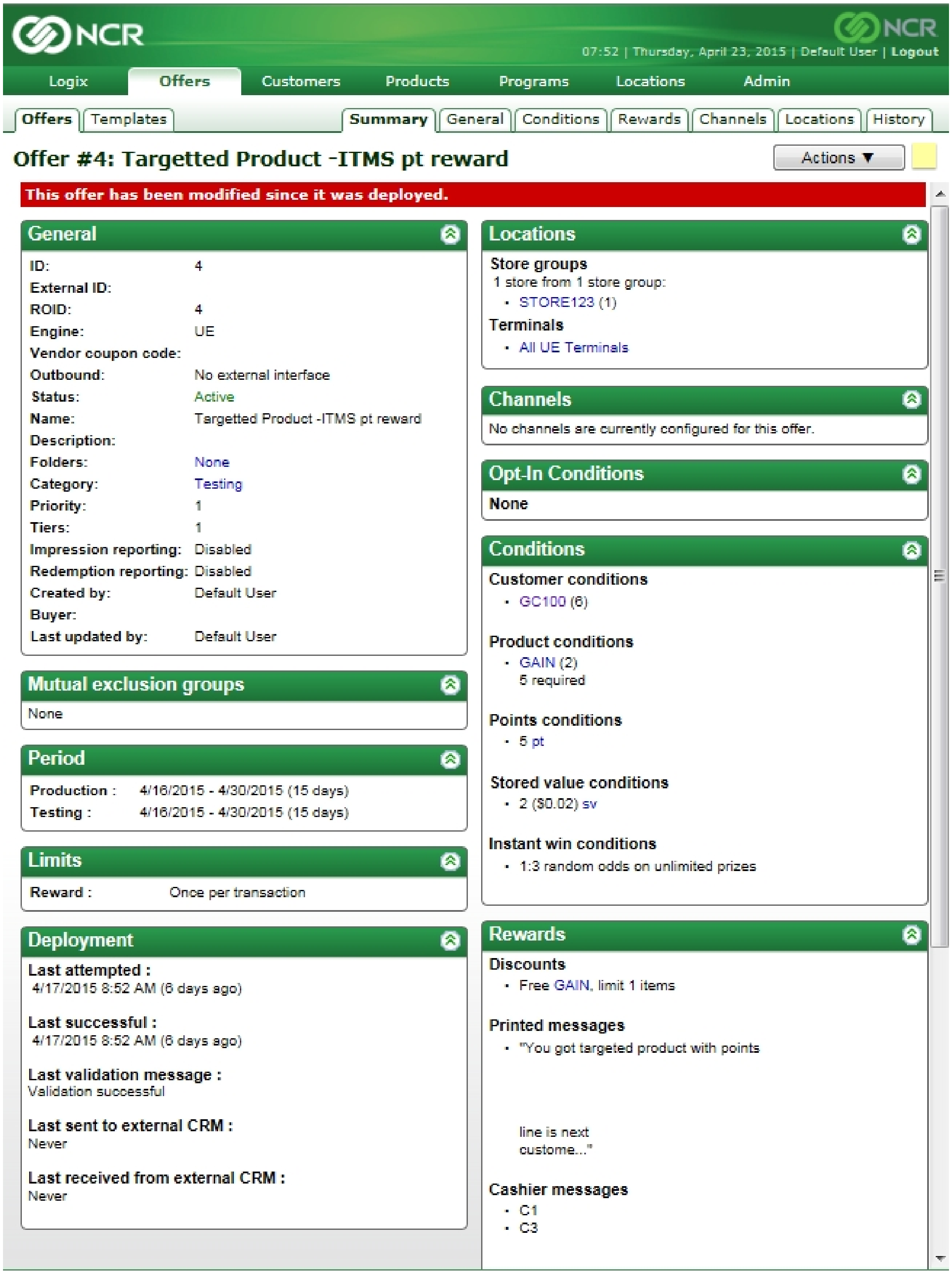
Accessing Collision Reports from the Offer Builder

To access an offer Collision Report, follow these steps:

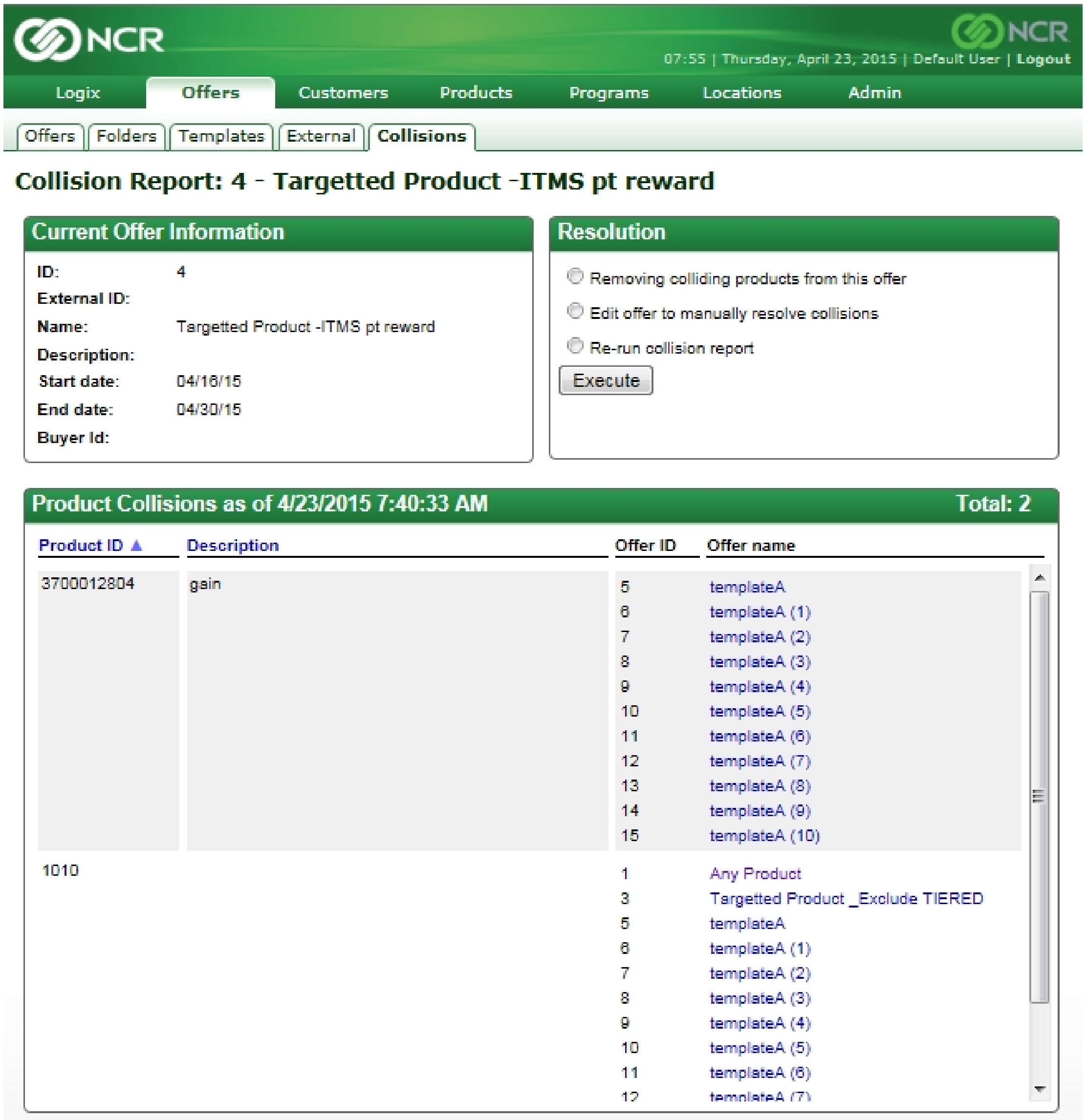
1. Select the **Offers** main tab. The Offers page is displayed by default.



2. Select an offer. The Logix Offer Builder displays the Offer Summary sub–page by default.



3. From the Actions menu, select **View Collision report**. The Collision Report page is displayed.



Note: To enable a notification alert when a colllision detection report is generated, refer to *Setting Email Alerts* on page 582.

The Collision Report page displays the following sections:

Section	Description
Current Offer Information	Displays information about the offer.
Resolution	Displays the following options to resolve conflicts: • **Removing colliding products from this offer**—removes all colliding products from the product group. **Note:** This option is disabled if the resolution that is applied leads to product group empty state. • **Edit offer to manually resolve collisions**—allows users to manually remove colliding products from the Offer Builder. • **Re–run collision report**—refreshes the information displayed in the Product Collisions section.
Product Collisions	Displays a list of colliding products and colliding offers that discount the products. Selecting an offer name displays the corresponding Offer Summary sub–page.

4. Do any of the following:
   - Automatically remove colliding products. For more information, refer to *Automatically Resolving Collision by Removing Product Group* on page 127.
   - Manually resolve collisions. For more information, refer to *Manually Resolving Collisions* on page 129.
   - Re–run collision reports.

Resolving Collisions

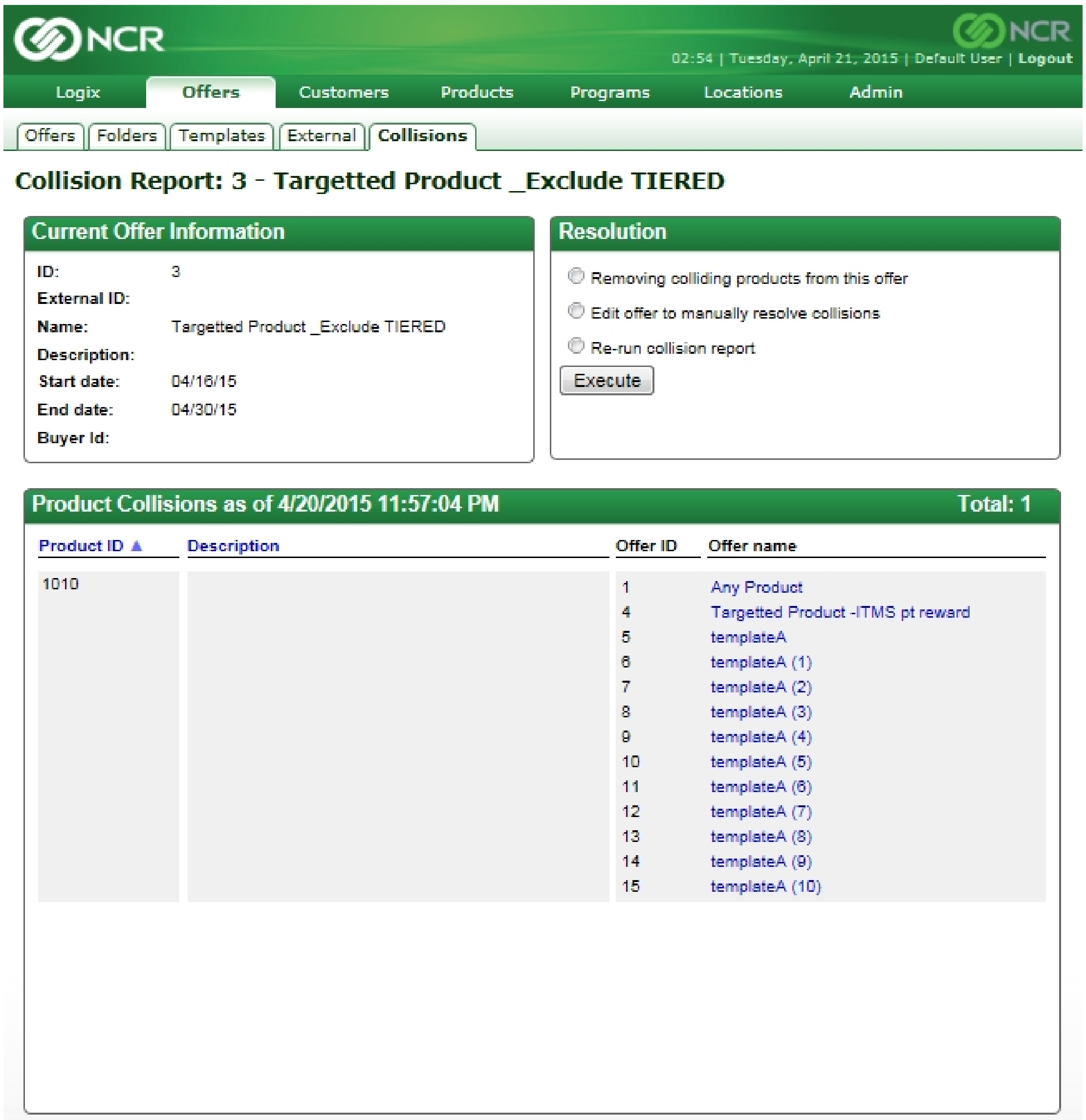
Logix permits users to resolve colliding offers. This section provides procedures on how to resolve collisions.

- Copying Product Group. For more information, refer to *Automatically Resolving Collision by Copying Product Group* on the facing page.
- Removing Product Group. For more information, refer to *Automatically Resolving Collision by Removing Product Group* on page 127.
- Manually resolving collisions. For more information, refer to *Manually Resolving Collisions* on page 129.

Automatically Resolving Collision by Copying Product Group

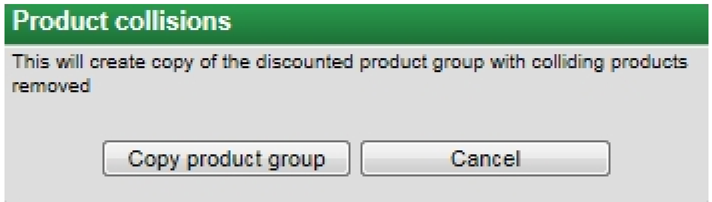
Logix permits users to resolve colliding products if the product group is used as a condition or discount reward in other offers. To remove colliding products from the Collision Report Details page, follow these steps:

1. From the Collision Reports List page, select an offer's corresponding **View Report** link. The application displays the Collision Report details.



Note: To enable a notification alert when a colllision detection report is generated, refer to *Setting Email Alerts* on page 582.

2. From the Resolution section, select **Removing colliding products from this offer**.
3. Select **Execute**. A pop–up window is displayed.



Note: If the current offer’s discounted product group is not used in any other offer and automatic collision resolution for the offer will result in an empty product group, the message "Automatic collision resolution is not available as it will result in empty product group" is displayed. The *Removing colliding products from this offer* option is then disabled.

4. Select **Copy product group**. A copy of the product group is created with colliding products removed and then, the offer is linked with this copy.

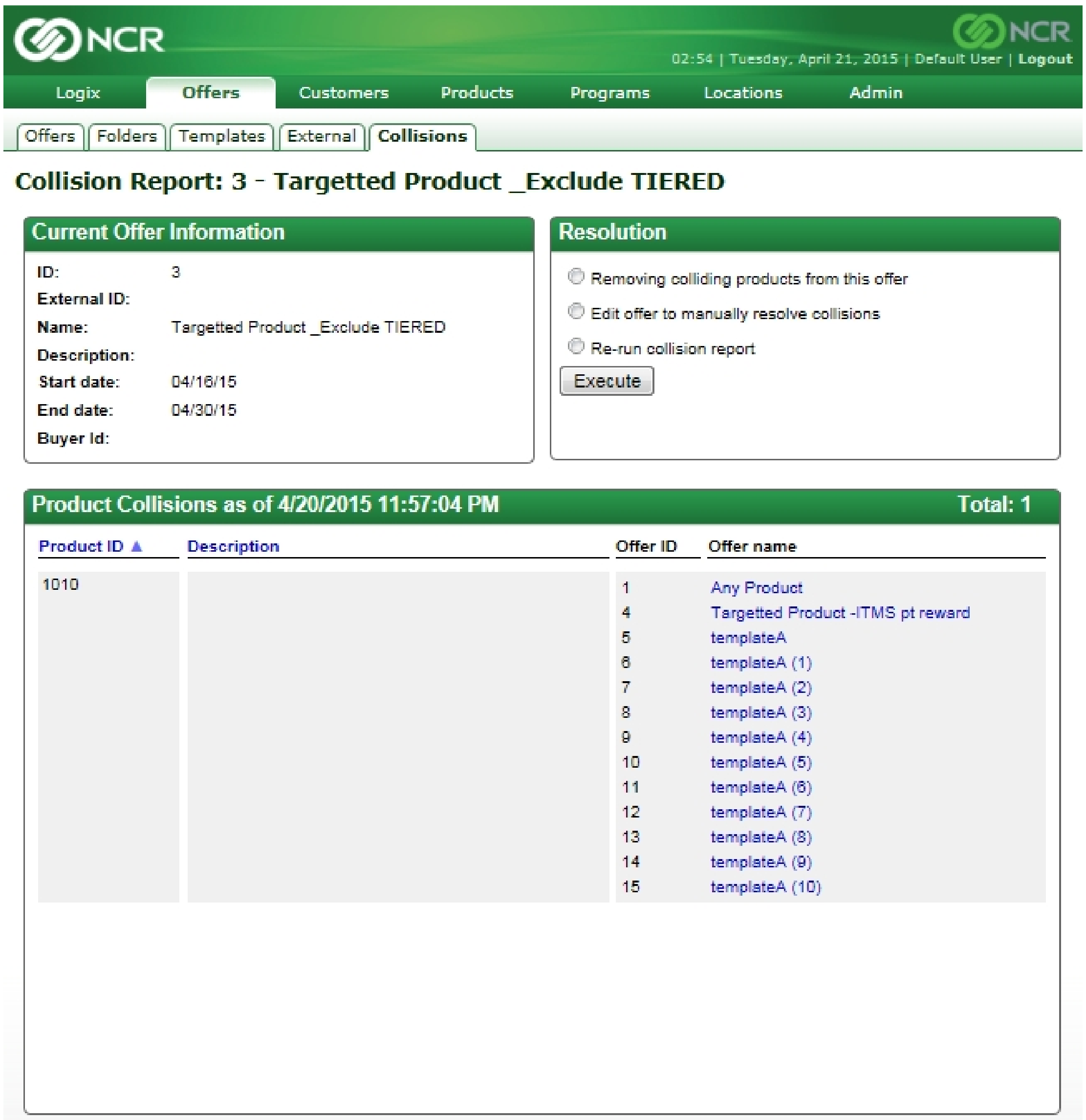
Note: The offer is unlinked from the original product group.

Automatically Resolving Collision by Removing Product Group

Logix permits users to resolve colliding products if the product group is not used in other offers. To remove colliding products from the Collision Report Details page, follow these steps:

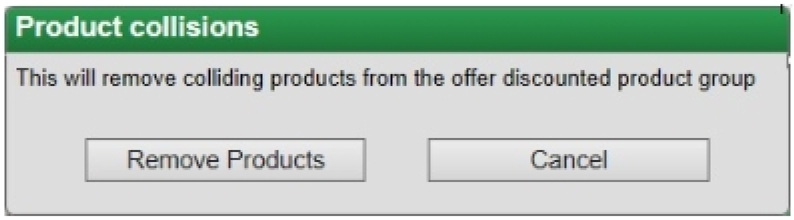
To remove colliding products from the Collision Report Details page, follow these steps:

1. From the Collision Reports List page, select an offer's corresponding **View Report** link. The application displays the Collision Report details.



Note: To enable a notification alert when a colllision detection report is generated, refer to *Setting Email Alerts* on page 582.

2. From the Resolution section, select **Removing colliding products from this offer**.
3. Select **Execute**. A pop–up window is displayed.



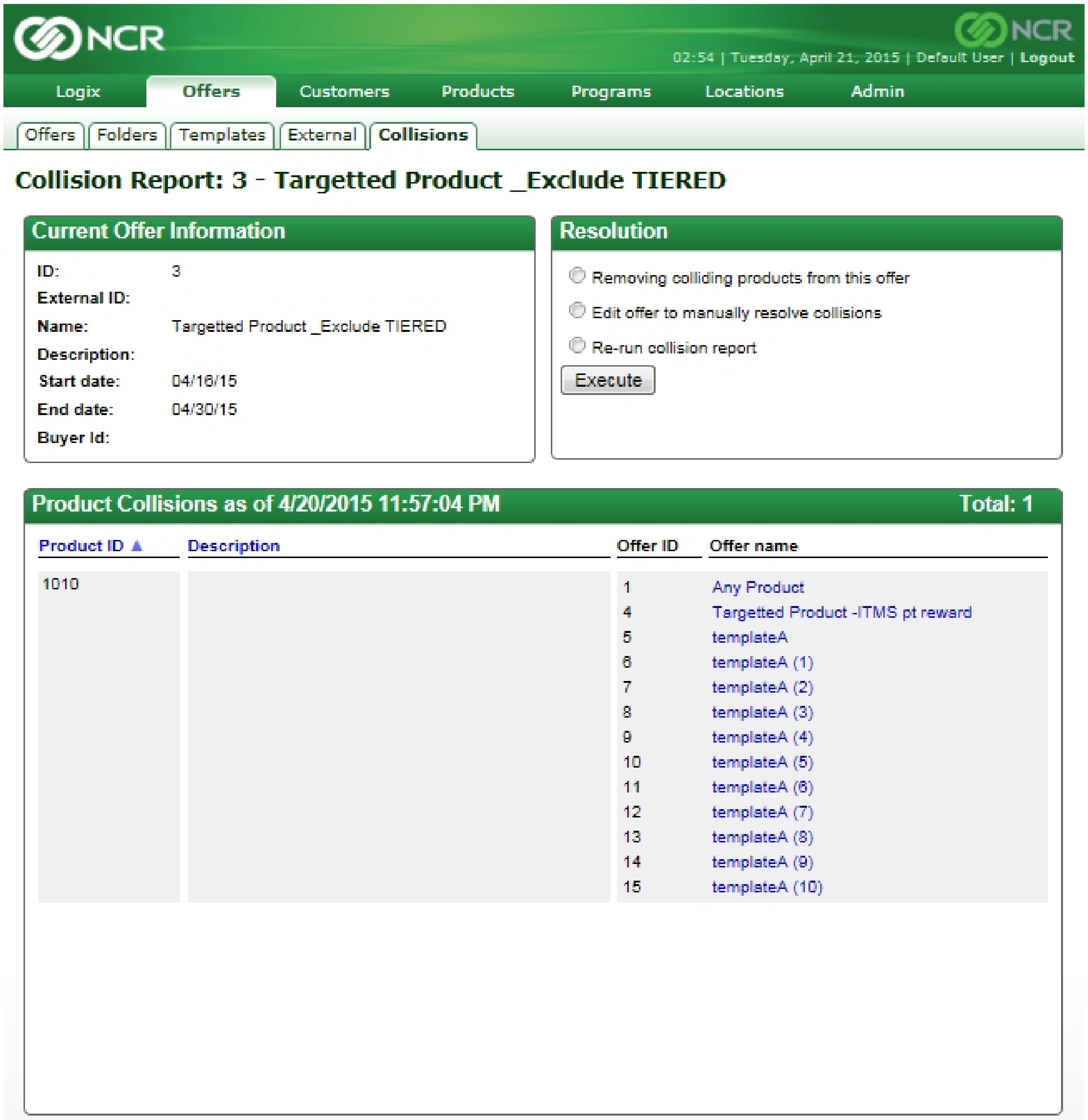
Note: If the current offer's discounted product group is not used in any other offer and automatic collision resolution for the offer will result in an empty product group, the message "Automatic collision resolution is not available as it will result in empty product group" is displayed. The *Removing colliding products from this offer* option is then disabled.

4. Select **Remove Products**. The offer is removed from the original product group.

Manually Resolving Collisions

To manually resolve colliding products from the Collision Report Details page, follow these steps:

1. From the Collision Reports List page, select an offer's corresponding **View Report** link. The application displays the Collision Report details.



Note: To enable a notification alert when a colllision detection report is generated, refer to *Setting Email Alerts* on page 582.

2. From the Resolution section, select **Edit offer to manually resolve collisions**.
3. Select **Execute**. The corresponding Offer General sub–page is displayed.
4. Update the product condition. For more information, refer to *Setting Product Conditions* on page 220.

To determine why offers collide and how to modify them, refer to *Colliding Offers* on page 115.

Offer Approval Workflow

The Offer Approval Workflow feature provides retailers the capability to approve or to reject offers created by Logix users before the offers are deployed.

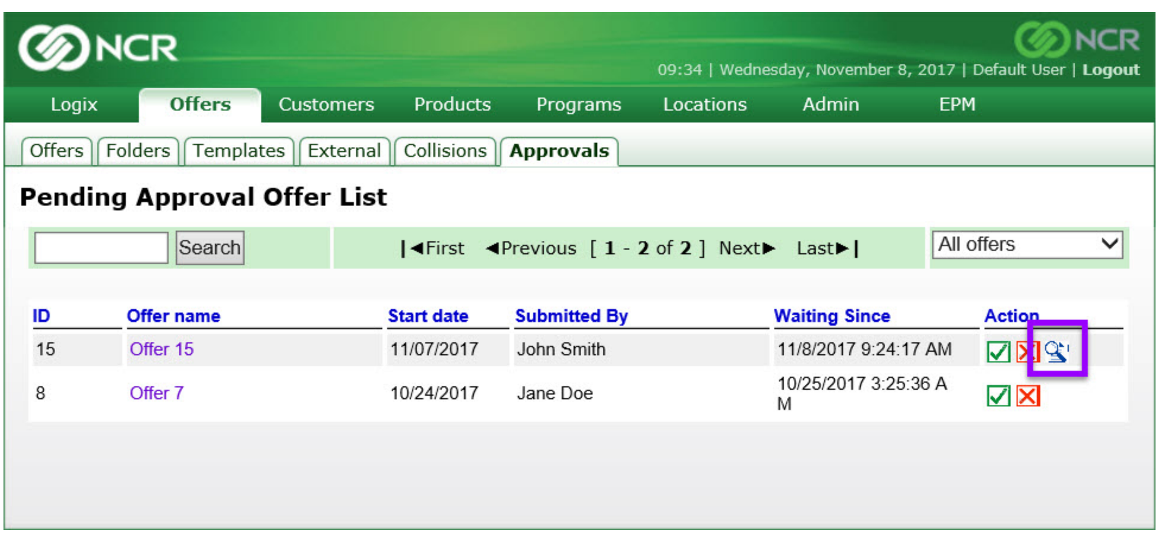
Enable this feature using the Configuration page. For more information, refer to *Offer Approval Workflow* on page 639.

Note: Only users who are assigned with the Approval Manager permission can enable or disable this feature. For more information on offer permissions, refer to *Offers* on page 855.

Pending Approval Offer List page

The Pending Approval Offer List page displays a list of offers that are pending for approval and for which the current user is one of the approvers. The page also displays offers that are deployed in the past at least once and are currently awaiting for approval, even if the offer is already expired. However, offers that are never deployed in the past and are currently awaiting for approval do not display in this page if they are already expired.

If the Collision Detection feature is enabled, and an offer that has collisions is submitted for approval, a collision report icon is included in the Action column of the Pending Approval Offer List page. Selecting this icon displays the Collision Report in the Collisions page. For more information on collision reports, refer to *Collision Reports* on page 113.

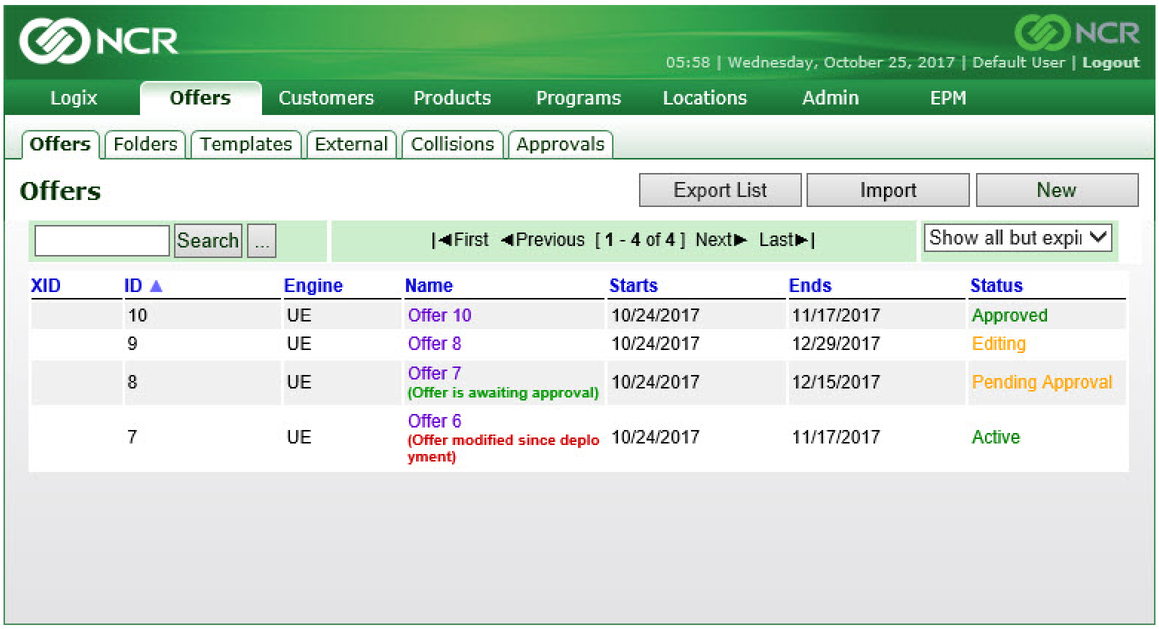


Note: Only users who are assigned with the Offer Approval permission can access this page. For more information about this page, refer to *Approvals Page* on page 37.

Offer approval status

If the Offer Approval Workflow feature is enabled, the status of the offers that are in Development changes to one of the following:

- Editing—when an offer is in Edit mode. This is the status of offers that are not yet submitted for approval and offers that are rejected by the approvers.
- Pending Approval—when an offer is waiting for approval.
- Approved—when an offer is approved and not yet submitted for deployment. When an approved offer is deployed, the offer's status changes to Active.



The offer approval status is displayed both in the Offers page and in the Offer Summary sub-page.

Approving offers

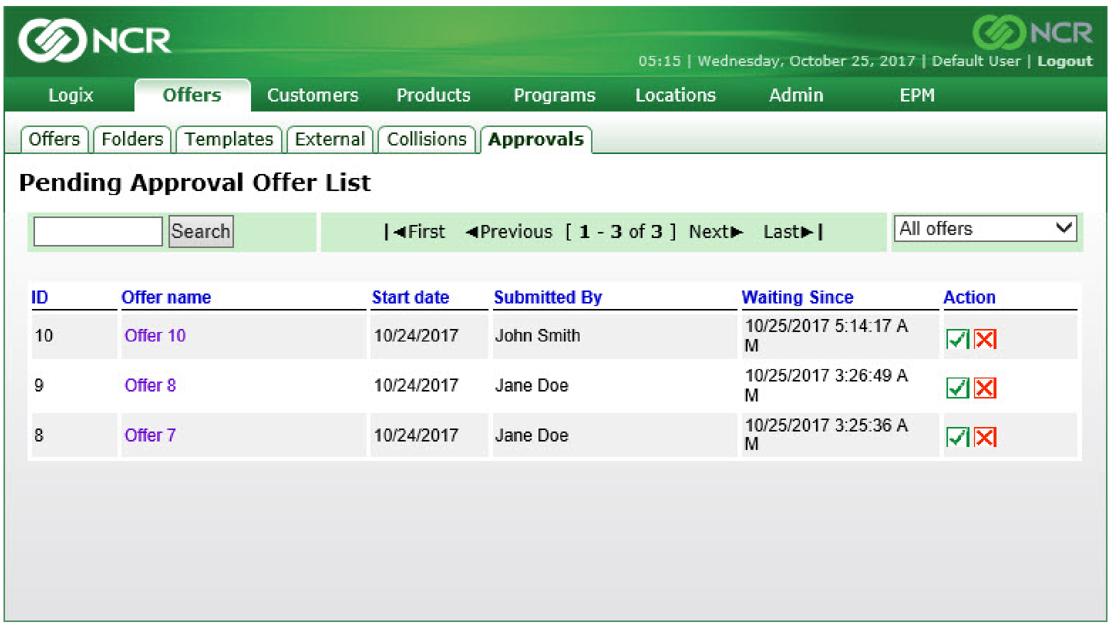
Approvers can approve offers using one of the following ways:

- through the Pending Approval Offer List page
- through the Offer Summary sub-page

Through the Pending Approval Offer List page

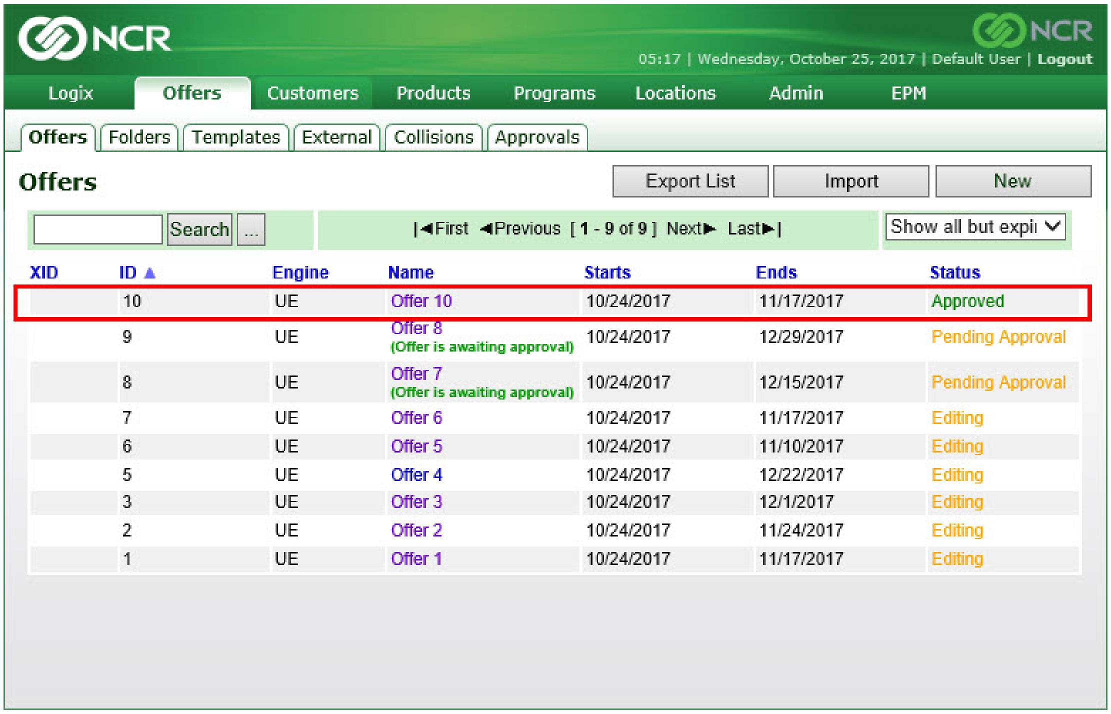
To approve offers using the Pending Approval Offer List, follow these steps:

1. From the Logix UI, select **Offers→Approvals**. The Pending Approval Offer List page is displayed.

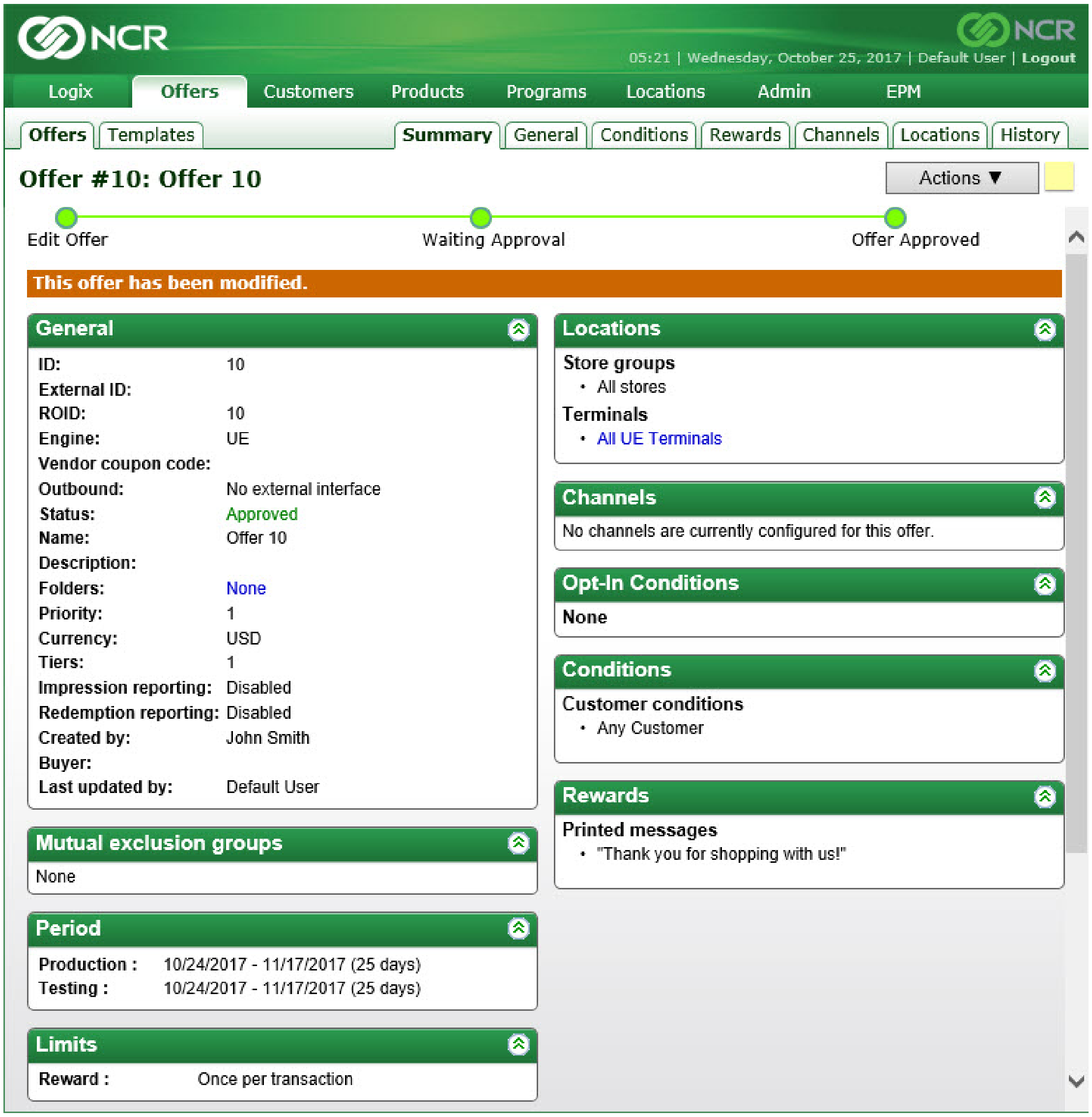


2. In the Action column, select the green check mark (☑) of an offer with pending approval. The offer is approved for deployment and is removed from the Pending Approval Offer List page.

In the Offers page, the approved offer's status displays Approved if the offer is not yet submitted for deployment, as shown in this example.



Selecting the offer name displays the corresponding Offer Summary sub-page with the Status Progress Bar set to Offer Approved.

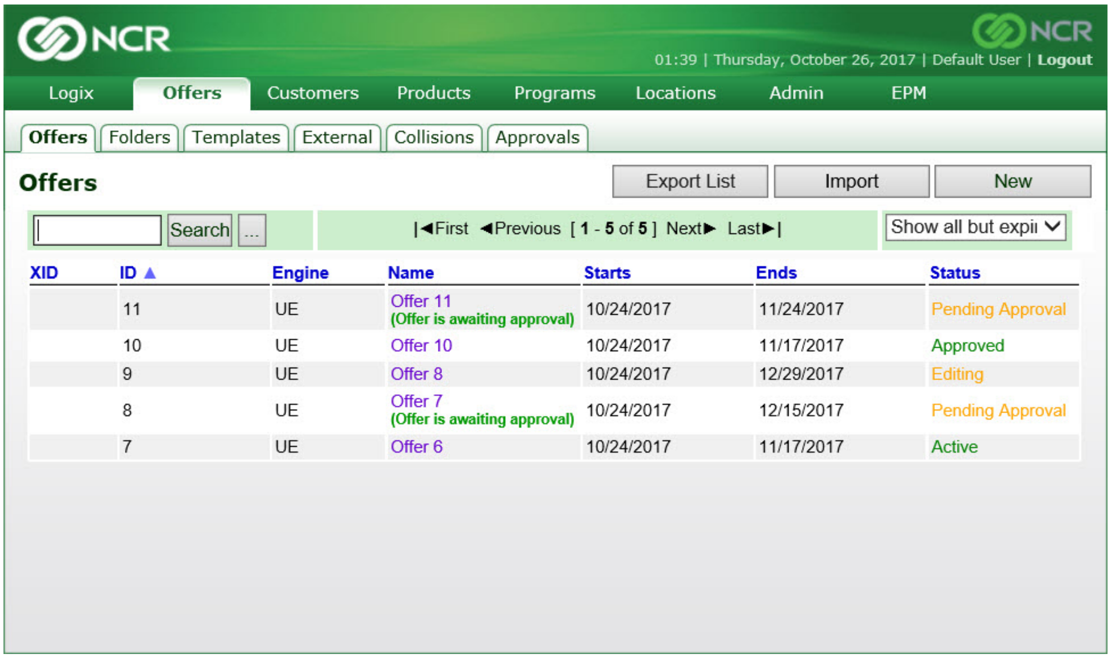


The user may select **Actions→Deploy** to deploy the approved offer.

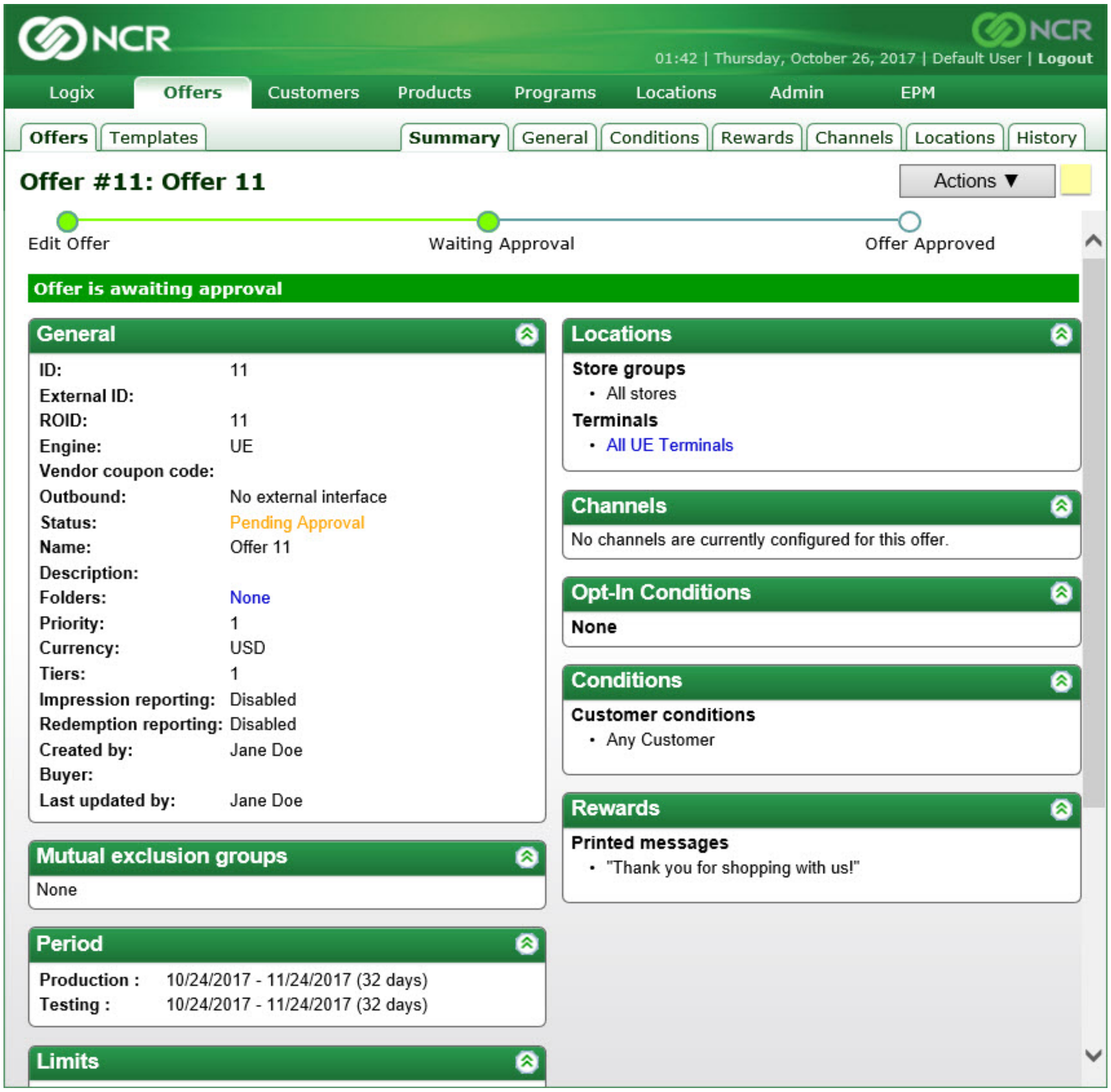
Through the Offer Summary sub-page

To approve offers using the Offer Summary sub-page, follow these steps:

1. In the Logix UI, select **Offers→Offers**, and then select an offer that has the Pending Approval status from the list.

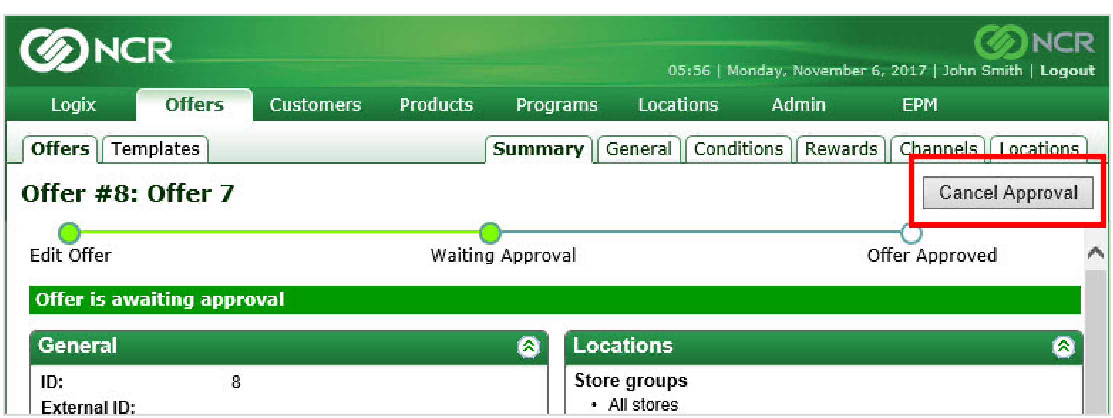


The Offer Summary sub-page is displayed.



2. Select **Actions→Approve offer**. The offer is approved and the Status Progress Bar is set to Offer Approved.

Note: When an offer is waiting for approval, offer approvers sees the options to approve or to reject the offer, while other users see the Cancel Approval option.

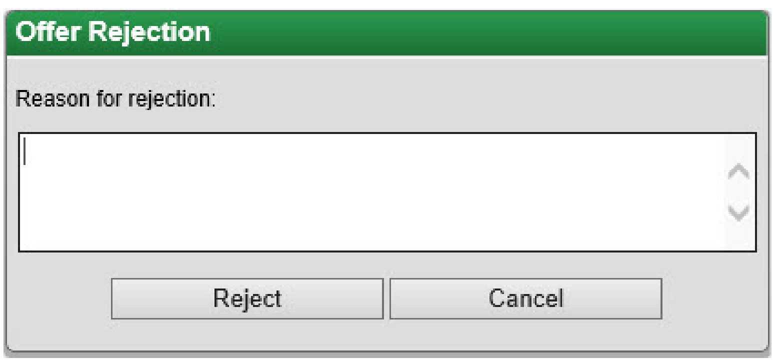


Rejecting offers

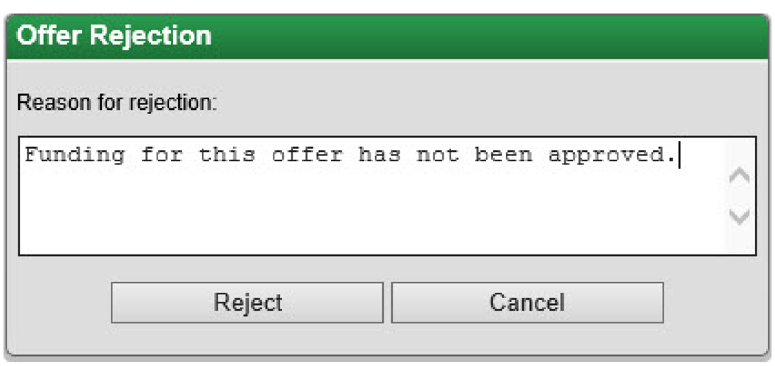
To reject offers that are submitted for approval, follow these steps:

1. From the Logix UI, select **Offers→Approvals**. The Pending Approval Offer List page is displayed.

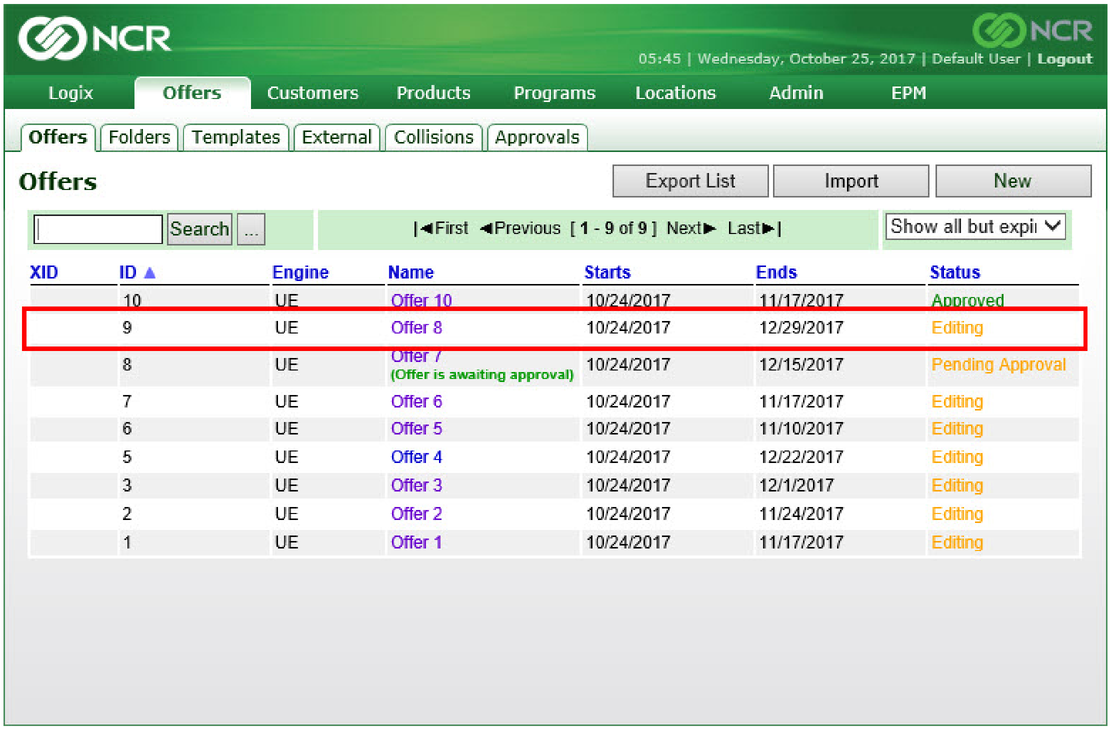
2. In the Action column, select the red X mark () of an offer with pending approval. The Offer Rejection window is displayed.



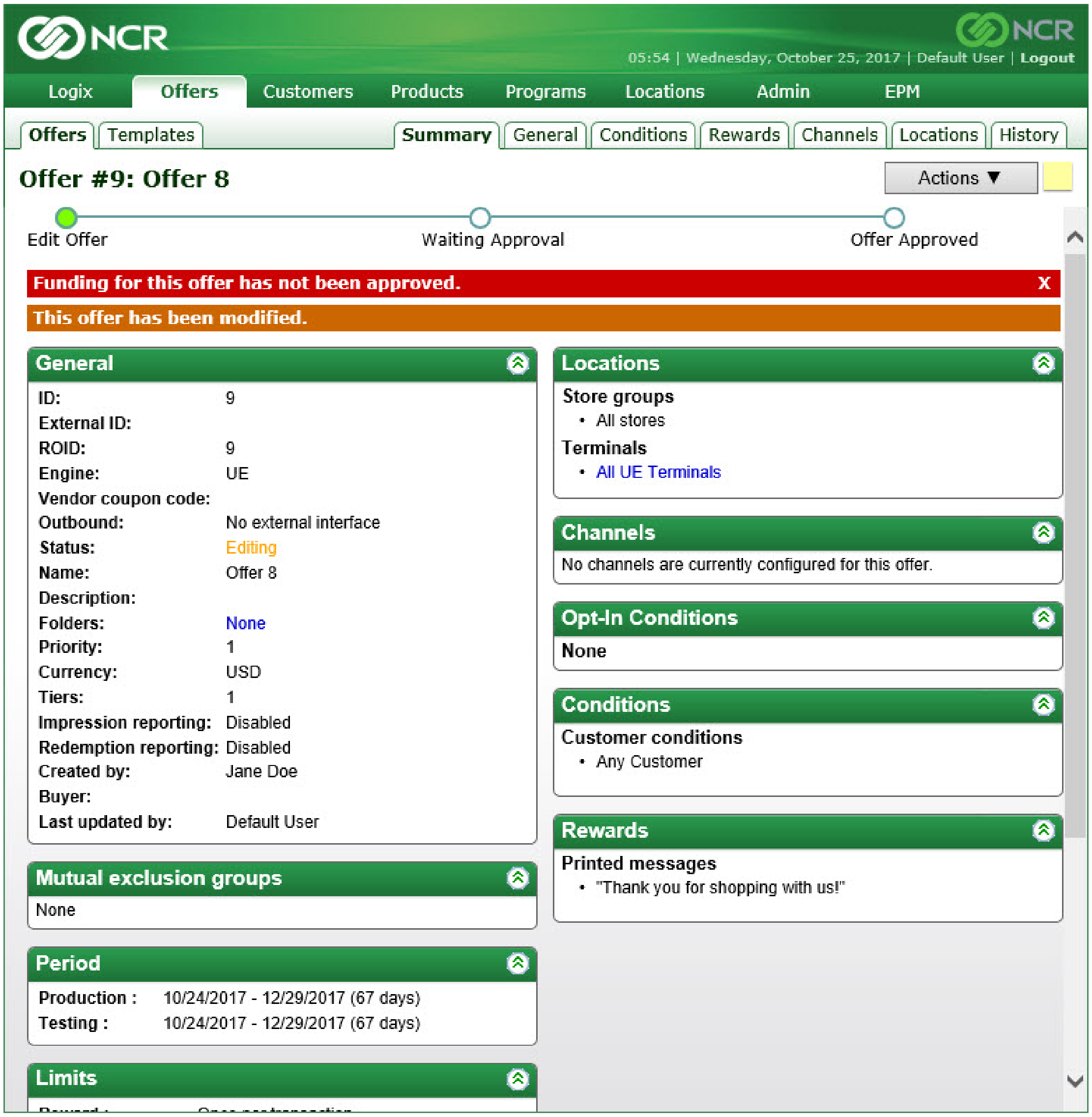
3. Enter a reason for the rejection, and then select **Reject**.



The offer is rejected and is removed from the Pending Approval Offer List page. In the Offers page, the rejected offer's status displays Editing.



Selecting the offer name displays the corresponding Offer Summary sub-page with the Status Progress Bar set to Edit Offer and the reason for the offer's rejection.



Note: Approvers may also reject offers through the Offer Summary sub-page by selecting **Actions→Reject offer**.

Email Alerts

The AMS system provides an option to enable or to disable email alerts for the offer approval workflow feature.

Note: Only users who have enabled the option to receive the email alerts for this feature can receive the email alerts. To set email alerts for this feature, refer to *Setting Email Alerts* on page 582.

Email alerts are sent during the following events and to the following corresponding users:

Event	Alert Receiver	Alert Contents
An offer is submitted for approval	All users who are defined as approver for the offer	• Message that says a new offer is pending for approval • Link to the Pending Approval Offer List page displaying the list of pending approval offers for the user
An offer waiting for approval is rejected	User who submitted the offer for approval	• Message indicating that the offer has been rejected • Offer name and ID • Name of the approver who rejected the offer
An offer waiting for approval is approved	User who submitted the offer for approval	• Message indicating that the offer has been approved • Offer name and ID • Name of the approver who approved the offer
When the content of a product group, a store group, or a customer group that is used in an approved offer is changed from the UI **Note:** Automatic changes to these groups, such as automatic updates through hierarchy, attribute, or analytics changes, do not trigger an email alert.	Approver of the offer	• Message indicating that the contents of the product group, the store group, or the customer group has changed • Offer name and ID

Event	Alert Receiver	Alert Contents
A user other than the user who submitted an offer for approval has canceled the offer approval	User who submitted the offer for approval	• Message indicating that the offer approval has been canceled • Offer name and ID • Name of the user who clicked the Cancel Approval button

Chapter 4: Using the Logix Offer Builder

Overview

The Logix Offer Builder is a set of pages and tools that permits users to create and configure offers. This chapter describes how to configure offers using a range of condition and reward criteria.

Note: For the procedures on building offers, refer to *Building Offer Procedures* on page 6.

To configure offers, do the following:

1. Specify offer parameter values. For more information, refer to *Defining Offer Parameters* on the next page.
2. Determine when to trigger offers by setting offer conditions. For more information, refer to *Offer Conditions* on page 193.
3. Determine the customer groups that are eligible to opt–in or opt–out of an offer by setting eligibility conditions. For more information, refer to *Eligibility Conditions* on page 249.

   Note: Eligibility conditions are optional.

4. If applicable, specify the items that are granted or actions to perform when offer conditions are met. For more information, refer to *Offer Rewards* on page 261.
5. Specify how to distribute offer data to notify customers of upcoming and existing offers. For more information, refer to *Offer Channels* on page 339.
6. Determine the location where the offer is available to customers. For more information, refer to *Configuring Offer Locations* on page 509.

Defining Offer Parameters

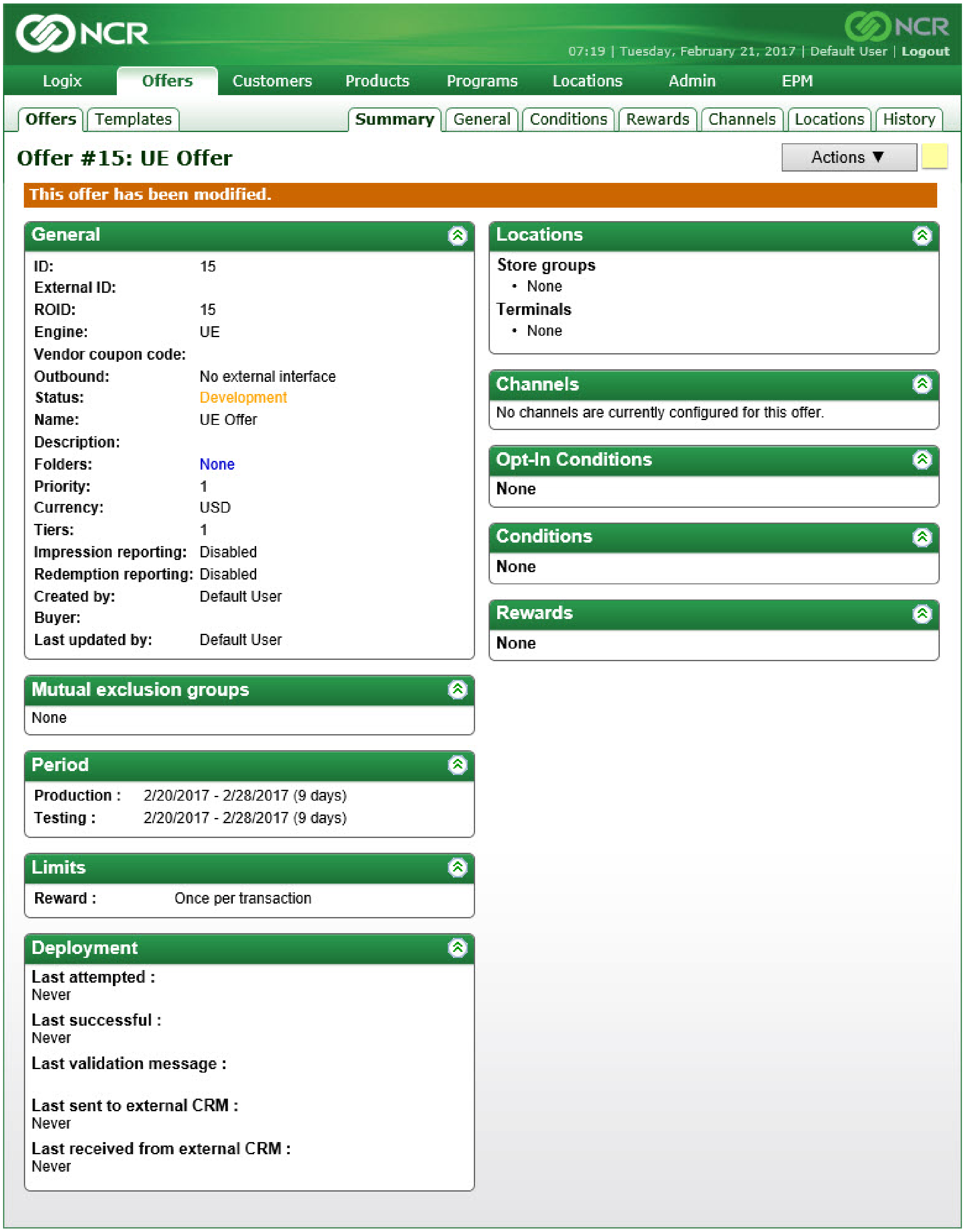
This procedure assumes that the following tasks are completed:

- Creating an offer.
- Configuring offer elements.

For more information, refer to *Building Offer Procedures* on page 6.

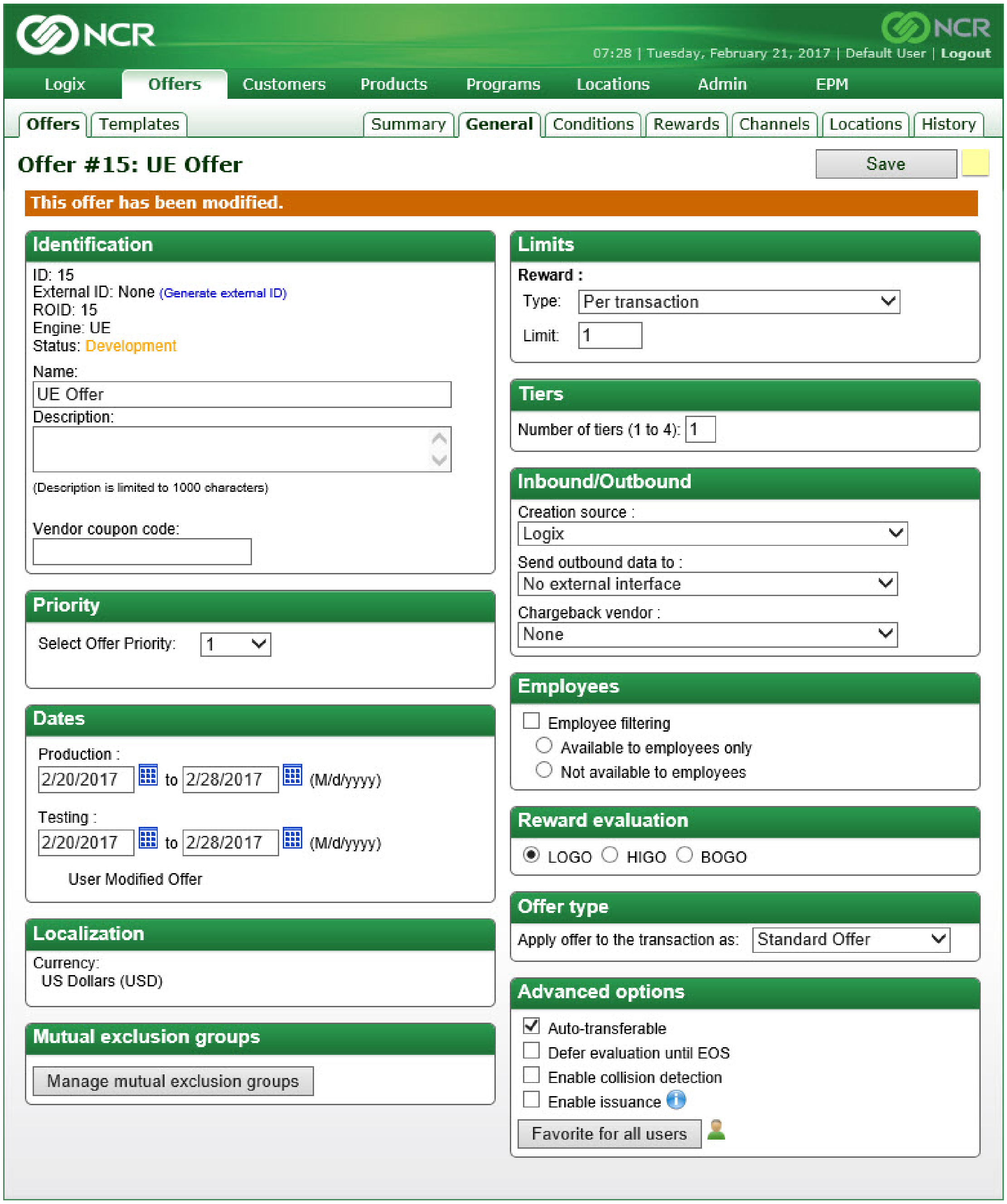
To define offer parameters, follow these steps:

1. From the Offers page, select an offer name. The corresponding Offer Summary sub–page is displayed.



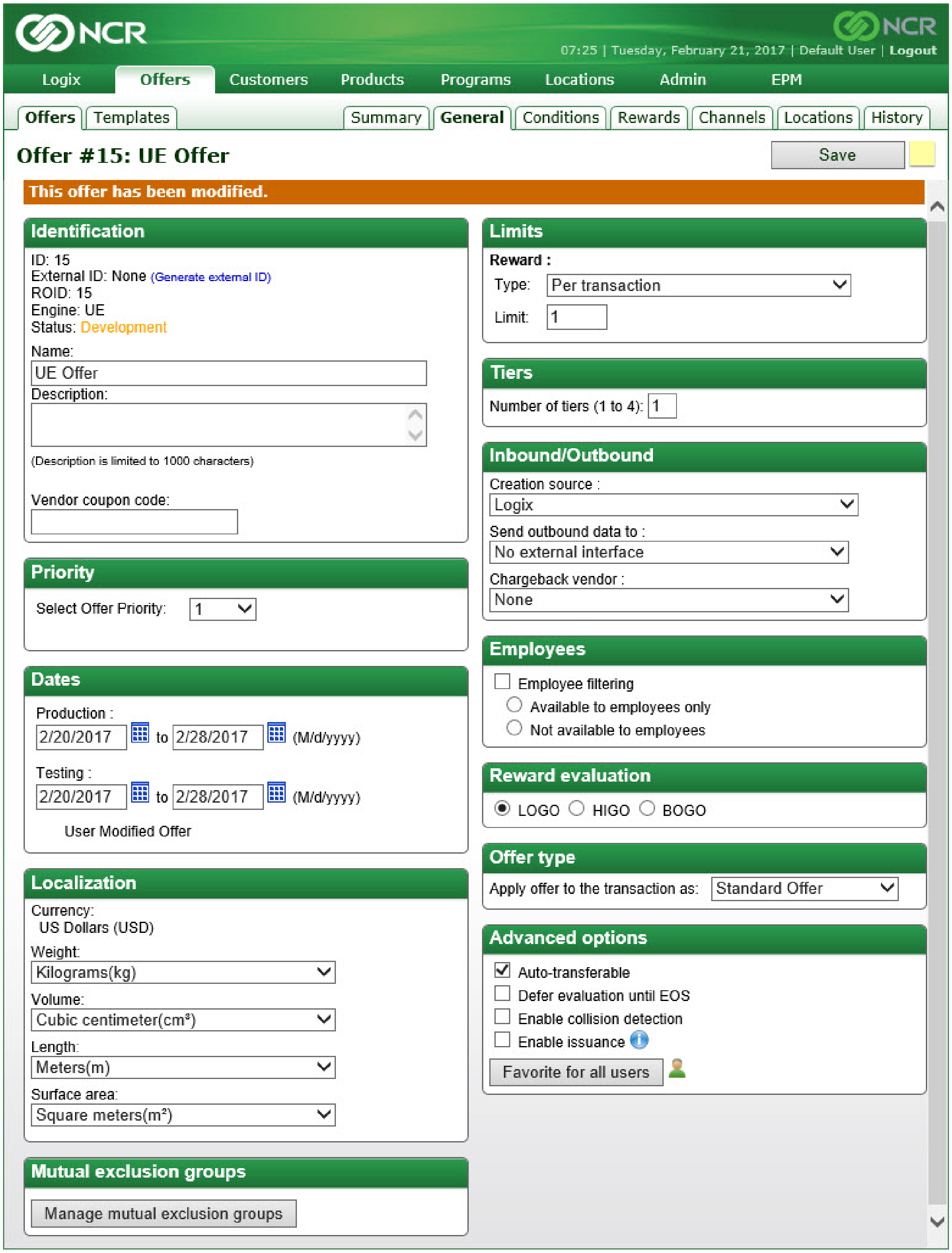
Note: For more information, refer to *Offer Summary Sub–page* on page 53.

2. Select the **General** sub–page tab. The Offer Configuration sub–page is displayed.



3. When necessary, modify or enter the parameter values in the corresponding parameter boxes. For more information, refer to *Offer Configuration Sub–page* on page 56.

Note: If the multi unit of measure setting is enabled and Units of Measure (UOM) sets are configured in the system, the Localization pane displays these units of measure.



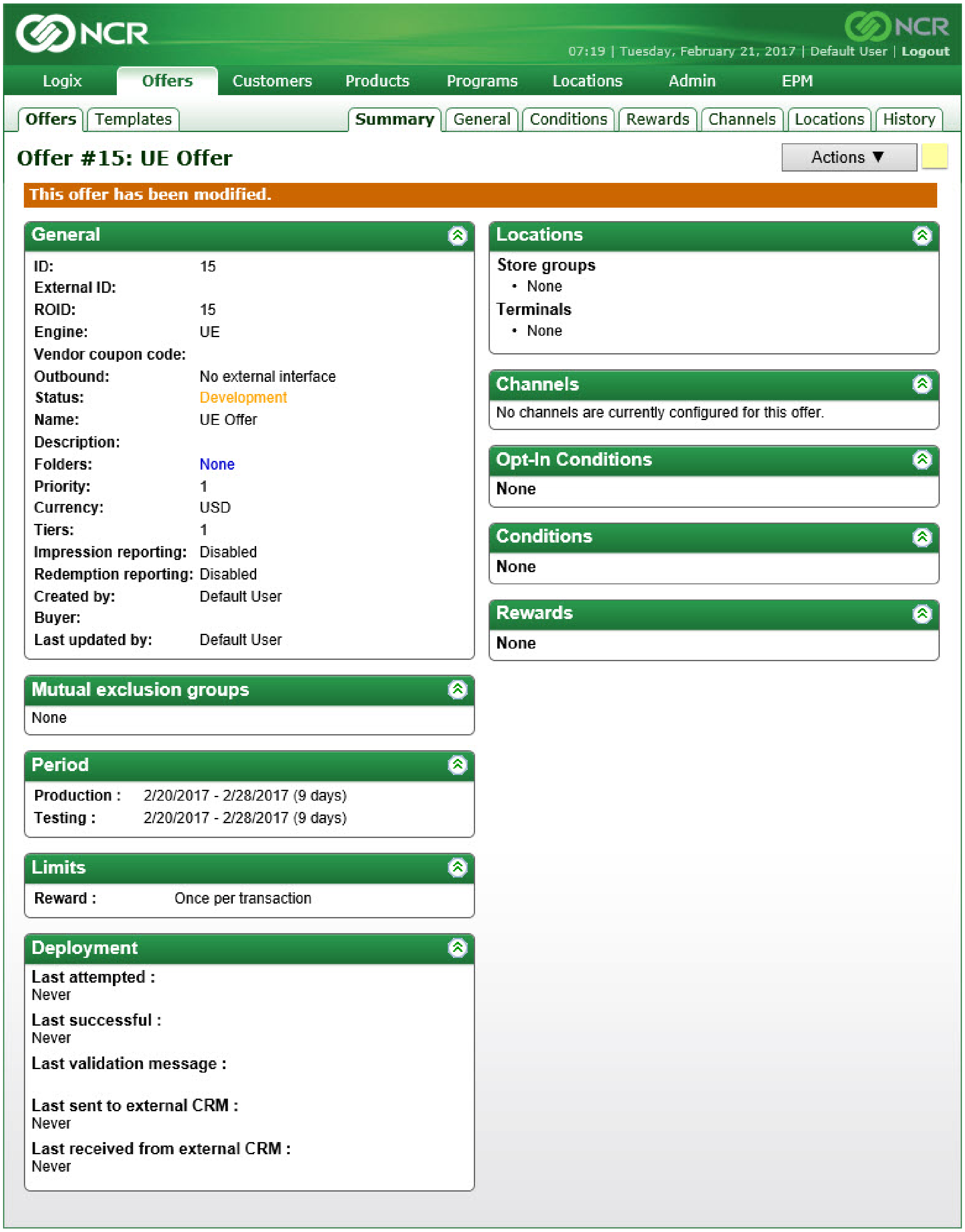
Select the specific unit of measure types to use for weight, volume, length, and surface area.

4. Set the offer characteristics in the corresponding Offer sub–pages. To set these characteristics, refer to the corresponding sections in this chapter.
5. Select the **Save** button on the top–right corner of the page. The Offer Configuration sub–page displays the offer status in the Status Bar.

Associating Offers with Mutual Exclusion Groups

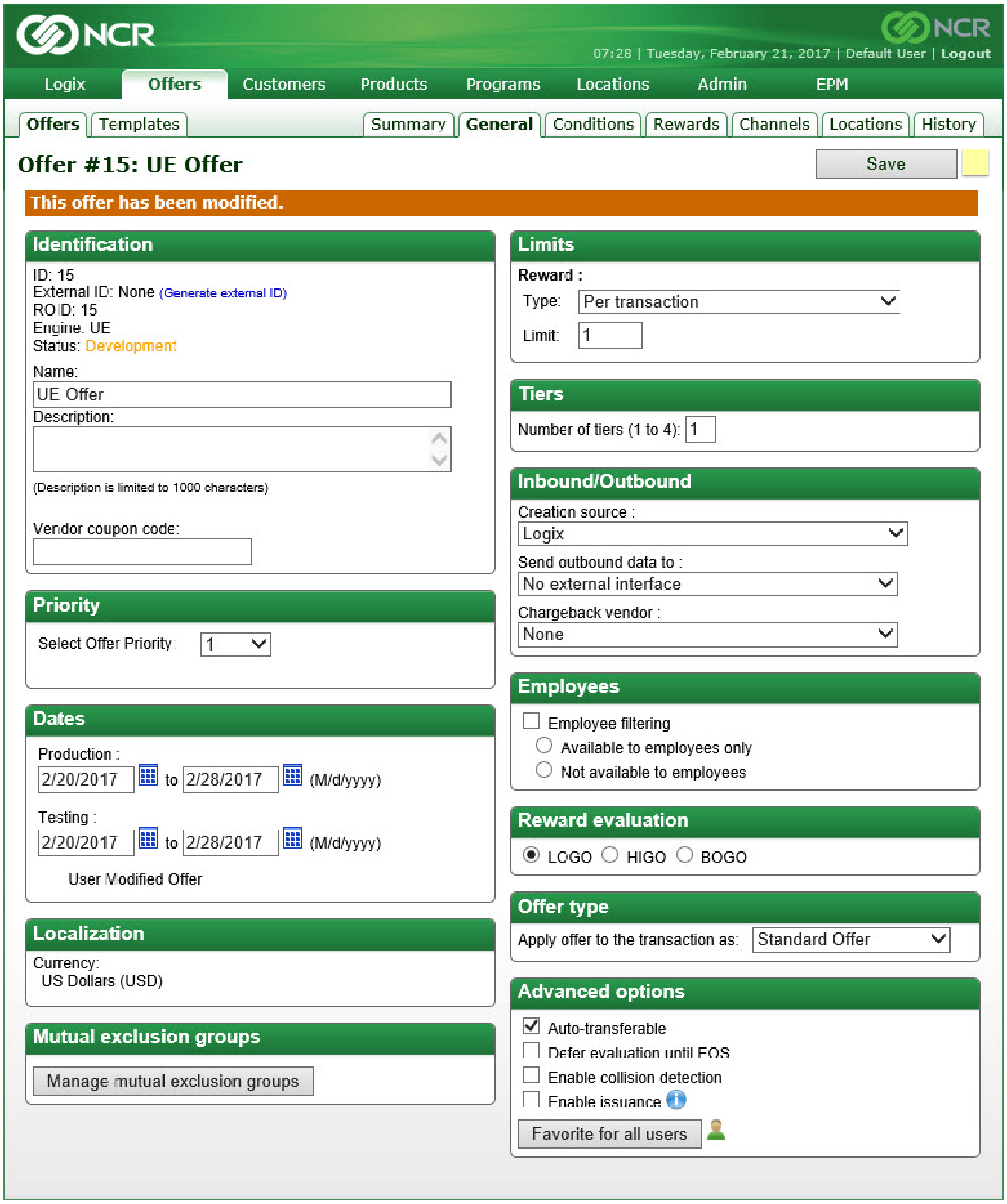
To associate an offer with a mutual exclusion group, follow these steps:

1. From the Offers page, select an offer name. The corresponding Offer Summary sub–page is displayed.



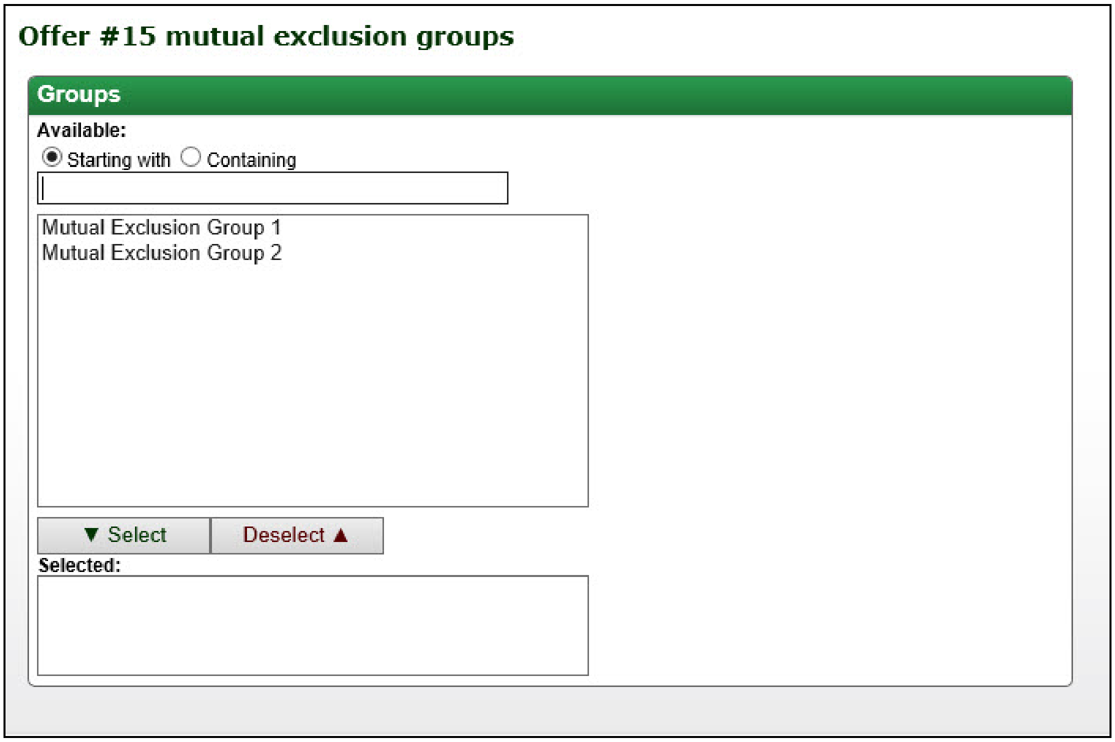
Note: For more information, refer to *Offer Summary Sub–page* on page 53.

2. Select the **General** sub–page tab. The Offer Configuration sub–page is displayed.



Note: For more information, refer to *Offer Configuration Sub–page* on page 56.

3. From the Mutual exclusion groups box, select the **Manage mutual exclusion groups** button. The following window is displayed.



Note: For more information, refer to *Mutual Exclusion Groups* on page 644.

4. Highlight a mutual exclusion group and then, use the **Select** button to associate the offer with the group. The selected group is displayed in the Selected group text box.

5. Close the Mutual Exclusion Groups window. The Offer Configuration sub–page displays the selected group in the Mutual Exclusion Groups box.

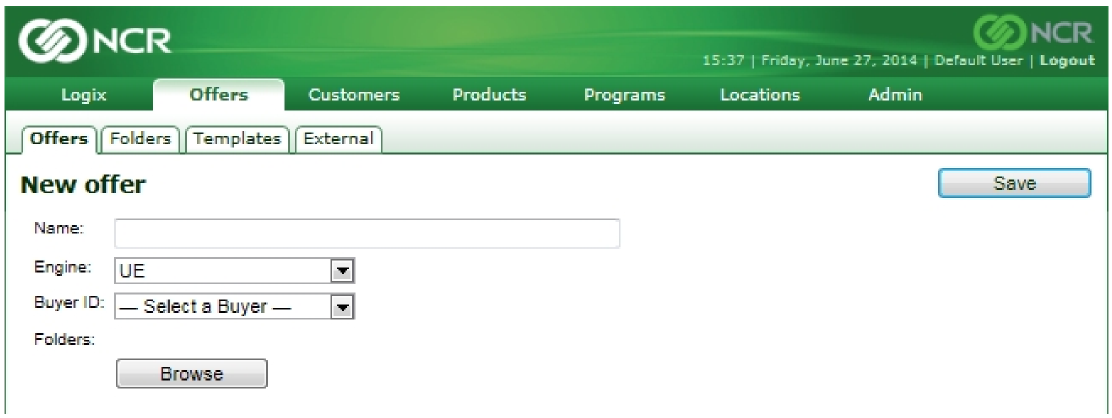
Offers

This section provides instructions on how to create and manage offers.

Creating New Offers

To create a new offer, follow these steps:

1. From the Offers page, select **New**. The following page is displayed.



Note: If the Buyer ID field is not available, create a Buyer. For more information, refer to *Creating Buyers* on page 622.

2. Enter the details in the following fields:

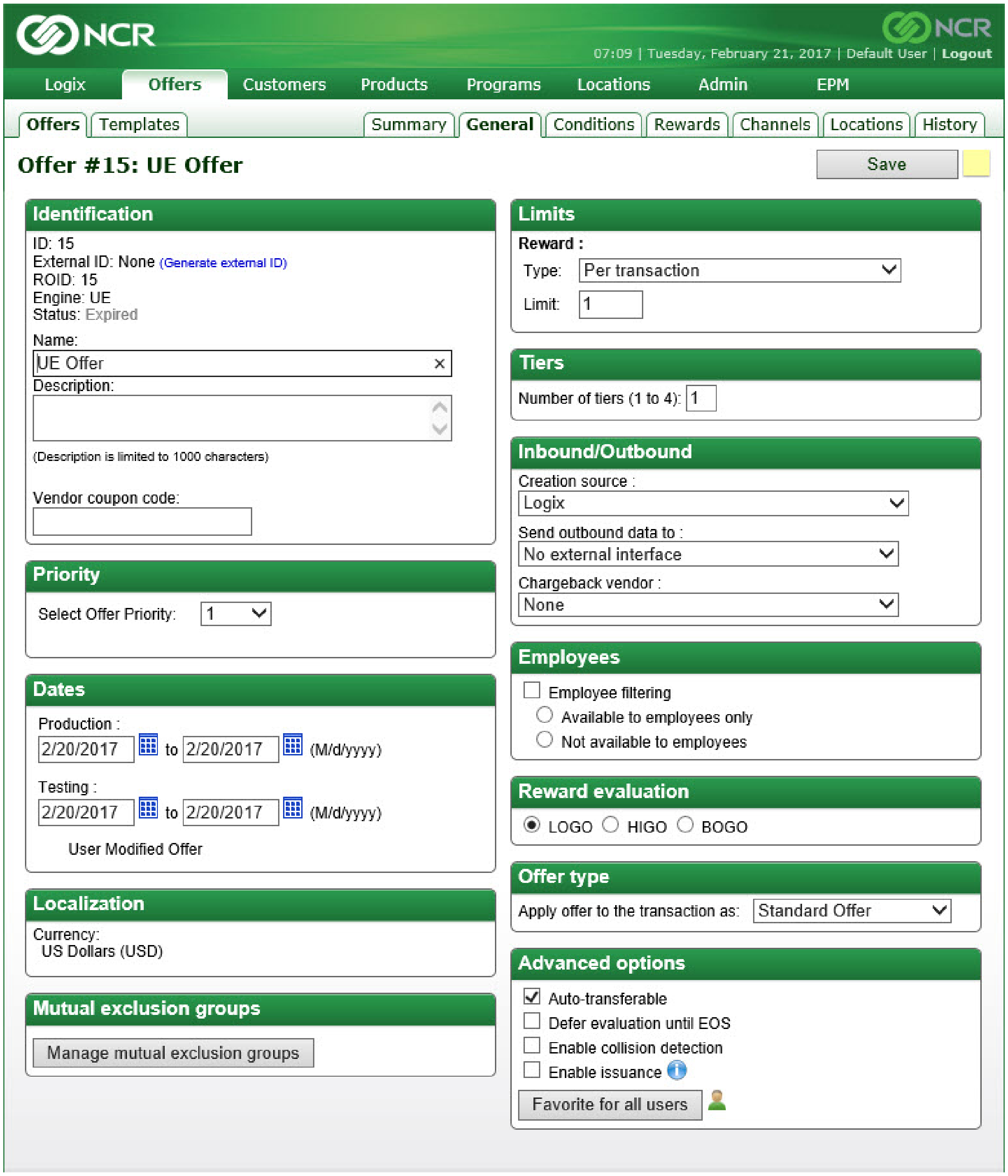
- **Name**—name of the offer.
- **Engine**—the promotion engine.
- **Buyer ID**—the buyer role with which the offer is associated.

Note: Associating users with buyers is optional. If the user is associated with a buyer role, which has a specified default folder, that folder will be pre–selected. The buyer role default folder takes precedence over the engine default folder.

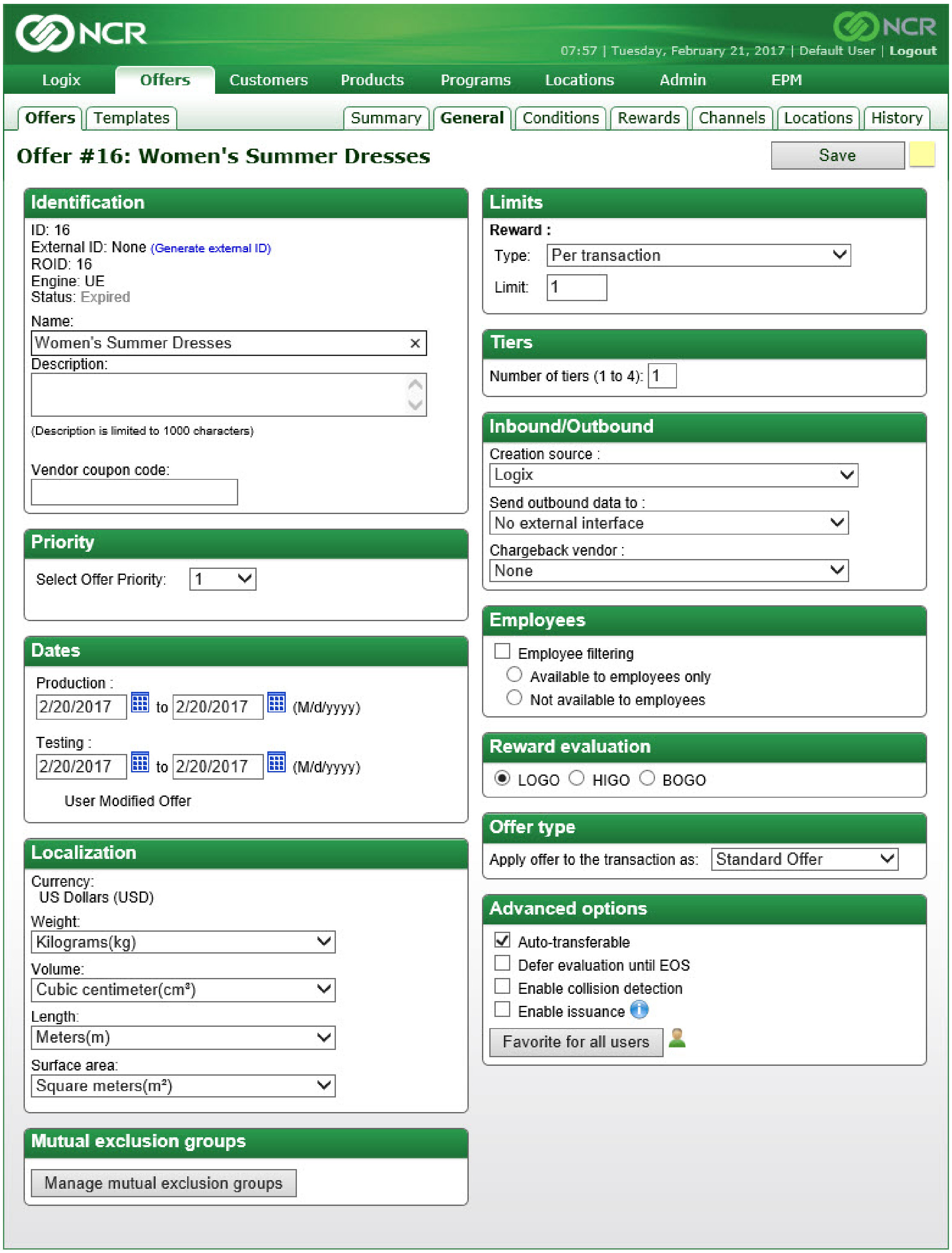
- **Folders**—the folder in which the offer is saved.

Note: Defining a folder for offers is optional.

3. Select **Save**. The application displays the Offer Configuration sub–page.



If the multi unit of measure setting is enabled and Units of Measure (UOM) sets are configured in the system, the Localization pane in the Offer Configuration sub–page displays the units of measure.

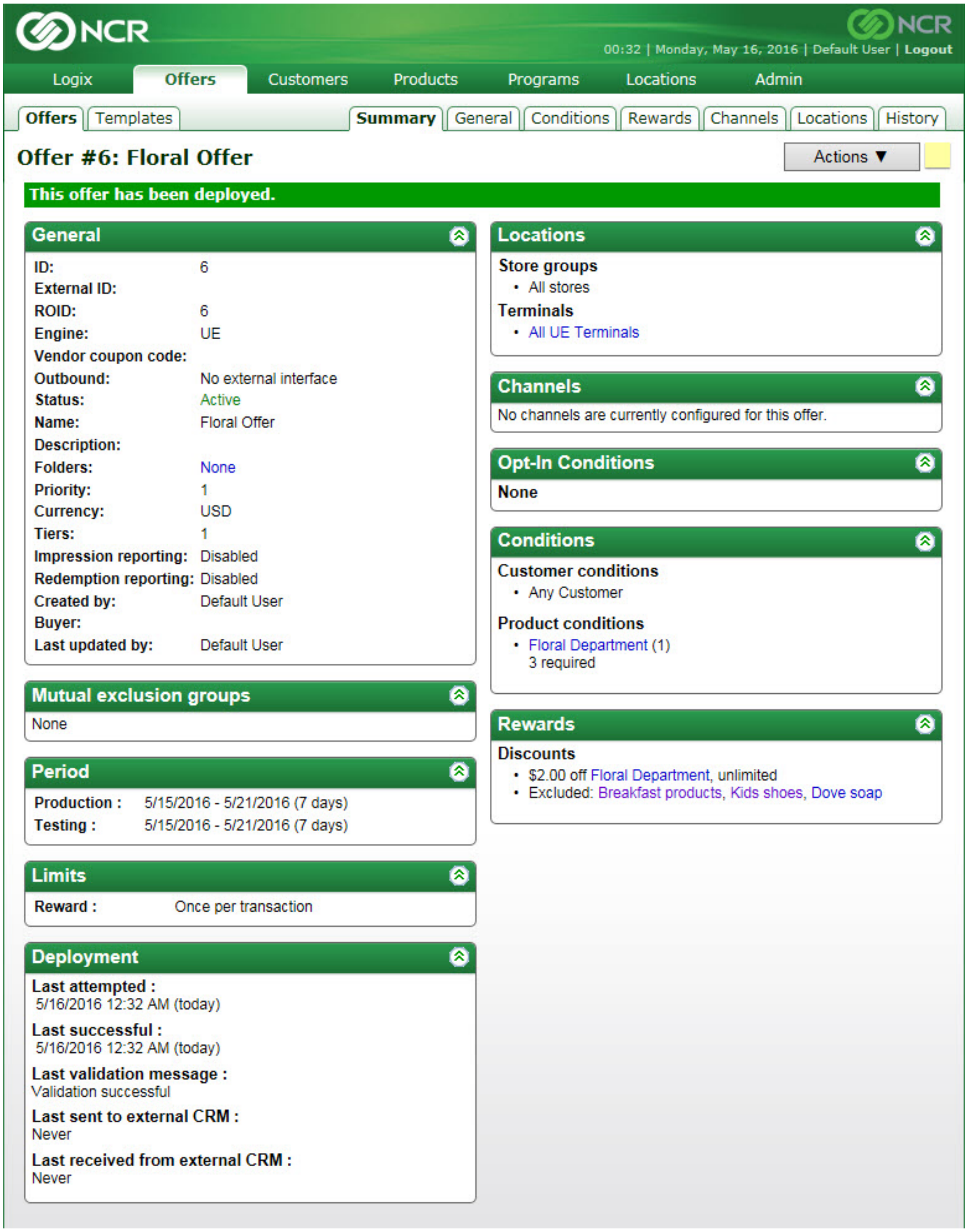


4. From the Offer Configuration sub–page, define the characteristics of the new offer. For more information, refer to *Defining Offer Parameters* on page 146.

Copying Offers

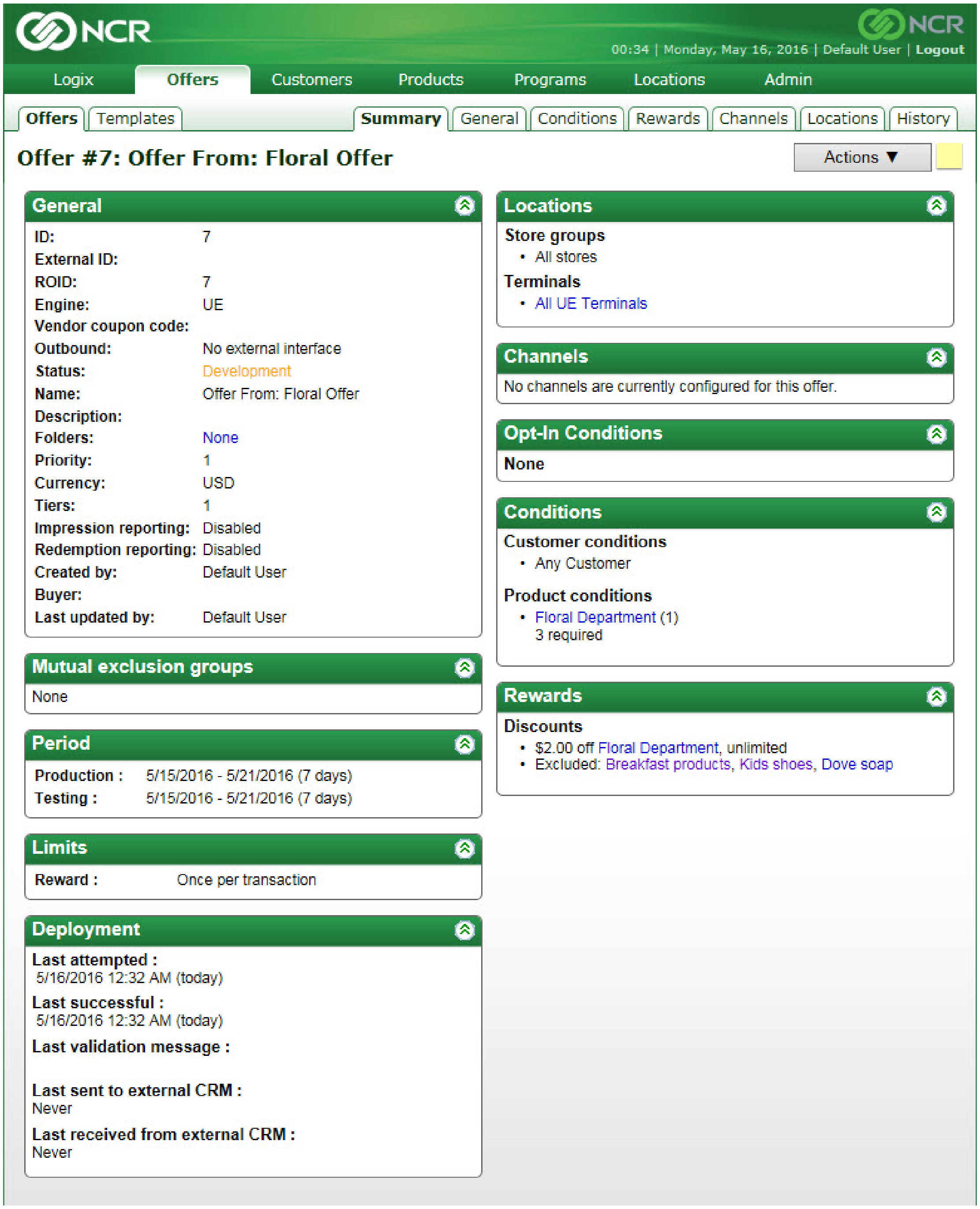
To create an offer using an existing offer, follow these steps:

1. From the Offers page, select an offer. The corresponding Offer Summary sub–page is displayed.



Note: To view all activities related to the offer, select the **History** sub–page tab. For more information, refer to *Tracking Offer Changes* on page 185.

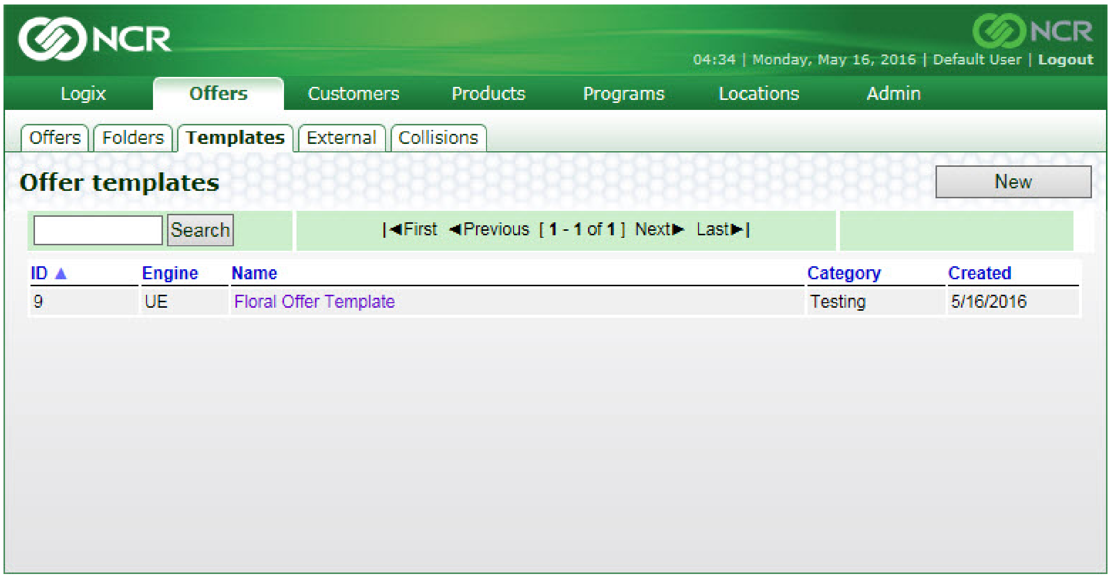
2. From the Actions menu, select **Copy offer**. The Summary sub–page displays a copy of the offer indicated by an "Offer From:" text in the title of the new offer.



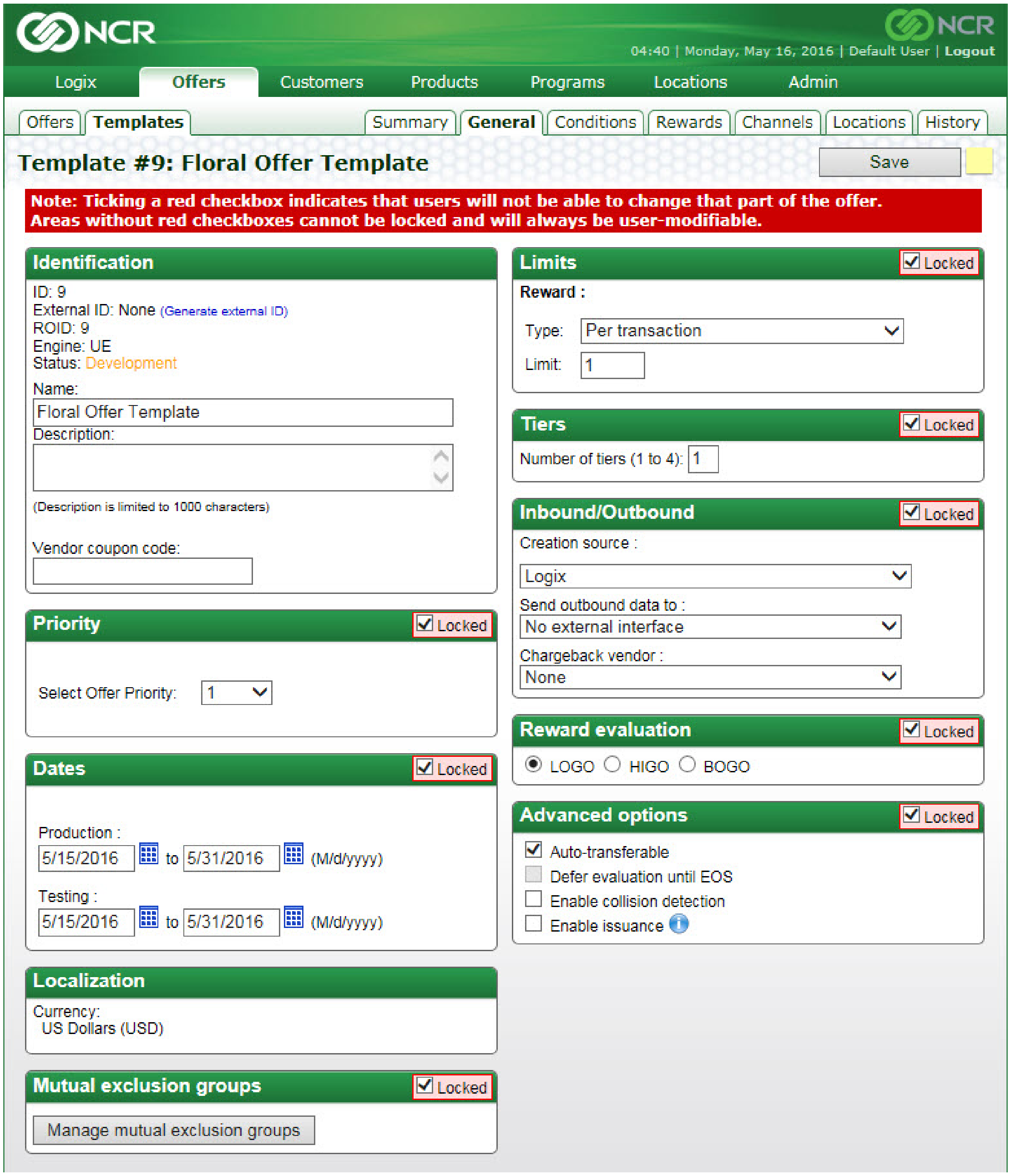
Using Offer Templates

Offers can also be created using templates that have preset data. Using templates saves time and ensures consistency when creating a large number of offers with very similar characteristics. To create offers using templates, follow these steps:

1. From the Offers main tab, select the **Templates** page tab. The application displays the Templates page.



2. Select a template name. The corresponding Template Configuration sub–page is displayed as shown in the following example:

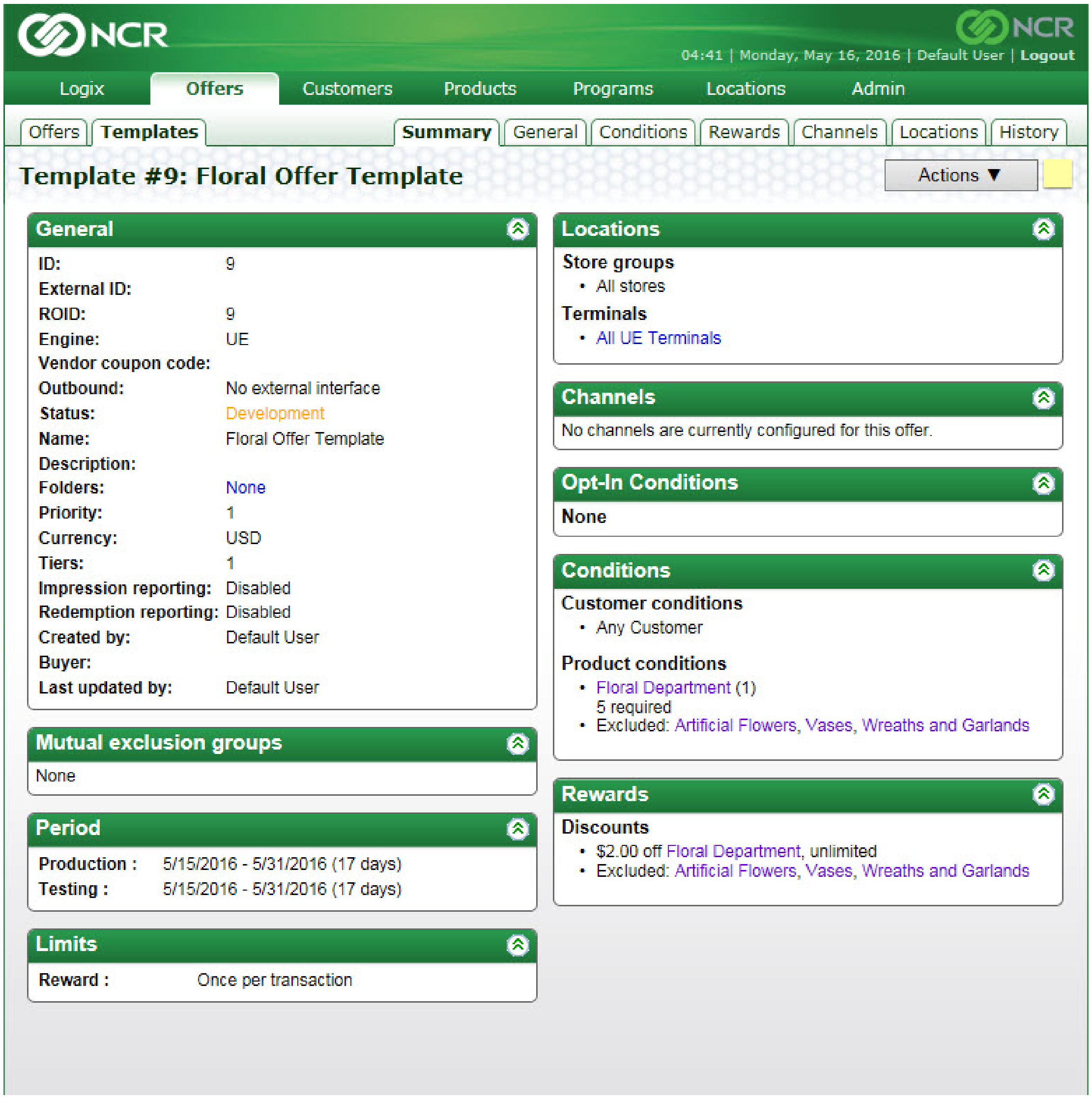


Note: To set the default state of the Locked check box, refer to *Offer Options* on page 720.

3. Modify the configuration parameters and then, select **Save**.

Note: Selecting a **Locked** check box prevents users from updating the corresponding Offer parameter when an offer is created from this template.

4. Select the **Summary** sub–tab. The Template Summary sub–page is displayed.



5. From the Actions menu, select **New offer from template**. A pop–up window is displayed.

6. Enter the number of offers to create.

7. Select **OK**. The Offers page displays the offer template configuration.

Note: If multiple copies are created from the template, the Offers page is displayed.

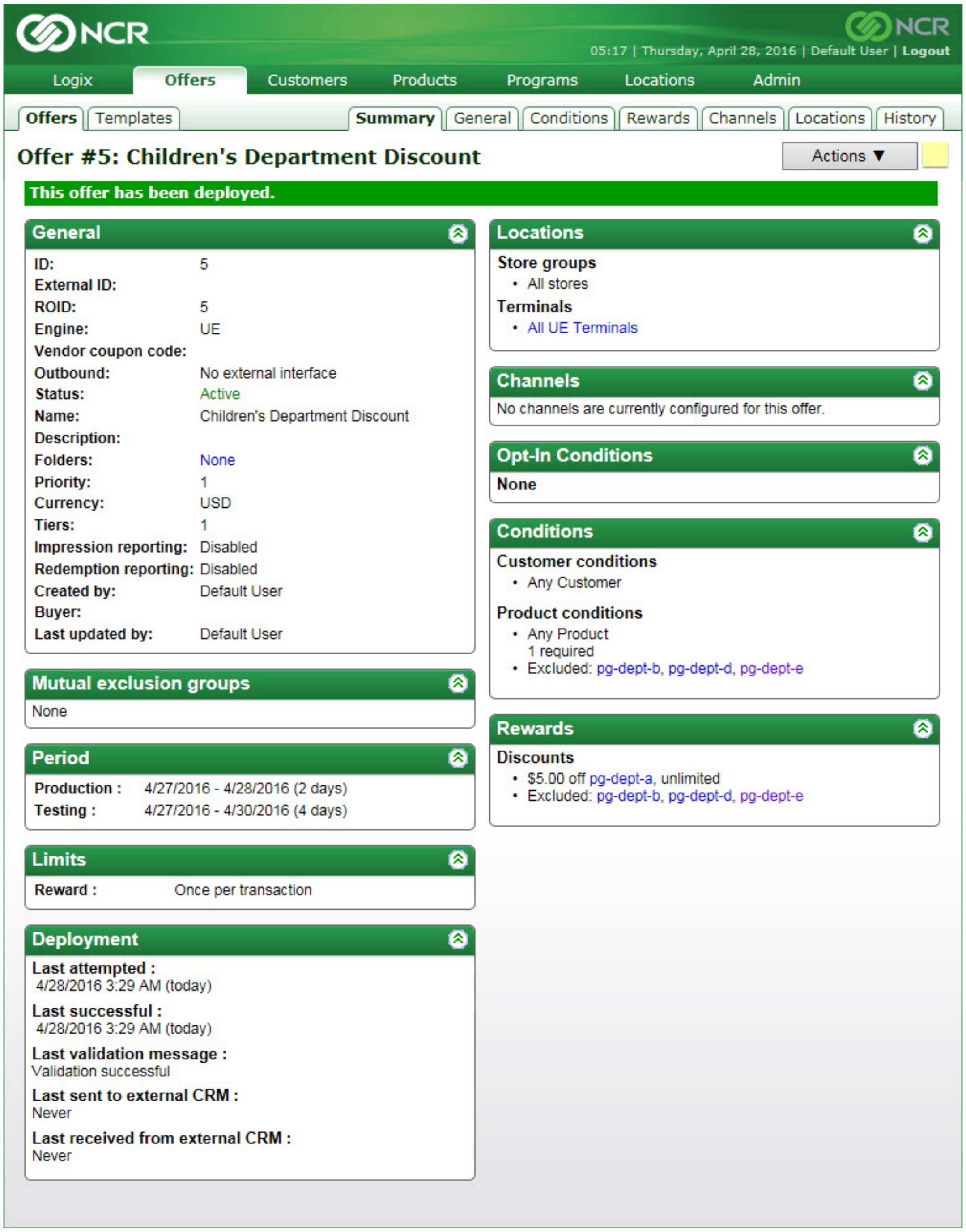
8. Do any of the following:

   - Modify the Offer configuration when necessary and then, select **Save**. For more information, refer to *Defining Offer Parameters* on page 146.
   - Deploy the Offer. For more information, refer to *Deploying Offers* on page 177.

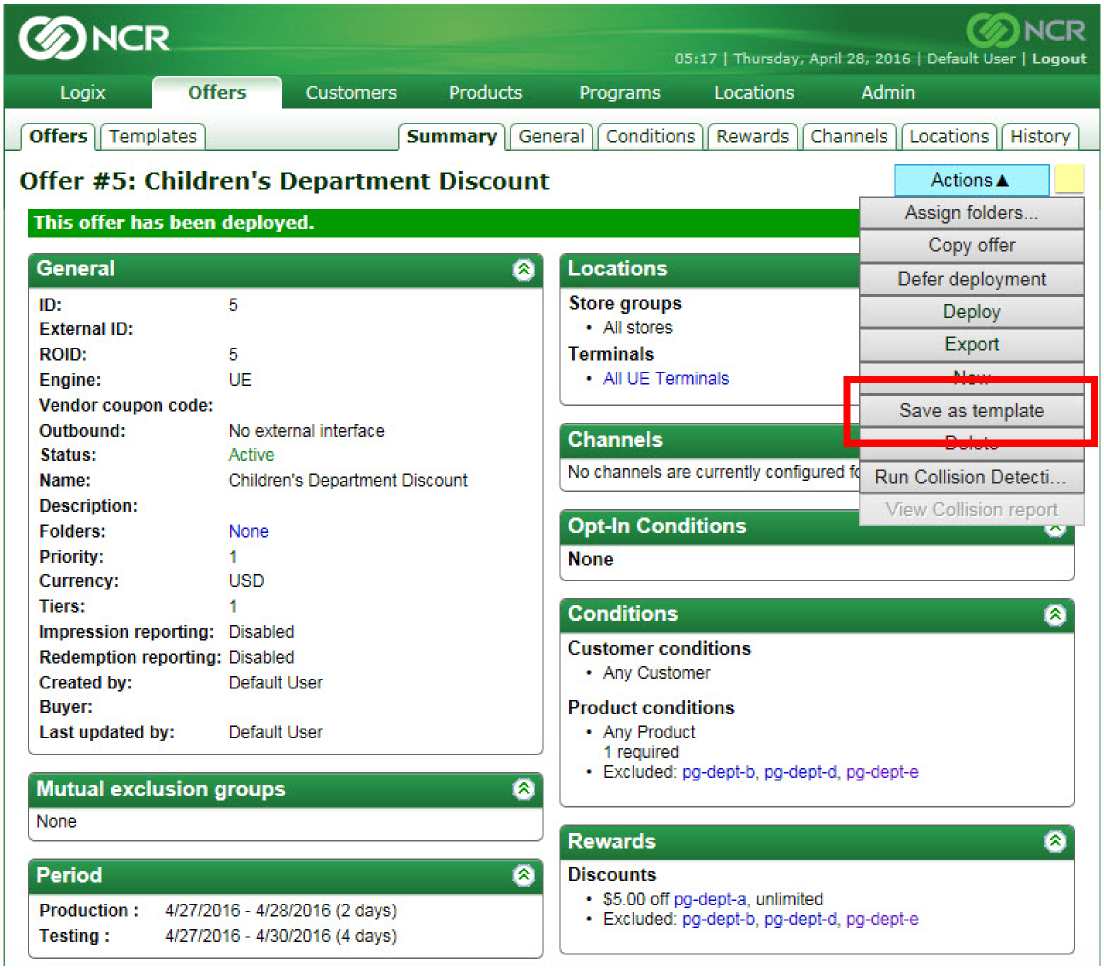
Creating Offer Templates from Offers

To create an offer template using an offer, follow these steps:

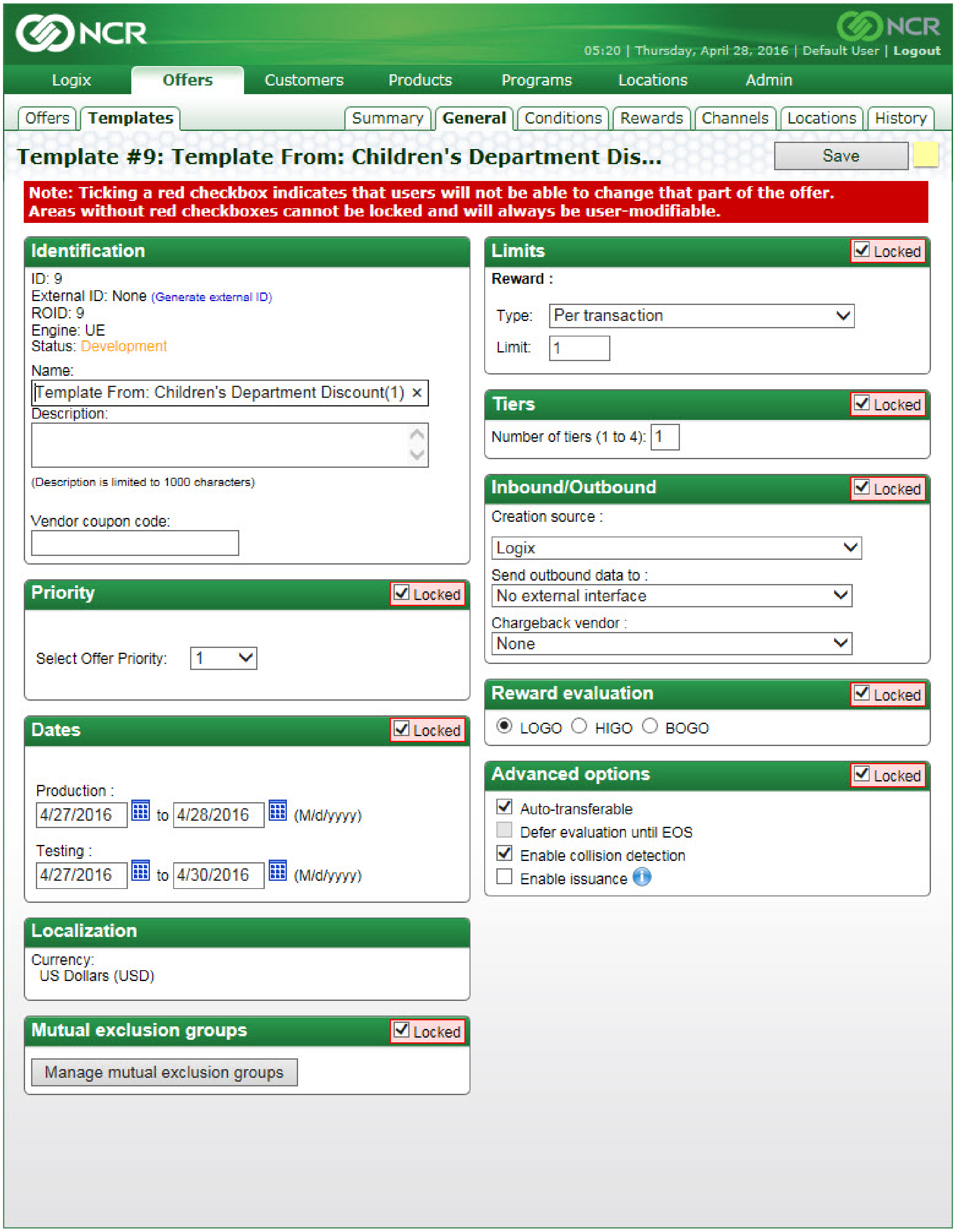
1. From the Offers page, select an offer. The corresponding Offer Summary sub–page is displayed.



2. From the Actions menu, select **Save as template**.



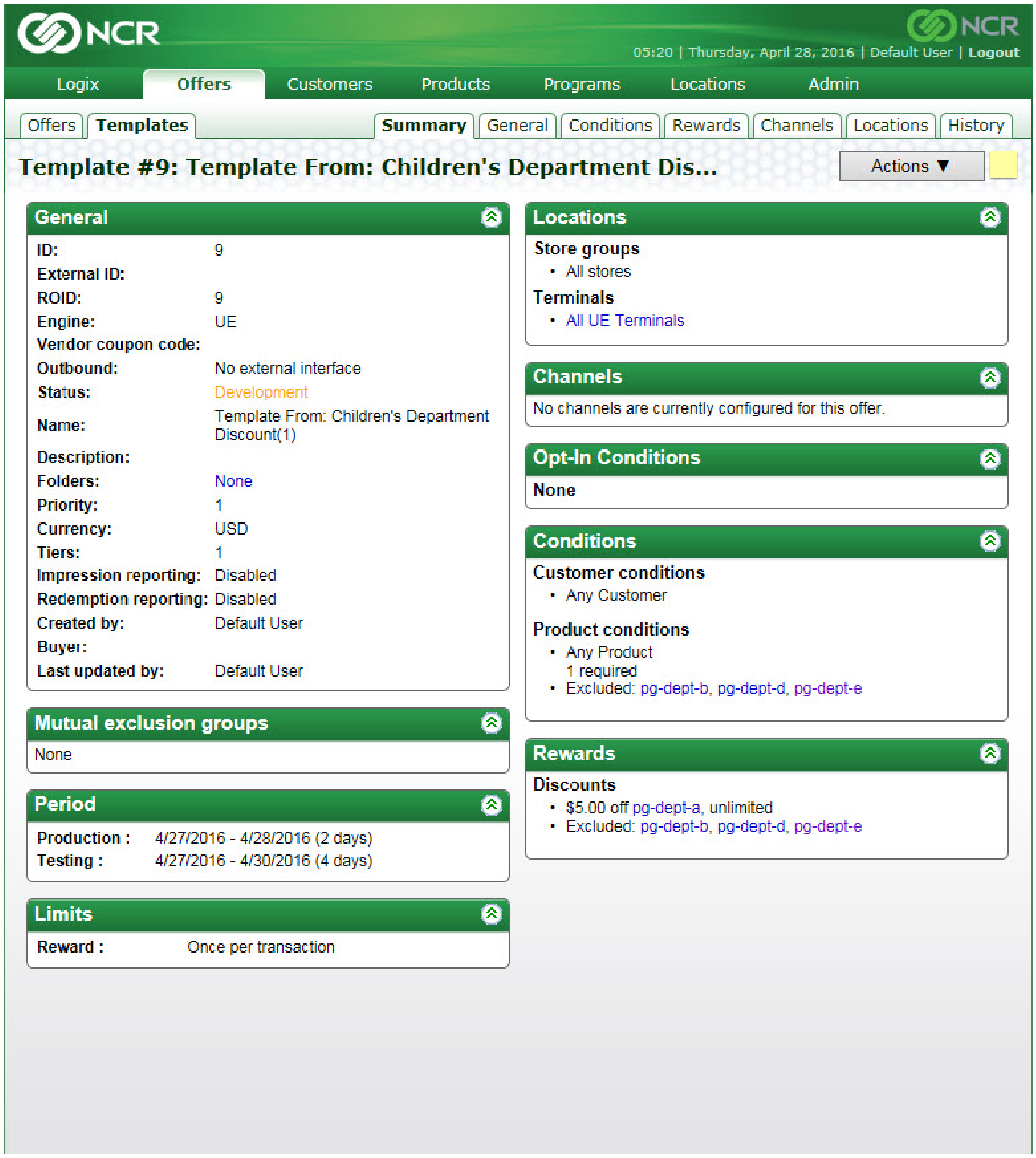
The Template General sub–page displays the newly created template.



3. Modify the configuration parameters and then, select **Save**.

Note: Selecting a **Locked** check box prevents users from updating the corresponding Offer parameter when an offer is created from this template.

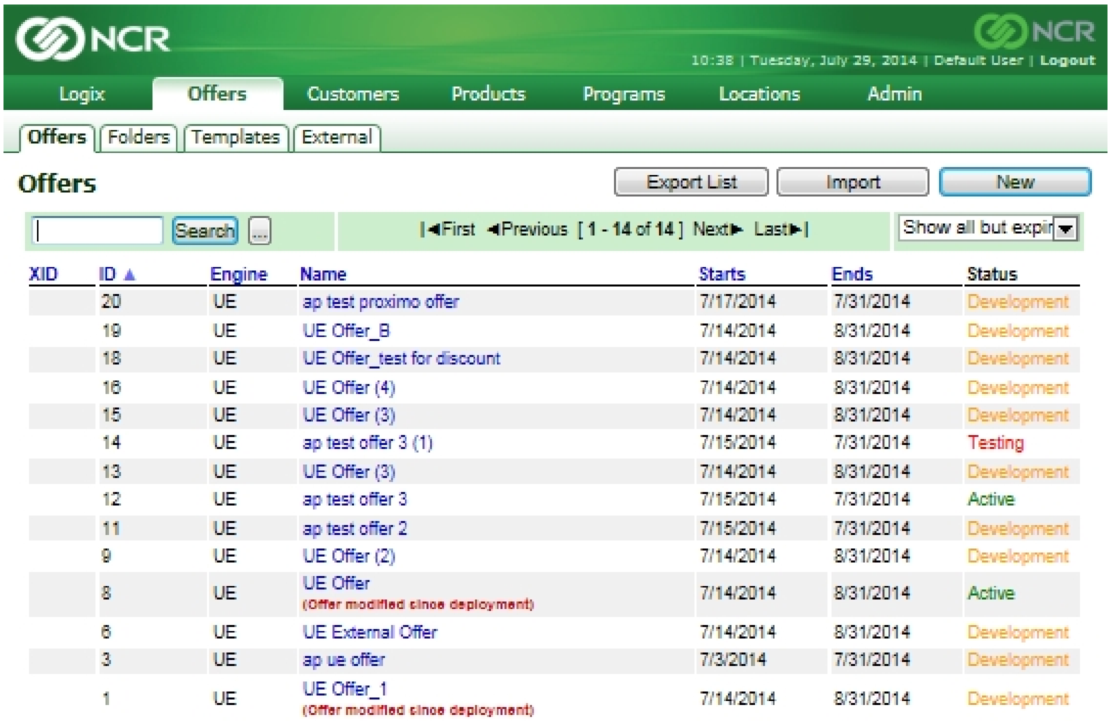
4. Select the **Summary** sub–tab. The Template Summary sub–page is displayed.



Importing Offer Files from Offers Page

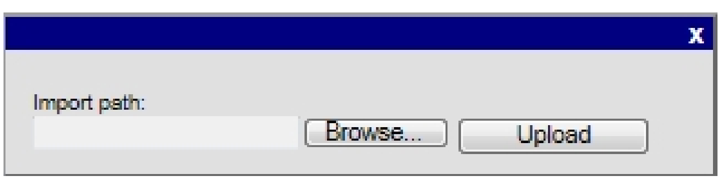
Logix can import offer files from other Logix systems to the current system using the Import function. These files are in XML format. To create an offer by importing Offer files, follow these steps:

1. From the Offers tab, select the **Offers** page tab. The application displays the Offers page.



Note: To import offer files from the External Offers page, refer to *Importing Offer Files from External Offers Page* on page 106.

2. Select **Import**. A pop–up window is displayed.



3. Select **Browse**. A file directory window is displayed.
4. Select the offer file to import.

5. Select **Upload**. The offers page displays the imported offer configuration.

Note: If the advanced option specified in the Offer Import file enables collision detection and is different from the default UE System Option of the target system, the value specified in the imported file overrides the system option only for the imported offer.

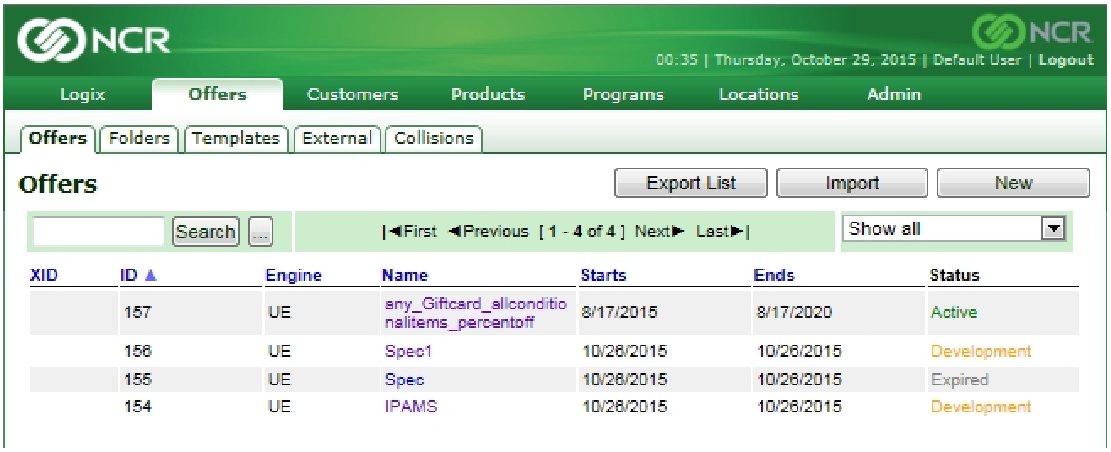
6. Do any of the following:
   - Modify the Offer configuration when necessary and then, select **Save**. For more information, refer to *Defining Offer Parameters* on page 146.
   - Deploy the Offer. For more information, refer to *Deploying Offers* on page 177.

Exporting Offer Files from Offers Page

Logix can export an Offer file to the local computer in `.GZ` file format. To export an Offer file, follow these steps:

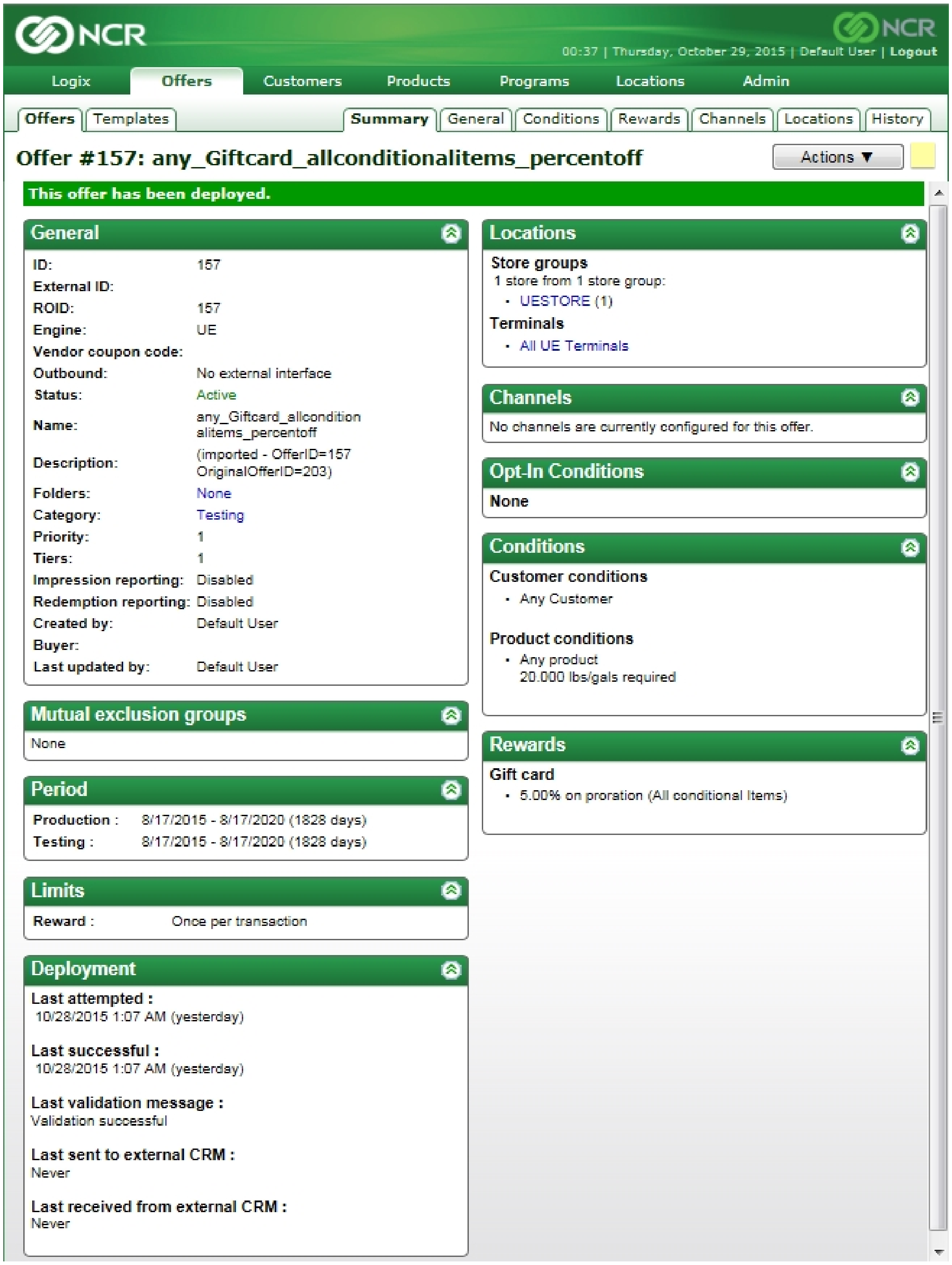
Note: Logix permits users to export only one Offer file at a time.

1. Select the **Offers** main tab. The Offers page is displayed by default.



Note: To specify the Offers to display in the Offers page, select an option from the Filter drop–down list.

2. Select an offer. The corresponding Offer Summary page is displayed.



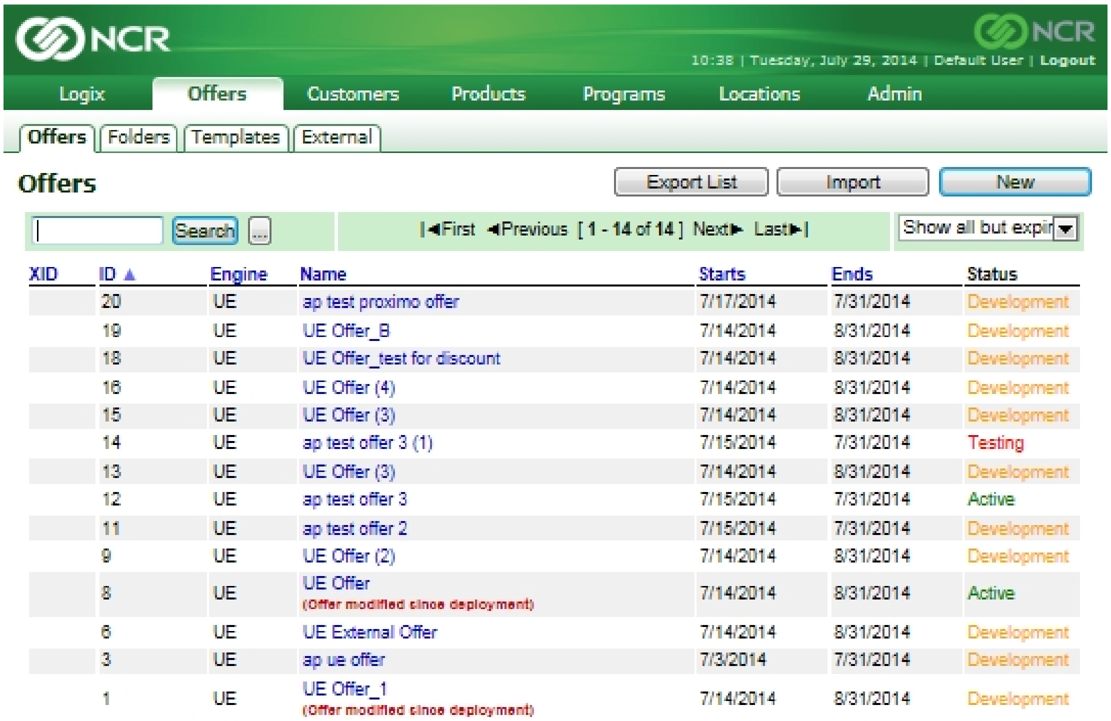
3. From the Actions menu, select **Export** and then, save the file. The Offer file is downloaded as a `.GZ` file.

To import offer files from the Offers page, refer to *Importing Offer Files from Offers Page* on page 167.

Exporting Offers List from Offers Page

Logix can export the list of offers to the local computer in `.xls` format. To export the offers list, follow these steps:

1. From the Offers tab, select the **Offers** page tab. The application displays the Offers page.



Note: To specify the Offers to display in the Offers page, select an option from the Filter drop–down list.

2. Select the **Export List** button and then, save the file. An Excel file with the list of offers is downloaded.

To export the offers list from the External Offers page, refer to *Exporting Offers List from External Offers Page* on page 109.

Performing Collision Detection

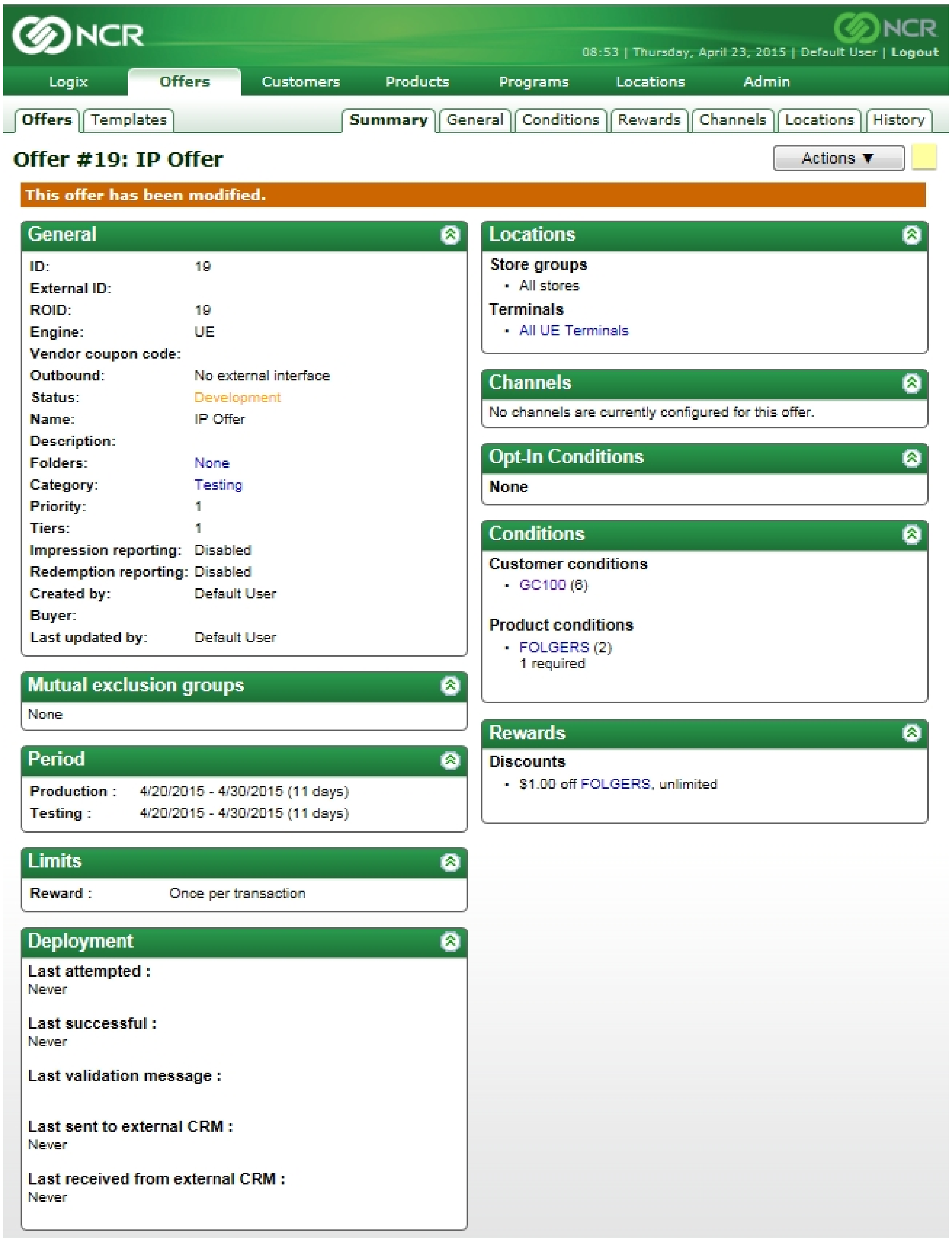
Logix permits users to determine if an offer has product collisions with other offers using any of the following procedures:

- Interactive Product Collision detection. For more information, refer to *Performing Interactive Collision Detection* on the facing page.
- Silent Product Collision detection. For more information, refer to *Performing Silent Collision Detection* on page 175.

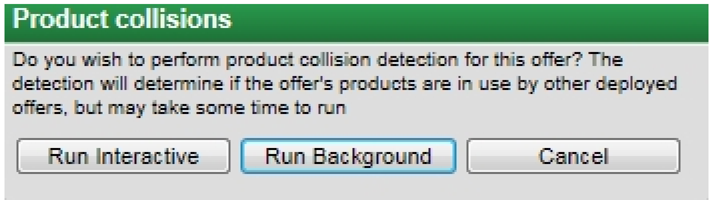
Performing Interactive Collision Detection

Logix allows users to determine colliding offers from the Offer Summary sub–page. To interactively resolve product collisions, follow these steps:

1. From the Offers page, select an offer. The Offer Summary sub–page is displayed.



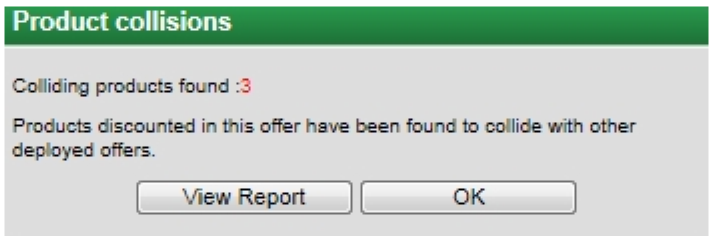
2. From the Actions menu, select **Run Collision Detection**. A pop–up window is displayed.



Note: Select **Cancel** to cancel the Product Collision Detection process.

3. Select **Run Interactive**. The collision detection process starts. While the process is ongoing, you cannot perform any action until the process is complete.

   If collision is found, a pop–up window with the following information is displayed.



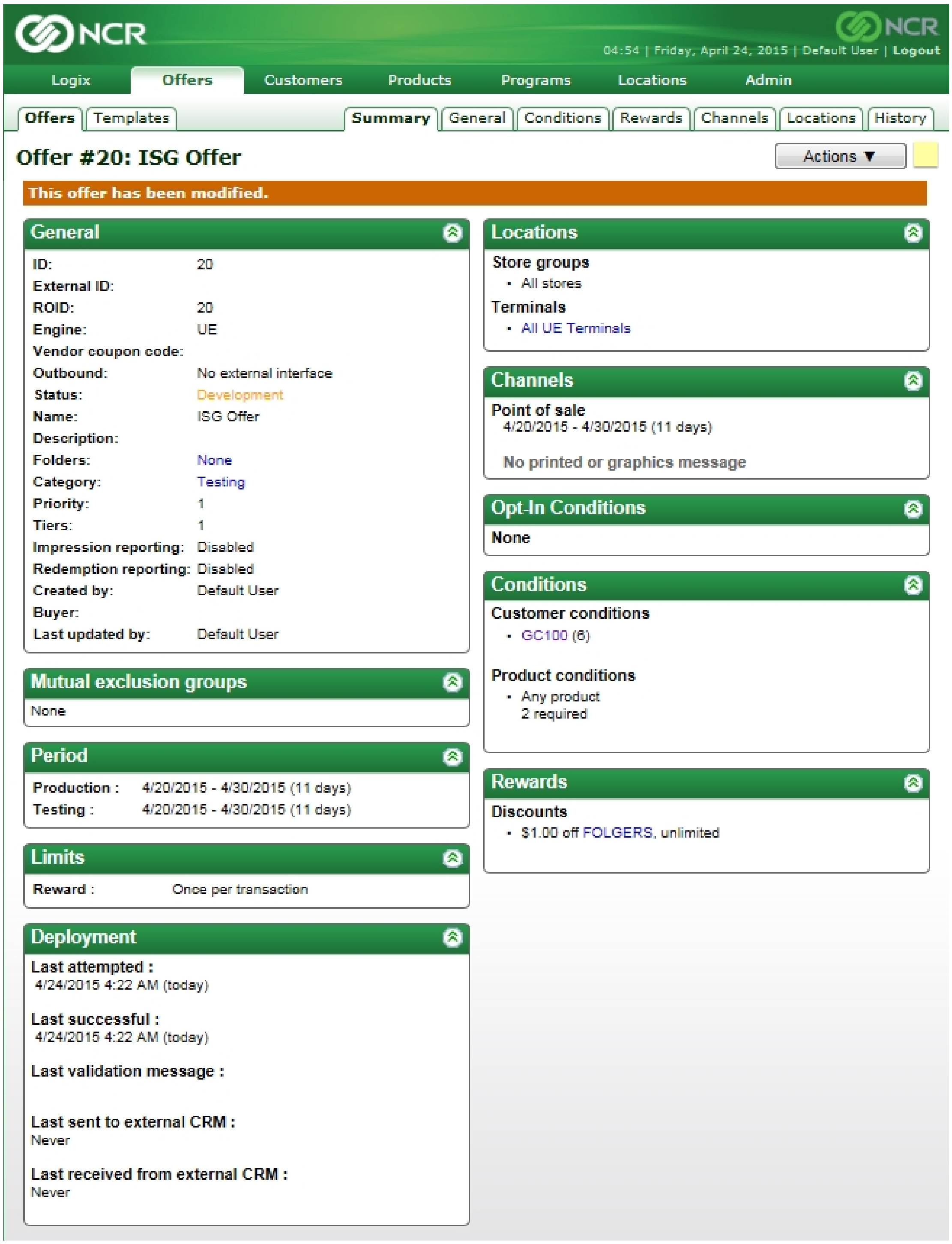
Note: If no collision is found, the pop–up window displays *No collision detected*.

4. Do any of the following:
   - Select **View Report**. The Collision Report Details page is displayed. For more information, refer to *Accessing Collision Reports* on page 116.
   - Select **OK** to close the window.

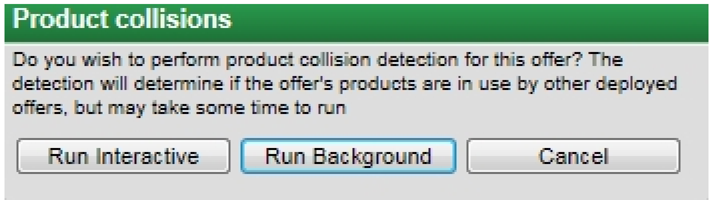
Performing Silent Collision Detection

Logix permits users to determine colliding offers from the Offer Summary sub–page. To resolve product collisions in the background, follow these steps:

1. From the Offers page, select an offer. The Offer Summary sub–page is displayed.



2. From the Actions menu, select **Run Collision Detection**. A pop–up window is displayed.



Note: Select **Cancel** to cancel the Product Collision Detection process.

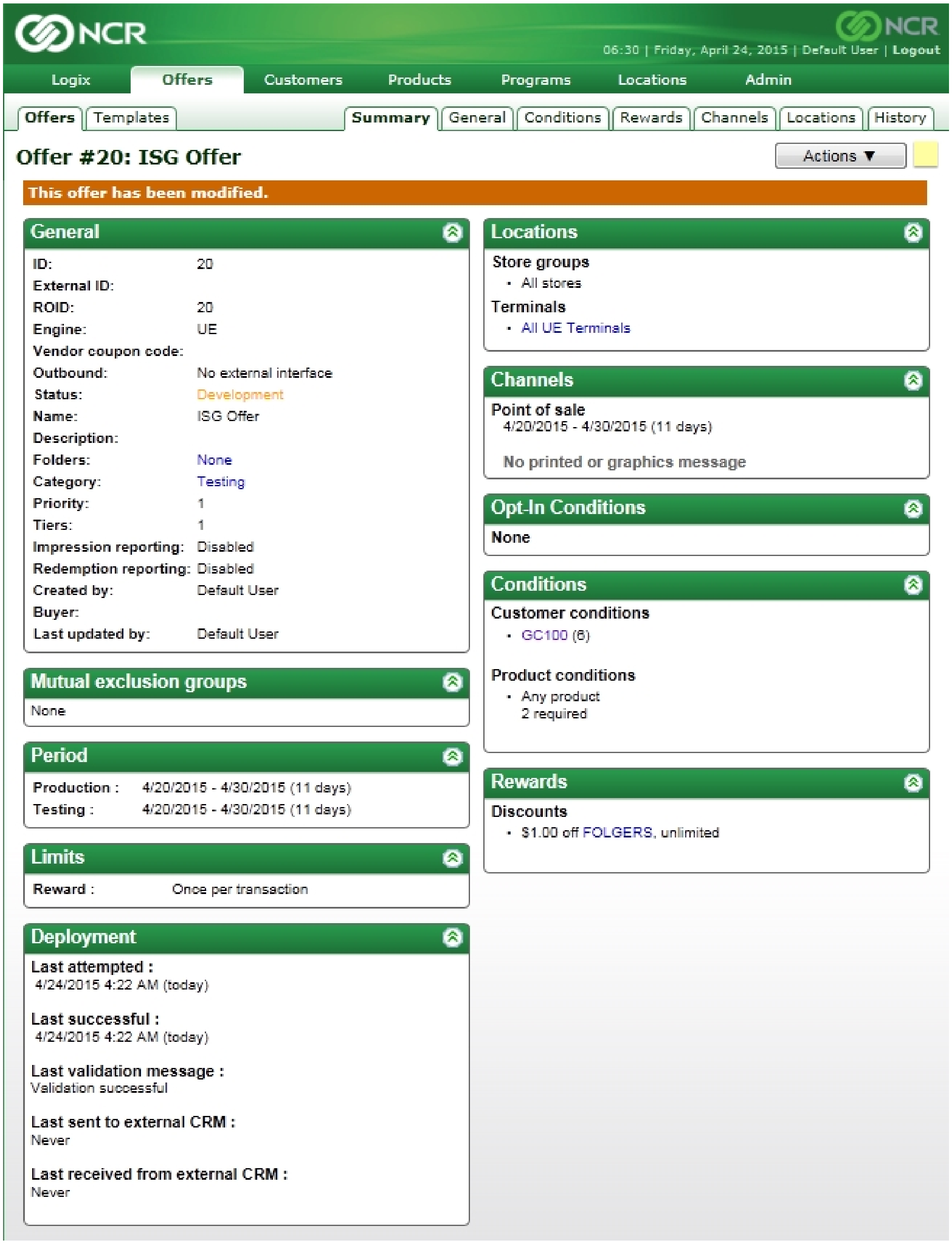
3. Select **Run Background**. The collision detection process runs in the background, and user can perform other actions on the Logix UI. The offer is locked and the Cancel collision detection button is displayed on the upper right side of the Offer Summary sub–page.

Note: When a collision is detected, the offer is not deployed and Logix generates an offer collision report in the Collision Reports page or sends a Collision Report to the configured email address of the user. For more information, refer to *Setting Email Alerts* on page 582.

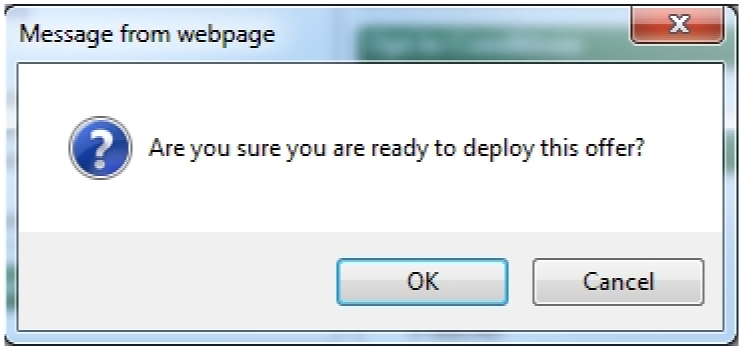
Deploying Offers

To deploy an offer, follow these steps:

1. From the Offers page, select an offer. The Offer Summary sub–page is displayed.



2. From the Actions menu, select **Deploy**. A confirmation window is displayed.



3. Select **OK**. The summary sub–page indicates that the offer is deployed.

Note: To successfully deploy an offer, select at least one terminal and define all tiers with valid values. For more information, refer to *Defining Offer Parameters* on page 146.

Deploying Colliding Offers

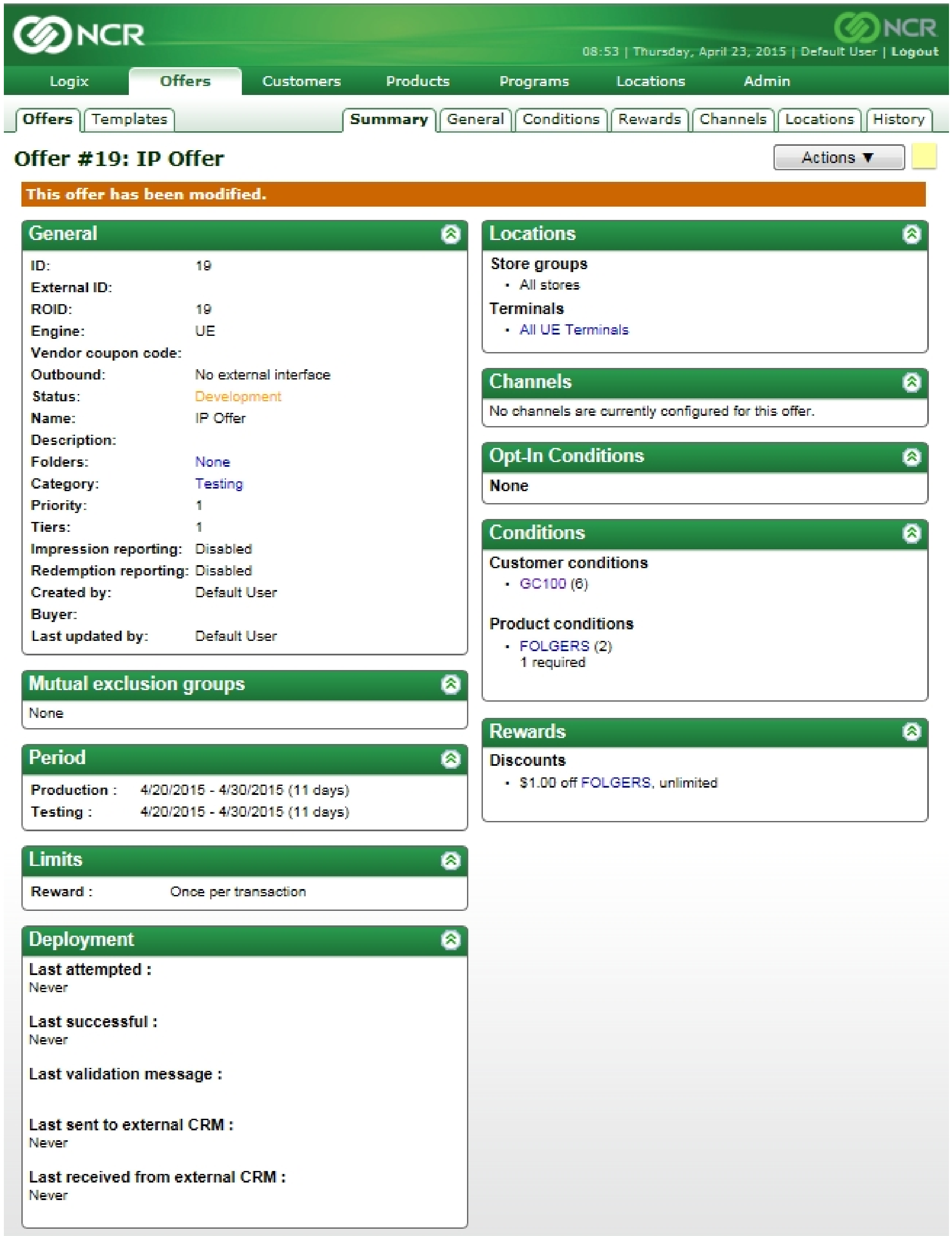
Logix allows users to determine colliding offers before deploying them. This section provides instructions on how to resolve product collisions before deploying offers:

- Interactive Product Collision detection. For more information, refer to *Performing Interactive Collision Detection When Deploying Offers* on the next page.
- Silent Product Collision detection. For more information, refer to *Performing Silent Collision Detection When Deploying Offers* on page 182.

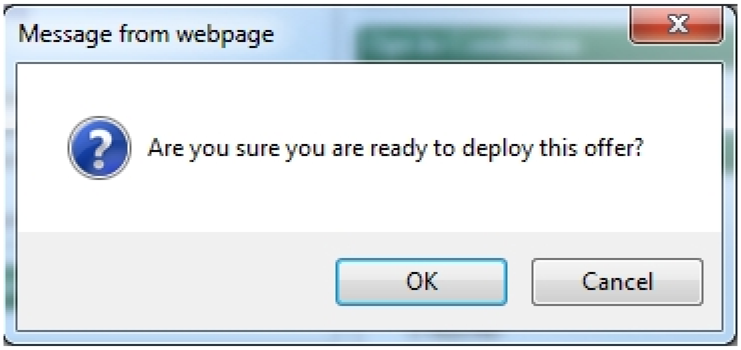
Performing Interactive Collision Detection When Deploying Offers

Logix allows users to determine colliding offers before deploying them. To interactively resolve product collisions, follow these steps:

1. From the Offers page, select an offer. The Offer Summary sub–page is displayed.

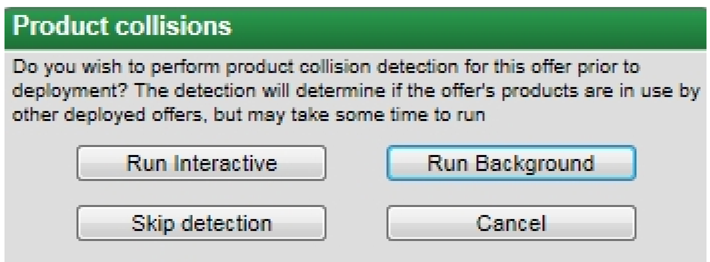


2. From the Actions menu, select **Deploy**. A pop–up window is displayed.



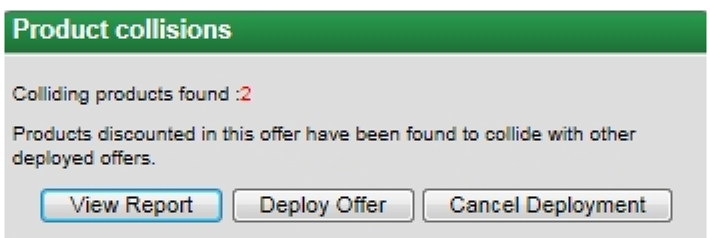
Note: Select **Cancel** to cancel the deployment.

3. Select **OK**. The Product collisions pop–up window is displayed.



Note: Selecting **Skip detection** automatically deploys the offer.

4. Select **Run Interactive**. A pop–up window is displayed.

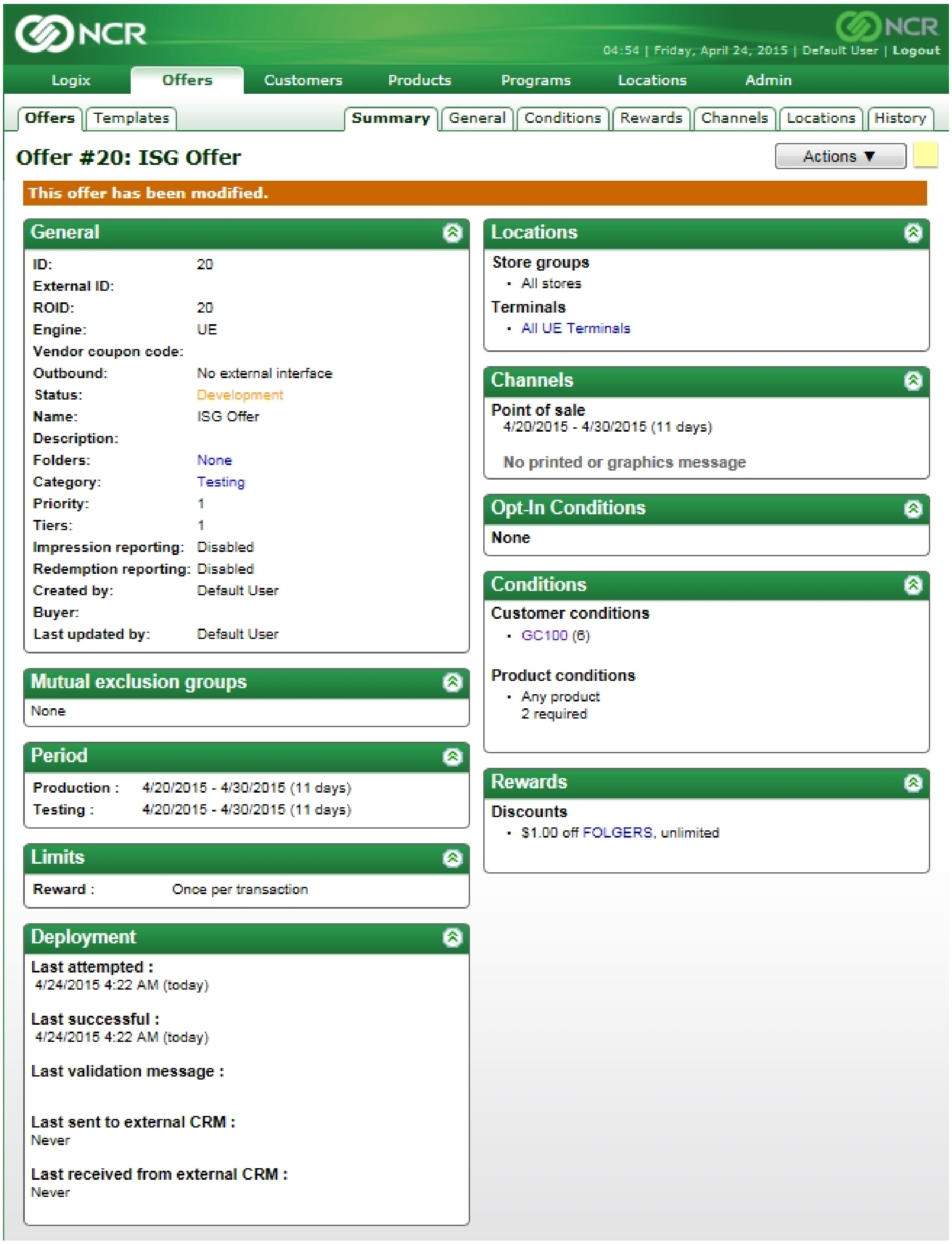


5. Do any of the following:
   - Select **View Report**. The Collision Report Details page is displayed. For more information, refer to *Accessing Collision Reports* on page 116.
   - Select **Deploy Offer**. For more information, refer to *Deploying Offers* on page 177.
   - Select **Cancel Deployment**.

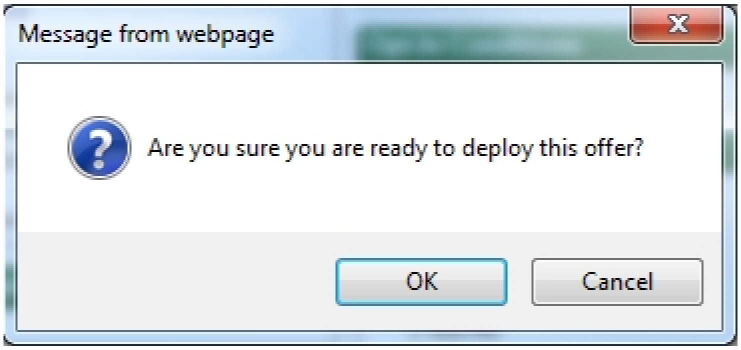
Performing Silent Collision Detection When Deploying Offers

Logix allows users to determine colliding offers before deploying them. To resolve product collisions in the background, follow these steps:

1. From the Offers page, select an offer. The Offer Summary sub–page is displayed.

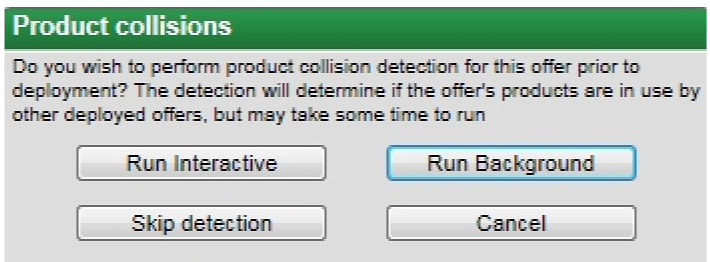


2. From the Actions menu, select **Deploy**. A pop–up window is displayed.



Note: Select **Cancel** to cancel the deployment.

3. Select **OK**. The Product collisions pop–up window is displayed.



Note: Selecting **Skip detection** automatically deploys the offer.

4. Select **Run Background**. The offer is locked and the Cancel collision detection button is displayed on the upper right side of the Offer Summary sub–page.

Note: When a collision is detected, the offer is not deployed and Logix generates an offer collision report in the Collision Reports page or sends a Collision Report to the configured email address of the user. For more information, refer to *Setting Email Alerts* on page 582.

Deleting Offers

To delete offers, follow these steps:

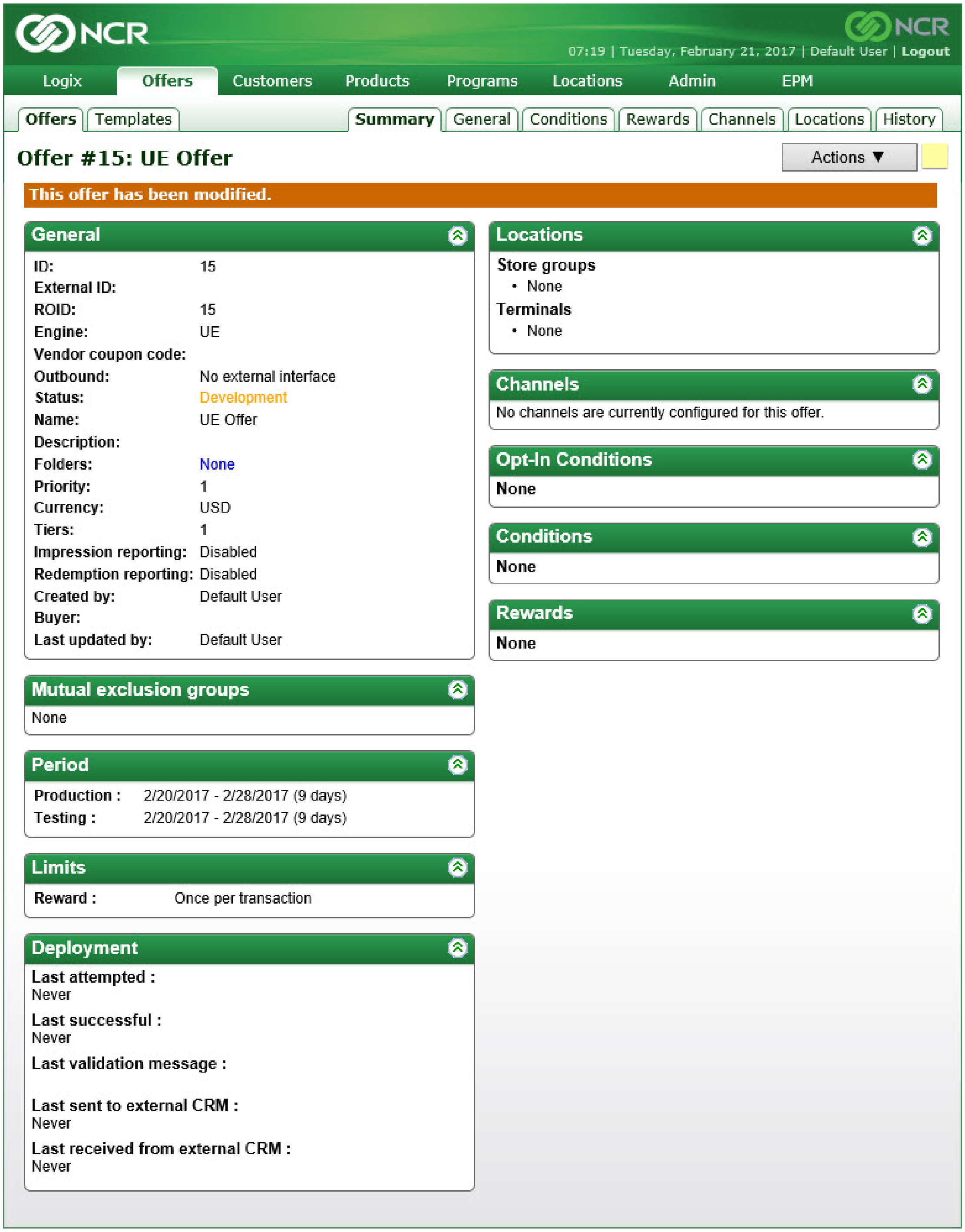
1. From the Offers page, select an offer. The Offer Summary sub–page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**. The Offer is deleted from the Offers page.

Note: Expired or deleted offers in Logix are removed from the database after ten days by the DB Purge Agent. For more information, refer to *DB Purge Agent* on page 791. To modify the purging period, contact an NCR Professional Services Consultant.

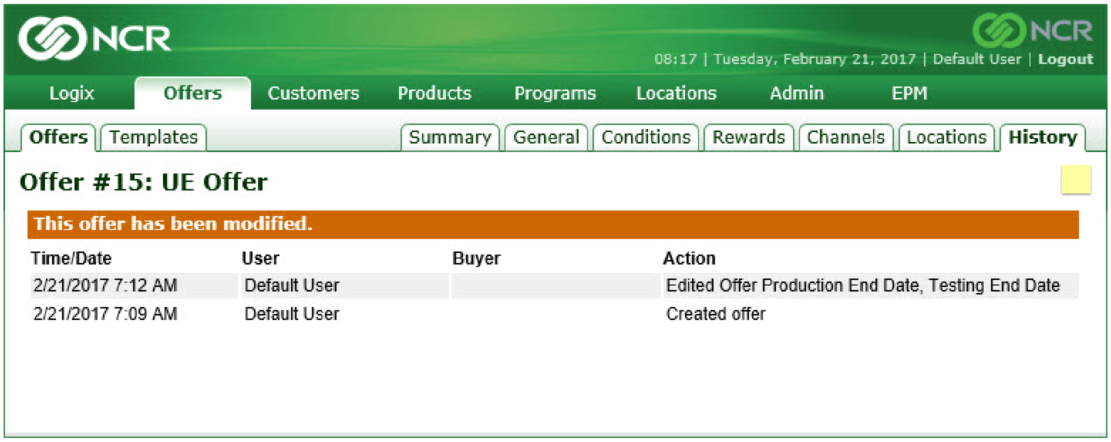
Tracking Offer Changes

To view the history details of an offer, follow these steps:

1. From the Offers page, select an offer. The Offer Summary page is displayed.



2. Select the **History** sub–page tab. The application displays the changes made to the offer.



Note: Select the **Notes** icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Creating Offers with configured UOM sets

Logix is configured to work with Units of Measure (UOM) to create conditions and reward transactions that purchase items with specific units of measure. The following are the UOMs supported in the UE promotion engine and some of their examples:

Units of Measure	Examples
Weight	Grams, Ounces, Pounds, Kilograms, Tons
Volume	Yards, Meters
Surface Area	Square yards, Square meters
Length	Cubic meter, Gallon, Liter, Pint, Quart

Offers that are created with configured UOM sets reward transactions based on the condition that has the value of any of the selected units of measure.

Example: An offer rewards a discount of 10% when the customer purchases 10 kilos of rice in a single transaction from the store.

To create an offer with configured UOM sets, follow these steps:

1. Enable the *Enable multi unit of measure for UE* setting in the Logix UI. For more information, refer to *Configuring the UOM setting* on the next page.
2. Configure the units of measure in the Configuration page by setting the default type for the UOMs and the corresponding precision levels for all types. For more information, refer to *Units of Measure (UOM)* on page 636.
3. Create a UOM set. For more information, refer to *Creating UOM Sets* on page 551.
4. Associate stores with the UOM set. For more information, refer to *Associating Stores with UOM Sets* on page 519.
5. Create an offer and specify the UOM types to use for the weight, volume, length, and surface area. For more information, refer to *Creating New Offers* on page 154.
6. Create a product condition and select a UOM as the value of the condition. For more information on setting a product condition for an offer, refer to *Setting Product Conditions* on page 220. For information on setting a UOM for the value of the condition, refer to *Value: Unit of Measure* on page 235.

Note: After deploying an offer that is configured with a UOM set and then the *Enable multi unit of measure for UE* setting is disabled in the settings, the selected units of measure for the offer should still display in the Offers General page. When new offers are created, the option to set the units of measure for the offer should not display.

Configuring the UOM setting

By default, the *Enable multi unit of measure for UE* setting is disabled. To enable this setting, follow these steps:

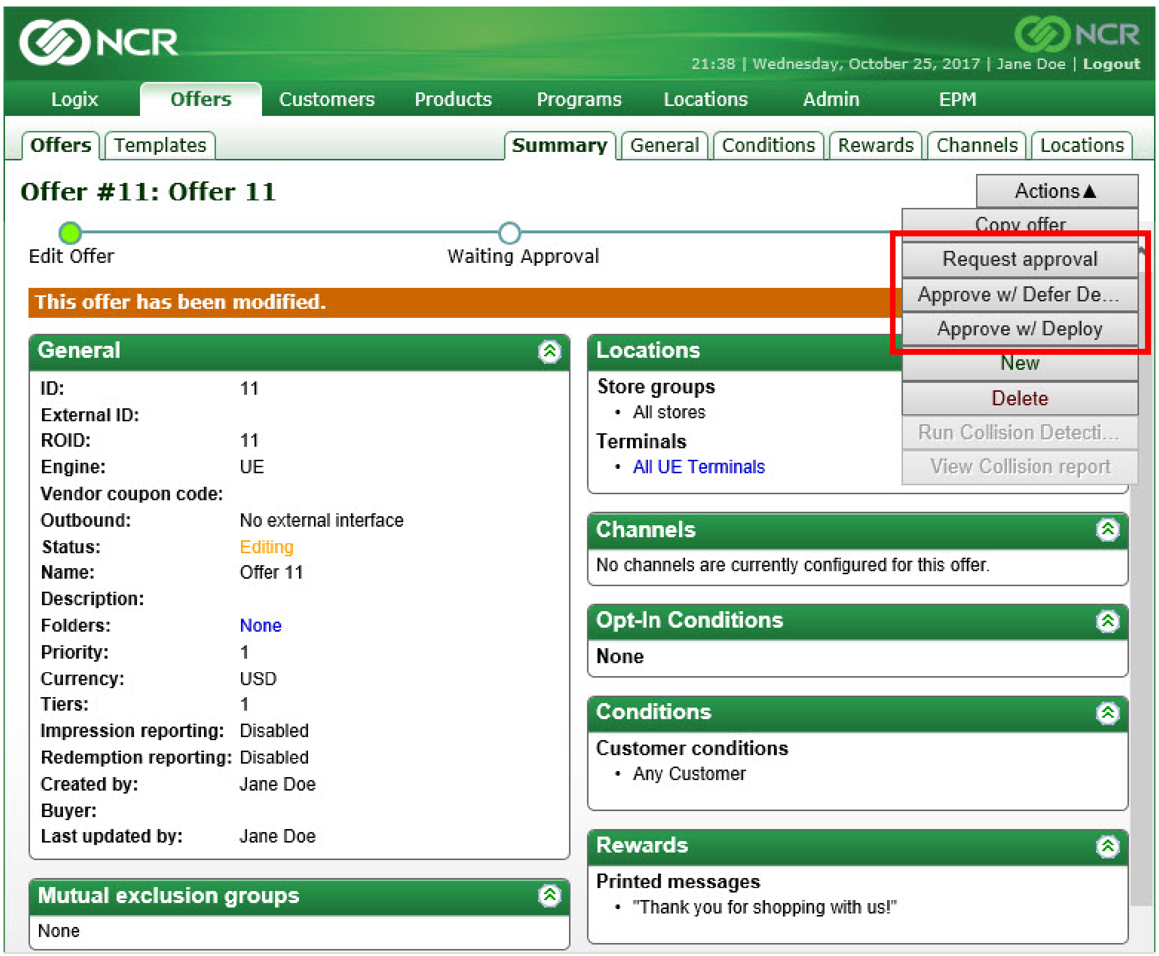
1. From the Logix UI, select **Admin→Configuration→Settings: UE**. The UE settings page is displayed.
2. Go to the **Localization** pane.

3. Set the *Enable multi unit of measure for UE* setting to **Yes**.
4. Select **Save**.

Creating Offers with Offer Approval Workflow

If the offer approval workflow is enabled and a user who needs offer approval has created an offer, the user sees the following approval options instead of deploy options in the Actions drop-down list:

- Request approval—submits the offer for approval, and as soon as it is approved, the offer's status changes to Approved.
- Approve w/ Defer Deployment—submits the offer for approval, and as soon as it is approved, the offer is deferred for deployment.
- Approve w/ Deploy—submits the offer for approval, and as soon as it is approved, the offer is automatically deployed. The offer's status changes to Active.



Note: If Collision Detection is enabled, additional options are displayed in a pop-up window after user selects any of the approval options. For more information, refer to *Performing Collision Detection With Offer Approval Workflow* on page 191.

An offer that is submitted for approval can be approved only by one of the approvers assigned to the user or by an approval manager.

When offers are submitted for approval, the offer status changes from Editing to Pending Approval. Also, the offer remains in the locked state and cannot be modified. The user can only view the offer information.

When an offer is approved or rejected, the offer returns to the unlocked state.

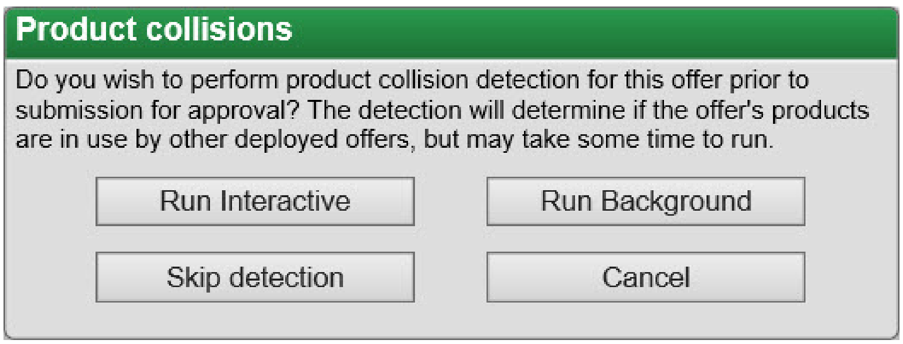
If a user edits an approved offer, the offer status changes from Approved to Editing. User must then submit the edited offer back for approval.

Performing Collision Detection With Offer Approval Workflow

If the Collision Detection feature is enabled, the user can perform collision detection of the offer before it is submitted for approval. To perform collision detection, follow these steps:

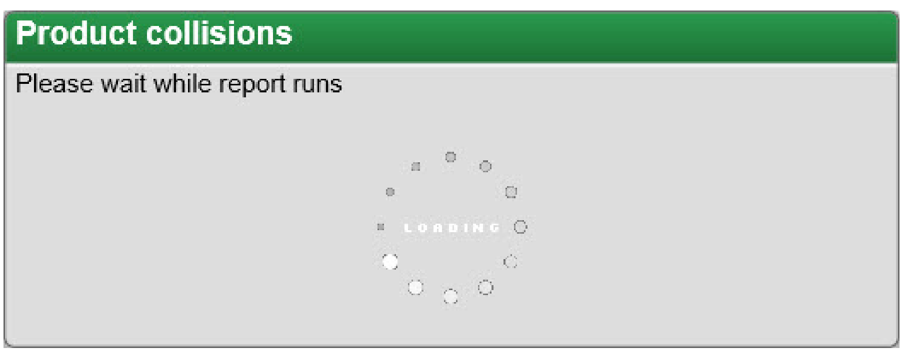
1. From the Offers page, select one of the following offer approval options from the Actions drop-down list:
   - Request approval
   - Approve w/ Defer Deployment
   - Approve w/ Deploy

   The following pop-up window appears:



2. Select **Run Interactive**. The following window appears.

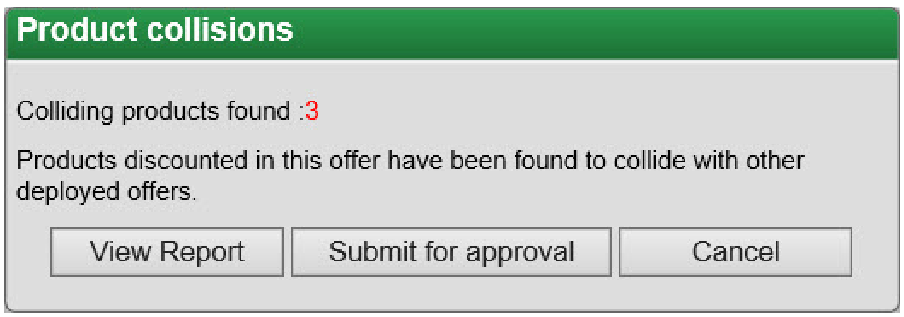
Note: Selecting **Run Background** runs the collision detection in the background.



3. If no collision is detected, the following window appears.

Select **Submit for Approval** to submit the offer for approval based on the approval option that was selected in the Actions drop-down list.

4. If collision is detected, the following window appears.



Do one of the following:

- Select **View Report** to view the Collision Report from the Collisions page.
- Select **Submit for approval** to submit the offer for approval based on the approval option that was selected in the Actions drop-down list.

Offer Conditions

Offer conditions control the availability of offers to customers. This section describes the steps in setting offer conditions. Refer to the following table for a description of offer condition types and their usage frequency.

Note: Certain condition types may be used several times by an offer.

Usage Frequency	Offer Condition Type	Description
Once	Customer Conditions	Used to specify the customer groups that are eligible to receive the offer. For more information, refer to *Setting Customer Conditions* on page 195.
Once	Trackable Coupon Conditions	Used to associate the offer with a trackable coupon program that limits the number of times a particular coupon can be used within the offer. For more information, refer to *Setting Trackable Coupon Conditions* on page 245.
Multiple times	Product Conditions	Used to trigger an offer when certain items are purchased. For more information, refer to *Setting Product Conditions* on page 220.
Multiple times	Points Conditions	Used to trigger an offer when a customer accumulates a certain number of points in a particular program. To set points conditions, ensure that the customer group eligible to receive the offer are cardholders. For more information, refer to *Setting Points Conditions* on page 218.
Multiple times	Stored Value Conditions	Used to trigger an offer when a customer accumulates a certain number of stored value units in a particular program. To set a stored value condition, ensure that customer groups eligible to receive the offer are cardholders. For more information, refer to *Setting Stored Value Conditions* on page 241.

Usage Frequency	Offer Condition Type	Description
Multiple times	Tender Conditions	Used to trigger an offer when a customer pays for items using certain types of tender, such as check, credit card, and so forth; or a certain amount of cash. For more information, refer to *Setting Tender Conditions* on page 243.
Once	Day Conditions	Used to control the days of the week during which an offer is available. For more information, refer to *Setting Day Conditions* on page 205.
Once	Time Conditions	Used to set the time of day during which an offer is active. For more information, refer to *Setting Time Conditions* on page 216. **Example:** A time condition allows an offer to run during morning and evening rush hours but, not in between.
Once	Instant Win Conditions	Used to give customers a chance of being able to redeem an offer. For more information, refer to *Setting Instant Win Conditions* on page 207.
Multiple Times	Trigger Code Conditions	Used to require a particular code, represented by a UPC, to be scanned during a transaction in order to meet the condition. They also inform cashiers if the code is scanned but the other associated conditions are not met; in this case the application displays a message to return the unused coupon to the customer. For more information, refer to *Setting Trigger Code Conditions* on page 247.

Setting Customer Conditions

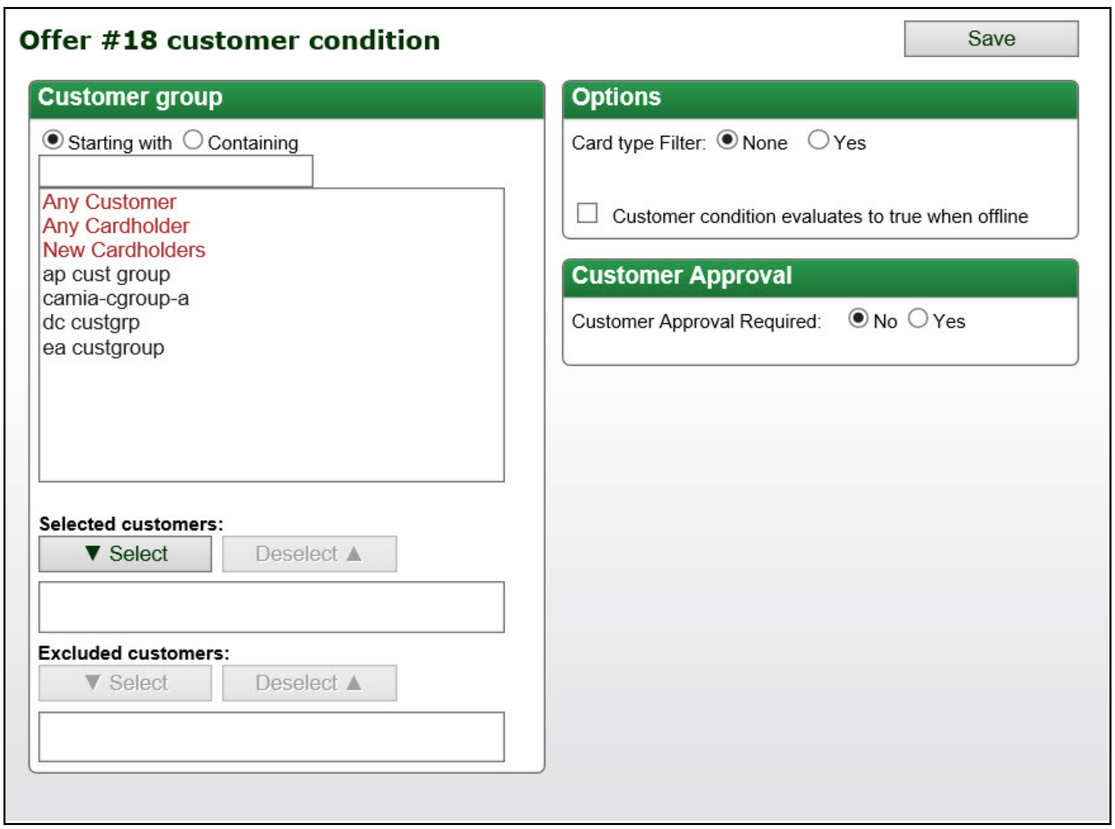
Before setting customer conditions, ensure that a customer group configuration exists in the system. For more information, refer to *Defining Customer Configuration* on page 357.

To set offer conditions, follow these steps:

1. Select any offers from the Offers page and then select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.

Note: By default, only the Customer condition is available from the Add a global condition drop–down list in the Add a condition section if no condition is yet configured for the offer. The Opt–in Conditions section is used for setting eligibility conditions. For more information, refer to *Eligibility Conditions* on page 249.

2. From the Add a condition section, select **Add**. The Customer Condition window is displayed.



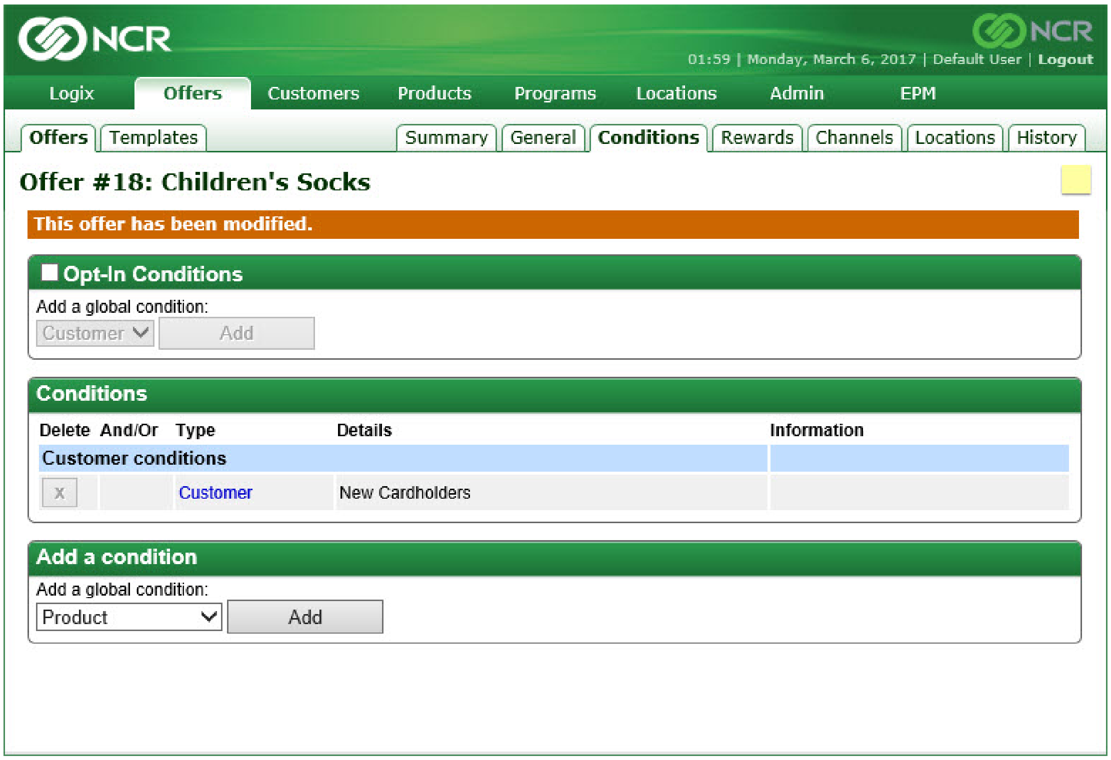
3. In the Customer group section, do any of the following:

   - Highlight a customer group name and then, use the **Select** button to set the customer group as eligible to receive the offer. The customer group is displayed in the Selected customers text box.

   - Highlight a customer group name and then, use the **Select** button to exclude the customer group from receiving the offer. The customer group name is displayed in the Excluded customers text box.

Note: If a customer does not exist in the local database, and the promotion engine is offline to Logix, the customer is eligible for both "Any Cardholder" offers and, offers that have the "Customer condition evaluates to true when offline" option enabled.

4. Select **Save**. The application displays the customer condition details in the Offer Conditions sub–page.



Setting Customer Conditions with Card Type

In setting a customer condition, an option is available to provide rewards only to customers who present specific card types.

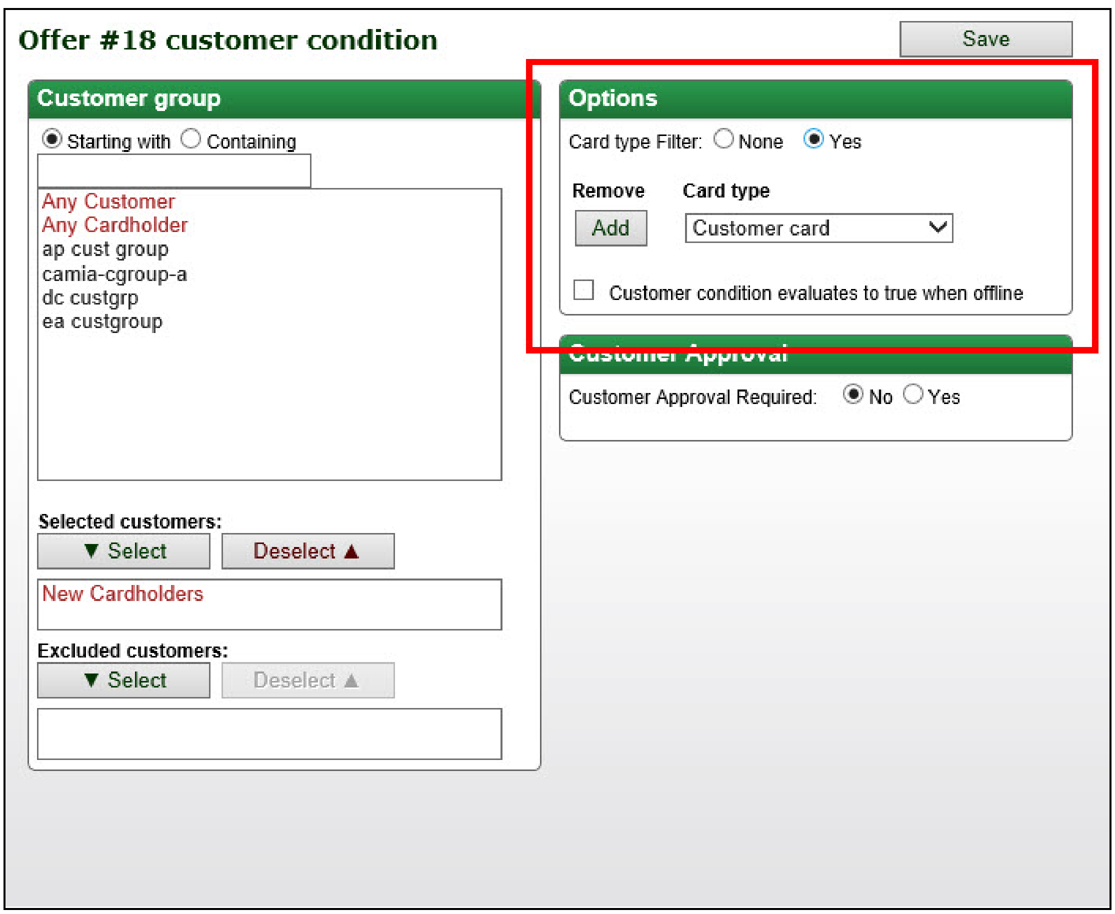
Example: The retailer wishes to encourage customers to sign up for a customer card in the store. The retailer then creates an offer that provides a 10% discount on all purchases for customers who present their customer card.

To set a customer condition with card types, follow these steps:

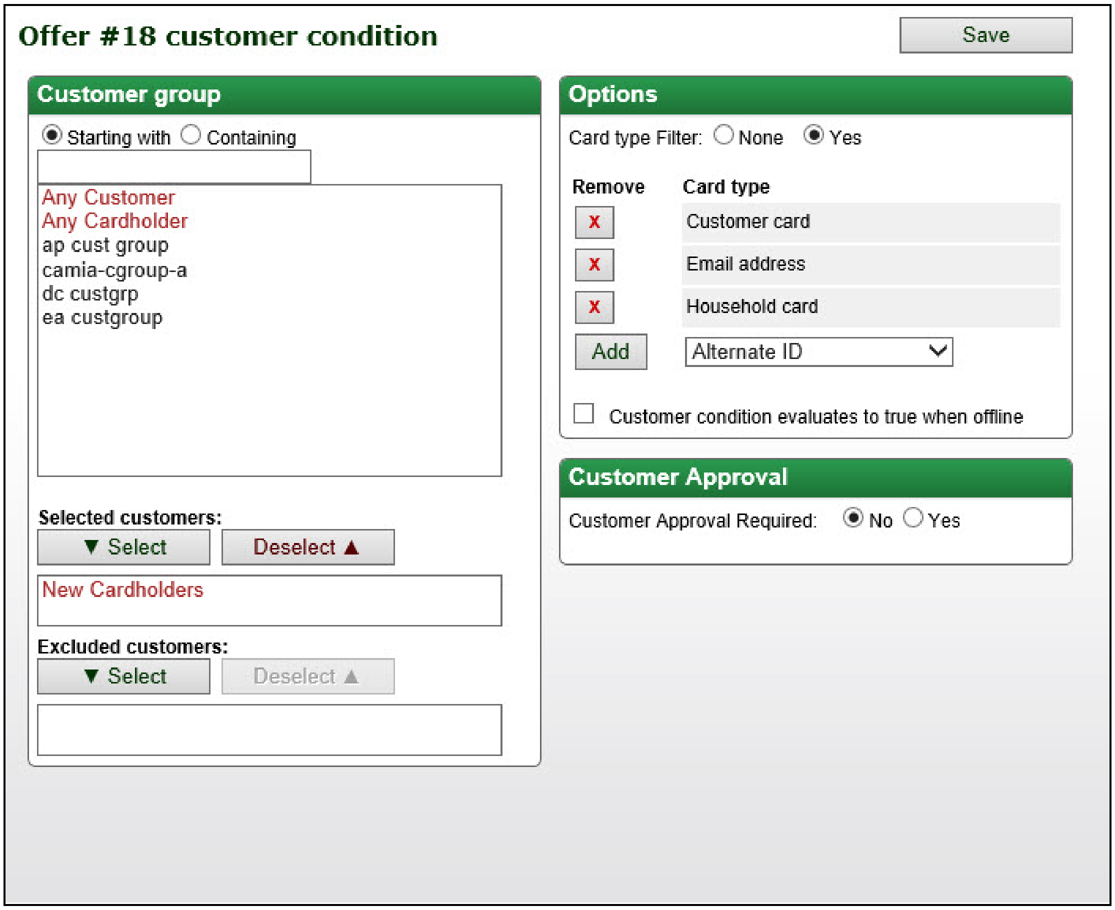
1. In the customer condition window, select a customer group.

Note: Selecting a card type in a customer condition is not applicable for *Any Customer*. If *Any Customer* is selected, the Card type Filter is automatically set to **None** and disabled.

2. In the Options section, select the **Yes** radio button for the Card type Filter. The Card type drop–down list is displayed.

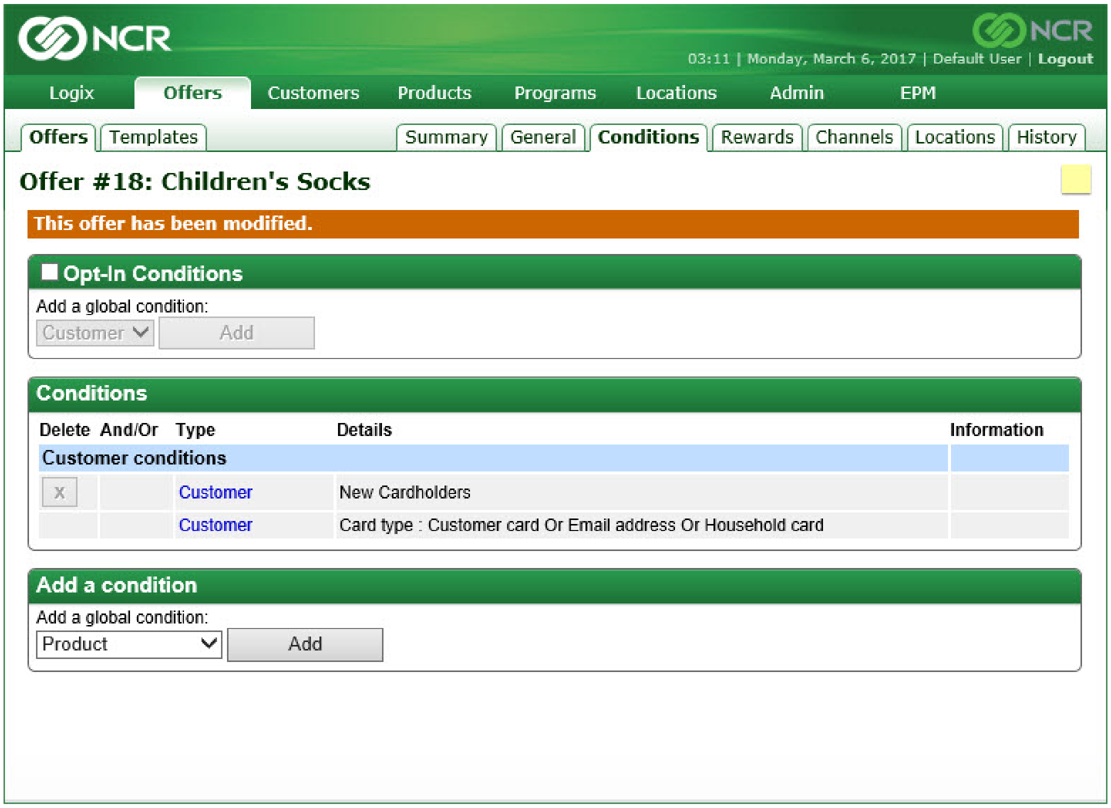


3. From the Card type drop–down list, select a card type, and then select **Add**. The retailer may select more than one card type, as shown in this example.

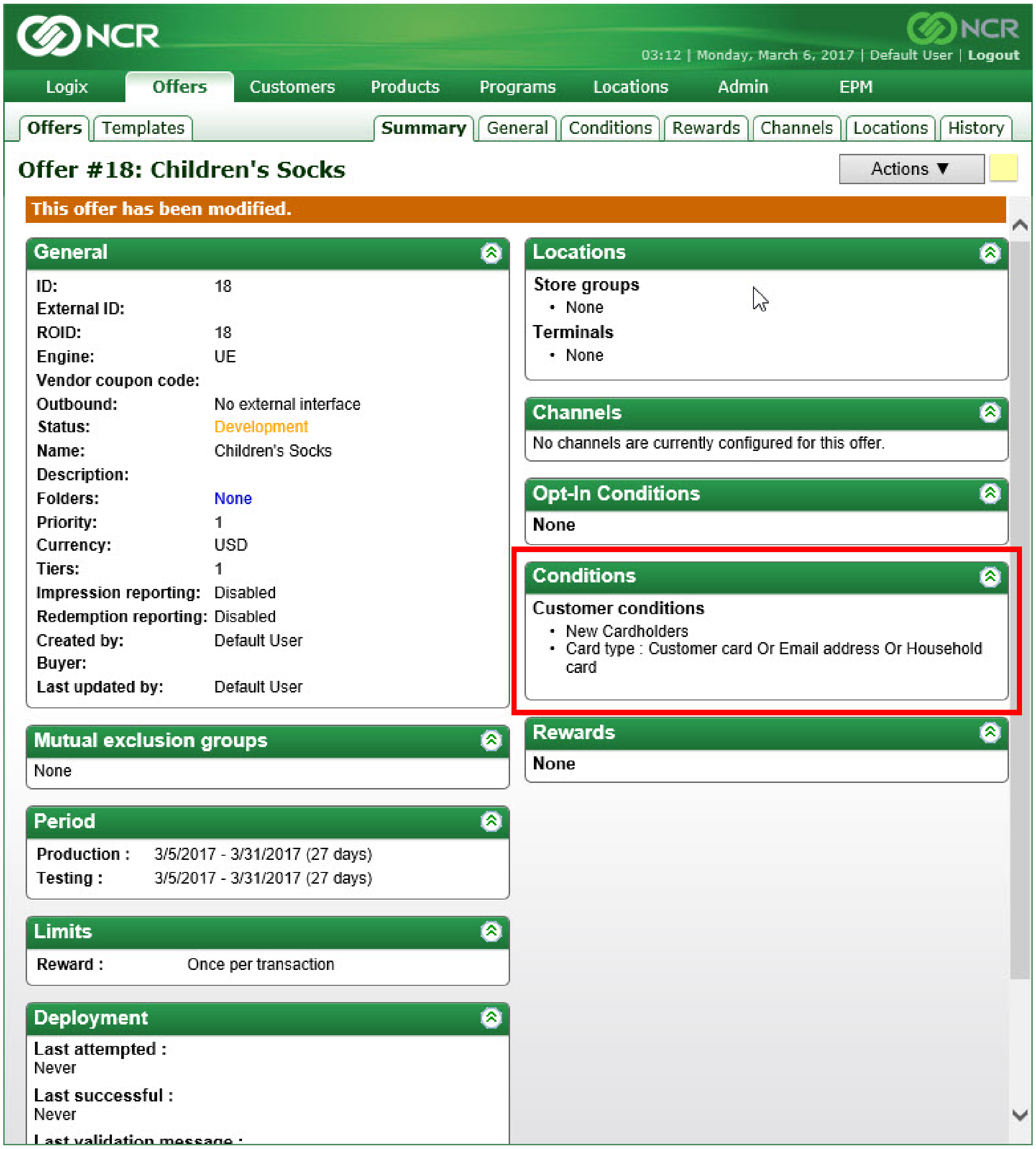


Note: To remove a card type, select the remove (X) button.

4. Select **Save**. The application displays the customer condition and card type details in the Offer Conditions sub–page.



The card type details are also displayed in the Offer Summary sub–page.



Setting Customer Conditions with Customer Approval

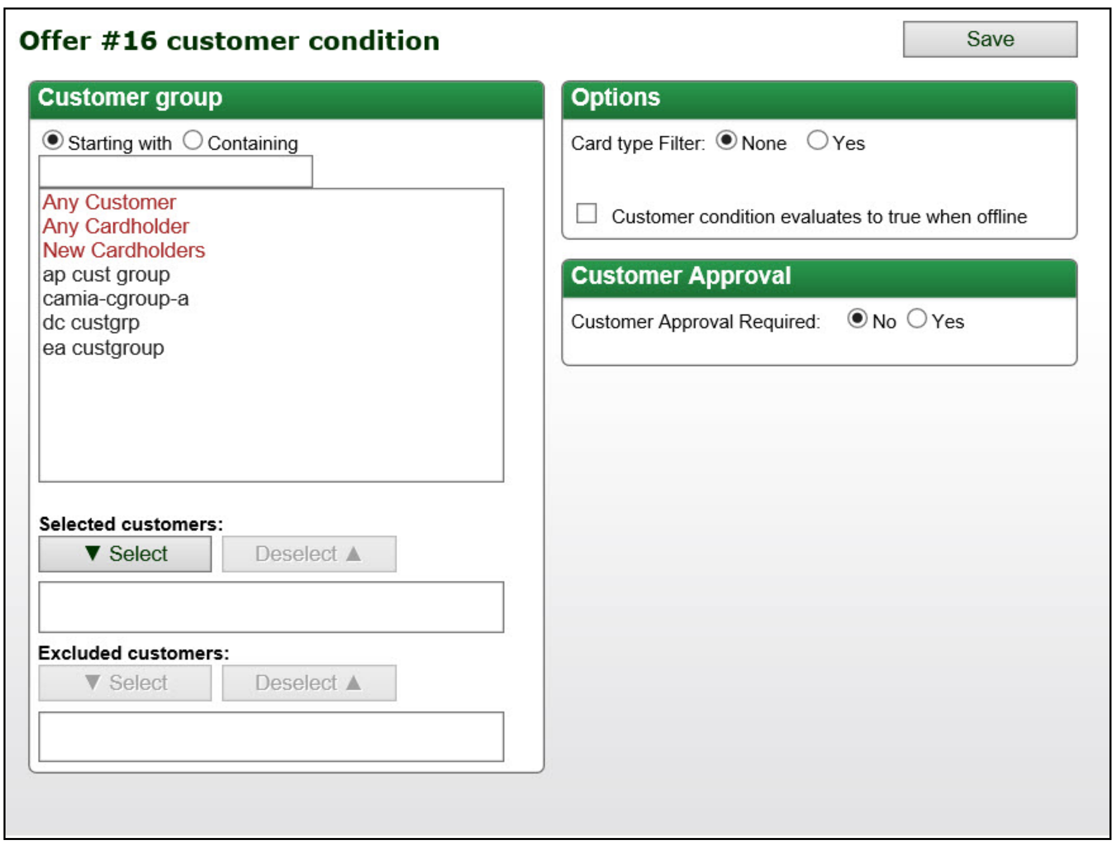
In setting a customer condition, retailers can configure the condition to provide customers the option on whether to redeem an offer in their transaction or not.

Example: A customer is eligible for a $10.00 discount from the total transaction amount. The customer is provided an option to redeem the offer, in which case $10.00 is deducted from the total transaction amount. The customer may choose not to redeem the offer, in which case the $10.00 deduction is not applied to the total transaction amount.

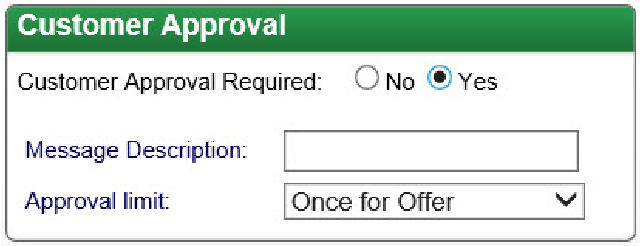
A customer may choose not to provide any answer when presented with the options. In this case, the offer condition is not met, and the customer does not receive the offer in the transaction.

To set a customer condition with customer approval, follow these steps:

1. In the customer condition window, select a customer group.



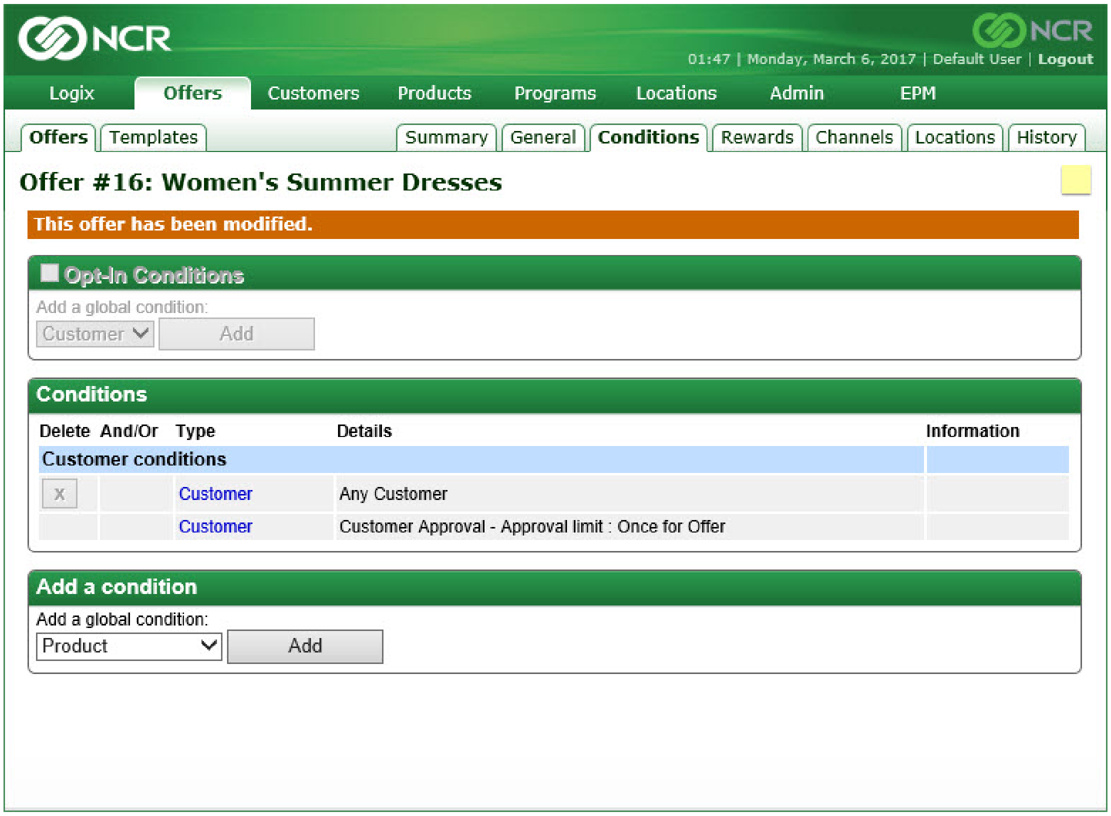
2. In the Customer Approval section, select **Yes**. Additional settings are displayed.



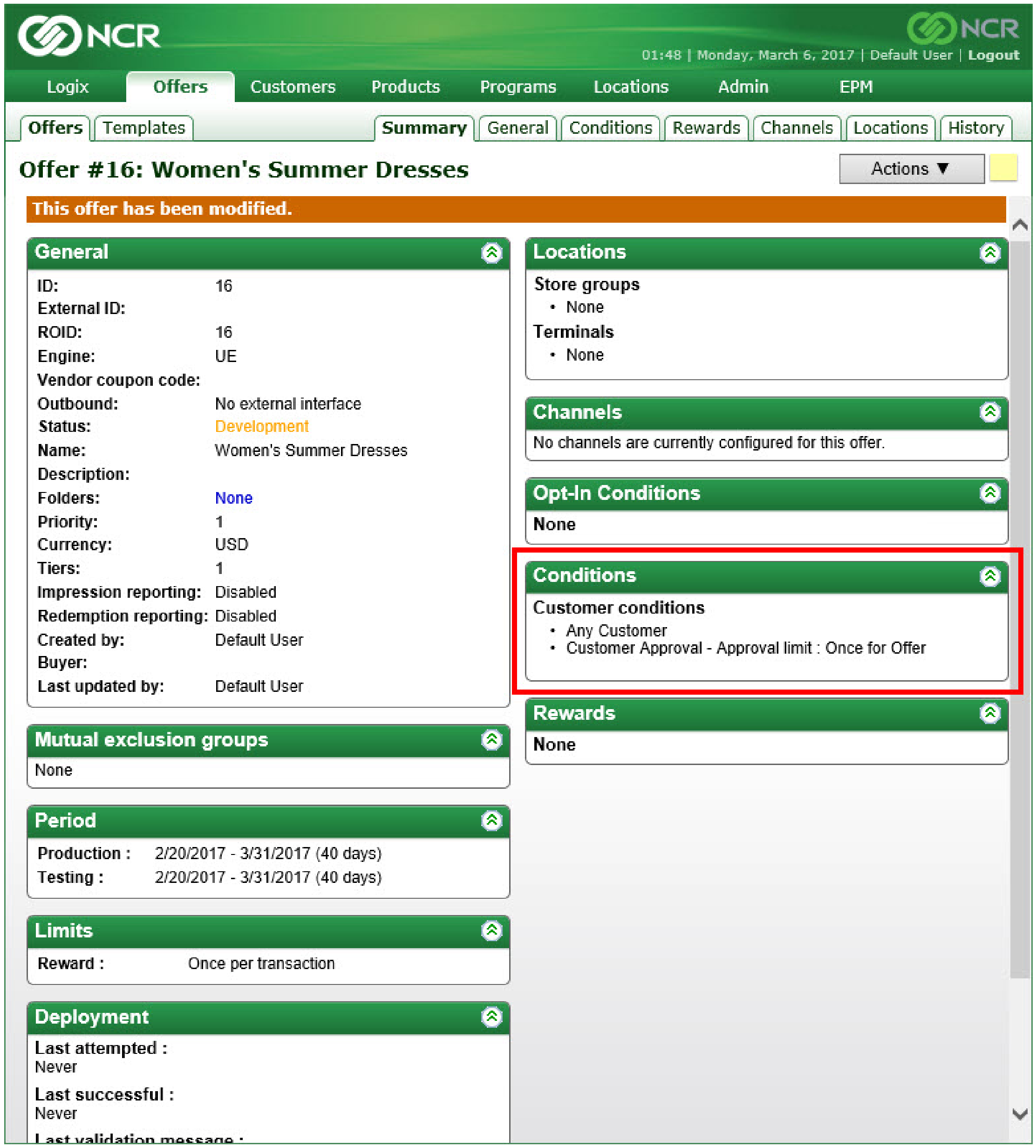
3. In the **Message Description** field, enter the text that is displayed at the POS. This text is intended for the customer and is displayed only if all the other conditions of the offer are met.
4. Select an approval limit from the drop–down list:
   - **Once for Offer**—the customer is asked to approve only once for all the offer redemption that may occur during the transaction.
   - **Each offer redemption**—the customer is asked to approve each offer redemption that may occur during the transaction.

   Example: In an offer, the customer is eligible to redeem the offer twice. If Once for Offer was selected for the approval limit, the Message Description text displays only once. Otherwise, the text is displayed twice, one for each offer redemption instance.

5. Select **Save**. The system displays the customer condition and customer approval details in the Offer Conditions sub–page.



The customer approval details are also displayed in the Offer Summary sub–page.

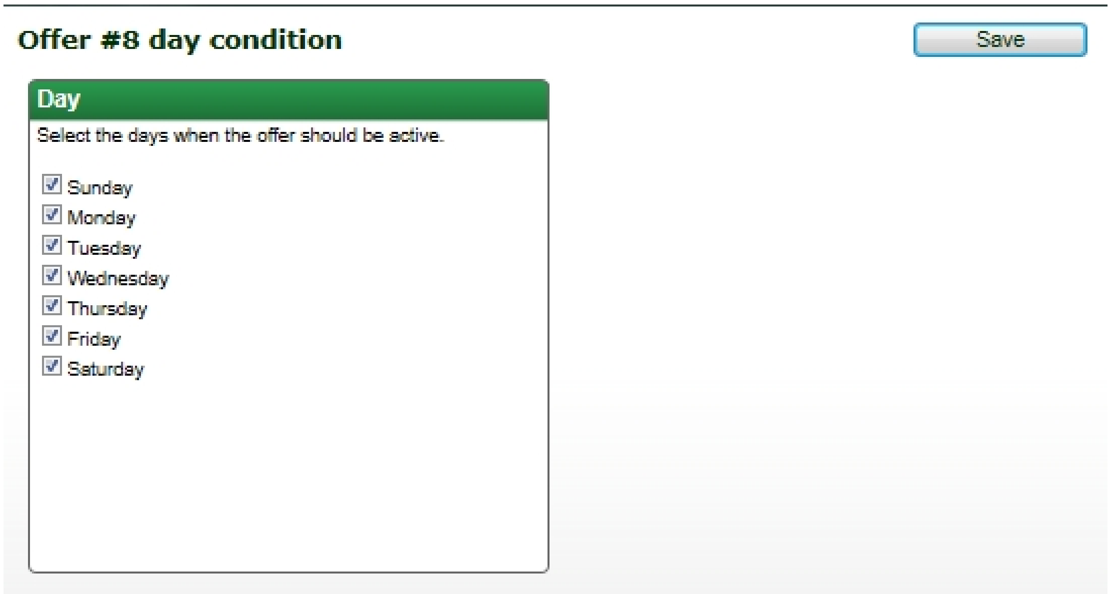


Note: If the customer approval is set in a customer condition, adding a Gift Card reward in the offer is disabled.

Setting Day Conditions

To set day conditions, follow these steps:

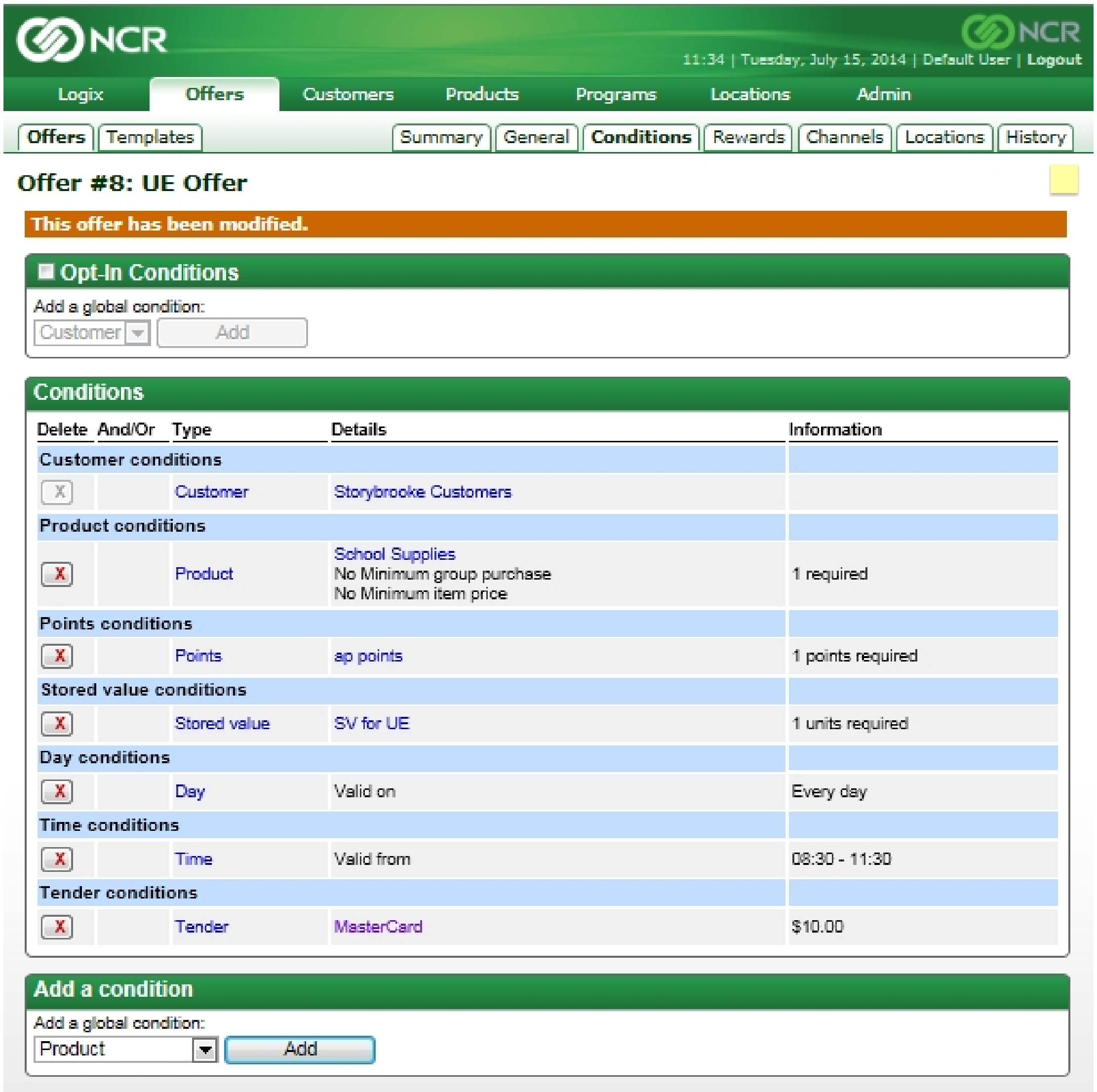
1. Select any offers from the Offers page and then select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.
2. From the Add a condition section, select **Day** from the drop–down list.
3. Select **Add**. The Day Condition window is displayed.



Note: By default, all days are selected.

4. Select the days of the week during which the offer is available.

5. Select **Save**. The application displays the day condition details in the Offer Conditions sub–page.



Setting Instant Win Conditions

Instant win conditions give customers a chance to redeem an offer as a prize based on chance. Logix permits users to set two types of instant win conditions:

- **Random** winners. For more information, refer to *Setting Random Winners* on the next page.
- **Sequential** winners. For more information, refer to *Setting Sequential Winners* on page 212.

Note: Instant win conditions can appear only once within an offer.

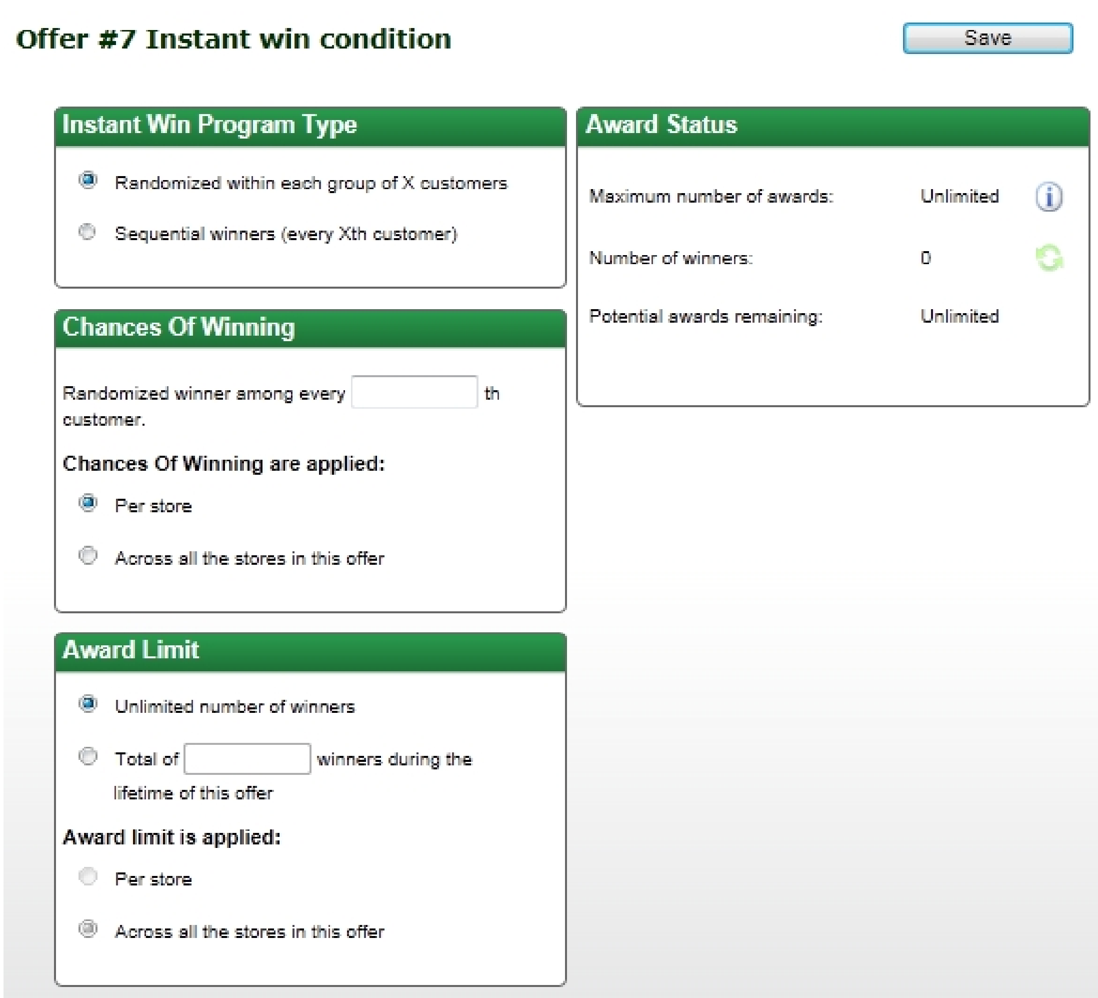
In the transaction, if the winning customer (random or sequential) voids an item that qualified that customer for the instant win offer, one of the following two things occur:

- If the transaction is complete, the chance of winning is used up and is not available for the next customer.
- If the transaction is voided before completing, the chance of winning is not used up and is available for the next customer.

Setting Random Winners

A random winner means that, given the odds of 1:100, one customer out of every 100 meets the instant win condition. The winner is determined randomly. To set an instant win condition for random winners, follow these steps:

1. Select any offers from the Offers page and then select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.
2. From the Add a condition section, select **Instant win** from the drop–down list.
3. Select **Add**. The Instant Win Condition window is displayed.
4. From the Instant Win Program Type section, select **Randomized within each group of X customers**.



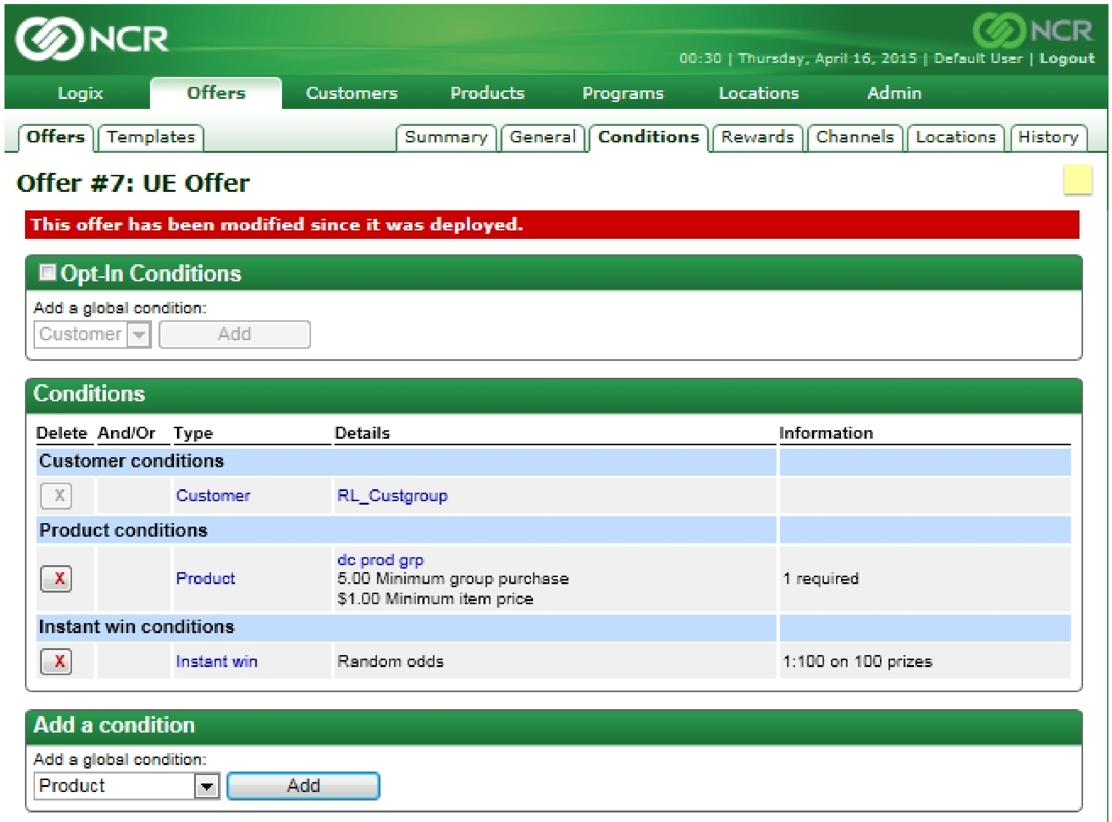
Note: Once the offer is successfully deployed and is active, the "Chances of winning are applied" and "Award Limit is applied" options are disabled.

5. Use the following table to set parameters in specific sections:

In the section	Do the following:
Chances of Winning	1. Enter the value for the customers chances of winning. It is expressed as 1:x. **Example:** Odds of 1:100 means that one customer out of every 100 passes the condition. 2. Select how the chances of winning is applied: • **Per store**—chances of winning is tracked at the store level. **Example:** The offer is one out of every 50 customers wins a free movie ticket. The customer is randomly picked from every 50 customers transacting in the store. • **Across all the stores in this offer**—chances of winning is tracked at the enterprise level. **Example:** The offer is one out of every 50 customers wins a free movie ticket. The customer is randomly picked from every 50 customers transacting in any of the stores belonging to the enterprise. **Note:** Selecting this option permits the offer to work across the group of stores selected in the Locations sub–page tab. For more information, refer to *Setting Store Group Locations* on page 355.
Award Limit	1. Select the award limit by: • Selecting **Unlimited number of winners** if there is an unlimited number of Instant Win awards available for the offer. • Entering a specific number of winners. 2. Select how the award limit is applied: • **Per store**—the limits are applied and tracked at the store level. • **Across all the stores in this offer**—the limits are applied and tracked across the group of stores selected in the Locations sub–page tab. For more information, refer to *Setting Store Group Locations* on page 355. **Note:** This option affects the information displayed in the Award Status section.
Award Status	Displays the following information:

In the section	Do the following:
	• **Maximum number of awards**—depends on how the award limit is applied: • If no limit is applied, it displays Unlimited. • If a limit is applied per store, it displays the value that is equal to the total number of winners multiplied by the number of stores to which the offer is deployed. • If a limit is applied across all the stores in the offer, it displays the total number of winners set in the Award Limit section. • **Number of winners**—displays the current number of winners. • **Potential awards remaining**—depends on the award limit settings: • If no limit is applied, it displays Unlimited. • If a limit is applied, it displays the value that is calculated based on the maximum number of awards minus the number of winners. **Note:** To display updated values, ensure that the Promotion Broker IP address along with port number option is configured. For more information, refer to *Miscellaneous Options* on page 734.

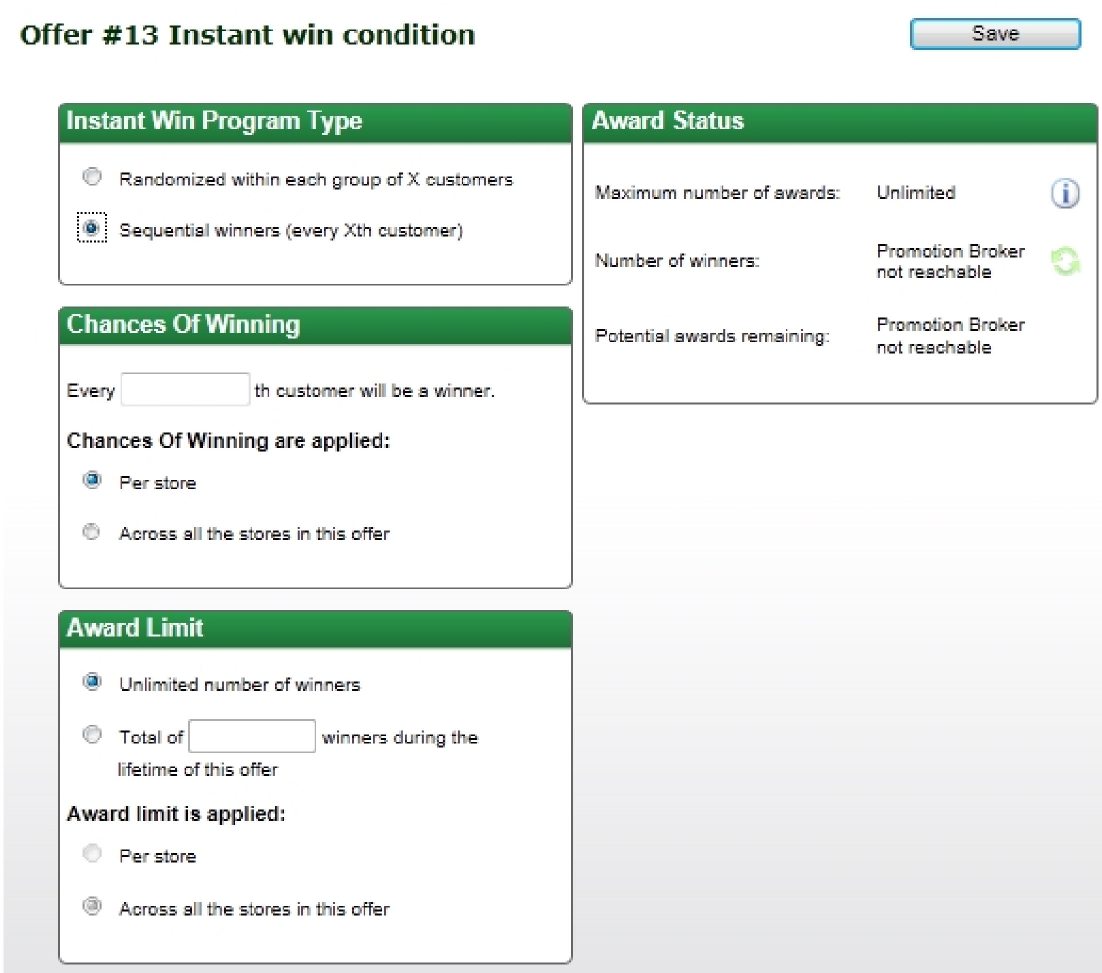
3. Select **Save**. The application displays the instant win condition details in the Offer Conditions sub–page.



Setting Sequential Winners

A sequential winner means that, given the odds of 1:100, every hundredth customer meets the instant win condition. To set an instant win condition for sequential winners, follow these steps:

1. Select any offers from the Offers page and then select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.
2. From the Add a condition section, select **Instant win** from the drop–down list.
3. Select **Add**. The Instant Win Condition window is displayed.
4. From the Instant Win Program Type section, select **Sequential winners (every Xth customer)**. The application displays the following options:



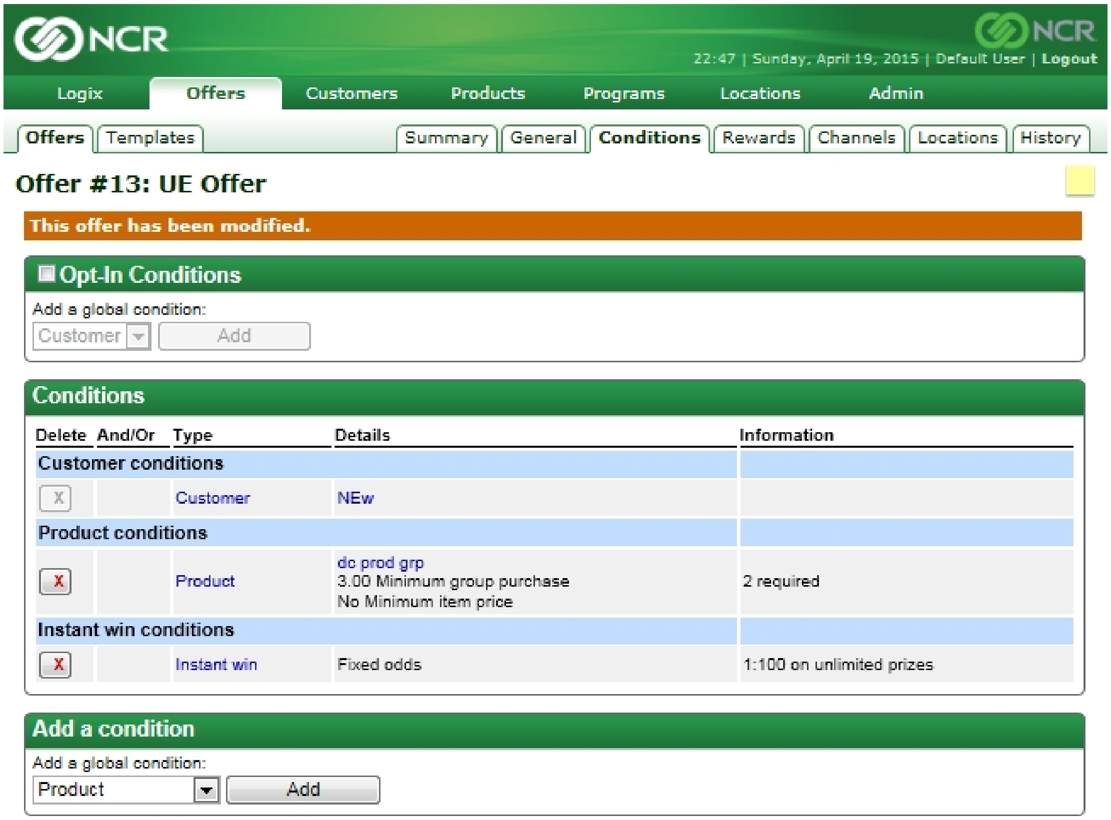
Note: Once the offer is successfully deployed and active, the "Chances of winning are applied" and "Award Limit is applied" options are disabled.

5. Use the following table to set parameters in specific sections:

In the section	Do the following:
Chances of Winning	1. Enter the value of the customer sequence number that you want to win. **Example:** Entering 50 means the 50th customer is the winner. 2. Select how the chances of winning is applied: • **Per store**—chances of winning is tracked at the store level. **Example:** The offer is every 10th customer can win a free movie ticket. Therefore, the 10th customer transacting in the store will win the movie ticket. • **Across all the stores in this offer**—chances of winning is tracked at the enterprise level. **Example:** The offer is every 10th customer can win a free movie ticket. Therefore, the 10th customer could be from any of the stores belonging to the enterprise winning the movie ticket. **Note:** Selecting this option permits the offer to work across the group of stores selected in the Locations sub–page tab. For more information, refer to *Setting Store Group Locations* on page 355.
Award Limit	1. Select the award limit by: • Selecting **Unlimited number of winners** if there is an unlimited number of Instant Win awards available for the offer. • Entering a specific number of winners. 2. Select how the award limit is applied: • **Per store**—the limits are applied and tracked at the store level. • **Across all the stores in this offer**—the limits are applied and tracked across the group of stores selected in the Locations sub–page tab. For more information, refer to *Setting Store Group Locations* on page 355. **Note:** This option affects the information displayed in the Award Status section.
Award Status	Displays the following information:

In the section	Do the following:
	• **Maximum number of awards**—depends on how the award limit is applied: ◦ If no limit is applied, it displays Unlimited. ◦ If a limit is applied per store, it displays the value that is equal to the total number of winners multiplied by the number of stores to which the offer is deployed. ◦ If a limit is applied across all the stores in the offer, it displays the total number of winners set in the Award Limit section. • **Number of winners**—displays the current number of winners. • **Potential awards remaining**—depends on the award limit settings: ◦ If no limit is applied, it displays Unlimited. ◦ If a limit is applied, it displays the value that is calculated based on the maximum number of awards minus the number of winners. **Note:** To display updated values, ensure that the Promotion Broker IP address along with port number option is configured. For more information, refer to *Miscellaneous Options* on page 734.

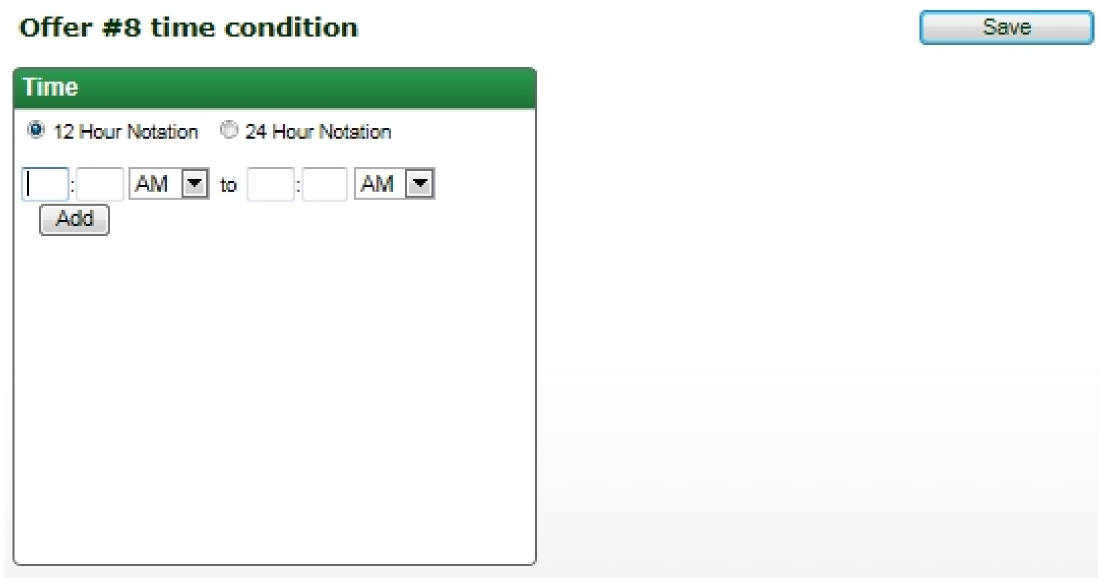
3. Select **Save**. The application displays the instant win condition details in the Offer Conditions sub–page.



Setting Time Conditions

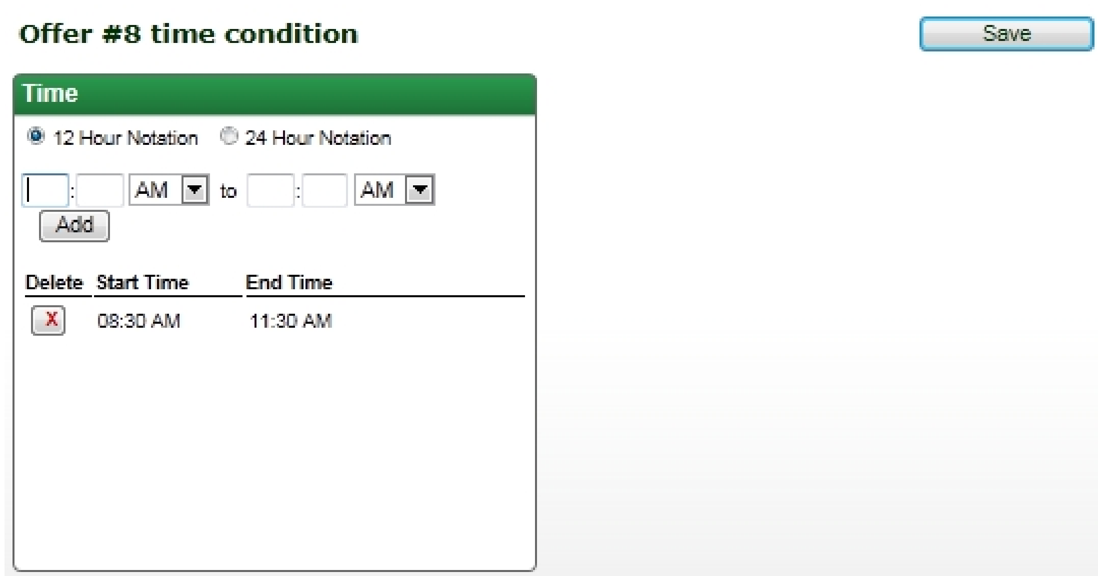
To set time conditions, follow these steps:

1. Select any offers from the Offers page and then select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.
2. From the Add a condition section, select **Time** from the drop–down list.
3. Select **Add**. The Time Condition window is displayed.



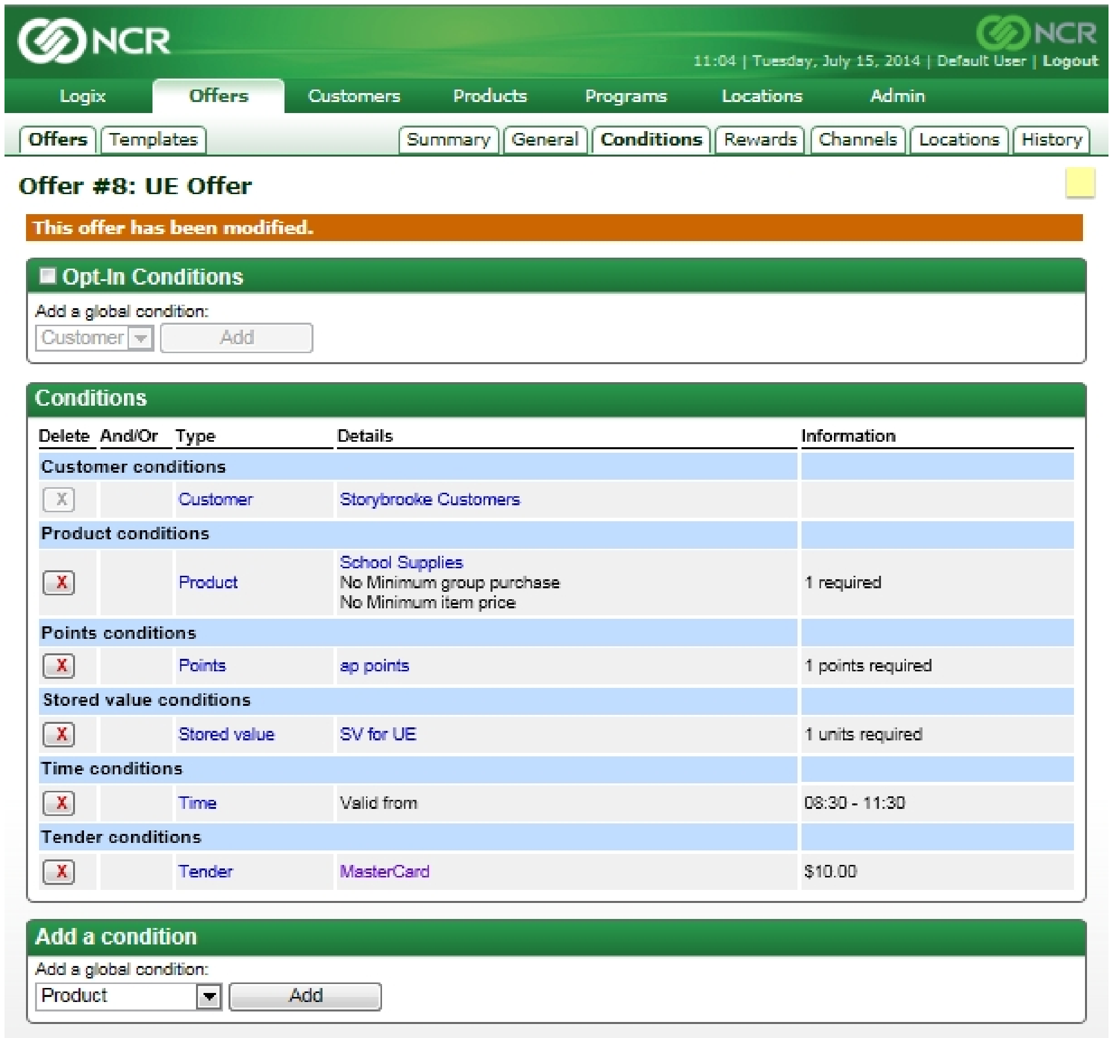
Note: Times can be entered with either 12–hour or 24–hour notation. But, the time condition is displayed in 24–hour notation on the Offer Conditions sub–page.

4. Enter the start time and end time.
5. Select **Add**. The application displays the time slot details.



Note: Selecting the X button deletes the time slot. Additional time slots can be added to the condition but, they must be within a single day. For example, a condition of 11PM to 2AM cannot be created. It should be two conditions, one from 11PM to midnight, and the other from midnight to 2AM.

6. Select **Save**. The application displays the time condition details in the Offer Conditions sub–page.



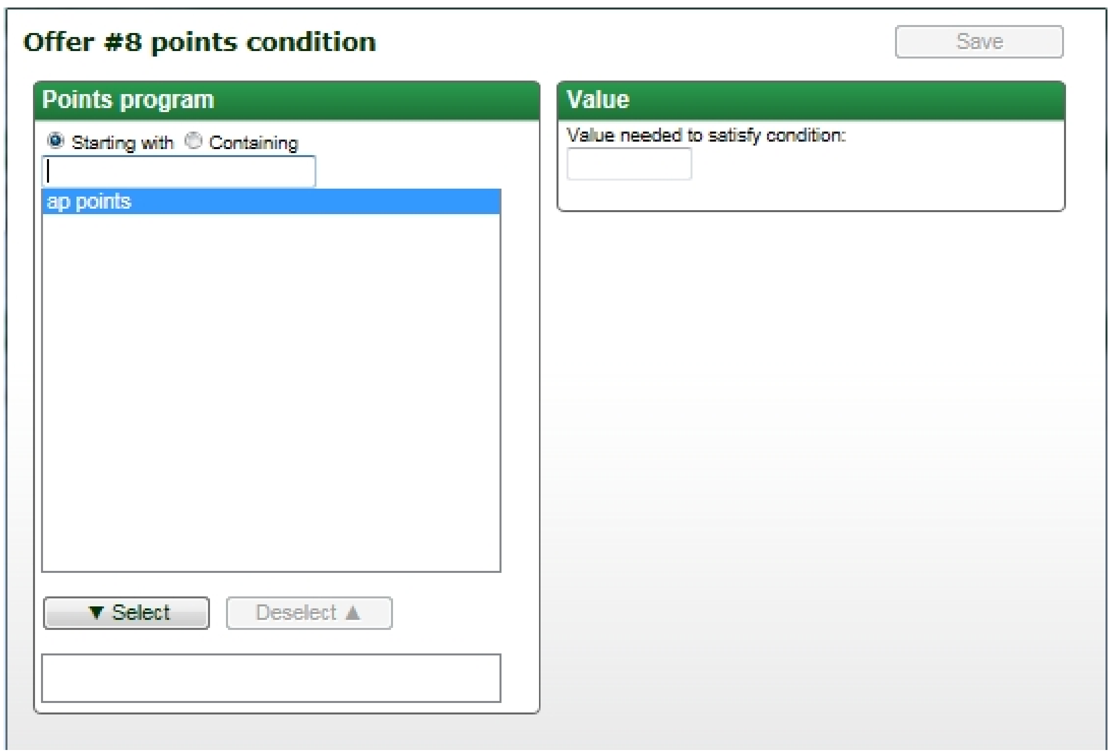
Setting Points Conditions

Points conditions are used to trigger an offer when a customer accumulates a certain number of points in a particular program. Before setting points conditions, ensure that a points program is configured in the system. For more information, refer to *Creating Points Programs* on page 488.

To set points conditions, follow these steps:

Note: To set this condition, ensure that the customer group eligible to receive the offer are cardholders.

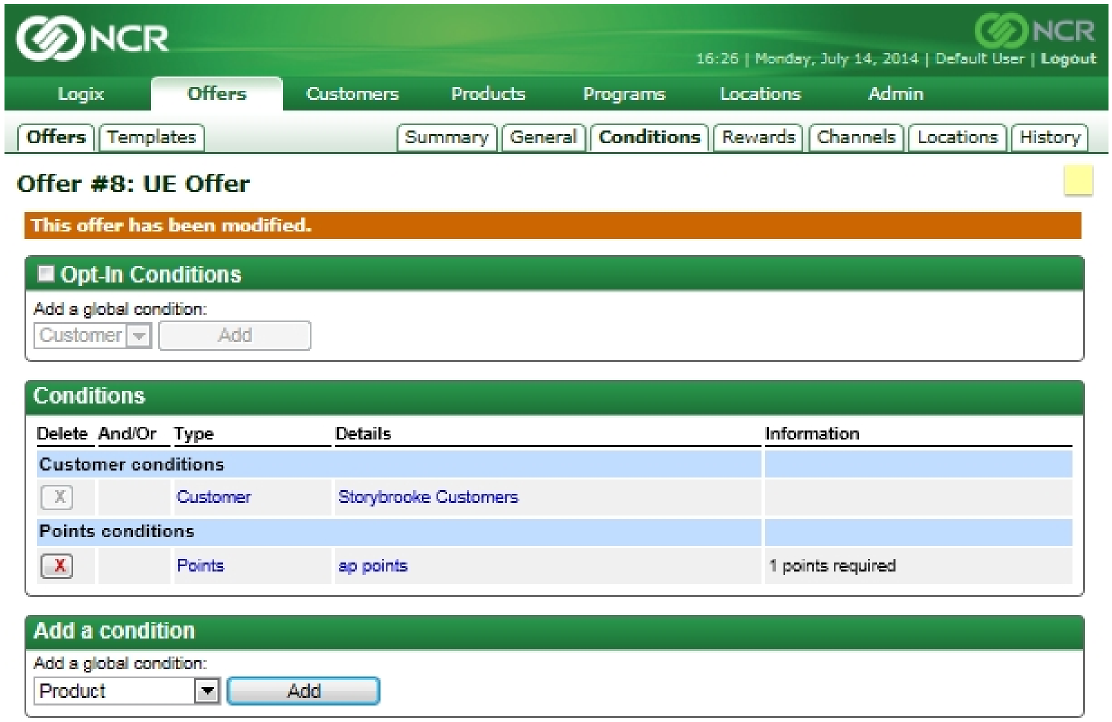
1. Select any offers from the Offers page and then select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.
2. From the Add a condition section, select **Points** from the drop–down list.
3. Select **Add**. The Points Condition window is displayed.



4. Use the following table to set parameters in specific sections:

In the section	Do the following:
Point program	Highlight a points program name and then, use the **Select** button to set the points program as the condition for the offer to take effect. The points program is displayed in the bottom text box.
Value	Enter the quantity of points that must be accumulated in order to meet the condition.

5. Select **Save**. The application displays the points condition details in the Offer Conditions sub–page.



Setting Product Conditions

Product conditions are used to trigger an offer when certain items are purchased. Logix permits users to set product conditions for two types of product groups:

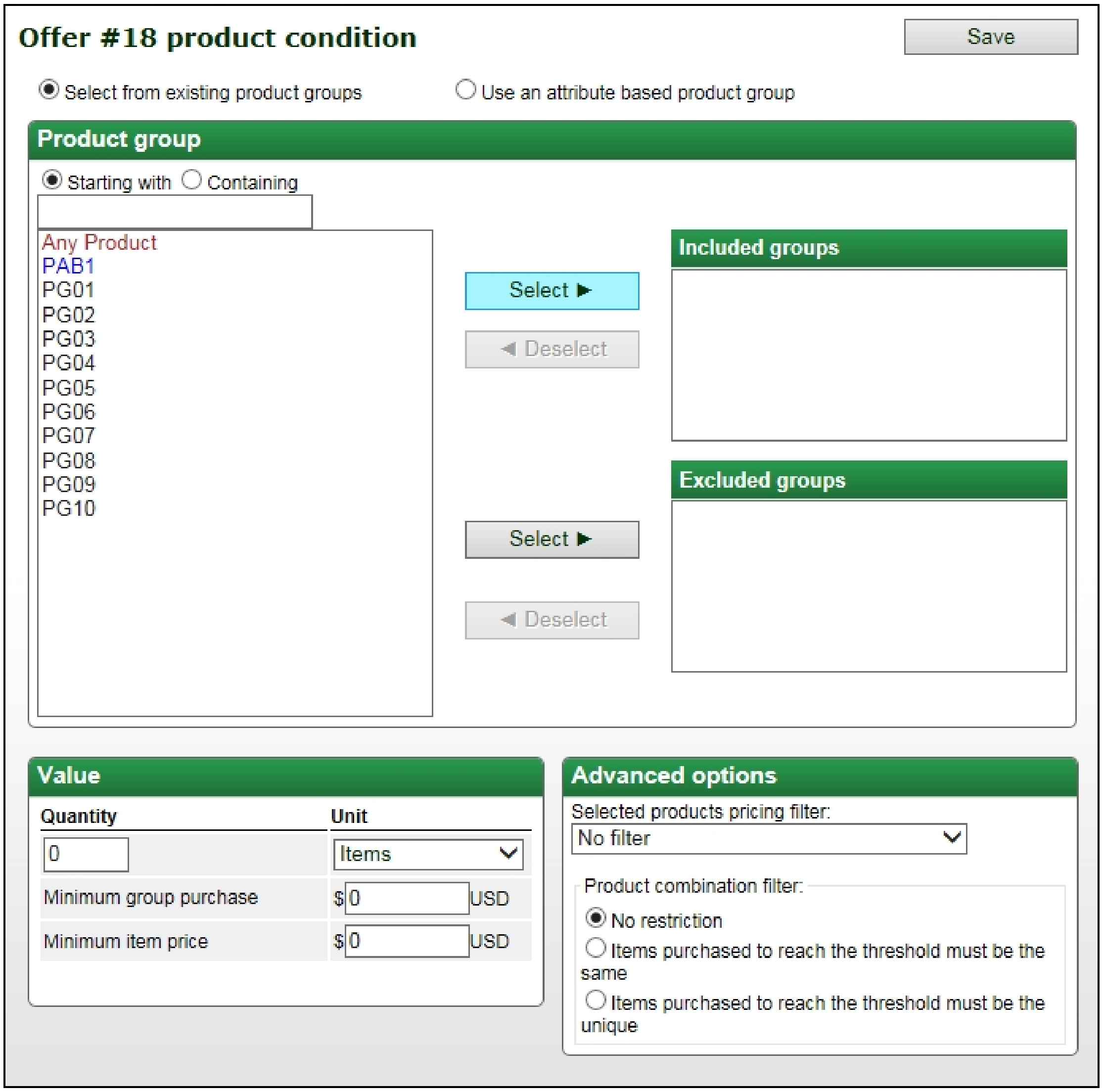
- Standard product group
- Attribute–based product group

Note: Before creating product conditions, ensure that a standard or an attribute–based product group configuration exists in the system. For more information, refer to the following sections:

- Creating Standard Product Groups
- Creating Attribute–Based Product Groups

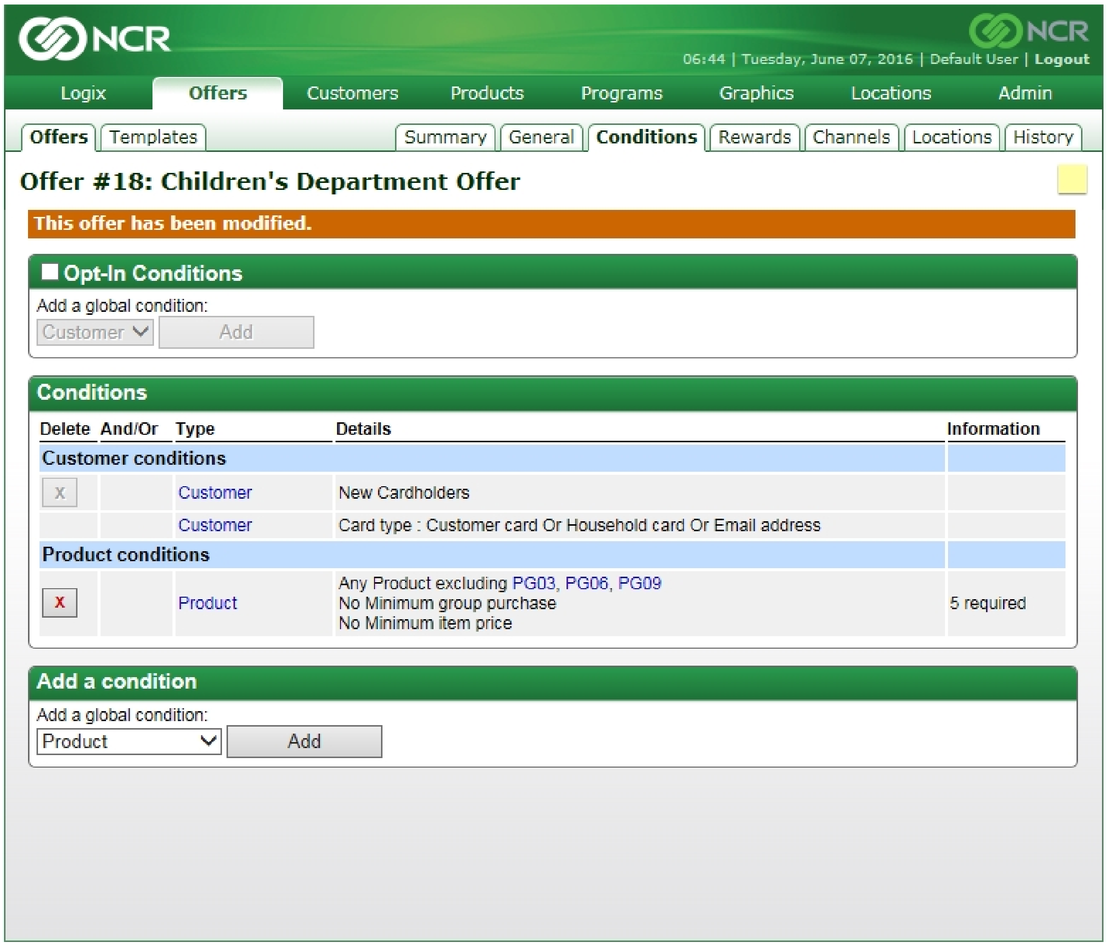
To set product conditions, follow these steps:

1. Select any offers from the Offers page and then select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.
2. From the Add a condition section, select **Product** from the drop–down list.
3. Select **Add**. The Product Condition window is displayed.



4. Select the **product group type**. For more information, refer to Setting the Product Group type on page 223.
5. Select the **product condition value**. For more information, refer to Setting Values for Product Conditions on page 228.
6. Set the **advanced options**. For more information, refer to Setting the Advanced options on page 237.

7. Select **Save**. The application displays the product condition details in the Offer Conditions sub–page.

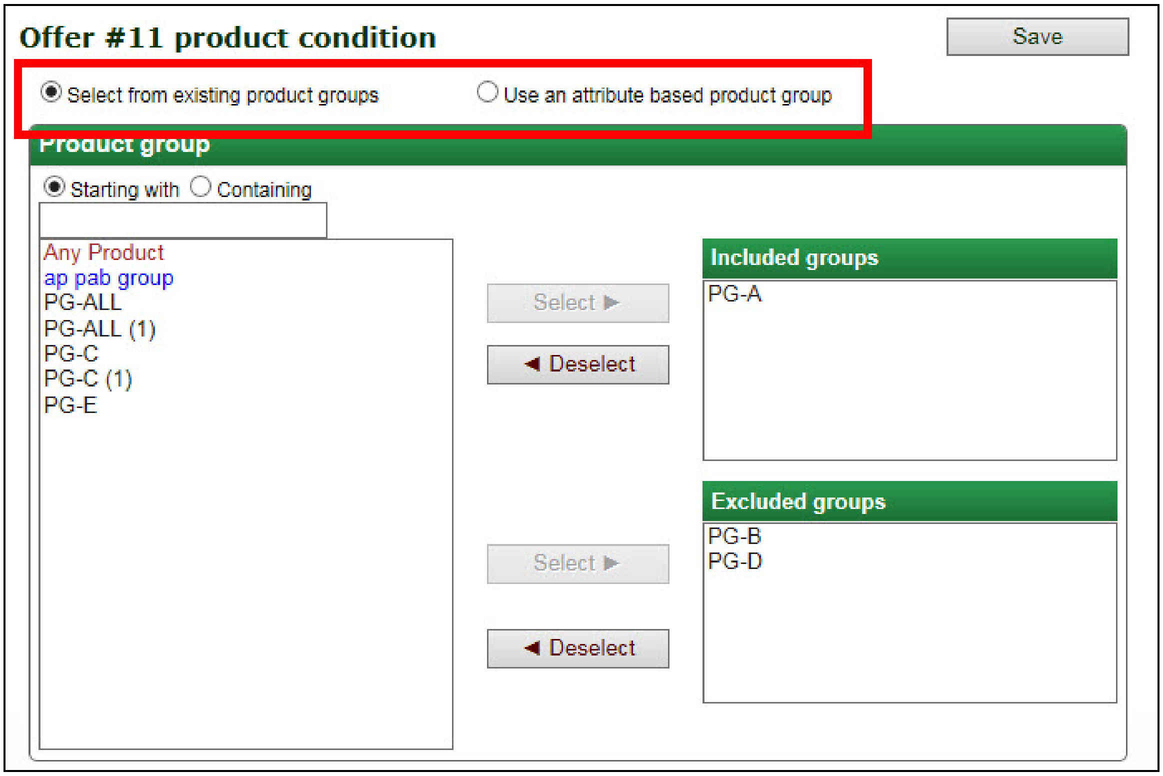


Note: Multiple product conditions can be created within an offer. For more information, refer to *Creating Multiple Product Conditions* on page 239.

Setting the Product Group type

The Product Condition window displays the following options for selecting the product group type:

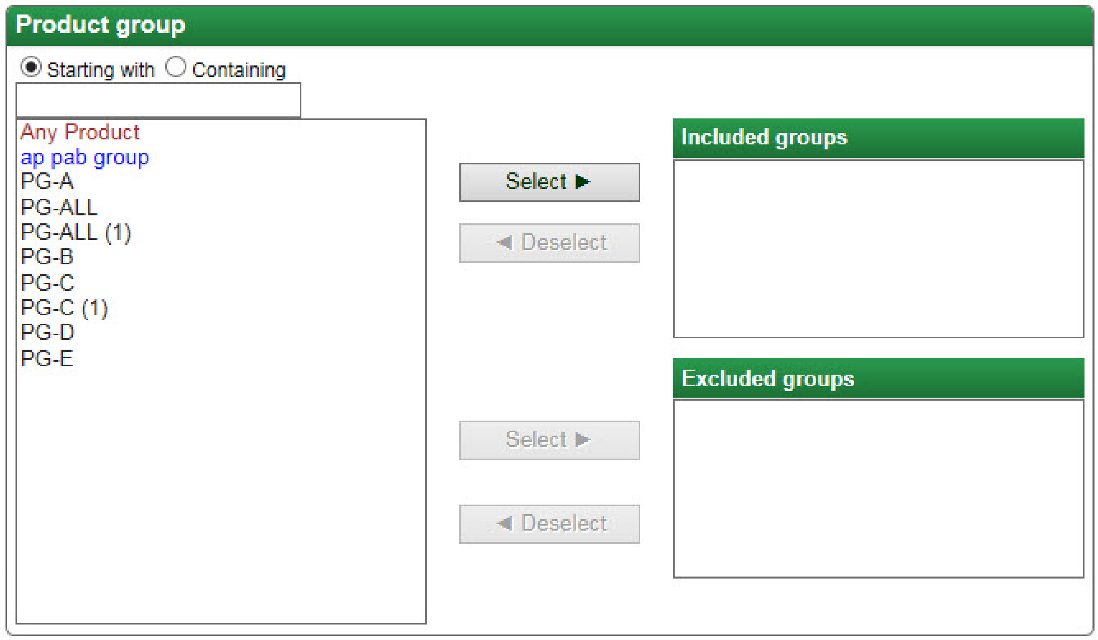
- Select from existing product groups *(selected by default)*
- Use an attribute based product group



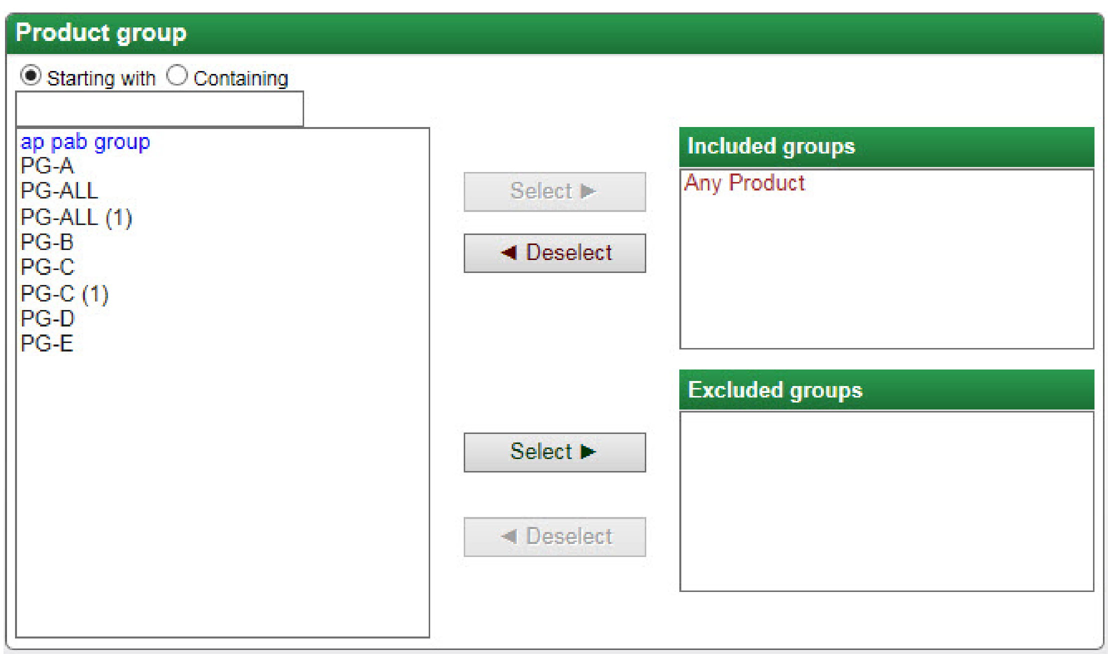
Existing Product Groups

To select a product group from the existing product groups, follow these steps:

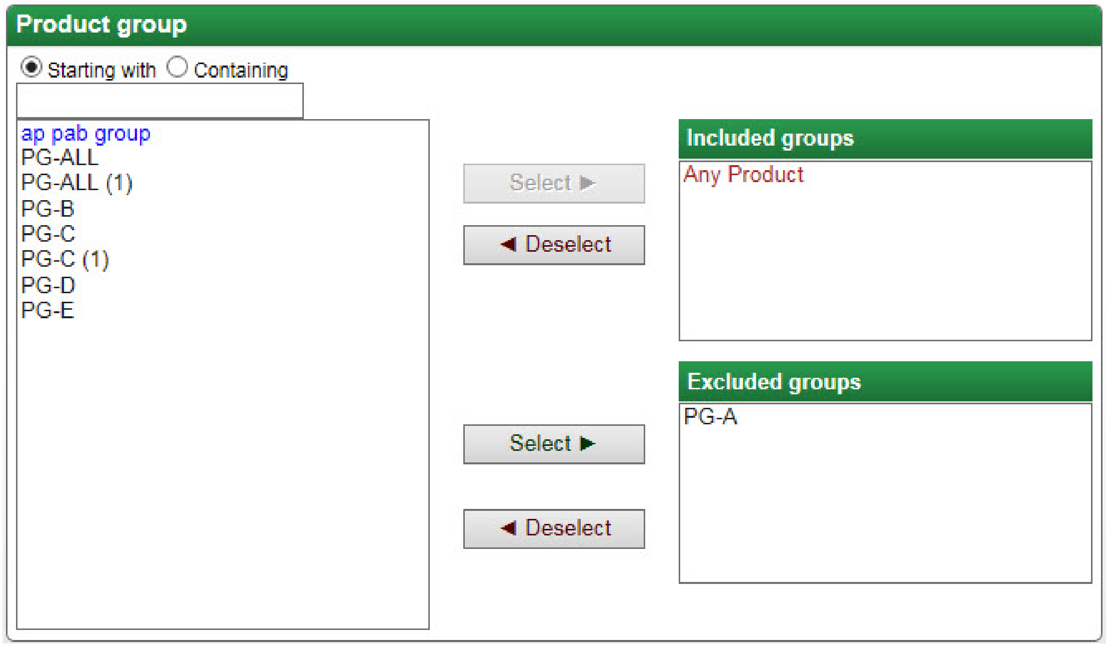
1. From the Product Condition window, select the **Select from existing product groups** radio button. The Product group section is displayed.



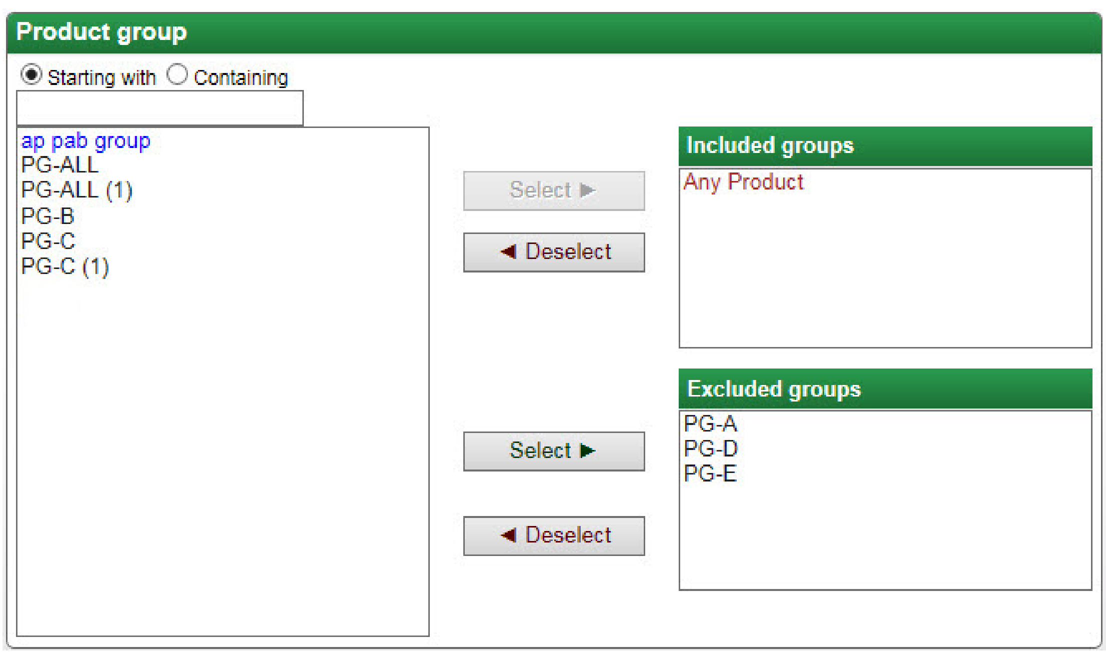
2. In the Product Group section, highlight a product group name and then, use the **Select** button to include the product group in the offer. The product group is displayed in the Included groups list box. In this example, Any Product is included.



3. To exclude a product group from receiving the offer, highlight a product group name in the Product Group section and then, use the **Select** button to exclude the product group from the offer. The product group is displayed in the Excluded groups list box. In this example, the product group PG–A is excluded.



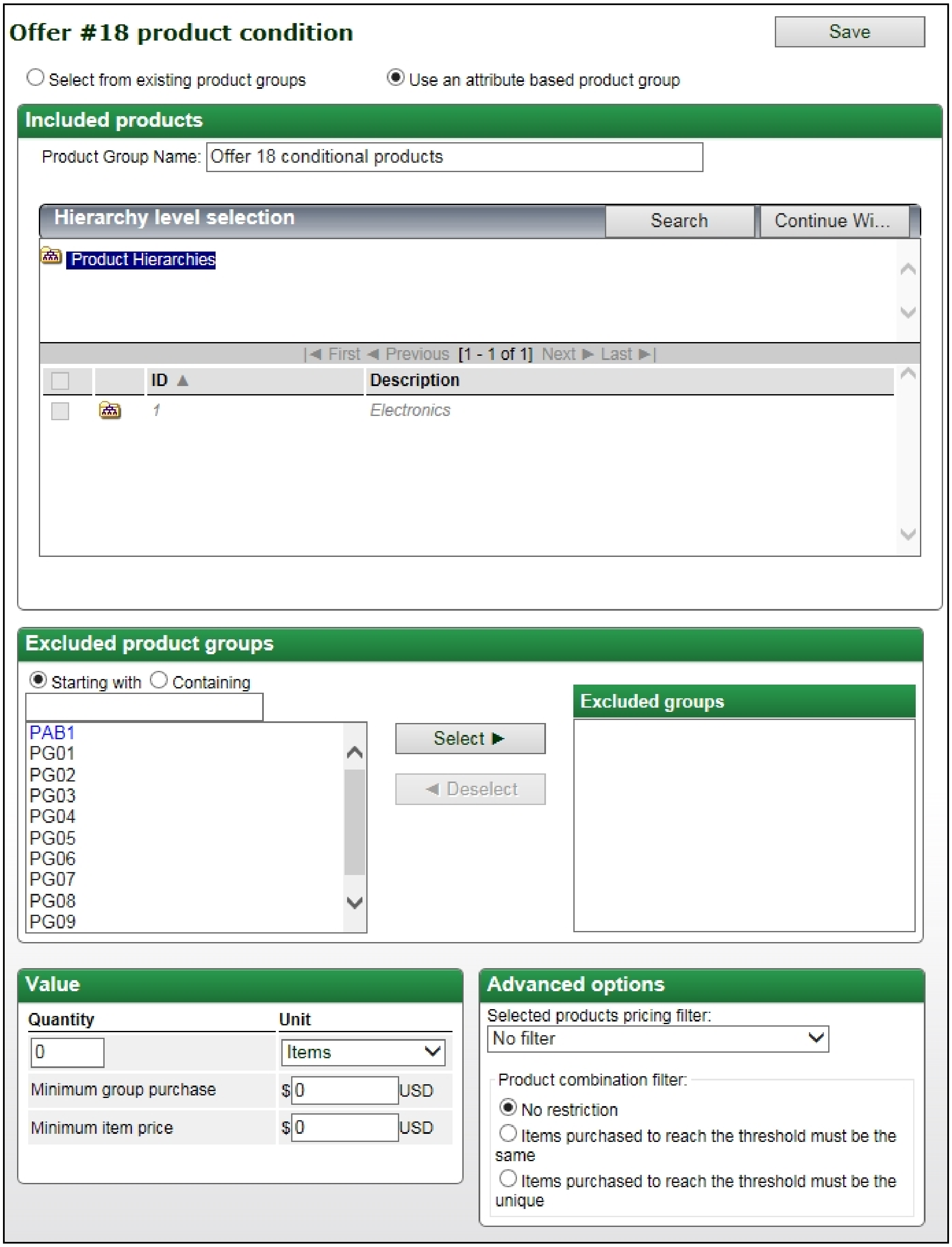
Multiple product groups can be excluded in product conditions, as shown in this example.



Attribute Based Product Groups

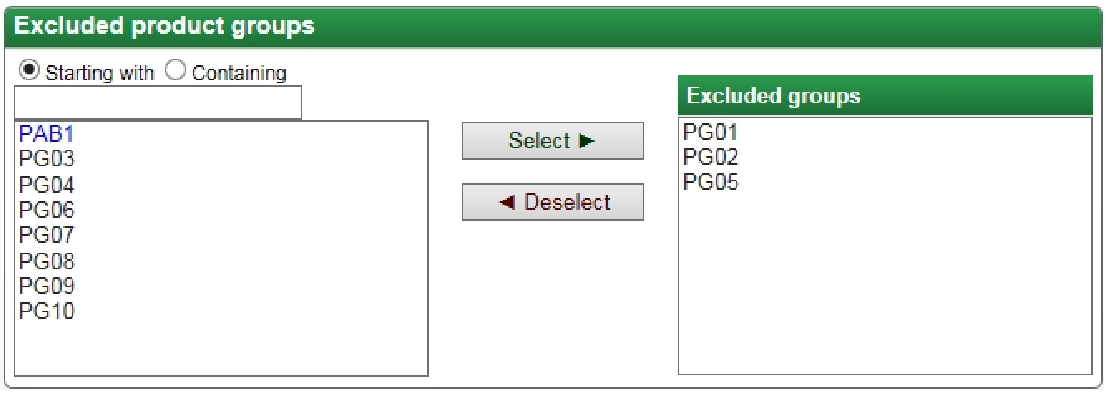
To select a product group based on its attribute, follow these steps:

1. From the Product Condition window, select the **Use an attribute based product group** radio button. The Included products and the Excluded product groups sections are displayed.



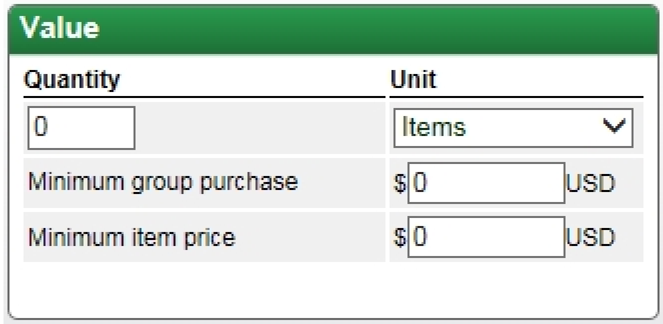
2. In the Included products sections, do the following:
   a. Modify the Product Group Name, when necessary.
   b. Add items from product hierarchies. For more information, refer to *Adding Items from Product Hierarchies for Attribute Product Groups* on page 442.
3. In the Excluded product groups section, highlight a product group name and then, use the **Select** button to exclude the product group from receiving the offer. The product group is displayed in the Excluded groups list box.

   Multiple product groups can be excluded in product conditions, as shown in this example.



Setting Values for Product Conditions

Set the values for product conditions in the Value section of the Product Condition window.



The following table displays the available Units for the product condition value:

Unit	Description	Example
Currency	Permits retailers to reward customers when their purchase reaches a specific amount. For more information, refer to *Value: Currency* on page 230.	A 10% discount is given to customers who purchase meat products worth $500.
Tender type	Permits retailers to reward customers when they purchase a product using a specific tender type as payment. For more information, refer to *Value: Tender Type* on page 231.	A customer's $100.00 transaction qualifies for an offer that rewards 1 point for each dollar spent using a VISA card for at least a minimum payment of $10.00. The customer makes a $50.00 partial payment using a VISA card and then, pays the $50.00 balance with cash. The customer receives 50 points.
Qty 1 at Price	Permits retailers to reward customers when they purchase a product that has the specified price. For more information, refer to *Value: Qty 1 at Price* on page 233.	In celebration of the store's third year anniversary, the retailer provides an offer that rewards a discount of 30% for every item that has a price of $3.00.
Items	Permits retailers to reward customers when they purchase a specific number of items in a transaction. For more information, refer to *Value: Items* on page 234.	An offer rewards a discount of 10% when the customer purchases at least 20 items from the store in a single transaction.

Unit	Description	Example
Unit of Measure	Permits retailers to reward customers when they purchase items that have the specified unit of measure. The units of measure are for the following: • Weight • Volume • Length • Surface Area For more information, refer to *Value: Unit of Measure* on page 235.	An offer rewards a discount of 10% when the customer purchases 10 kilos of rice from the store in a single transaction.

Value: Currency

To set values for product conditions using currency as the unit type, follow these steps:

1. From the Product Condition window, in the Value section, select a currency from the Unit drop–down list. The following options are displayed:

   Example: This procedure uses US Dollars as the currency.

2. In the Price field, specify the amount required to satisfy the condition. The purchase must reach this amount to get the reward.
3. In the Minimum group purchase field, enter the required total minimum amount of all items purchased from the selected product group to satisfy the condition.

   Example: If $20 is the minimum group purchase, all items from the selected product group must have a total of at least $20.

4. In the Minimum item price field, enter the required minimum item price of all items purchased from the selected product group to satisfy the condition.

   Example: If $10 is the minimum item price, all items purchased from this product group must be at least $10.

Note: For precision purposes, the values for Price, Minimum group purchase, and Minimum item price can have up to five decimal values. Precision values of currencies are defined in the LogixRT database. To modify or customize these levels, contact an NCR Professional Services Representative.

5. Select **Save**. The application displays the condition details in the Conditions sub–page.

Value: Tender Type

The Tender type field is available only if:

- The Included product group selected is **Any Product**.
- No product group is excluded.
- Unit type is set as currency.

  Example: US Dollars

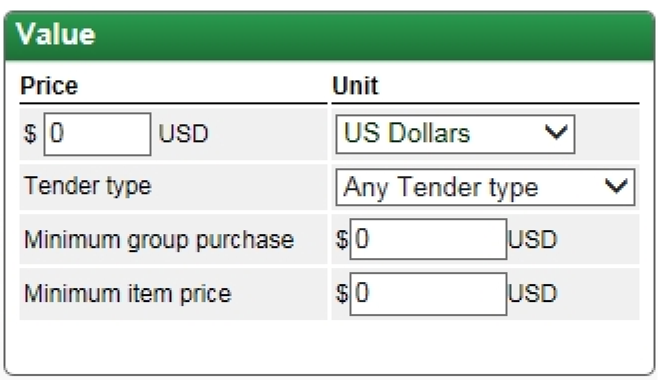
In an offer with multiple product conditions, a Tender type value can be selected only for one product condition, which means no two product conditions can use the same Tender type value. To implement this, the drop–down list does not display Tender type values that are already selected.

If a specific tender type is selected from the Tender Type drop–down list, the Products Pricing Filter drop-down list in the Advanced options section is disabled. If an option is selected from the Products Pricing Filter drop-down list in the Advanced options section, the Tender Type drop-down list is disabled.

Note: The Tender Type feature is also supported in the Offer Templates page. For more information, refer to *Creating Templates* on page 97.

To set values for product conditions using tender types, follow these steps:

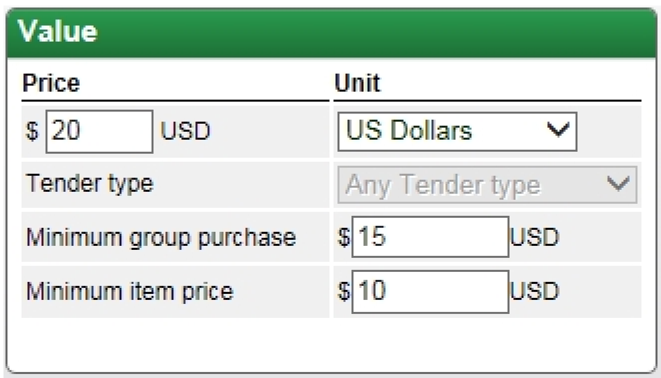
1. From the Product Condition window, in the Value section, select a currency from the Unit drop–down list. The following options are displayed:



2. In the Price field, specify the amount for the tender.

3. From the Tender Type drop–down list, select any of the following:
    - **Any Tender type**. This option permits customer to split the payment with any type of tender. This is the default option.
    - A specific tender type, if available. The Minimum Item Price field and Advanced options section are disabled. To create a tender type, refer to *Creating Tender Types* on page 658.
4. In the Minimum group purchase field, enter the required total minimum amount of all items purchased from the selected product group to satisfy the condition.

    Example: If $20 is the minimum group purchase, all items from the selected product group must have a total of at least $20.
5. In the Minimum item price field, enter the required minimum item price of all items purchased from the selected product group to satisfy the condition. The Tender Type drop–down list is disabled.



Example: If $10 is the minimum item price, all items purchased from this product group must be at least $10.

Note: Please take note of the following:

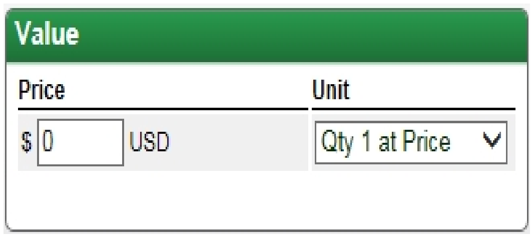
- If an item price is specified in the Minimum Item Price field, the Tender Type drop–down list is disabled.
- Multiple Tender Types are displayed in alphabetical ascending order in the Tender Type list.
- If a specific tender type was selected in the Tender Type list, the Minimum item price field is disabled.
- For precision purposes, the values for Price, Minimum group purchase, and Minimum item price can have up to five decimal values.

6. Select **Save**. The application displays the condition details in the Conditions sub–page.

Value: Qty 1 at Price

To set values for product conditions using the exact price of an item as the unit type, follow these steps:

1. From the Product Condition window, in the Value section, select **Qty 1 at Price** from the Unit drop–down list. The following options are displayed:



2. In the Price field, specify the item price to satisfy the condition.

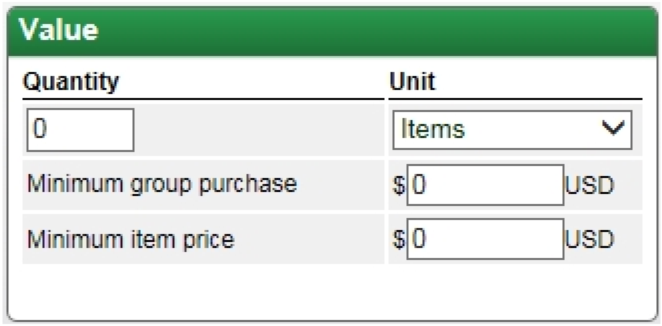
Note: For precision purposes, the value for Price can have up to five decimal values.

3. Select **Save**. The application displays the condition details in the Conditions sub–page.

Value: Items

To set values for product conditions using Items as the unit type, follow these steps:

1. From the Product Condition window, in the Value section, select **Items** from the Unit drop–down list. The following options are displayed:



2. In the Quantity field, enter the minimum number of items that needs to be purchased to satisfy the condition.
3. In the Minimum group purchase field, enter the required total minimum amount of all items purchased from the selected product group to satisfy the condition.

   Example: If $20 is the minimum group purchase, all items from the selected product group must have a total of at least $20.
4. In the Minimum item price field, enter the required minimum item price of all items purchased from the selected product group to satisfy the condition.

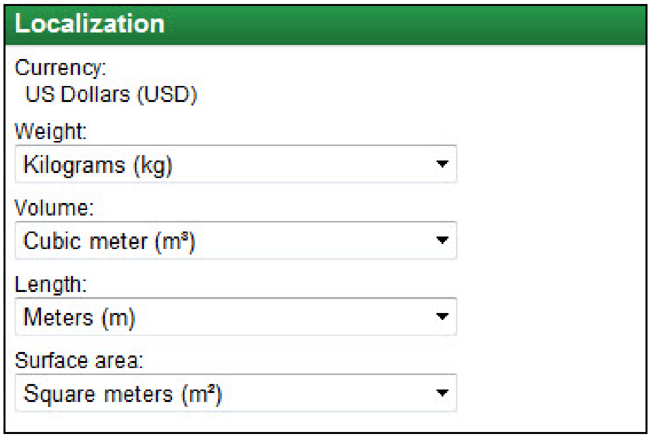
   Example: If $10 is the minimum item price, all items purchased from this product group must be at least $10.

Note: For precision purposes, the values for Minimum group purchase and Minimum item price can have up to five decimal values.

5. Select **Save**. The application displays the condition details in the Conditions sub–page.

Value: Unit of Measure

Before using a unit of measure as the value for a product condition, ensure that the offer has units of measure set for Weight, Volume, Length, and Surface Area in the Localization section of the Offers General page. For more information, refer to Defining Offer Parameters on page 146.



To set quantity values for product conditions using a unit of measure as the unit type, follow these steps:

1. From the Product Condition window, in the Value section, select a unit of measure from the Unit drop–down list. The following options are displayed:

   Example: This procedure uses Weight as the unit of measure. Other options include Volume, Length, and Surface Area.

2. In the Quantity field, enter the minimum weight, volume, length, or surface area that needs to be purchased to satisfy the condition.
3. In the Minimum group purchase field, enter the required total minimum amount of all items purchased from the selected product group to satisfy the condition.

   Example: If $20 is the minimum group purchase, all items from the selected product group must have a total of at least $20.

4. In the Minimum item price field, enter the required minimum item price of all items purchased from the selected product group to satisfy the condition.

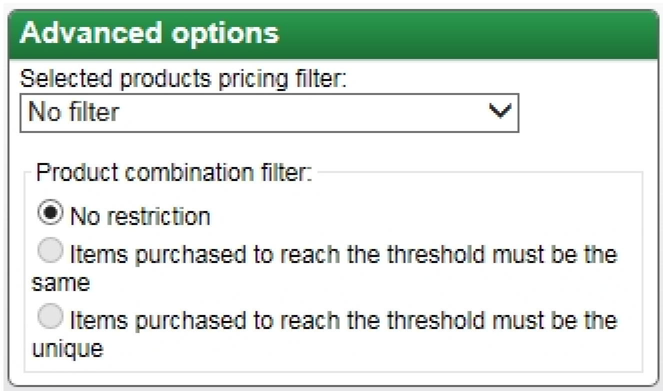
Example: If $10 is the minimum item price, all items purchased from this product group must be at least $10.

Note: For precision purposes, the values for Minimum group purchase and Minimum item price can have up to five decimal values while the value for Quantity can have up to three decimal values.

5. Select **Save**. The application displays the condition details in the Conditions sub–page.

Setting the Advanced options

In the Advanced options section of the Product Condition window, select the products pricing filter and the product combination filter.



Selecting the Products Pricing Filter

The following list displays the available pricing filters:

- **No filter**—if this filter is selected, all the products in the selected product group are considered for the offer.
- **Clearance Levels**—refers to filters that determine which items are considered for the offer:
  - **Full Price**—only non–clearance items that do not have any discount in the transaction are considered for the offer.
  - **Not on Clearance**—only non–clearance items are considered for the offer. Clearance items are not considered.
  - **Any Clearance Level**—clearance items of any level are considered for the offer.
  - **Clearance Levels (1...3)**—only the items with the selected clearance level are considered for the offer.

Note: If a specific tender type is selected from the Tender Type drop–down list of the Value section, the products pricing filter drop-down list in the Advanced options section is disabled. If an option is selected from the products pricing filter drop-down list, the Tender Type drop-down list in the Value section is disabled.

Selecting the Product Combination Filter

The following list displays the available product combination filters:

- **No restriction**—if this filter is selected, all the products in the product group are considered for the offer.
- **Items purchased to reach the threshold must be the same**—if this filter is selected, the items purchased must all have the **same** product code (UPC) to reach the product condition threshold.

  Example: Three items from a product group are required to satisfy the condition. If this filter is selected, the condition is met only if the customer purchases 3 same items from the product group.
- **Items purchased to reach the threshold must be unique**—if this filter is selected, the items purchased must all have **different** product codes (UPCs) to reach the product condition threshold.

  Example: Five items from the selected product groups, Vegetables and Fruits, are required to satisfy the condition. If this filter is selected, the condition is met only if the customer purchases 5 different items from the product groups.

Note: The *Items purchased to reach the threshold must be the same* and the *Items purchased to reach the threshold must be unique* options are enabled only if the selected value for the product condition is **Items**.

Creating Multiple Product Conditions

Retailers can add multiple product conditions to a single offer. These product conditions must be classified as either *And* or *Or* product conditions to determine how they are considered for the offer.

- And—the transaction must meet all the product conditions to get the reward.
- Or—the transaction gets the reward if any of the product conditions are met.

Note: If there is only one existing product condition in an offer, the next product condition created is classified as *And* by default, as shown in this example.

Conditions

Delete	And/Or	Type	Details	Information
Customer conditions				
X		Customer	cm cust group	
Product conditions				
X		Product	cm shopping No Minimum group purchase No Minimum item price	2 required
X	and	Product	atg-clearance1 5.00 Minimum group purchase $1.00 Minimum item price	5 required

To classify product conditions as *Or* conditions, click **and** from any product condition.

Conditions

Delete	And/Or	Type	Details	Information
Customer conditions				
X		Customer	cm cust group	
Product conditions				
X		Product	cm shopping No Minimum group purchase No Minimum item price	2 required
X	and	Product	atg-clearance1 5.00 Minimum group purchase $1.00 Minimum item price	5 required
X	and	Product	atg-clearance3 $6.00 Minimum group purchase $2.00 Minimum item price	5 kg required

The product conditions change to *Or*, as shown in this example.

Conditions

Delete	And/Or	Type	Details	Information
Customer conditions				
X		Customer	cm cust group	
Product conditions				
X		Product	cm shopping No Minimum group purchase No Minimum item price	2 required
X	Or	Product	atg-clearance1 5.00 Minimum group purchase $1.00 Minimum item price	5 required
X	Or	Product	atg-clearance3 $6.00 Minimum group purchase $2.00 Minimum item price	5 kg required

Retailers can create multiple product conditions with one or all of these conditions containing one or multiple excluded product groups, as shown in the following example.

Conditions

Delete	And/Or	Type	Details	Information
Customer conditions				
X		Customer	Any Customer	
Product conditions				
X		Product	All Children's Dresses excluding Children's Dresses-Guess, Children's Dresses-Old Navy No Minimum group purchase No Minimum item price	1 required
X	and	Product	Any Product excluding PG-C, PG-B No Minimum group purchase No Minimum item price	10.000 lbs/gals required
X	and	Product	PG-A excluding PG-D, PG-E No Minimum group purchase No Minimum item price	Qty 1 at Price $15.00

The multiple product conditions that have multiple excluded product groups can be set to *And* or *Or*.

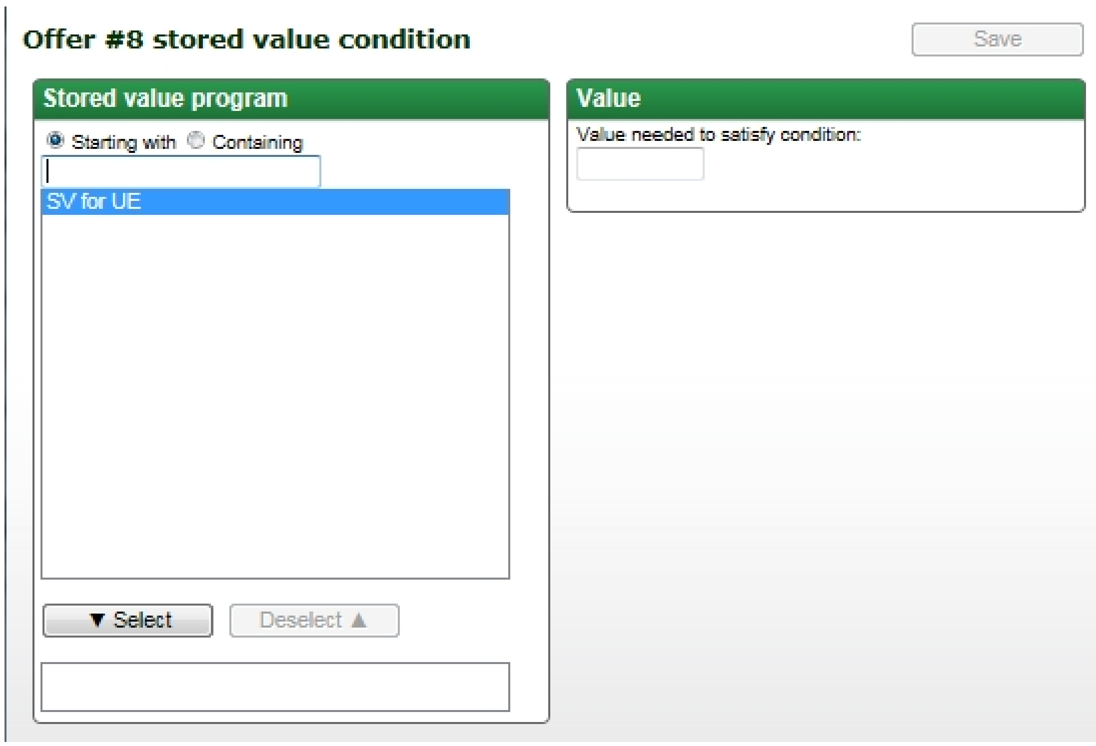
Setting Stored Value Conditions

Stored value conditions are used to trigger an offer when a customer accumulates a certain number of stored value units in a particular program. Before setting stored value conditions, ensure that a stored value program configuration exists in the system. For more information, refer to *Stored Value Programs* on page 495.

To set stored value conditions, follow these steps:

Note: To set this condition, ensure that customer groups eligible to receive the offer are cardholders.

1. Select any offers from the Offers page and then select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.
2. From the Add a condition section, select **Stored Value** from the drop–down list.
3. Select **Add**. The Stored Value Condition window is displayed.

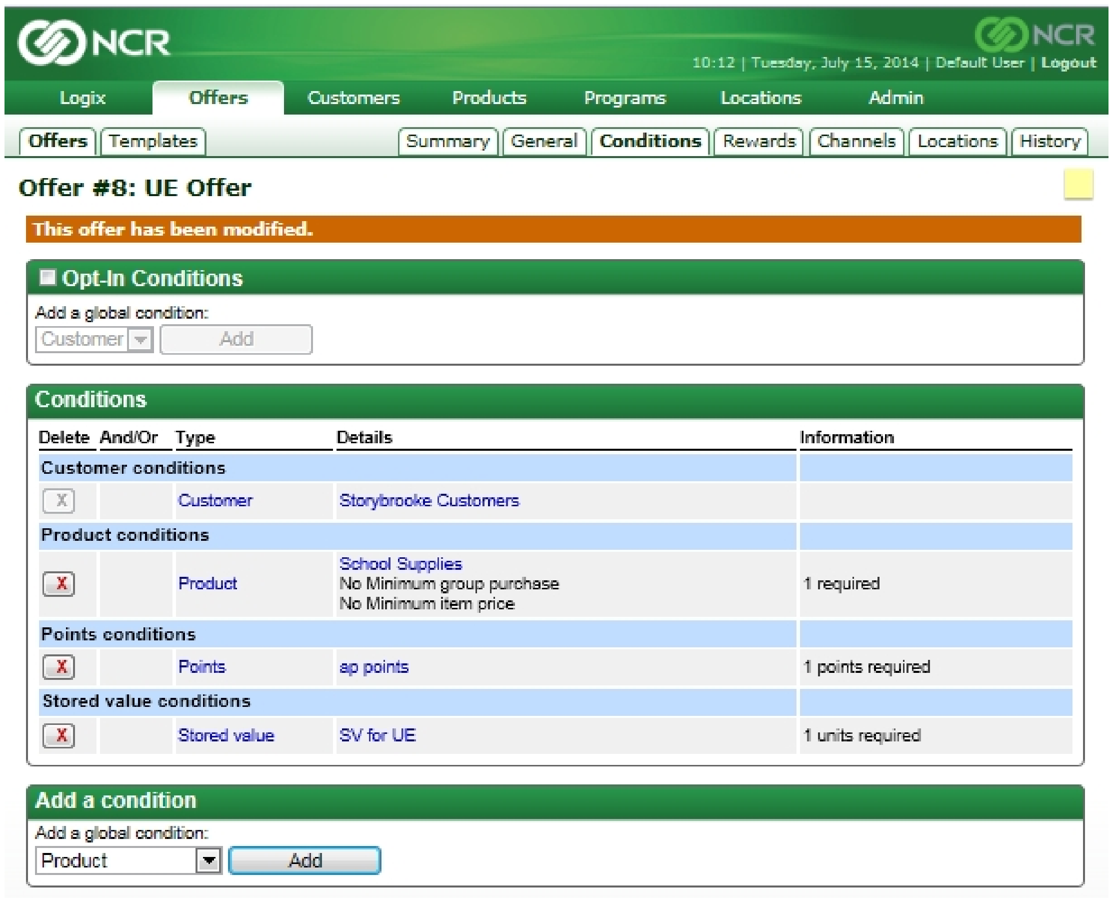


Note: To create a stored value program, refer to *Creating Stored Value Programs* on page 496.

4. Use the following table to set parameters in specific sections:

In the section	Do the following:
Stored Value program	Highlight a stored value program name and then, use the **Select** button to set the stored value program as the condition for the offer to take effect. The stored value program is displayed in the bottom text box.
Value	Enter the value of the stored value units that must be accumulated in order to meet the condition.

5. Select **Save**. The application displays the stored value condition details in the Offer Conditions sub–page.



Setting Tender Conditions

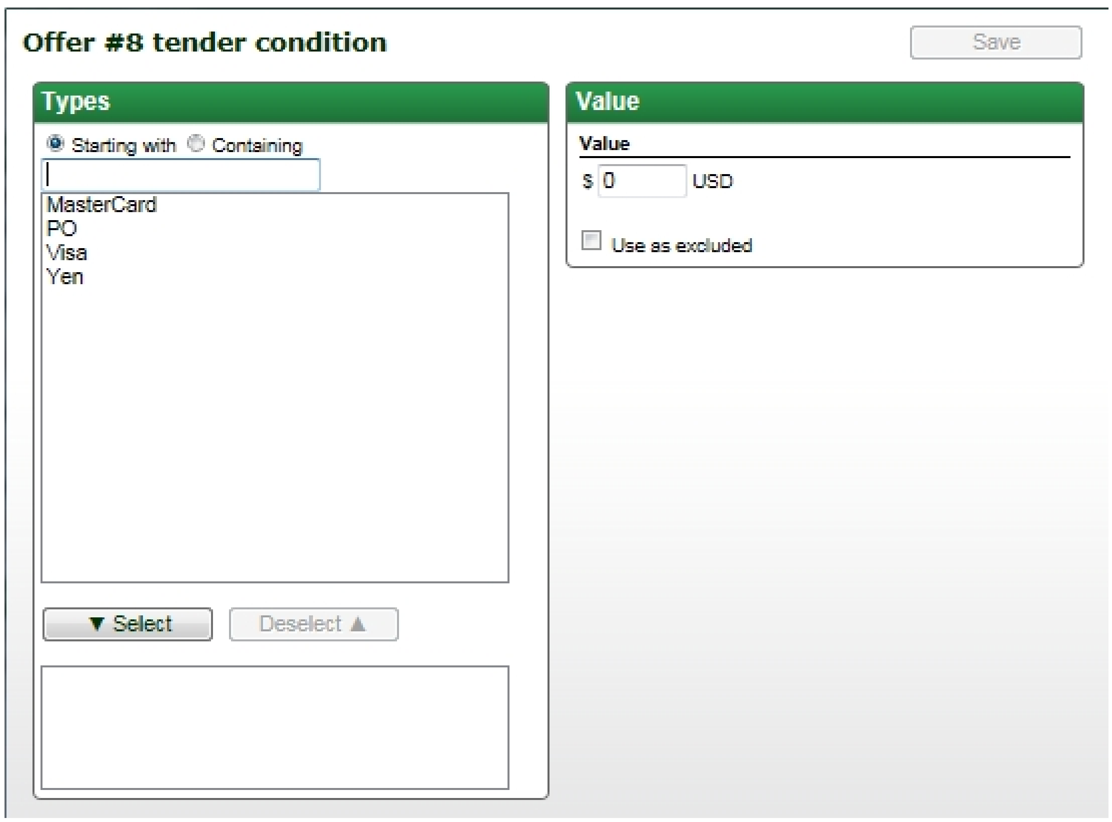
Before setting tender conditions, ensure that a tender type configuration exists in the system. For more information, refer to *Tender Types* on page 657.

To set tender conditions, follow these steps:

1. Select any offers from the Offers page and then select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.
2. From the Add a condition section, select **Tender** from the drop–down list.

Note: To display the Tender condition in the drop–down list, ensure that a tender type is configured in Logix. For more information, refer to *Creating Tender Types* on page 658.

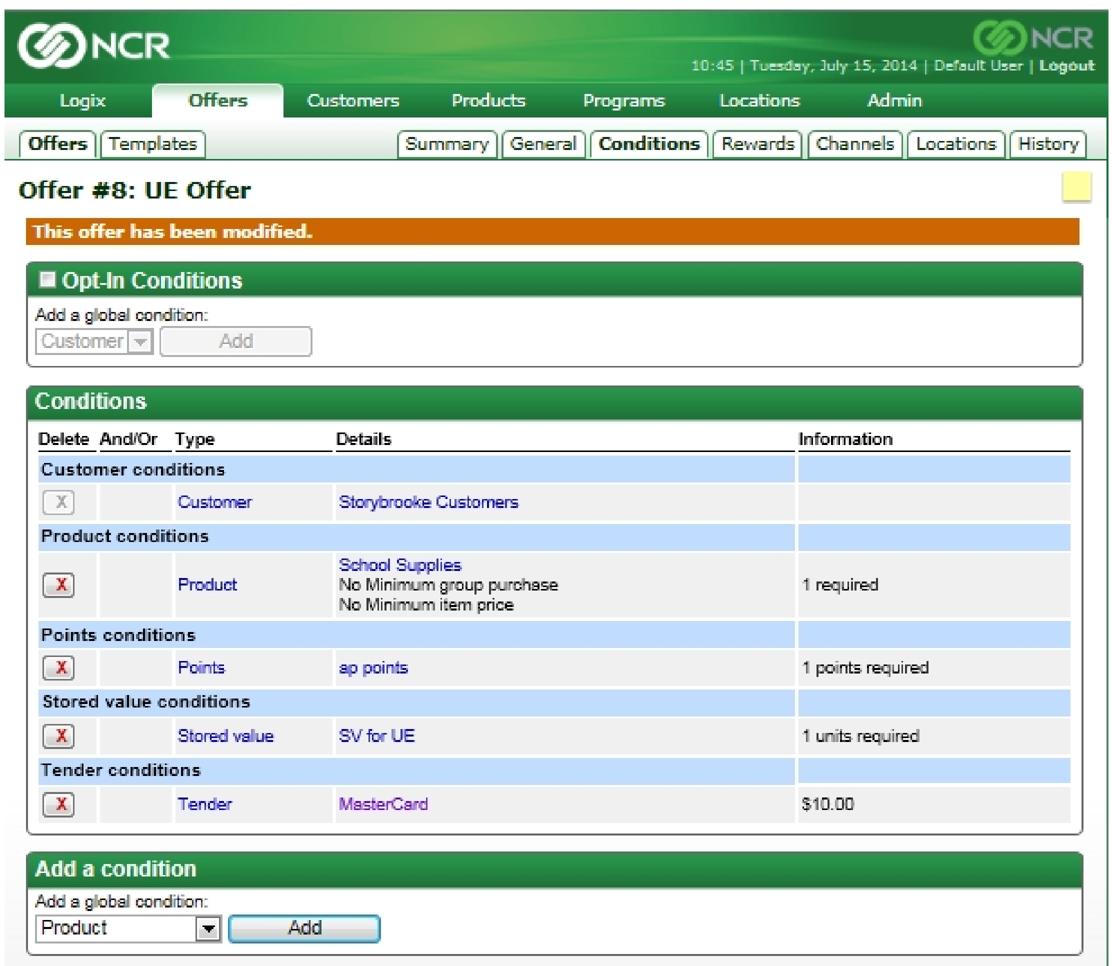
3. Select **Add**. The Tender Condition window is displayed.



4. Use the following table to set parameters in specific sections:

In the section	Do the following:
Types	Highlight a tender type name and then, use the **Select** button to set the tender type as the condition for the offer to take effect. The tender type is displayed in the bottom text box.
Value	Enter the value for the selected tender type. This is the minimum value of the tender type that a customer must spend to be eiligible to receive the offer. **Note:** Select the **Use as excluded** check box to indicate that the condition should allow all forms of tender except for those selected. **Note:** The value can have up to five decimal values for precision purposes.

5. Select **Save**. The application displays the tender condition details in the Offer Conditions sub–page.

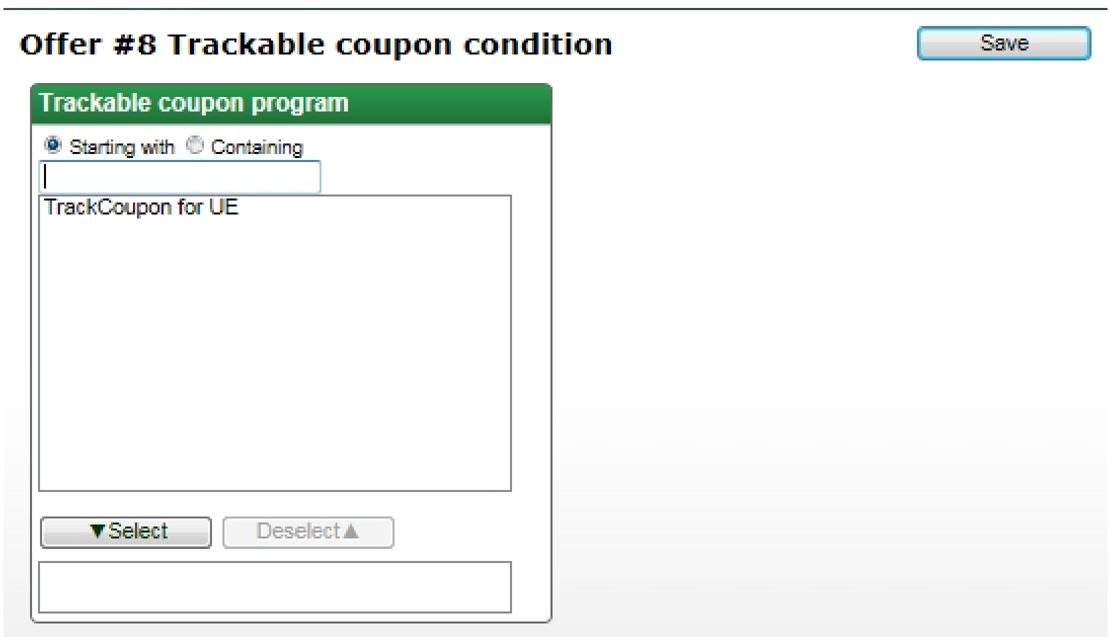


Setting Trackable Coupon Conditions

Trackable coupon conditions are used to associate the offer with a trackable coupon program that limits the number of times a particular coupon can be used within the offer. Before setting trackable coupon conditions, ensure that a trackable coupon configuration exists in the system. For more information, refer to *Trackable Coupon Programs* on page 503.

To set trackable coupon conditions, follow these steps:

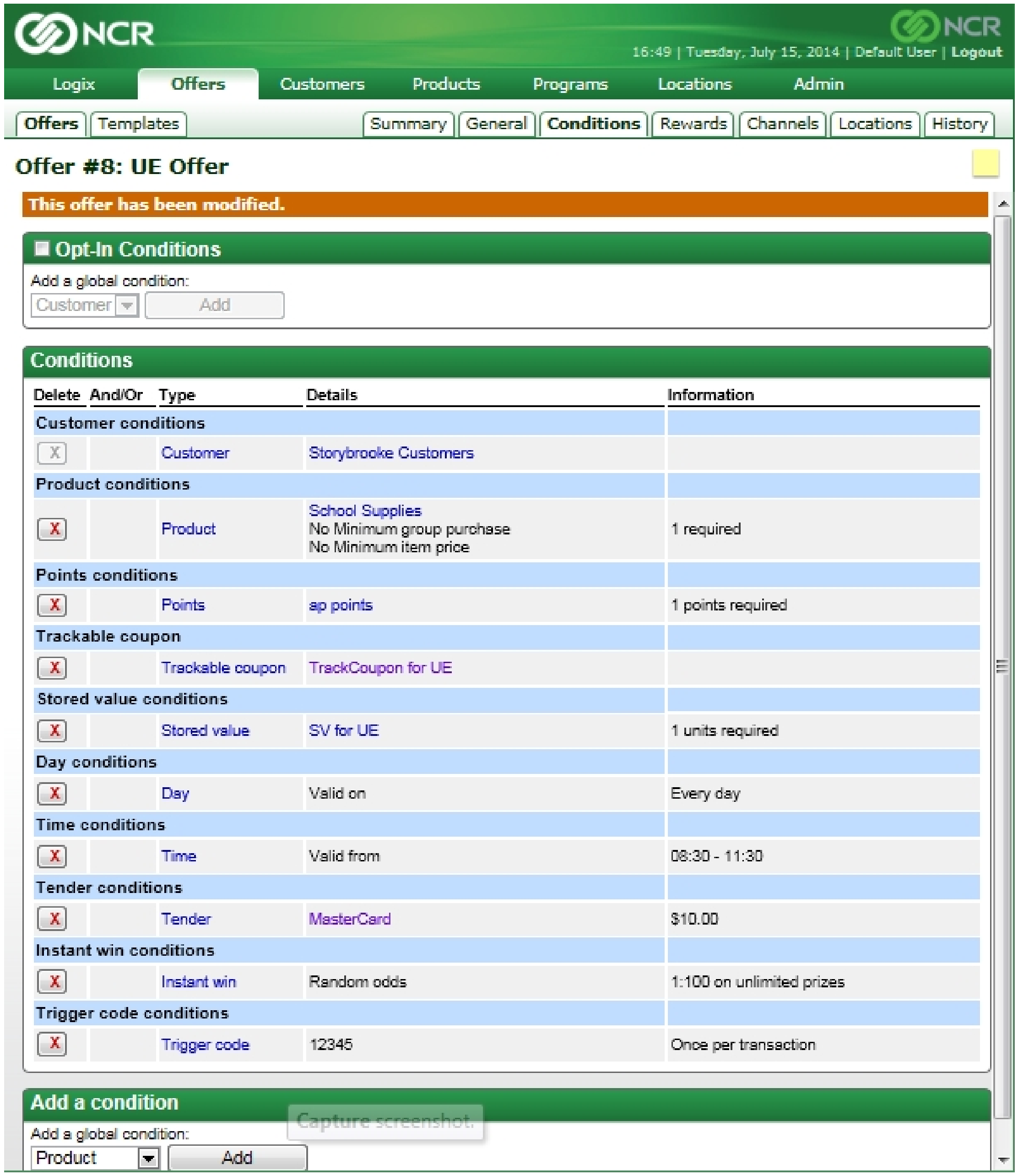
1. Select any offers from the Offers page and then select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.
2. From the Add a condition section, select **Trackable coupon** from the drop–down list.
3. Select **Add**. The Trackable Coupon Condition window is displayed.



Note: To create Trackable Coupon programs, refer to *Creating Trackable Coupon Programs* on page 504.

4. Highlight a Trackable coupon program and then, use the **Select** button to set the trackable coupon program as the condition for the offer to take effect.

5. Select **Save**. The application displays the trackable coupon condition details in the Offer Conditions sub–page.

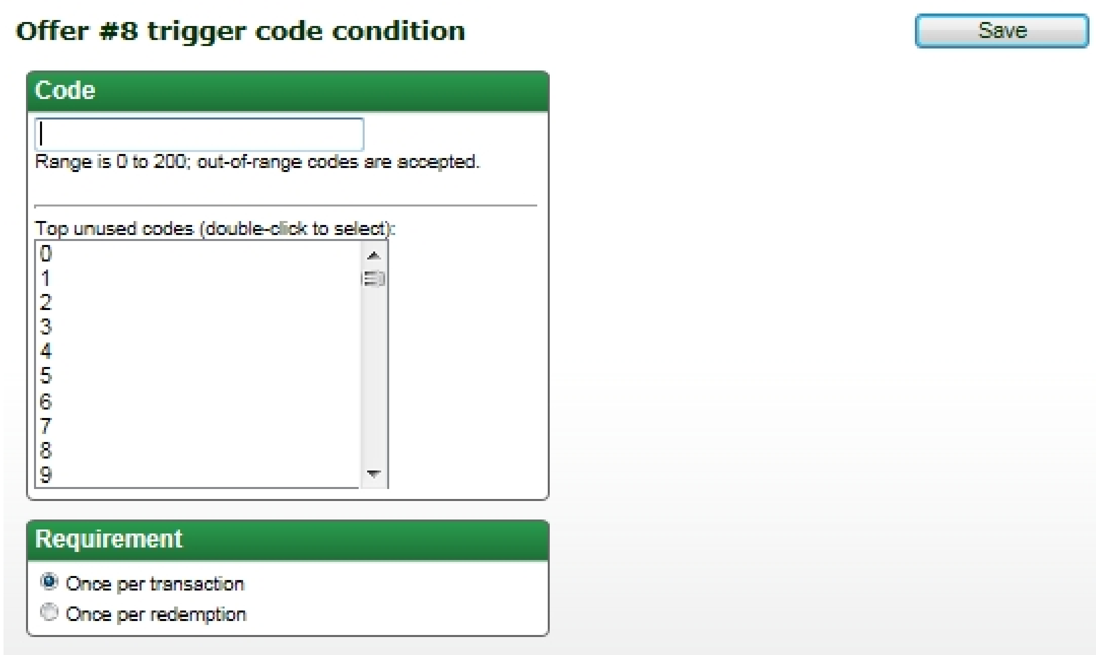


Setting Trigger Code Conditions

Trigger code conditions are used to require a particular code, represented by a UPC, to be scanned during a transaction in order to meet the condition. They also inform cashiers if the code is scanned but the other associated conditions are not met; in this case the application displays a message to return the unused coupon to the customer.

To set trigger code conditions, follow these steps:

1. Select any offers from the Offers page and then select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.
2. From the Add a condition section, select **Trigger code** from the drop–down list.
3. Select **Add**. The Trigger Code Condition window is displayed.



Note: Selecting the **Display cashier message if trigger code is not used** check box specifies whether an unused trigger code notification message is sent either after the End of Sale or at Total.

4. Do any of the following:
   - Enter a code in the Code text box.
   - Double–click a code from the top unused codes list.

Note: To display unused codes, enter values for the Trigger code range options in the Settings page. For more information, refer to *Accessing System Settings* on page 710.

5. Select any of the following Requirement options to determine if the code is required to be presented:

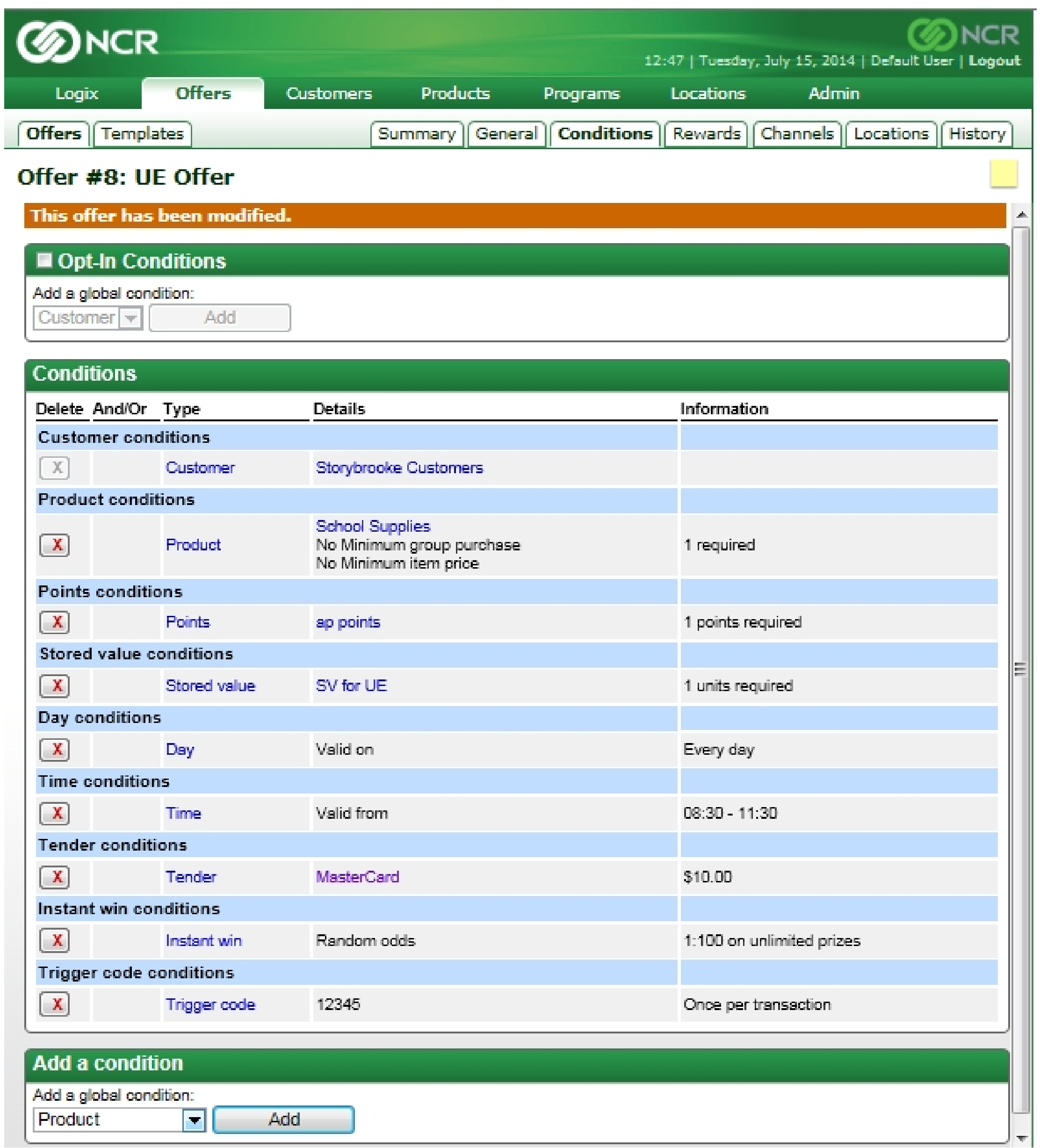
- **Once per transaction**—a qualifying condition that must be satisfied in order for the offer to be earned in multiple instances. The consumer can receive multiple instances of the offer once the qualifying condition has been satisfied.

  Example: A trigger code must be presented once to receive multiple instances of the offer.

- **Once per redemption**—a consuming condition that must be satisfied for the offer to be earned for a certain number of instances. The consumer receives one instance of the offer each time the consuming condition is satisfied.

  Example: A trigger code must be presented each time to receive an instance of the offer.

6. Select **Save**. The application displays the trigger code condition details in the Offer Conditions sub–page.



Eligibility Conditions

Eligibility conditions control the customer groups that are eligible to opt–in or opt–out of an offer shown on an external customer touch point such as a retailer's website. Eligibility conditions are based on the following condition types:

- Customer Conditions
- Points Conditions
- Stored Value Conditions

Customer Eligibility Condition Dependencies

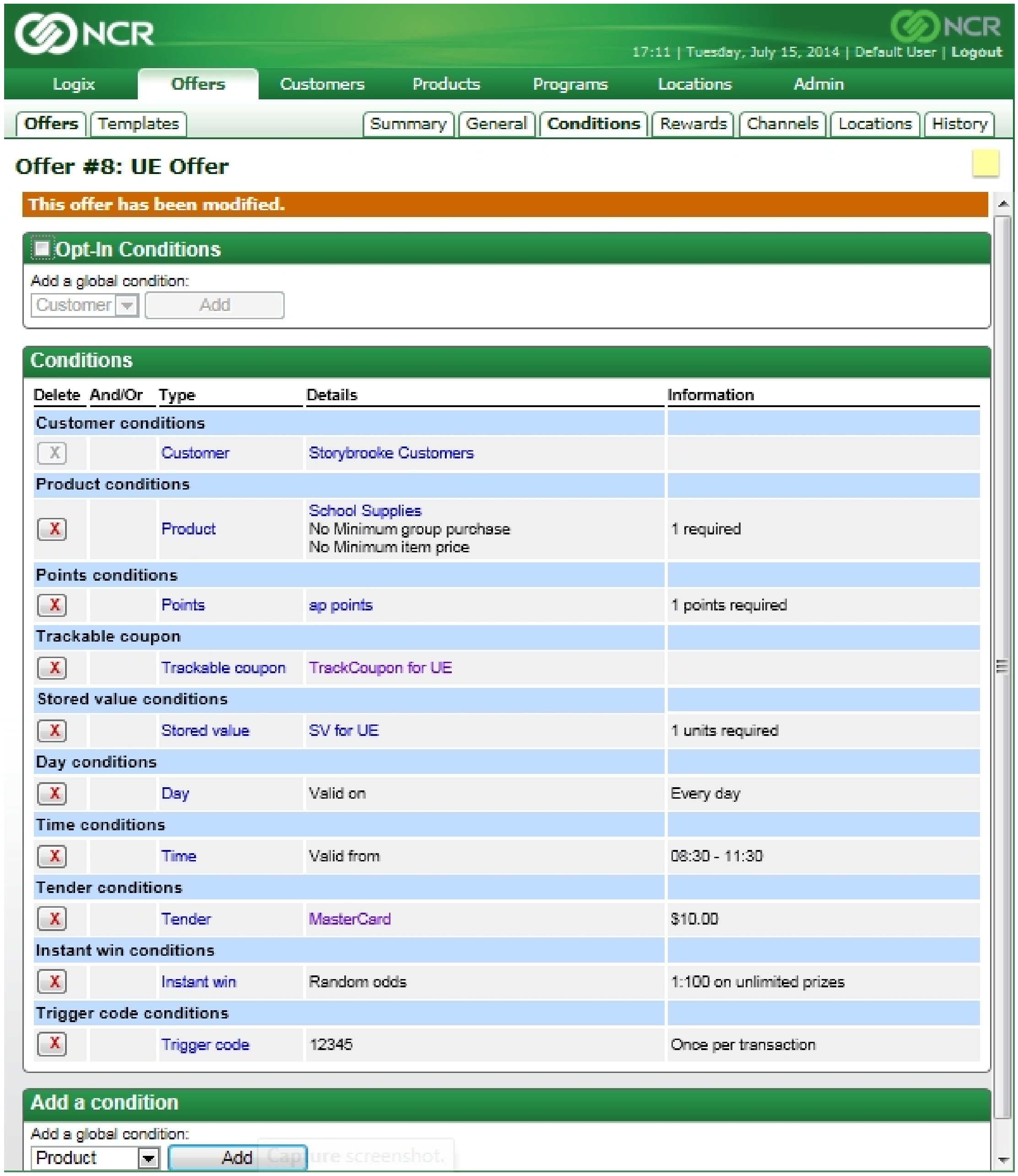
The Customer Eligibility Condition is dependent on the types of customers:

Customer Type	Description
Excluded Customers	Customers who are not eligible to opt–in on an offer even if they are part of the Eligible Customer Group.
Excluded Customer Groups	Customer Groups that were excluded in the Customer Condition. These groups are not available as an option when selecting a Customer Group for Eligible Customer Condition and vice versa.
Any Cardholder	Disables the Opt–in Conditions check box when selected as the Customer Condition when setting Offer Conditions.
Any Customer	Disables the Opt–in Conditions check box when selected as the Customer Condition when setting Offer Conditions.
Existing Customer Conditions	If a Customer Condition already exists for an offer, when a user adds a Customer Opt–in Condition, Logix considers the Default Customer Group and the Existing Customer Group to be linked by an "or" Boolean condition. Thus, a customer needs to be either a member of the Default Customer Group or the Existing Customer Group in order to meet the condition.

Setting Eligible Customer Condition

To set an eligible customer group condition, follow these steps:

1. Select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.

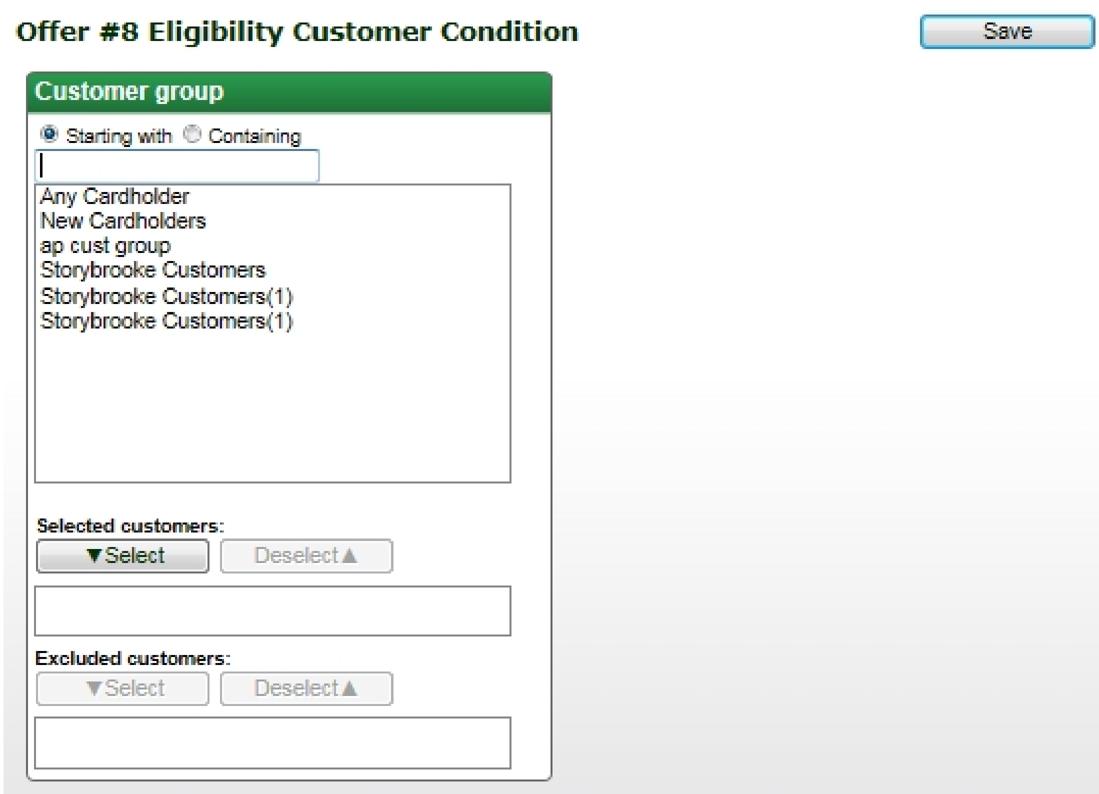


Note: If the Opt–in Conditions check box is disabled, check the Customer Condition. For more information, refer to *Customer Eligibility Condition Dependencies* on the previous page.

2. Select the **Opt–In Conditions** check box. The application enables the Global Condition drop–down list.

Note: By default, only the Customer eligibility condition is available if no eligibility condition is yet configured for the offer. This condition is required before adding any eligibility conditions.

3. Select **Add**. The Eligibility Customer Condition window is displayed.

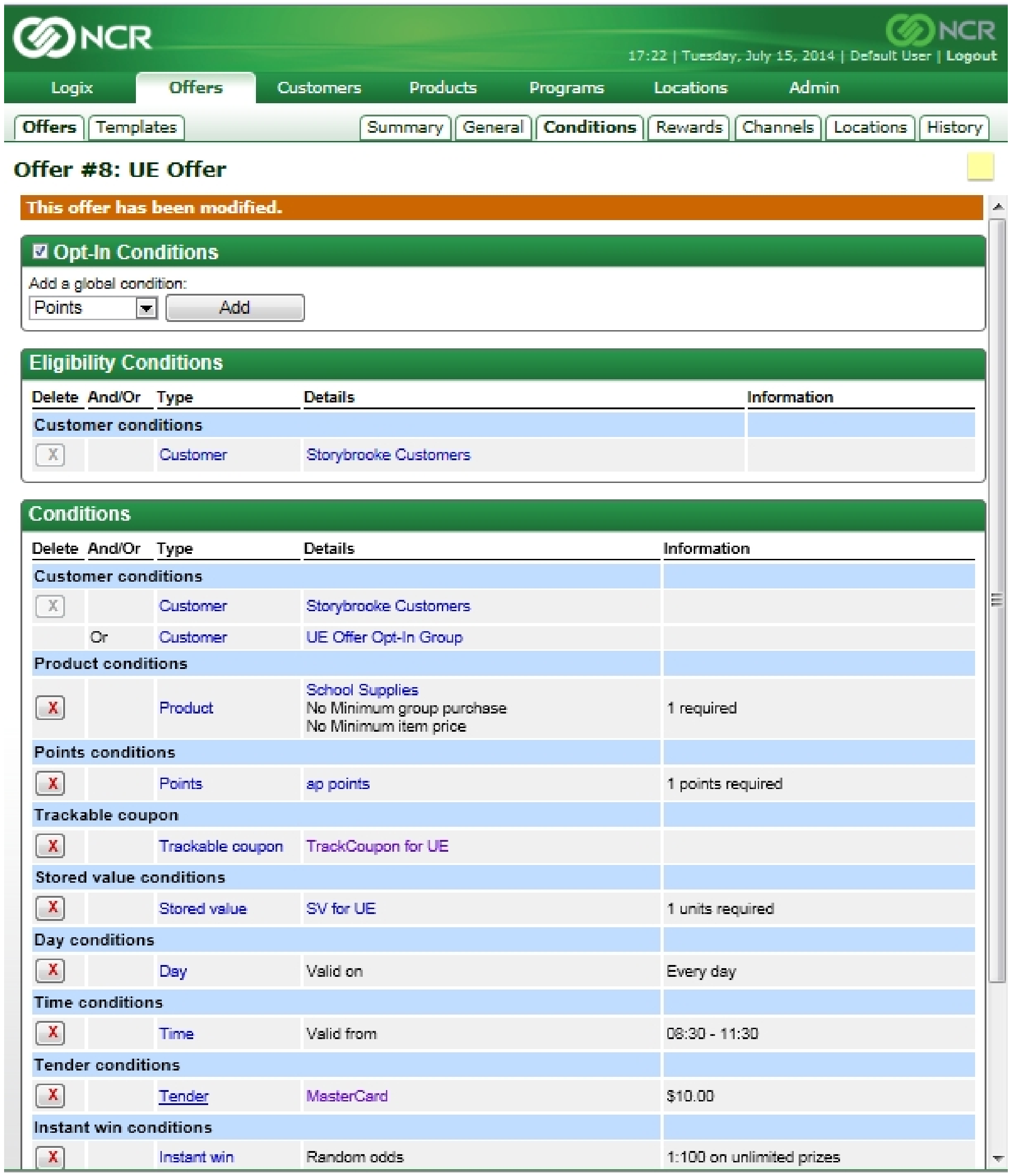


4. Select customer groups that are eligible to opt–in or opt–out of the offer by doing any of the following:
   - Highlight a customer group name and then, use the **Select** button to set the customer group as eligible to view and opt into the offer. The customer group is displayed in the Selected customers text box.
   - Highlight a customer group name and then, use the **Select** button to exclude the customer group from viewing and opting into the offer. The customer group name is displayed in the Excluded customers text box.

Note: For more information on the dependencies of the Eligible Customer Condition, refer to *Customer Eligibility Condition Dependencies* on page 249.

5. Select **Save**. The application displays the the Eligible Customer condition details in the Offer Conditions sub–page.

Note: The Eligibility Customer Condition becomes the Opt–in group associated with the Customer Condition for the offer.



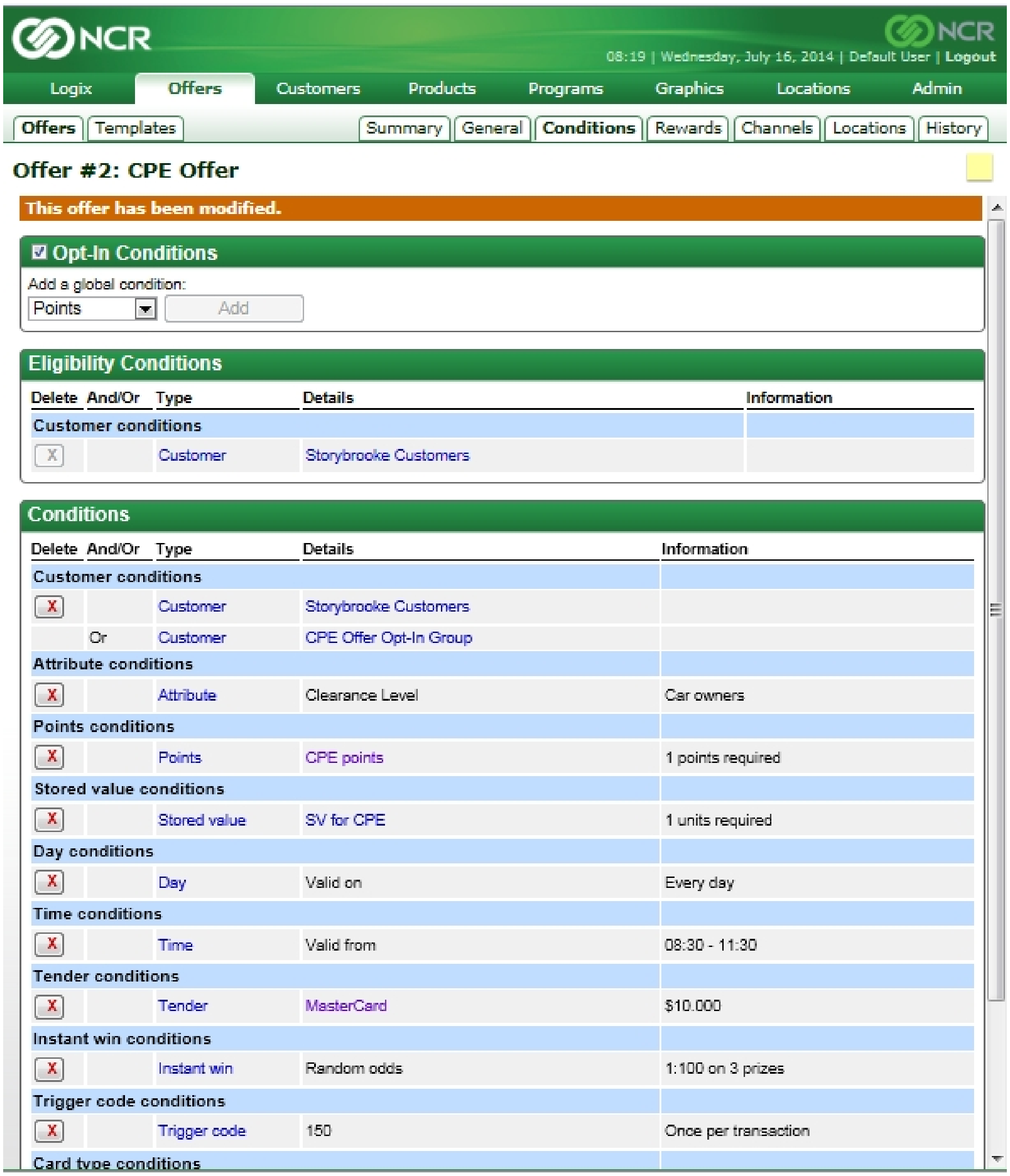
Setting Eligible Points Program

Setting a points program for the Eligibility Condition prompts users to select an Eligible Points Program. An Eligible Points Program condition allows customers who have specific number of points in a Points program to Opt into the offer.

Example: 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.

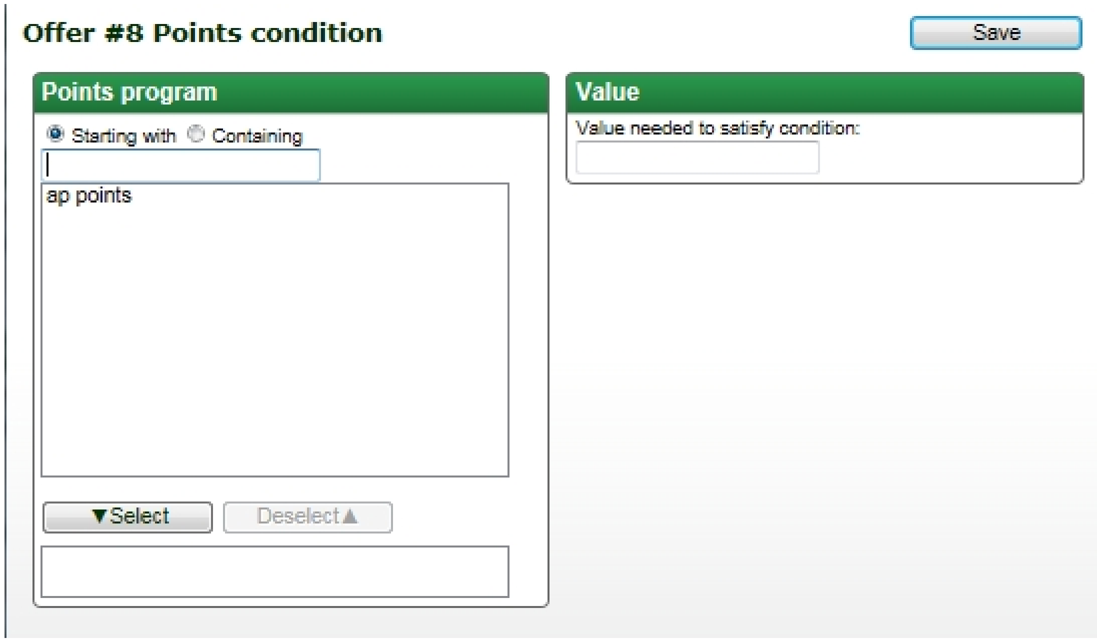
To set eligible points program conditions, follow these steps:

1. Select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.



2. From the Opt–In Conditions section, select **Points** from the drop–down list.

3. Select **Add**. The Points Condition window is displayed.

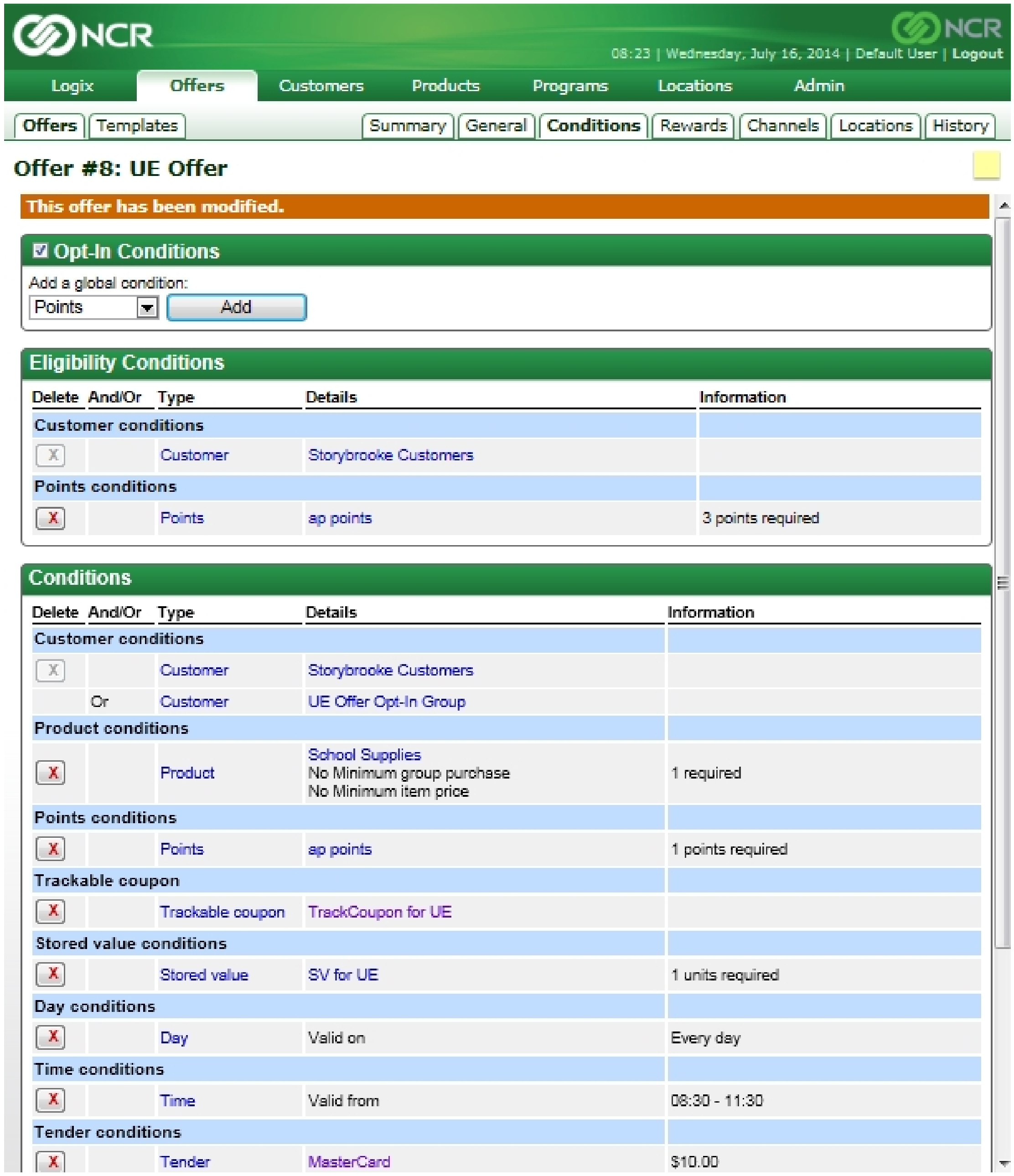


Note: To create a points program, refer to *Creating Points Programs* on page 488.

4. Use the following table to set parameters in specific sections:

In the section	Do the following:
Points program	Highlight a points program name and then, use the **Select** button to set the points program as the condition for the offer to take effect. The points program is displayed in the bottom text box.
Value	Enter the quantity of points that must be accumulated in order to meet the condition.

5. Select **Save**. The application displays the Eligible Points condition details in the Offer Conditions sub–page.



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

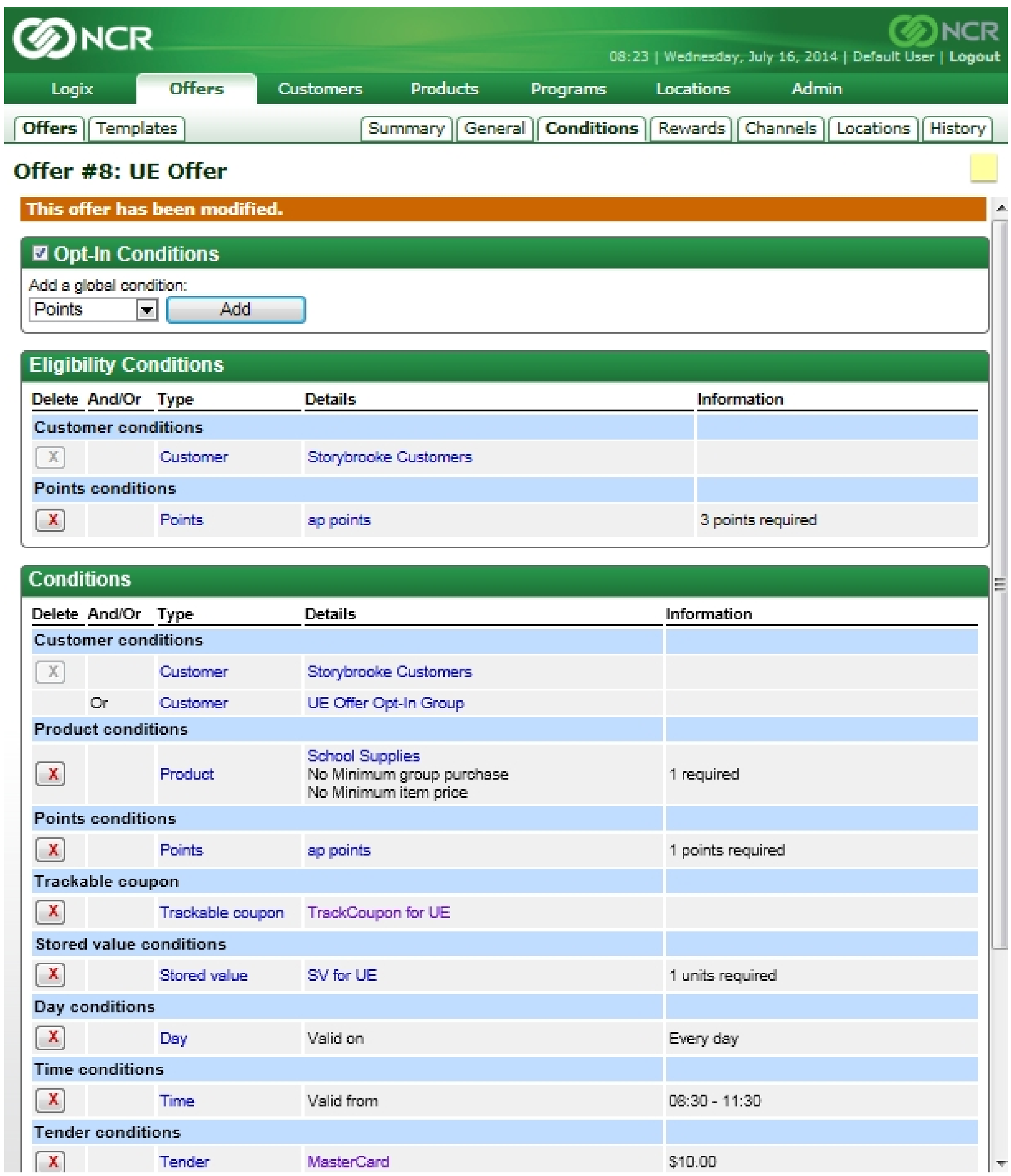
Setting Eligible Stored Value Program

Setting a stored value program for the Eligibility Condition prompts users to select an Eligible Stored Value Program. An Eligible Stored Value Program condition allows customers who have a specific amount of points in a specific Stored Value program to opt into the offer.

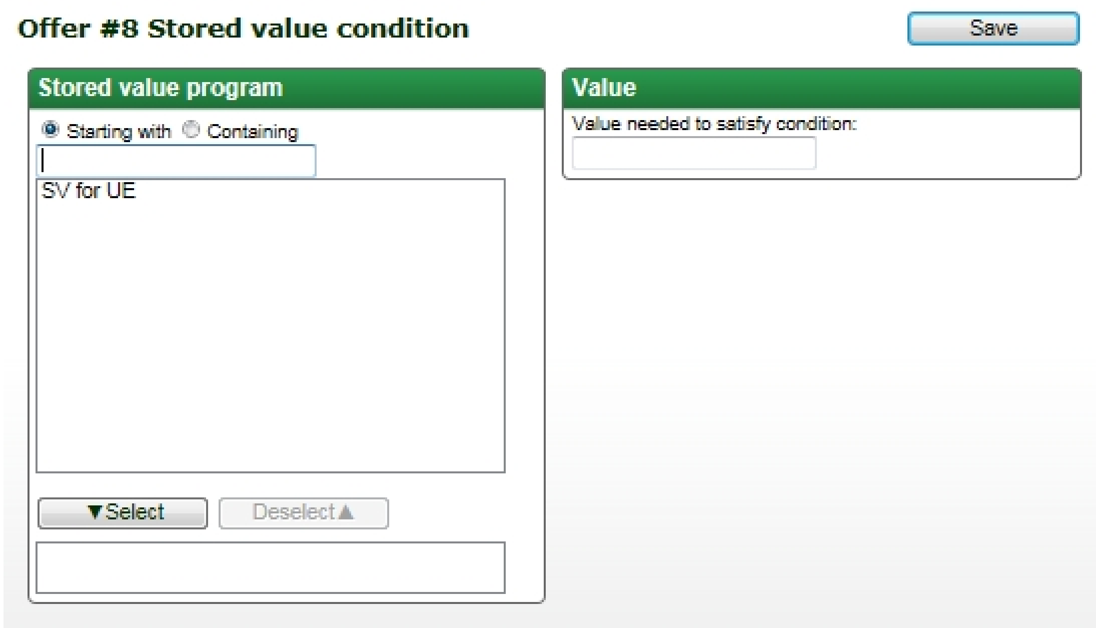
Example: If the Eligible Stored Value Program requires 10 points in Stored Value Program A, then the customer must meet these requirements in order to view and opt into the offer.

To set an eligible stored value program condition, follow these steps:

1. Select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.



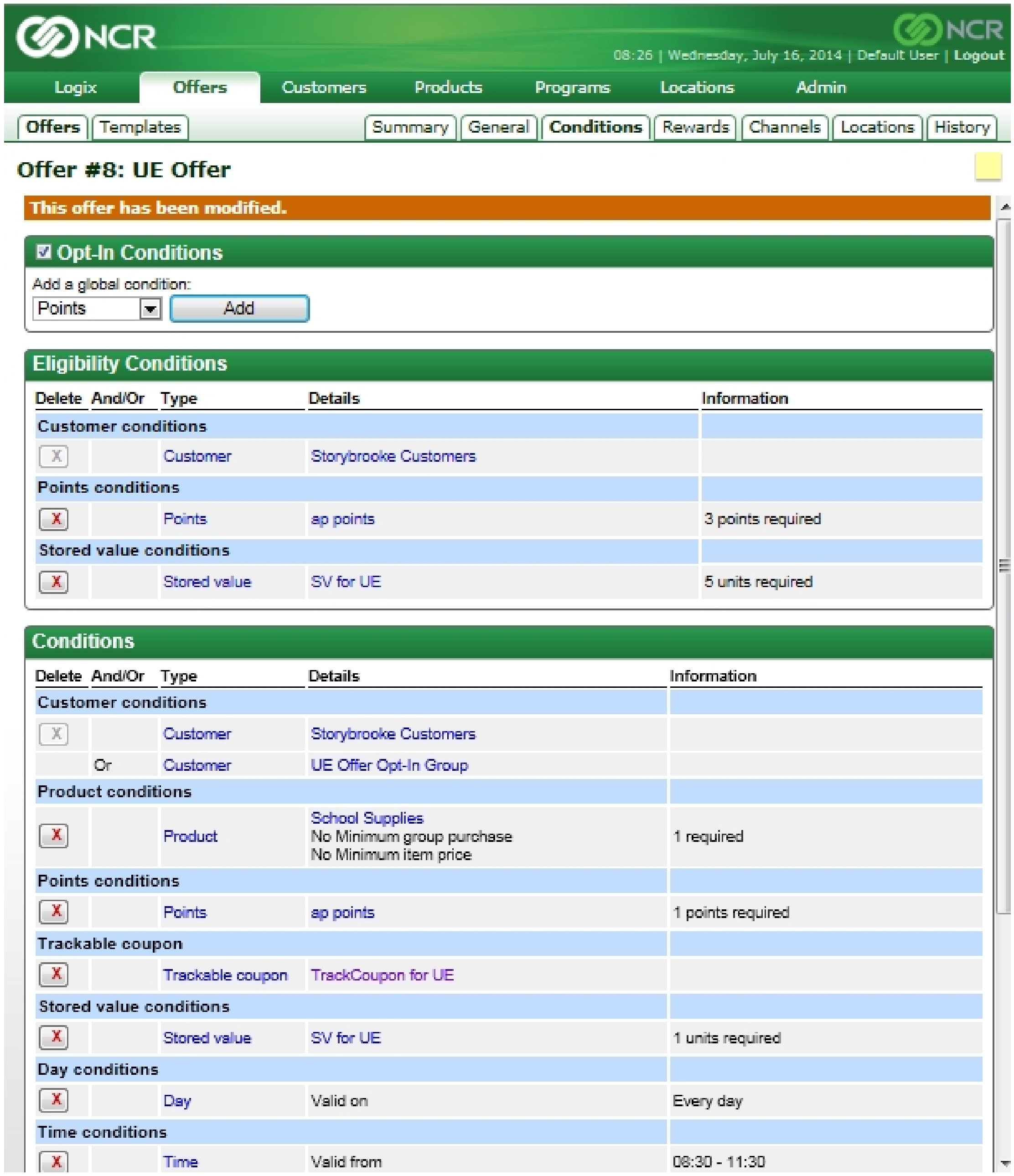
2. From the Opt–In Conditions section, select **Stored value** from the drop–down list.
3. Select **Add**. The Stored Value Condition window is displayed.



4. Use the following table to set parameters in specific sections:

In the section	Do the following:
Stored value program	Highlight a stored value program name and then, use the **Select** button to set the stored value program as the condition for the offer to take effect. The stored value program is displayed in the bottom text box.
Value	Enter the quantity of stored value units that must be accumulated in order to meet the condition.

5. Select **Save**. The application displays the Eligible Stored Value condition details in the Offer Conditions sub–page.

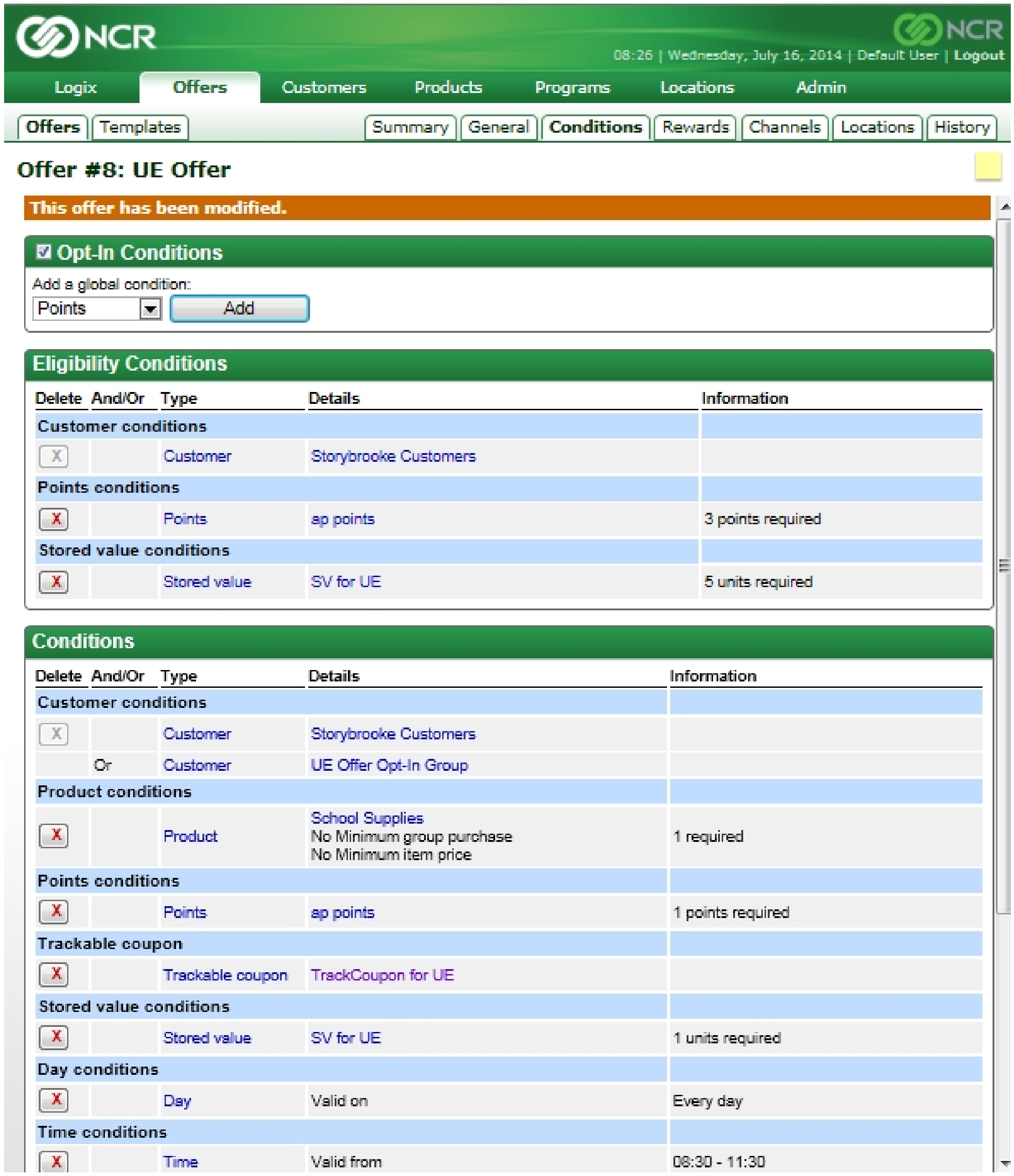


Note: The Customer is not required to have the amount of points defined in the Stored Value Eligibility Condition to satisfy the offer. The Stored Value Eligibility Condition is for Opt–in purposes only.

Removing Eligibility Conditions

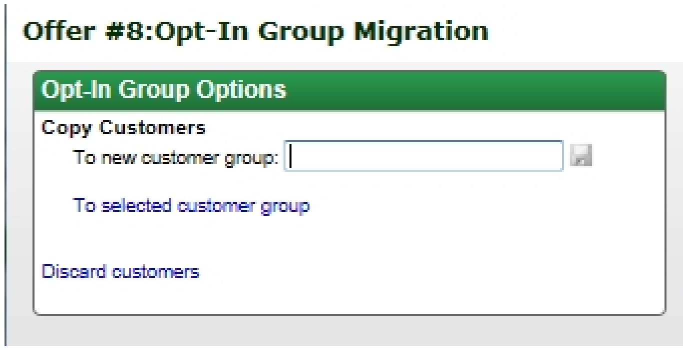
To remove all customers in the Default Customer Group, follow these steps:

1. Select the **Conditions** sub–page tab. The Offer Conditions sub–page is displayed.



Note: To remove the Points and Stored Value Eligibility Condition, select the corresponding **X** button.

2. Deselect the **Opt–In Conditions** check box. The Opt–In Group Migration Options window is displayed.



3. Do any of the following:
   - Enter a new customer group name in the text box and then, select the **disk icon**. The Eligibility conditions are deleted, and the Opt–in group is renamed and becomes one of the Customer Condition for the offer.
   - Select the **To selected customer group** option to copy the customers from the Opt–in Group into an existing Customer Group.
   - Select **Discard Customer Group** to remove the Opt–in group from the Customer Condition for the offer.

Offer Rewards

Rewards are those things that are granted or actions that are performed when offer conditions are met. This section describes the steps in setting the different types of offer rewards. Refer to the following table for a description of offer reward types and their availability in specific promotion engines:

Offer Reward Type	Description
Discount	Grants adjustments to the price of an item or basket based on the selected product group type. For more information, refer to *Discount Reward* on page 263.
Points	Grants customers a specified number of points in a points program. For more information, refer to *Points Reward* on page 302.
Stored Value	Grants customers a certain number of units from a stored value program, each unit of which is associated with a particular value. For more information, refer to *Stored Value Reward* on page 305.
Printed Message	Permits users to enter text that is printed on the customer's receipt. For more information, refer to *Printed Message Reward* on page 308.
Cashier Message	Permits users to enter text that is displayed as a cashier message shown on a pole display or other similar display device. For more information, refer to *Cashier Message Reward* on page 312.
Grant Membership	Permits users to reward customers with membership to a particular customer group. For more information, refer to *Membership Reward* on page 315.
XML Pass–Through	Permits users to set up business rules that allow customers to choose gifts from a list of products when an offer condition is satisfied. For more information, refer to *XML Pass–Through Reward* on page 332.
Gift with purchase	Permits retailers to reward customers with a gift that customers can select from a list of predefined items. For more information, refer to *Gift with Purchase Reward* on page 319.

Offer Reward Type	Description
Purchase with purchase	Permits customers to buy a product at a discounted price by buying several other products. For more information, refer to *Purchase with Purchase Reward* on page 317.
Gift card	Permits retailers to reward customers with a gift card that is loaded with a monetary value. For more information, refer to *Gift Card Rewards* on page 321.
Proximity Message	Permits users to alert customers how much more they need to spend to reach a reward. For more information, refer to *Proximity Message Reward* on page 325.
Monetary Stored Value Redemption	Permits users to add stored value programs from which customers are allowed to redeem as tender. For more information, refer to *Monetary Stored Value Redemption Rewards* on page 329.
Trackable Coupon	Grants customers with dynamically generated unique coupons, which are added to a specified trackable coupon program. For more information, refer to *Trackable Coupon Reward* on page 335.

Discount Reward

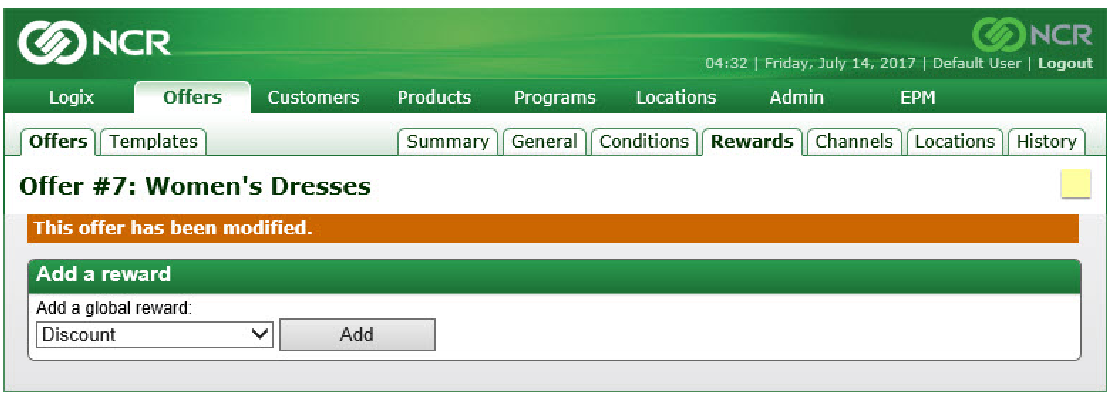
Discount rewards are used to grant adjustments to the price of an item or basket. This section describes each Discount Reward parameter that is displayed in the Discount Reward window depending on the selected discount type.

Example: An offer is set up where the customer receives a specific dollar amount off the defined product group as a discount reward. An example is $2.00 off the Dove soap product group. If the customer purchases one or more Dove soaps, the sale price is $2.00 less from the original price of each Dove soap. Depending on the distribution options set, an item limit and dollar limit may be imposed.

Setting Discount Rewards

Before setting discount rewards, ensure that offer conditions are already configured. To set discount rewards, follow these steps:

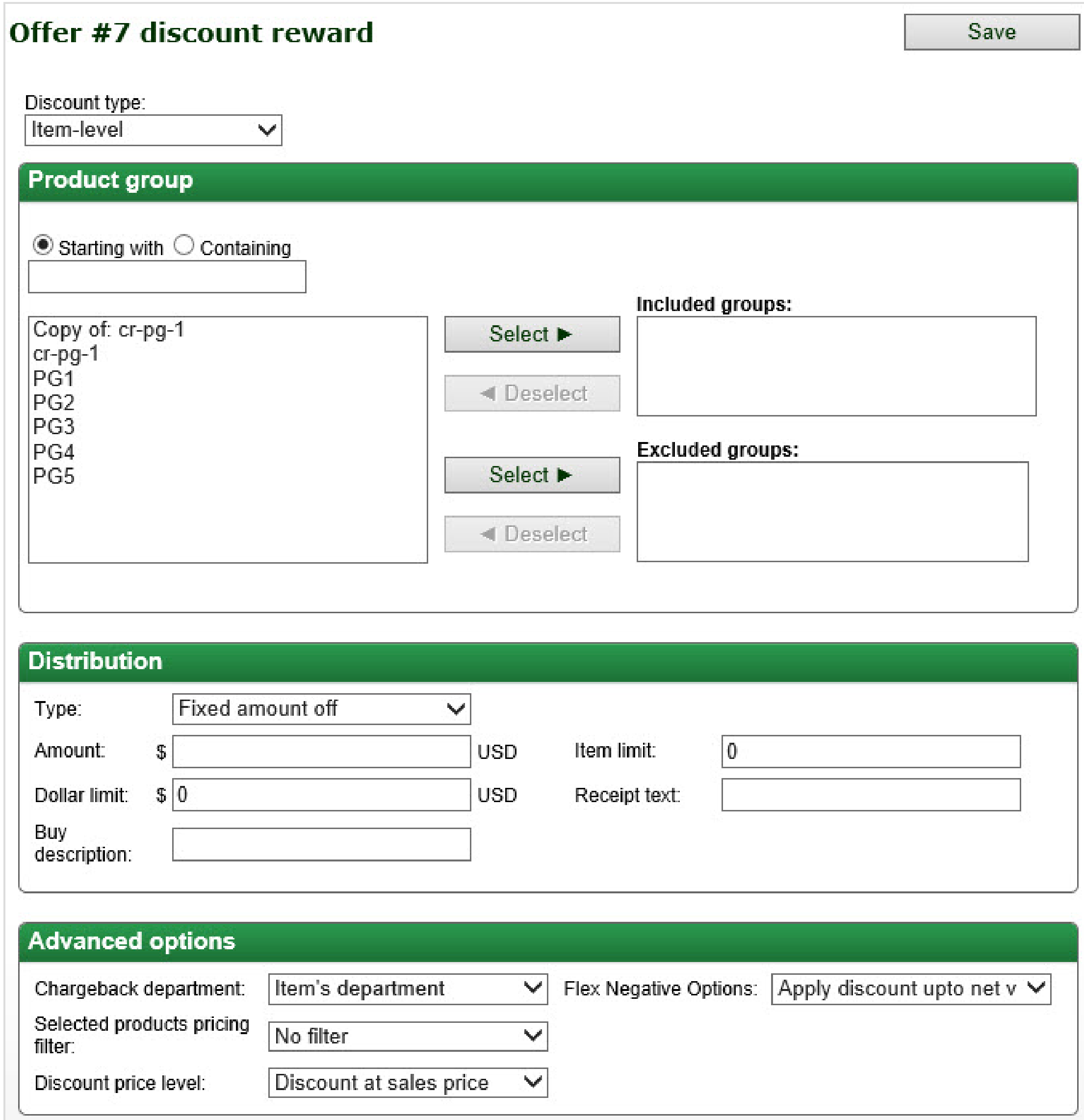
1. Select any offers from the Offers page and then select the **Rewards** sub–page tab. The Offer Rewards sub–page is displayed.



Note: If the Discount reward is disabled, enable the **Allow discounts for offers with tender conditions** option in the UE Settings. For more information, refer to *Accessing UE Settings* on page 729.

2. From the Global Reward drop–down list, select **Discount**.

3. Select **Add**. The Discount Reward window is displayed.



4. Select a discount type from the **Discount type** drop–down list. For more information, refer to *Selecting the Discount Type* on page 267.

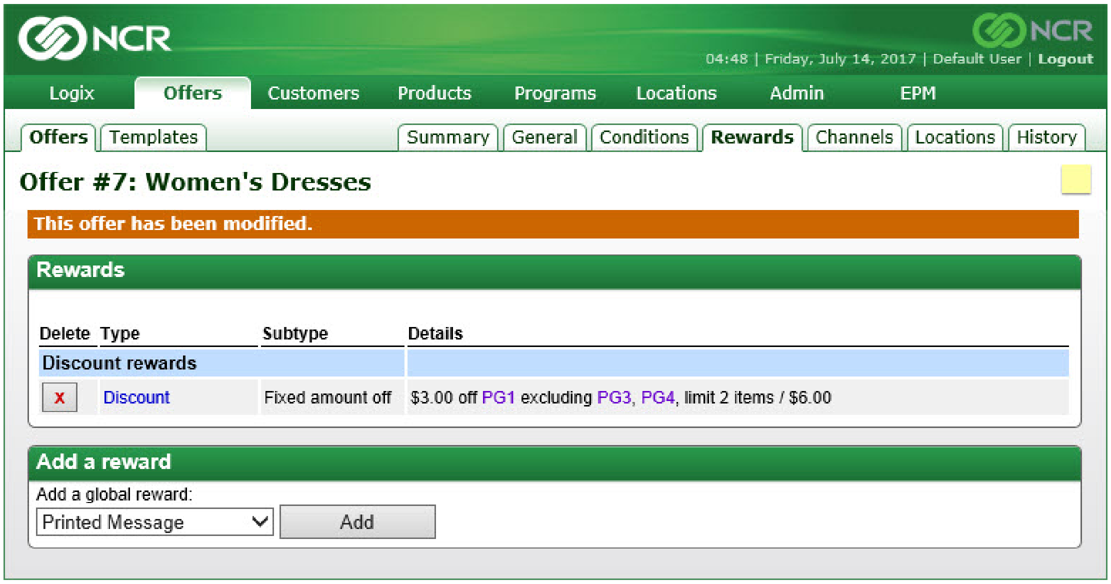
5. Select the **Product Group type**. For more information, refer to *Selecting the Product Group type* on page 278.

6. Select the **Distribution type**. For more information, refer to *Selecting the Distribution type* on page 283.

7. Set the **Advanced options**. For more information, refer to *Setting the Advanced options* on page 298.

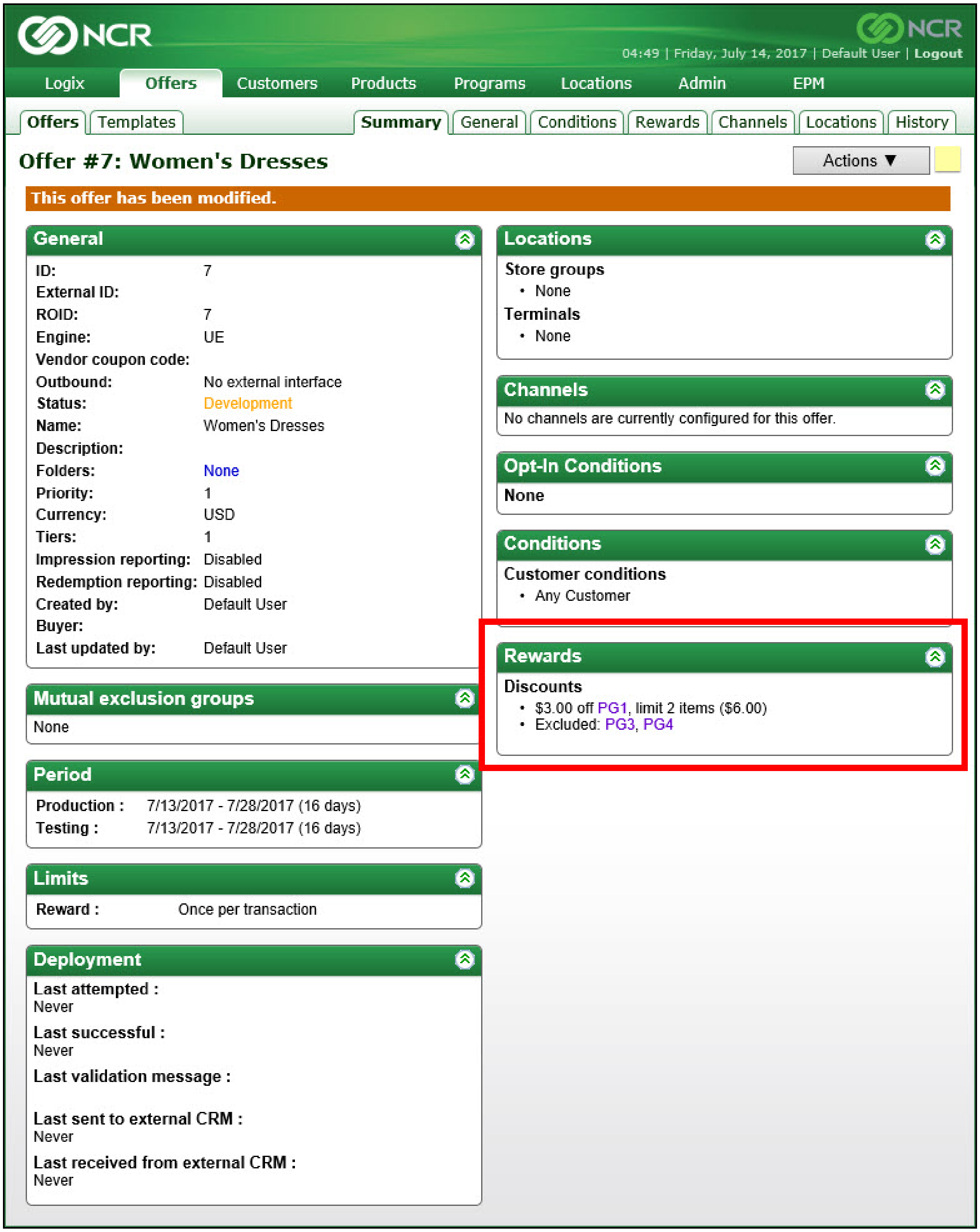
8. Set the Scorecard options. For more information, refer to *Setting the Scorecard options* on page 301.

9. Select **Save**. The application displays the Discount Reward details in the Offer Reward sub–page.



Note: To delete a reward, select the corresponding **X** button.

To view the Offer Summary page after creating the reward, select the **Summary** tab. The created reward is displayed in the Rewards section.



Selecting the Discount Type

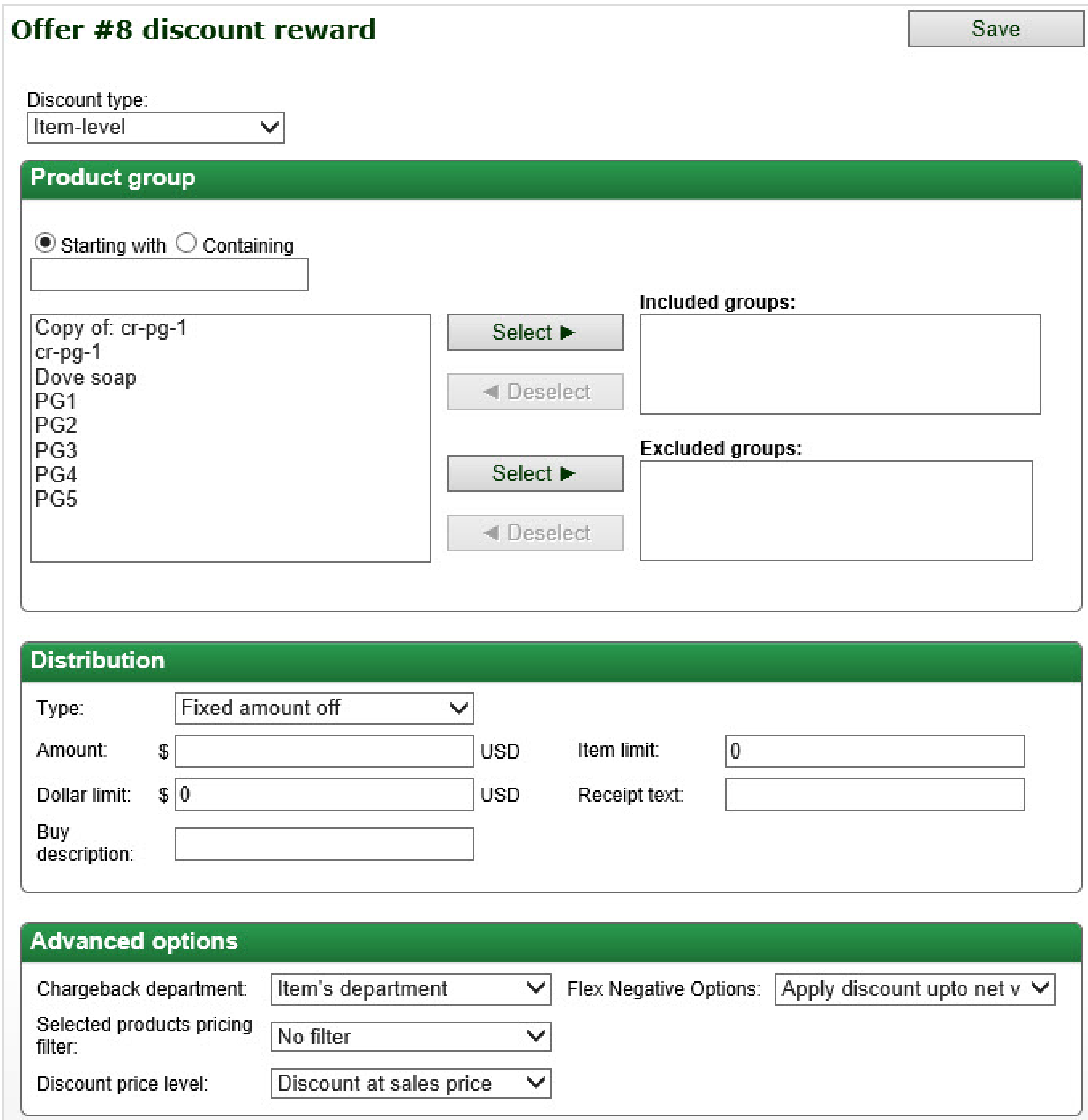
The following table displays the different Discount types that you can select when creating discount rewards:

Discount Type	Description
Item–level	Affects the purchase of individual items.
Department level	Affects the purchase of items from a department.
Basket level	Affects the customer's overall purchase.
Group–level conditional	Affects the overall group purchase of conditional items.
Item–level conditional	Affects the purchase of each conditional item. Used for the following instances: a. If the items being discounted are the same as the items being used for the product condition such as Buy X, Get something from X itself. b. If there are multiple items within the product condition such as Buy A or Buy B.

Note: The Item–level discount type is selected by default in the drop–down list. The Discount Reward window then displays the sections that are specific to creating an Item–level discount type. The sections displayed in the window may vary depending on the selected discount type. For more information, refer to the next sections.

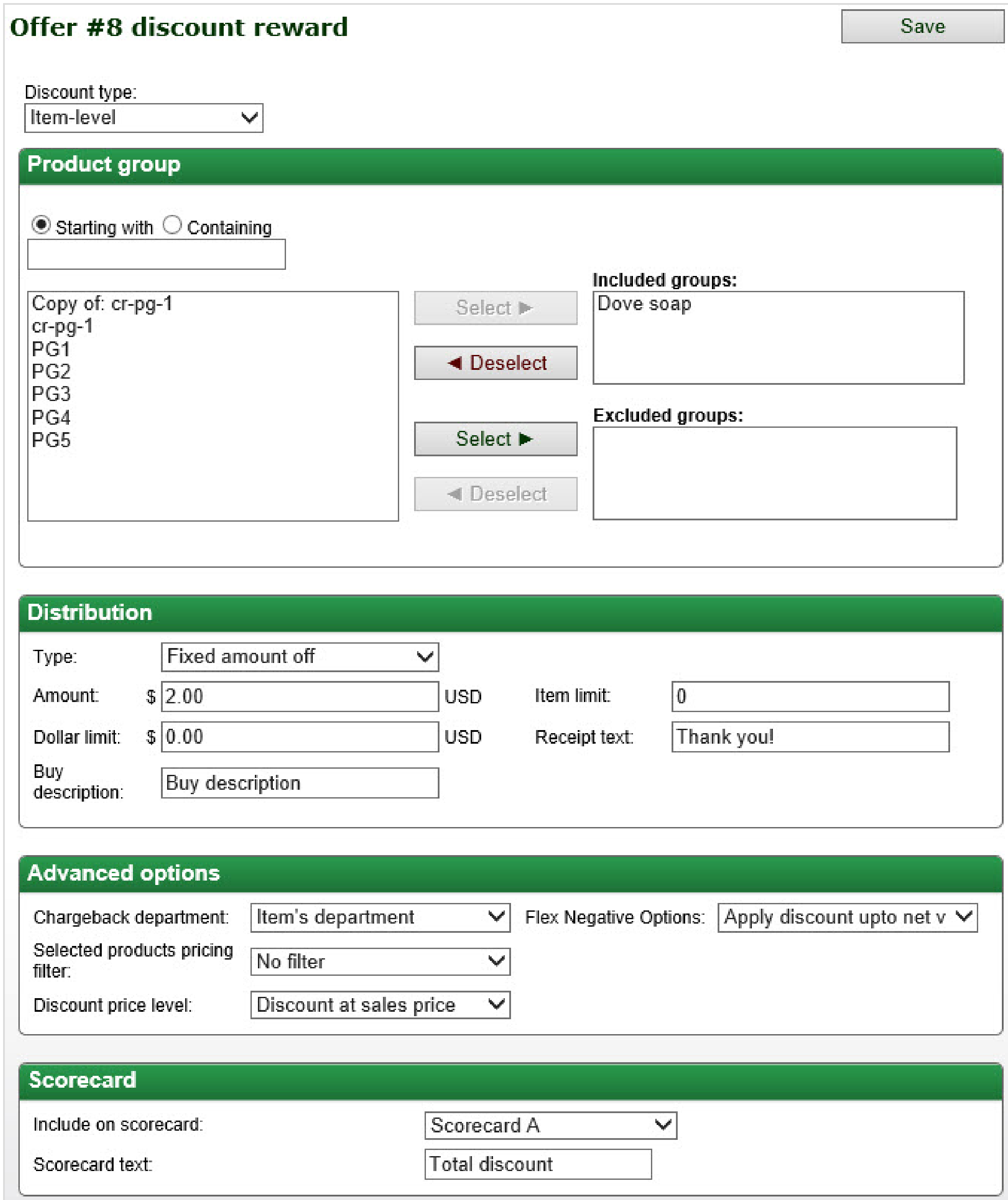
Item–level Discount Type

The Item–level discount type affects the purchase of individual items. Selecting this discount type displays the Product group, Distribution, Advanced options, and Scorecard sections.



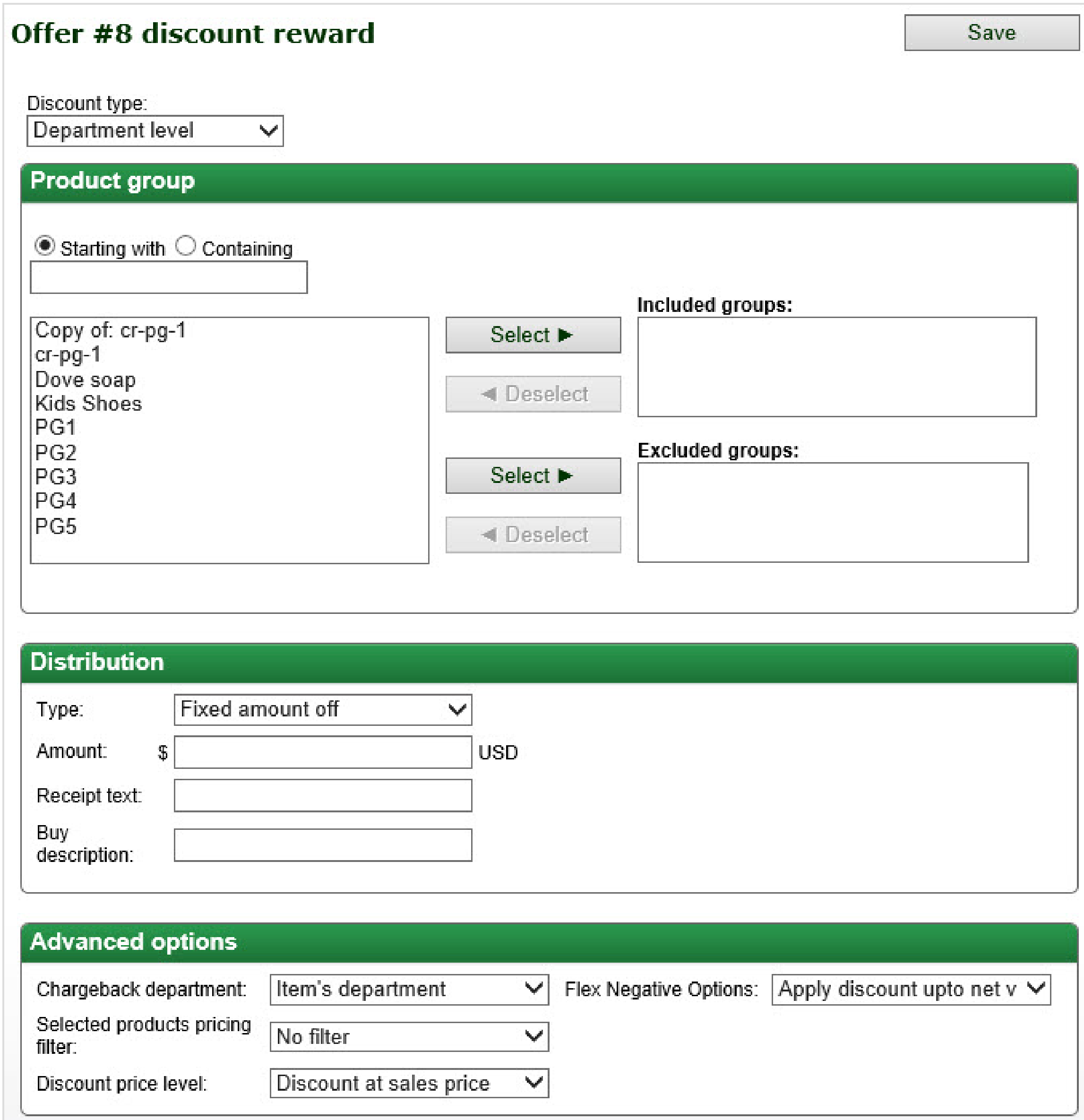
Example: An offer is set up where the customer receives a specific dollar amount off the defined product group. An example is $2.00 off the Dove soap product group. If the customer purchases one or more Dove soaps, the sale price is $2.00 less from the original price of each Dove soap. Depending on the distribution options set, an item limit and dollar limit may be imposed.

In this example, the reward is set as follows:



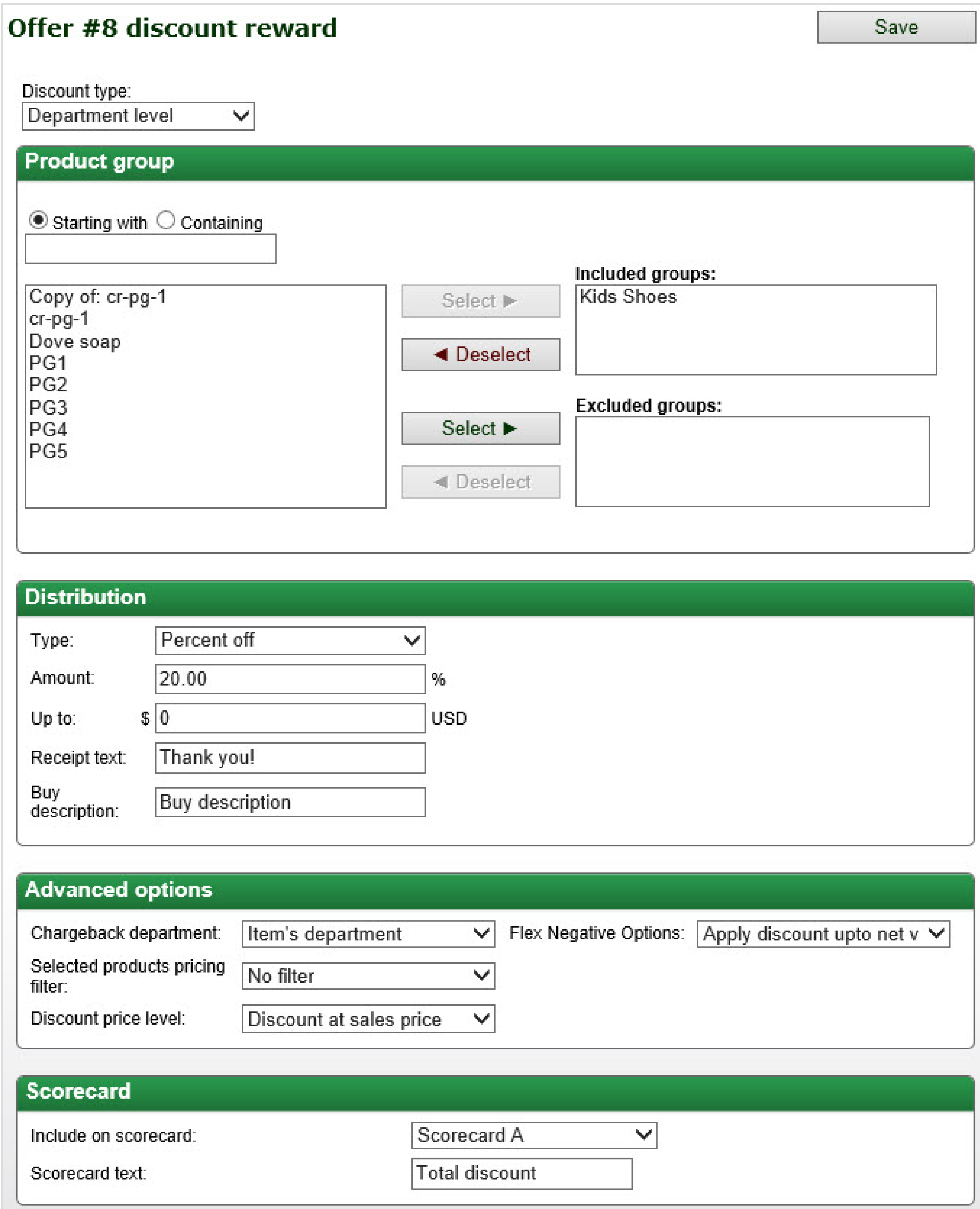
Department–level Discount Type

The Department–level discount type affects the purchase of items from a department. Selecting this discount type displays the Product group, Distribution, Advanced options, and Scorecard sections:



Example: An offer is set up where the customer receives a specific percent off the defined product group. An example is 20% off items from the Kids Shoes product group. If the customer purchases one or more kid's shoes, the sale price is 20% less from the original price of each pair of kid's shoes.

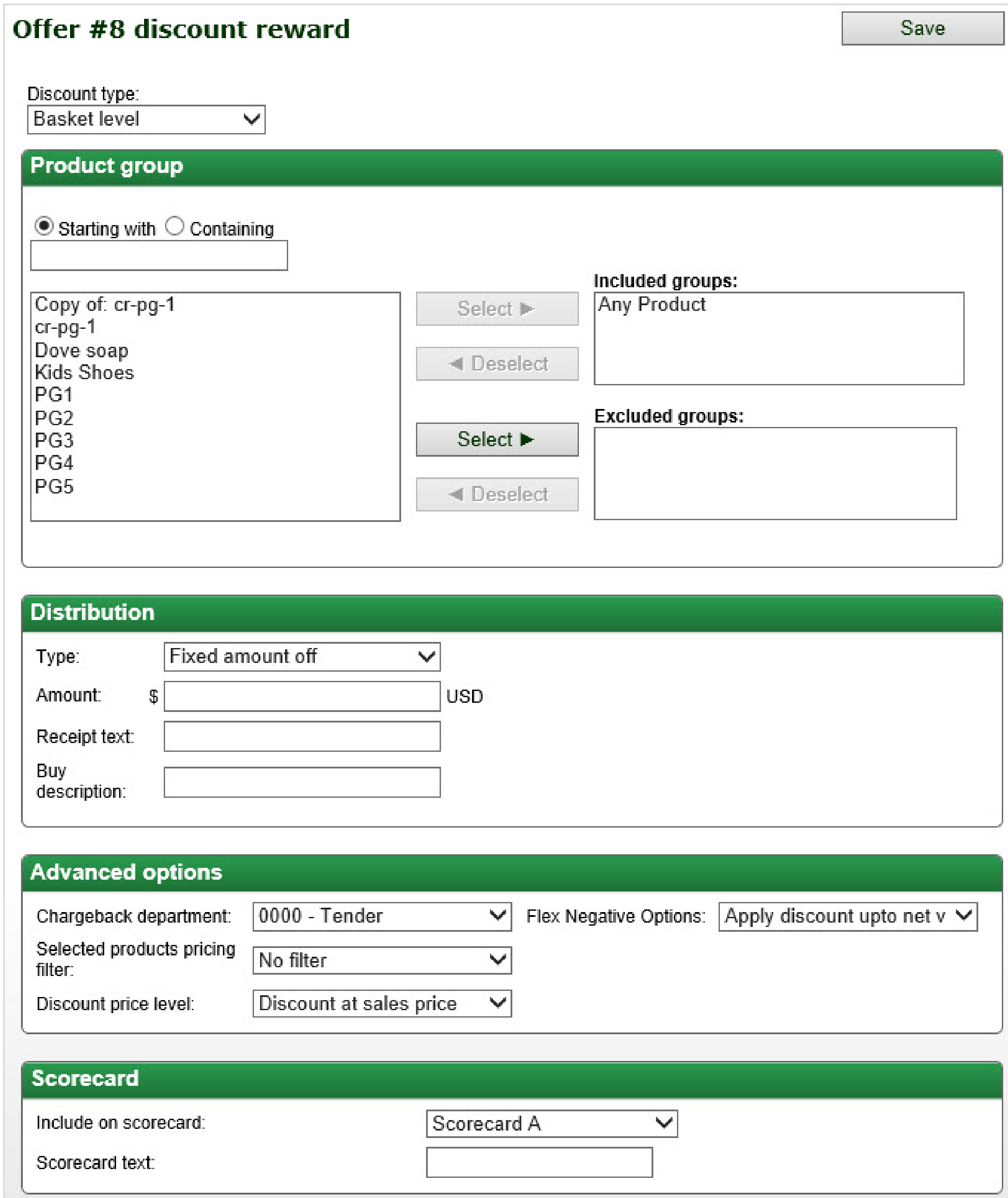
In this example, the reward is set as follows:



Basket–level Discount Type

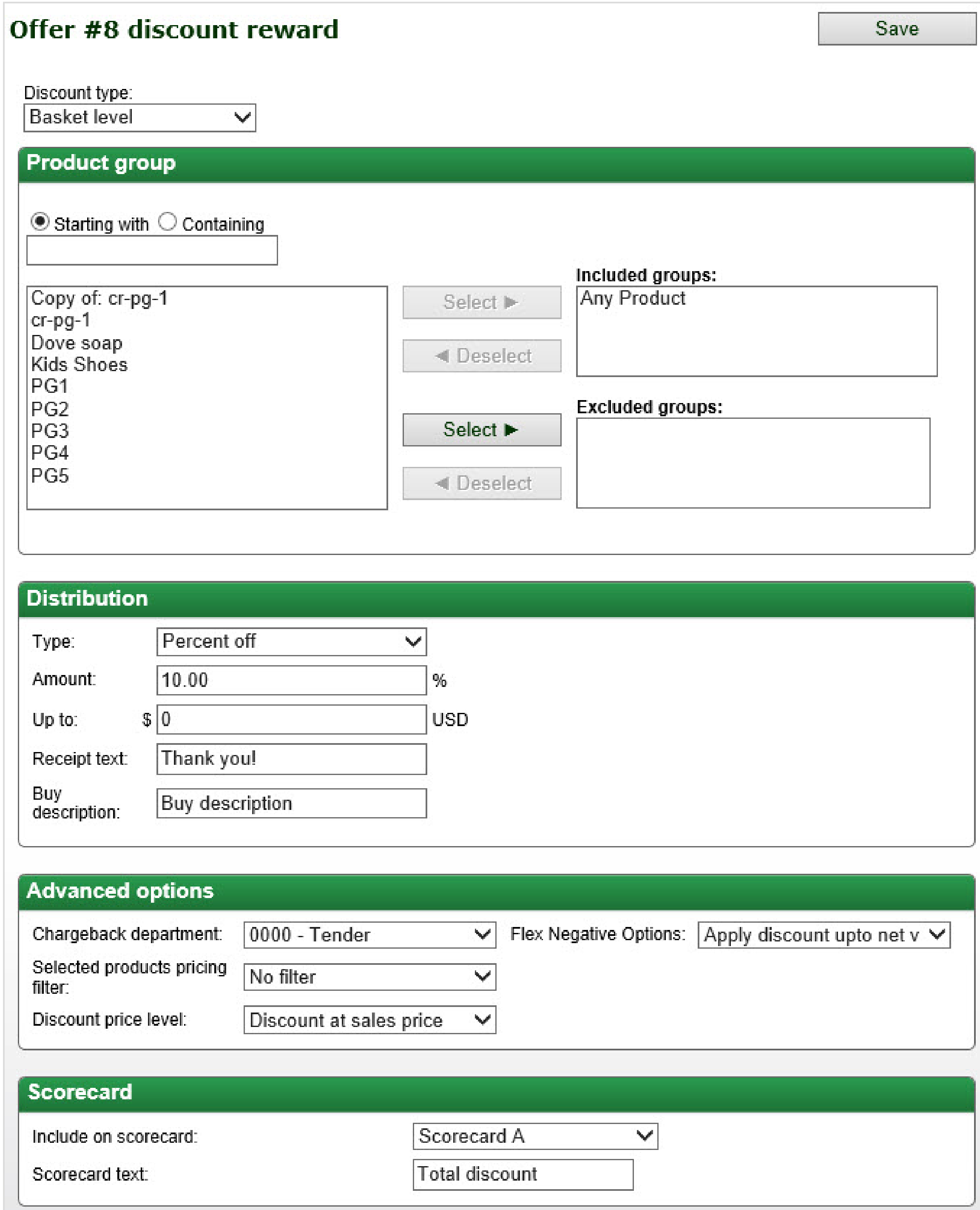
The Basket–level discount type affects the customer's overall purchase. Selecting this discount type displays the Product group, Distribution, Advanced options, and Scorecard sections.

Note: The *Any Product* group is included by default for this discount type. The retailer may exclude one or more product groups from availing this discount.



Example: A retailer is celebrating the store's 10th year anniversary. The retailer sets up an offer where customers receive a 10% discount from their total transaction price.

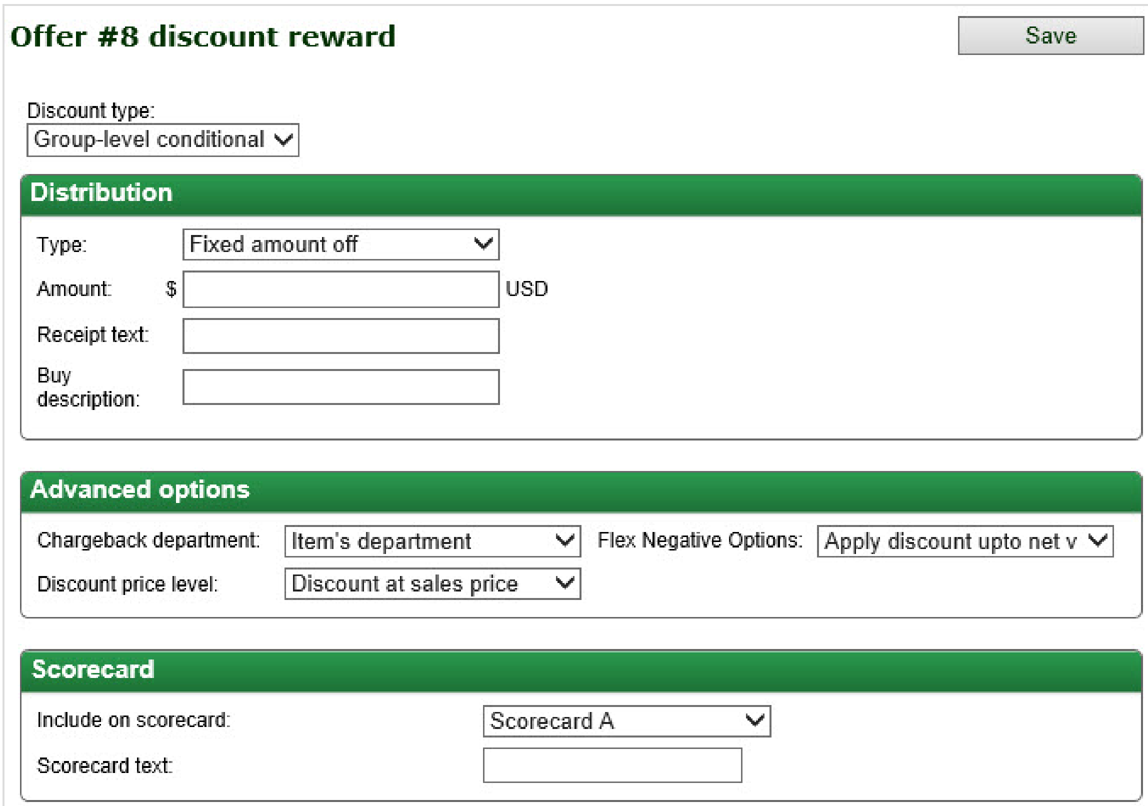
In this example, the reward is set as follows:



Group–level Conditional Discount Type

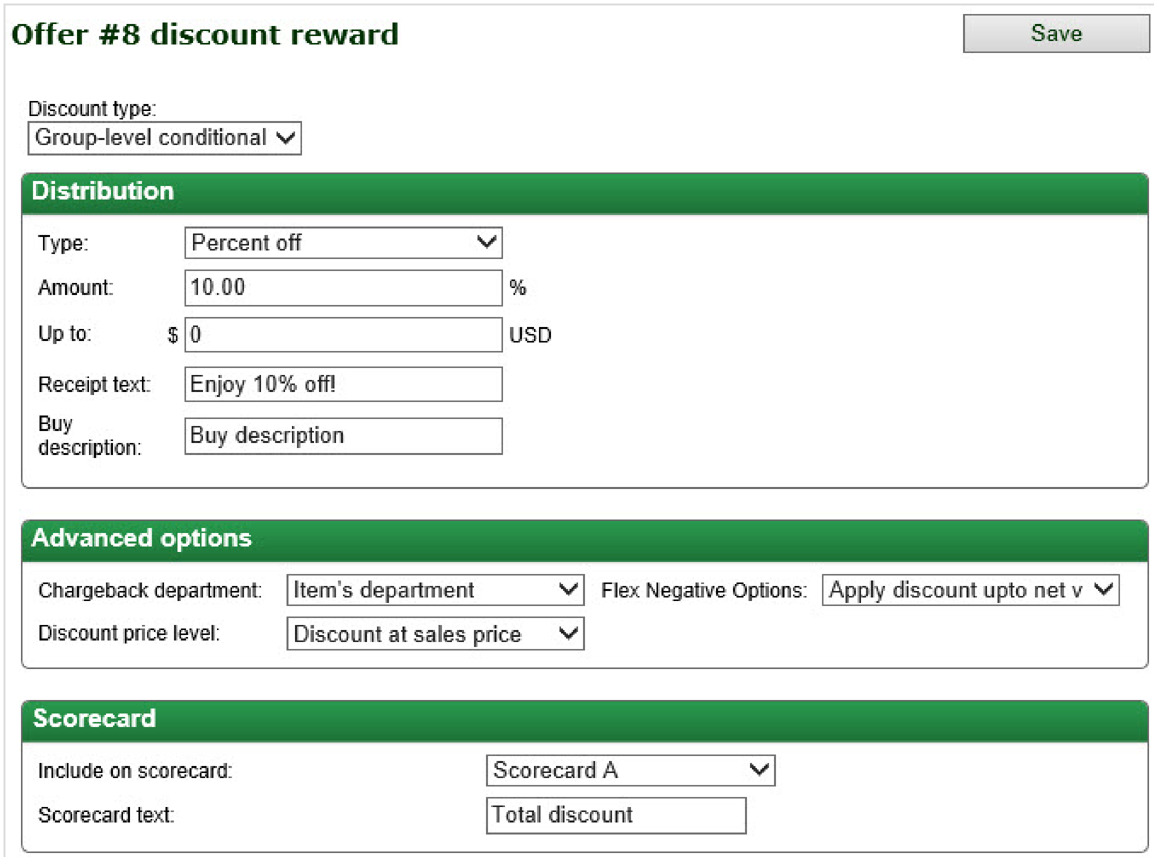
The Group–level conditional discount type affects the overall group purchase of conditional items. Selecting this discount type displays the Distribution, Advanced options, and Scorecard sections.

Note: Selecting a product group is not available for this discount type because the discount is applicable only for conditional items.



Example: A group–level conditional offer is set up where the customer receives a 10% discount when the customer purchases $100 worth of products. In a transaction, a customer purchases a TV set worth $150. The customer receives a discount of $10, which is calculated from the $100 conditional amount.

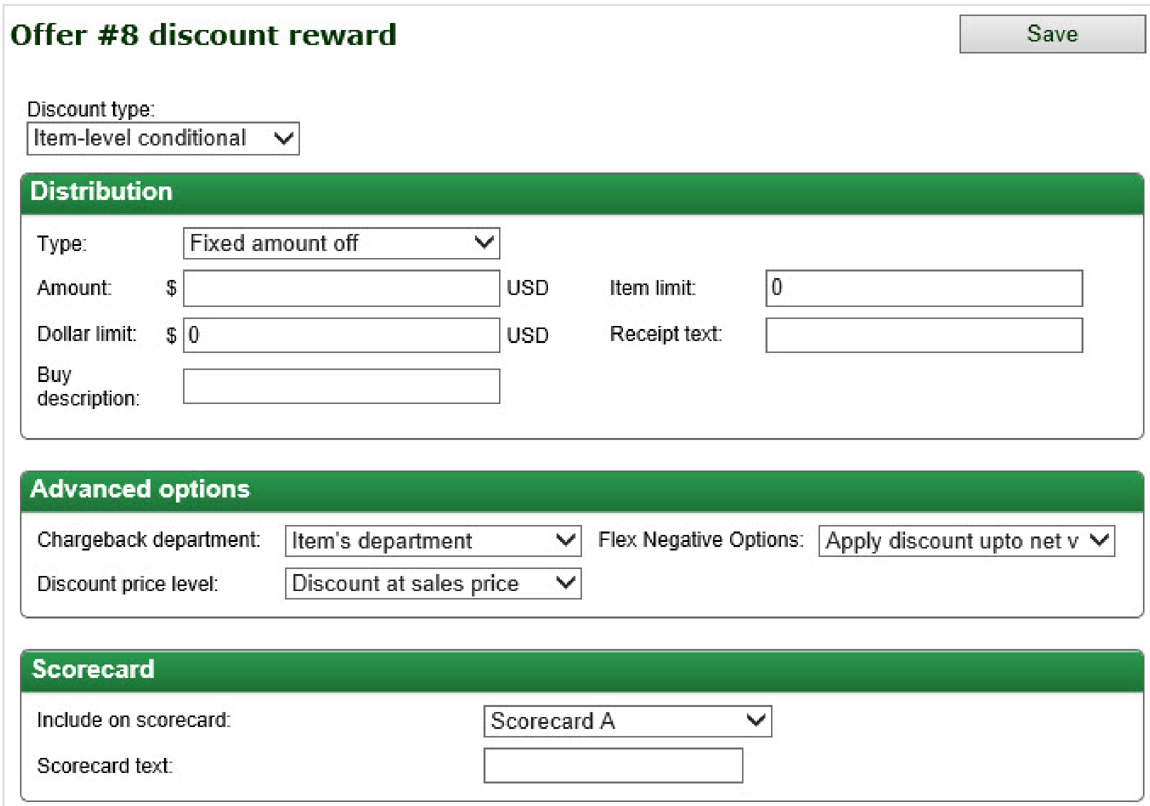
In this example, the reward is set as follows:



Item–level Conditional Discount Type

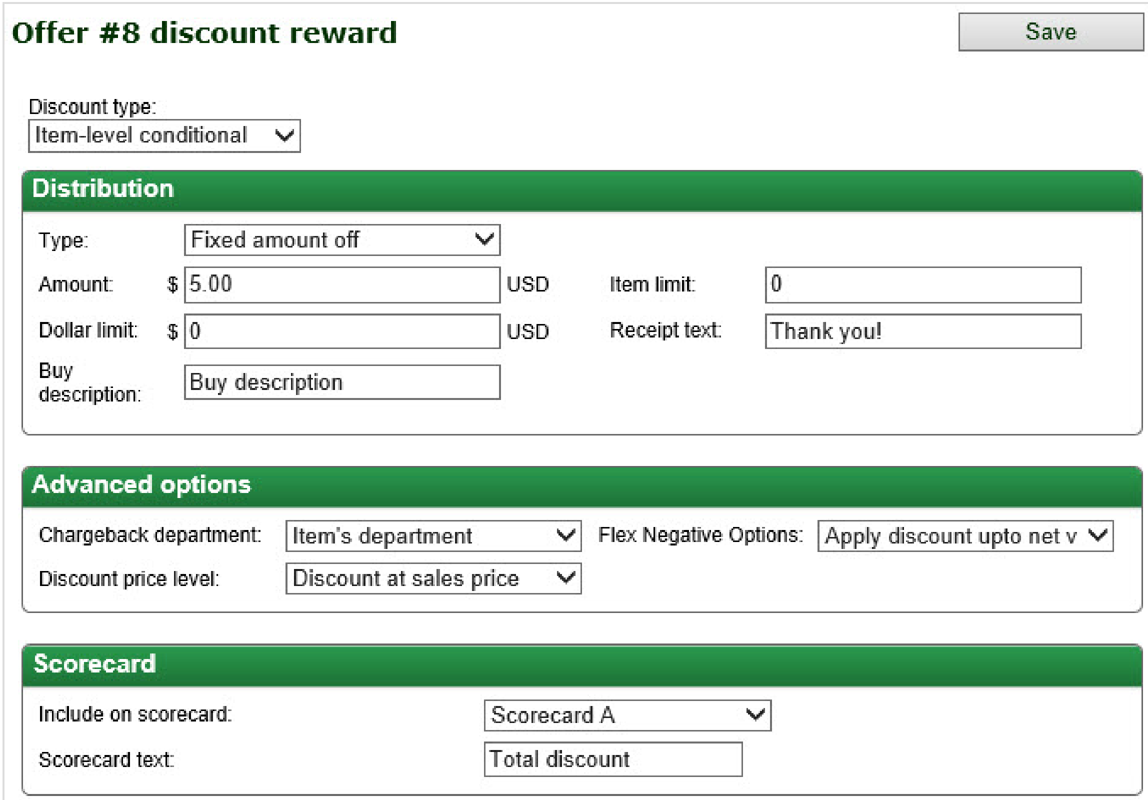
The Item–level conditional discount type affects the purchase of each conditional item. Selecting this discount type displays the Distribution, Advanced options, and Scorecard sections.

Note: Selecting a product group is not available for this discount type because the discount is applicable only for conditional items.



Example: An offer is set up where the customer receives a dollar amount off an item if the customer buys two items from a specific product group. The offer is buy two quantities of Item A, receive $5.00 off each Item A. In the transaction, when the customer purchases one Item A, there is no discount. When customer purchases another Item A in the same transaction, the customer receives a $5.00 discount off each Item A. When customer purchases more than two quantities of Item A in the same transaction, the customer receives a $5.00 discount only on the first two items.

In this example, the reward is set as follows:

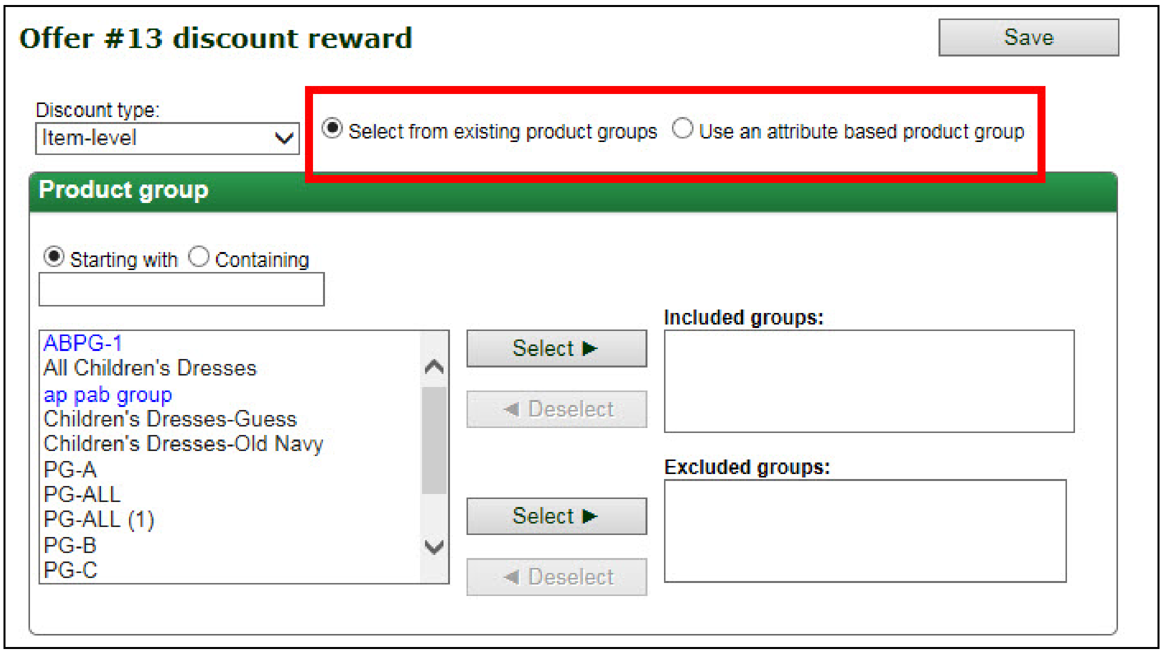


Selecting the Product Group type

The Discount Reward window displays the following options for the product group type:

- Select from existing product groups *(selected by default)*
- Use an attribute based product group

Note: These options appear only if the Product Attribute Builder is enabled. For more information, refer to *Creating Attribute–Based Product Groups* on page 438. If the Product Attribute Builder is disabled, users can select product groups only from the list of existing product groups.

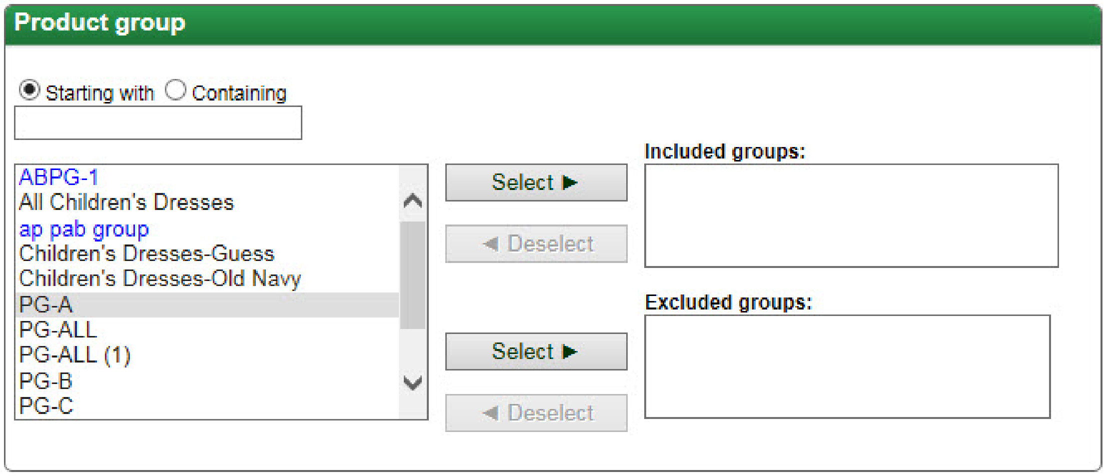


Note: Selecting these product groups is available only when creating Item–level and Department–level discount types.

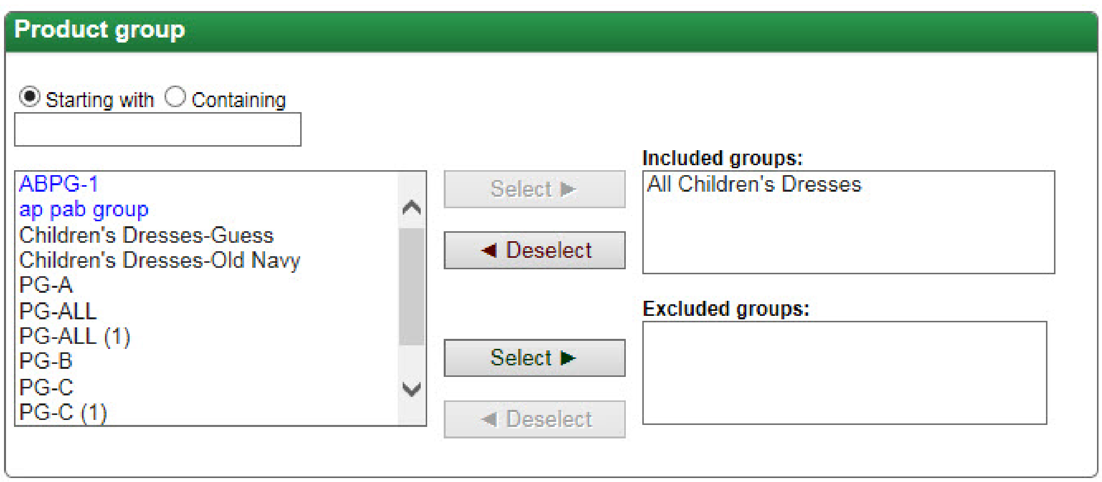
Existing Product Groups

To select a product group from the existing product groups, follow these steps:

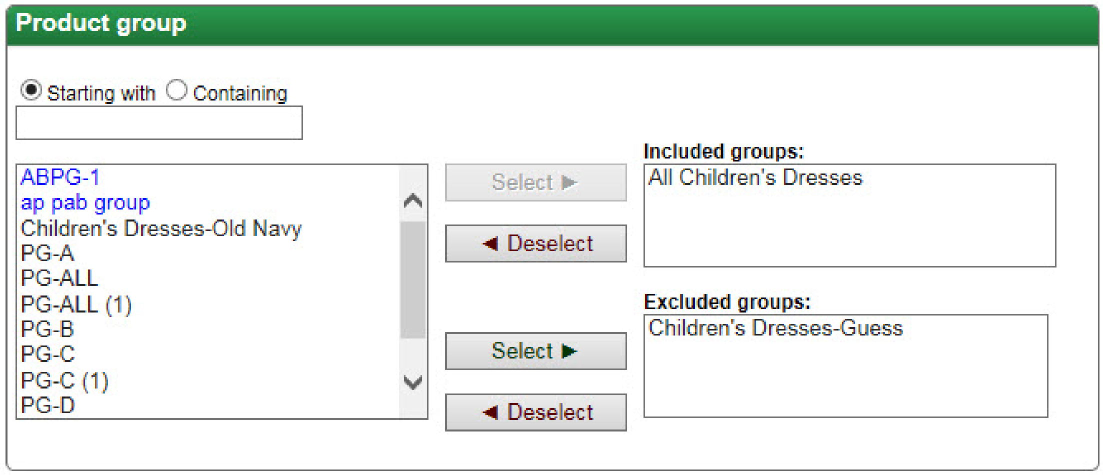
1. From the Discount Reward window, select the **Select from existing product groups** radio button. The Product group section is displayed.



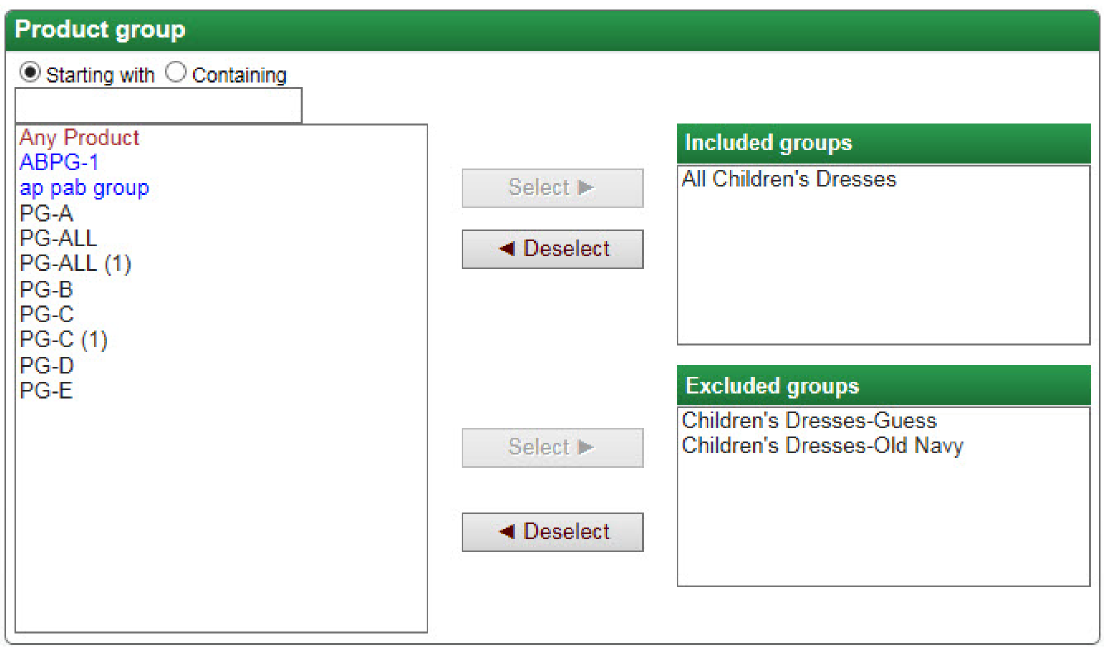
2. From the Product group section, highlight a product group name and then, use the **Select** button to include the product group in the reward. The product group is displayed in the Included groups list box. In this example, the All Children's Dresses product group is included.



3. To exclude a product group from receiving the reward, highlight a product group name in the Product group section and then, use the **Select** button to exclude the product group from receiving the reward. The product group is displayed in the Excluded groups list box. In this example, the Children's Dresses–Guess product group is excluded.



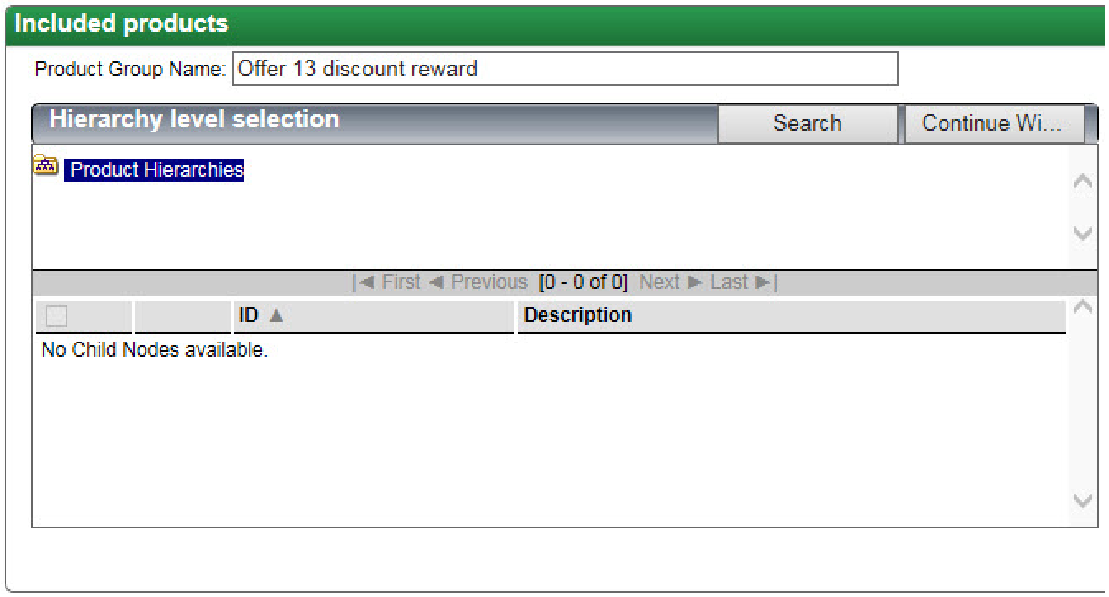
Multiple product groups can be excluded in offer rewards, as shown in this example.



Attribute Based Product Groups

To select a product group based on its attribute, follow these steps:

1. From the Discount Reward window, select the **Use an attribute based product group** radio button. The Hierarchy level selection of the Attribute Product Group Builder is displayed.

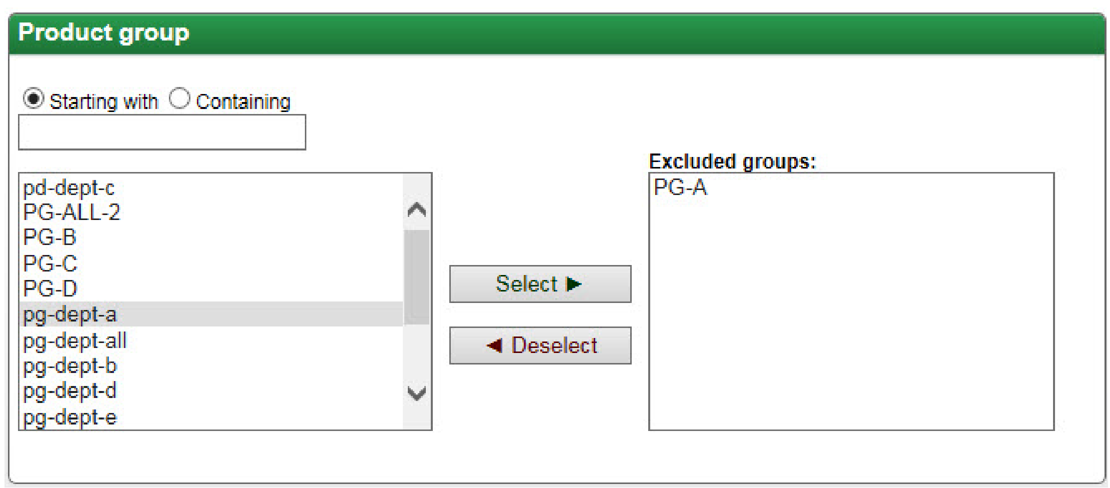


2. In the Included products section, do the following:

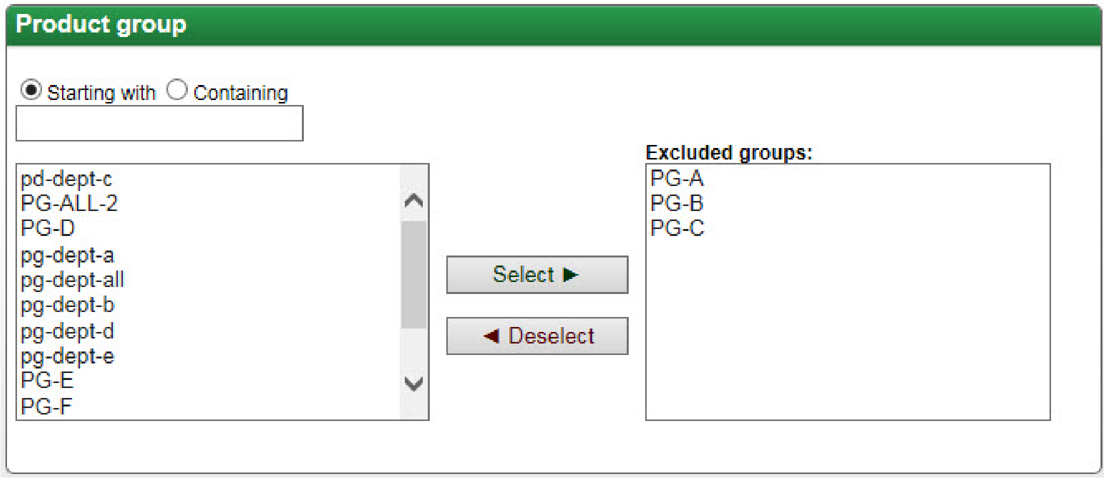
   a. Modify the Product Group Name, when necessary.

   b. Add items from Product Hierarchies. For more information, refer to *Adding Items from Product Hierarchies for Attribute Product Groups* on page 442.

3. In the Product group section, highlight a product group name and then, use the **Select** button to exclude the product group from receiving the reward. The product group is displayed in the Excluded groups list box.

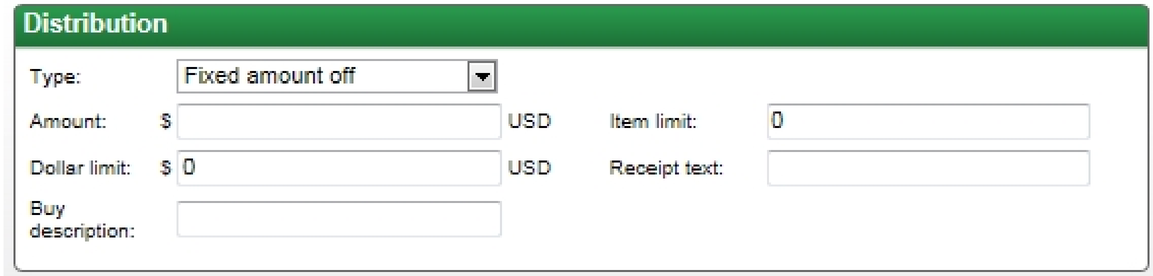


Multiple product groups can be excluded in offer rewards, as shown in this example.



Selecting the Distribution type

Select the Distribution type in the Distribution section of the Discount Reward window.



The following table displays the different Distribution types that you can select when creating a discount reward.

Distribution Type	Description
Fixed amount off	Deducts a fixed amount from the total transaction price; or from the price of items in the selected product group or conditional items. For more information, refer to *Amount Off by Item* on page 285.
Percent Off	Deducts a percentage from the price of the basket; or from the price of items in the selected product group or conditional items. For more information, refer to *Percent Off* on page 289.
Fixed amount off by weight/volume	Deducts a fixed amount from each pound or gallon of products in the selected product group or conditional items. For more information, refer to *Amount Off by Measure* on page 286.
Price point by item	Sets a fixed price for each item in the selected product group or conditional items. For more information, refer to *Price Point by Item* on page 291.
Price point by weight/volume	Sets a fixed price for each pound or gallon of items in the selected product group or conditional items. For more information, refer to *Price Point by Measure* on page 292.
Free	Indicates that items in the selected product group or conditional items are free. For more information, refer to *Free Items* on page 290.
Special pricing—price point	Indicates that items are sold at a price determined by the order in which the products are purchased. For more information, refer to *Special Pricing* on page 295.

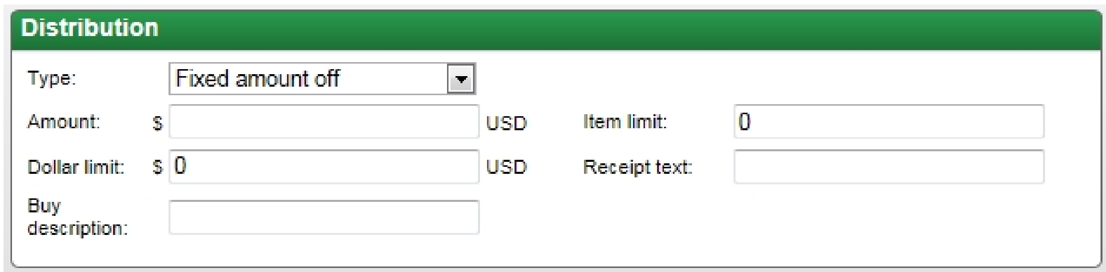
Distribution Type	Description
If the *Enable multi unit of measure for UE* setting is set to enable in the UE settings, the *Fixed amount off by weight/volume* and the *Price point by weight/volume* distribution types are not available. Instead, the following additional distribution types are available in the drop–down list.	
Fixed amount off weight	Deducts a fixed amount from each pound of products in the selected product group or conditional items.
Fixed amount off volume	Deducts a fixed amount from each gallon of products in the selected product group or conditional items.
Fixed amount off length	Deducts a fixed amount from each yard of products in the selected product group or conditional items.
Fixed amount off surface area	Deducts a fixed amount from each square yard of products in the selected product group or conditional items.
Price point—weight	Sets a fixed price for each pound of items in the selected product group or conditional items.
Price point—volume	Sets a fixed price for each gallon of items in the selected product group or conditional items.
Price point—length	Sets a fixed price for each yard of items in the selected product group or conditional items.
Price point—surface area	Sets a fixed price for each square yard of items in the selected product group or conditional items.

For more information about setting the fixed amount off multi unit distribution types, refer to *Amount Off by Measure (multi unit enabled)* on page 287. For information about setting the price point multi unit distribution types, refer to *Price Point by Measure (multi unit enabled)* on page 293.

Amount Off by Item

To set a fixed amount to be deducted from the item price, follow these steps:

1. From the Discount Reward window, in the Distribution section, select **Fixed amount off** from the Type drop–down list. The following options are displayed:



2. In the Amount field, enter the amount to be deducted from the item price or total basket price.
3. In the Item Limit field, enter the number of items up to which the discount is applied.
4. In the Dollar limit field, indicate the dollar amount that against which the discount amount cannot exceed this value.

   Example: The discount indicates a 3–item limit, a $5.00 sale price, and a $10.00 Dollar limit. If three discountable items are purchased at $6.00, $7.00, and $8.00, only the first two items are applied with the $5.00 price. The total applied discount would not exceed $10.00.

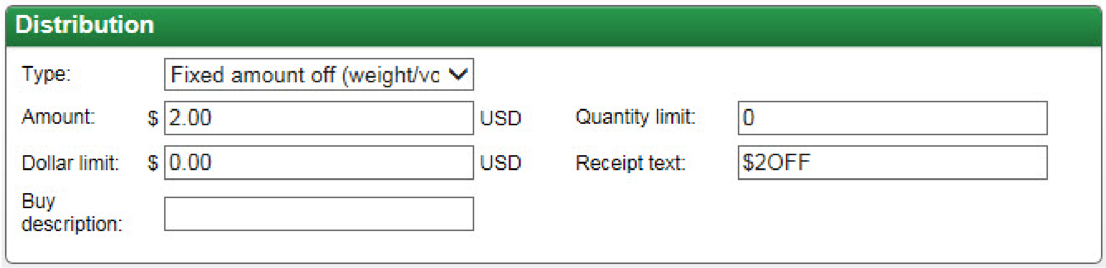
Note: For precision purposes, the values for Amount and Dollar limit can have up to five decimal values.

5. In the Receipt text field, enter a brief message that is printed on the receipt when the discount is rewarded.
6. In the Buy description field, enter a brief description of the discount.
7. Select **Save**. The application displays the discount details in the Rewards sub–page.

Amount Off by Measure

To set a fixed amount to be deducted from each pound or gallon of products in the selected product group or conditional items, follow these steps:

1. From the Discount Reward window, in the Distribution section, select **Fixed amount off (weight/volume)** from the Type drop–down list. The following options are displayed:



2. In the Amount field, enter the amount to be deducted from each pound or gallon of products in the selected product group or conditional items.
3. In the Quantity limit field, enter the quantity up to which the discount is applied.

   Example: The discount indicates a $1.00 sale price and a 3–gallon quantity limit. If a customer purchases 5 gallons of water, only 3 gallons of the item qualify for the $1.00 discount.
4. In the Dollar limit field, indicate the dollar amount that against which the discount amount cannot exceed this value.

Note: For precision purposes, the values for Amount and Dollar limit can have up to five decimal values while the value for Quantity limit can have up to three decimal values.

5. In the Receipt text field, enter a brief message that is printed on the receipt when the discount is rewarded.
6. In the Buy description field, enter a brief description of the discount.
7. Select **Save**. The application displays the discount details in the Rewards sub–page.

Amount Off by Measure (multi unit enabled)

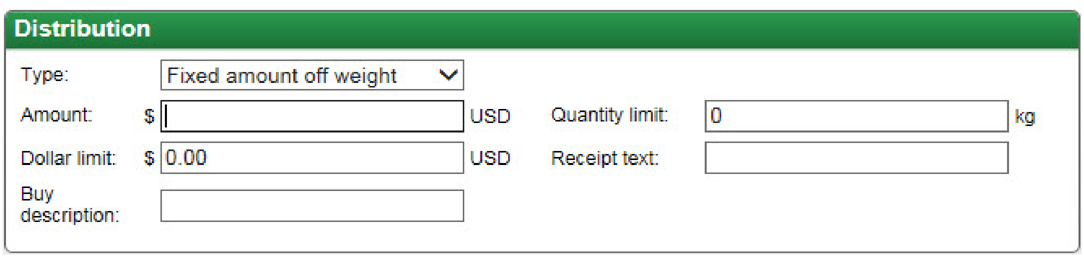
If the *Enable multi unit of measure for UE* setting is set to enable in the UE settings, the *Fixed amount off (weight/volume)* distribution type is not available. Instead, the following additional distribution types are available in the drop–down list:

- Fixed amount off weight
- Fixed amount off volume
- Fixed amount off length
- Fixed amount off surface area

To set a fixed amount to be deducted from each pound, gallon, yard, or square yard of products in the selected product group or conditional items, follow these steps:

1. From the Discount Reward window, in the Distribution section, select one of the following types from the Type drop–down list:
    - **Fixed amount off weight**
    - **Fixed amount off volume**
    - **Fixed amount off length**
    - **Fixed amount off surface area**

    The following options are displayed:



2. In the Amount field, enter the amount to be deducted from each pound, gallon, yard, or square yard of products in the selected product group or conditional items.
3. In the Quantity limit field, enter the quantity up to which the discount is applied.
4. In the Dollar limit field, indicate the dollar amount that against which the discount amount cannot exceed this value.

    Example: The discount indicates a $1.00 sale price, a 5-kilogram quantity limit, and a $4.00 Dollar limit. If a customer purchases 10 kilograms of flour, only 4 kilograms of the item qualifies for the $1.00 discount, to a total of $4.00 discount. The total applied discount would not exceed $4.00.

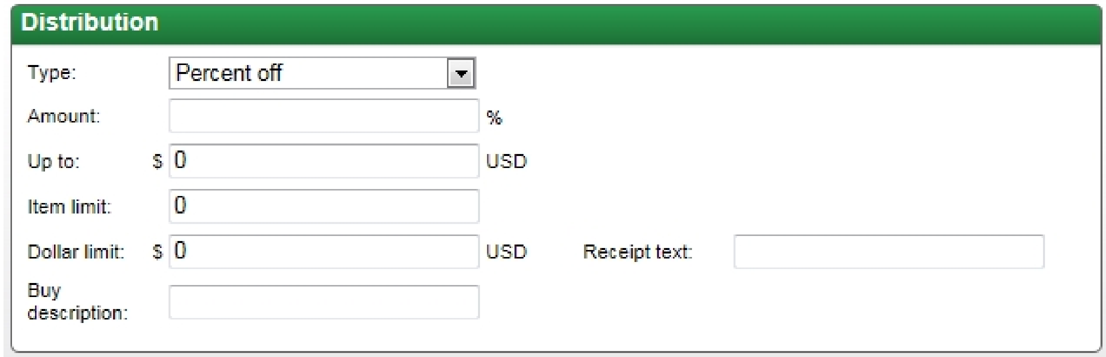
Note: For precision purposes, the values for Amount and Dollar limit can have up to five decimal values while the value for Quantity limit can have up to three decimal values.

5. In the Receipt text field, enter a brief message that is printed on the receipt when the discount is rewarded.
6. In the Buy description field, enter a brief description of the discount.
7. Select **Save**. The application displays the discount details in the Rewards sub–page.

Percent Off

To deduct a percentage amount from the total price of the customer's basket or from the price of items in the selected product group or conditional items, follow these steps:

1. From the Discount Reward window, in the Distribution section, select **Percent off** from the Type drop–down list. The following options are displayed:



2. In the Amount field, enter the percentage amount to be deducted from the total basket price or from the price of items in the selected product group or conditional items.
3. In the Up to field, enter the dollar amount up to which the discount is applied. This value is used per discount where a single discount amount cannot exceed this value.

   Example: The discount is 10% off up to $25. This means that the item would not receive more than $25.00 for that individual discount.
4. In the Item Limit field, enter the number of items up to which the percentage discount is applied.
5. In the Dollar limit field, indicate the dollar amount that against which the discount amount cannot exceed this value.

   Example: The discount indicates a 3–item limit, a $5.00 sale price, and a $10.00 Dollar limit. If three discountable items are purchased at $6.00, $7.00, and $8.00, only the first two items are applied with the $5.00 price. The total applied discount would not exceed $10.00.

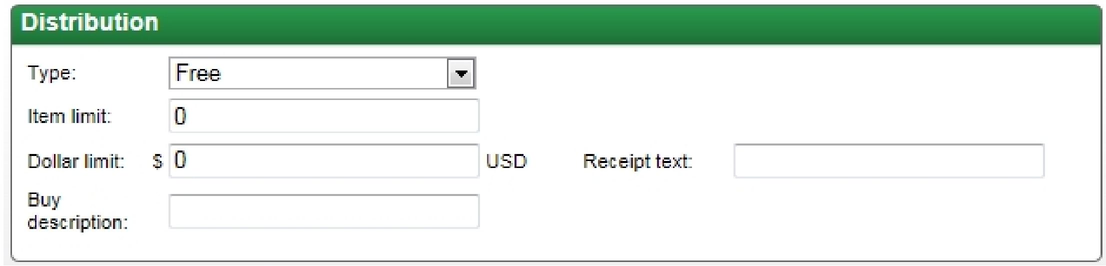
Note: For precision purposes, the values for Up to and Dollar limit can have up to five decimal values.

6. In the Receipt text field, enter a brief message that is printed on the receipt when the discount is rewarded.
7. In the Buy description field, enter a brief description of the discount.
8. Select **Save**. The application displays the discount details in the Rewards sub–page.

Free Items

To set free items in the selected product group or conditional items, follow these steps:

1. From the Discount Reward window, in the Distribution section, select **Free** from the Type drop–down list. The following options are displayed:



2. In the Item Limit field, enter the number of items up to which the discount is applied.
3. In the Dollar limit field, indicate the dollar amount that against which the discount amount cannot exceed this value.

   Example: 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.

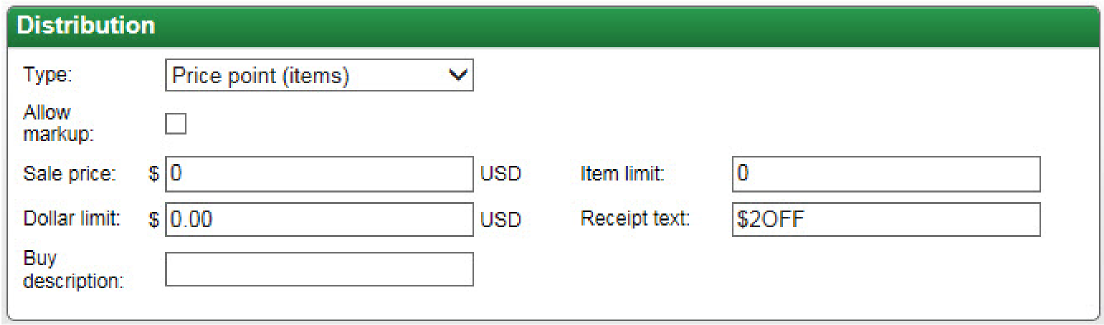
Note: For precision purposes, the value for Dollar limit can have up to five decimal values.

4. In the Receipt text field, enter a brief message that is printed on the receipt when the discount is rewarded.
5. In the Buy description field, enter a brief description of the discount.
6. Select **Save**. The application displays the discount details in the Rewards sub–page.

Price Point by Item

To set a fixed price for each item in the selected product group or conditional items, follow these steps:

1. From the Discount Reward window, in the Distribution section, select **Price point (items)** from the Type drop–down list. The following options are displayed:



2. In the Item Limit field, enter the number of items up to which the discount is applied.
3. In the Sale price field, specify the fixed price of each item.
4. In the Dollar limit field, indicate the dollar amount that is used where a single discount amount cannot exceed this value.

   Example: The discount indicates a 3–item limit, a $5.00 sale price, and a $10.00 Dollar limit. If three discountable items are purchased at $6.00, $7.00, and $8.00, only the first two items are applied with the $5.00 price. The total applied discount would not exceed $10.00.

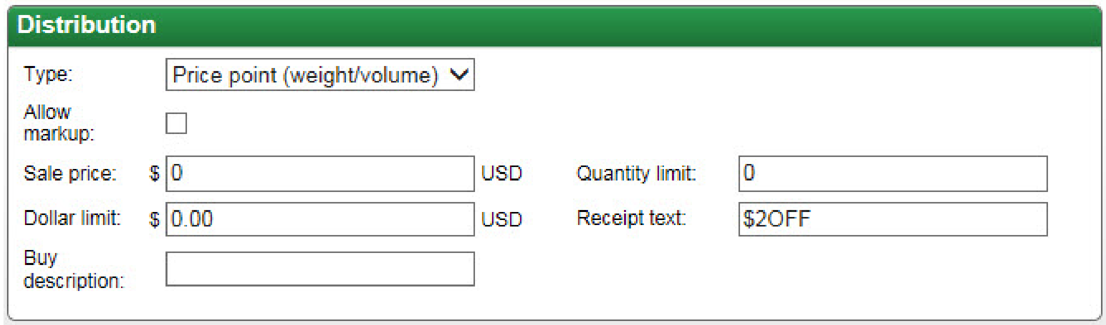
Note: For precision purposes, the values for Sale price and Dollar limit can have up to five decimal values.

5. In the Receipt text field, enter a brief message that is printed on the receipt when the discount is rewarded.
6. In the Buy description field, enter a brief description of the discount.
7. Select **Save**. The application displays the discount details in the Rewards sub–page.

Price Point by Measure

To set a fixed price by measure for each item in the selected product group or conditional items, follow these steps:

1. From the Discount Reward window, in the Distribution section, select **Price point (weight/volume)** from the Type drop–down list. The following options are displayed:



2. In the Sale price field, specify the fixed price of the specified measurement.
3. In the Quantity limit field, enter the quantity up to which the discount is applied.

   Example: The discount indicates a 2–gallon quantity limit and a $2.99 sale price. If four gallons of a discountable item was purchased, only the first two gallons are applied with the $2.99 price.

4. In the Dollar limit field, indicate the dollar amount that is used where a single discount amount cannot exceed this value.

Note: For precision purposes, the values for Sale price and Dollar limit can have up to five decimal values while the value for Quantity limit can have up to three decimal values.

5. In the Receipt text field, enter a brief message that is printed on the receipt when the discount is rewarded.
6. In the Buy description field, enter a brief description of the discount.
7. Select **Save**. The application displays the discount details in the Rewards sub–page.

Price Point by Measure (multi unit enabled)

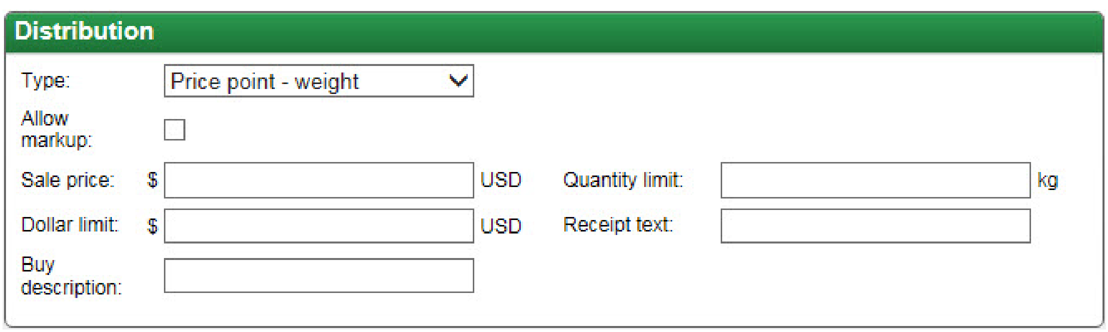
If the *Enable multi unit of measure for UE* setting is set to enable in the UE settings, the *Price point (weight/volume)* distribution type is not available. Instead, the following additional distribution types are available in the drop–down list:

- Price point – weight
- Price point – volume
- Price point – length
- Price point – surface area

To set a fixed price by measure for each item in the selected product group or conditional items, follow these steps:

1. From the Discount Reward window, in the Distribution section, select one of the following types from the Type drop–down list:
   - **Price point – weight**
   - **Price point – volume**
   - **Price point – length**
   - **Price point – surface area**

   The following options are displayed:

2. In the Sale price field, specify the fixed price of the specified measurement.
3. In the Quantity limit field, enter the quantity up to which the discount is applied.

   Example: The discount indicates a 2–gallon quantity limit and a $2.99 sale price. If four gallons of a discountable item was purchased, only the first two gallons are applied with the $2.99 price.
4. In the Dollar limit field, indicate the dollar amount that is used where a single discount amount cannot exceed this value.

Note: For precision purposes, the values for Amount and Dollar limit can have up to five decimal values while the value for Quantity limit can have up to three decimal values.

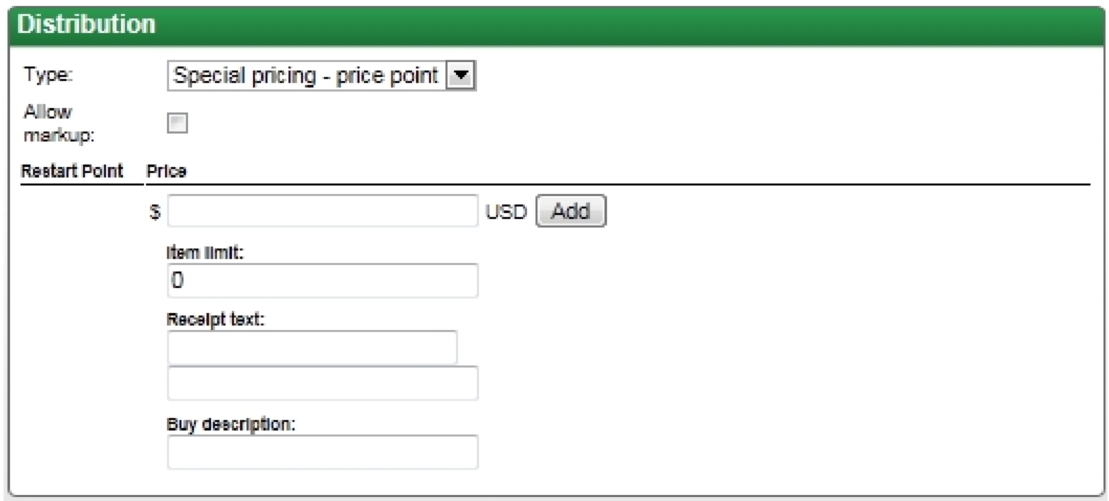
5. In the Receipt text field, enter a brief message that is printed on the receipt when the discount is rewarded.
6. In the Buy description field, enter a brief description of the discount.
7. Select **Save**. The application displays the discount details in the Rewards sub–page.

Special Pricing

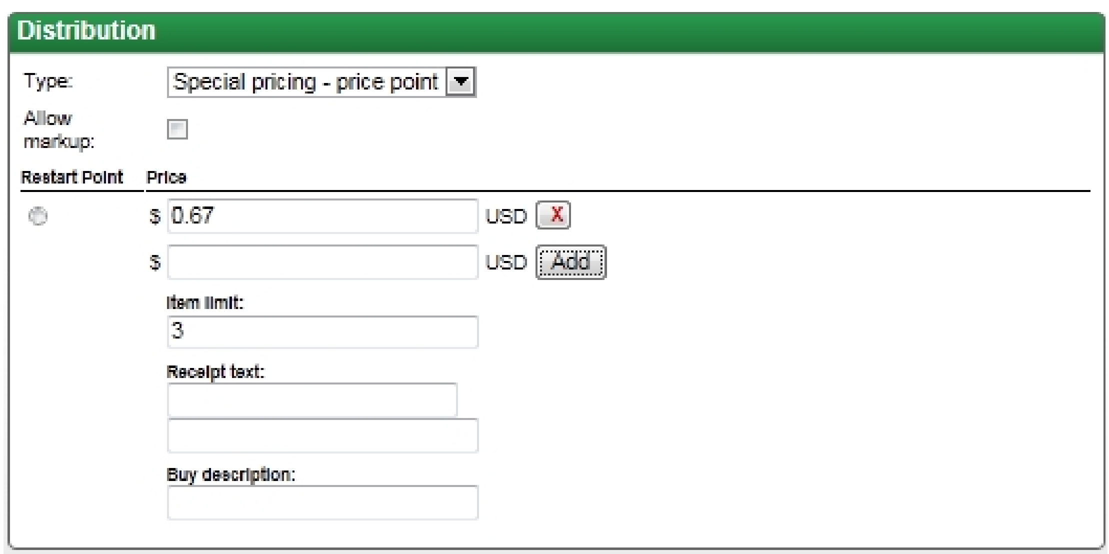
To set more than one fixed price for items based on the order by which they are purchased, follow these steps:

Note: The steps in this procedure are based on three price points set at $0.67, $0.66 and $0.66, respectively.

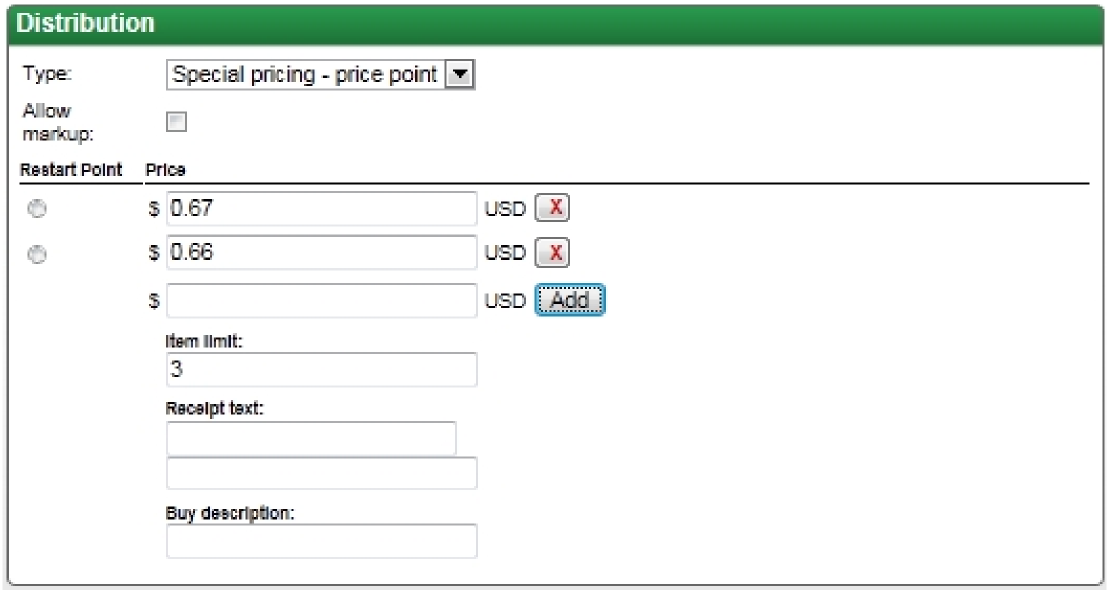
1. From the Discount Reward window, in the Distribution section, select **Special pricing–Price point** from the Type drop–down list. The following options are displayed:



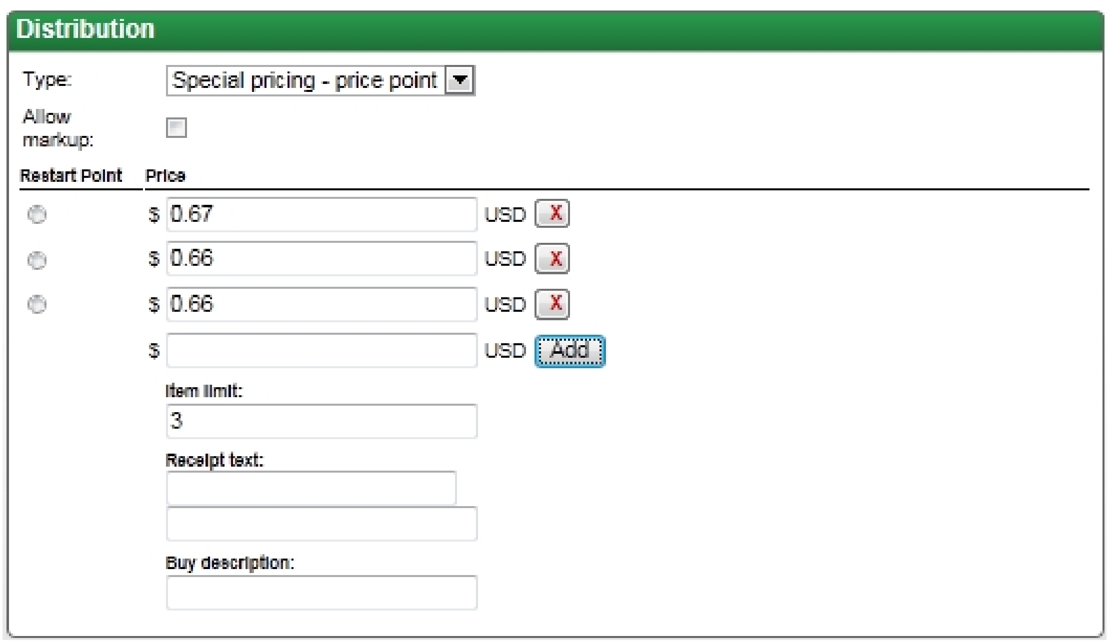
2. Enter the number of price points in the Item Limit field.
3. Enter the first price point in the Amount field and then, select **Add**. The application displays the following:



4. Enter the second price point in the Amount field and then, select **Add**. The application displays the following:



5. Enter the third price point in the Amount field and then, select **Add**. The application displays the following:



Note: For precision purposes, the values for Amount can have up to five decimal values.

6. Select a radio button of the corresponding price point at which the cycle is repeated if more products are bought than there are price points.

Example: If the first price point is selected, 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.

7. In the Receipt text field, enter a brief message that is printed on the receipt when the discount is rewarded.
8. In the Buy description field, enter a brief description of the discount.
9. Select **Save**. The application displays the discount details in the Rewards sub–page.

Setting the Advanced options

Set the Advanced options in the Advanced options section of the Discount Reward window.

To set the Advanced options, follow these steps:

1. From the **Chargeback department** drop–down list, select a department against which the discount is charged. For more information, refer to *Creating Chargeback Departments* on page 619.
2. From the **Selected products pricing filter** drop–down list, select any of the following product pricing filters:

Products pricing filter	If selected
No filter	All the products in the selected product group are qualified for the discount reward evaluation.
Clearance Levels—filters that determine which items are qualified for the discount reward evaluation.	
Full Price	Only non–clearance items that do not have any discount in the transaction are qualified for the discount reward evaluation.
Not on Clearance	Only non–clearance items are qualified for the discount reward evaluation. Clearance items are not considered for evaluation.
Any Clearance Level	Only non–clearance items are qualified for the discount reward evaluation. Clearance items are not considered for evaluation.
Clearance Levels (1...3)	Only the items with the selected clearance level are qualified for the discount reward evaluation.

3. From the **Discount price level** drop–down list, select any of the following options:

Discount price level	Description
Discount at sales price	Applies the discount on the unit price of the item. **Sales price** is the unit price of the item at the time of purchase. The sales price can be higher or lower in value than the original price of the item due to reasons such as a markdown price.

Discount at original price	Applies the discount on the alternate price of the item. Each item has an alternate price, which is the original price of the item. When this option is selected, the following occurs:
	• The total discount rewarded is the sum of the following:
	  • the discount amount set
	  • the sales price minus the original price
	Note: If the total discount is negative, no discount is given.
	• The total discount to reward <u>must not be</u> higher in value than the original price and the sales price. Otherwise, the discount rewarded is the lowest of the original price and the sales price.

Note: The discount price level options are only available if the **Display alternate price application selection** option in the UE settings is set to **Yes**. If the option is set to **No**, the discount is automatically applied on the sales price.

Example: The following are examples of using the *Discount at original price* option.

Original Price	Selling Price	Discount Amount	Discount Given	Customer Pays
$20	$30	$15	$20	$10
$40	$30	$15	$5	$25
$30	$30	$15	$15	$15
$2	$3	$15	$2	$1
$4	$3	$15	$3	$0
$3	$3	$15	$3	$0
$15	$15	$15	$15	$0
$10	$30	$15	$10	$20
$50	$40	$8	$0	$40

4. From the *Flex Negative Options* drop–down list, select any of the following options:

Flex Negative Option	Description
Do not apply discount if exceeds net value	The reward is rejected; therefore, no discount is applied.
Apply discount upto net value	The reward is honored, but the total discount is equivalent to the net value of the discount.
Apply complete discount even if net value goes negative	The reward is honored, and the total discount is applied to the total transaction amount. In this case, the retailer gives the remaining amount back to the customer.

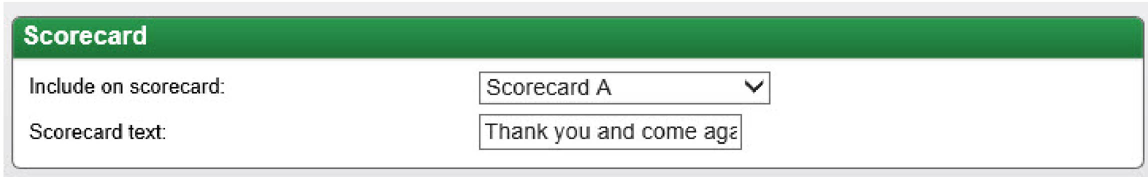
Note: The default value of the Flex Negative Options is set in the UE settings. For more information, refer to *Accessing UE Settings* on page 729.

Example: An offer is set up where the customer receives $5.00 off the Woman's Dress product group if the customer purchases at least one dress. A customer purchases a dress that is worth $3.50. The discount can be one of the following depending on the selected Flex Negative Option:

Flex Negative Option selected	Discount Reward
Do not apply discount if exceeds net value	$0 (no discount)
Apply discount upto net value	$3.50
Apply complete discount even if net value goes negative	$5.00

Setting the Scorecard options

Set the scorecard options in the Scorecard section of the Discount Reward window.



To set the scorecard options, follow these steps:

1. From the **Include on scorecard** drop–down list, select a scorecard. The default scorecard is selected by default.
2. In the **Scorecard text** field, enter a text to be displayed in the scorecard section of the receipt.

Note: For more information about discount scorecards, refer to *Discount Scorecards* on page 648.

Points Reward

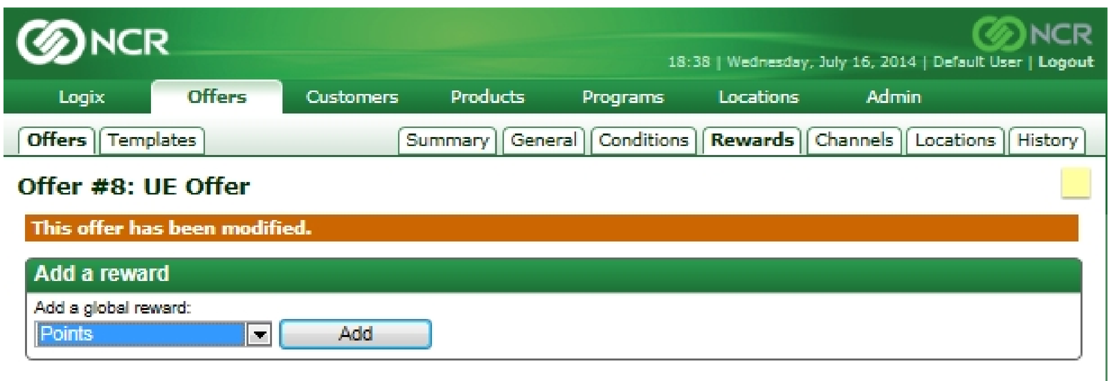
Points Rewards are used to grant customers a specified number of points from a points program. On the other hand, Stored Value Rewards grant customers a certain number of units from a stored value program, each unit of which is associated with a particular value. This section describes how to set Points Rewards.

Example: A retailer creates a Bread Points program to encourage customers to visit the bakery. An offer is set up that rewards customers with 10 points in the Bread Points program if customer purchases $5 worth of bread.

Setting Points Rewards

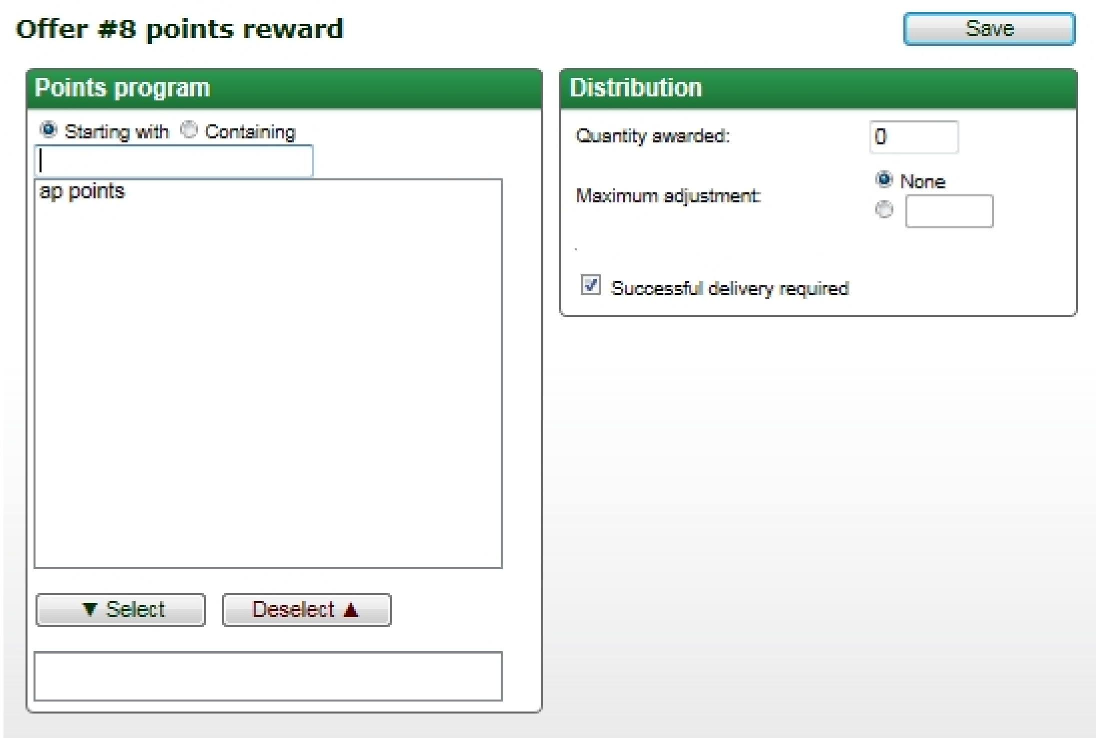
To set points rewards, follow these steps:

1. Select any offers from the Offers page and then select the **Rewards** sub–page tab. The Offer Rewards sub–page is displayed.



2. From the Global Reward drop–down list, select **Points**.

3. Select **Add**. The Points Reward window is displayed as shown in the following example:



Note: To create a points program, refer to *Creating Points Programs* on page 488.

4. Use the following table to set parameters in specific sections:

In the section	Do the following:
Points Program	Highlight a points program and then, use the Select button to set the program as the reward. The selected program is displayed in the bottom box. **Note:** When a customer condition is set to “Any Customer,” create a points program which has the “Allow non–cardholders to earn/redeem” flag enabled. Enabling this flag allows the program to appear in the list when the customer condition is set to “Any Customer.” With this feature, customers can earn or redeem points within a transaction without being a cardholder. However, once the transaction has completed, the points will be discarded.
Distribution	• In the Quantity awarded field, enter the number of points to be awarded. **Note:** Enter a negative value to remove points from the customer's balance. **Example:** The retailer sets up an offer where customer can redeem $5 from their 100 points. The Points Reward is then set up with a negative value because the retailer takes away 100 points from the customer to reward $5 off from the customer's purchase. • In the Maximum adjustment field, select the **None** radio button; or enter a value that is the maximum size of points adjustments that can be made for the reward. **Note:** The retailer can manually adjust the points balance of the customer using the Customer Inquiry tab even if the adjustment value exceeds the Maximum adjustment set in this section. For more information, refer to *Adjusting Points Balance through Offers Tab* on page 392. • Select the **Successful delivery required** check box to require the reward to be satisfied. Otherwise, if the offer consists of multiple rewards, no other rewards will be given unless the delivery of this reward is successful.

5. Select **Save**. The application displays the Points Reward details in the Offer Reward sub–page.

Note: To delete a reward, select the corresponding **X** button.

Stored Value Reward

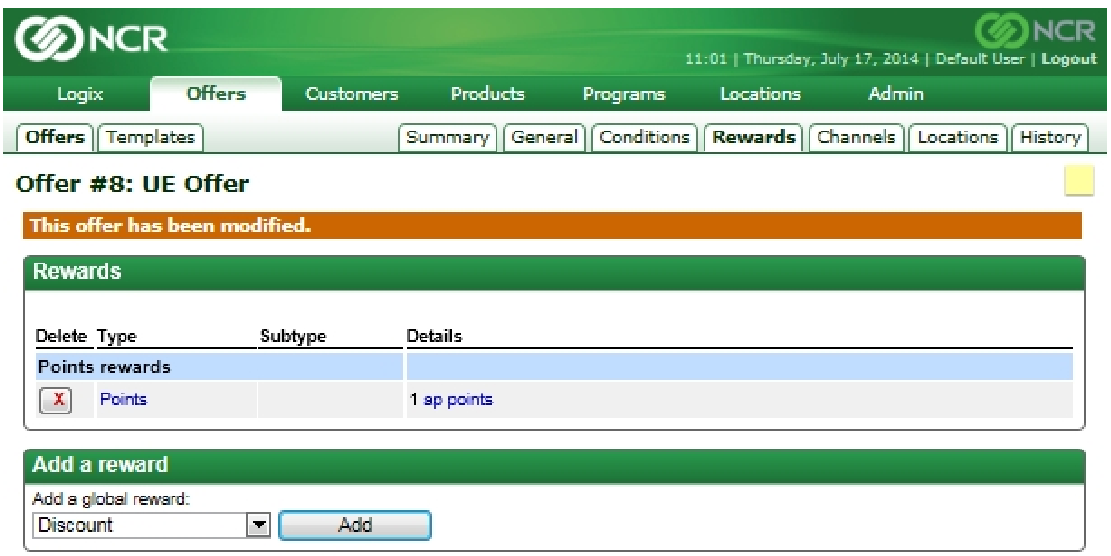
Stored Value Rewards grant customers a certain <u>number of units</u> from a stored value program, each unit of which is associated with a particular value. On the other hand, Points Rewards are used to grant customers a specified <u>number of points</u> from a points program. This section describes how to set Stored Value Rewards.

Example: A retailer creates a Fuel Stored Value Points program to reward customers when they buy gasoline. An offer is set up that rewards customers with 100 stored value points in this program if customer purchases 5 gallons of gasoline.

Setting Stored Value Rewards

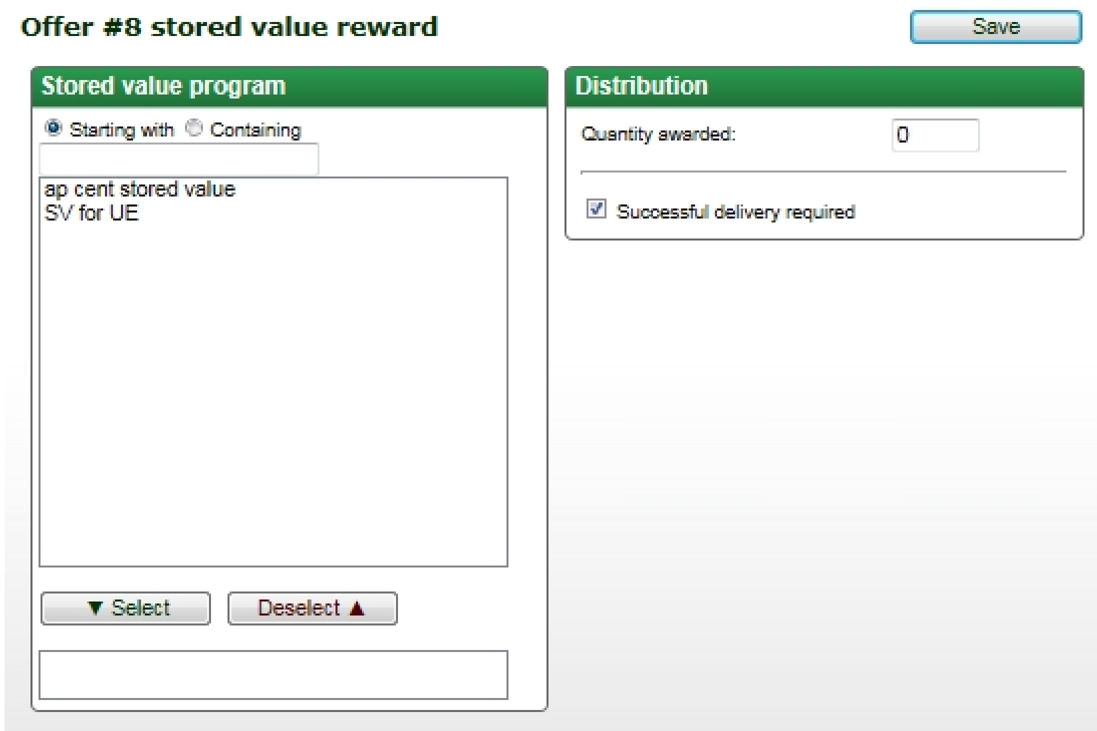
To set stored value rewards, follow these steps:

1. Select any offers from the Offers page and then select the **Rewards** sub–page tab. The Offer Rewards sub–page is displayed.



2. From the Global Reward drop–down, list, select **Stored Value**.

3. Select **Add**. The Stored Value Reward window is displayed as shown in the following example:



Note: To create a stored value program, refer to *Creating Stored Value Programs* on page 496.

4. Use the following table to set parameters in specific sections:

In the section	Do the following:
Stored Value Program	Highlight a stored value program and then, use the **Select** button to set the program as the reward. The selected program is displayed in the bottom text box. **Note:** When a customer condition is set to "Any Customer," create a stored value program which has the "Allow non–cardholders to earn/redeem" flag enabled. Enabling this flag allows the program to appear in the list when the customer condition is set to "Any Customer." With this feature, customers can earn or redeem stored value units within a transaction without being a cardholder. However, once the transaction has completed, the stored value units are discarded.
Distribution	• In the **Quantity awarded** field, enter the number of stored value units to be awarded. **Note:** Enter a negative value to deduct stored value units from the customer's balance. **Example:** The retailer sets up an offer where customer can redeem $5 from their 100 points. The Stored Value Reward is then set up with a negative value because the retailer takes away 100 points from the customer to reward $5 off from the customer's purchase. • Select the **Successful delivery required** check box to require the reward to be satisfied. Otherwise, if the offer consists of multiple rewards, no other rewards are given unless the delivery of this reward is successful.

5. Select **Save**. The application displays the Stored Value Reward details in the Offer Reward sub–page.

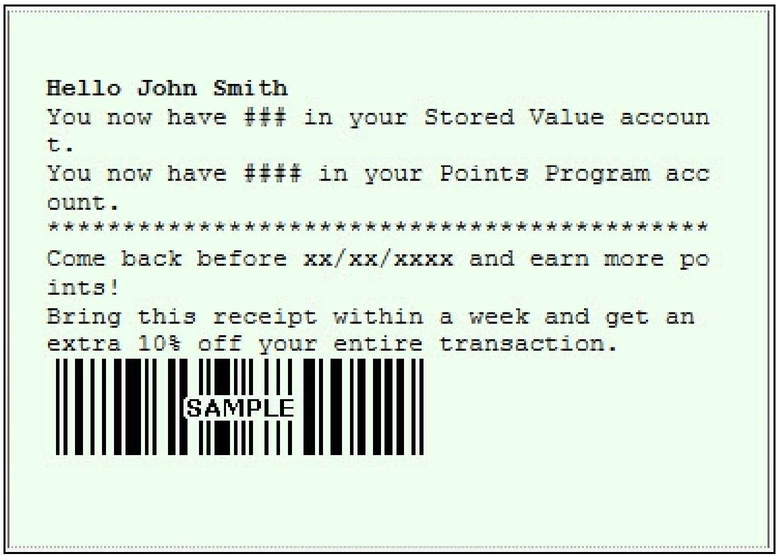
Note: To delete a reward, select the corresponding **X** button.

Printed Message Reward

Printed Message Rewards permit users to enter text that is printed on customer receipts. This section describes how to set Printed Message Rewards.

Note: Faint vertical lines in the message text box are only guides to help count the number of characters in each row. The lines appear after every 10 characters but, the number of characters that are displayed on a line in the final printed version may be affected by style tags.

The following is a sample of a printed message:

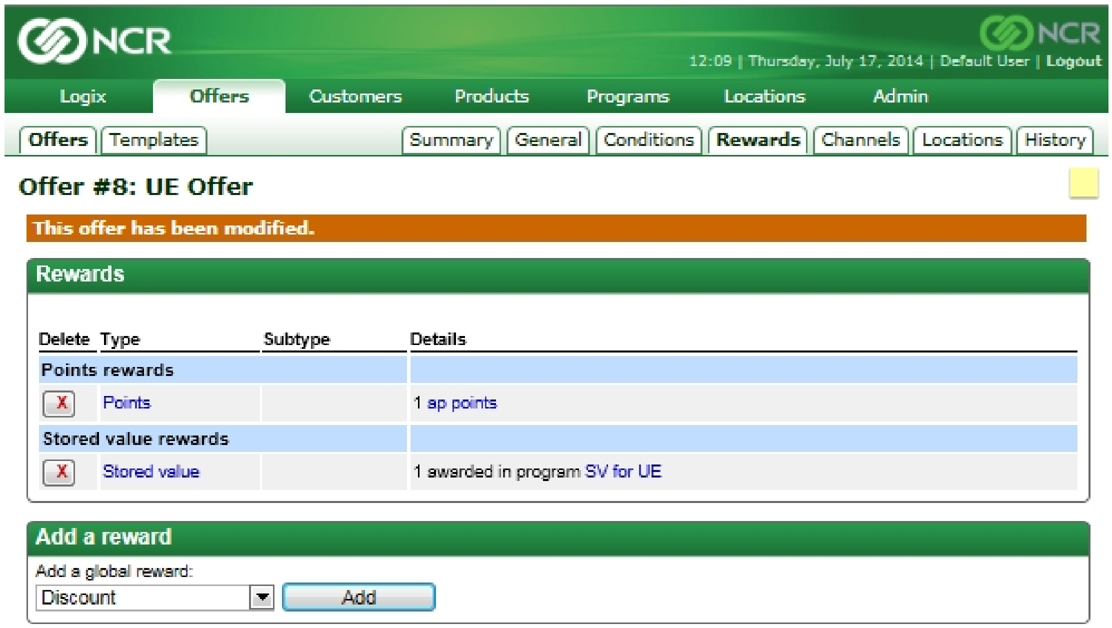


Hello John Smith
You now have ### in your Stored Value accoun
t.
You now have #### in your Points Program acc
ount.
****
Come back before xx/xx/xxxx and earn more po
ints!
Bring this receipt within a week and get an
extra 10% off your entire transaction.

Setting Printed Message Rewards

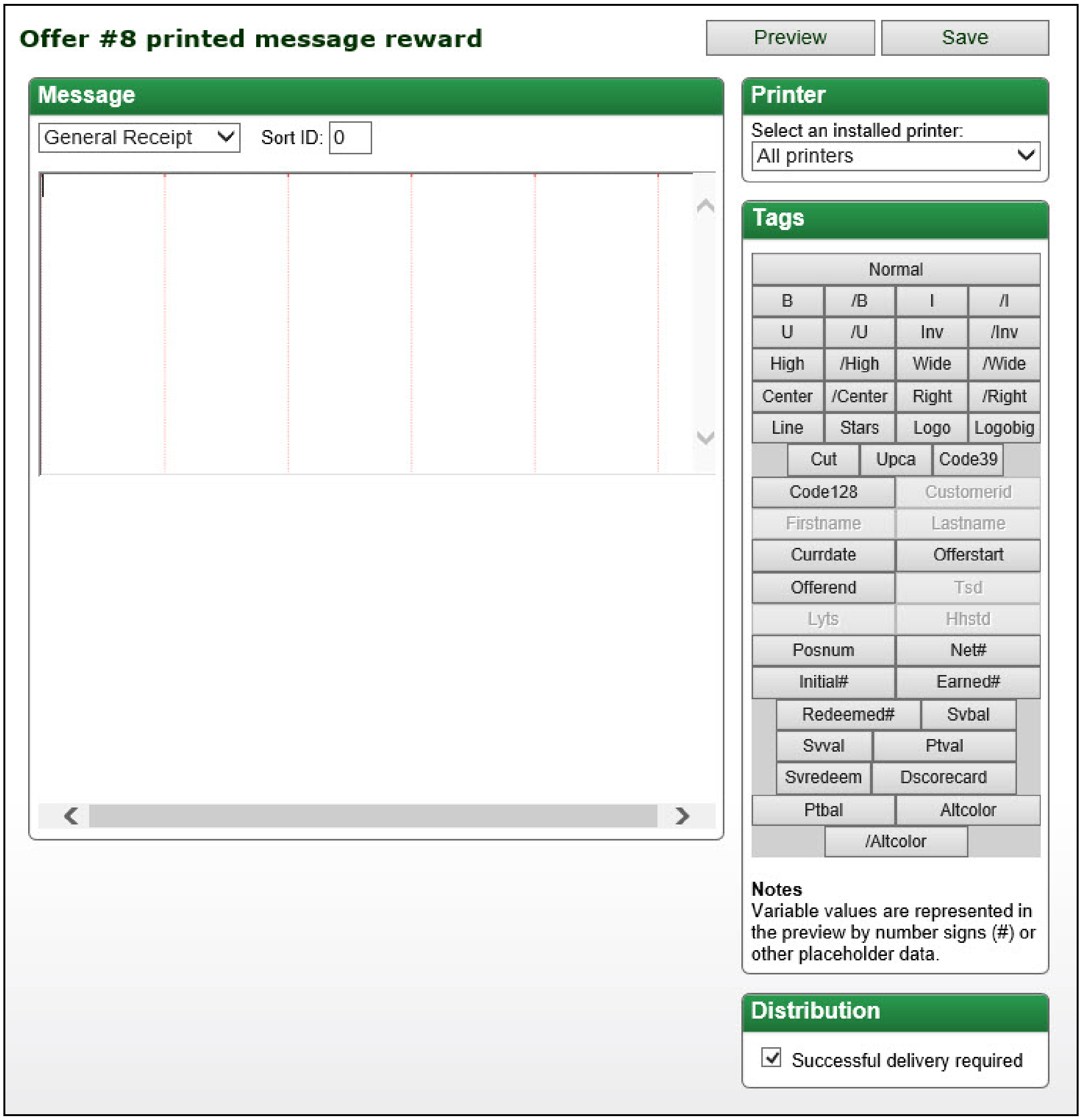
To set printed message rewards, follow these steps:

1. Select any offers from the Offers page and then select the **Rewards** sub–page tab. The Offer Rewards sub–page is displayed.



2. From the Add a global reward drop–down list, select **Printed Message**.

3. Select **Add**. The Printed Message Reward window is displayed.

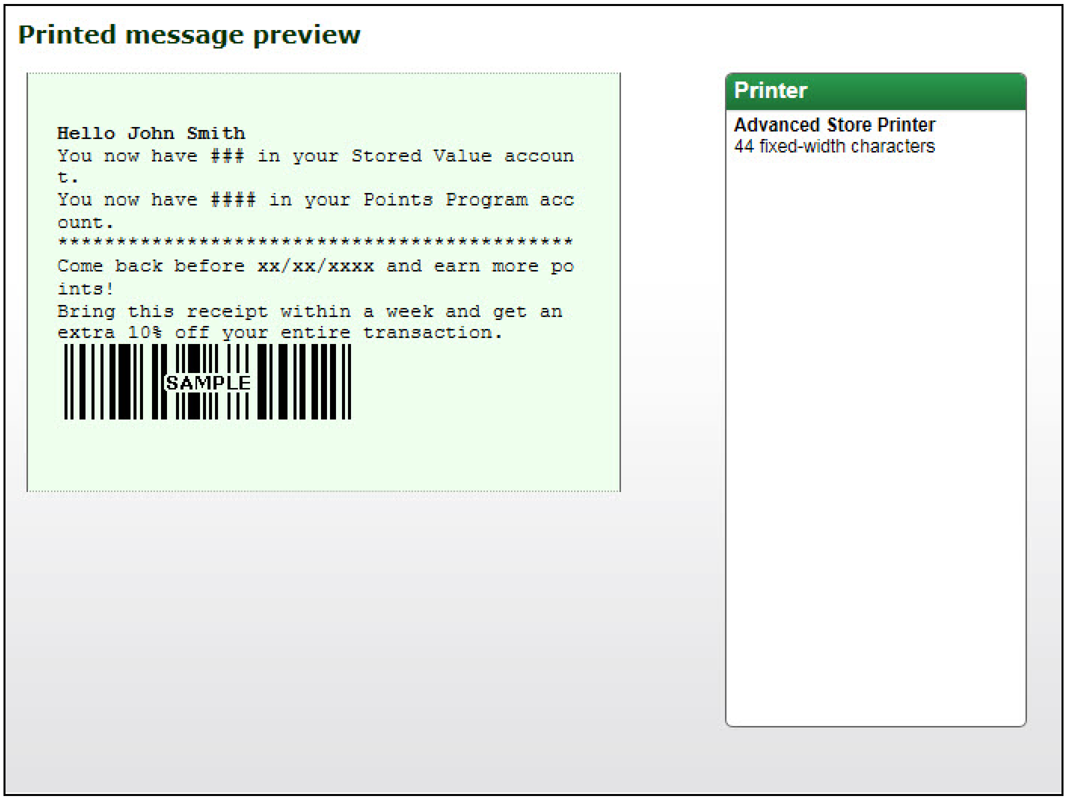


4. Use the following table to set parameters in specific sections:

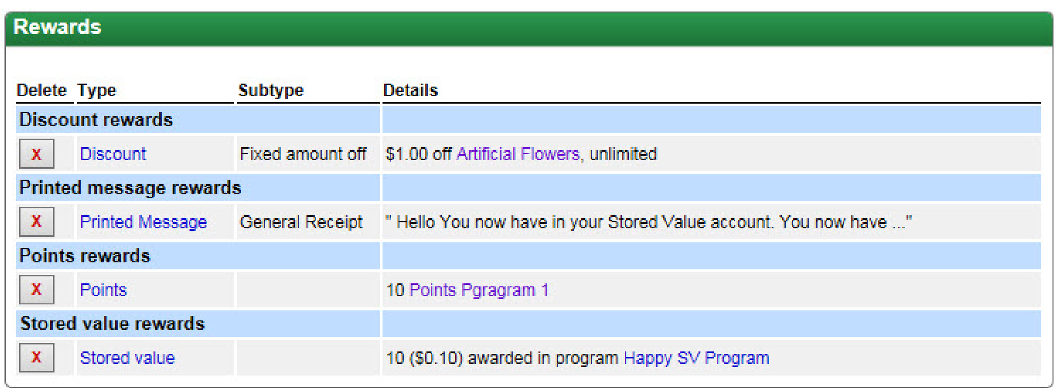
In the section	Do the following:
Message	Enter the text of the message.
Printer	Select a specific printer from which the receipt is printed.
Tags	Use tag buttons to control the text formatting, insert lines or graphics, or insert variable data. For more information, refer to *Message Tags* on page 781.
Distribution	Select the **Successful delivery required** check box to require the reward to be satisfied. Otherwise, if the offer consists of multiple rewards, no other rewards are given unless the delivery of this reward is successful.

5. Do any of the following:

   - Select **Preview**. The application displays an approximation of the printed message in a popup window.



   - Select **Save**. The application displays the Printed Message Reward details in the Offer Rewards sub–page.


Rewards

Delete	Type	Subtype	Details
Discount rewards			
X	Discount	Fixed amount off	$1.00 off Artificial Flowers, unlimited
Printed message rewards			
X	Printed Message	General Receipt	" Hello You now have in your Stored Value account. You now have ..."
Points rewards			
X	Points		10 Points Pgragram 1
Stored value rewards			
X	Stored value		10 ($0.10) awarded in program Happy SV Program

Note: To delete a reward, select the corresponding **X** button.

Cashier Message Reward

Cashier Message Rewards permit users to enter text that is displayed as a cashier message shown on a pole display or other similar device. The following is a sample cashier message.

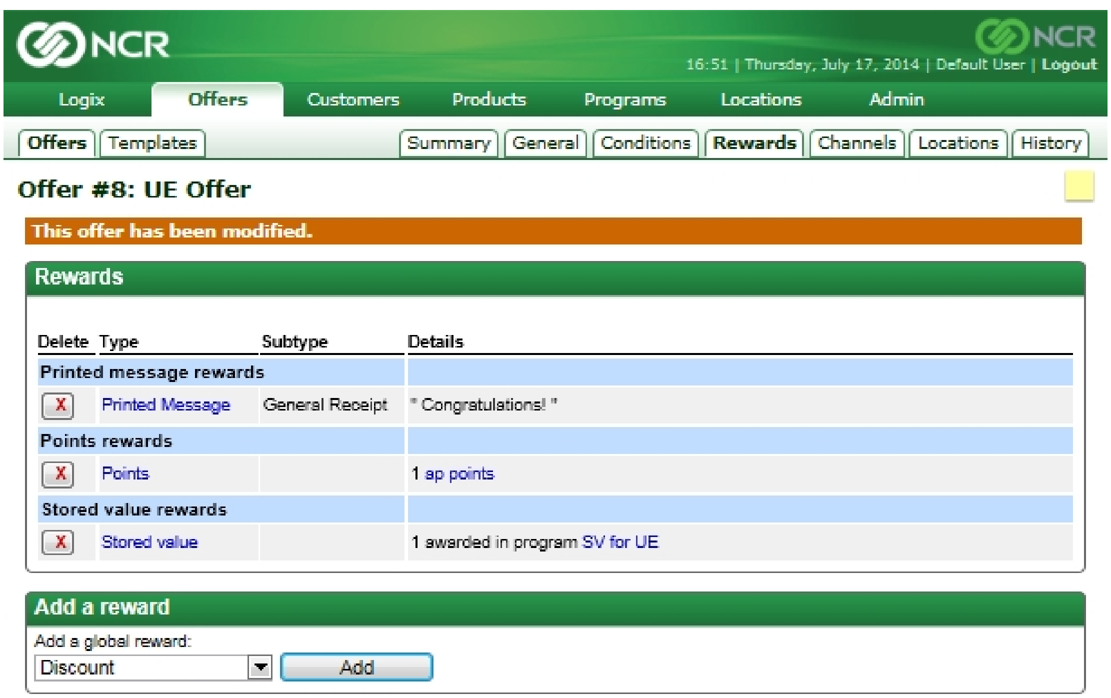
```
Customer has points
expiring ####
```

This section describes how to set Cashier Message Rewards.

Setting Cashier Message Rewards

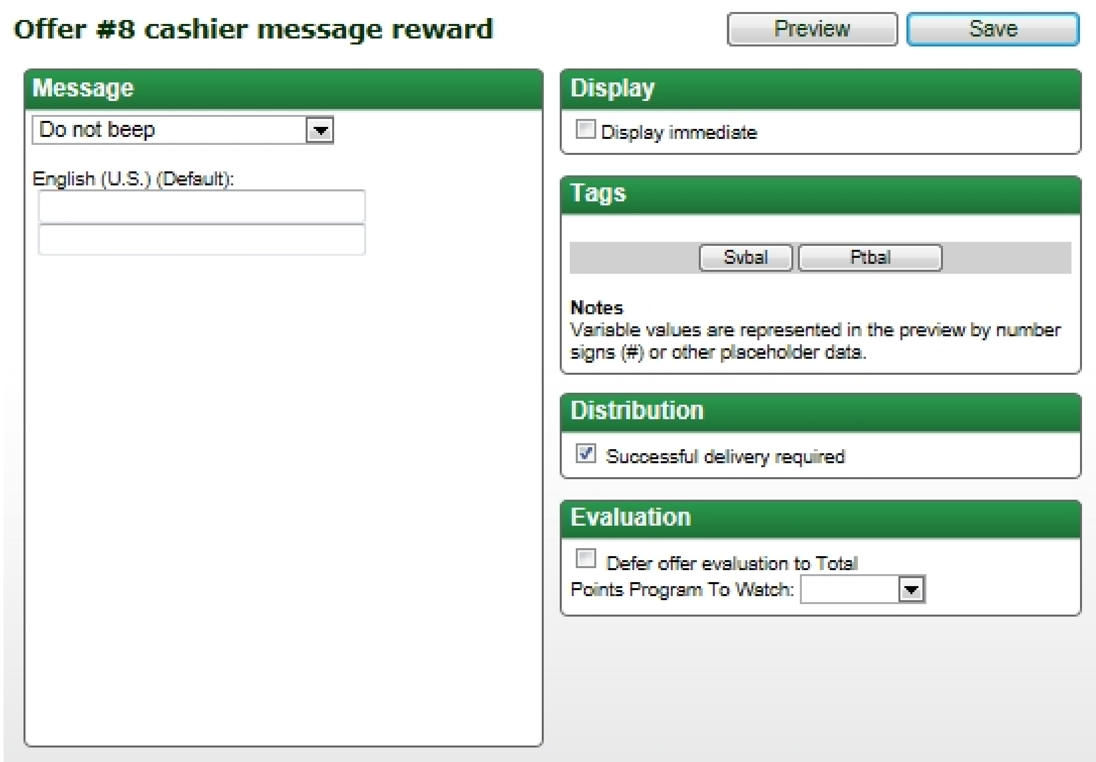
To set cashier message rewards, follow these steps:

1. Select any offers from the Offers page and then select the **Rewards** sub–page tab. The Offer Rewards sub–page is displayed.



2. From the Global Reward drop–down list, select **Cashier Message**.

3. Select **Add**. The Cashier Message Reward window is displayed.

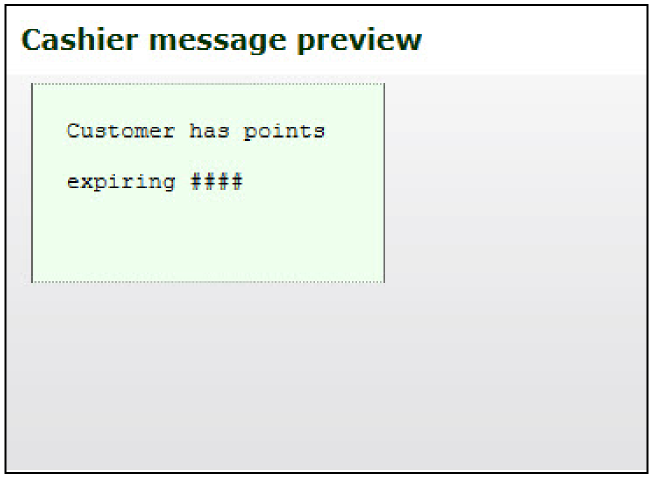


4. Use the following table to set parameters in specific sections:

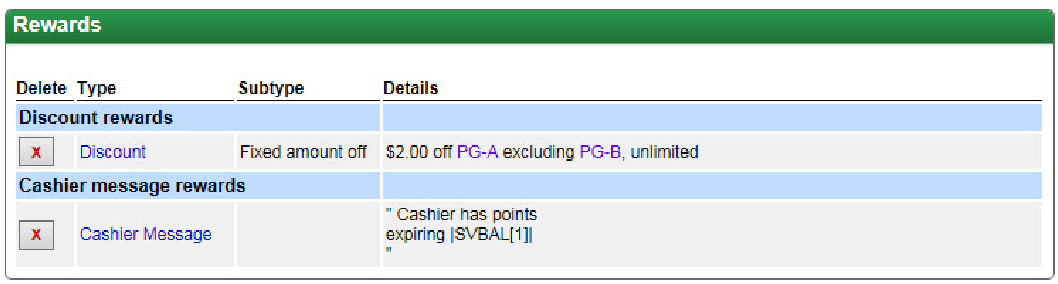
In the section	Do the following:
Message	Enter the message and a corresponding audible beep from the terminal. **Note:** The cashier message can produce a single beep, a beep that persists until cleared by the cashier, or a beep that persists for a set number of seconds.
Display	Select the **Display immediate** check box to immediately award the cashier message (as soon as all conditions are met).
Tags	Use the tag buttons to control the text formatting, insert lines or graphics, or insert variable data. For more information, refer to *Message Tags* on page 781.
Distribution	Select the **Successful delivery required** check box to require the reward to be satisfied. Otherwise, if the offer consists of multiple rewards, no other rewards are given unless the delivery of this reward is successful.
Evaluation	If the **Defer offer evaluation to Total** check box is selected, the cashier message reward is displayed after pressing the Total function at the POS.

5. Do any of the following:

   - Select **Preview**. The application displays an approximation of the printed message in a popup window.



   - Select **Save**. The application displays the Cashier Message Reward details in the Offer Rewards sub–page.



Rewards

Delete	Type	Subtype	Details
Discount rewards			
X	Discount	Fixed amount off	$2.00 off PG-A excluding PG-B, unlimited
Cashier message rewards			
X	Cashier Message		" Cashier has points expiring |SVBAL[1]| "

Note: To delete a reward, select the corresponding X button.

Membership Reward

Membership Rewards permit users to reward customers with membership to a particular customer group. This reward is useful when customers are grouped based on their shopping behavior.

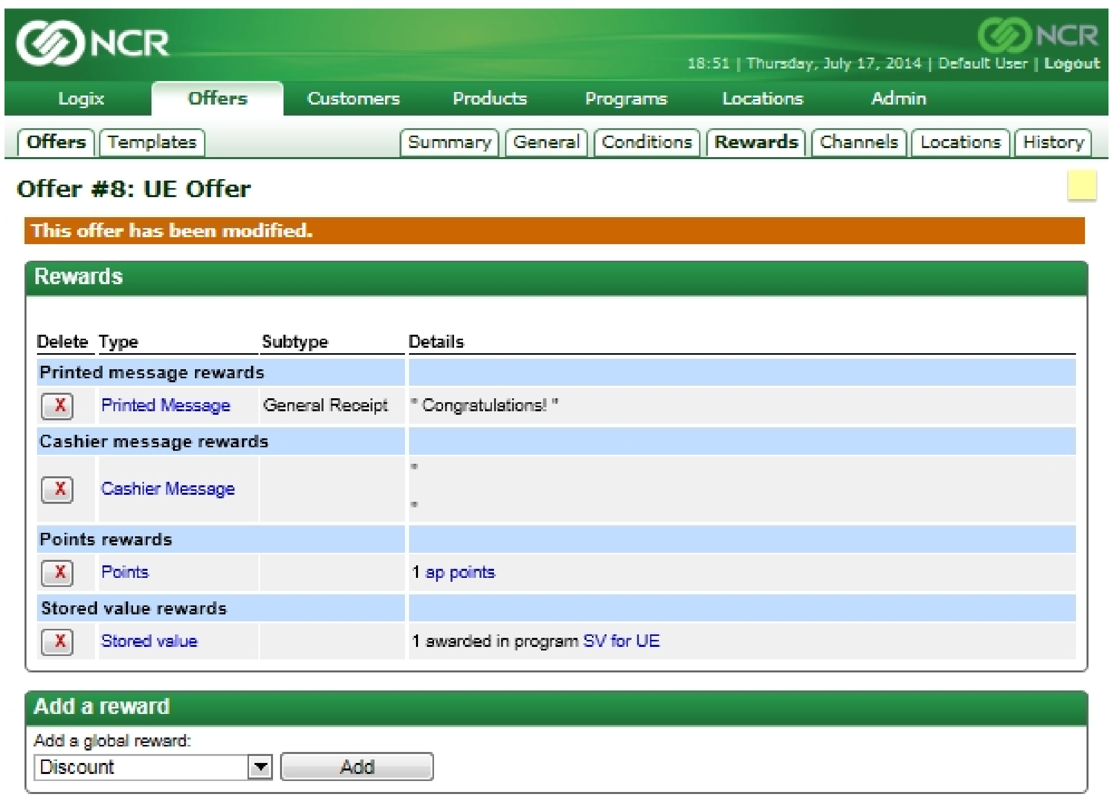
Example: Customers purchasing pet supplies are rewarded with memberships to a pet owners group, which receives special pet–related offers.

This section describes how to set Membership Rewards.

Setting Membership Rewards

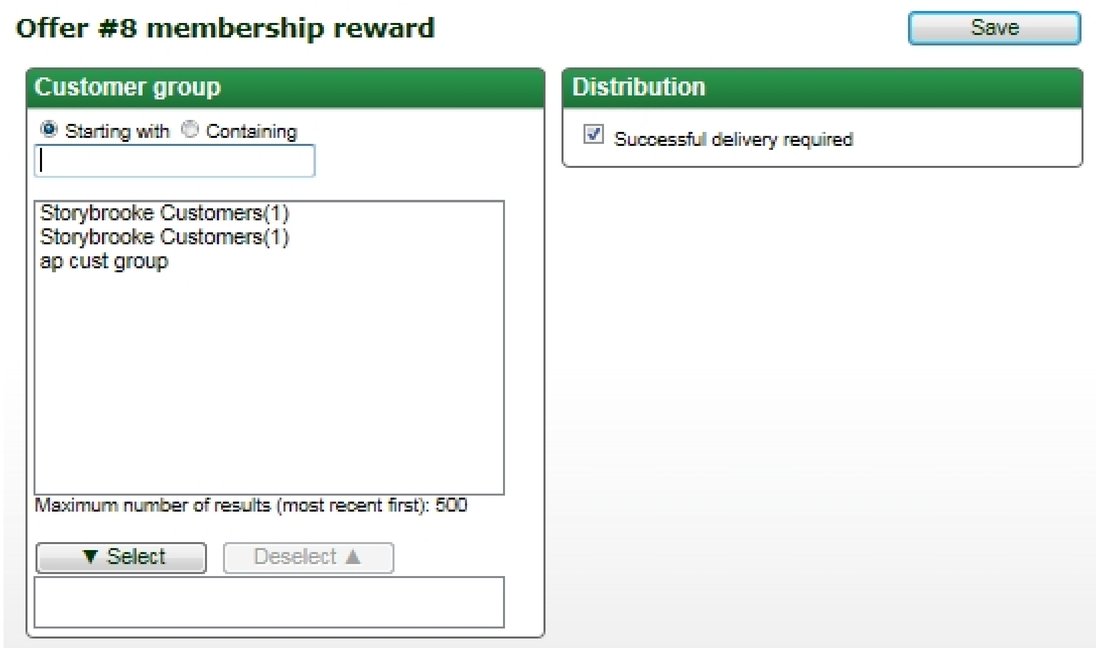
To set membership rewards, follow these steps:

1. Select any offers from the Offers page and then select the **Rewards** sub–page tab. The Offer Rewards sub–page is displayed.



2. From the Global Reward drop–down list, select **Grant Membership**.

3. Select **Add**. The Membership Reward window is displayed.



Note: To create customer groups, refer to *Creating Customer Groups* on page 360.

4. Highlight a customer group name and then, use the **Select** button. The customer group is displayed in the bottom text box.

Note: Offers using UE can require the reward to be satisfied by selecting the **Successful delivery required** check box in the Distribution section. Otherwise, if the offer consists of multiple rewards, no other rewards are given unless the delivery of this reward is successful.

5. Select **Save**. The application displays the Membership Reward details in the Offer Rewards sub–page.

Note: To delete a reward, select the corresponding **X** button.

Purchase with Purchase Reward

Purchase with Purchase Rewards permit customers to buy a product at a discounted price by buying several other products.

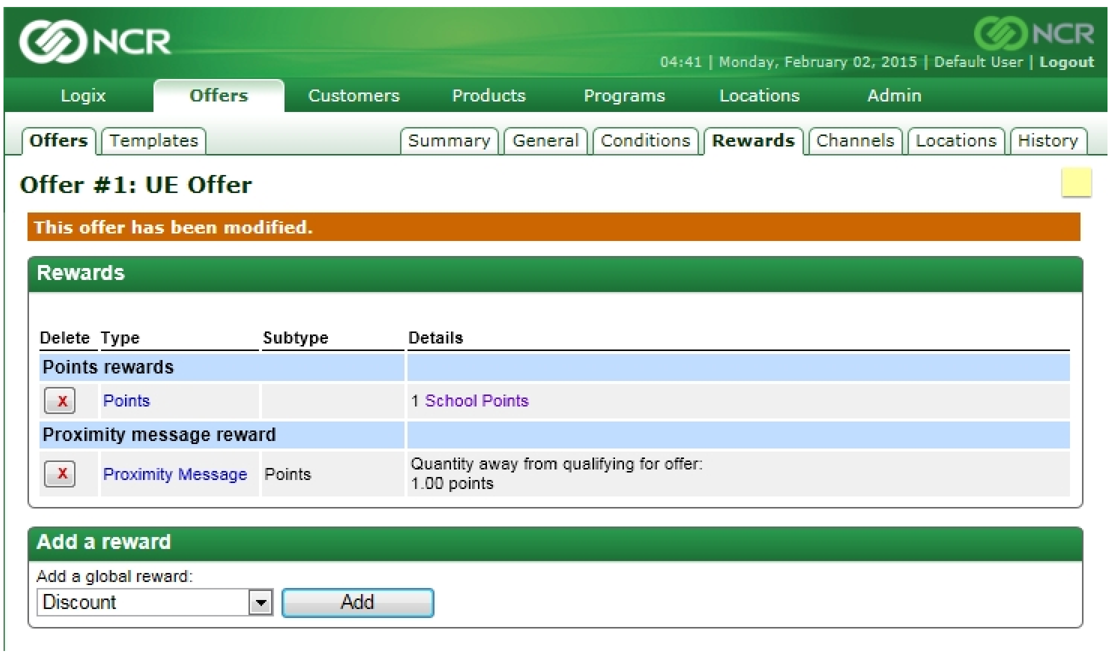
Example: The retailer creates a pet–related offer. If customer buys 3 pet soaps, the customer can buy the pet shampoo at 50% off its price.

This section describes how to set Purchase with Purchase rewards.

Setting Purchase with Purchase Rewards

To set Purchase with Purchase rewards, follow these steps:

1. Select any offers from the Offers page and then select the **Rewards** sub–page tab. The Offer Rewards sub–page is displayed.

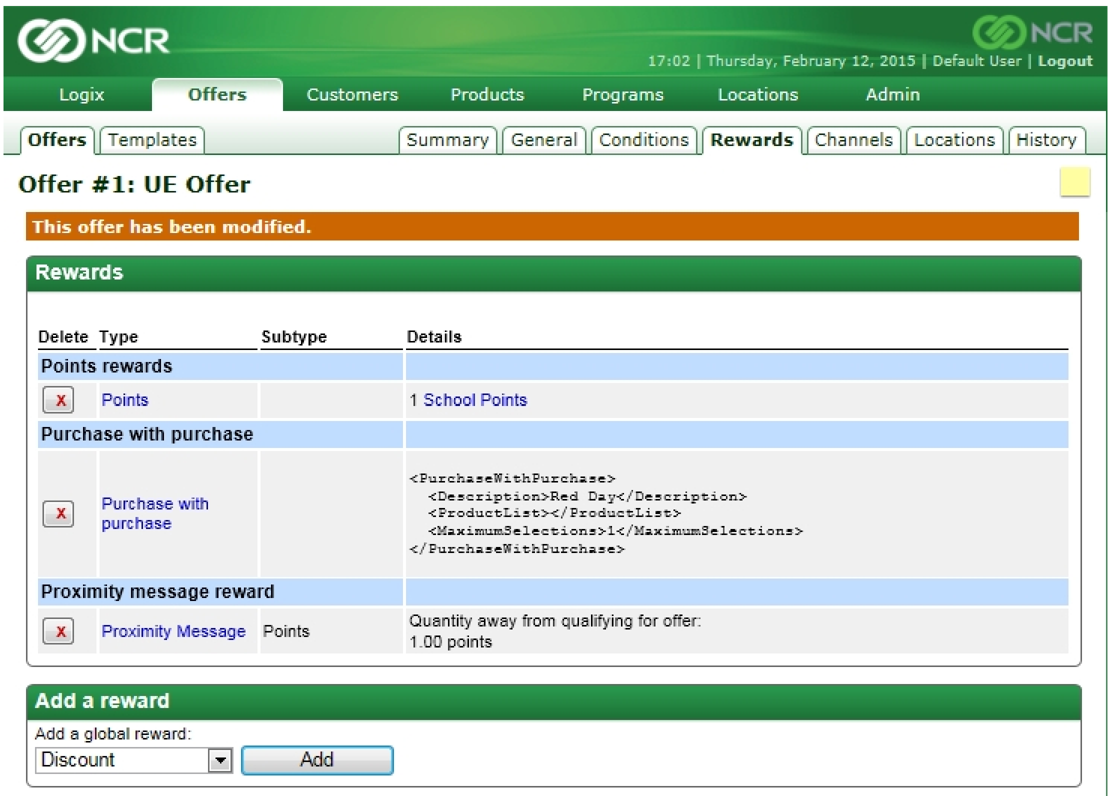


2. From the Add a global reward drop–down list, select **Purchase with purchase**.
3. Select **Add**. The Purchase with Purchase window is displayed.

The Purchase with Purchase window displays the following fields:

- **Description**—text message describing the reward.
- **Product List**—list of product numbers. Multiple products are separated by commas.
- **Maximum Selections**—limit on the number of product selections. Logix permits a maximum of 99 selections.

4. Enter information in the corresponding fields.
5. Select **Save**. The application displays the Purchase with Purchase details in the Offer Rewards sub–page.



Gift with Purchase Reward

Gift with Purchase rewards permit retailers to reward customers with one or more gift items from the choices provided to them after an offer condition is satisfied.

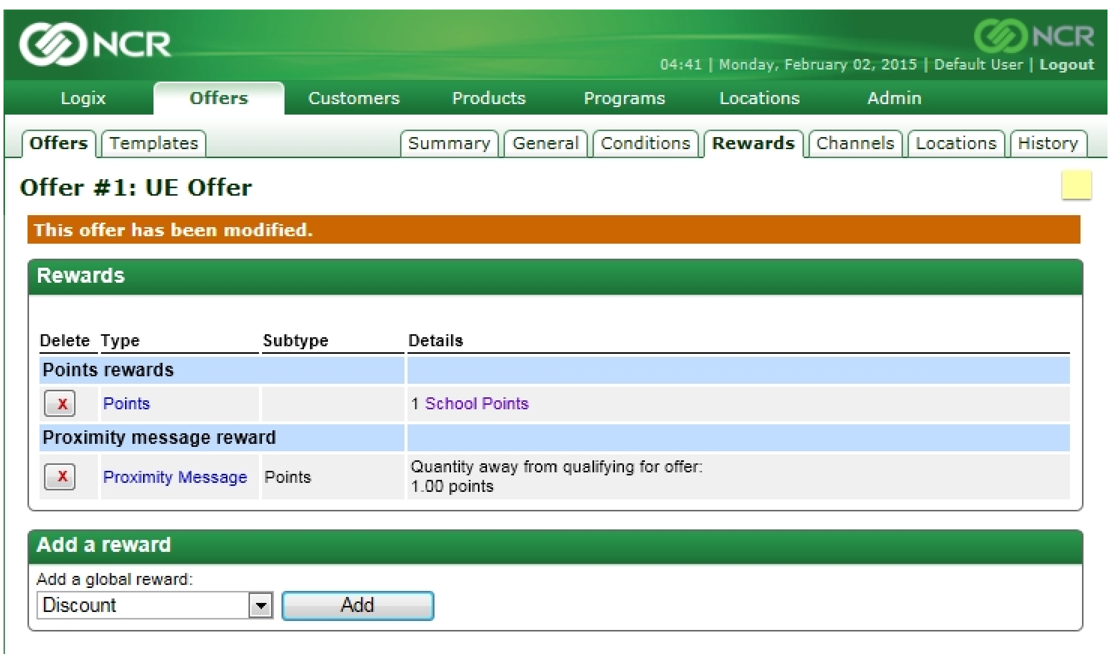
Example: The store is celebrating its 10th year anniversary. A retailer creates an offer that rewards customers with one merchandise item (customer can choose between a t–shirt, a pen, a cap, and a mug) bearing the store's logo for free if the customer's purchase reaches a total amount of $10.

This section describes how to set Gift with Purchase rewards.

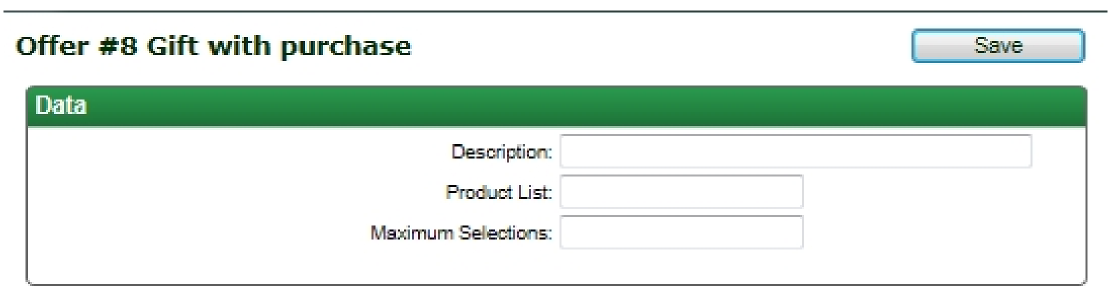
Setting Gift with Purchase Rewards

To set Gift with Purchase rewards, follow these steps:

1. Select any offers from the Offers page and then select the **Rewards** sub–page tab. The Offer Rewards sub–page is displayed.



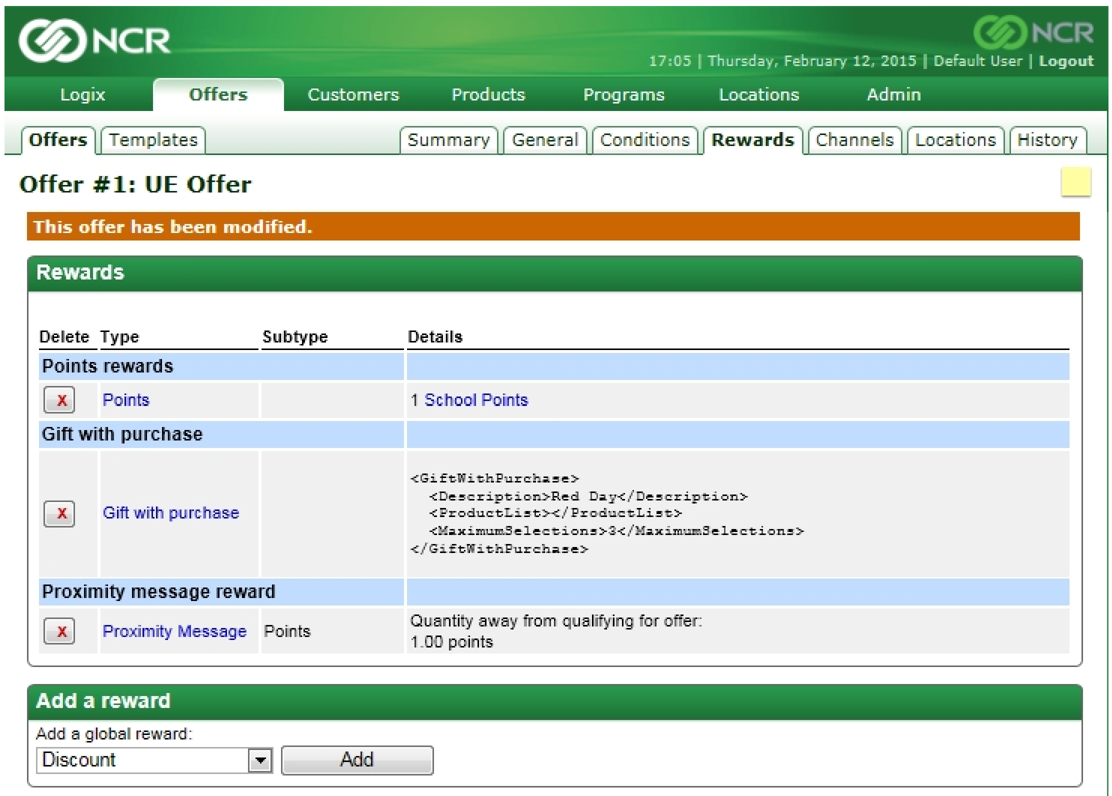
2. From the Add a global reward drop–down list, select **Gift with purchase**.
3. Select **Add**. The Gift with Purchase window is displayed.



The Gift with Purchase window displays the following fields:

- **Description**—text message describing the reward.
- **Product List**—list of product numbers. Multiple products are separated by commas.
- **Maximum Selections**—limit on the number of product selections. Logix permits a maximum of 99 selections.

4. Enter information in the corresponding fields.
5. Select **Save**. The application displays the Gift with Purchase details in the Offer Rewards sub–page.



Gift Card Rewards

Gift Card rewards permit retailers to reward customers with a gift card that is loaded with a monetary value. When used in a transaction, the discount amount of the card may be deducted as a fixed amount from the price of the items or as a percentage of the price of the items.

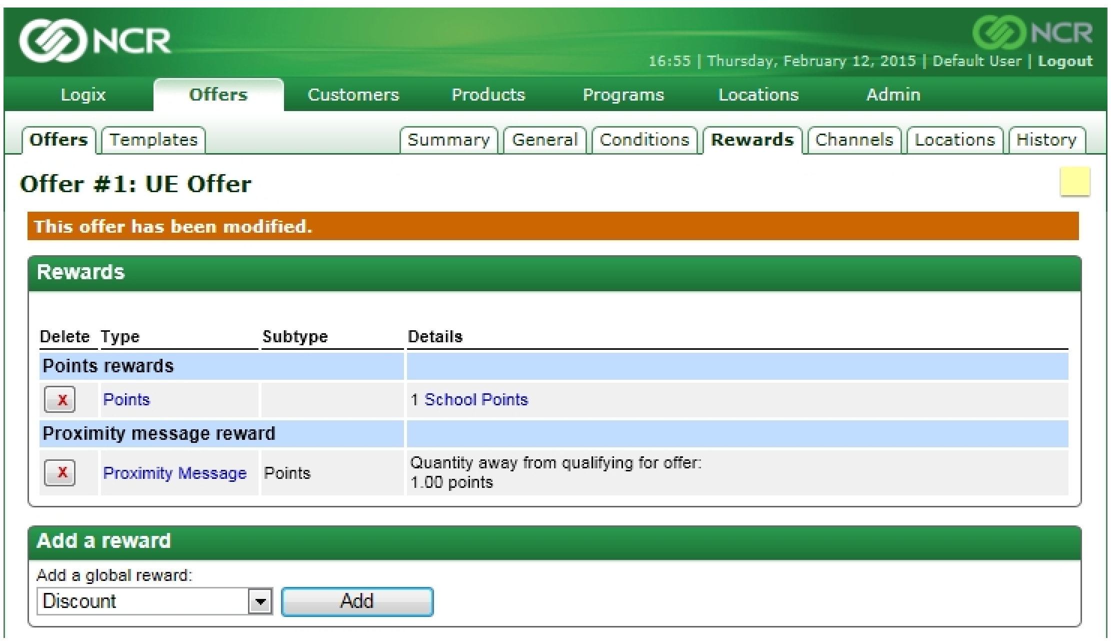
Example: The store is celebrating its 5th year anniversary. The retailer creates an offer that rewards customers with a $5 gift card when the customer purchases 5 items from product group PG–A.

This section describes how to set Gift Card rewards.

Setting Gift Card Rewards

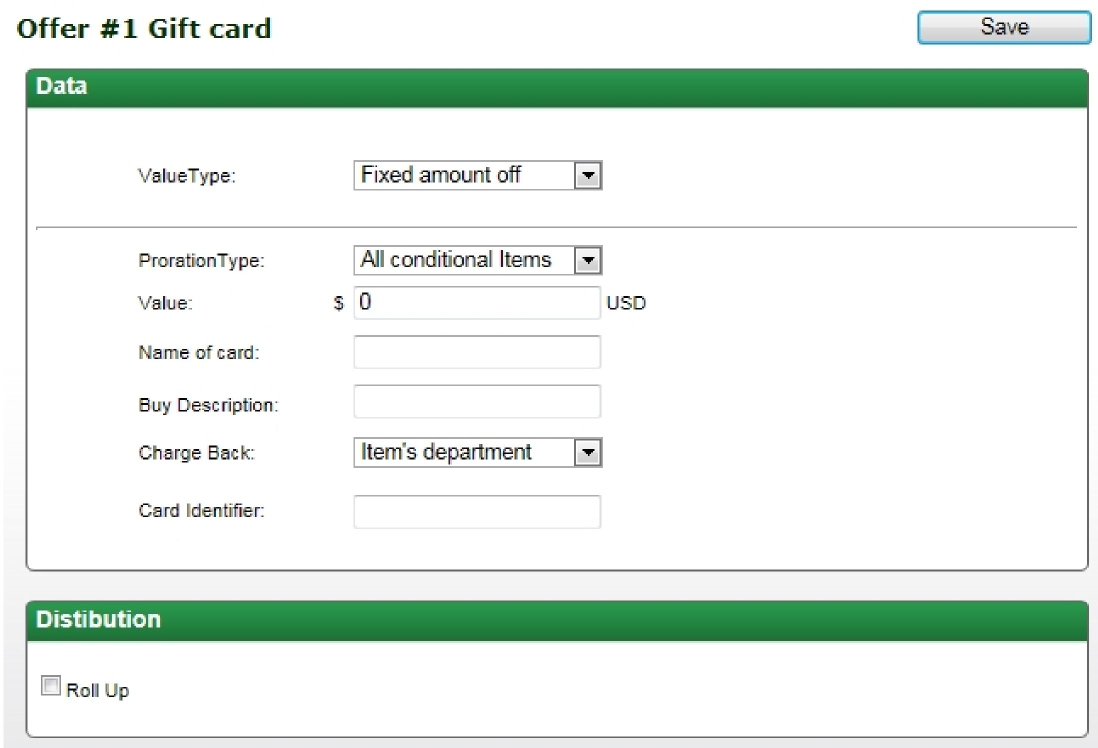
To set Gift with Purchase rewards, follow these steps:

1. Select the **Rewards** sub–page tab, the Offer Rewards sub–page is displayed.



2. From the Add a global reward drop–down list, select **Gift card**.

3. Select **Add**. The Gift card window is displayed.

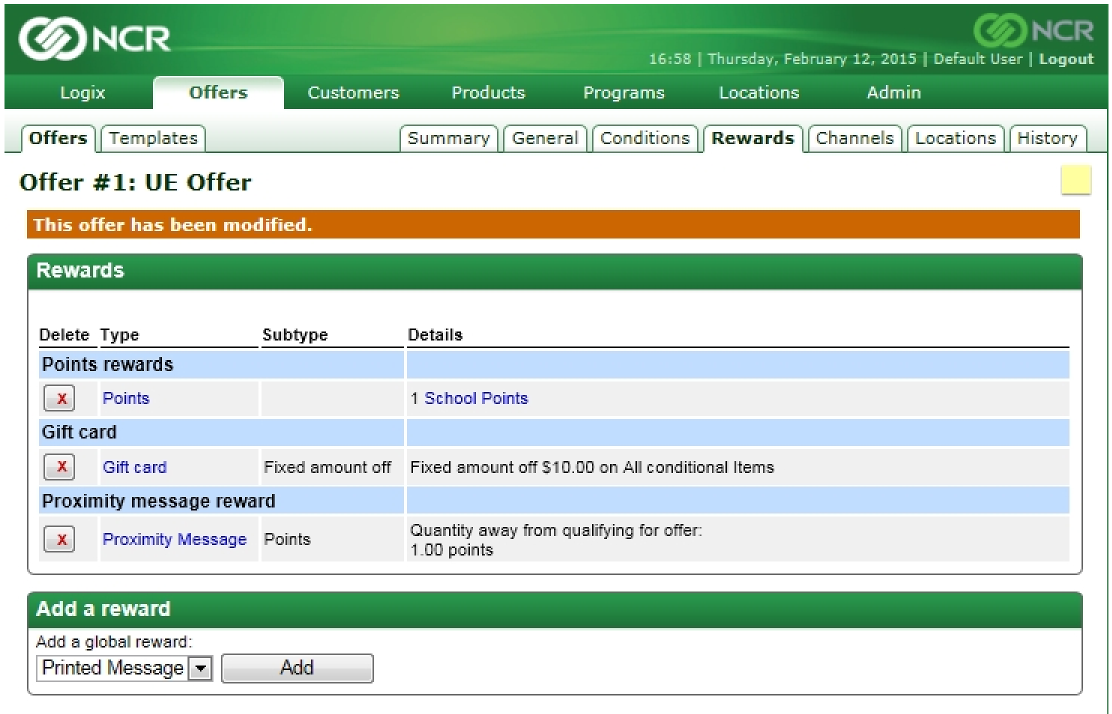


4. Enter the values in the corresponding fields using the following table for reference:

Parameter	Description
Value Type	Controls the type of discount received by customers as a gift card based on the following discount types: • **Fixed amount off**—deducts a fixed amount from the price of items in the selected product group or conditional items. • **Percent off**—deducts a percentage from the price of items in the selected product group or conditional items.
Proration Type	Controls the items considered in prorating the discount amount given as gift card based on the following the proration types: • **All Conditional Items**—the discounted amount given away as gift card will be prorated across all the items belonging to the conditional product group. **Example:** **Offer:** Buy 5 items from product group A, and get $10 gift card with all conditional items as the proration type.

Parameter	Description
	Transaction: 8 items from product group A are scanned. **Result:** Gift card of $10 is rewarded because the offer condition is met once; and the $10 gift card amount is prorated across all the 8 items of the conditional product group. • **Minimum Conditional Items**—the discounted amount given away as gift card will be prorated only on the conditional items due to which the offer is availed. **Example:** **Offer:** Buy 5 items from product group A, and get 10$ gift card with minimum conditional items as the proration type. **Transaction:** 8 items from product group A are scanned. **Result:** Gift card of $10 is rewarded because the offer condition is met once; and the $10 gift card amount is prorated only across the 5 items of the conditional product group.
Value	Specifies the amount to be awarded as the gift card.
Name of card	Card detail used by retailers in awarding the gift card.
Buy Description	Card detail used by retailers in awarding the gift card.
Chargeback	Permits retailers to set the department against which the gift card amount can be charged. By selecting a chargeback department, retailers can track the gift cards given away in relation to a specific store department or group. For more information, refer to *Creating Chargeback Departments* on page 1.
Card Identifier	Card detail used by retailers in awarding the gift card.
Roll Up	If selected, indicates a rollup flag for issuance of either a single or multiple gift cards.

5. Select **Save**. The application displays the Gift with Purchase details in the Offer Rewards sub–page.



Proximity Message Reward

The Proximity Message Reward permits users to alert customers how much more items they need to purchase, amount they need to spend, or points they need to reach to get a reward.

To create a Proximity Message Reward, ensure that the offer has at least one existing reward. This section describes each Proximity Message reward parameter in the Proximity Message reward window.

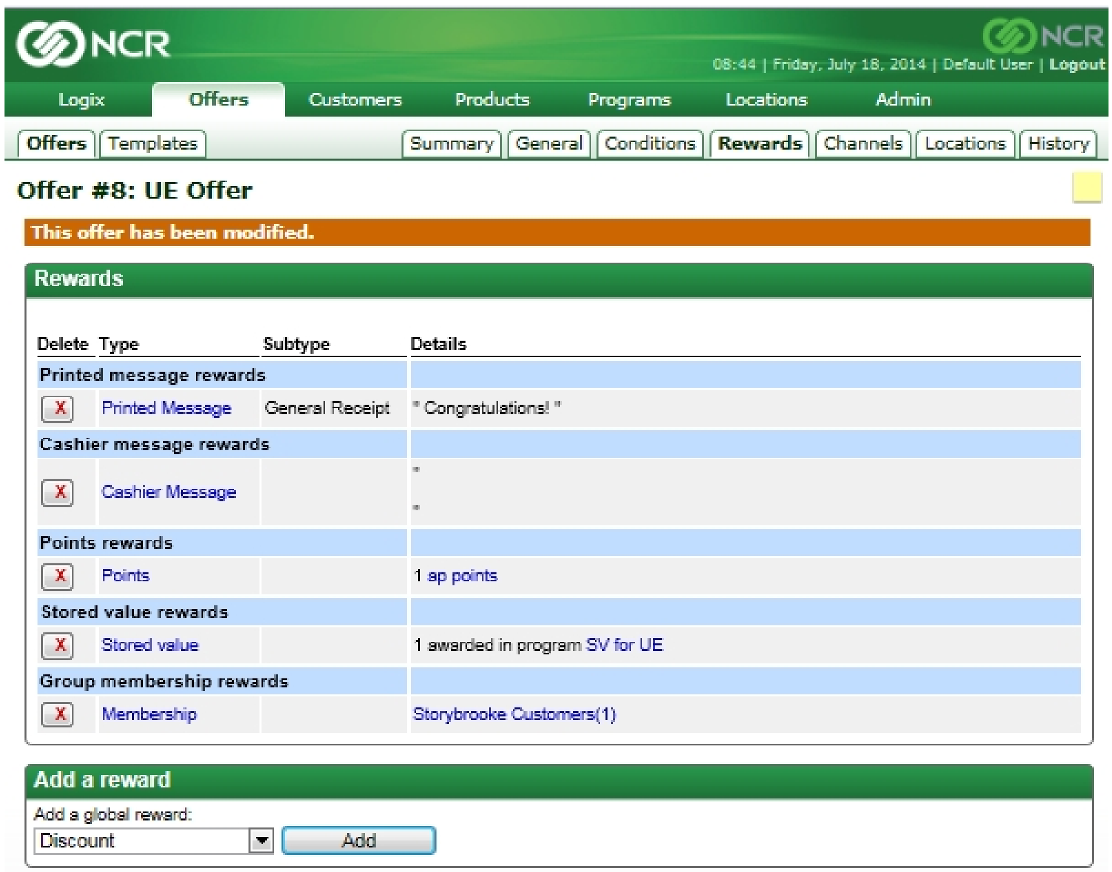
Fields	Description
Message Type	Displays the following types of proximity that can be set for the offer: • **Items—**permits customers to see the proximity reward based on the number of items they need to purchase in order to avail an offer. **Note:** This option is only available in the drop–down list when a discount is set as an offer reward. • **Amount**—permits customers to see the proximity reward based on the amount of money they need to reach in order to avail an offer. **Note:** This option is only available in the drop–down list when a discount is set as an offer reward. • **Points**—permits customers to see the proximity reward based on the points they need to reach in order to avail an offer. **Note:** This option is only available in the drop–down list when a points program is set as an offer reward.
Data	Displays the following options: • **# required to earn the offer**—provides information of the items, amount, or points required to earn the offer. **Note:** This field is disabled. It is populated from the offer conditions. • **# away from qualifying for offer**—used to configure the items, amount, or points threshold value from where the proximity reward is rewarded. Based on the entered value, a text message is displayed indicating the threshold value to trigger the reward.
Tags	Used to create the proximity message which is displayed to the customer. **Note:** The "# required" tag should be used in the message which is further used by the engine to display the appropriate value.

Example: An offer rewards a customer with a gift card with a $10 fixed amount monetary value if customer purchases a quantity of 10 items from product group A. The offer has a proximity message reward set that is displayed when the transaction is 2 items away from getting the gift card reward. At the check–out counter, after 8 items from product group A is scanned, the proximity message, "You are 2 items away to get a gift card" is displayed.

Setting Proximity Message Rewards

To set Proximity Message rewards, follow these steps:

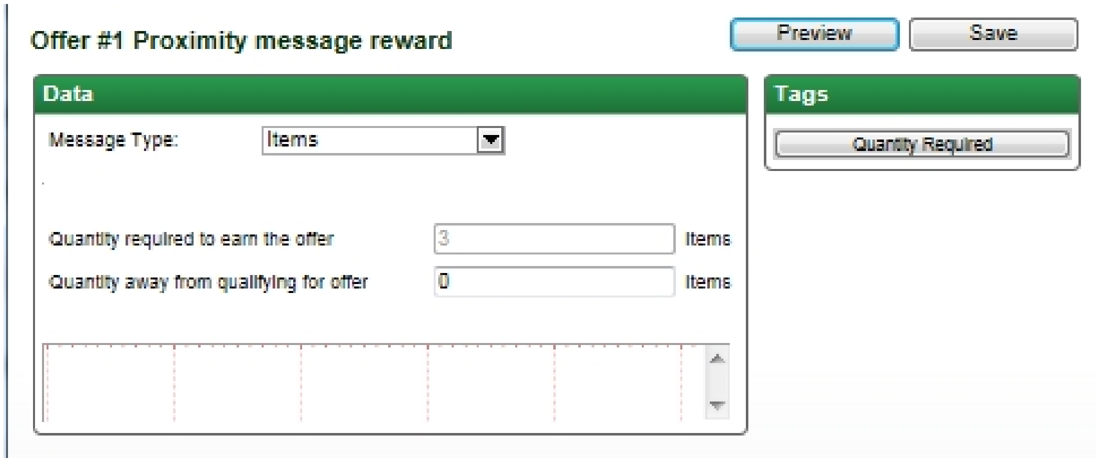
1. Select any offers from the Offers page and then select the **Rewards** sub–page tab. The Offer Rewards sub–page is displayed.



2. From the Add a global reward drop–down list, select **Proximity Message**.

Note: Ensure that the Product condition set in the offer is more than one in order to display the Proximity Message option in the Add a global reward drop–down list.

3. Select **Add**. The Proximity Message window is displayed.

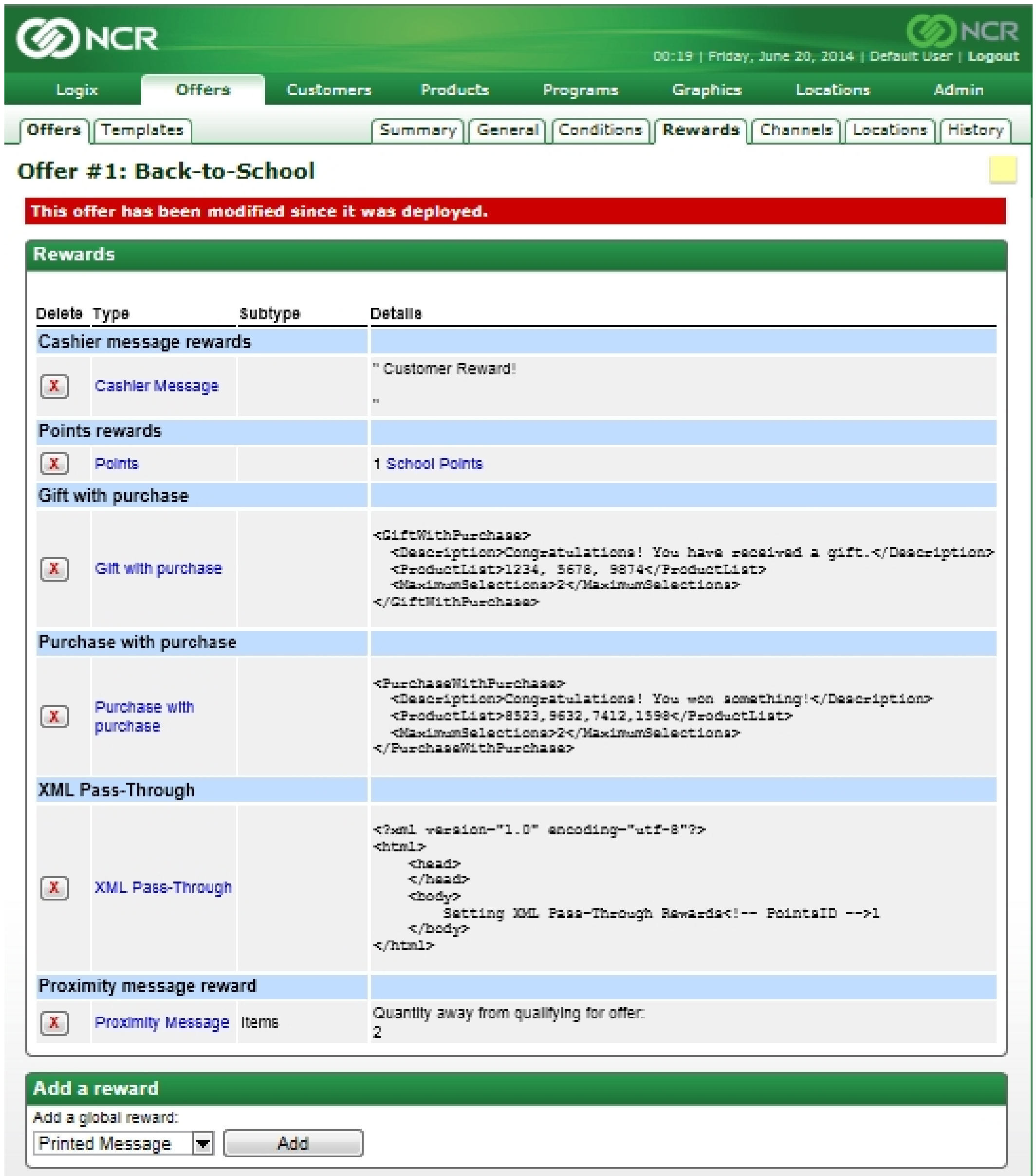


4. Use the following table to set parameters in specific sections:

In the section	Do the following:
Data	1. In the Message Type drop–down list, set the proximity type. 2. Enter the corresponding value in the **Quantity away from qualifying for offer** field.
Tags	Select the **Quantity Required** button to create the proximity message that is displayed to the customer. **Note:** Ensure that the "# required" tag is used in the message which is further used by the engine to display the appropriate value.

3. Enter the values in the corresponding fields.

4. Do any of the following:
   - Select the **Preview**. The application dislays an approximation of the message in a popup window.
   - Select **Save**. The application displays the Proximity Message details in the Offer Rewards sub–page, as shown in the following example:



Monetary Stored Value Redemption Rewards

Monetary Stored Value Redemption rewards permit users to add stored value programs from which customers are allowed to redeem as tender.

Example: A retailer creates an offer where customers belonging to the customer group CG–A can use their stored value points from the SV–1 program as tender. An eligible customer purchases a total of $25 in the transaction. The POS operator informs the customer that he has a total of 5000 stored value points from the SV–1 program, which is equivalent to 50 bonus dollars when converted, that he can use as a tender. The customer can then choose to redeem part or all of the bonus dollars as non–prorated tender in the transaction. The redeemed amount is applied towards the total transaction and the new total is displayed to the customer.

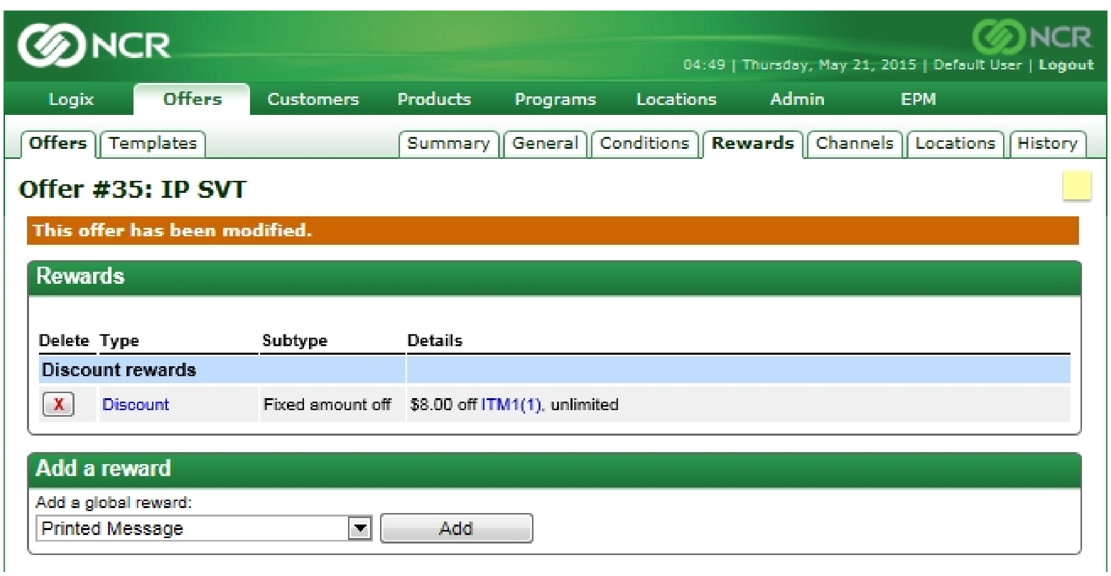
This section describes how to set Monetary Stored Value Redemption rewards.

Note: The Monetary Stored Value Redemption feature is only available if the customer condition is set to a specific customer group. For more information, refer to *Setting Customer Conditions* on page 195.

Setting Monetary Stored Value Redemption Rewards

To set Monetary Stored Value Redemption rewards, follow these steps:

1. Select any offers from the Offers page and then select the **Rewards** sub–page tab. The Offer Rewards sub–page is displayed.

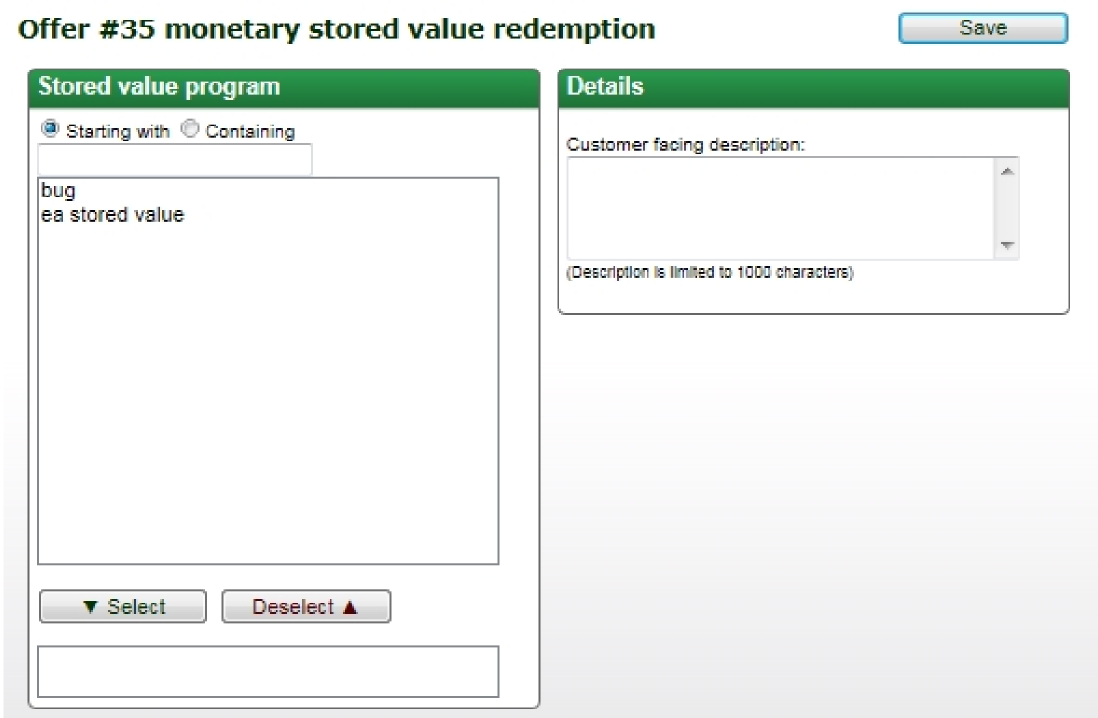


Note: An offer can be associated with only one Monetary Stored Value Redemption reward.

2. From the Add a global reward drop–down list, select **Monetary Stored Value Redemption**.

Note: If the Monetary Stored Value Redemption option is not displayed, ensure that the Customer condition is configured with a specific customer group. For more information, refer to *Setting Customer Conditions* on page 195.

3. Select **Add**. The Monetary Stored Value Redemption window is displayed.

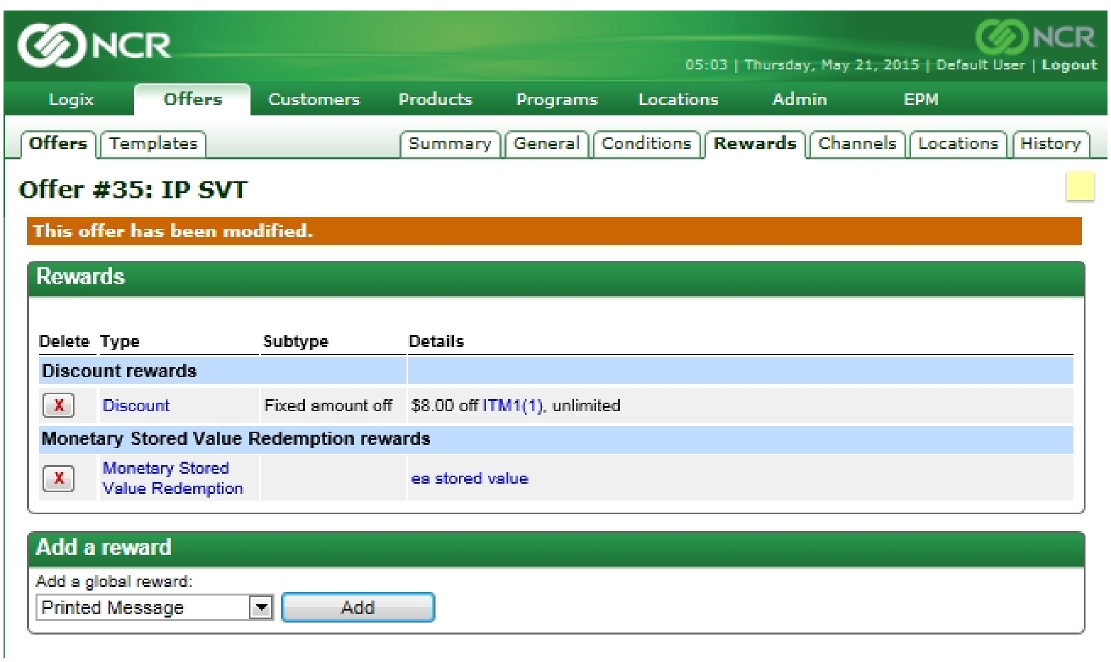


Note: Only cents–off type stored value programs are displayed in the list box. For more information, refer to *Creating Stored Value Programs* on page 496.

4. Enter the values in the corresponding fields using the following table for reference:

Section	Do the following:
Stored Value Program	Highlight a stored value program and then, use the **Select** button to set the program as the reward. The selected program is displayed in the bottom text box. **Note:** A stored value program that is used as a monetary stored value redemption reward in an offer, cannot be used in another offer as a monetary stored value redemption reward.
Details	Enter the description of the stored value program that can be used by customers as tender. It is also the description displayed to the customers at the POS. **Note:** The description entered in this text box also updates the description in the corresponding Stored Value Program Edit sub–page, and vice versa. For more information, refer to *Creating Stored Value Programs* on page 496.

5. Select **Save**. The application displays the Monetary Stored Value Redemption details in the Offer Rewards sub–page.



XML Pass–Through Reward

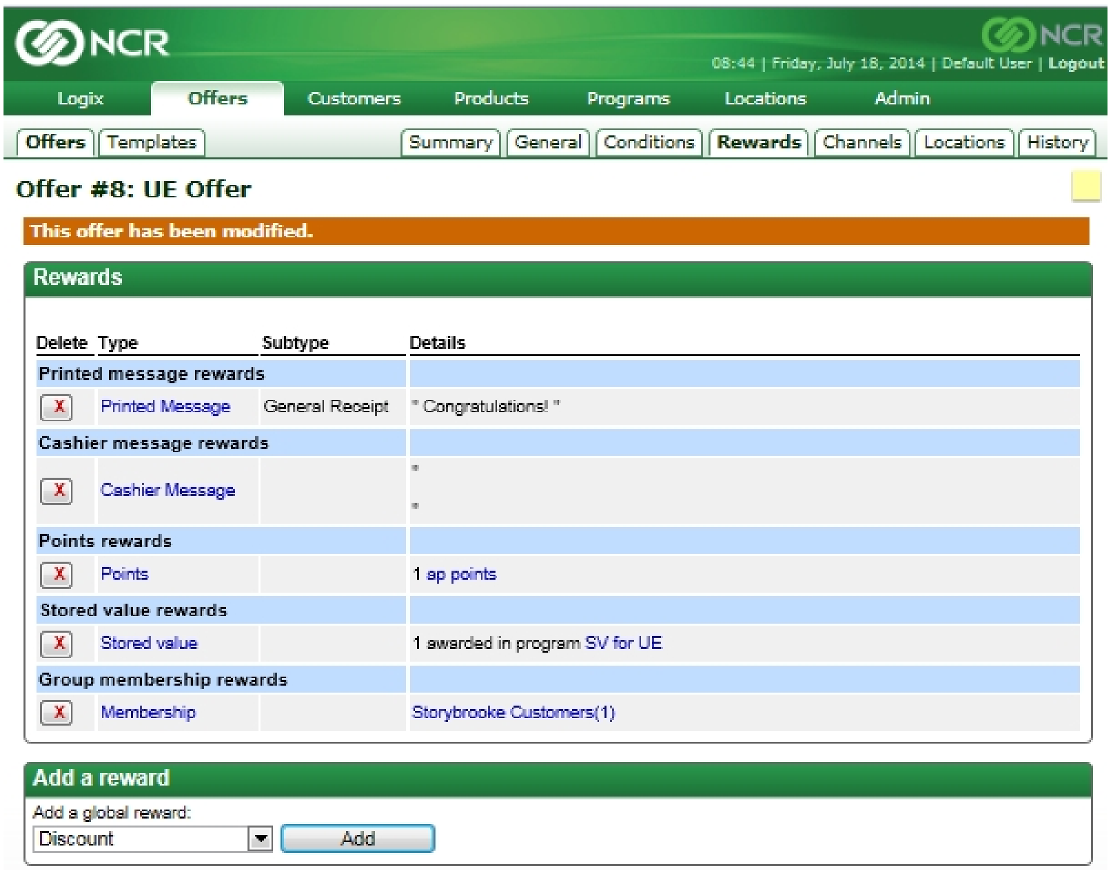
XML Pass–Through rewards permit customers to choose gifts from a list of products when an offer condition is satisfied. This section describes how to set XML Pass–Through rewards.

Note: Only one XML Pass–Through reward per offer is allowed.

Setting XML Pass–Through Rewards

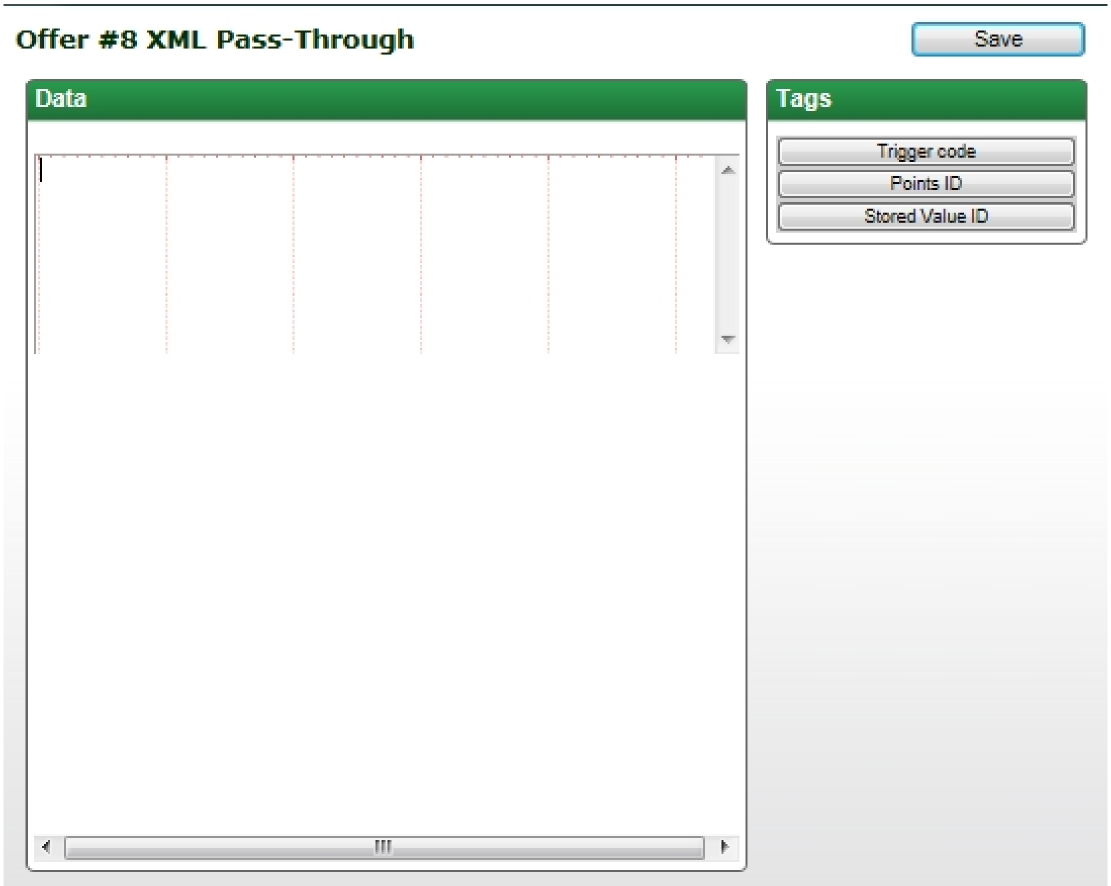
To set XML Pass–Through rewards, follow these steps:

1. Select any offers from the Offers page and then select the **Rewards** sub–page tab. The Offer Rewards sub–page is displayed.



2. From the Add a global reward drop–down list, select **XML Pass–Through**.

3. Select **Add**. The XML Pass–Through window is displayed.

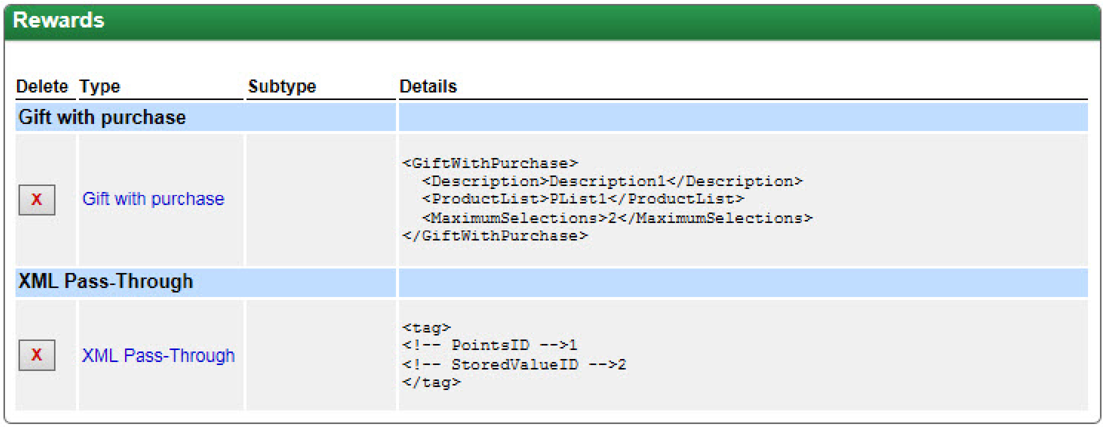


4. Enter information in the Data section.

Note: Logix accepts information only in XML format for this reward type.

5. In the Tags section, select any of the following tag types:
   - **Trigger code**—displays a list of trigger codes that can be associated with the reward. For more information, refer to *Accessing UE Settings* on page 729.
   - **Points ID**—displays a list of points program names. The ID number that is associated with the program name is added to the XML message — not the program name.
   - **Stored Value ID**—displays a list of stored value program names. The ID number that is associated with the program name is added to the XML message — not the program name.

6. Select **Save**. The application displays the XML Pass–Through Reward details in the Offer Rewards sub–page.



Trackable Coupon Reward

Trackable Coupon Rewards grant customers dynamically generated unique coupons when the transaction satisfies the set condition. The coupons that are rewarded to the customers are added to the specified trackable coupon program. The coupons are generated only after the transaction is complete. Retailers may create multiple trackable coupon rewards in a single offer.

Example: The retailer creates an offer that rewards customers with a $5 Off Next Purchase Coupon when the customer purchases a total of $50 in a single transaction. For multiple trackable coupon rewards, the retailer may reward the same customer with another coupon, the 10% Off Ladies Shoes Coupon.

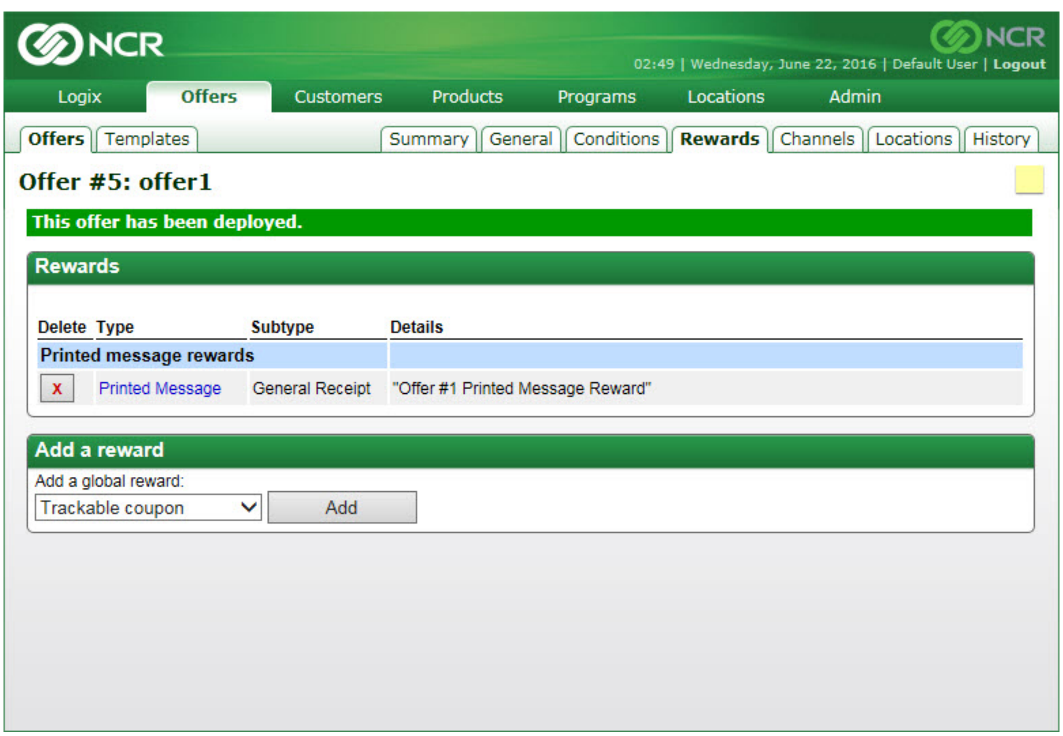
Note: If the coupon pattern set in the system has only five coupons left, and a customer is eligible for six or more coupons, the system partially rewards the customer with only five coupons.

For information about trackable coupon programs, refer to *Trackable Coupon Programs* on page 503. For more information about the coupon options, refer to *Coupon Service* on page 812.

Setting Trackable Coupon Rewards

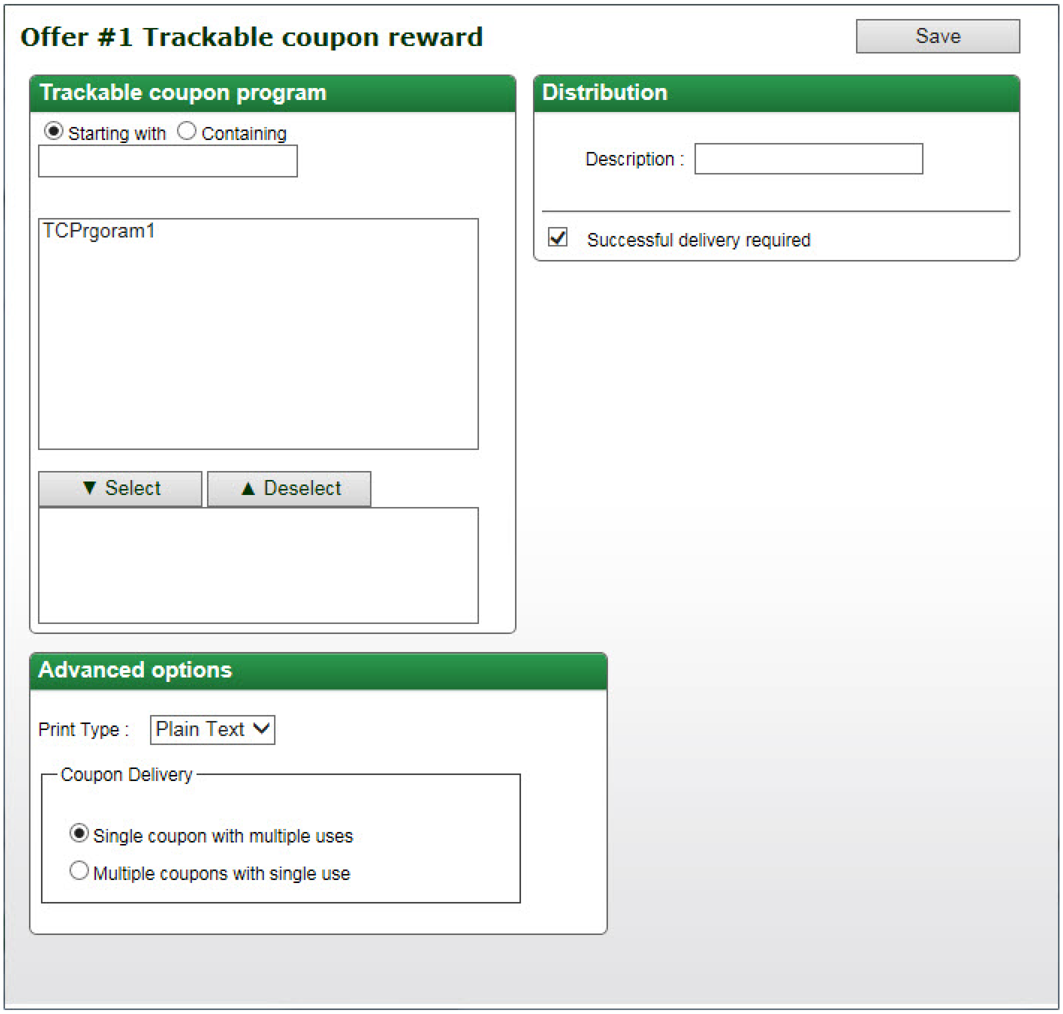
To set trackable coupon rewards, follow these steps:

1. Select any offer from the Offers page and then select the **Rewards** sub–page tab. The Offer Rewards sub–page is displayed.



2. From the Global Reward drop–down, list, select **Trackable coupon**.

3. Select **Add**. TheTrackable coupon reward window is displayed, as shown in the following example:



4. Use the following table to set parameters in specific sections:

In the section	Do the following:
Trackable coupon program	Highlight a Trackable coupon program and then, use the **Select** button to specify the coupon program into which the coupon is to be generated. The selected program is displayed in the bottom text box.
Advanced options	1. Select the coupon's **Print Type**, which determines how the coupon is displayed in the transaction receipt when rewarded: • Plain Text • Barcode

In the section	Do the following:
	Note: If Barcode is selected, a *Barcode Type* drop–down list is displayed. Select the barcode type from the list. Currently, only *Code 128* is supported. 2. Select the **Coupon Delivery**: • Single coupon with multiple uses • Multiple coupons with single use **Example:** The offer rewards customers with one $10 Off Next Transaction Coupon when customer buys one sack of rice. The customer buys 5 sacks of rice in a single transaction, making the customer eligible for a reward of 5 coupons. If the Coupon Delivery is set to **Single coupon with multiple uses**, after the transaction, only a single coupon is printed on the receipt that the customer can use 5 times. If the Coupon Delivery is set to **Multiple coupons with single use**, after the transaction, 5 coupons are printed on the receipt, each of which can be used only once. **Note:** If **Single coupon with multiple uses** is selected and the number of coupon uses that is requested in the offer exceeds the maximum number of uses of the selected trackable coupon program, Logix delivers multiple coupons with split uses. **Example:** The trackable coupon program max uses is set to **5** and the Coupon Delivery is set to **Single coupon with multiple uses**. In a transaction, the customer is eligible for the reward six times. The system then rewards two coupons, with one coupon having five uses and the other coupon with one use.
Distribution	1. Enter the **Description** of the coupon. This description is printed in the receipt. 2. Check the **Successful delivery required** check box. **Note:** If this option is checked, customers who avail of this offer cannot receive any other rewards from the offer if the delivery of the coupon fails. **Example:** If the offer has a Printed Message Reward, the message will not be printed on the customer receipt if the delivery of the coupon fails.

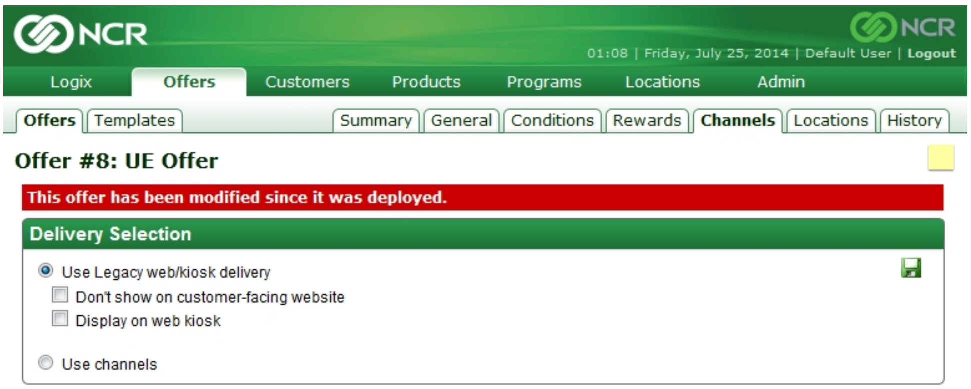
3. Select **Save**. The application displays the trackable coupon reward details in the Offer Reward sub–page. Retailers may create multiple trackable coupon rewards in a single offer.

Offer Channels

The Channels sub–page allows users to advertise offers through a kiosk, POS, or website. Logix allows customers to select both channels or specify a certain channel through which to send offer data. This chapter describes the steps in setting channels for offers.

To use channels for offers, follow these steps:

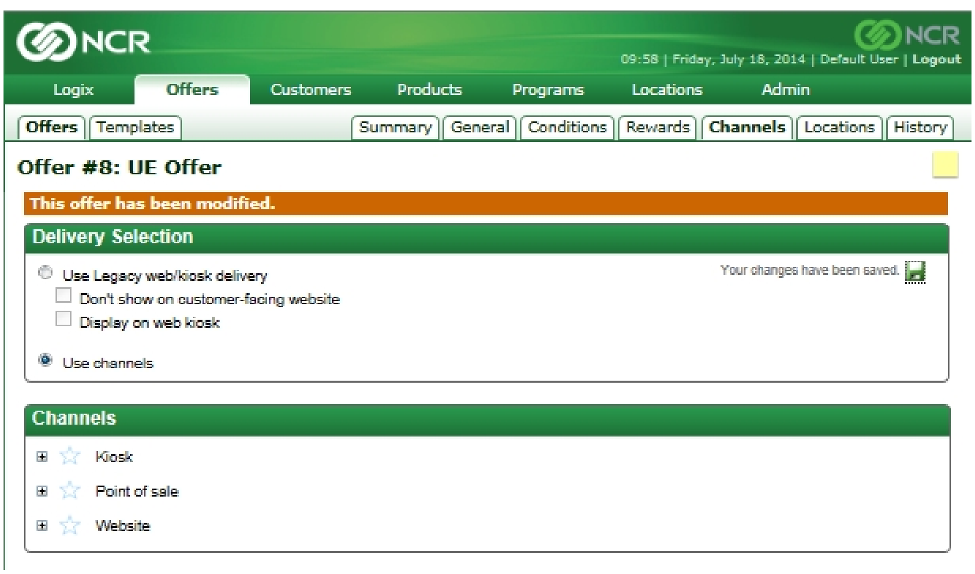
1. Select the **Channels** sub–page tab. The Channels sub–page is displayed.



2. In the Delivery Selection section, select the **Use channels** radio button.

Note: Select the **Use Legacy web/kiosk delivery** radio button when using a Logix version prior to Logix 5.19. This option is selected by default.

3. Select the **Save** icon. The application displays the Channels section.

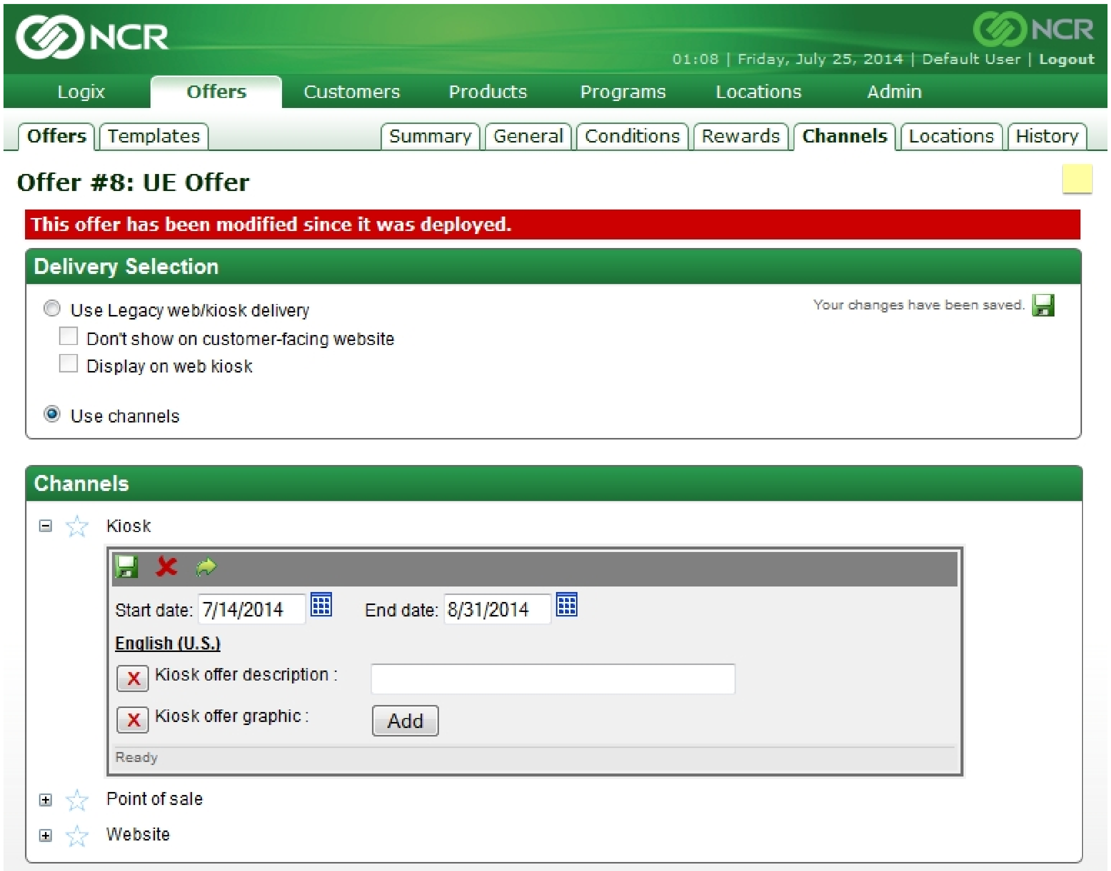


Note: Refer to the next sections for information on setting the Kiosk, POS, and Website channels.

Setting the Kiosk Channel

To send offer data through a kiosk, follow these steps:

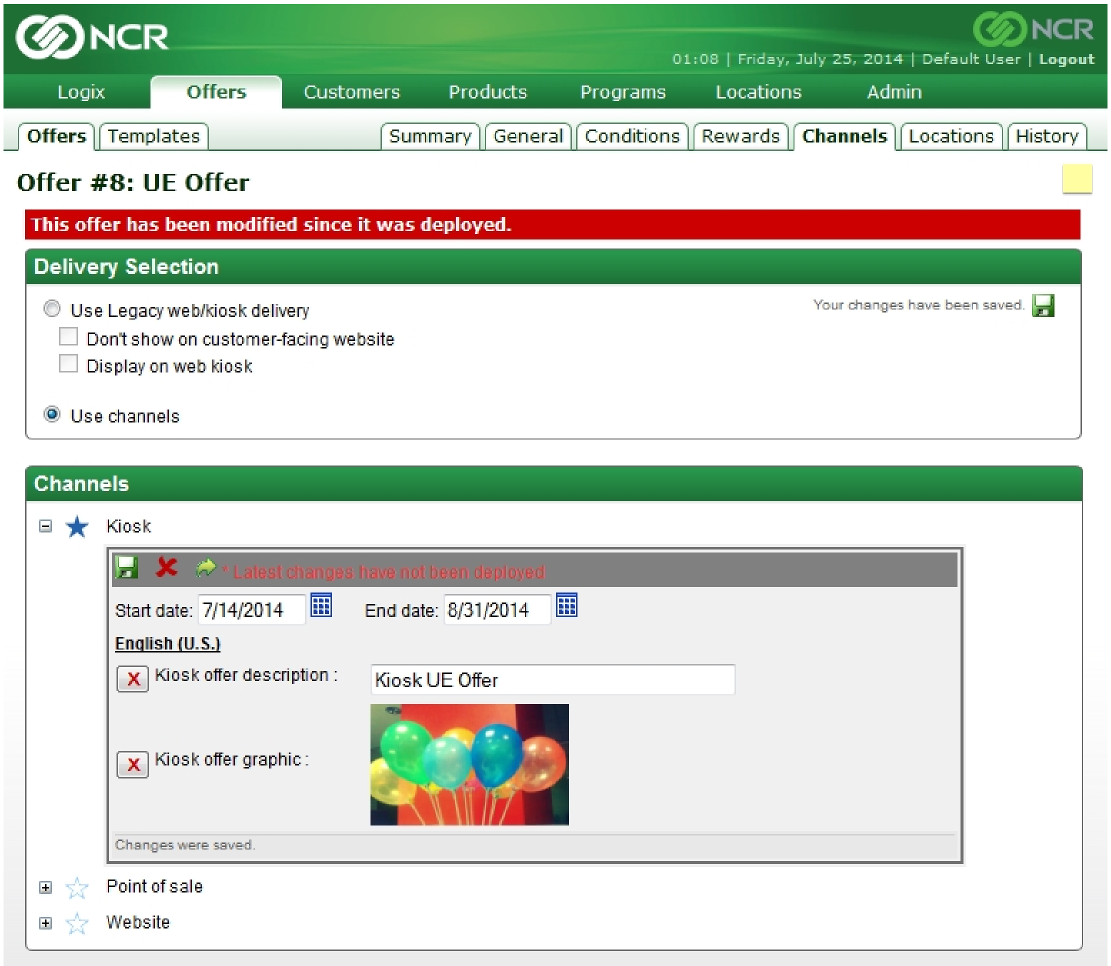
1. From the Channels section of the Channels sub–page, select the **Kiosk** expand button. The Kiosk configuration parameters are displayed.



2. Enter the data for the following parameters:

   - **Start/End Dates**—advertises the offer on the kiosk during these dates.
   - **Kiosk offer description**—describes the offer details that is displayed on the kiosk.
   - **Kiosk offer graphic**—indicates the offer image that is displayed on the kiosk. For more information, refer to *Adding Offer Images* on page 351.

3. Select the **Save** icon to associate the offer with the kiosk. The star icon is highlighted.



Deploying Offer to the Kiosk

To deploy an offer to a kiosk, select the **green arrow** icon from the Kiosk configuration section. The Kiosk configuration section displays the "Deployed" status.

Removing Kiosk Channel Configuration

To remove a kiosk channel from an offer, follow these steps:

1. From the Kiosk configuration section, select the **Delete** (X) icon.

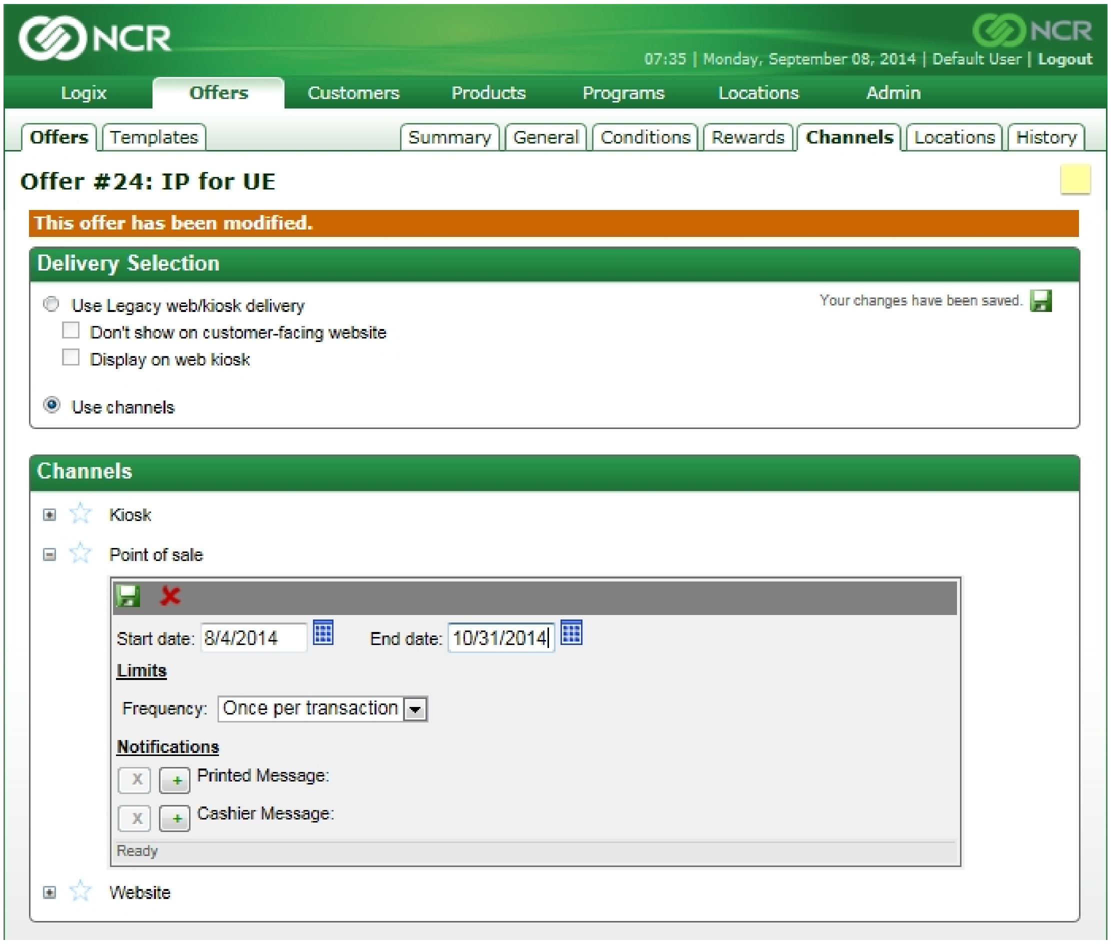
A confirmation window is displayed.

2. Select **OK**.

Setting the POS Channel

To set the parameters for offer data sent to the POS channel, follow these steps:

1. From the Channels section of the Channels sub–page, select the **Point of sale** expand button. The POS configuration parameters are displayed.



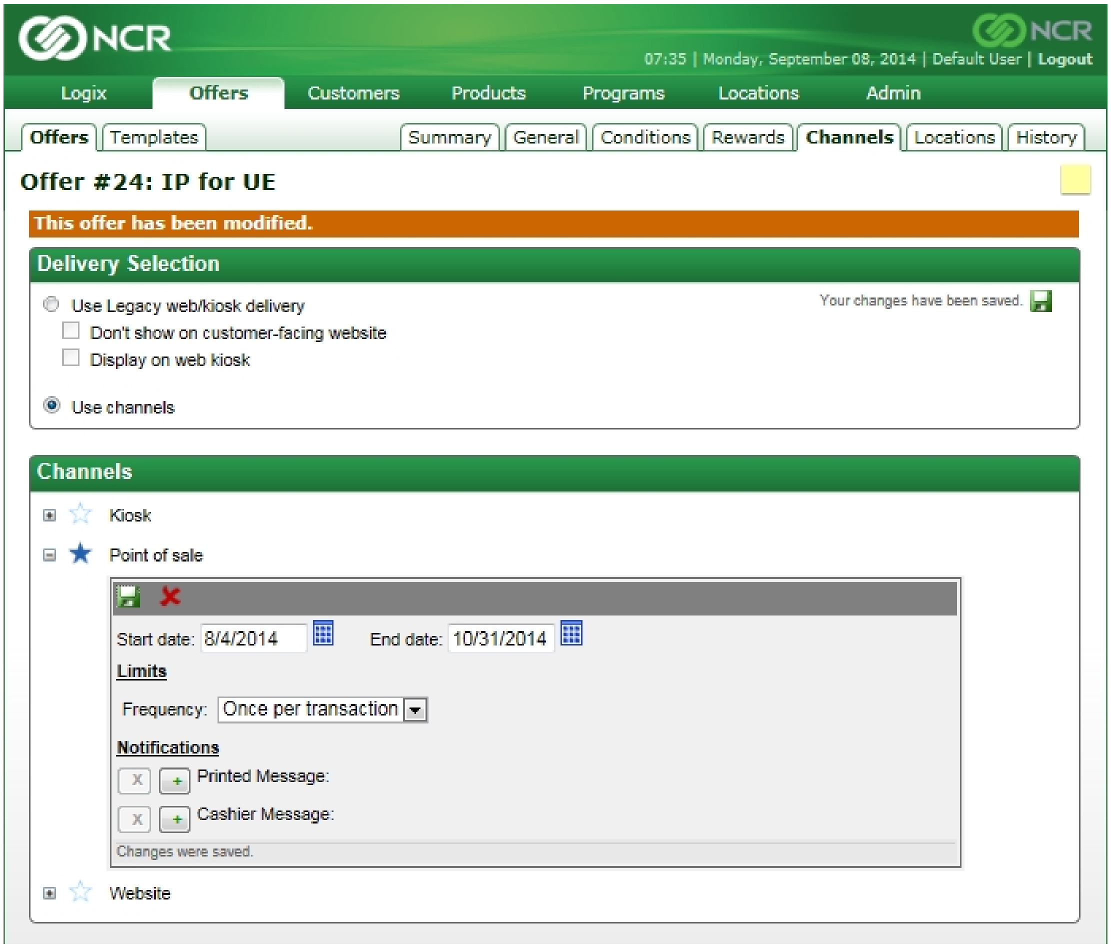
2. Enter the data for the following parameters:

- **Start/End Dates**—the offer data is advertised on the POS during these dates.

Note: By default, these dates are based on the production dates of the offer.

- **Limits**—control the frequency at which the offer data notifications are made available.
- **Notifications**—inform customers that they are eligible for the offer.

3. Select the **Save** icon to associate the offer with the kiosk. The star icon is highlighted.



Note: To deploy an offer to a POS, refer to *Deploying Offers* on page 177.

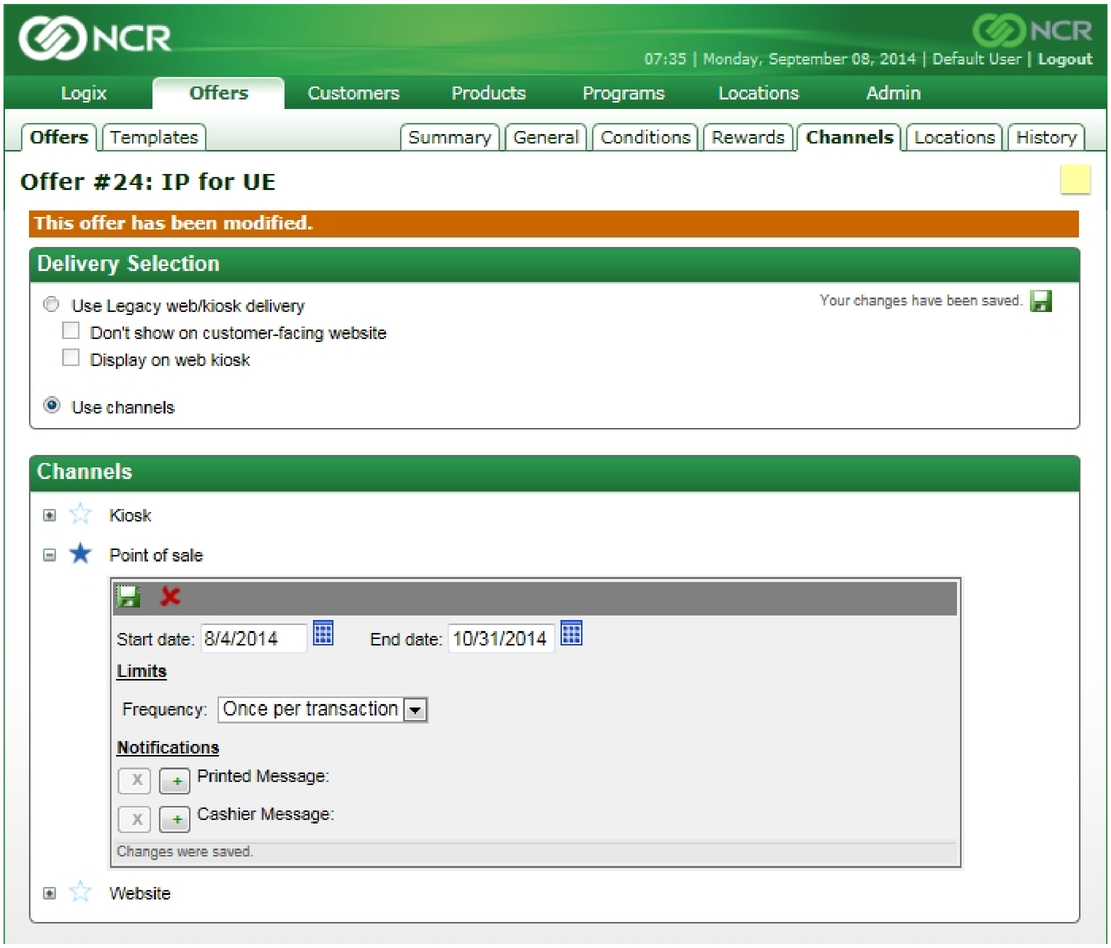
To set POS Notifications, select the add button of a notification type. The corresponding window is displayed. To configure a notification, do any of the following:

- Set a printed message reward. For more information, refer to *Setting Printed Message Rewards* on page 309.
- Set a cashier message reward. For more information, refer to *Setting Cashier Message Rewards* on page 312.

Removing POS Channel Configuration

To remove a POS channel from an offer, follow these steps:

1. From the POS configuration section, select the **Delete** (X) icon.



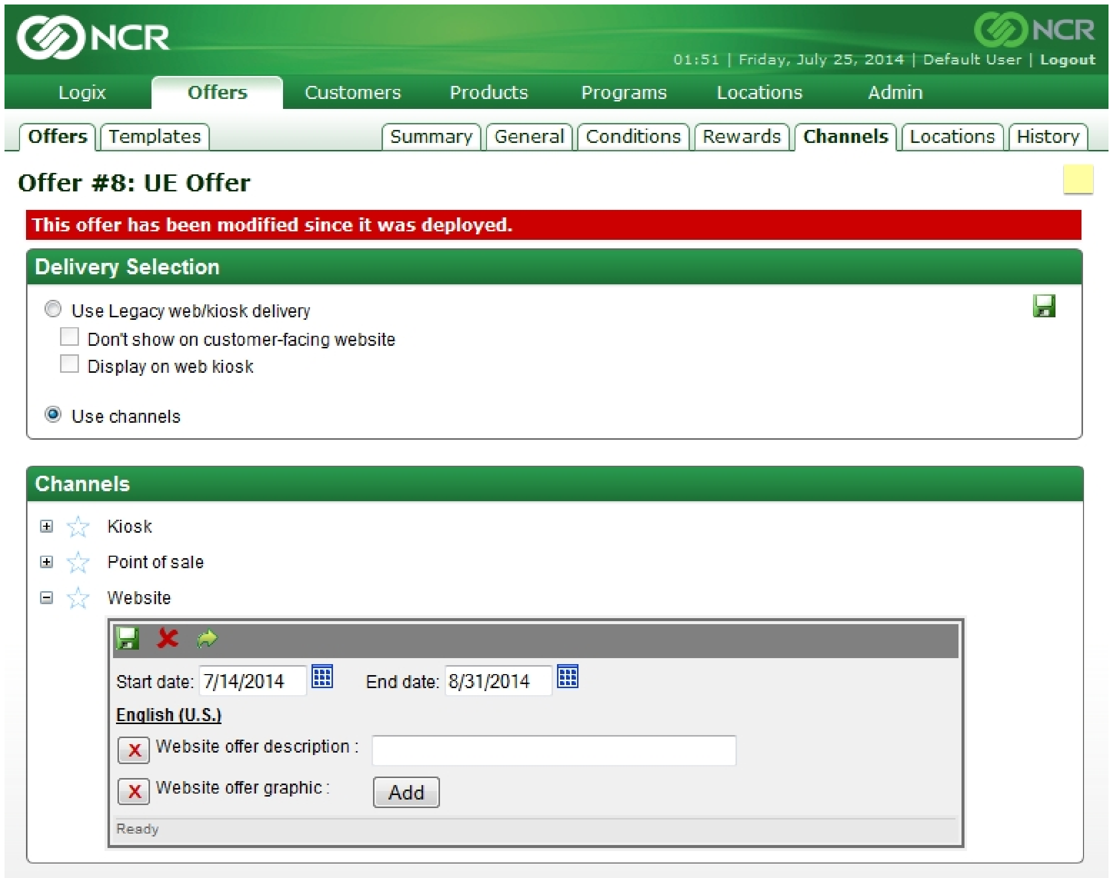
A confirmation window is displayed.

2. Select **OK**.

Setting the Website Channel

To send offer data through a website, follow these steps:

1. From the Channels section of the Channels sub–page, select the **Website** expand button. The Website configuration parameters are displayed.



2. Enter the data for the following parameters:

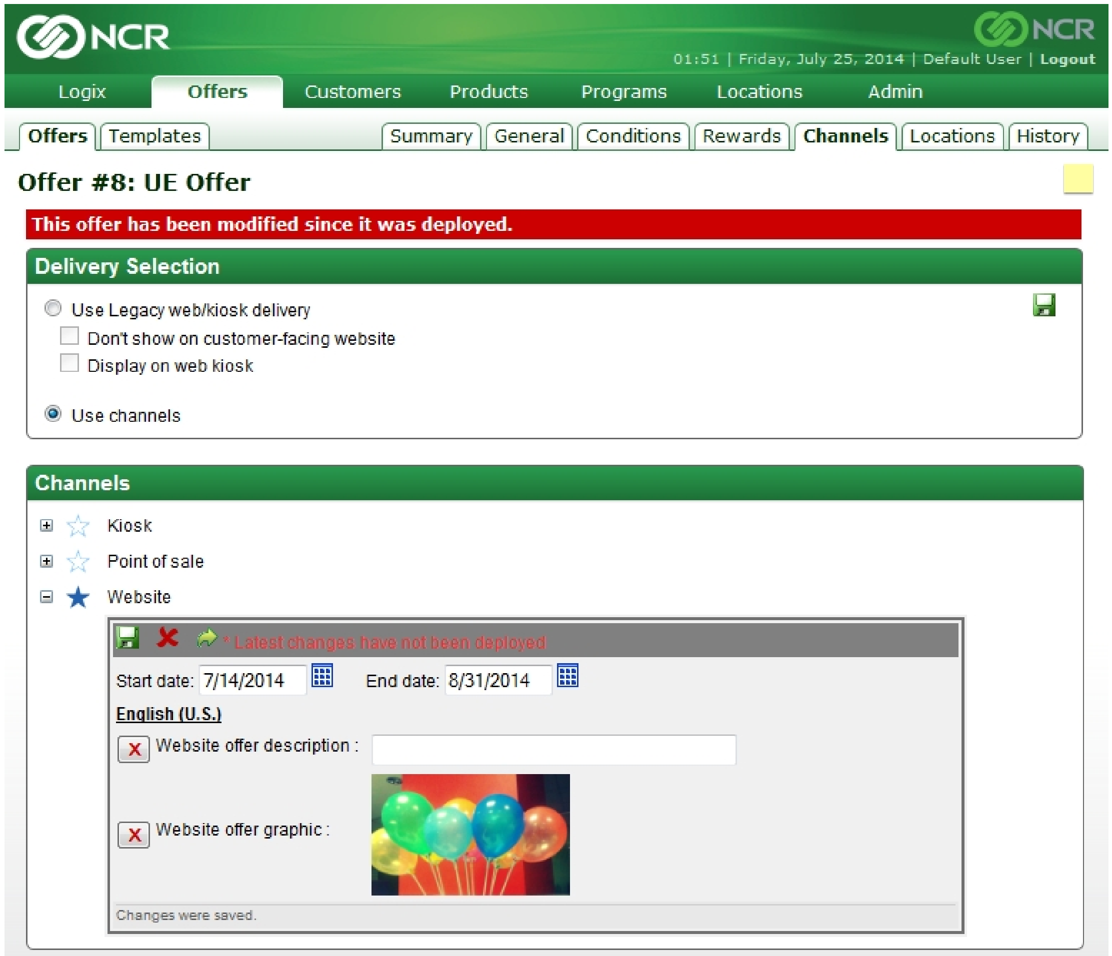
   - **Start/End Dates**—the offer data is advertised on the website during these dates.

   Note: By default, these dates are based on the production dates of the offer.

   - **Website offer description**—describes offer details that are displayed on the website.

   - **Website offer graphic**—offer image that is displayed on the website. For more information, refer to *Adding Offer Images* on page 351.

3. Select the **Save** icon to associate the offer with the website. The star icon is highlighted.



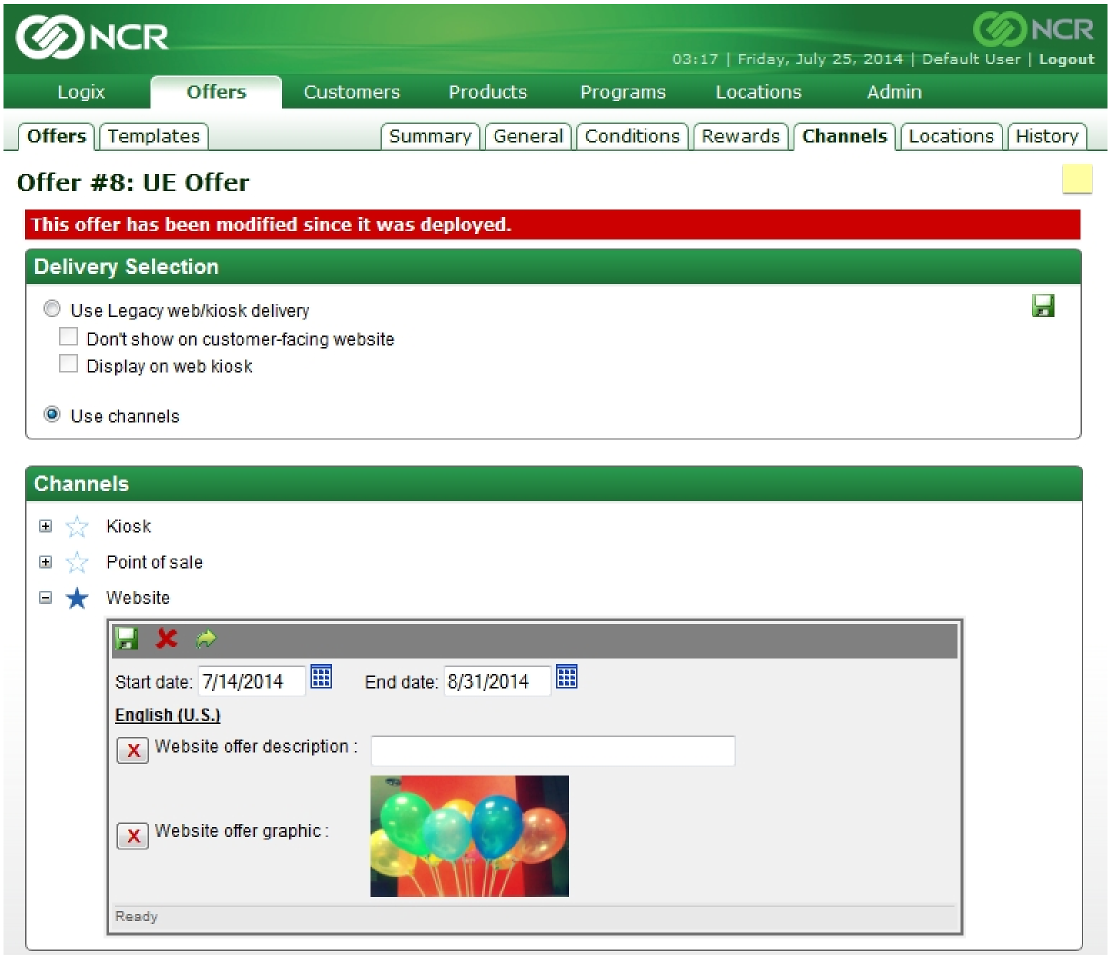
Deploying Offer to the Website

To deploy an offer to a website, select the **green arrow** icon from the Website configuration section. The Website configuration section displays a "Deployed" status on the lower–left section.

Removing Website Channel Configuration

To remove an offer from a website, follow these steps:

1. From the Website configuration section, select the **Delete** (X) icon.



A confirmation window is displayed.

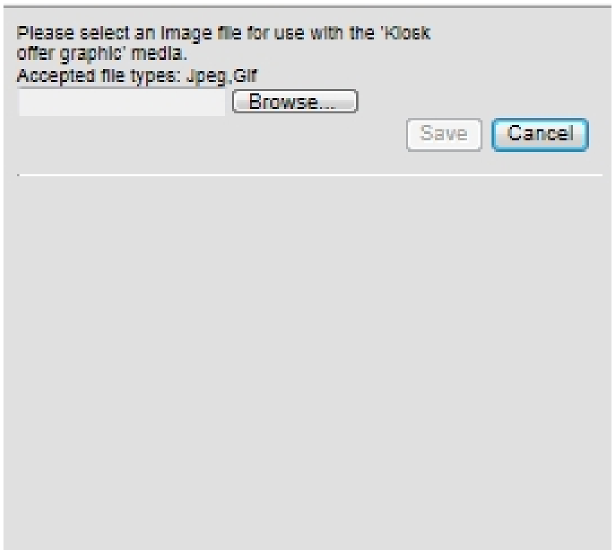
2. Select **OK**.

Adding Offer Images

To add offer images either to the kiosk or to the website channel, follow these steps:

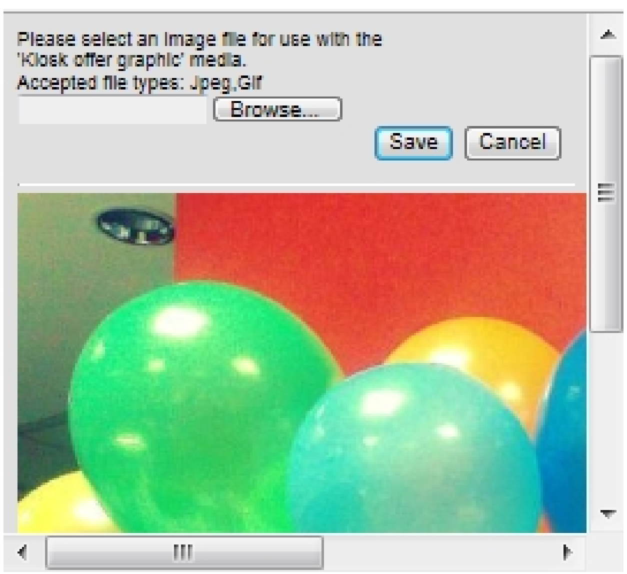
Note: The steps for adding offer images either to the kiosk or to the website channel are the same. For reference, this procedure uses images from the Kiosk configuration section.

1. From a Channel configuration section, select **Add**. The application displays the following pop–up window:

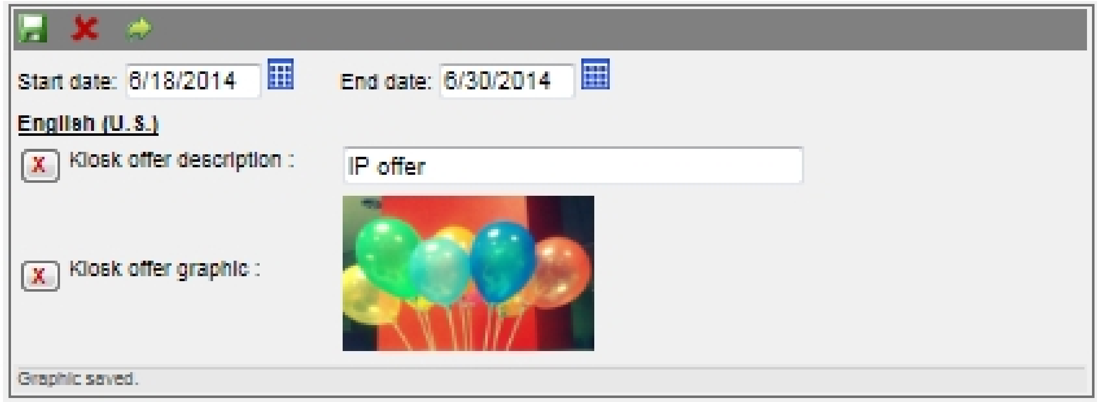


Note: Logix accepts only files that are in `.jpeg` and `.gif` formats.

2. Select **Browse** and then, select an image file. The image file is displayed.



3. Select **Save** to use the image for the offer. The image is displayed in the selected Channel configuration section, as shown in the following example:



4. Select the **Save** icon.

Deleting Offer Images

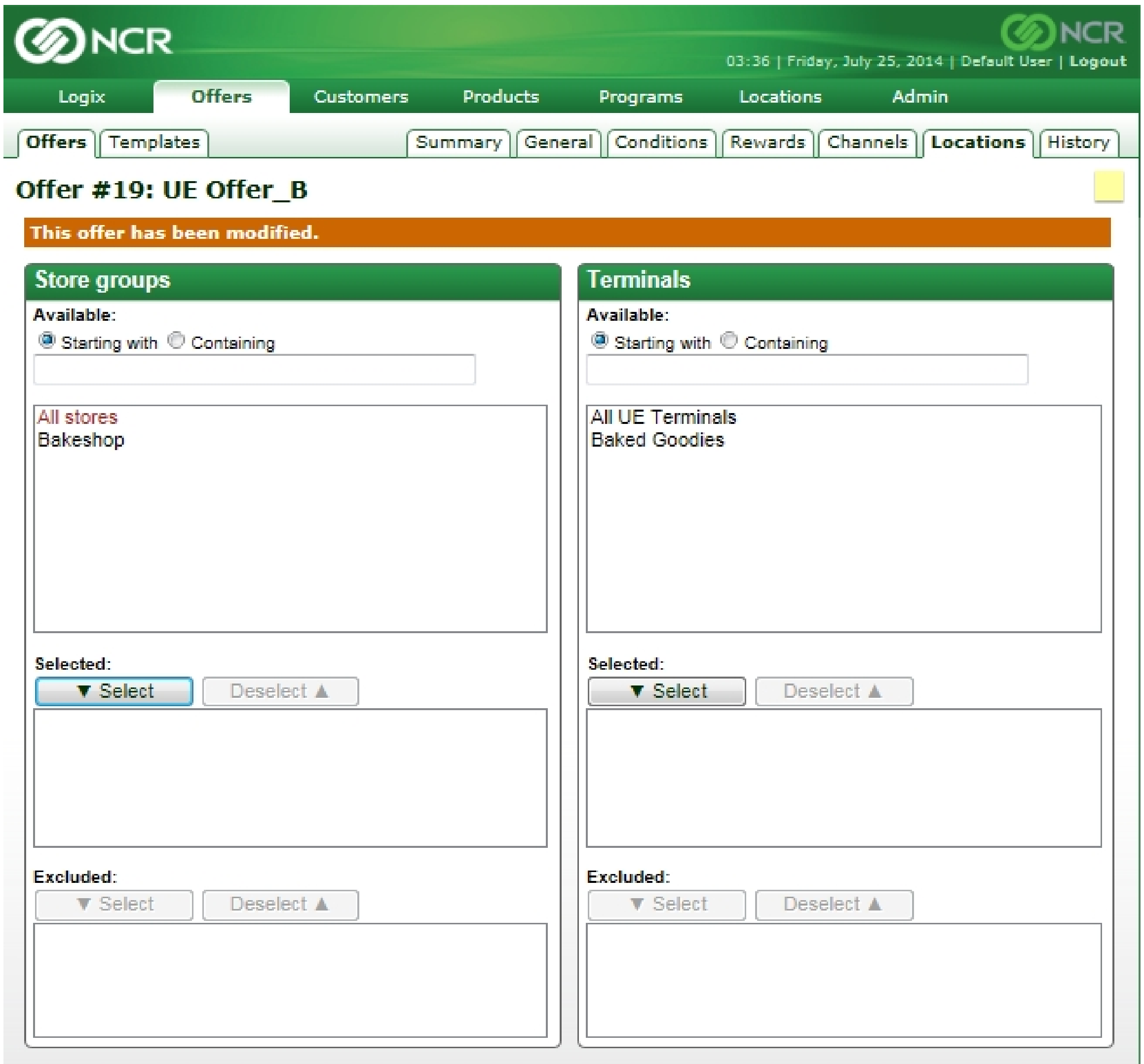
To delete images from offers, follow these steps:

1. From a Channel configuration section, select the **Delete** button that corresponds with the image. A confirmation window is displayed.
2. Select **OK**. The image is removed.

Offer Locations

The Locations sub–page permits users to select in which store or terminal the offer becomes available to customers. Logix also allows offers to be made simultaneously available in store groups and terminals. This section describes the steps in setting offer locations.

To display the Locations sub–page, select the **Locations** tab.



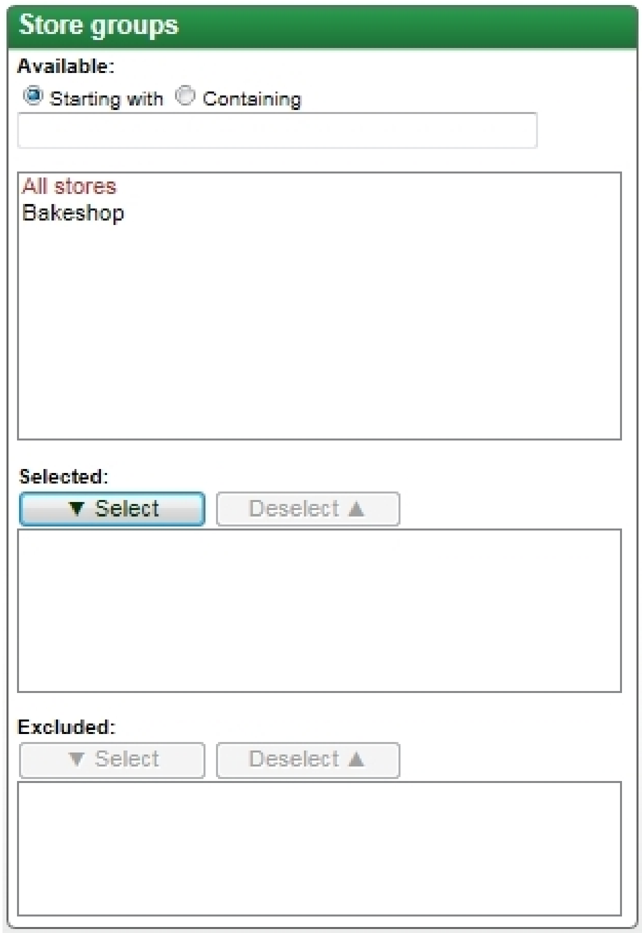
The Locations sub–page displays the Store groups and the Terminals sections.

Setting Store Group Locations

To make offers available to stores in a specific group, follow these steps:

1. From the Store groups section of the Locations sub–page, highlight a group from the Available text box.

Note: To associate an offer with a store, ensure that the store is associated with a store group. For more information, refer to *Associating Stores with Store Groups* on page 529.



Note: To create a store group, refer to *Creating Store Groups* on page 525.

2. Do either of the following:

    - In the Selected section, use the **Select** button to make the offer available only to the Selected store group. The store group is displayed in the Selected store group text box.

    Note: Selecting **All stores** permits users to optionally specify a store group to exclude from the offer by adding it in the Excluded store groups text box.

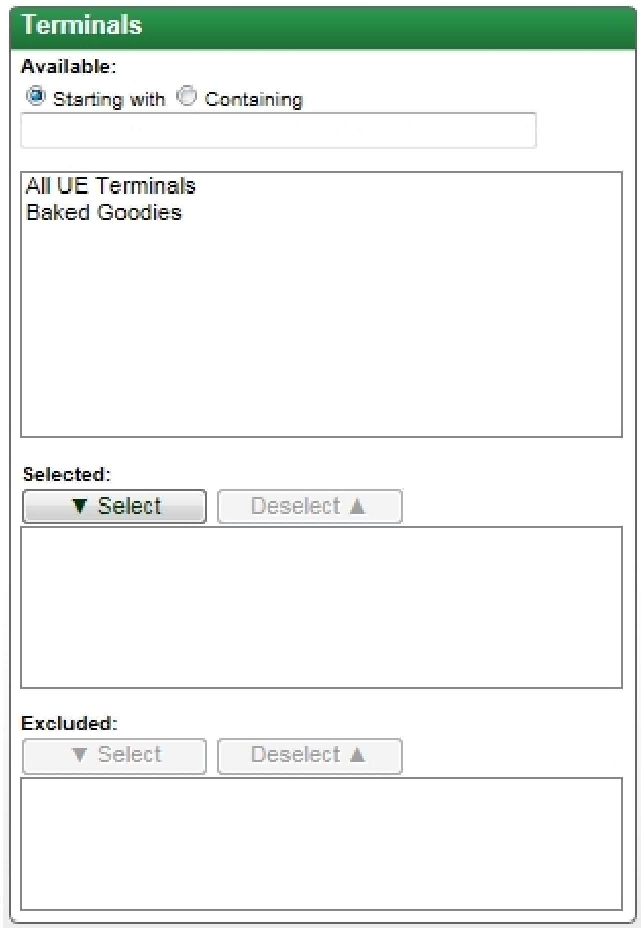
    - From the Excluded area, use the **Select** button to exclude the store group from the offer. The store group is displayed in the Excluded store groups text box.

Setting Terminal Locations

To make offers available only to specific terminal types, follow these steps:

1. From the Terminals section, highlight a terminal from the Available text box.

Note: Ensure that the store in which the offer is deployed is associated with the terminal.



Note: To create a terminal, refer to *Creating Terminal Sets* on page 546.

2. Do either of the following:

   - In the Selected section, use the **Select** button to make the offer available only to the selected terminal. The terminal is displayed in the Selected terminal text box.

   Note: Selecting **All UE terminals** permits users to optionally specify a terminal to exclude from the offer by adding it in the Excluded terminals text box.

   - From the Excluded area, use the **Select** button to exclude the terminal from the offer. The terminal is displayed in the Excluded terminals text box.

Chapter 5: Defining Customer Configuration

Overview

The Customers page displays a set of sub–pages and tools that are used to create and manage customer records, such as individual customers, customer groups, and household. Logix defines a customer as a shopper with or without a loyalty card. Customers who have loyalty card numbers are referred to as cardholders with corresponding Customer IDs.

This chapter describes how to create and manage customer records.

Customer Records

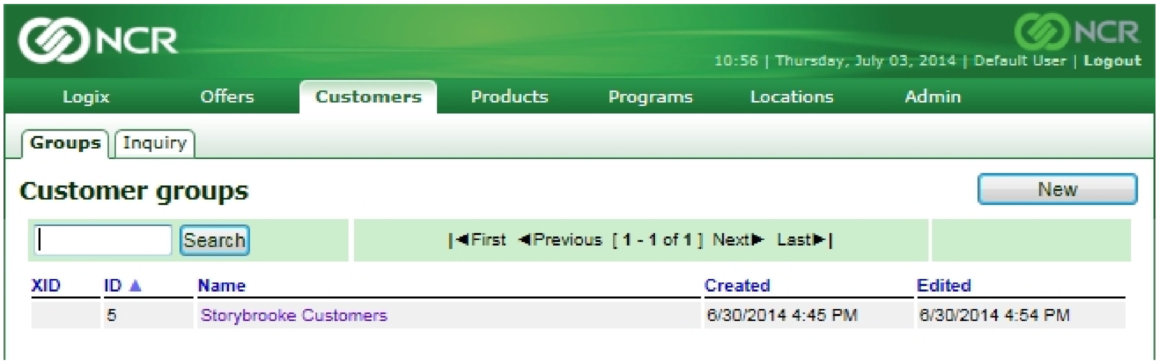
Logix maintains and manages customer records using any of the following factors:

Customer Record	Description
Households	Represent a group of customers who share rewards and contribute to points totals. It is considered a single entity for the purposes of an offer. A household is also identified by a household number.
Cards	Indicate the status of cards associated with customers: • Expired • Lost/stolen • Default card • Active • Inactive • Canceled **Note:** Card status defines the different card status levels associated with a customer's account.
Customer Card Types	Indicate the type of loyalty card that is used to identify a cardholder of a Logix customer record. • Customer Card • Alternate ID—other types of IDs **Example:** Social Security Card • Username • Associate ID • Email Address • Secondary Member Card

Logix is configurable to use multiple types of loyalty cards that are assigned to customer accounts. Customer IDs within each of the loyalty card types are unique and serve to identify the cardholder to a Logix customer record.

Accessing Customer Records

To access customer records, select the **Customers** main tab. The Customer Groups page is displayed by default.



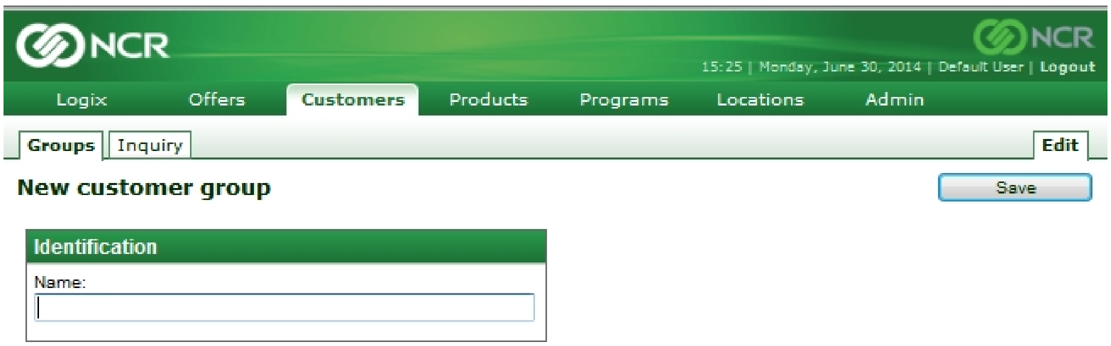
Select any of the following Customer page tabs to manage customer records:

Page Tab	Description
Groups	Displays details of a customer group, which is a collection of customer IDs or Household IDs. It permits users to define and maintain a customer group. The following characteristics define Customer Groups: • They can be used simultaneously in multiple offers. • They can persist without being used in any offers. **Note:** Customer IDs used in building offers can be part of a customer group.
Inquiry	Permits users to create and manage individual customers and households. For more information, refer to *Performing Customer Inquiries* on page 367.

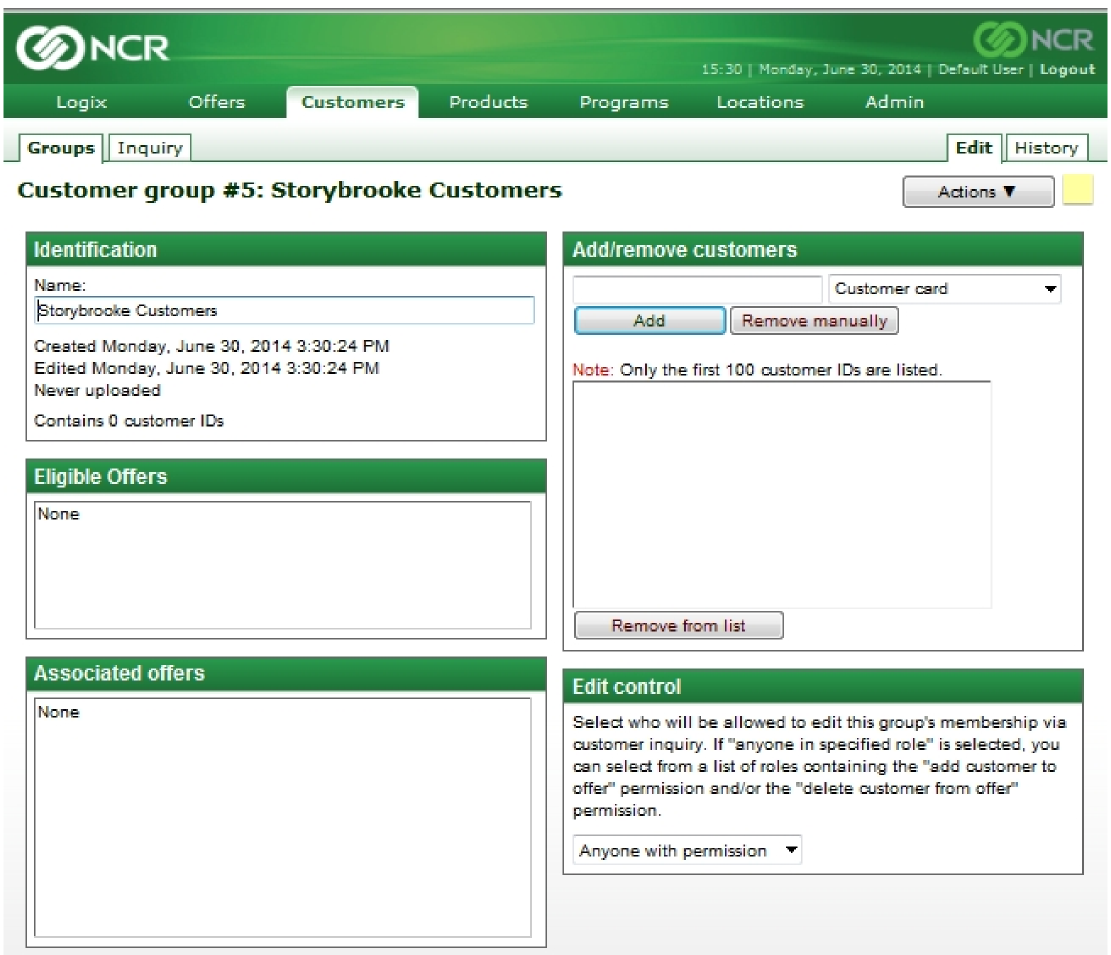
Creating Customer Groups

To create a customer group, follow these steps:

1. From the Customer Groups page, select **New**. The application displays the New customer group page.



2. Enter the group **Name** and then, select **Save**. The Customer Group Configuration page is displayed.



Note: The configuration page of a new group is empty.

3. Use the following table to set parameters in specific sections:

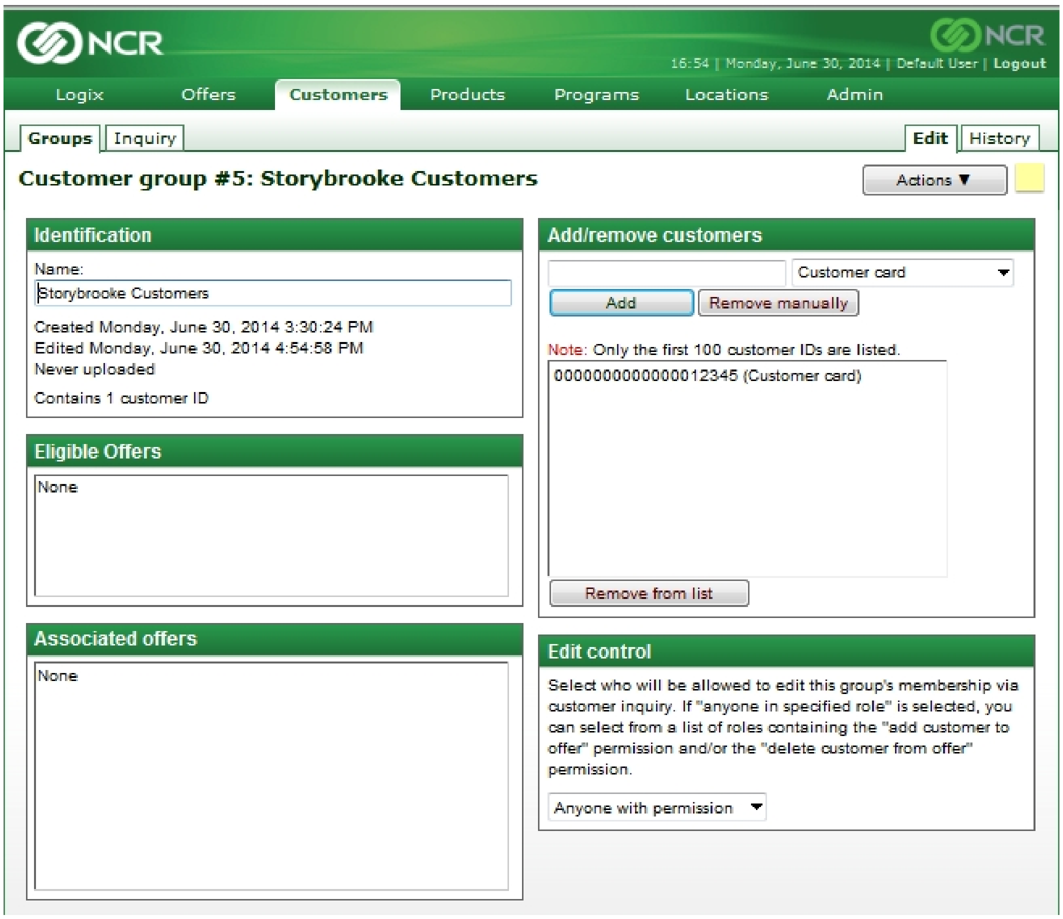
Section	Description
Identification	Displays general information about the group.
Eligible Offers	Displays a list of offers in which the customer or household can participate. For more information, refer to *Adding Customer Offer Eligibility* on page 384.
Associated Offers	Displays a list of offers using the customer group.
Add/remove customers	Permits users to maintain the customer list that comprise the customer group. For more information, refer to *Adding Membership Data* on page 363.
Edit control	Determines who is allowed to alter the membership of the group through the Customer Inquiry page using any of the following options: • **Anyone**—any users, regardless of their permissions, can add customers to this group or remove customers from this group through customer inquiry. • **Anyone with permission**—any users who have the appropriate permission can alter the group's membership from the Customer Inquiry page. Users with the "Add customer to offers" permission can add customers; those with the "Delete customer from offers" permission can remove customers. • **Anyone in specified role**—any users who have the specified role can alter the group's membership from the Customer Inquiry. Only roles that contain the "Add customer to offers" permission, the "Delete customer from offers" permission, or both, can be selected. • **No one**—no users, regardless of permission, can alter the group's membership from the Customer Inquiry page. **Note:** The setting in this section always overrides a user's role–based permissions in customer inquiry. **Example:** An administrator user cannot remove a customer from an offer if that offer uses a group with an edit control type of "no one." Alternately, a user who lacks the permission to add customers to offers can remove a customer from an offer if that offer uses a customer group with an edit control type of "anyone."

4. From the Actions menu, do any of the following:
    - Select **Save** to save a new group configuration or save the changes made to an existing group configuration.
    - Select **Delete** to remove a customer group configuration.
    - Select **Upload** to upload a membership file in plain text. For more information, refer to *Uploading Membership Files* on page 364.
    - Select **Download** to download a membership file in plain text.
    - Select **New** to create a customer group.
    - Select **Redeploy** to apply changes to the deployed associated offer.

Adding Membership Data

To manually add a customer to the group, follow these steps:

1. From the Add/remove customers section, do the following:
   - Select a Customer ID type from the drop–down list.
   - Enter the Customer ID in the corresponding field.
2. Select **Add**. The application displays the customer ID in the Customer ID text box.



Note: Customer IDs shorter than 19 digits are automatically padded with leading zeros.

3. Do any of the following:
   - From the Edit control section, select an edit permission option. For more information, refer to *Assigning Editing Control* on the next page.
   - Set the group with offers in which it can participate. For more information, refer to *Adding Customer Offer Eligibility* on page 384.
   - Associate the group with offers. For more information, refer to *Setting Customer Conditions* on page 195.
4. From the Actions menu, select **Save**.

Assigning Editing Control

To specify users who can modify a group's membership details, follow these steps:

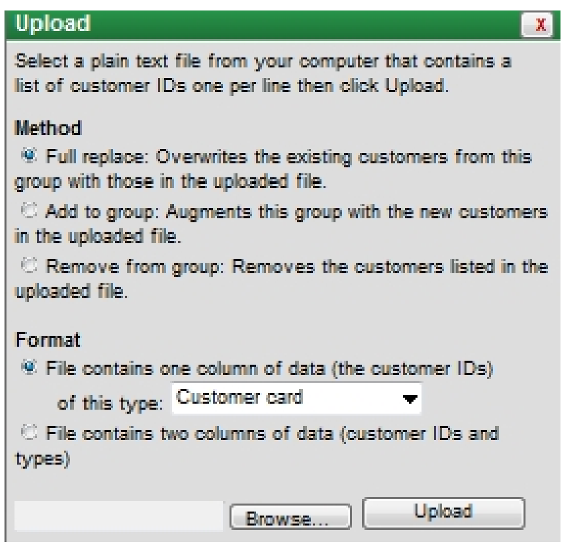
1. From the Edit Control section, select any of the following options:
   - Anyone
   - Anyone with permission
   - Anyone in specified role (Selecting this option displays a drop–down list with role options.)
   - No one
2. From the Actions button, select **Save**.

To view the groups associated with a role, refer to *Accessing Role Configuration* on page 563.

Uploading Membership Files

To upload a membership file, follow these steps:

1. From the Customer Group Configuration page, select **Upload** from the Actions menu. A pop–up window is displayed.



2. Select a **Method** and a **Format**.
3. Select **Browse**. A file directory window is displayed.
4. Select a plain text file and then, select **Upload**. The application displays the customer IDs in the Customer ID text box in the Add/Remove Customers section.
5. From the Actions menu, select **Save**.

Removing Customer Data

To remove a customer from the group, follow these steps:

1. From the Add/remove customers section, do one of the following:
   - Enter the Customer ID and the corresponding Card Type and then, select **Remove manually**.
   - Select a Customer ID in the Customers text box and then, select **Remove from list**.

   A confirmation window is displayed.
2. Select **OK**. The customer data is removed from the Customer text box.

Redeploying Customer Groups

Customer groups are automatically deployed when they are associated with deployed offers. Logix also allows users to update customer groups associated with deployed offers. To apply the changes, follow these steps:

1. From the Customer Groups page, select a customer group. The corresponding customer group configuration is displayed.
2. Modify any settings.
3. From the Actions menu, do the following:
   - Select **Save** to apply the changes.
   - Select **Redeploy** to deploy the customer group.

Downloading Customer Group Data

To download a list of Customer IDs, follow these steps:

1. From the Customer Groups List table, select a customer group name. The Customer Group configuration is displayed.
2. From the Actions menu, select **Download**. The application downloads a plain text file that contains the list of Customer IDs for the group.

Deleting Customer Groups

To delete a customer group, follow these steps:

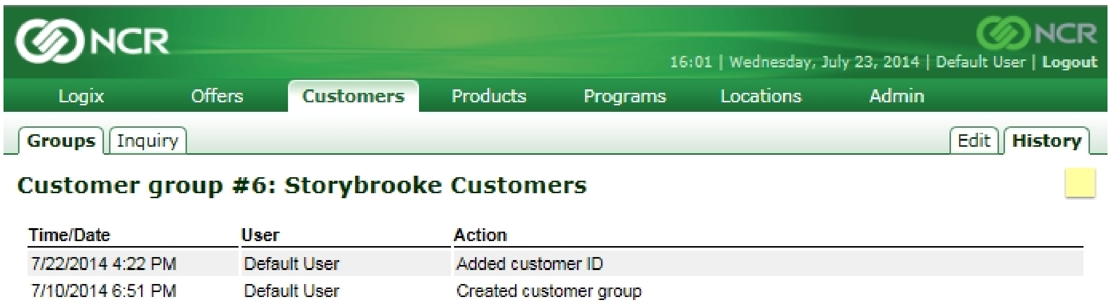
Note: Customers groups associated with offers cannot be deleted.

1. From the Customer Groups page, select a group name. The application displays the corresponding Customer Group configuration page.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**.

Tracking Customer Group Changes

To view the history details of a customer group, follow these steps:

1. From the Customer Groups page, select a customer group. The application displays the Customer Group Configuration sub–page.
2. Select the **History** sub–page tab. The following example shows the History sub–page of a customer group:

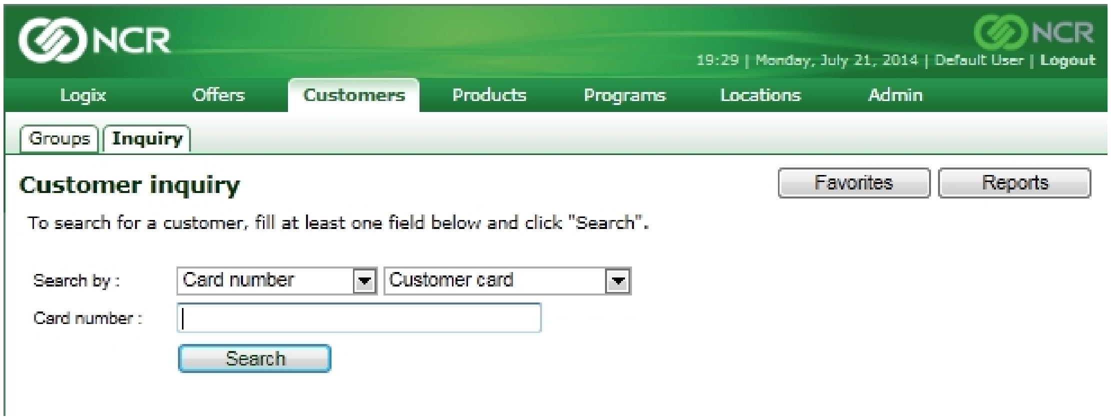


Note: Select the **Notes** icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Performing Customer Inquiries

To perform a customer inquiry, follow these steps:

1. From the Customers main tab, select the **Inquiry** page tab. The Customer Inquiry page is displayed.



   The Customer Inquiry page also displays the following buttons:

   - **Favorites**—displays a list of offers that were set as favorites by customers. For more information, refer to *Favorite Offers* on page 399.
   - **Reports**—permits Logix users to generate reports on adjustments made to customers' balances. For more information, refer to *Generating Adjustment Balance Reports* on page 402.

2. From the Search by drop–down list, select an option.

   Note: Selecting **Card number** requires a corresponding card number type.

   Use any of the following types of records:

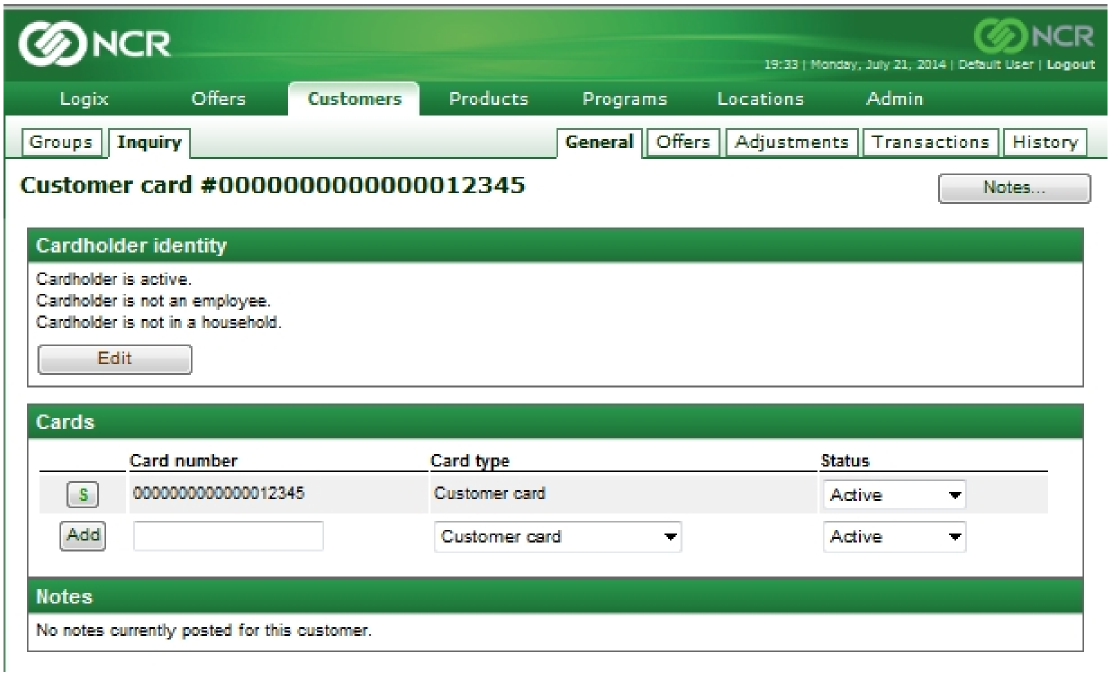
   - **Customer**—a record that stands alone, unconnected to any other customers.
   - **Household**—a record that represents a collection of related customers.

     Note: Customers and households are otherwise treated much the same in customer inquiry.

3. Enter the corresponding data for the selected option.

   Note: To filter search results, select **Advanced** and then, enter the specific criteria in the corresponding fields.

4. Select **Search**. The application displays the Customer Record page. The following example shows the record for a Customer:



Note: If Logix cannot find a match for the searched data, the Customer Inquiry page displays an option to add the customer. For more information, refer to *Adding Customer Record* on page 370.

The Customer Record page displays the following sections:

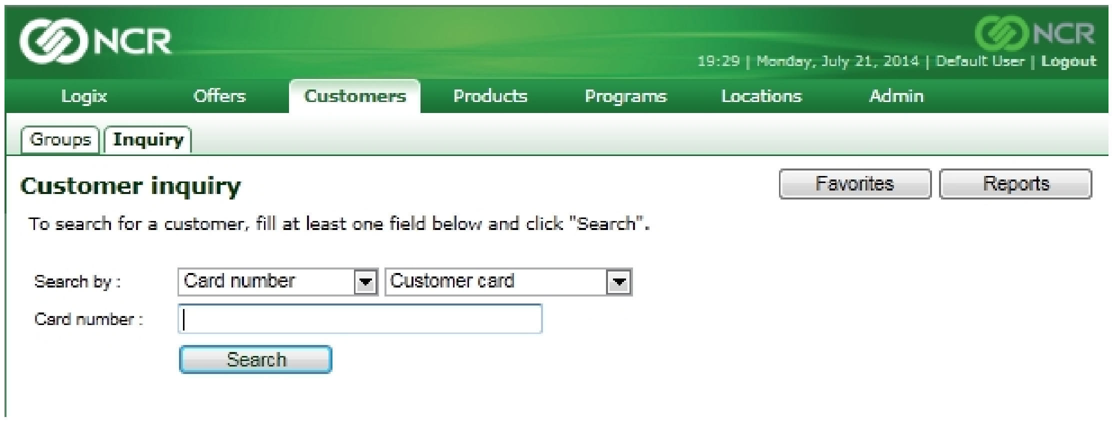
Section	Description
Customer Record Type	Displays either of the following types of customer records: • **Customer Card**—indicates that the customer is not connected with other customers • **Household Card**—indicates that the customer belongs to a group of related customers, which are also listed in the Cardholders section. For more information, refer to *Adding Household Record* on page 375. **Note:** Customers and households are otherwise treated much the same in customer inquiry.
Cards	Displays a list of card numbers, card types, and indicates whether the card is active or inactive.

Section	Description
	Note: Depending on the Logix installation, customers can have a single loyalty card, have multiple cards, or have no card at all. This feature allows Logix to differentiate between customers and their cards.
Cardholders	Displays a list of customers that belong to a Household. **Note:** This section only displays on a Household Record page.
Notes	Displays any notes attached to the customer’s account. Use the **Notes** buttons to create notes. For more information, refer to *Using the Notes Function* on page 703.

Adding Customer Record

If Logix cannot find a match to the customer using the Search function, the Customer Inquiry page allows users to add a customer. To add a customer record, follow these steps:

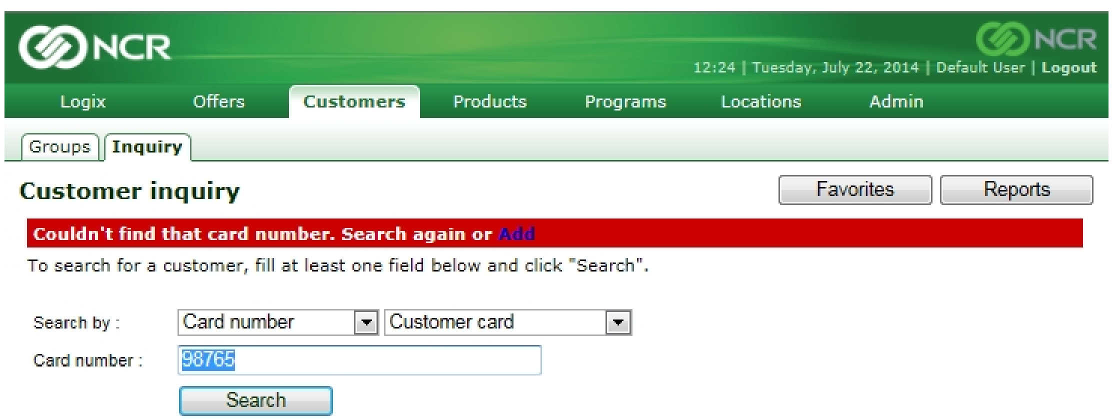
1. From the Customers main tab, select the **Inquiry** page tab. The Customer Inquiry page is displayed.



2. From the Search by drop–down list, select a customer option.

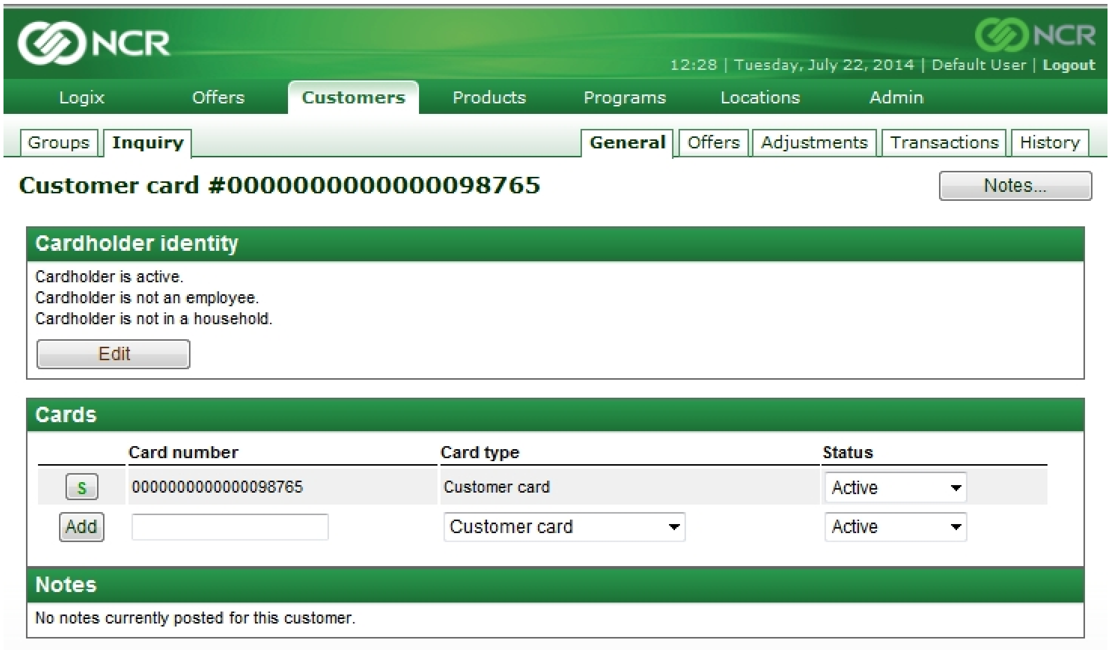
Note: Selecting **Card number** requires a corresponding card number type.

3. Enter the corresponding data for the selected option.
4. Select **Search**. The application displays the following page:



Note: If the Add function is not available, enable the **Allow customer record creation if not found in customer inquiry** option. For more information, refer to *Customer Options* on page 713.

5. Select **Add**. The corresponding customer record page is displayed as shown in the following example:



From the Customer Record page, do any of the following:

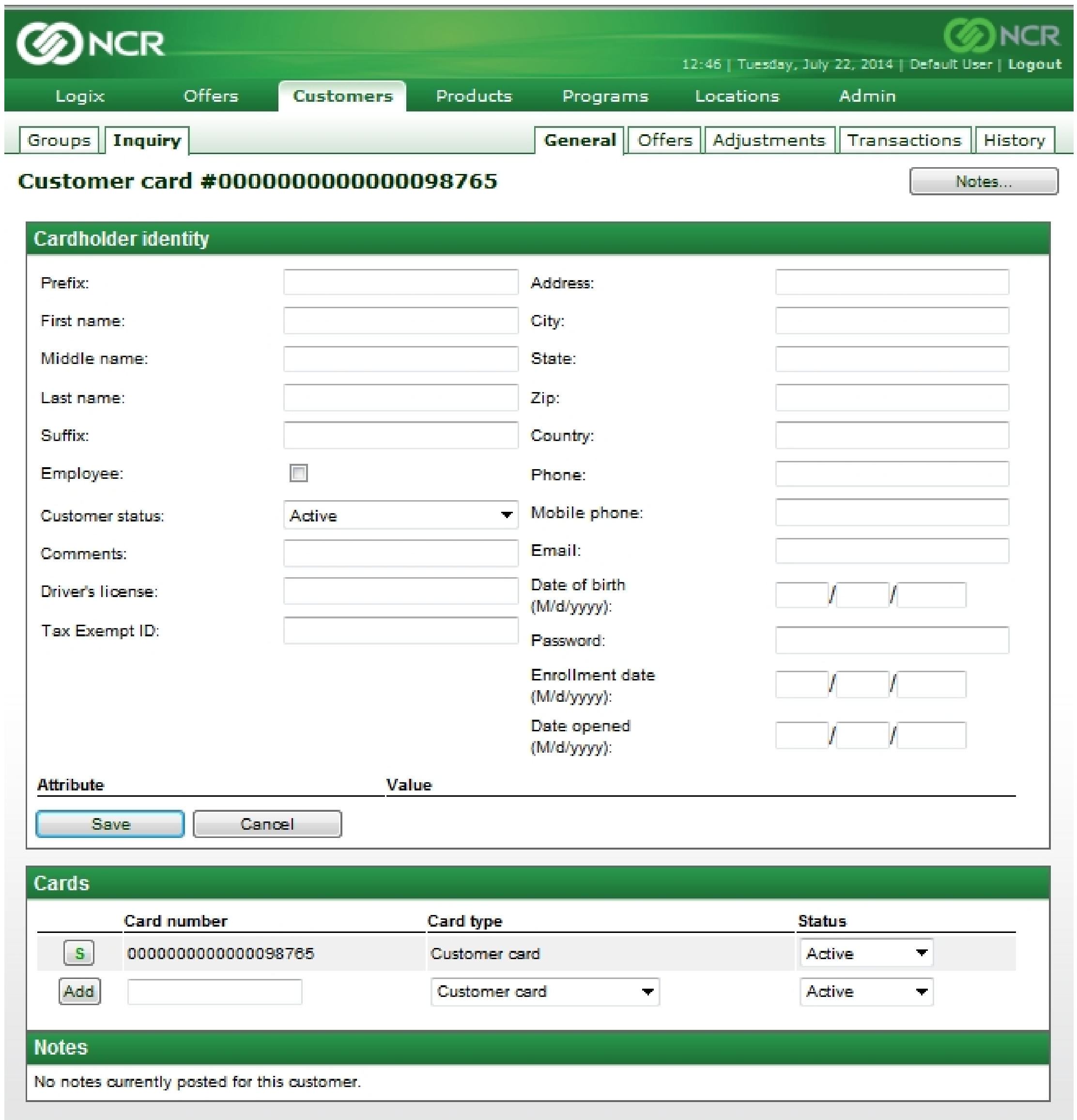
- Add customer information or details. For more information, refer to *Adding Information for Individual Customers* on the next page.
- Add customer cards. For more information, refer to *Adding Customer Cards* on page 373.
- Modify a card status. For more information, refer to *Modifying Customer Card Status* on page 374.
- Remove a customer card. For more information, refer to *Removing Customer Cards* on page 374.

Adding Information for Individual Customers

To add information for individual customers, follow these steps:

Note: This procedure assumes that the customer data does not exist in the system.

1. From the Customer Record page, select **Edit**. The Customer Identity page is displayed.



Note: If the Attribute drop–down list is disabled, contact an NCR Professional Services Consultant.

2. Enter the customer information in the corresponding fields.

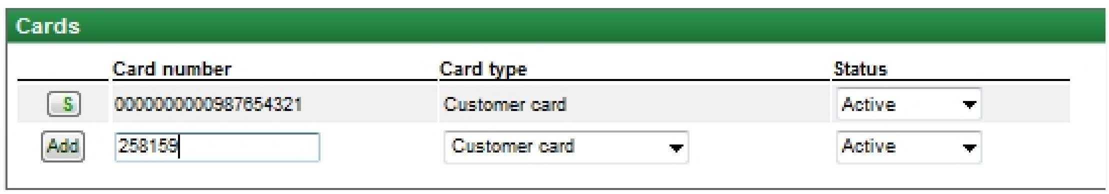
Note: If the customer is an employee, select the Employee checkbox and then, enter the Employee ID.

3. Select **Save**. The Cardholder Identity page is updated with the customer information.

Adding Customer Cards

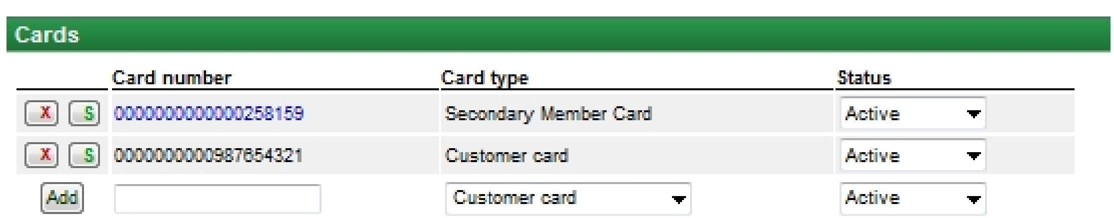
Depending on the system configuration, the customer can be associated with multiple cards. To add a card associated with a customer, follow these steps:

1. In the Cards section of the Cardholder Identity page, enter the card number in the corresponding field, as shown in the following example:



Note: If the card number already exists in the system, an error message is displayed.

2. From the Card type drop–down list, select a card type.
3. From the Status drop–down list, select a card status:
   - **Active**—card can be used in transactions.
   - **Inactive**—card has not been used for a certain period.
   - **Canceled**—card was canceled and cannot be used.
   - **Expired**—card cannot be used because the allotted time to use the card has exceeded.
   - **Lost/Stolen**—card was reported as lost or stolen and cannot be used in any transactions.
   - **Default Card**
4. Select **Add**. The customer card is added to list of cards associated with the cardholder.



Modifying Customer Card Status

Card status defines the different card status levels associated with a customer's account. To make changes to a customer’s card status, follow these steps:

1. In the Cards section of the Customer Identity page, select a card status from the corresponding Status drop–down list.
    - **Expired**
    - **Lost/Stolen**
    - **Default Card**
    - **Active**
    - **Inactive**
    - **Canceled**
2. Select the **S** button to apply the update.

Removing Customer Cards

To remove customer cards, follow these steps:

Note: Users can remove a card depending on their permission. For more information, refer to *Permissions* on page 839.

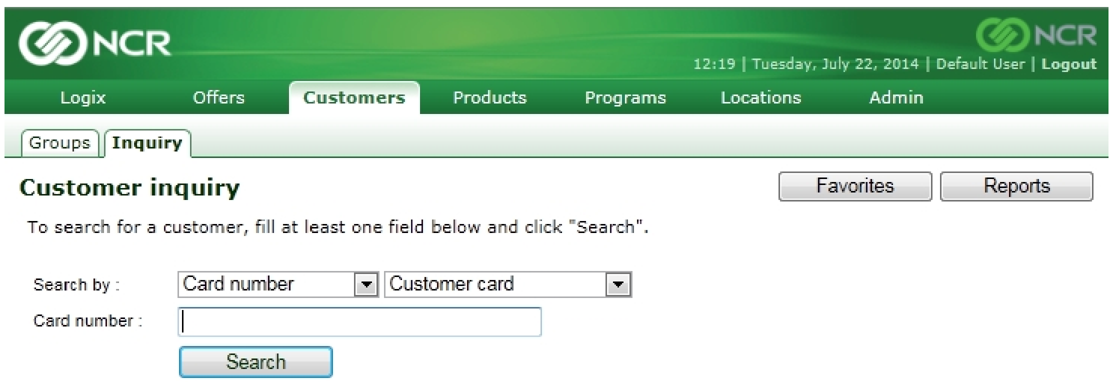
1. In the Cards section of the Cardholder Identity page, select the **X** button of the corresponding card. A confirmation window is displayed.
2. Select **OK**. The card is deleted from the Cards list.

Adding Household Record

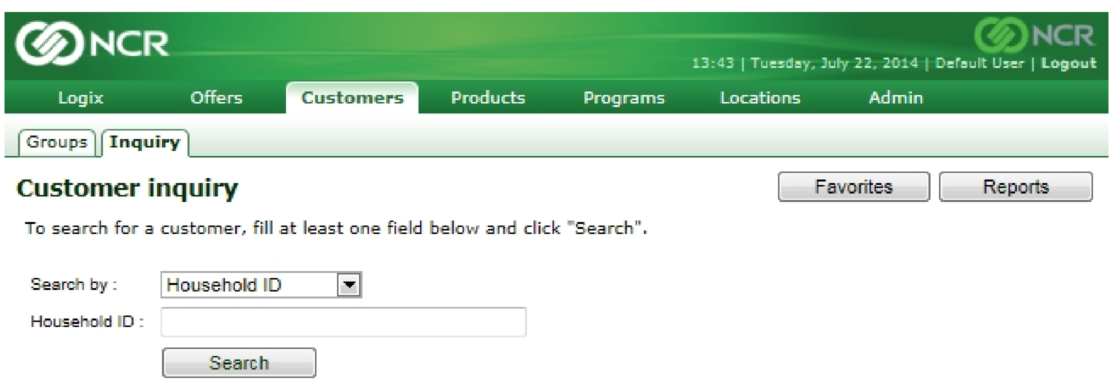
A household ID number identifies a small group of individual but closely–related shoppers, commonly spouses. Members of a household share rewards, contribute together to point totals, and in general are considered a single entity for the purposes of an offer.

If Logix cannot find a match to the household using the Search function, the Customer Inquiry page allows users to add a household. To add a customer record, follow these steps:

1. From the Customers main tab, select the **Inquiry** page tab. The Customer Inquiry page is displayed.

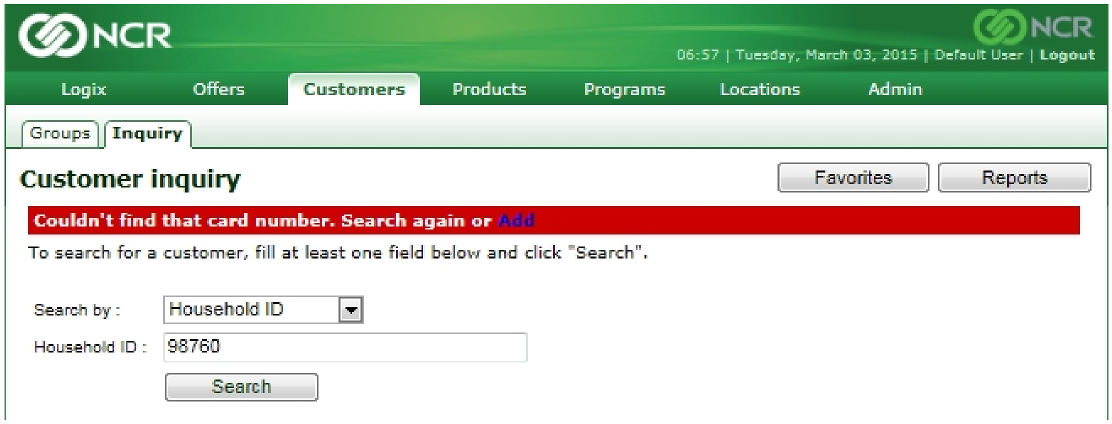


2. From the Search by drop–down list, select **Household ID**. The following page is displayed.



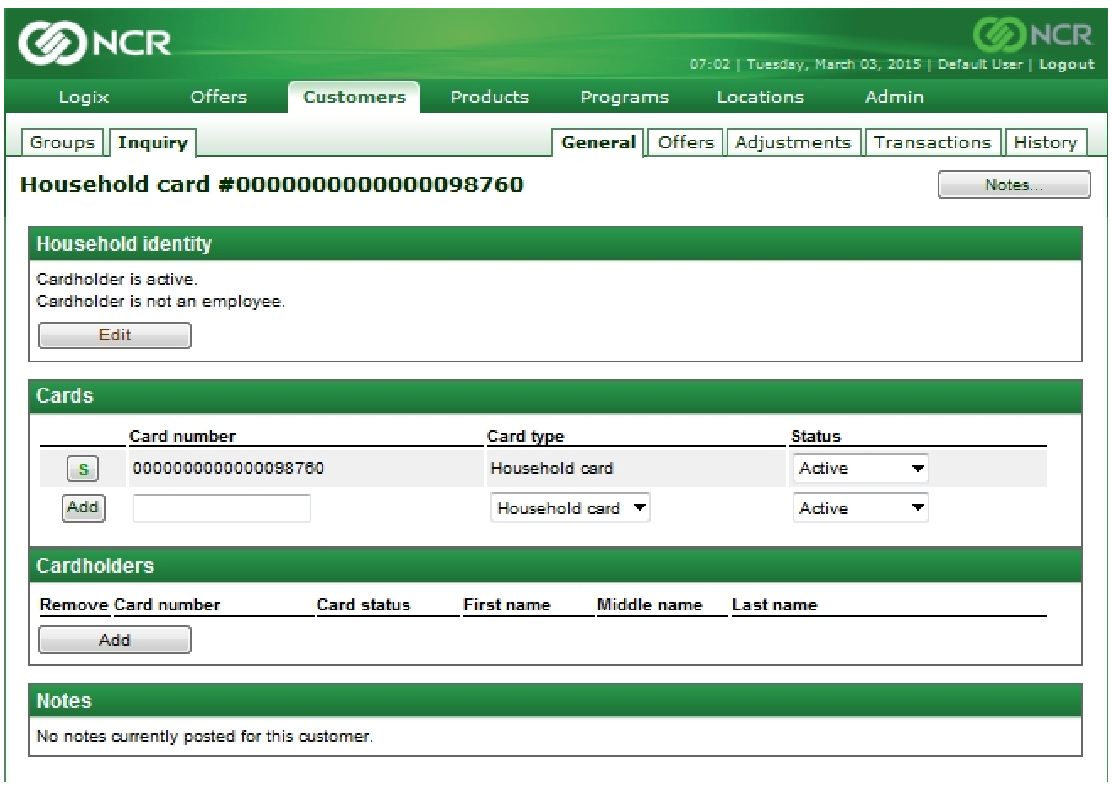
3. Enter the Household ID number.

4. Select **Search**. The application displays the following page:



Note: If the Add function is not available, enable the **Allow customer record creation if not found in customer inquiry** option. For more information, refer to *Customer Options* on page 713.

5. Select **Add**. The corresponding household record page is displayed as shown in the following example:



From the Household Record page, do any of the following:

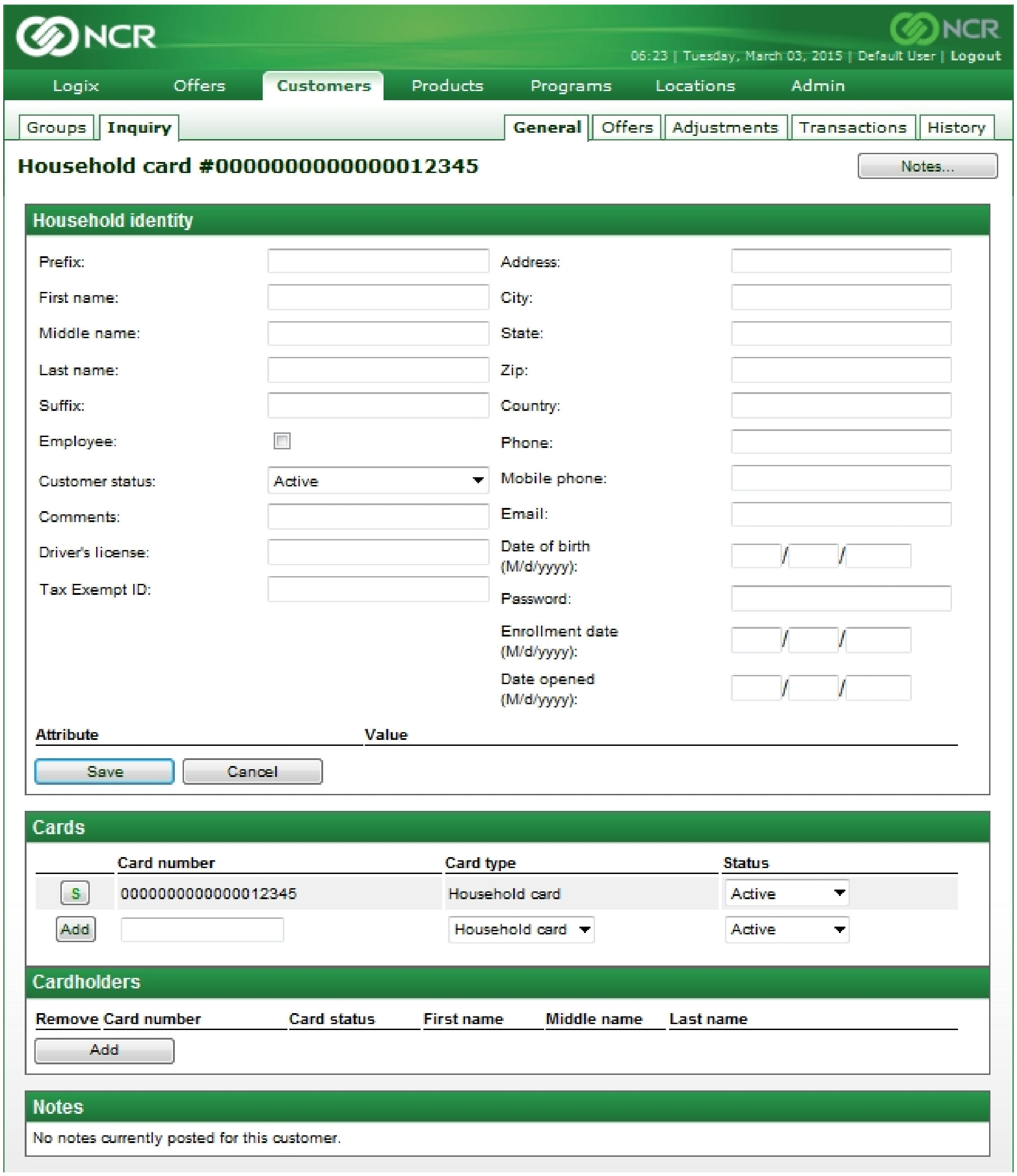
- Add household information or details. For more information, refer to *Adding Information for Households* on the next page.
- Add household cards. For more information, refer to *Adding Household Cards* on page 380.
- Modify a card status. For more information, refer to *Modifying Household Card Status* on page 381.
- Add household members. For more information, refer to *Adding Household Members* on page 379.
- Remove a household card. For more information, refer to *Removing Household Cards* on page 381.

Adding Information for Households

To add information for households, follow these steps:

Note: This procedure assumes that the customer data does not exist in the system.

1. From the Household Record page, select **Edit**. The Household Identity page is displayed.



Note: If the Attribute drop–down list is disabled, contact an NCR Professional Services Consultant.

2. Enter the household information in the corresponding fields.
3. Select **Save**. The Household Record page is updated with the Household name.

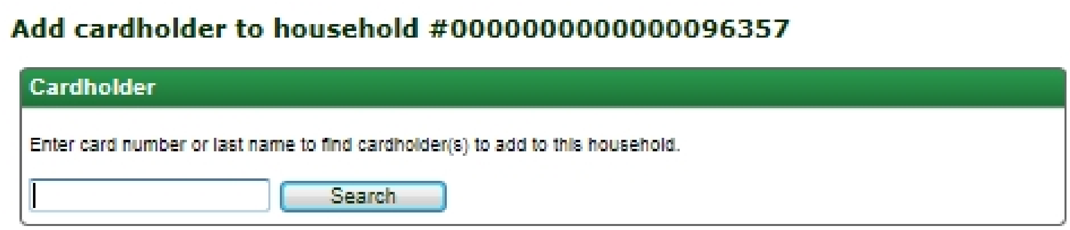
Adding Household Members

The Household Record page displays a cardholders section that lists the customers who are members of the household.

Note: Depending on the installation configuration, adding a customer to or removing a customer from a household may transfer balances to or from the household.

To add a household member, follow these steps:

1. In the Cardholders section of the Household Record page, select **Add**. The application displays the Cardholder window.

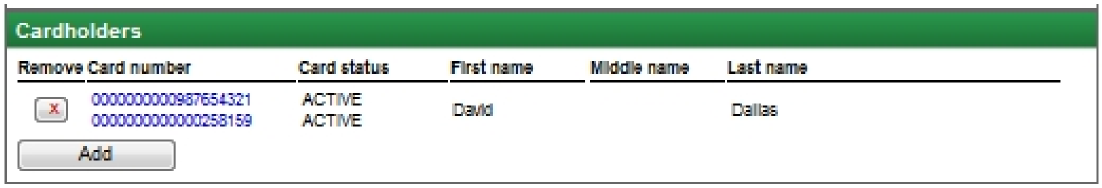


2. Enter the card number or last name in the Search field.
3. Select **Search**. The application displays the corresponding cardholder details.

4. Select the **Add** check box that corresponds with a specific customer.

Note: If multiple results are displayed, multiple check boxes can be selected.

5. Select **Add**. The application displays the selected customer in the Cardholders section.



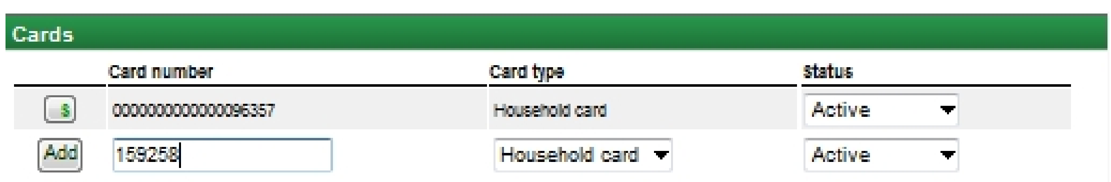
6. Do any of the following options to either remove or demote a cardholder:
   - **Remove**—cleanly disassociates the customer from the household and performs transfers of continuity balances, copies offer group membership eligibility, transfers reward accumulation, and copies reward distribution based on the settings in the Customer Update Agent. For more information, refer to *Agents* on page 789.
   - **Demote**—disassociates the customer from the household and performs transfers of continuity balances. This function is based on the setting of the "Household continuity demotion policy" Customer Option. For more information, refer to *Customer Options* on page 713.

Note: If the Demote option is not available, set the Household continuity demotion policy option to **Demote on any card removed (manual)**.

Adding Household Cards

Depending on the system configuration, a household can be associated with multiple cards. To add a card associated with a household, follow these steps:

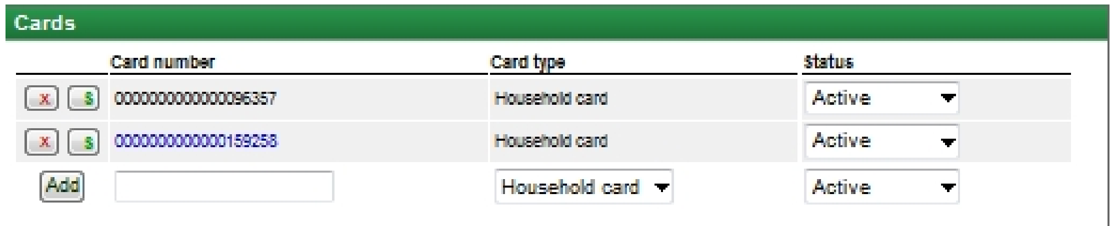
1. In the Cards section of the Household Record page, enter the card number in the corresponding field, as shown in the following example:



Note: If the card number already exists in the system, an error message is displayed.

2. From the Status drop–down list, select a card status.

3. Select **Add**. The household card is added to the list of cards associated with the household.



Modifying Household Card Status

To make changes to a household's card status, follow these steps:

1. In the Cards section of the Household Record page, select a card status from the corresponding Status drop–down list.
   - **Expired**
   - **Lost/Stolen**
   - **Default Card**
   - **Active**
   - **Inactive**
   - **Canceled**
2. Select the **S** button to apply the update.

Removing Household Cards

To remove a household card, follow these steps:

Note: The permission to remove a card depends on the current user's permission.

1. In the Cards section of the Household Record page, select the **X** button of the corresponding card. A confirmation window is displayed.
2. Select **OK**. The card is deleted from the Cards list.

Customer Offer Eligibility

The Offers Eligibility sub–page displays a list of offers in which the customer or household can participate. To access the Offers Eligibility sub–page, select the **Offers** sub–page tab from either of the following pages:

- Customer Record page
- Household Record page

The following example shows the Offers Eligibility sub–page for a customer:

Note: Select the **Notes** button to create or view notes about the Customer or Household. For more information, refer to *Using the Notes Function* on page 703.

The Customer Offers Eligibility sub–page displays a list of offers with the following details:

Column Heading	Description
Favorites	Indicates a favorite offer with a blue star. Favorite offers are displayed by default when selecting the Offers Eligibility sub–page tab. Depending on the permission settings, users can set offers as favorites by selecting the Star icon. For more information, refer to *Favorite Offers* on page 399.
Remove offer	Removes the customer from the group and offer.
View	Displays the customer's redemption history for the selected offer.
Adjustments	Displays buttons that indicate stored value, points, or accumulations. **Note:** The buttons are only displayed if the offer is associated with a points program, stored value program, or accumulation adjustment. For information on adjusting the points balance of a customer in relation to an offer, refer to *Adjusting Points Balance through Offers Tab* on page 392.
ID	Displays the Offer number.

Column Heading	Description
Offer	Displays the Offer name.
Status	Describes the current status of an offer in the development process. The status can be any of the following types: • **Active**—indicates that the offer is "live" and in production. • **Expired**—indicates that the end date of the offer has passed.
Customer group	Displays customer group that also uses the offer. The customer is a member of this group.

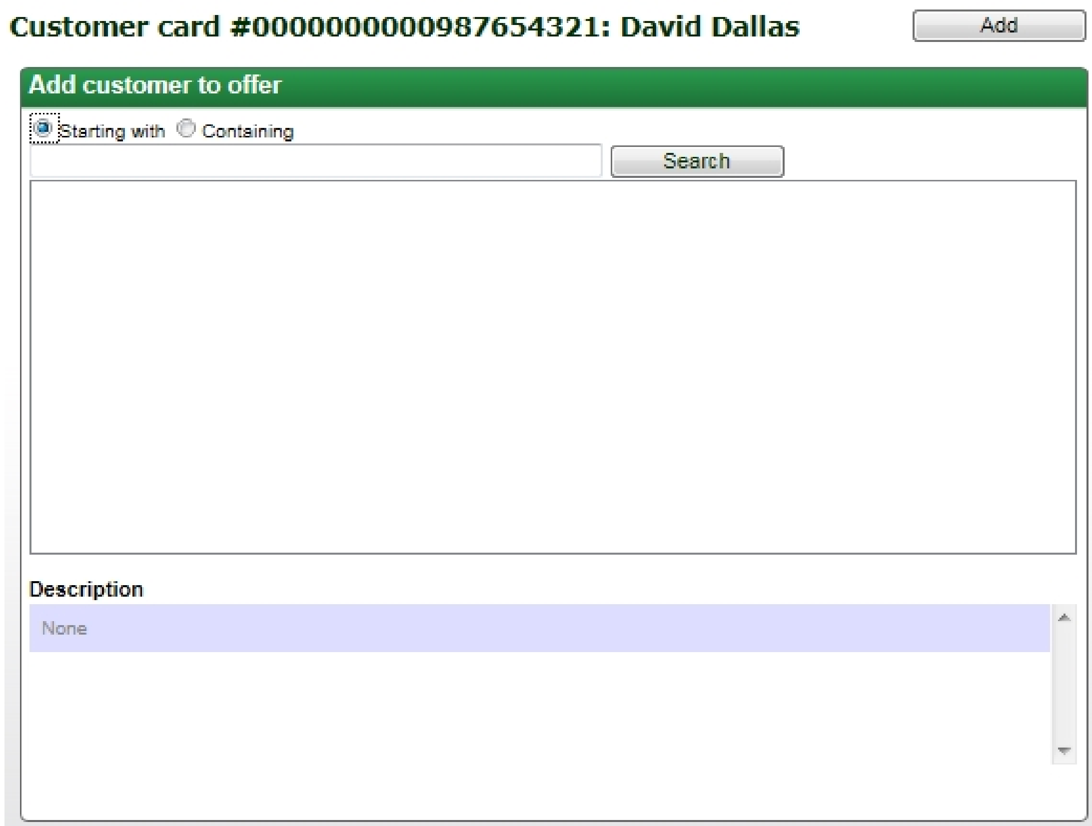
To manage the information in the Customer Offers Eligibility sub–page, use the following controls:

- **Search**—allows users to search for offers using various criteria.
- **Pagination controls**—allows users to select the page views displayed in the window. These controls are enabled when there are more offers to display.
- **Filter drop–down list**—specifies the Offers to be displayed in the Offers Table based on the following criteria:
  - **Show all offers**—displays all offers in Logix that are either Active or Expired.
  - **Show favorite offers**—displays all offers that were included in the Favorites settings.
  - **Show all but expired**—displays offers only with Active offers.
  - **Show offers with credit**—displays only offers that have a balance in at least one program. For example, points, stored value, or accumulation.
  - **Show active targeted offers**—displays a list of offers in which the customer card belongs.

Adding Customer Offer Eligibility

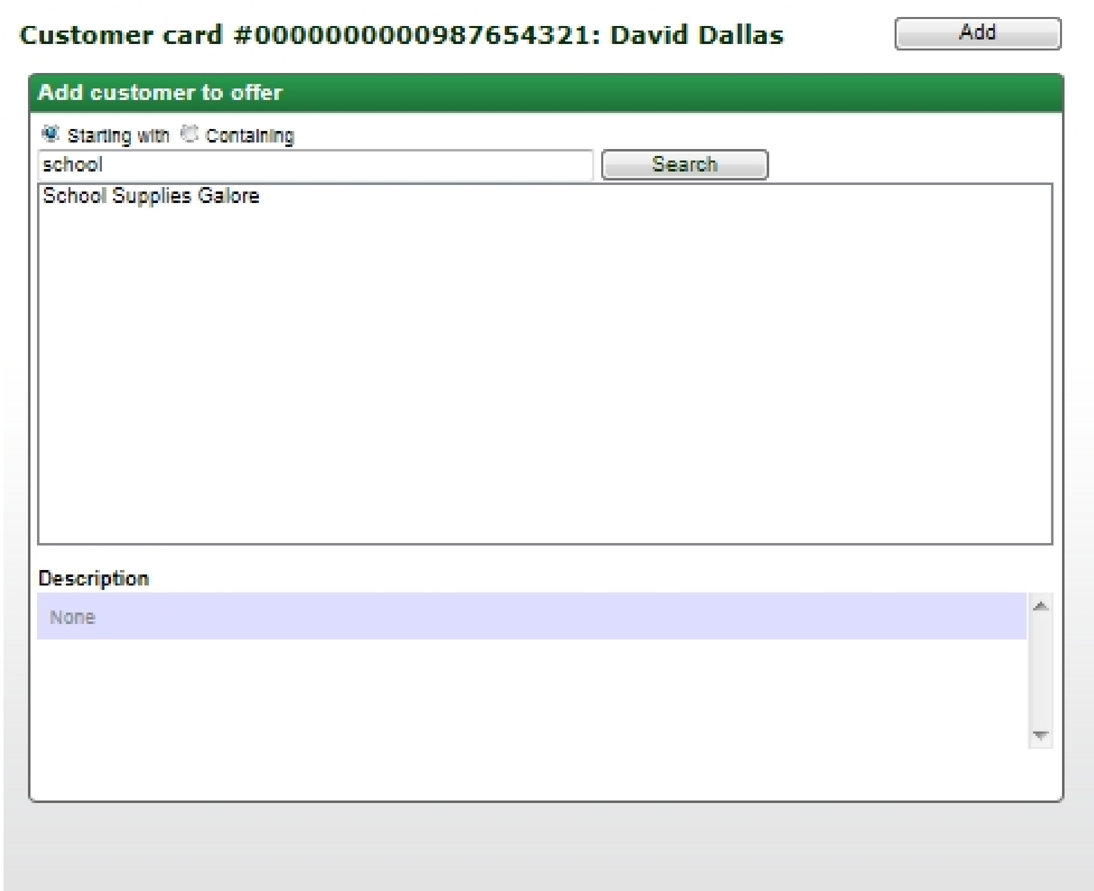
To add an offer in which a customer or household can participate, follow these steps:

1. From the Offers Eligibility sub–page, select **Add offer . . . .** The application displays the following window:



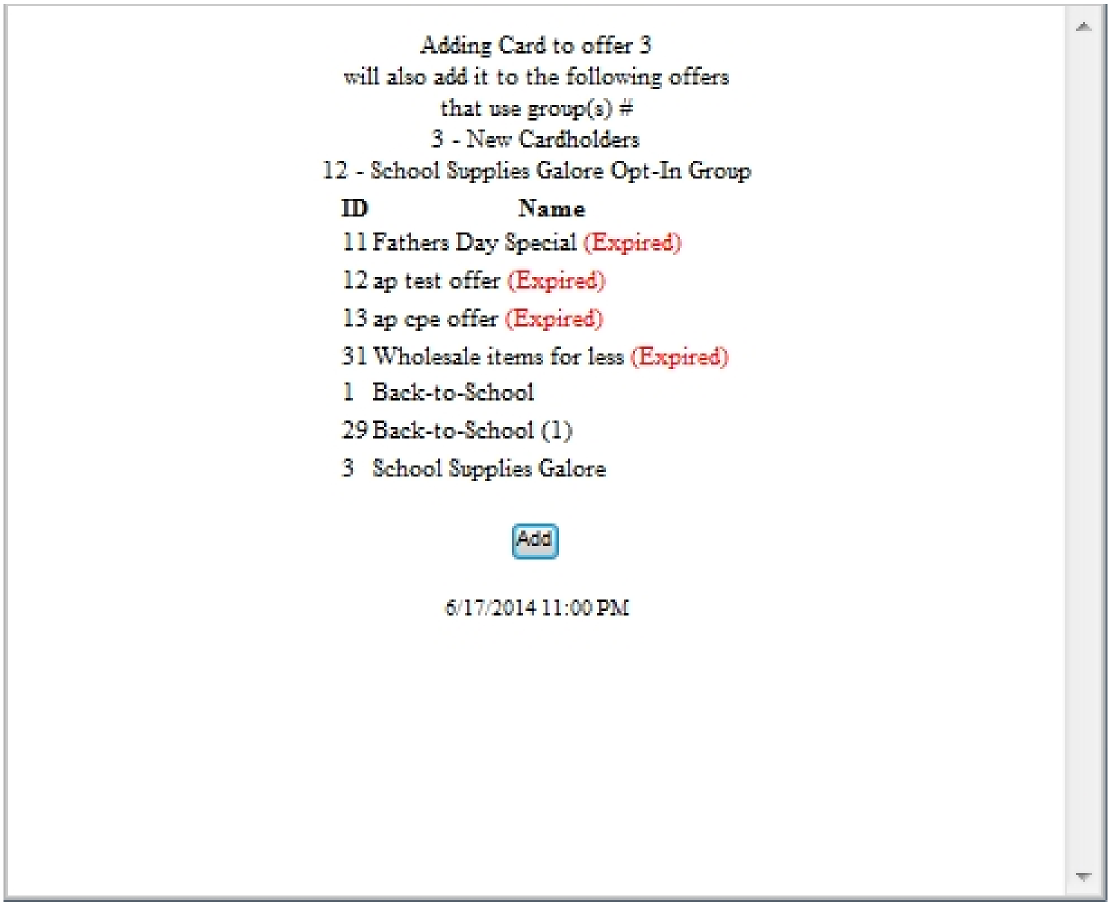
2. Select a search criteria radio button and then, enter the corresponding terms in the Search field.

3. Select **Search**. The following example shows the offers that matched the search criteria.



Note: Only offers with Active status are displayed.

4. Highlight the offer and then, select **Add**. The application displays the offer details, as shown in the following example:

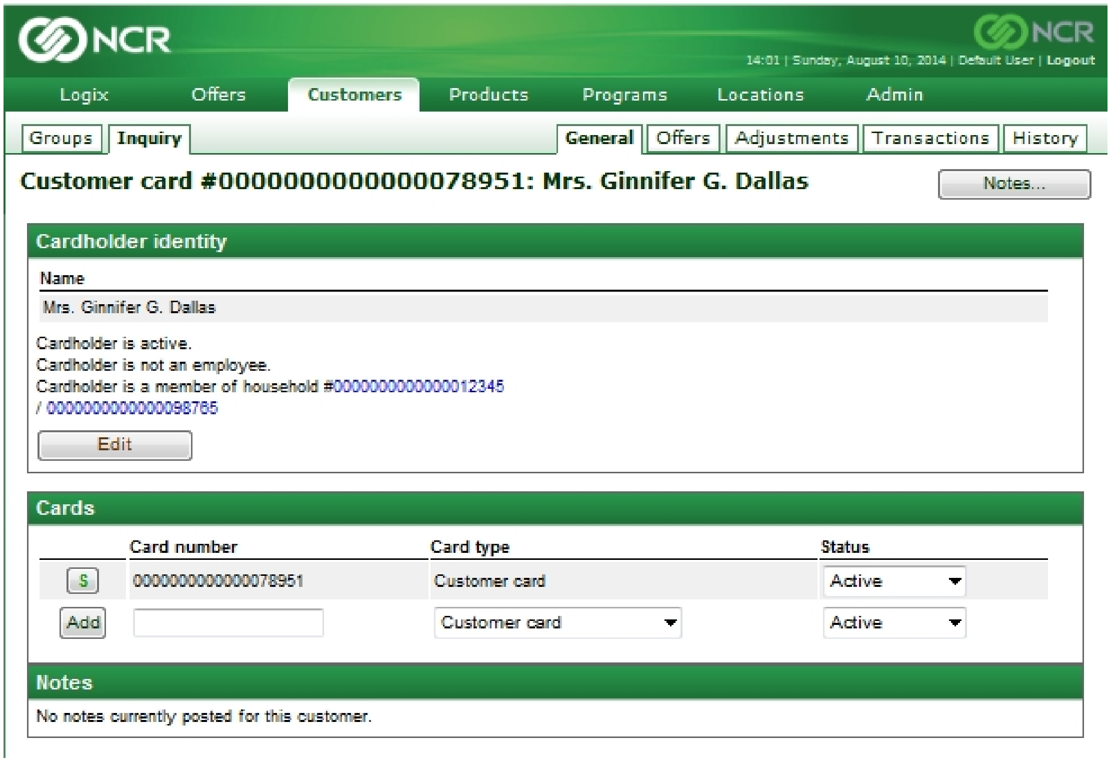


5. Select **Add**. The offer is added in the Customer Offers Eligibility sub–page.

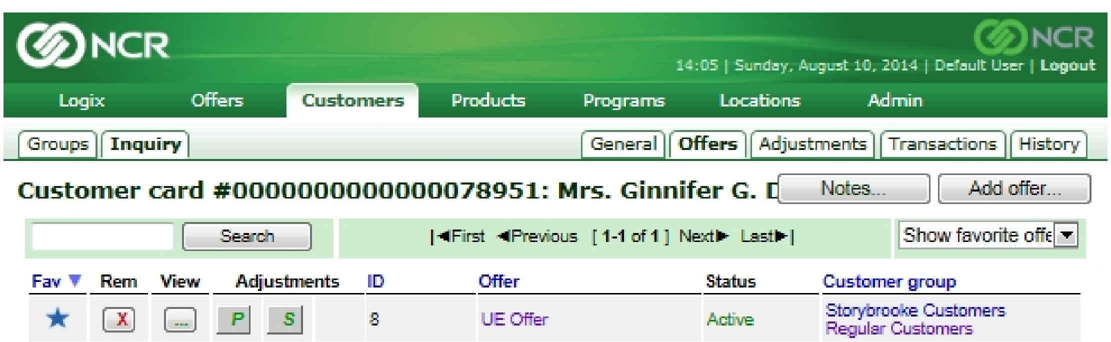
Removing Customer Offer Eligibility

To remove offers from the Offers Eligibility table, follow these steps:

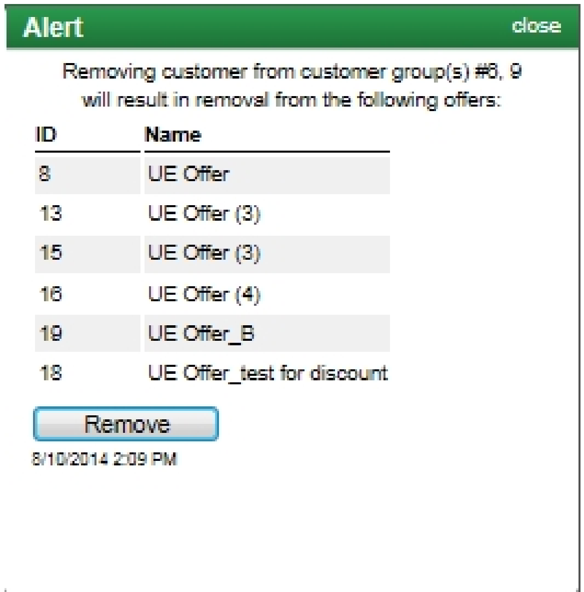
1. From the Customer Inquiry page, search for the customer record. The corresponding Customer Record page is displayed, as shown in the following example:



2. Select the **Offers** sub–page tab. The Customer Offers Eligibility sub–page is displayed.



3. In the Remove column, select the **X** button of the corresponding offer. A confirmation window is displayed.

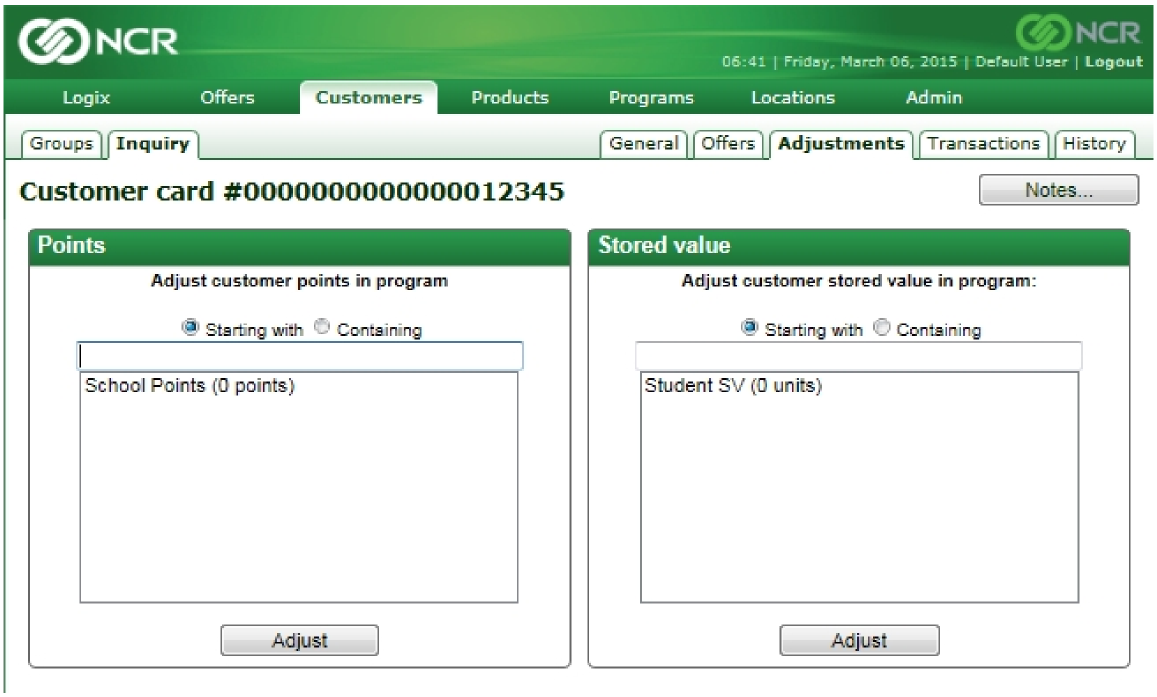


4. Select **Remove**.

Adjustments

Use the Adjustments sub–page to adjust the individual points programs and stored value programs in which the customer has balances, plus the balance in each one.

From the Customer Record page, select the **Adjustments** sub–page tab. The Customer Adjustments sub–page is displayed.



Note: Select the **Notes…** button to view or create notes about the customer. For more information, refer to *Using the Notes Function* on page 703.

Adjusting Points Balance

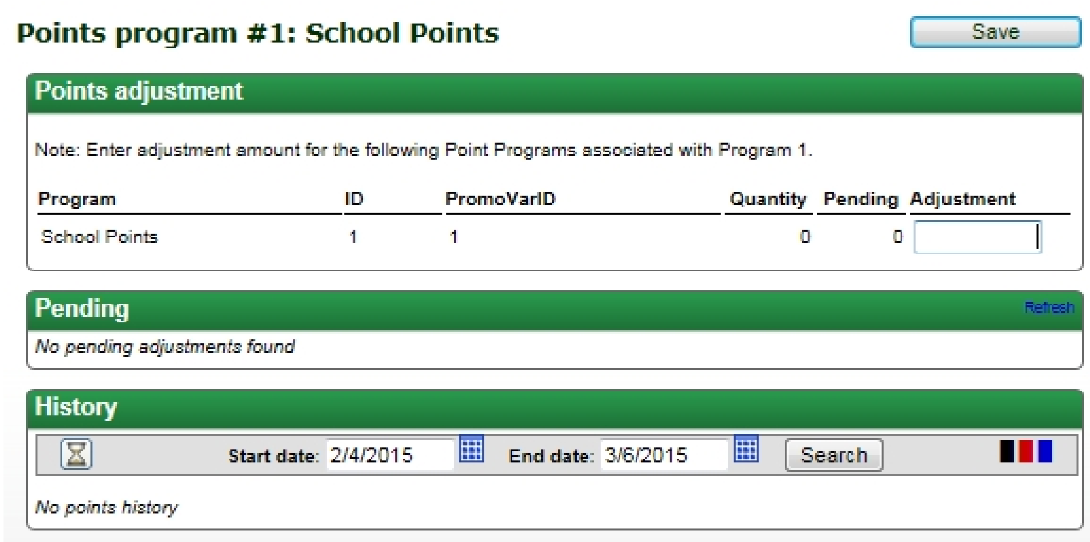
There are two ways to adjust the points balance of a customer:

- Through the Adjustments tab—performed at the program level.
- Through the Offers tab—performed at the offer level.

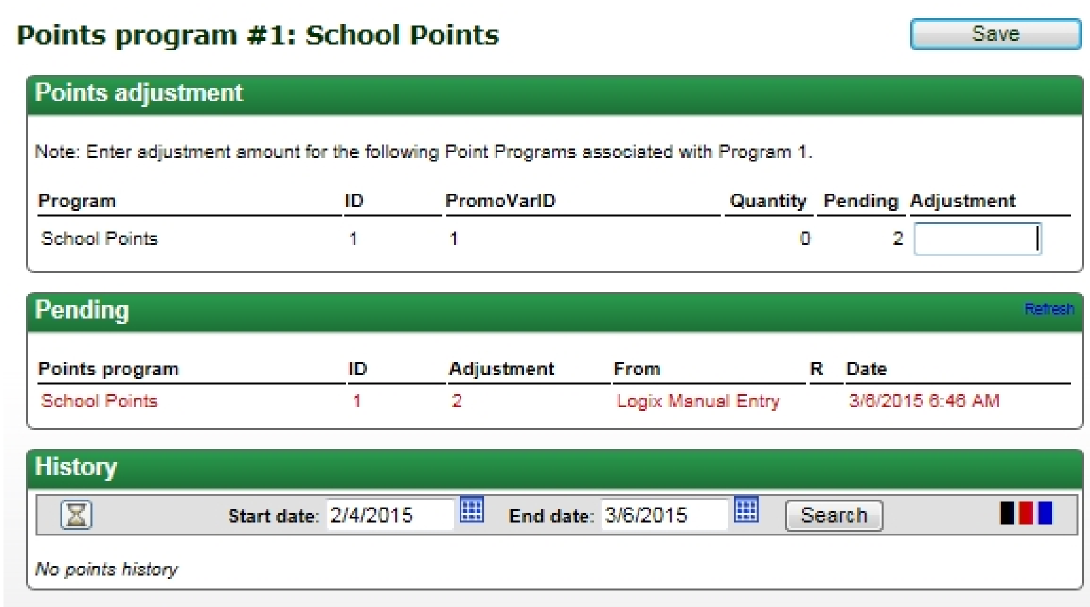
Adjusting Points Balance through Adjustments Tab

To adjust the points balance of a customer through the Adjustments tab, follow these steps:

1. From the Adjustments sub–page, highlight a points program and then, select **Adjust**. The corresponding Adjustment window is displayed.



2. Enter a value in the Adjustment box and then, select **Save**. The adjusted Points Program details are displayed in the Pending section for processing, after which the adjustment details are displayed in the History section. Processing may take a few minutes.

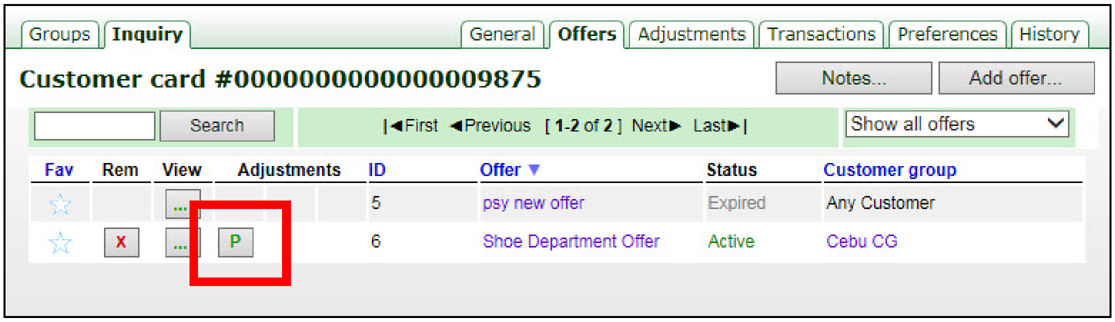


Note: To lower a balance, enter a negative value.

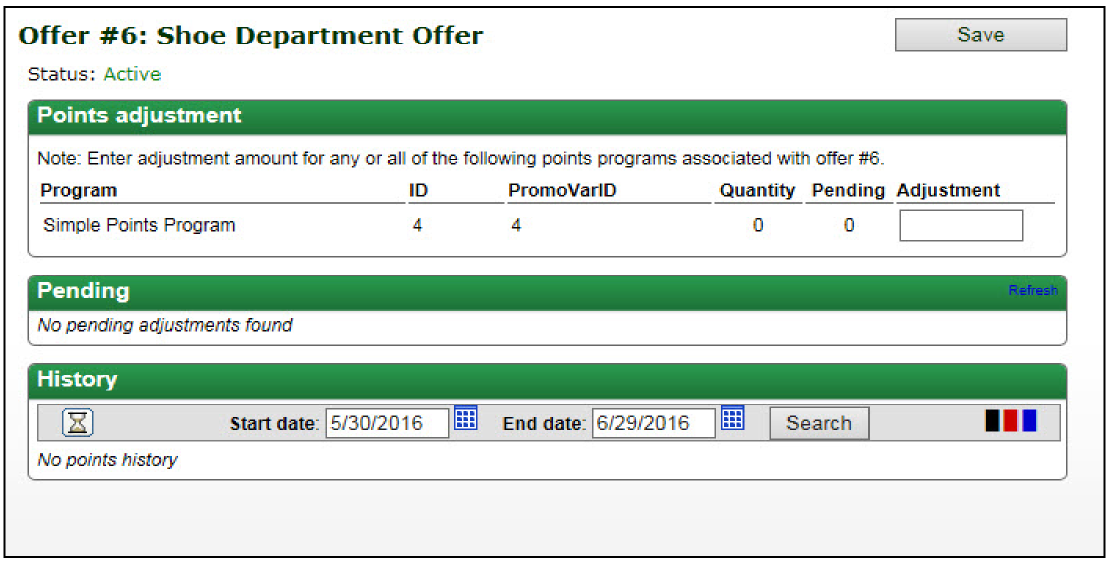
Adjusting Points Balance through Offers Tab

To adjust the points balance of the customer through the Offers tab, follow these steps:

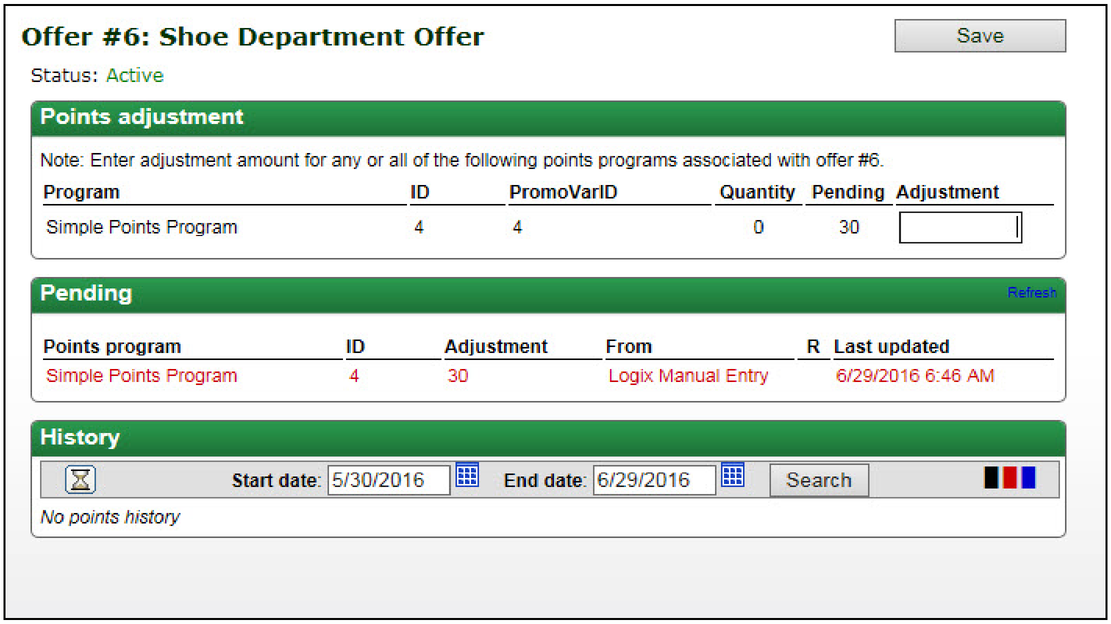
1. From the Offers sub–page, select the **Adjust points** button of the offer.



The following window is displayed.

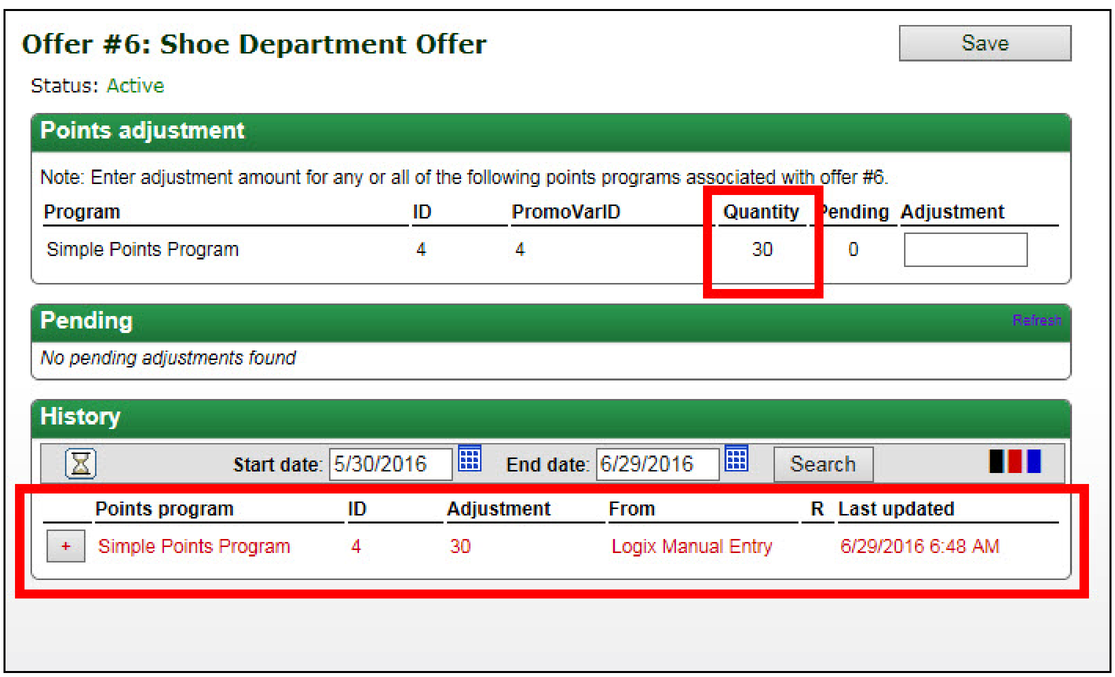


2. Enter a value in the **Adjustment** box and then, select **Save**. The details of the points balance adjustment of the offer are displayed in the Pending section for processing, which may take a few minutes.



Note: To lower a balance, enter a negative value.

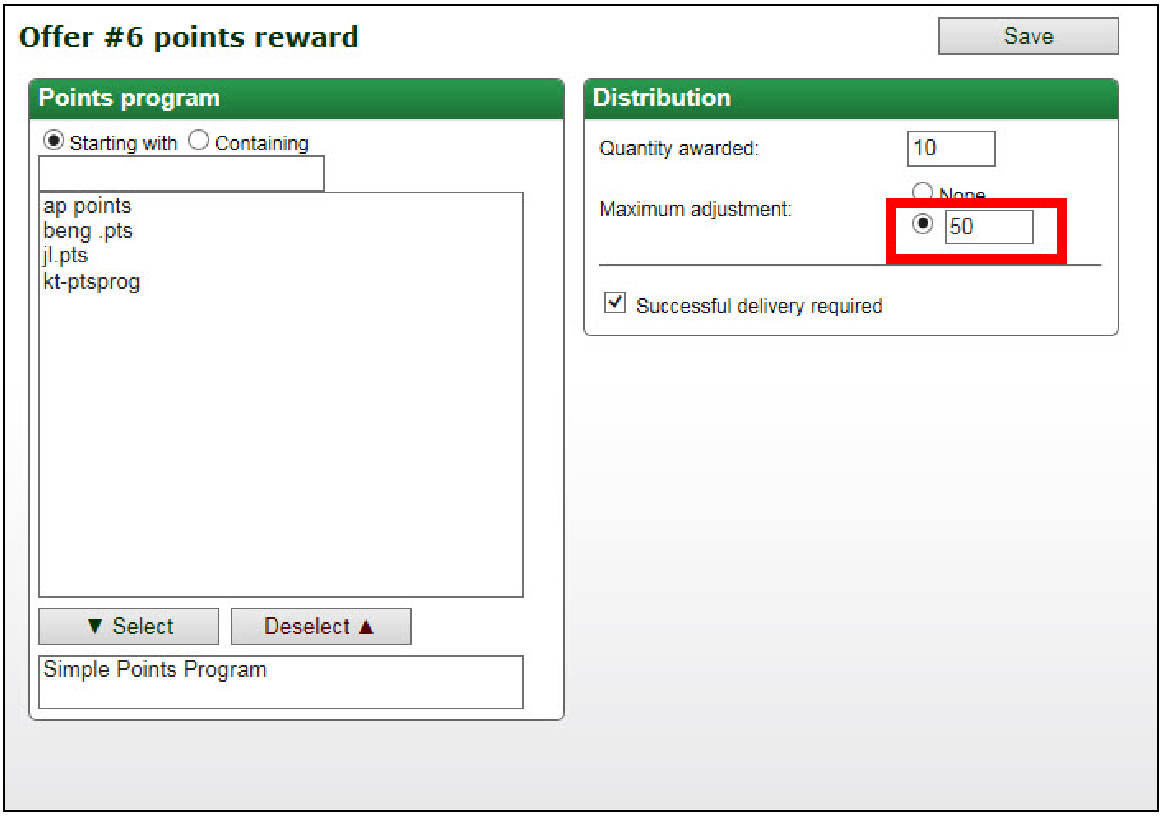
After the adjustment is processed, it is displayed in the History section and the adjustment is reflected in the Quantity column of the Points adjustment section.



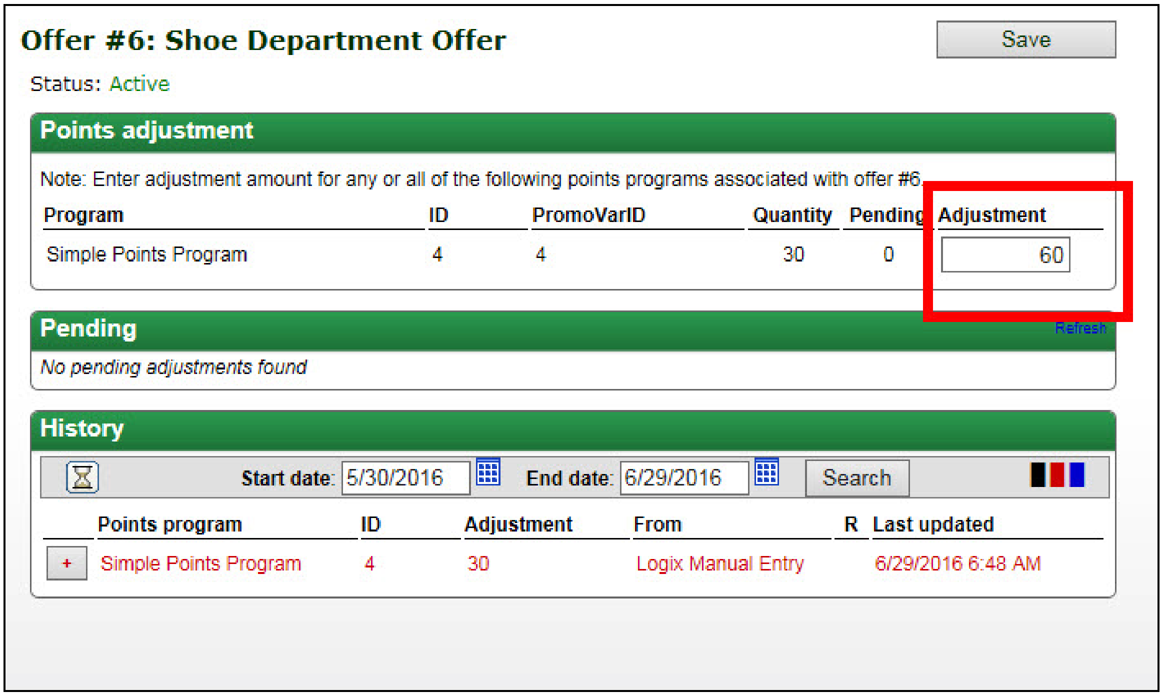
Exceeding Maximum Adjustment of the Points Reward

The retailer can adjust the points balance of the customer even if the value exceeds the **Maximum adjustment** set in the Points Reward of the offer.

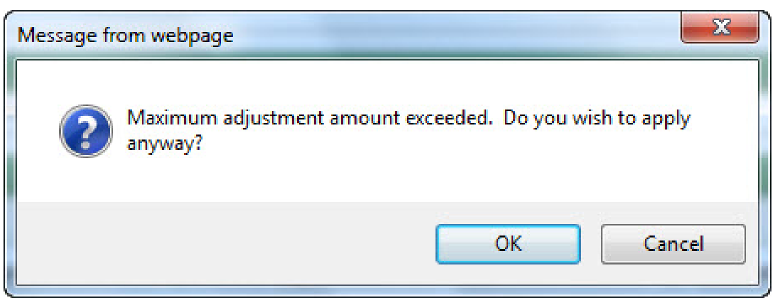
Example: The Maximum adjustment value of a Points Reward of an offer is set to 50, as shown in this example.



In setting the **Adjustment** value using the Customer Inquiry page, the value is more than 50, as shown in this example.



When the retailer selects **Save**, the following window is displayed.



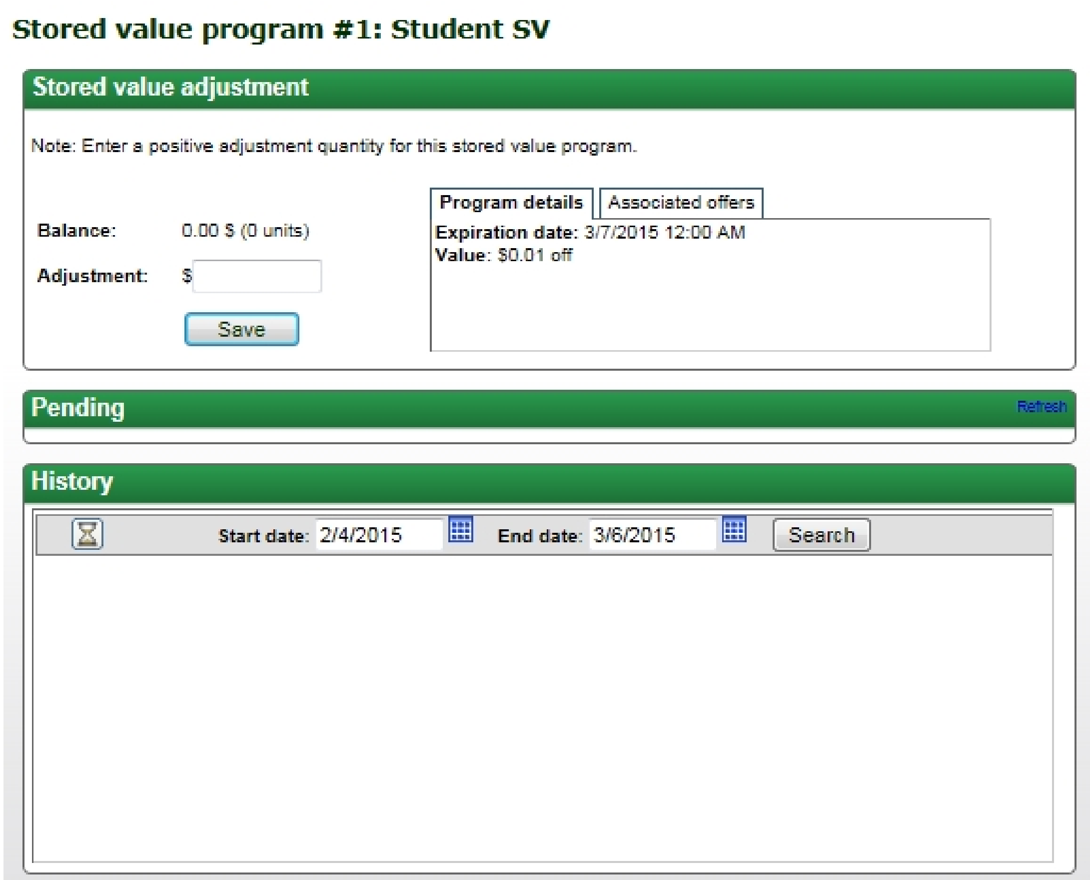
Selecting **OK** saves the changes. The adjustment is then displayed in the Pending section for processing.

Note: The retailer may adjust the points balance with values that are equal, more than, or less than the Maximum adjustment value in the Points Reward.

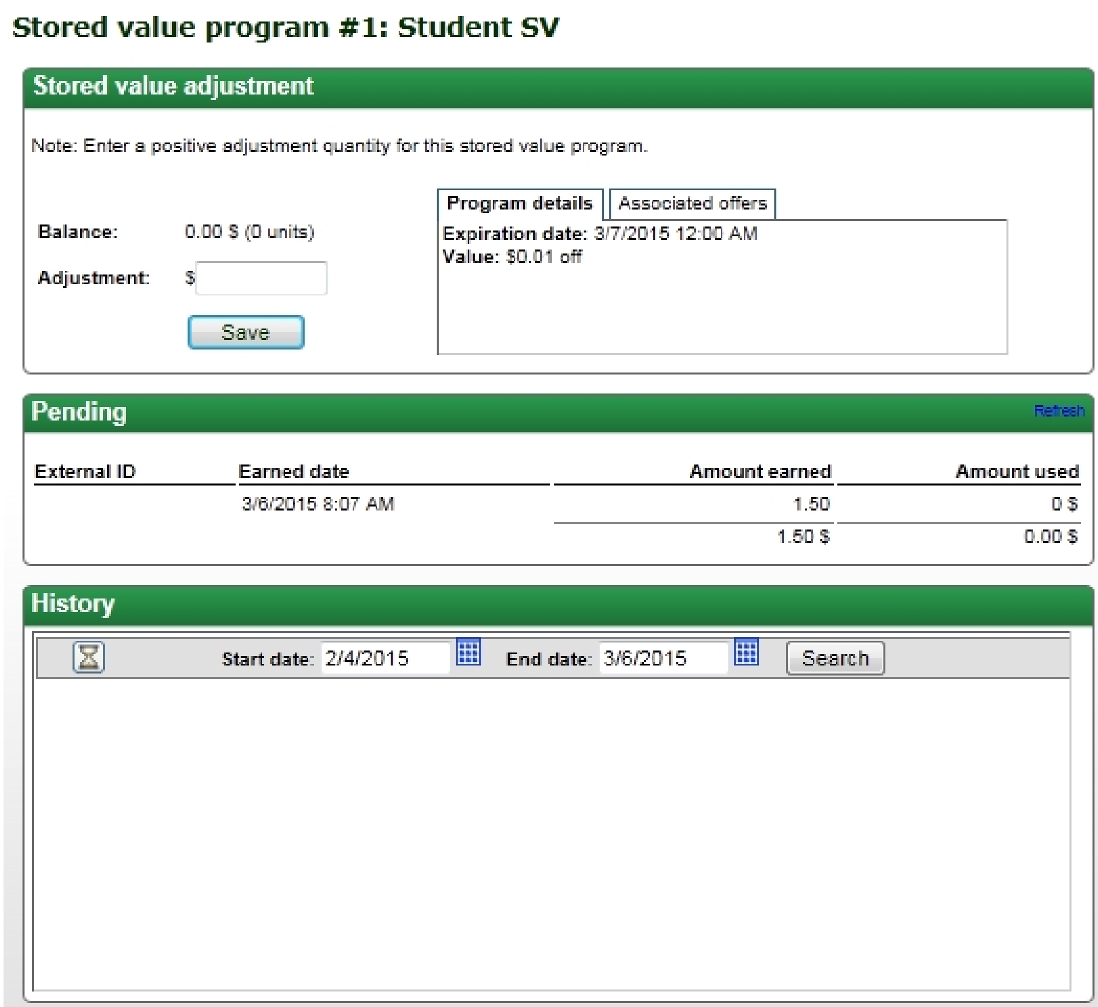
Adjusting Stored Value Balance

To adjust the Stored Value balance of a customer, follow these steps:

1. From the Adjustments sub–page, highlight a stored value program and then, select **Adjust**. The corresponding Adjustment window is displayed.



2. Enter a value in the Adjustment text box and then, select **Save**. The adjusted Stored Value Program details are displayed in the Pending section for processing, after which the adjustment details are displayed in the History section. Processing may take a few minutes to complete.

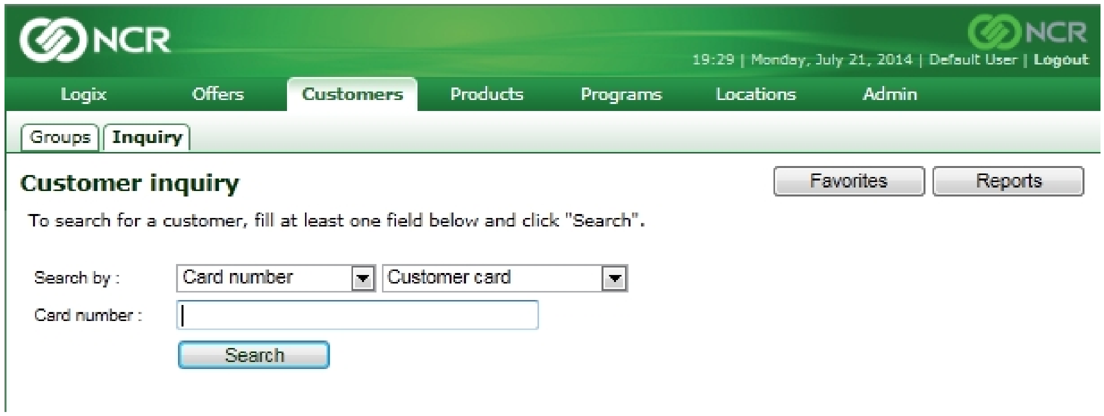


Note: To lower a balance, enter a negative value.

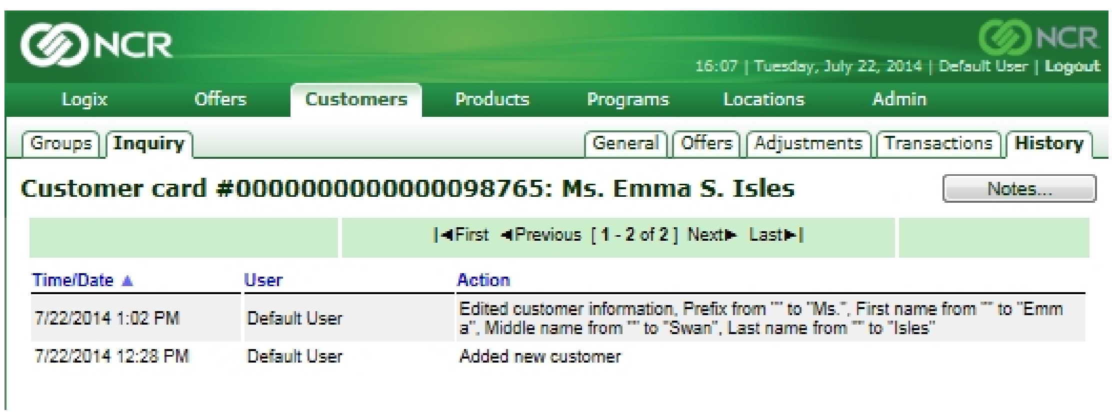
Tracking Customer Record Changes

To view history details of a customer, follow these steps:

1. From the Customer Configuration page, select the **Inquiry** page tab. The Customer Inquiry page is displayed.



2. Search the customer record. The application displays the Customer Record page. For more information, refer to *Performing Customer Inquiries* on page 367.
3. From the Customer Record page, select the **History** sub–page tab. The History sub–page is displayed, as shown in the following:



Favorite Offers

Using the Favorites functions, offers can be set to either of the following:

- **Personal favorite offers**—favorite offers that can be accessed only by a specific user.
- **Favorite offers for others**—favorite offers that can be accessed by multiple users.

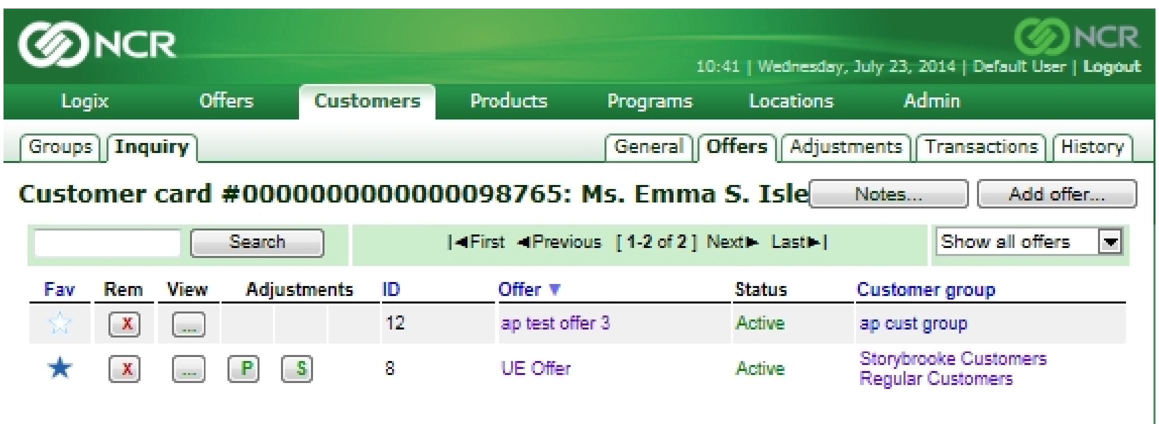
Setting popular offers as favorites displays them by default when accessing the Offers Eligibility page.

Setting Personal Favorite Offers

Personal favorite offers are displayed first when accessing a customer or household's Offers Eligibility sub–page. This feature helps users quickly reach frequently–used offers.

Note: This feature is accessible only to users with the right permission.

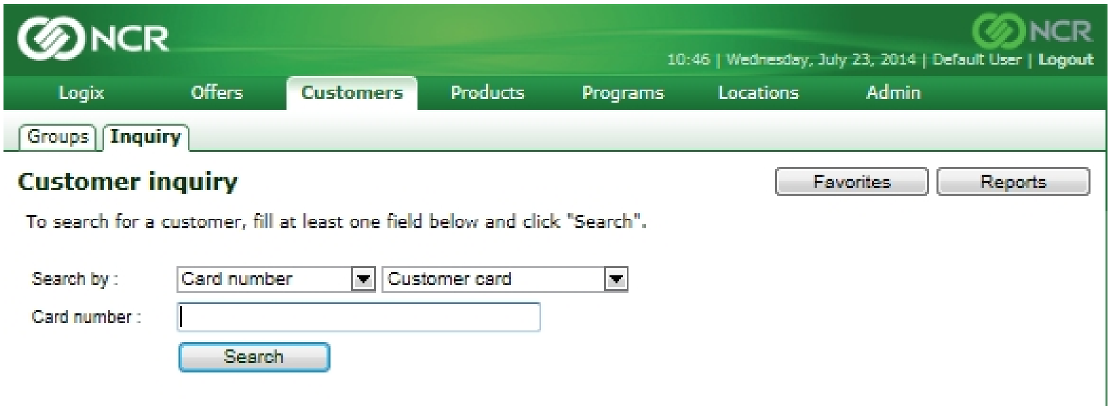
To set a list of personal favorite offers, select a Star icon from the Offers Eligibility sub–page. The icon turns to blue.



Setting Favorite Offers for Multiple Users

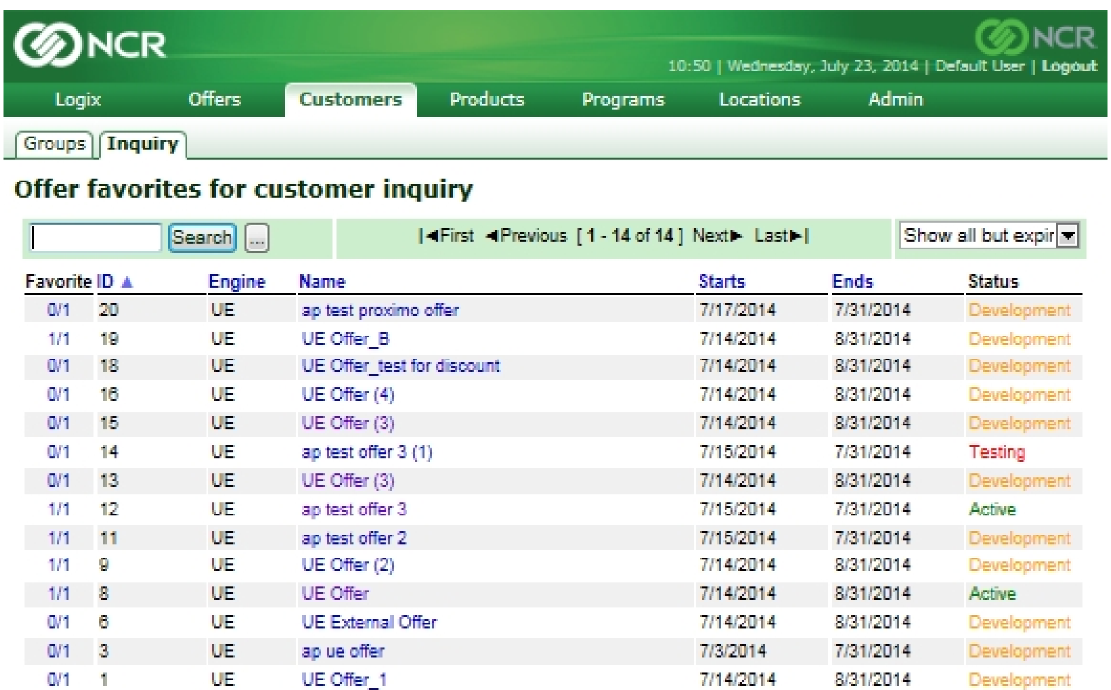
To set a list of favorite offers for multiple users, follow these steps:

1. From the Customers tab, select the **Inquiry** page tab. The Customer Inquiry page is displayed.

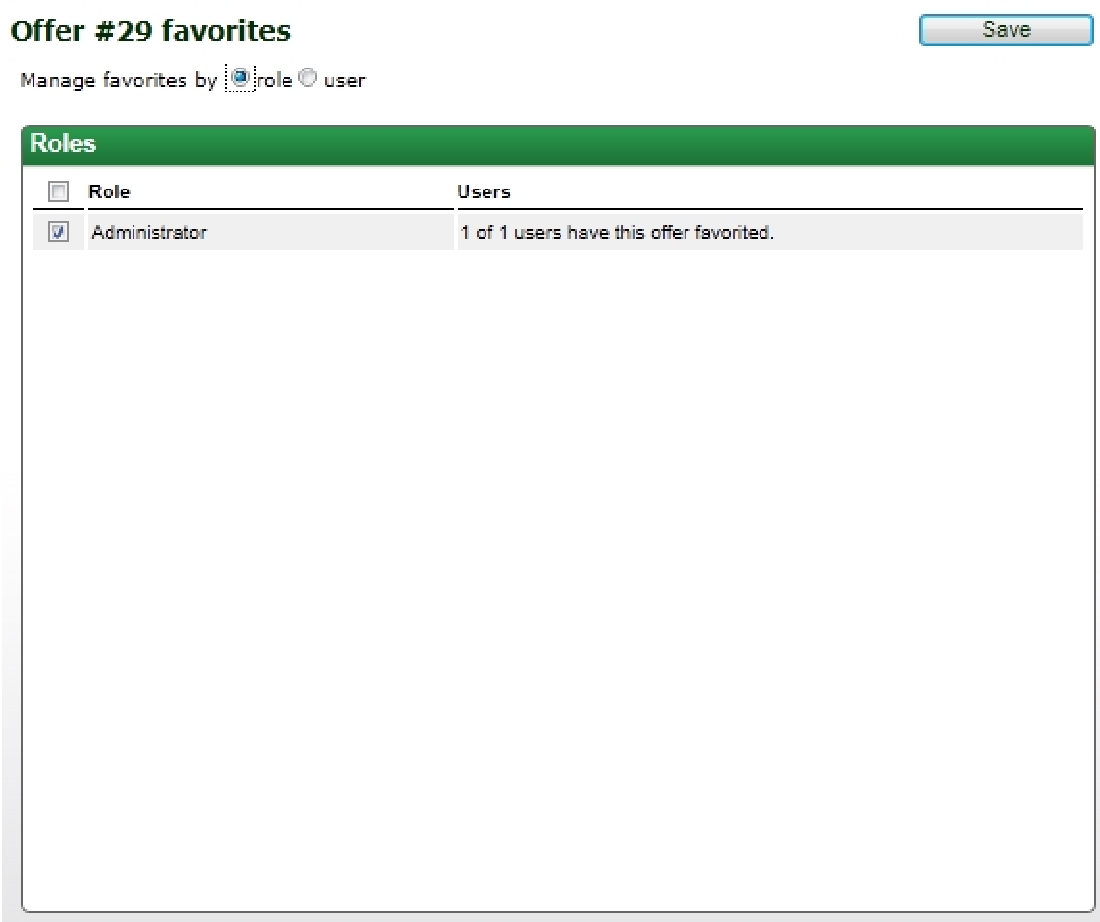


Note: To enable the Favorites button, ensure that the “favorite offers for others” permission is selected when configuring user roles. For more information, refer to *Configuring User Roles and User Accounts* on page 557.

2. Select the **Favorites** button. The Offer Favorites for Customer Inquiry page displays a list of offers.



3. Select a fraction hyperlink in the "Favorite" column of a corresponding offer.
   A pop–up window is displayed.



Note: Fraction hyperlinks indicate the number of users favoring the offer and the total number of users.

4. Select any of the following radio buttons:
   - **Role**—displays a list of existing roles in the system. This is the default option.
   - **User**—displays a list of existing users in the system.
5. Select the corresponding check box of either a role or a user.

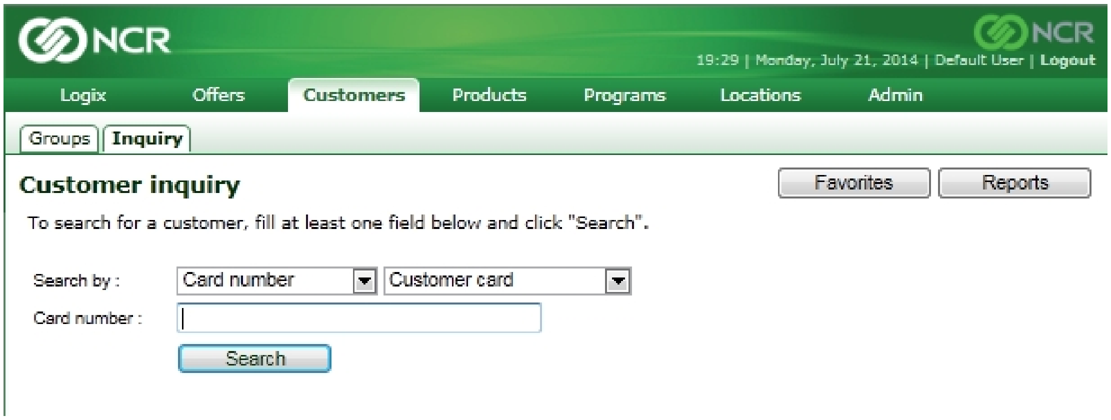
Note: A role and a user can also be selected.

6. Select **Save**.

Generating Adjustment Balance Reports

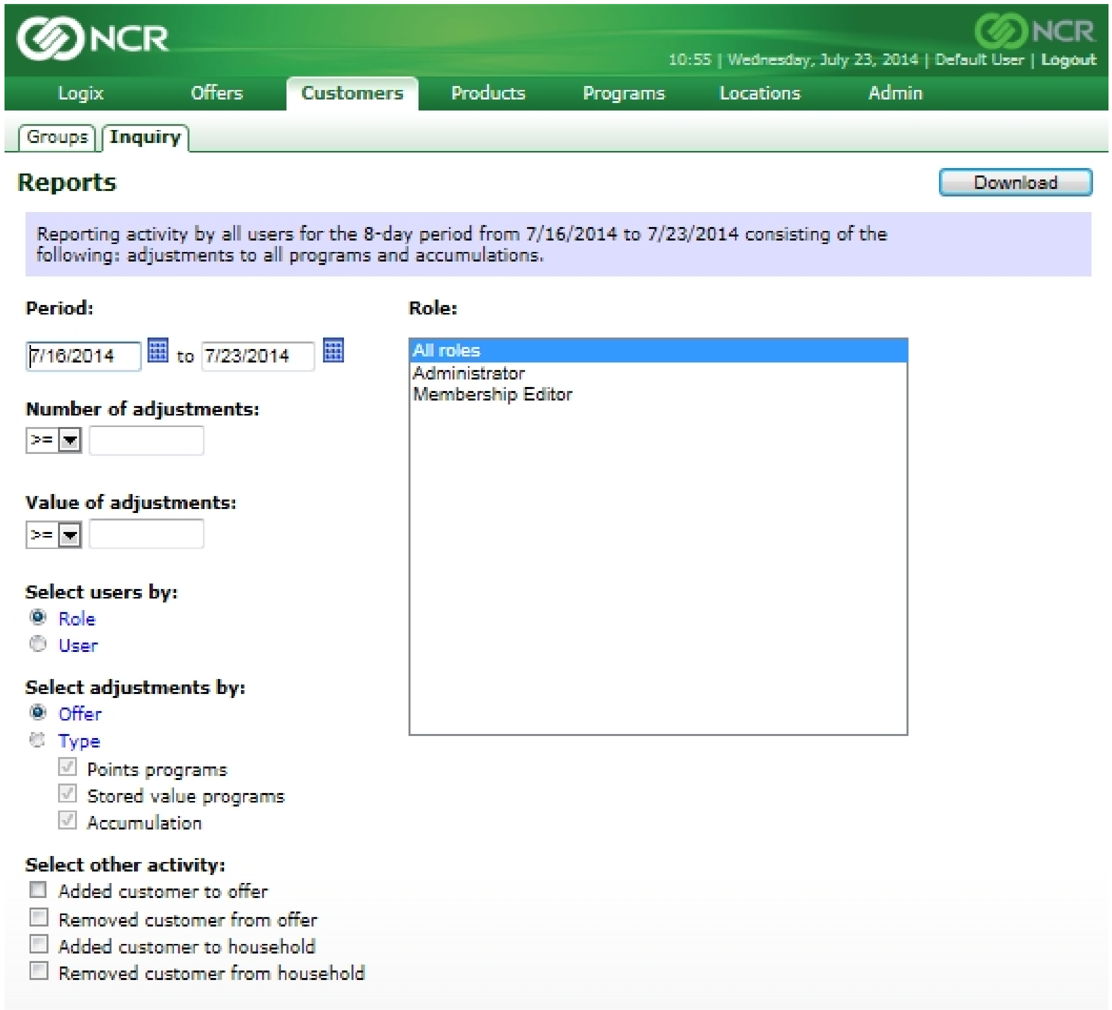
To generate reports on adjustments made to customers' balances made by Logix users, follow these steps:

1. From the Customers tab, select the **Inquiry** page tab. The Customer Inquiry page is displayed.



Note: To enable the Reports button, ensure that the "access customer inquiry reporting" permission is selected when configuring user roles. For more information, refer to *Configuring User Roles and User Accounts* on page 557.

2. Select the **Reports** button. The Customer Reports page is displayed.



3. Specify the criteria for the report based on the following:
   - Date range
   - Number of adjustments made
   - Value of each adjustment
   - Role
   - User
   - Points program
   - Stored value program
   - Other activities
4. Select **Download**. The application downloads the report in a CSV file.

Customer Locking

The Customer Locking feature permits retailers to lock customers from double–dipping into points, stored value, and offers with usage limitations, preventing the loss of money on points or stored value redemption. When customer locking is enabled in the system, locking the customer's account is possible during transaction.

Note: The customer locking feature is supported in systems with multiple promotion engines installed.

Locked customer accumulations

When a customer's account is locked, the following customer accumulations are locked for use:

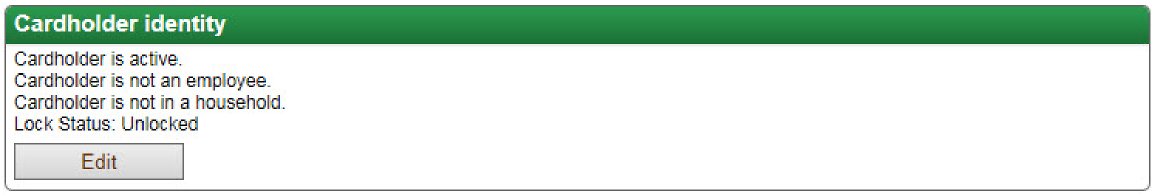
- Points
- Stored value
- Monetary stored value redemption
- Limited reward frequency

Lock information

When customer locking is enabled in the system, the Lock Status of a customer is displayed after a customer inquiry is performed.

Unlocked customer account

If the customer's account is unlocked, the following lock status is displayed.

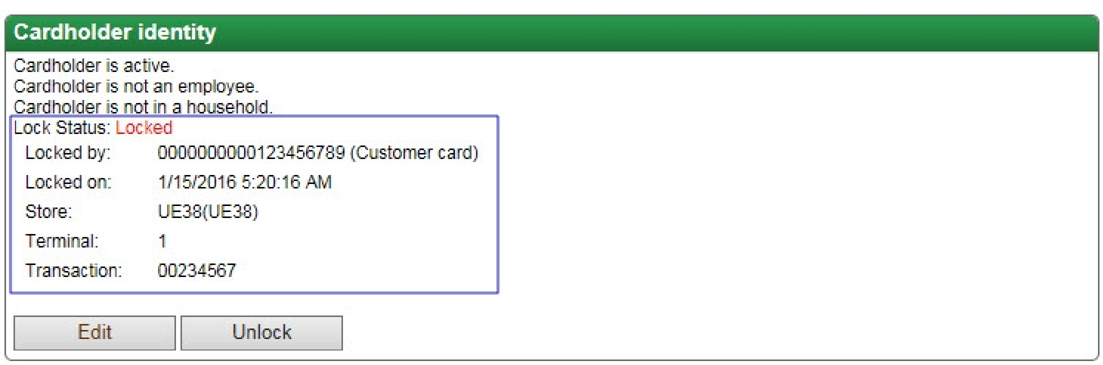


Locked customer account

When customer's accumulations are locked, the following lock information is displayed in the customer's account after customer inquiry is performed.

Lock information	Description
Locked by	Refers to the customer identifier of the customer who obtained the lock. The identifier can be a customer's loyalty card number or email.
Locked on	Refers to the timestamp (date and time) when the customer's account got locked.
Store	Refers to the store location where the customer's account got locked.
Terminal	Refers to the specific terminal of the store where the customer's account got locked.
Transaction	Refers to the transaction number of the transaction during which the customer's account got locked.

The following image displays a sample locked customer account.

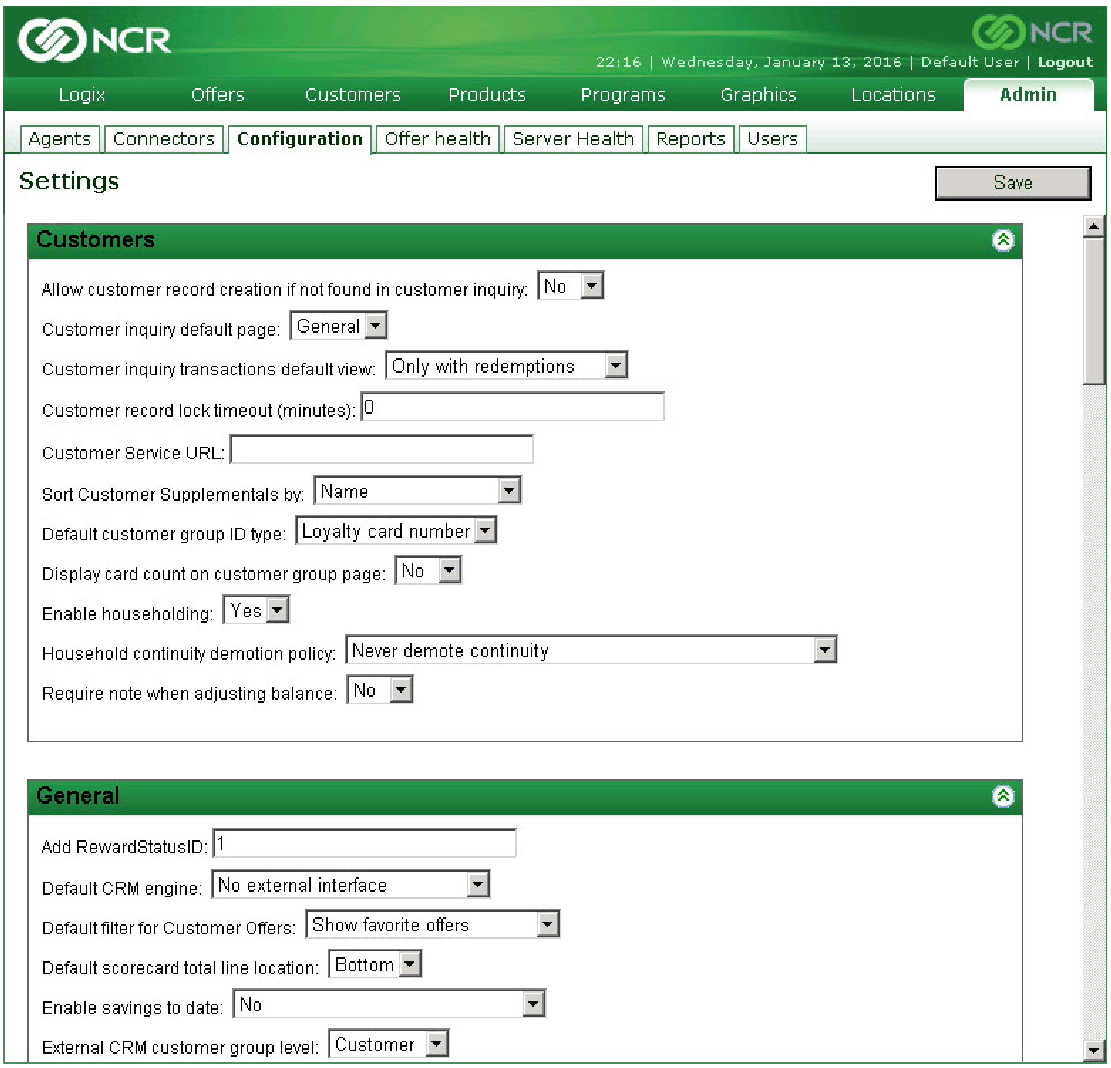


Configuring Logix for Customer Locking

To configure Logix for customer locking, follow these steps:

1. Configure the Visible setting of the UE_SystemOption 86 in the LogixRT database. To modify this setting, contact an NCR Professional Services Representative.

2. Log on to Logix and then go to **Admin→Configuration→Settings**. The Settings page is displayed.



3. Go to the **Customers** pane, and then set the **Customer Service URL** setting with the following value:

```
http://<customerbrokerIP>:8080/ams-broker-customer/customers/
```

   In this value, `<customerbrokerIP>` refers to the IP address of the server where the Customer Service is installed.

4. Select **Save**.

5. Select **Configuration→Settings: UE**. The UE settings page is displayed.
6. Go to the **Miscellaneous** pane and then set the **Enable customer locking** setting to **Yes**.
7. Select **Save**. Customer locking is now enabled in the system.

Customer unlocking

In case of system malfunctions or network loss, when a customer's accumulations may be locked, unlocking the customer's account is possible through auto unlock and force unlock.

Auto Unlock

When enabled, auto unlocking permits the system to automatically unlock all the locked customer accounts after a specific duration of time. By default, the duration for auto unlock is set to zero. To set a duration for auto unlock, follow these steps:

1. Configure the Visible setting of the **SystemOptions 68** in the LogixRT database to 1. To modify this setting, contact an NCR Professional Services Representative.
2. Log on to Logix and then go to **Admin→Configuration→Settings**. The Settings page is displayed.
3. Go to the **Customers** pane, and then set the **Customer record lock timeout (minutes)** setting.
4. Select **Save**.

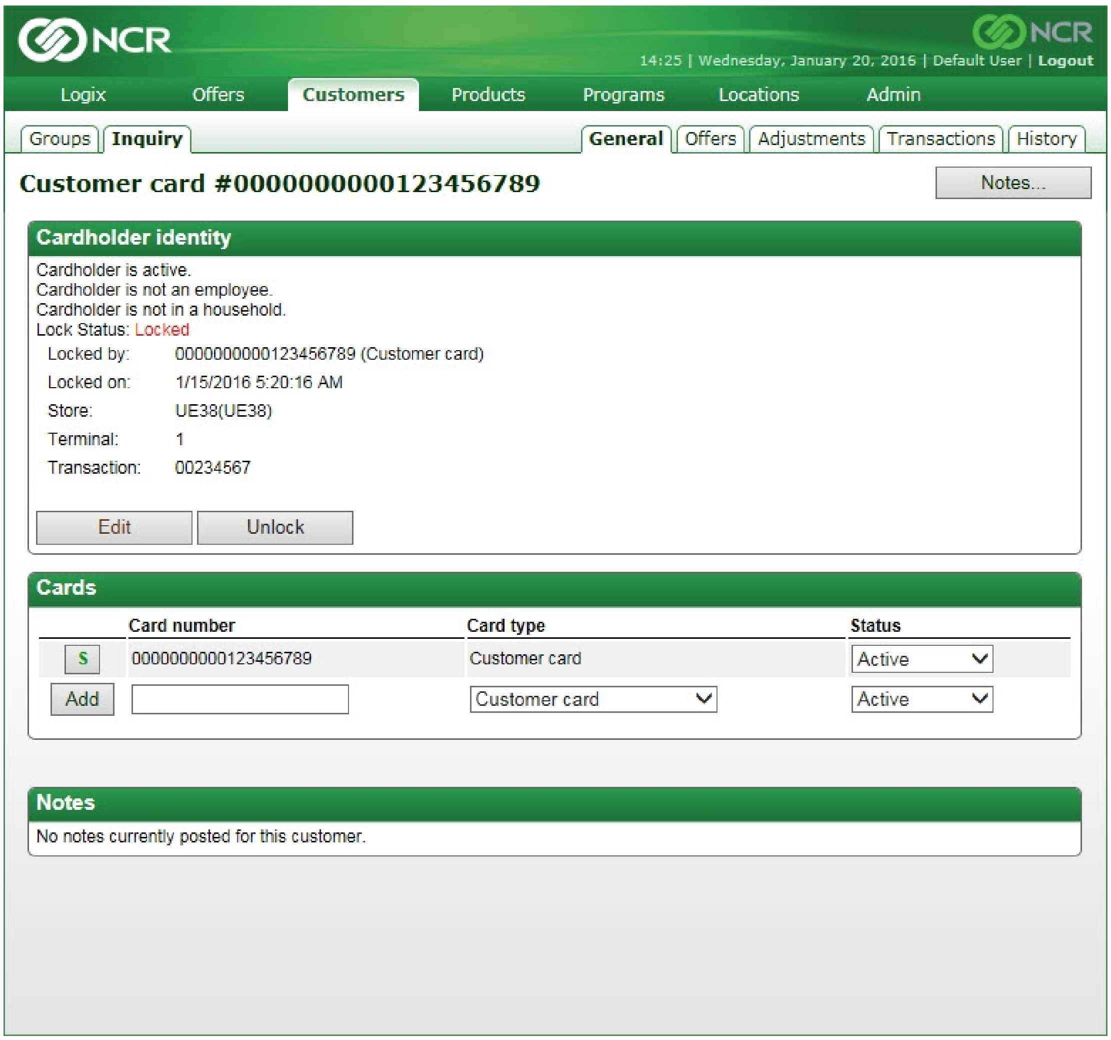
Force Unlock

If auto unlock duration is not set in the system, cashiers and customer representatives can force unlock the customer's accumulations to be able to use them in the transaction. Cashiers can unlock a customer's account at the terminal, while customer representatives can unlock the account through the Logix UI.

To unlock a customer's account through the Logix UI, follow these steps:

1. Perform a customer inquiry of the customer's account. For more information, refer to *Performing Customer Inquiries* on page 367.

   The Customer Record page is displayed.



2. In the identity pane, select **Unlock**. The customer's account is now unlocked.

Creating Customer Records in Transactions

When a new customer signs up for a loyalty account at the store, and immediately uses the loyalty card, which is assigned with a customer ID, in their first transaction, the new customer can avail of only the All Customer offers because the customer ID does not exist in the customer database yet.

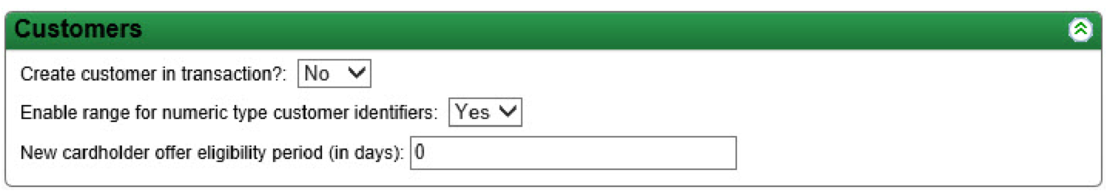
Logix provides retailers the option to either to continue this behavior for new customers, or to automatically create the customer record associated with that customer ID during the transaction and then allow the new customer to take advantage of the existing offers and programs.

The automatic creation of customer records in transactions is possible only if it is enabled in the system.

Enabling the Automatic Creation of Customer Records

To enable the automatic creation of customer records in transactions, follow these steps:

1. In Logix, select **Admin→Configuration→Settings: UE**. The system displays the UE settings page.
2. Go to the **Customers** section, and then set the **Create customer in transaction?** setting to **Yes**.



3. Select **Save**.
4. In the Logix database, enable the card types to allow the automatic creation of customer records during transaction when the card type is used. For assistance on configuring the Logix database, contact an NCR Professional Service (PS) representative.

If the *Create Customer in Transaction* setting is set to *Yes*, and the new customer presents a card that is enabled for automatic creation of customer record in the database, the customer's record is created if the customer ID that is associated with the card passes the validation.

Validating the Customer ID

The customer ID must be validated first before a customer record is created. The customer ID is validated according to the following categories:

- **Uniqueness**—the customer ID does not exist yet in the customer database. If the customer ID is added to the system, Logix ensures that no duplicate customer ID is added to the system.
- **Length**—the customer ID length does not exceed the associated card type's maximum length.
- **Left zero padded**—the customer ID is padded with zeroes if the length is less than the defined maximum length of customer IDs.
- **Numeric or alphanumeric**—the customer ID contains only numeric or alphanumeric characters.

Note: Numeric type card identifiers may be validated further if a card range is set in the system. For more information, refer to the next section.

Setting the range for numeric customer identifiers

In Logix, retailers can set the **range limit** of the numeric type customer IDs for each card type. If the range is set, a customer record is created during a transaction only if the customer ID falls within that range.

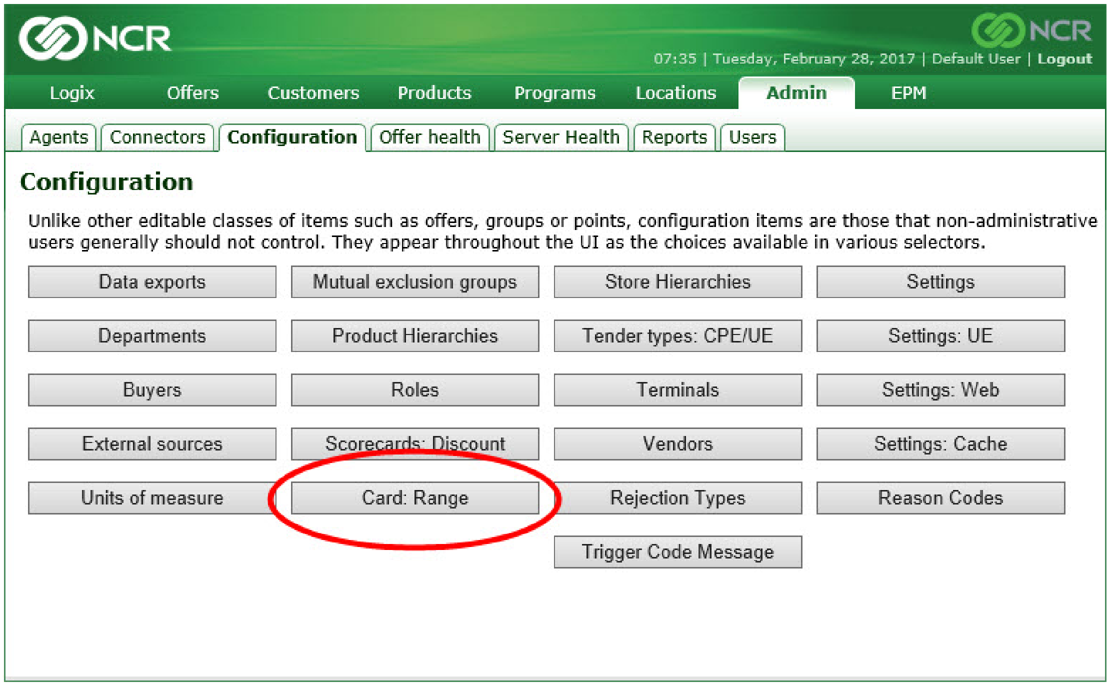
To set the range, follow these steps:

1. In Logix, select **Admin→Configuration→Settings: UE**. The system displays the UE settings page.
2. Go to the **Customers** section.

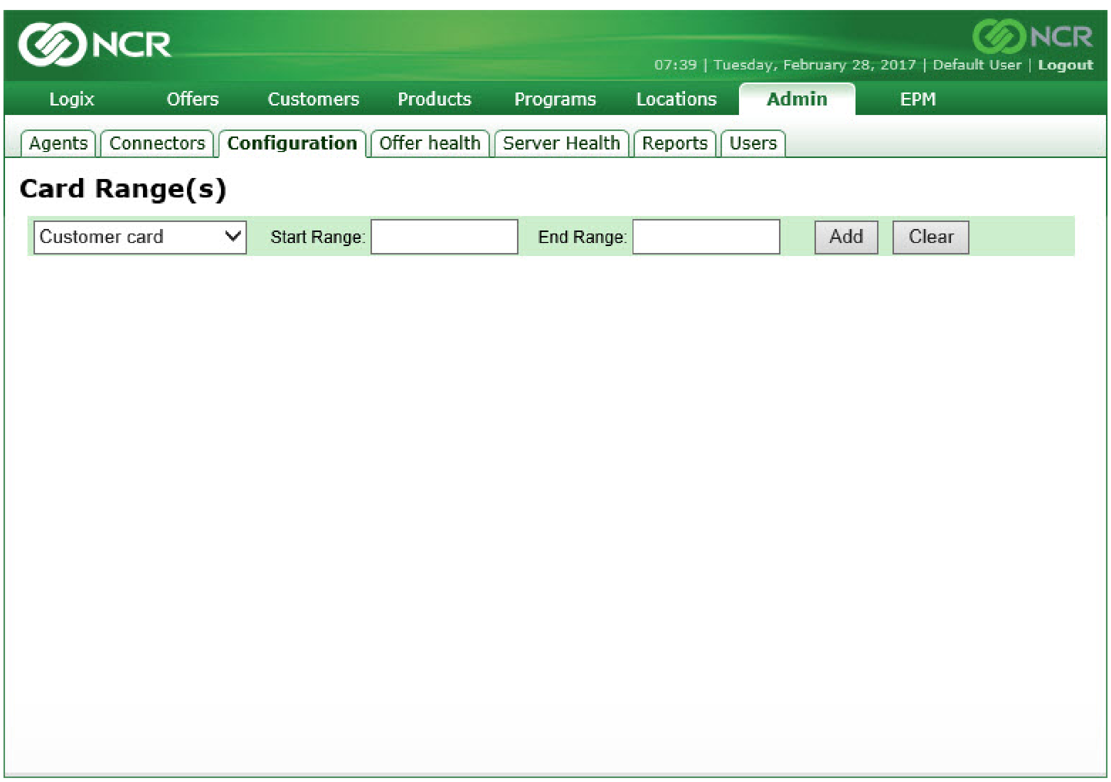
3. Set the **Enable range for numeric type customer identifiers** setting to **Yes**.
4. Select **Save**.

5. Select the **Configuration** tab. The system now displays the **Card: Range** option.

Note: This option is displayed only if the *Enable range for numeric type customer identifiers* UE setting is set to *Yes*.



6. Select **Card: Range**. The system displays the Card Range(s) page.

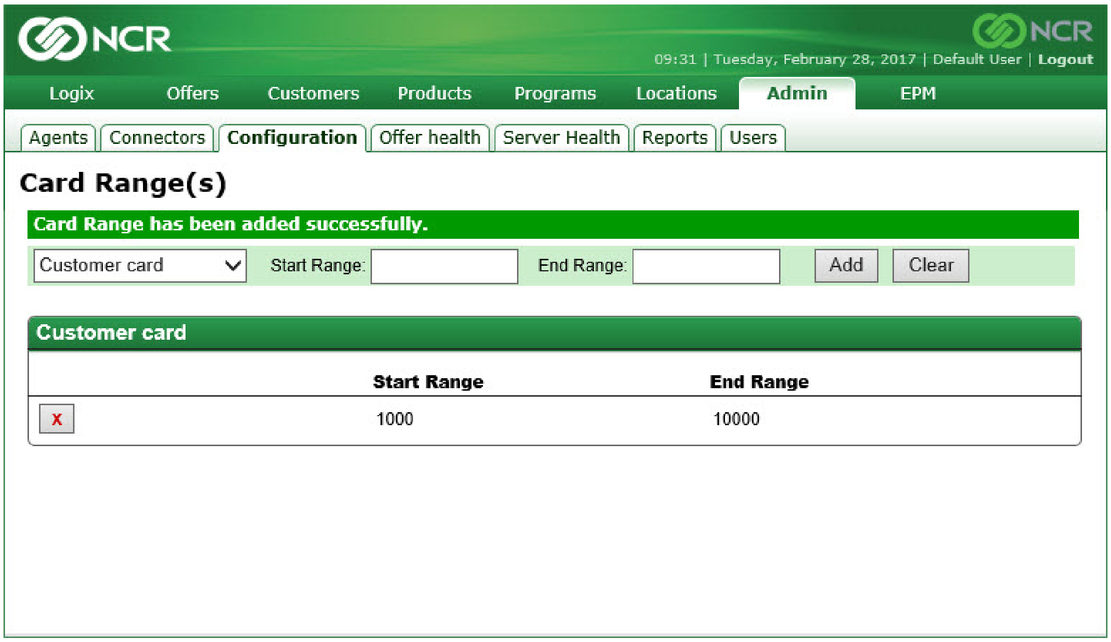


7. Select a card type from the drop–down list.

8. Enter the **Start Range** and the **End Range**, and then select **Add**.

Note: The Start Range value must be lesser than the End Range Range value. Both values must have only numeric characters. Select **Clear** to clear the fields.

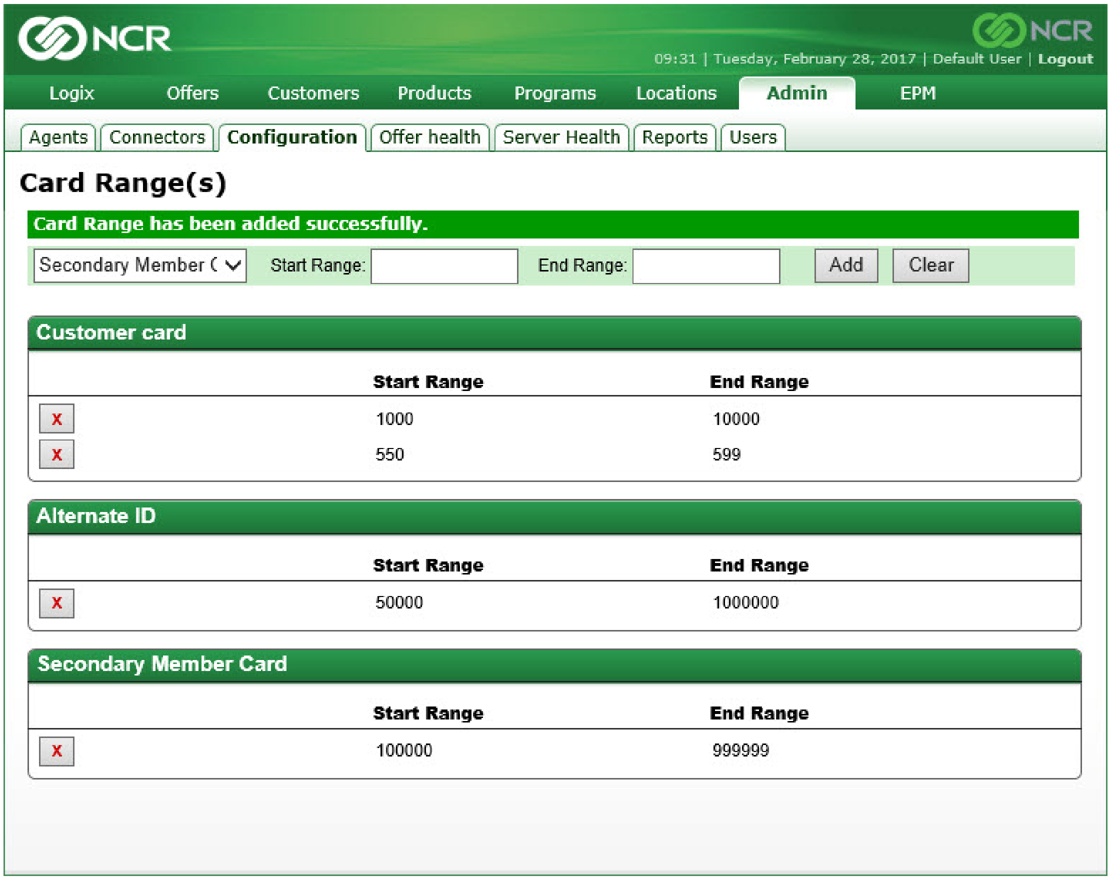
The system displays the newly–added card range.



Example: The automatic creation of customer records in transactions is enabled, and the *Customer card* card type is enabled for this feature in the database. The retailer has set the card range from 1000—10000. A new customer presents his Customer card, which has the 9987 card number, to the cashier during his first transaction in the store. The customer's record is automatically created in the system, and the customer is able to avail of the existing and applicable offers and programs starting in that first transaction.

Another new customer, whose Customer card number is 10026, presents his Customer card in a transaction. Because the card number exceeds the acceptable range, the customer record is not created, and the customer is able to avail of only the All Customer offers.

Retailers can add more than one card range for a card type, as shown in this image.



Note: The system validates the range of a numeric type customer identifier only if a card range of the card type is added in this page. Additionally, if the *Enable range for numeric type customer identifiers* setting is set to *Yes*, but the retailer did not add a card range for any card type, the customer ID is not validated for the range during customer ID validation.

Customer Records

If a customer ID passes all the required validations, the customer record is created in the system with the following details:

- A unique and valid customer ID
- A valid card type, which can be one of the following:
  - Customer Card
  - HouseHold Card
  - Alternate ID
  - Username
  - Associate ID
  - Email Address
  - Second Member Card
  - Account Number
  - Barcode
- Active status

The customer is able to avail of the following existing and applicable offers and programs:

- New Cardholder offers
- Any Customer offers
- Any Cardholder offers
- Offers that are assigned to a specific group (only if the new customer is part of that group)
- Points and Stored Value programs

If the customer ID is searched in Logix, the newly created customer record is displayed. For information on performing customer inquiries in Logix, refer to *Performing Customer Inquiries* on page 367.

Chapter 6: Defining Product Configuration

Overview

The Products tab displays a set of pages and tools that are used to create and manage product records. This chapter describes how to do the following tasks:

- Manage product groups
- Use product hierarchies
- Use the Product Inquiry page
- Use the Product Group Inquiry page

Product Records

Logix identifies products through Product IDs, which are alpha–numeric codes that represent products. Using alpha–numeric identifiers facilitates a more flexible approach to product identification.

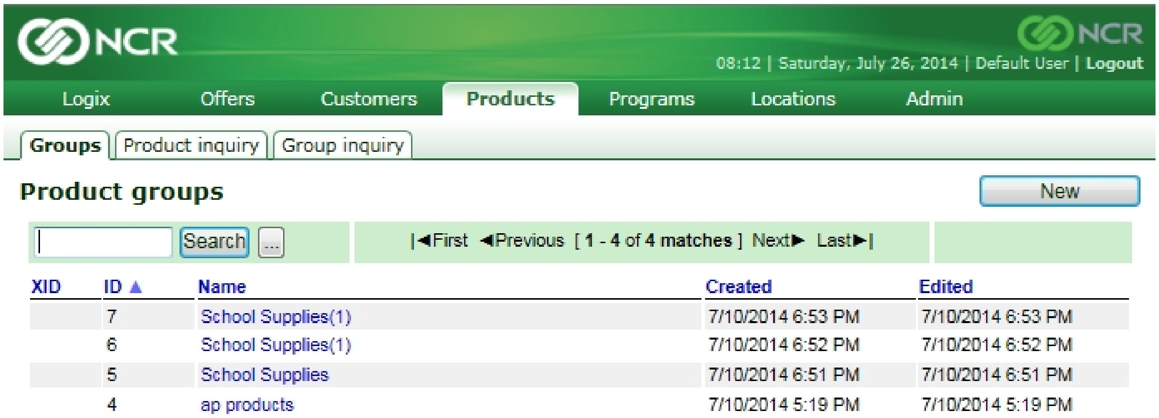
Note: To specify numeric–only codes for product identification, refer to *Product Options* on page 722.

Logix uses any of the following types of Product IDs:

Product ID Type	Description
Universal Product Code (UPC)	Represents individual products. **Note:** Logix zero–pads UPCs to a configurable number of digits.
Department ID	Represents all products in a given retail department. **Note:** These are 4–digit codes padded to a configurable number of digits.
Manufacturer Family Codes	Identifies groups of products related by manufacturer or product class.
Mix/Match Codes	Indicates POS fields in a PLU file that describe how to group items together. **Example:** 3/$1.00–type pricing.
Pool Codes	Indicates customer–specific codes used to define an ad hoc group of products within a POS.

Accessing Product Records

To access product records, select the **Products** main tab. The Product Groups page is displayed by default.



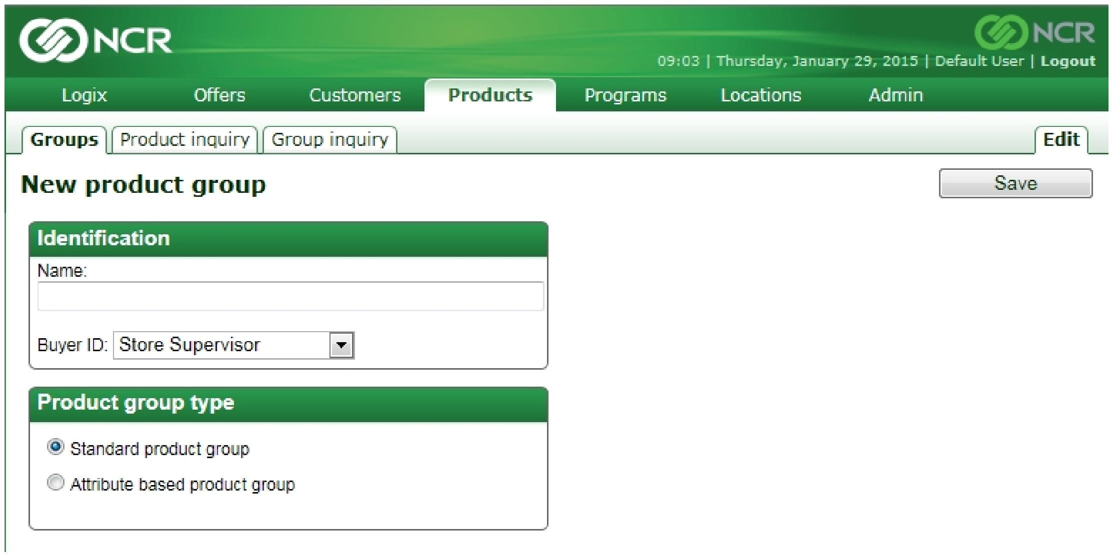
Select any of the following Product page tabs to access product records:

Page Tab	Description
Groups Page	Displays a list of product groups. It displays details of product groups such as product IDs, names, and dates and times. Product groups exist independently of any offer. They can also be used simultaneously in multiple offers or can persist without being used in any offer. For more information, refer to *Creating Standard Product Groups* on the next page.
Product Inquiry Page	Displays a list of product groups to which a product is associated with. It also displays a list of offers using the searched product. For more information, refer to *Using the Product Inquiry Page* on page 482.
Group Inquiry Page	Displays details of all the UPCs in a specified group instead of a single UPC. It shows the groups in which the UPCs are a part of, the offers that use those groups, and the discounts awarded by the offers. For more information, refer to *Using the Product Group Inquiry Page* on page 483.

Creating Standard Product Groups

To create a standard product group, follow these steps:

1. From the Product Groups page, select **New**. The application displays the New Product Group page.



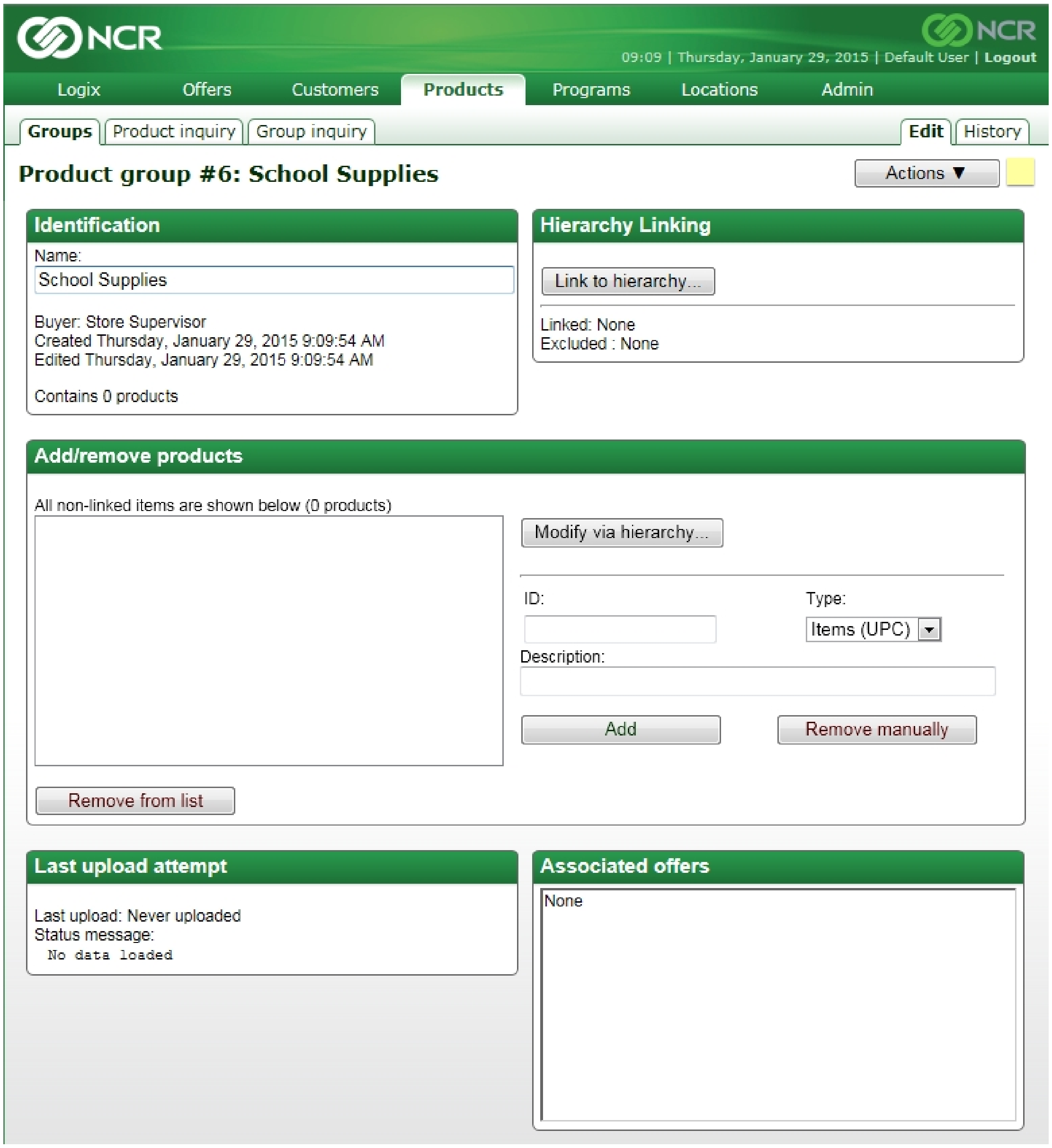
2. Enter the group name.

Note: Select a buyer from the Buyer ID drop–down list to associate the product group with a buyer within certain departments. For more information, refer to *Buyers* on page 621.

3. From the Product group type section, select **Standard product group**.

Note: A Standard Product Group cannot be changed to an Attribute-Based Product Group or vice versa.

4. Select **Save**. The Product Group Edit sub–page is displayed, as shown in the following example:



5. Use the following table to set parameters in specific sections:

In the section	Do the following:
Identification	When necessary, edit the group name. **Note:** The total count of all products in the group indicates the sum of the linked items and the manually added or uploaded items in the group.

In the section	Do the following:
Hierarchy Linking	To associate the product group with a product hierarchy, select the **Link to hierarchy** button. For more information, refer to *Product Hierarchies* on page 469.
Add/Remove Products	• Add items to the product group. To use this feature, refer to any of the following sections in this chapter: • Adding Items Using Product IDs • Adding Items by Uploading Item Files • Adding Items from Product Hierarchies for Standard Product Groups • Remove items from the product group. To use this feature, refer to any of the following sections in this chapter: • Removing Items from List • Removing Items from Product Hierarchies
Last Upload Attempt	This section only displays information on the last time a product group was imported into Logix. To upload a product group file, contact an NCR Professional Services Consultant.
Associated Offers	Associate product group with offers. For more information, refer to *Offer Conditions* on page 193.

6. From the Actions menu, do any of the following:

   - Select **Save** to save a new group configuration or save the changes made to an existing group configuration.
   - Select **Delete** to remove a product group.

Note: Product groups associated with offers cannot be deleted.

   - Select **Upload** to upload a product group configuration file in plain text.
   - Select **Download** to download a product group configuration file in plain text.
   - Select **Copy group** to create a new product group based on an existing product group.
   - Select **New** to create a customer group.
   - Select **Redeploy** to apply changes to the deployed associated offer.

Note: A product group is marked as deployed when an offer using it is deployed. For more information, refer to *Deploying Offers* on page 177.

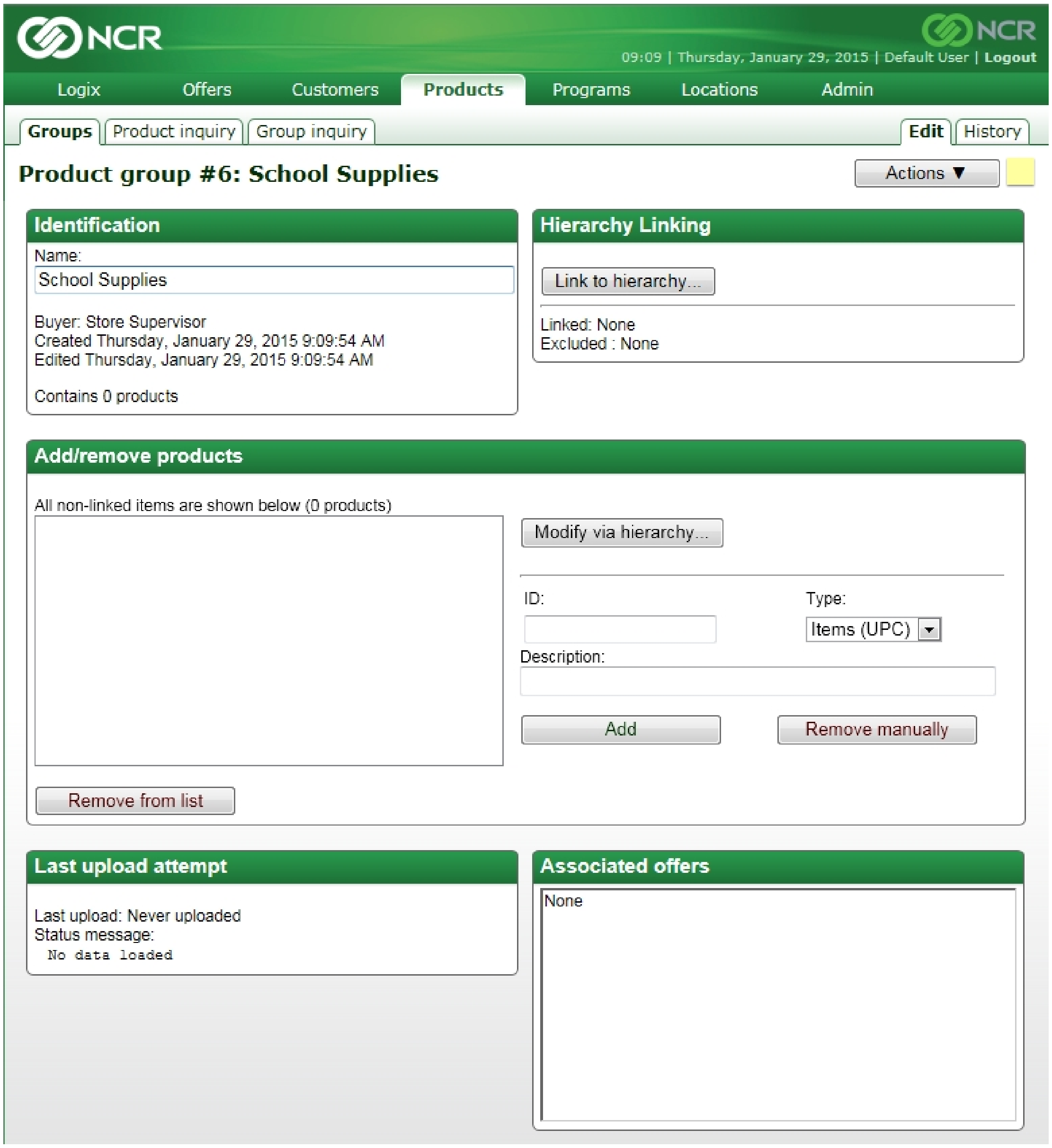
   - Select **Modify group** to add or remove products from the group.

Adding Items Using Product IDs

To add items to a product group, use any of the methods discussed in this section.

Method 1

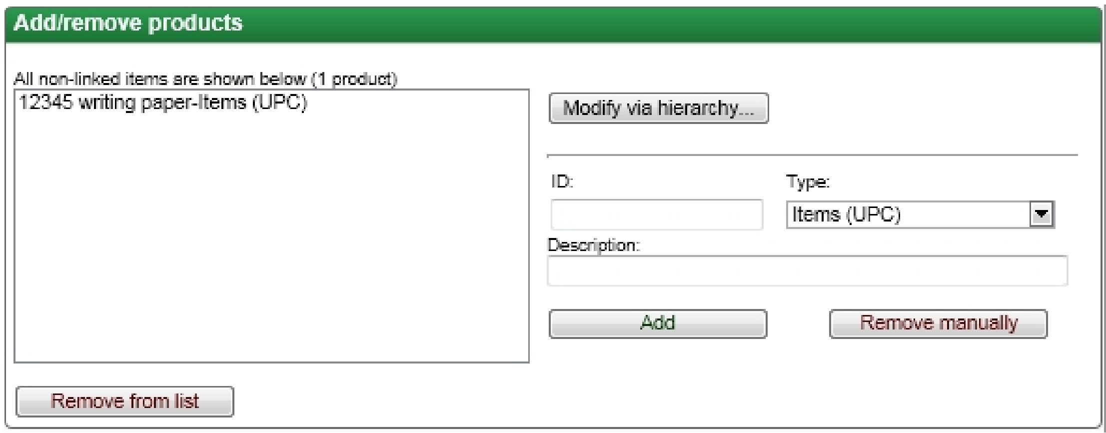
1. From the Product Groups page, select a product group name. The corresponding product group configuration sub–page is displayed.



2. In the Add/remove products section, do the following:
   - Enter the product ID in the text box.
   - Select the Product ID type from the Type drop–down list.
   - Enter the product description in the Description text box.

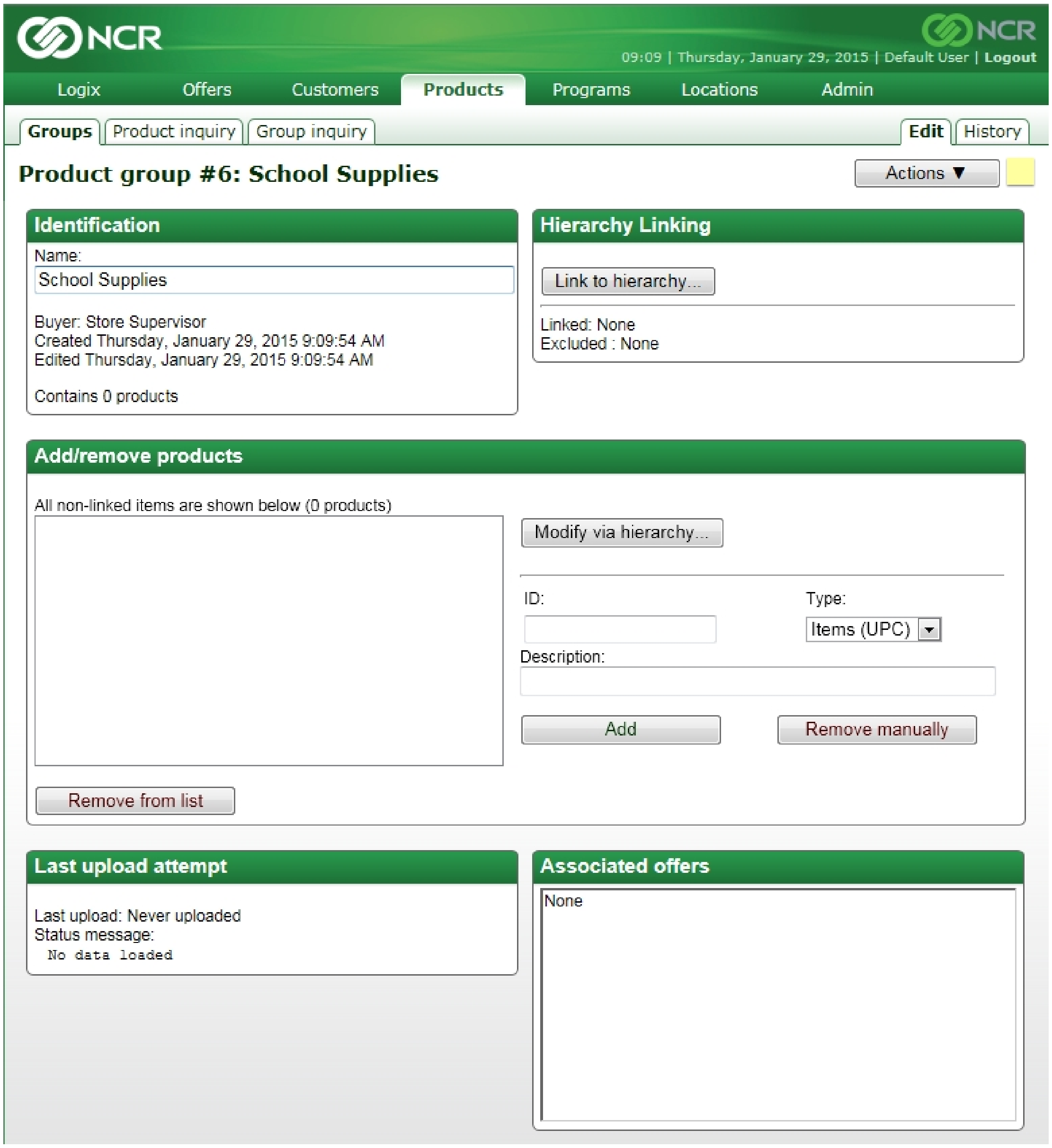
Note: Products can also be added or removed using the **Modify group** option from the Actions menu.

3. Select **Add**. The item details are displayed in the Product ID text box.

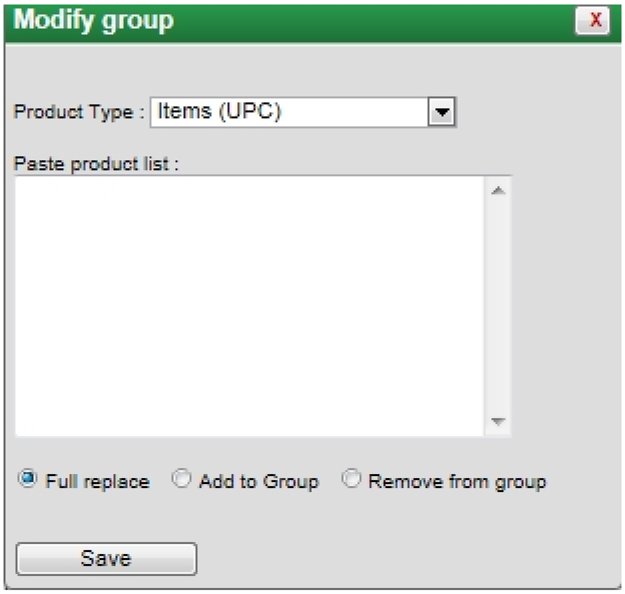


Method 2

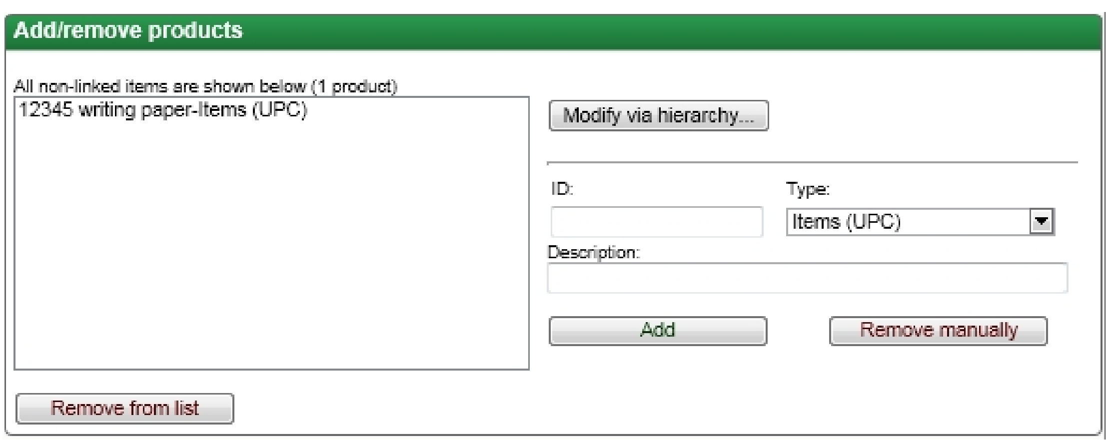
1. From the Product Groups page, select a product group name. The corresponding product group configuration sub–page is displayed.



2. From the Actions menu select **Modify group**. The Modify group pop–up window is displayed.



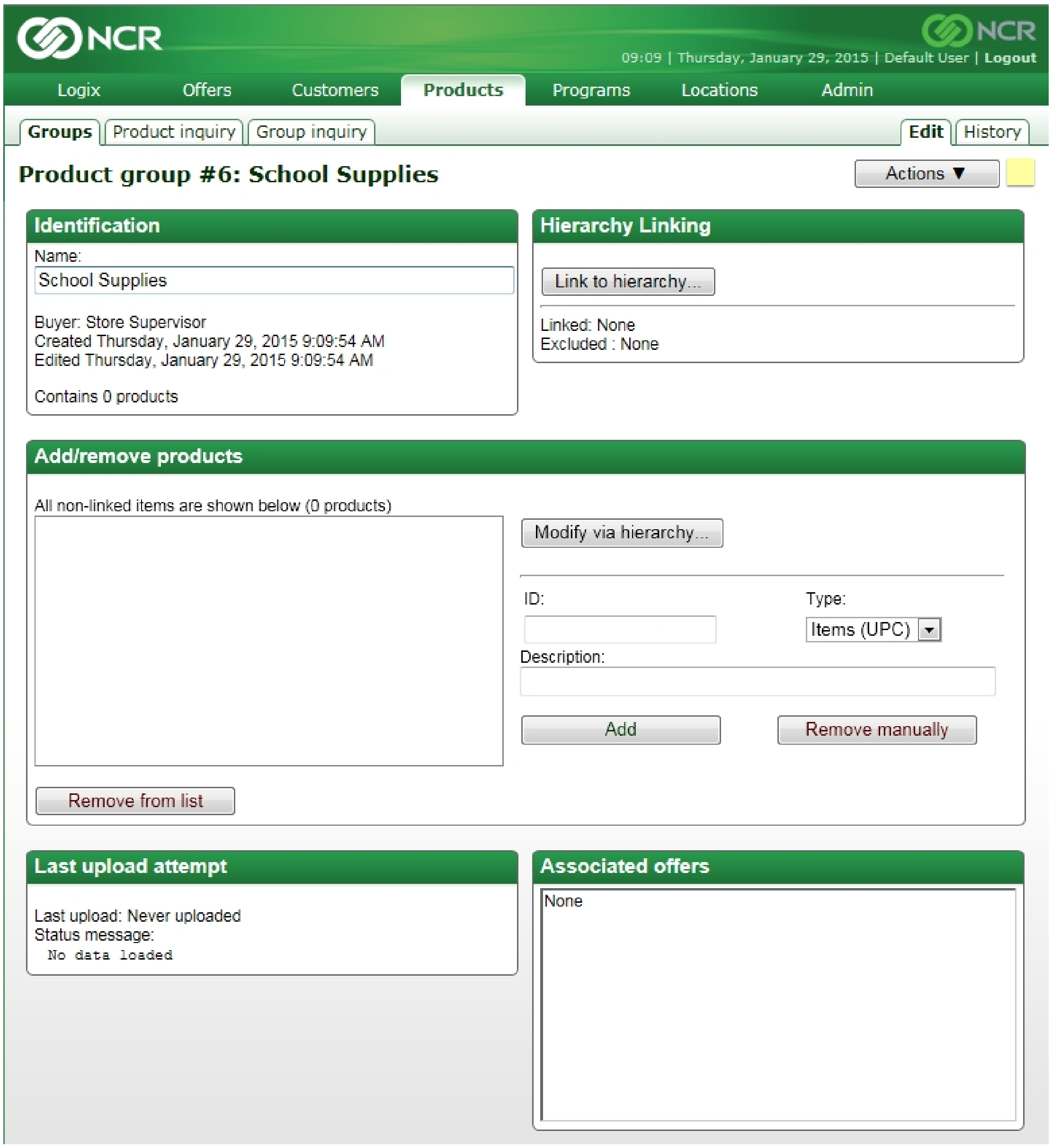
3. Select a product type from the Product Type drop–down list. For more information, refer to *Product Records* on page 416.
4. Enter product data based on the selected product type.
5. Select either of the following:
   - **Full replace**—overwrites the existing products.
   - **Add to Group**—adds the product list to the existing products in the group.
6. Select **Save**. A pop–up window is displayed.
7. Select **OK**. The item details are displayed in the Product ID text box.



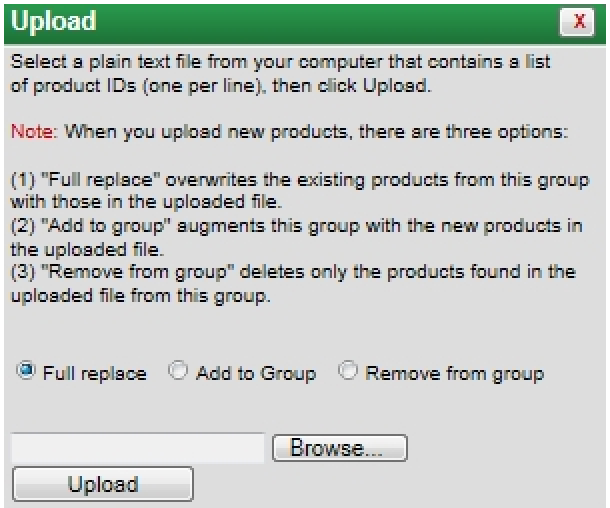
Adding Items by Uploading Item Files

To upload a list of product IDs, follow these steps:

1. From the Product Groups page, select a product group. The corresponding product group configuration sub–page is displayed.



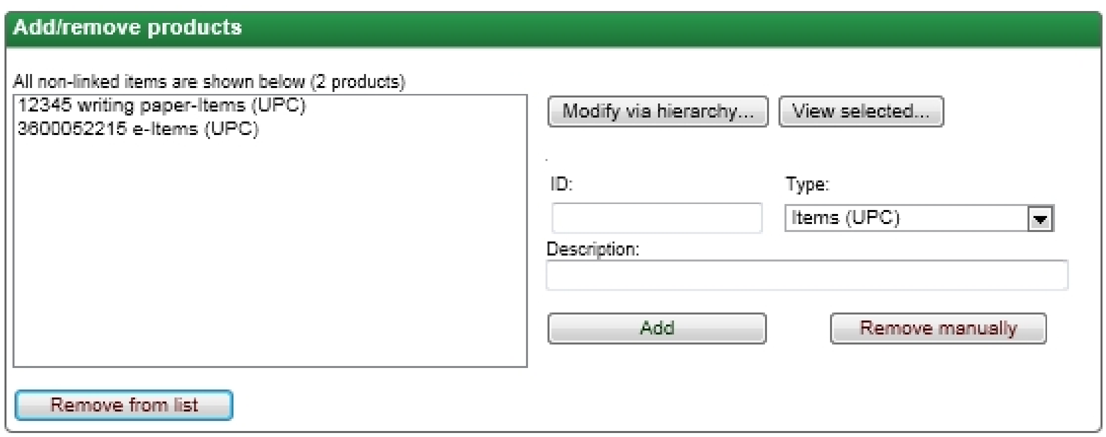
2. From the Actions menu, select **Upload**. The application displays the Upload pop–up window.



3. Select an upload method.
4. Select **Browse** and then, select a plain text file.

Note: The file must contain a list of product IDs. One product ID on each line.

5. Select **Upload**. The application displays the product IDs in the Product ID text box.

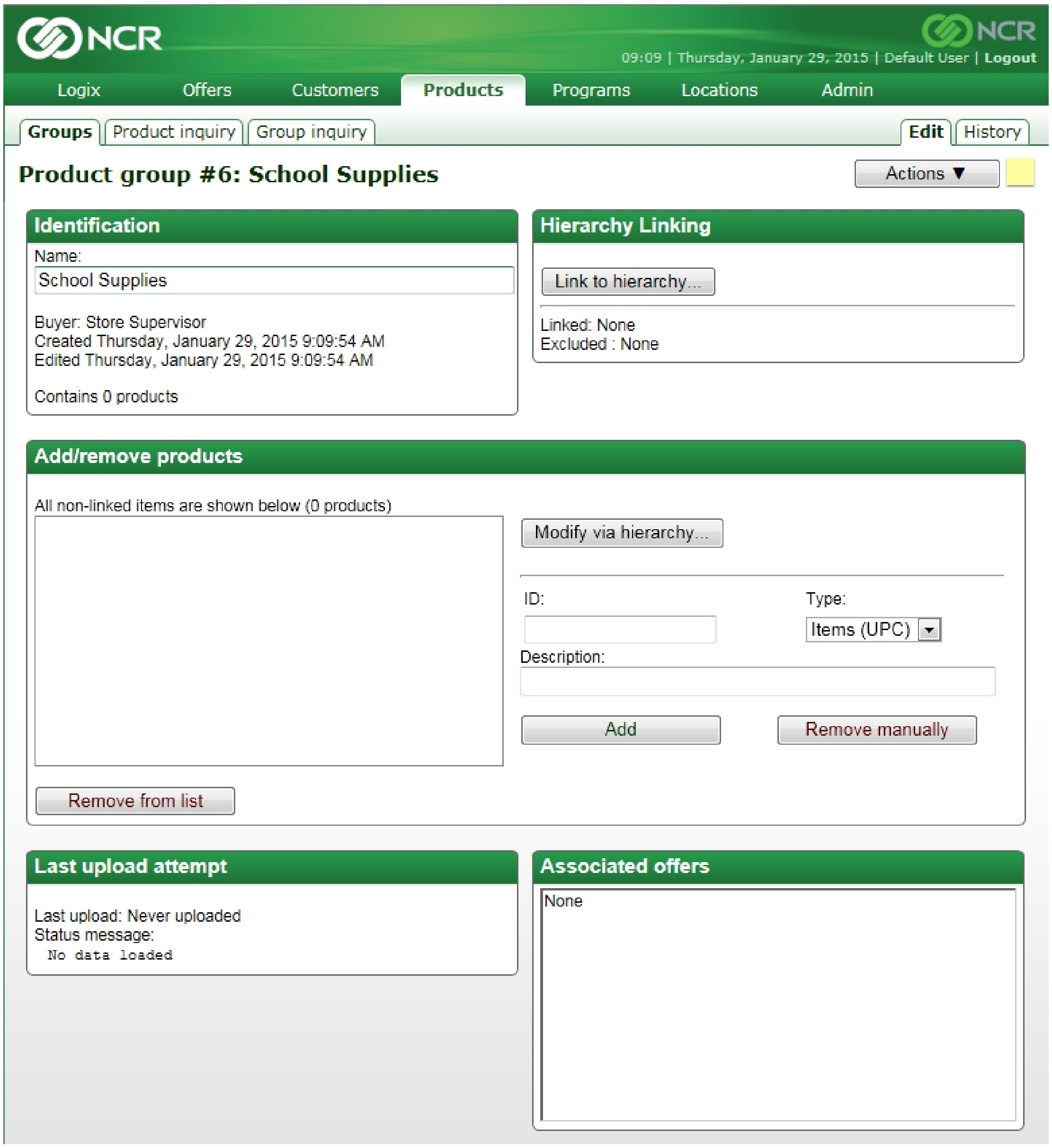


Adding Items from Product Hierarchies for Standard Product Groups

To add items from the product hierarchies, follow these steps:

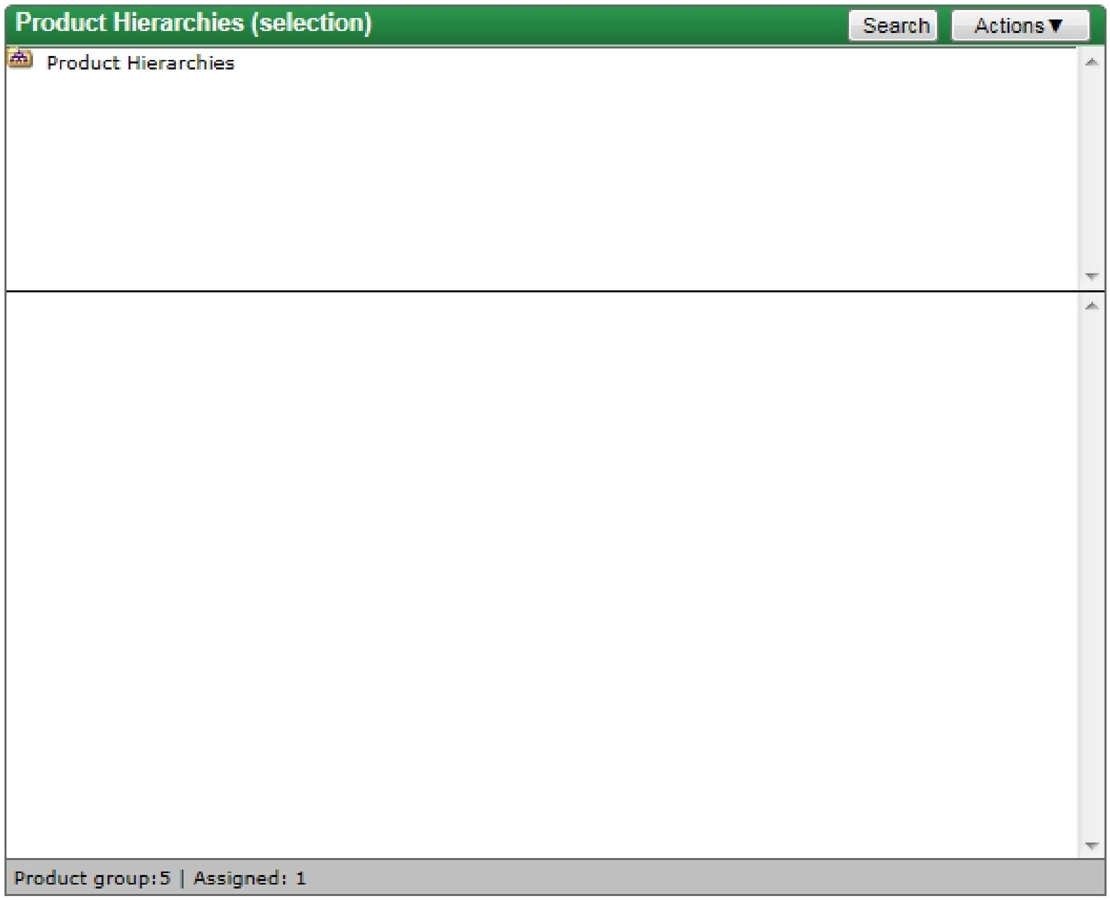
Note: This section assumes that the system contains product hierarchy files. To enable product hierarchies in the system, contact an NCR Professional Services Consultant.

1. From the Product Groups page, select a product group. The corresponding product group configuration sub–page is displayed.

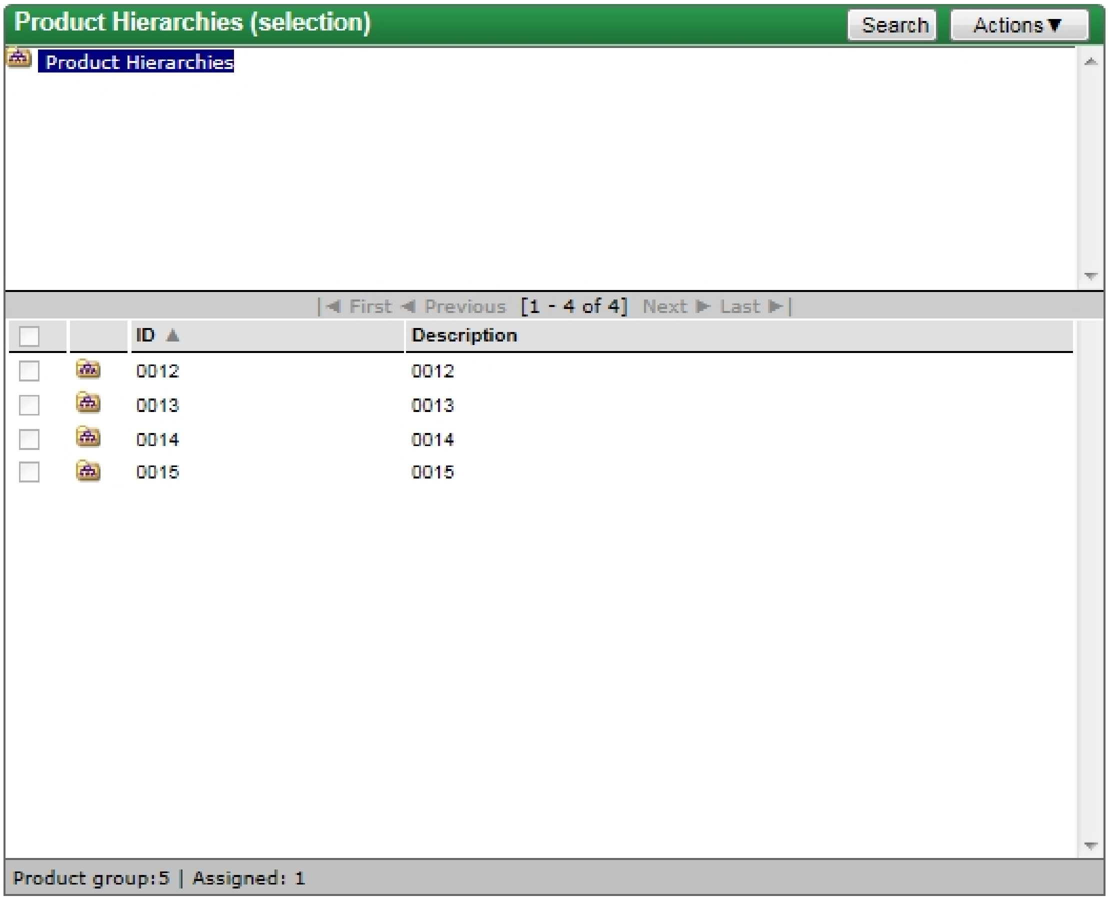


Note: Use the **Link to hierarchy . . .** button to link with an entire hierarchy. For more information, refer to *Associating Product Groups with Hierarchies* on page 470.

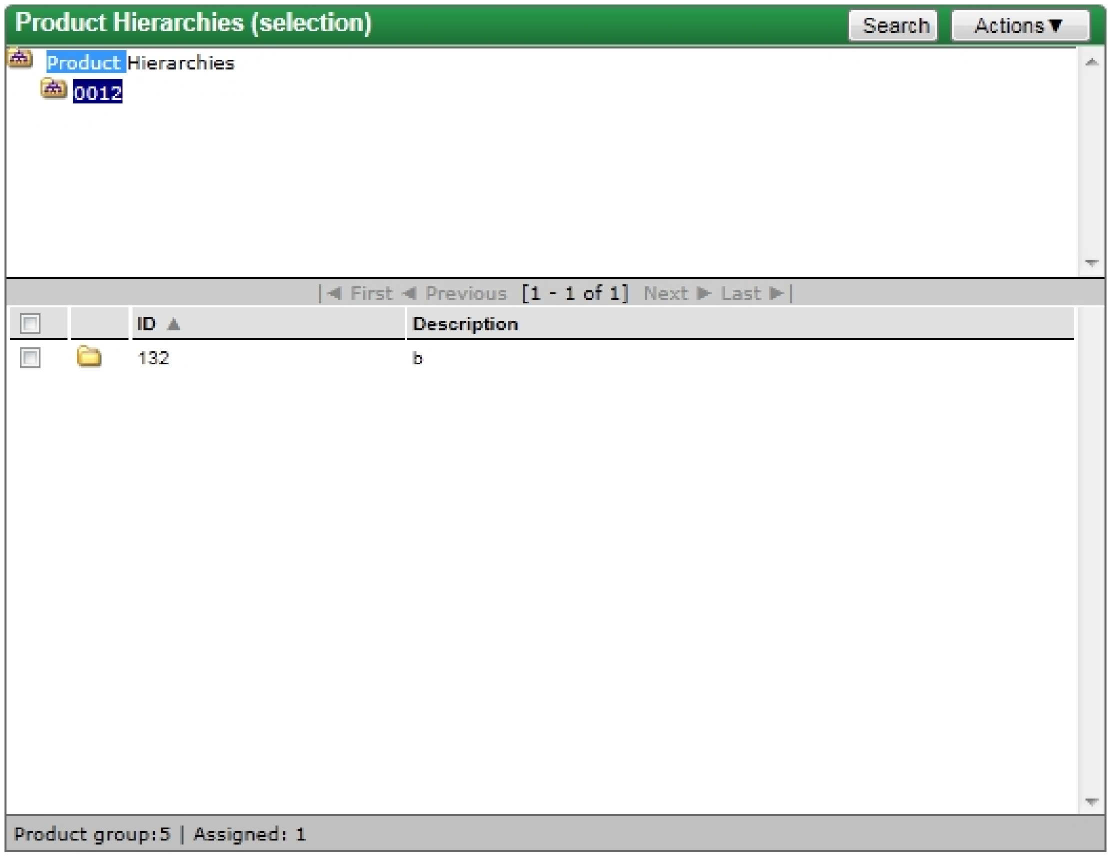
2. In the Add/remove products section, select the **Modify via hierarchy . . .** button. The Hierarchy window is displayed.



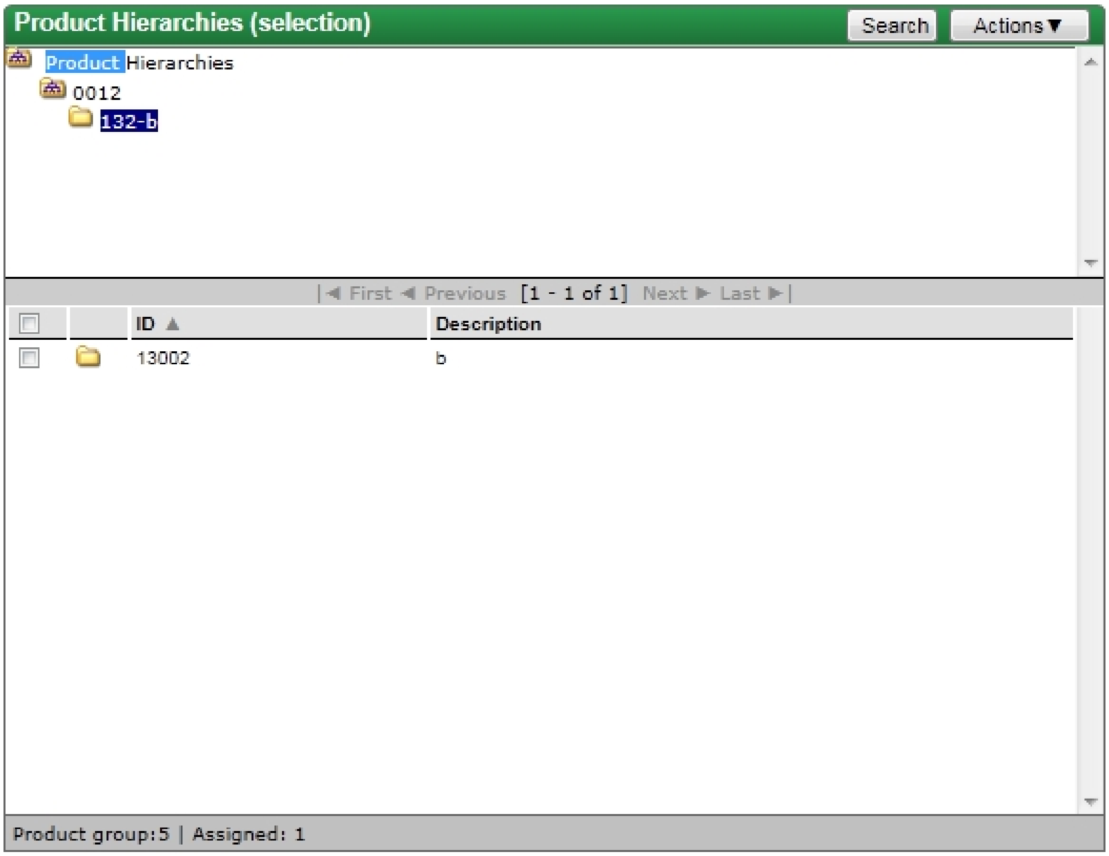
3. Select the **Product Hierarchies** node to display product hierarchies.



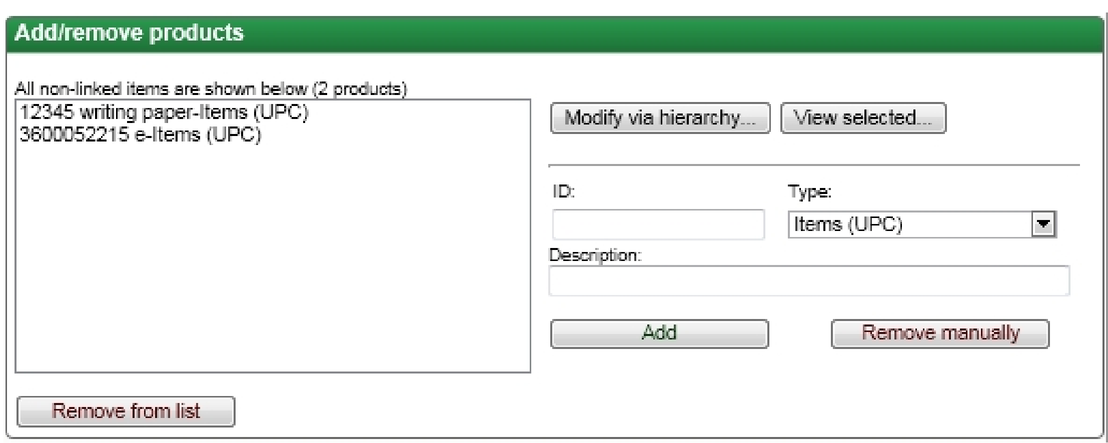
4. Double–click a product hierarchy. The application displays the selected folder under the Product Hierarchies node and the corresponding child node folder in the Folders pane.



5. Double–click the check box of a child node folder. The application displays the product group folder under the product hierarchy; and the corresponding items folder in the Folders pane.



6. Select the items folder check box.
7. From the Actions menu, select **Add to group**. A confirmation window is displayed.
8. Select **OK**. The application displays the items in the Add/remove products section on the Product Group Configuration sub–page.



Removing Items from Standard Product Groups

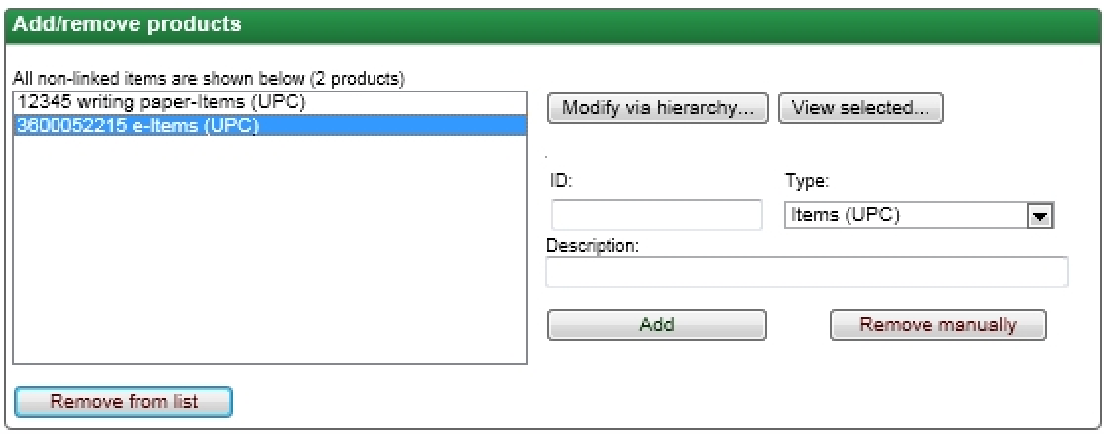
This section describes the following methods of removing items from a standard product group:

- Removing Items from List. For more information, refer to *Removing Items from List* below.
- Removing Items from Product Hierarchies. For more information, refer to *Removing Items from Product Hierarchies* on the facing page.

Removing Items from List

To manually remove items from a product, follow these steps:

1. From the Product Groups page, select a product group. The corresponding product group configuration sub–page is displayed.
2. In the Add/remove products section, select an item entry in the product text box.

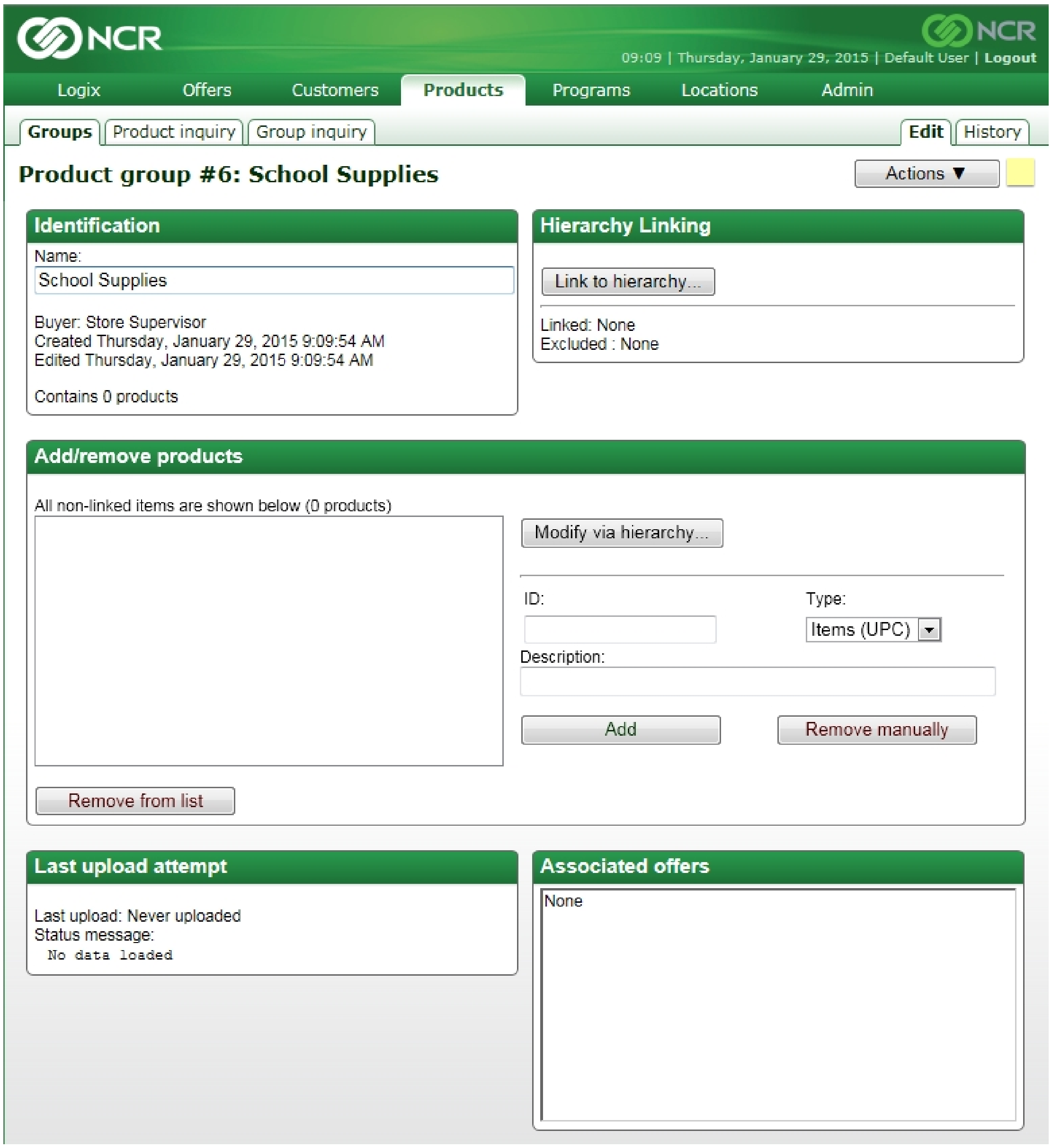


3. Select **Remove from list**. A confirmation window is displayed.
4. Select **OK**.

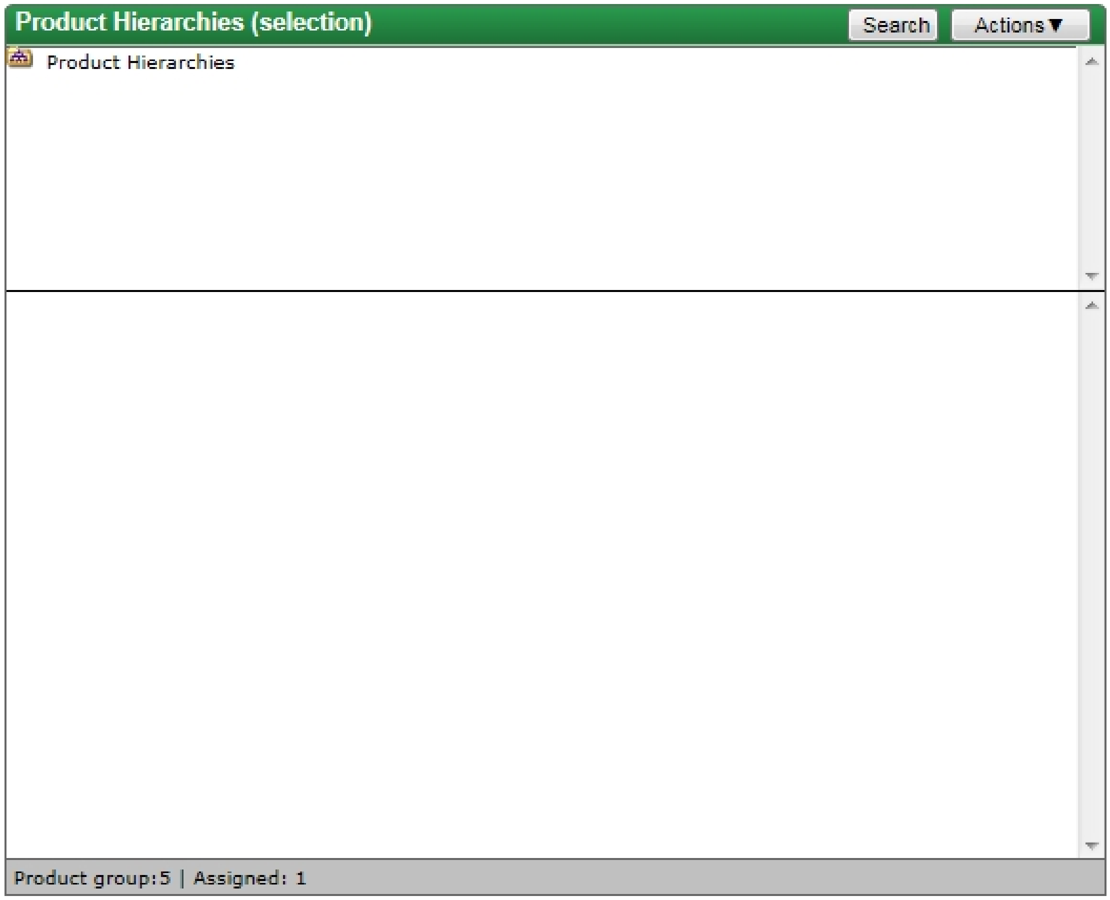
Removing Items from Product Hierarchies

To remove items from product hierarchies, follow these steps:

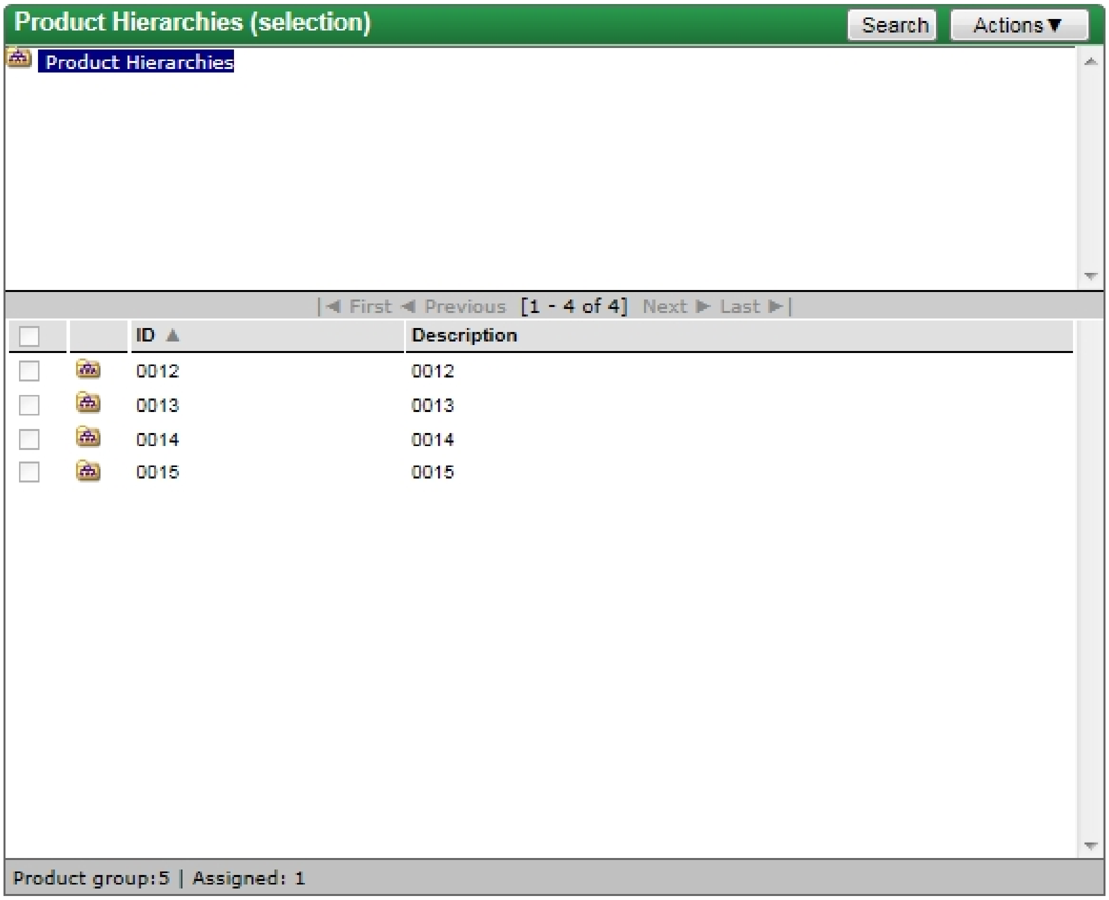
1. From the Product Groups page, select a product group. The corresponding product group configuration sub–page is displayed.



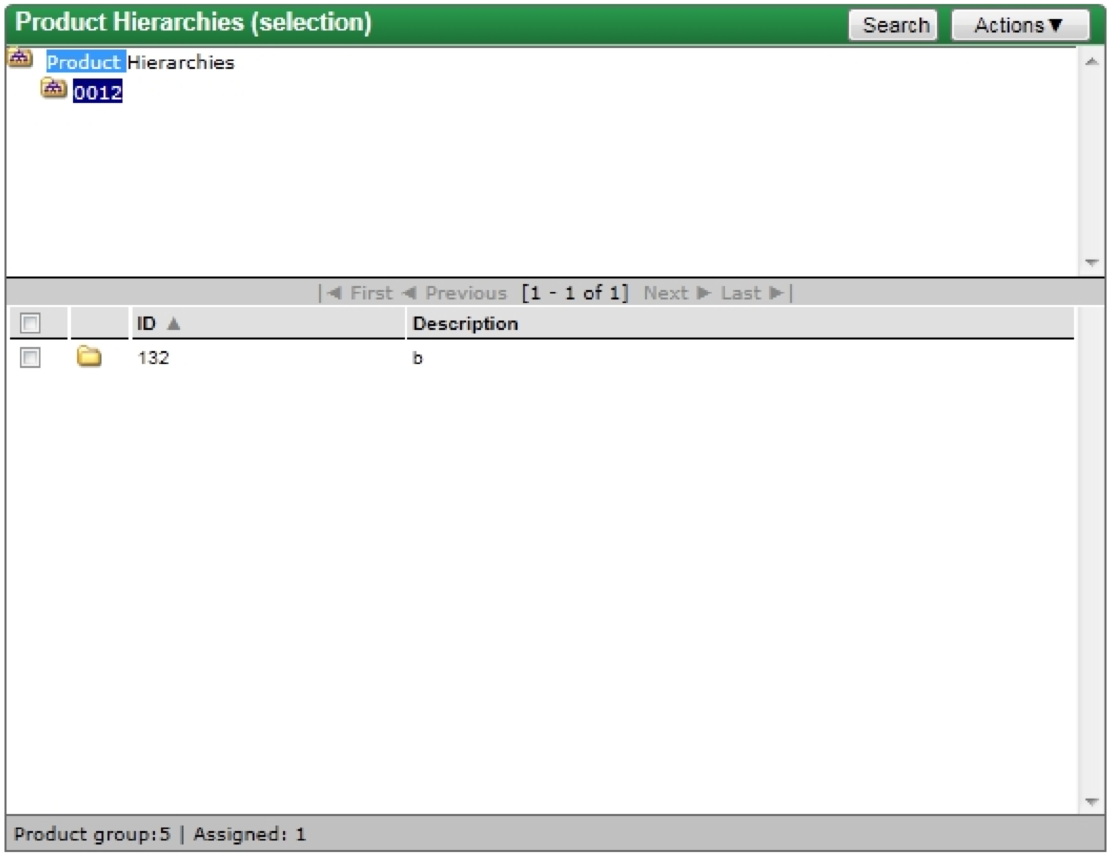
2. In the Add/remove products section, select the **Modify via hierarchy . . .** button. The Hierarchy window is displayed.



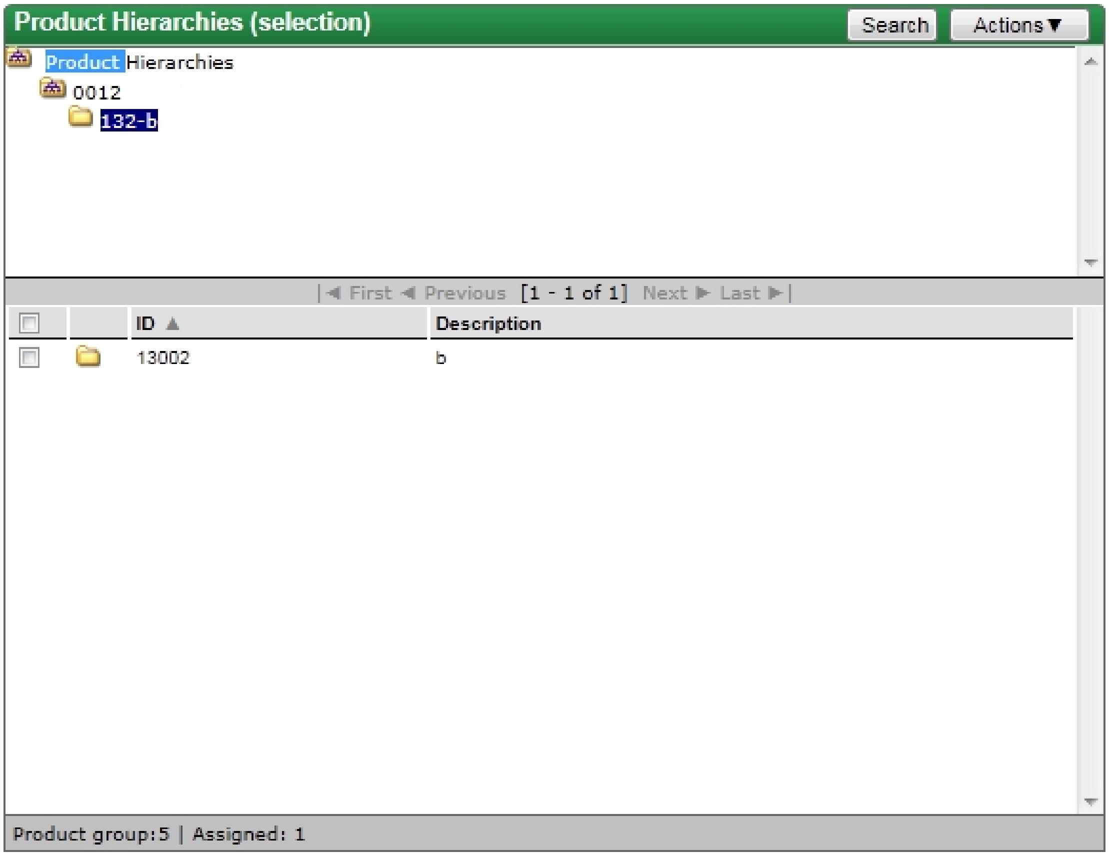
3. Select the **Product Hierarchies** node to display product hierarchy.



4. Double–click a product hierarchy. The application displays the selected folder under the Product Hierarchies node; and the corresponding child folder in the Folders pane.



5. Double–click a product group check box. The application displays the product group folder under the product hierarchy; and the corresponding items folder in the Folders pane.



6. Select the items folder check box.
7. From the Actions menu, select **Remove from group**. A confirmation window is displayed.

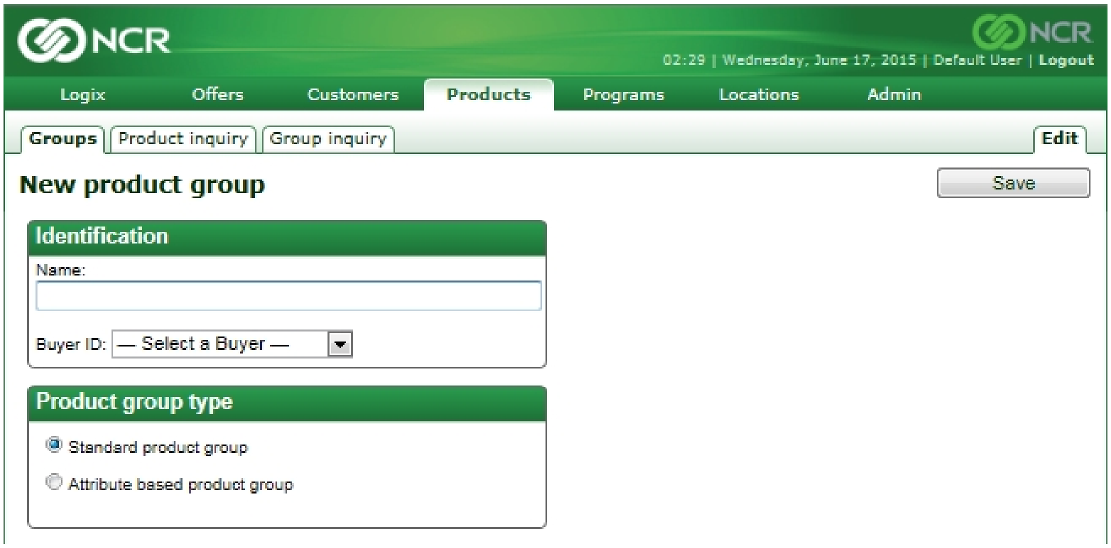
Note: Only items that were included in the group can be removed.

8. Select **OK**.

Creating Attribute–Based Product Groups

To create a product group, follow these steps:

1. From the Product Groups page, select **New**. The application displays the New Product Group page.



Note: Attribute–based product groups can be created only when attributes are enabled in the system. To enable attributes, enable the UE_SystemOptions 157 "Enable Attribute based product group" in the LogixRT database. To modify this option, contact an NCR Professional Services Representative.

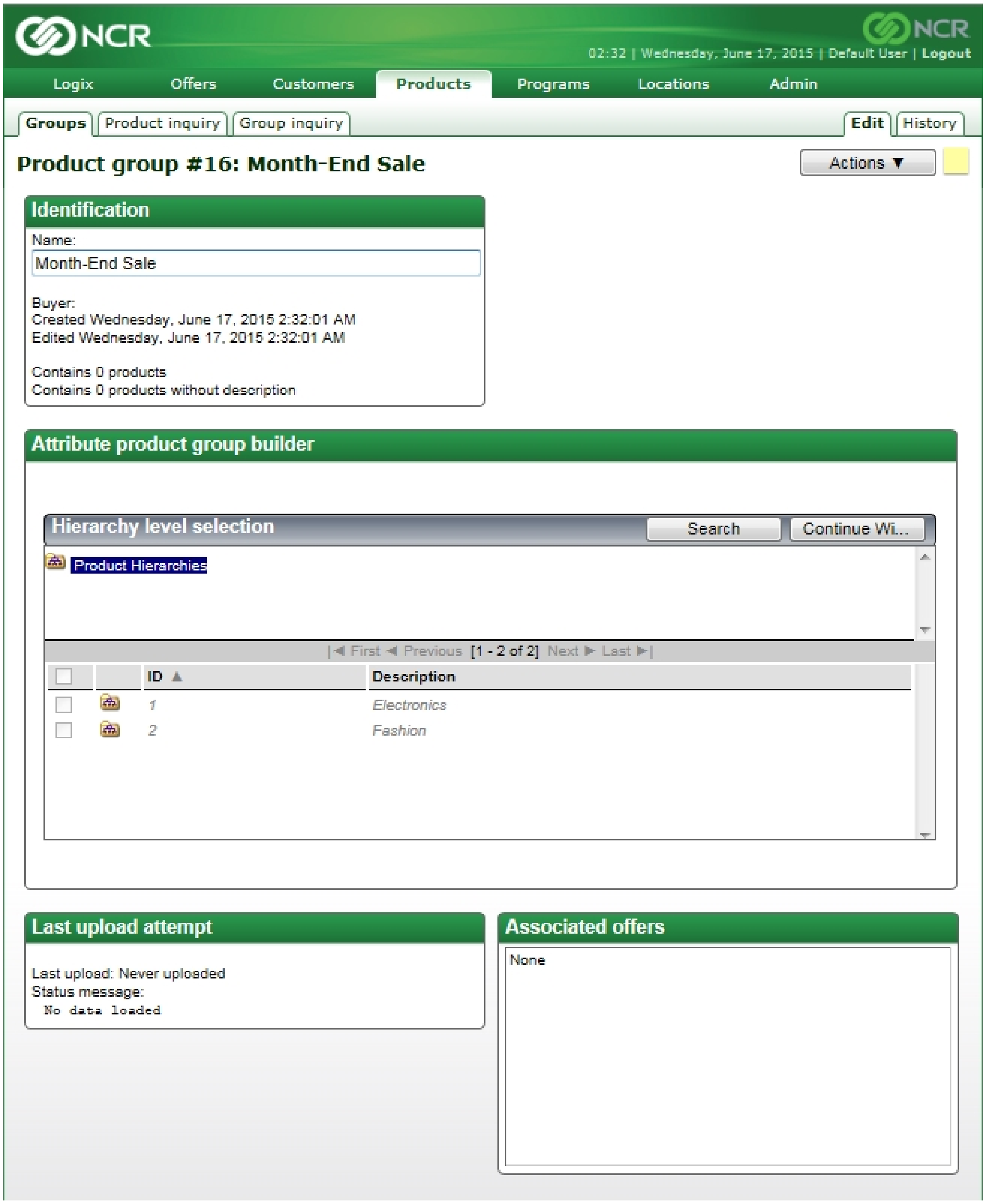
2. Enter the group name.

Note: Do not select a buyer because the department hierarchy nodes and all their corresponding child nodes may be inaccessible. For more information, refer to *Buyers* on page 621.

3. From the Product group type section, select **Attribute based product group**.

Note: An Attribute-Based Product Group cannot be changed to a Standard Product Group or vice versa. To set a default product group type, refer to *Product Options* on page 722.

4. Select **Save**. The Product Group Edit sub–page is displayed, as shown in the following example:



Note: Attribute–based product groups are automatically updated when the products under the selected hierarchy node are changed due to hierarchy updates or changes in the attribute–value pairs assigned to products.

5. Use the following table to set parameters in specific sections:

In the section	Do the following:
Identification	When necessary, edit the group name. **Note:** The total count of all products in the group indicates the sum of the linked items and the manually added or uploaded items in the group.
Attribute product group builder	Select groups of products that belong to a set of Product hierarchy node and share certain attributes such as color, size, style, and so forth. For more information, refer to *Adding Items from Product Hierarchies for Attribute Product Groups* on page 442.
Last Upload Attempt	Displays only information about the last time a product group was imported into Logix. To upload a product group file, contact an NCR Professional Services Consultant.
Associated Offers	Dispalys product groups that are associated with offers. For more information, refer to *Offer Conditions* on page 193.

6. From the Actions menu, do any of the following:
   - Select **Save** to save a new group configuration or save the changes made to an existing group configuration.
   - Select **Delete** to remove a product group.
   - Select **Download** to download the product group content.
   - Select **Copy group** to create a new product group based on an existing product group.
   - Select **New** to create a product group.
   - Select **Redeploy** to apply changes to the deployed associated offer.

Note: A product group is marked as deployed when an offer using it is deployed. For more information, refer to *Deploying Offers* on page 177.

Importing Attribute–Based Product Groups

Importing attribute–based product groups is manually performed at the server. To import attribute–based product groups, follow these steps:

1. In the Logix server, go to the **`C:\Copient\AgentFiles\Import`**.
2. Import the following files in this order:
   a. `AddAttributeandValue.pua`
   b. `AddProductwithAttr.pua`
   c. `AddProducts.pha`

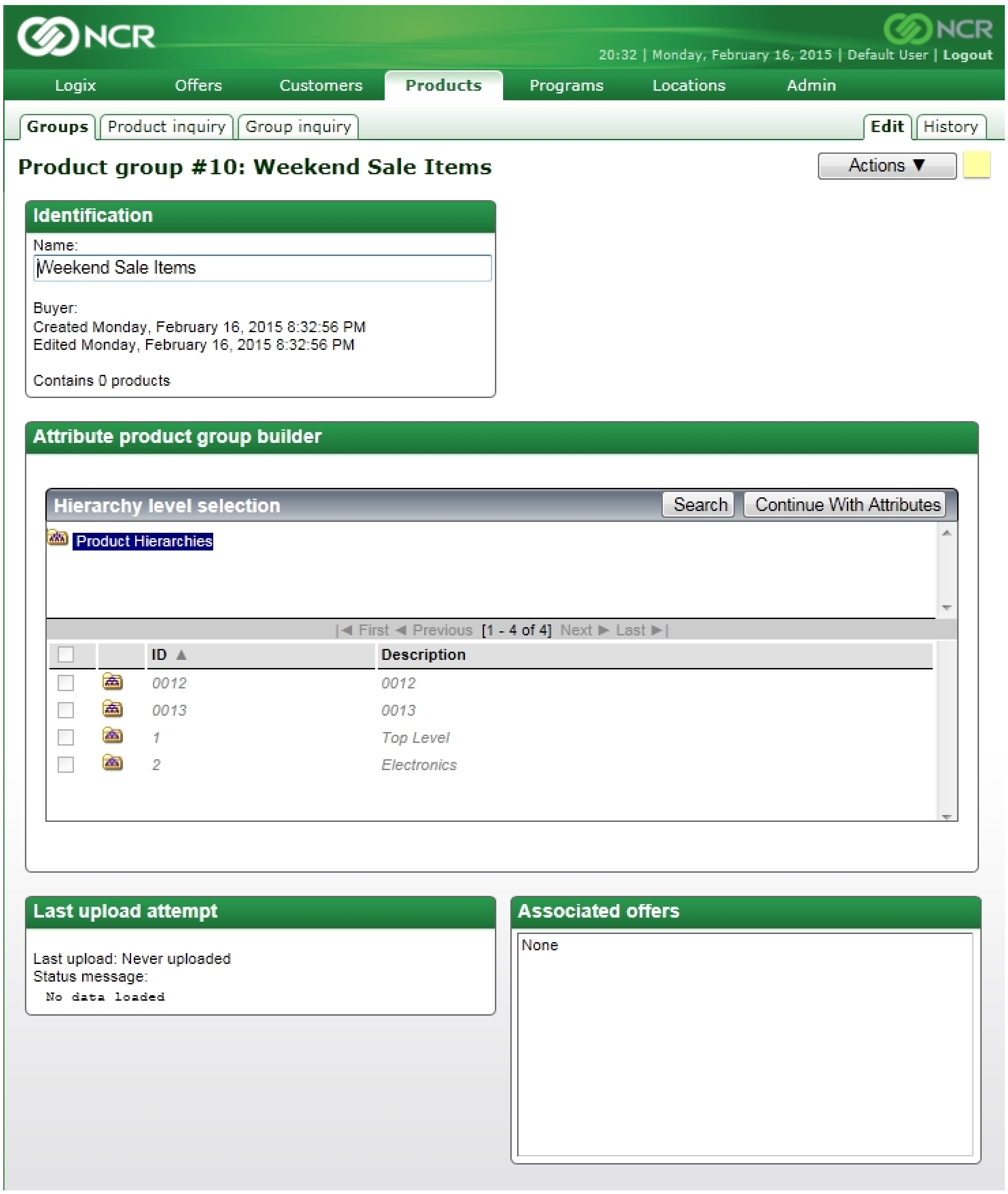
Note: Files a and c can be interchanged.

Adding Items from Product Hierarchies for Attribute Product Groups

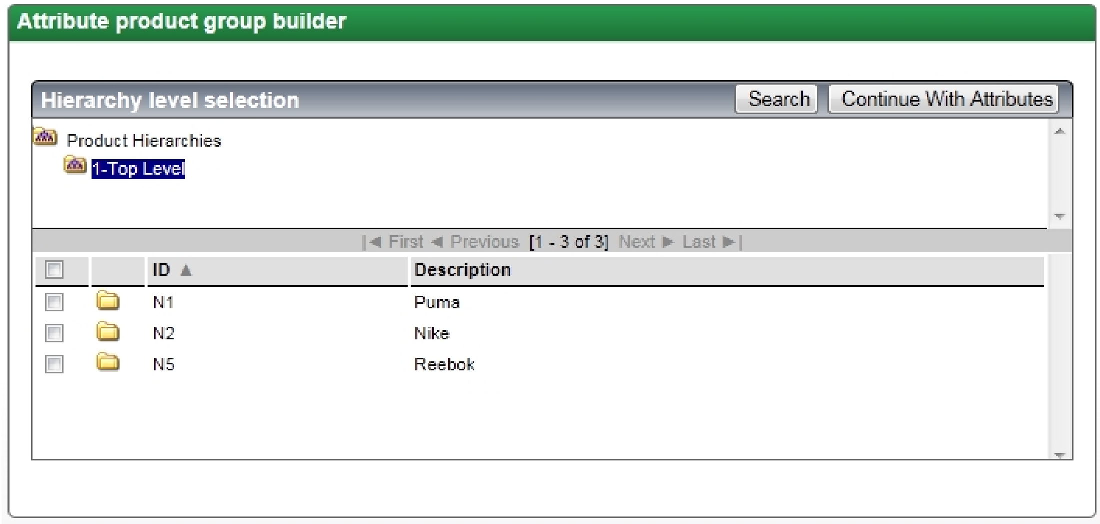
To add items from product hierarchies, follow these steps:

Note: This section assumes that the system contains product hierarchy files. To enable product hierarchies in the system, contact an NCR Professional Services Consultant.

1. From the Product Groups page, select an attribute–based product group. The corresponding product group configuration sub–page is displayed.

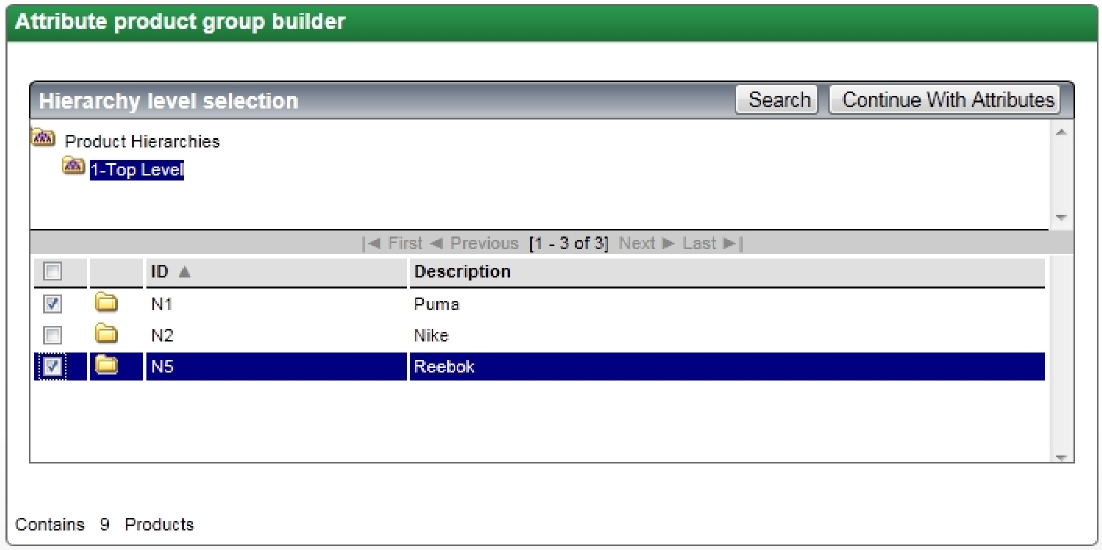


2. In the Hierarchy Level Selection of the Attribute Product Group Builder section, double–click a product hierarchy node. The application displays the selected folder under the Product Hierarchies node and the corresponding child folder in the Folders pane.

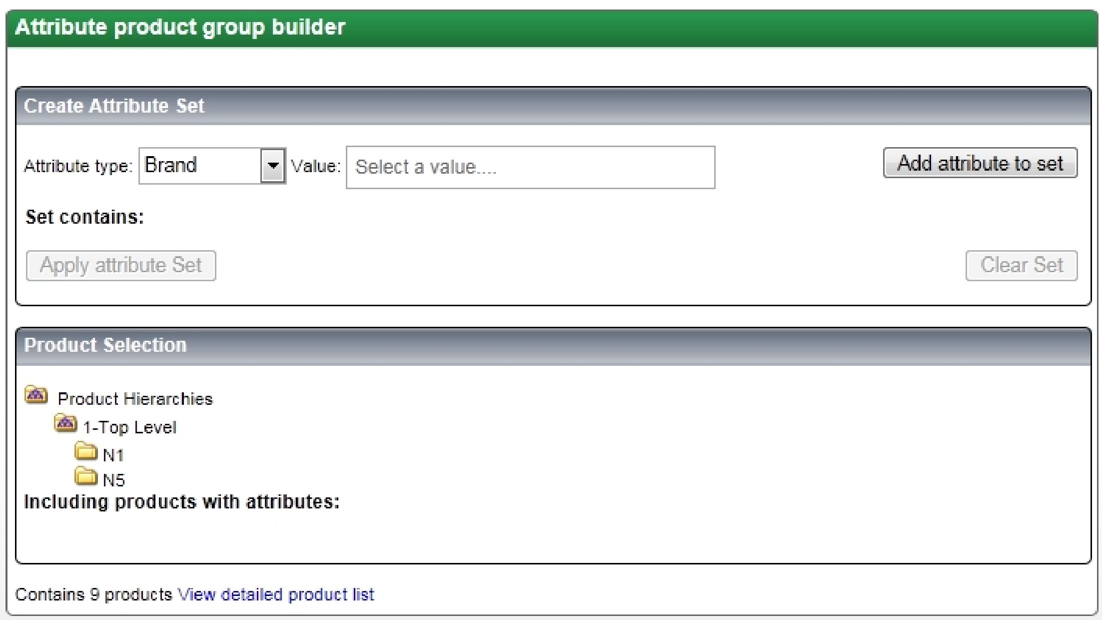


Note: Multiple nodes under a single parent can be selected.

3. Select a folder check box. The application displays the total number of products in the selected folders at the bottom–left side of the Attribute Product Group Builder.



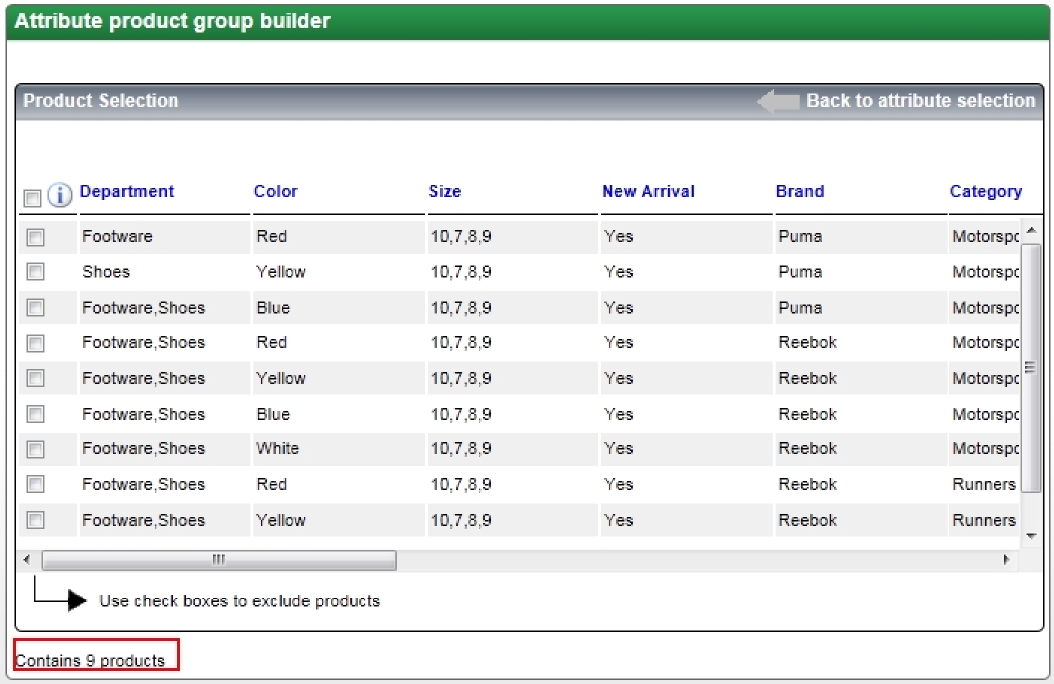
4. Select the **Continue With Attributes** button. The Attribute Product Group Builder displays the following details:



Note: The application displays a hyperlink to a detailed list of the products in the selected folders.

5. Do any of the following:

   - Select the **View detailed product list** hyperlink. The application displays the list of products in the selected hierarchies and attribute set.



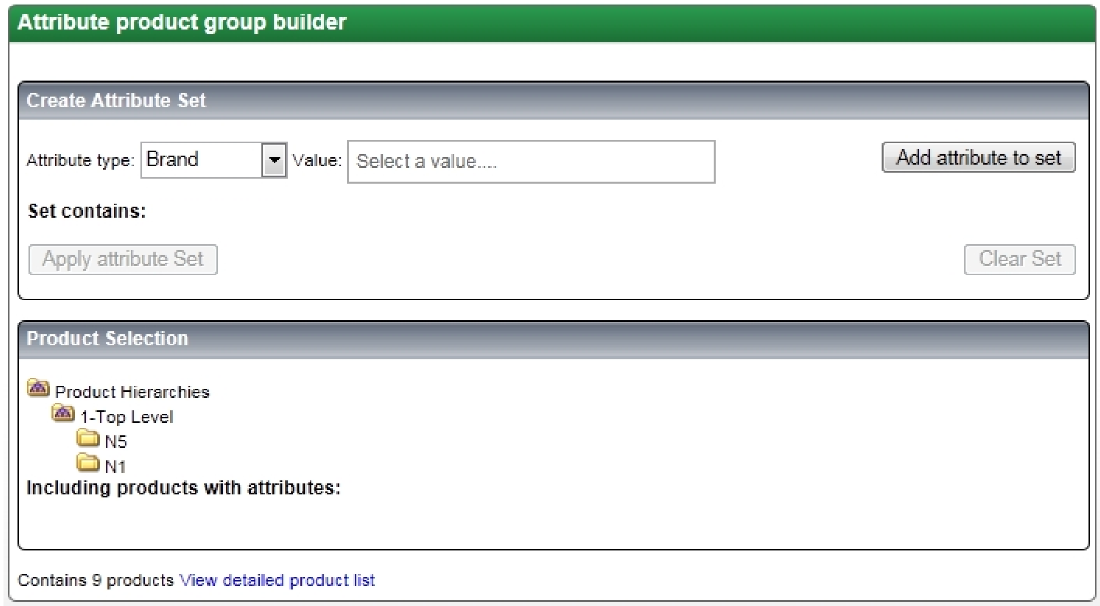
Note: The columns can be customized. For more information, refer to *Using the Attribute Product Group Builder Configuration Page* on page 632.

   - Create an attribute set. For more information, refer to *Creating Product Attribute Sets* on page 448.

Modifying Hierarchy Selections

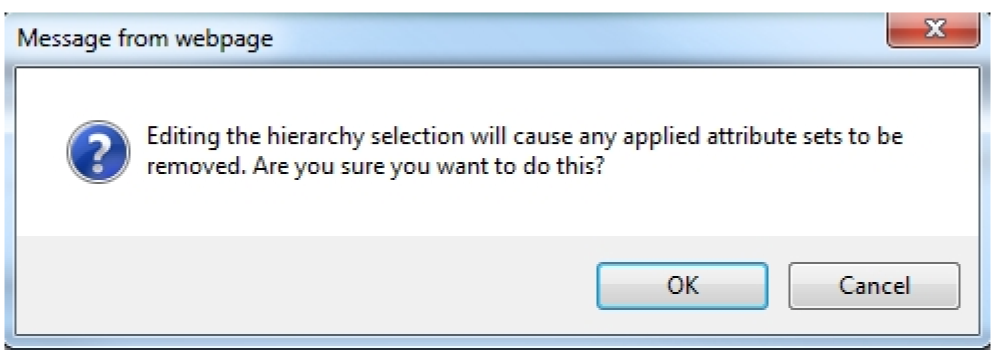
To modify the selected product hierarchies, do the following:

1. From the Product Groups page, select an Attribute–Based Product Group. The corresponding configuration page is displayed.

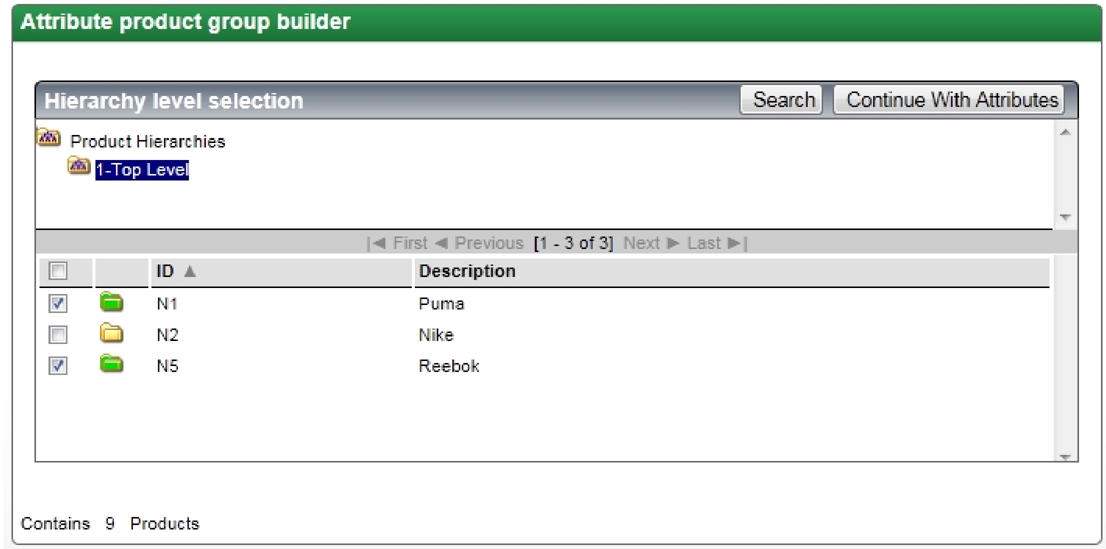


Note: Selecting a product hierarchy highlights the Product Hierarchies section; and hovering the mouse over a product hierarchy displays a tooltip.

2. In the Product Selection section, select a product hierarchy. The following window is displayed.



3. Selecte **OK**. The application displays the Hierarchy level selection.

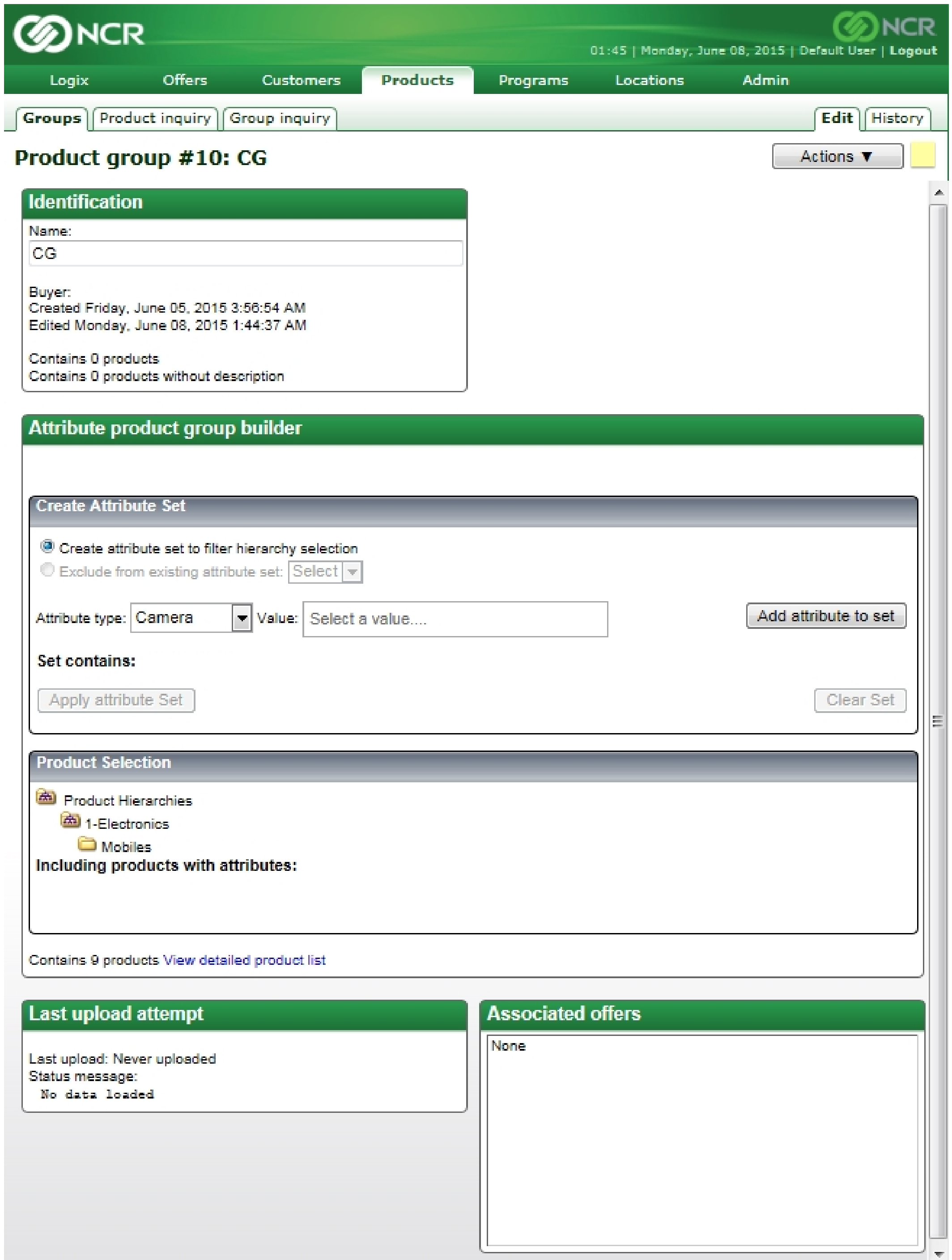


4. Do any of the following:
   - Add new items. For more information, refer to *Adding Items from Product Hierarchies for Attribute Product Groups* on page 442.
   - Uncheck the selected hierarchy nodes to delete the items from the product group.
5. From the Actions menu, select **Save** to apply the changes.

Creating Product Attribute Sets

To create product attribute sets, do the following:

1. From the Product Groups page, select an attribute–based product group. The corresponding Product Group Edit sub–page is displayed.

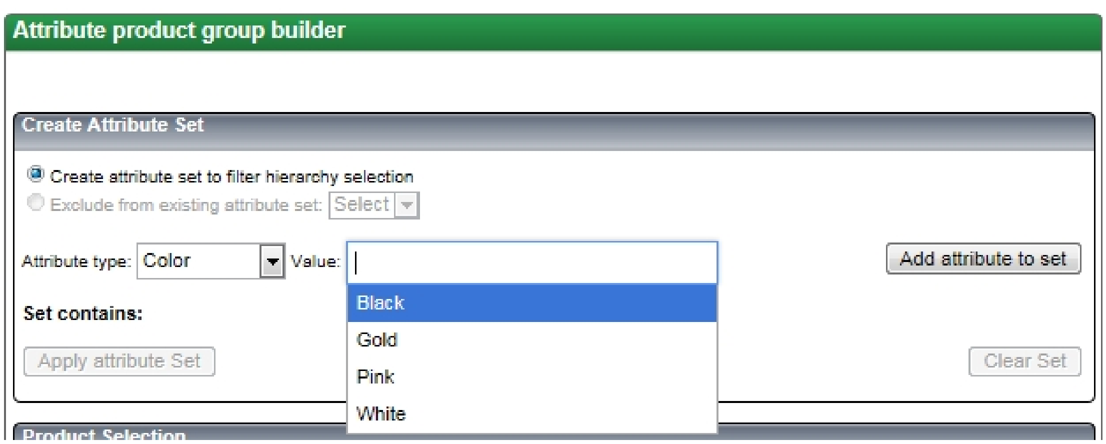


Note: In the Create Attribute Set section, the **Create attribute set to filter hierarchy selection** option is selected by default.

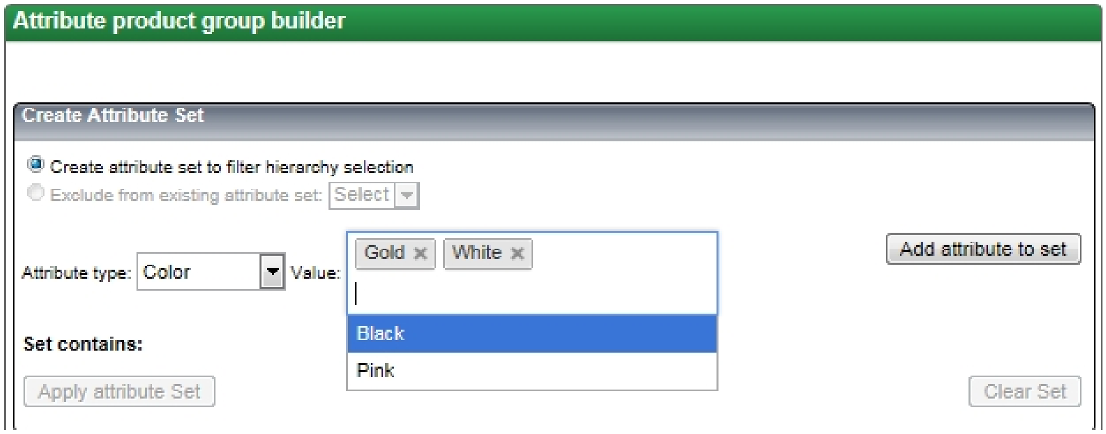
The Attribute product group builder displays the following sections:

Section	Description
Create Attribute Set	Permits users to create attribute sets using the following: • **Create attribute set to filter hierarchy selection**—permits users to specify that the attribute set under construction is used to filter the hierarchy selection. • **Exclude from existing attribute set**—permits users to exclude all products under an included attribute set. • **Attribute type**—displays attribute types based on the selected product set from the selected hierarchy. • **Value**—displays the corresponding available values of the selected attribute type. The values are based on the selected product set from the selected hierarchy. • **Set Contains**—displays the created attribute set. • **Add attribute to set**—adds the selected attribute–value pair. • **Apply attribute set**—applies the attribute set to the selected product set. • **Clear set**—deletes the selected attribute–value pair.
Product Selection	Permits users to modify the selected product hierarchies and attribute set. **Note:** The total number of products in the selected hierarchy nodes is displayed at the bottom of the Attribute Product Group Builder.

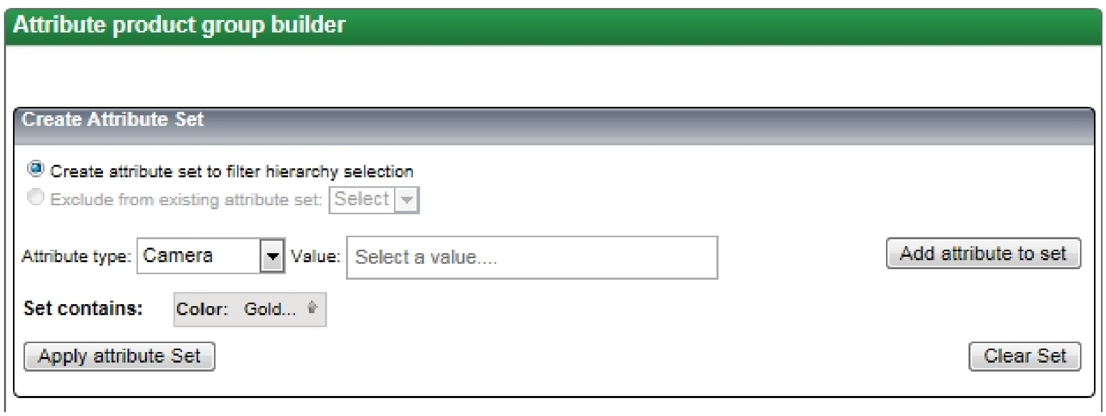
2. In the Create Attribute Set section, select an attribute from the Attribute type drop–down list.
3. Select the **Value** field. The corresponding values are displayed.



4. Select a value or values. The application displays the following details:

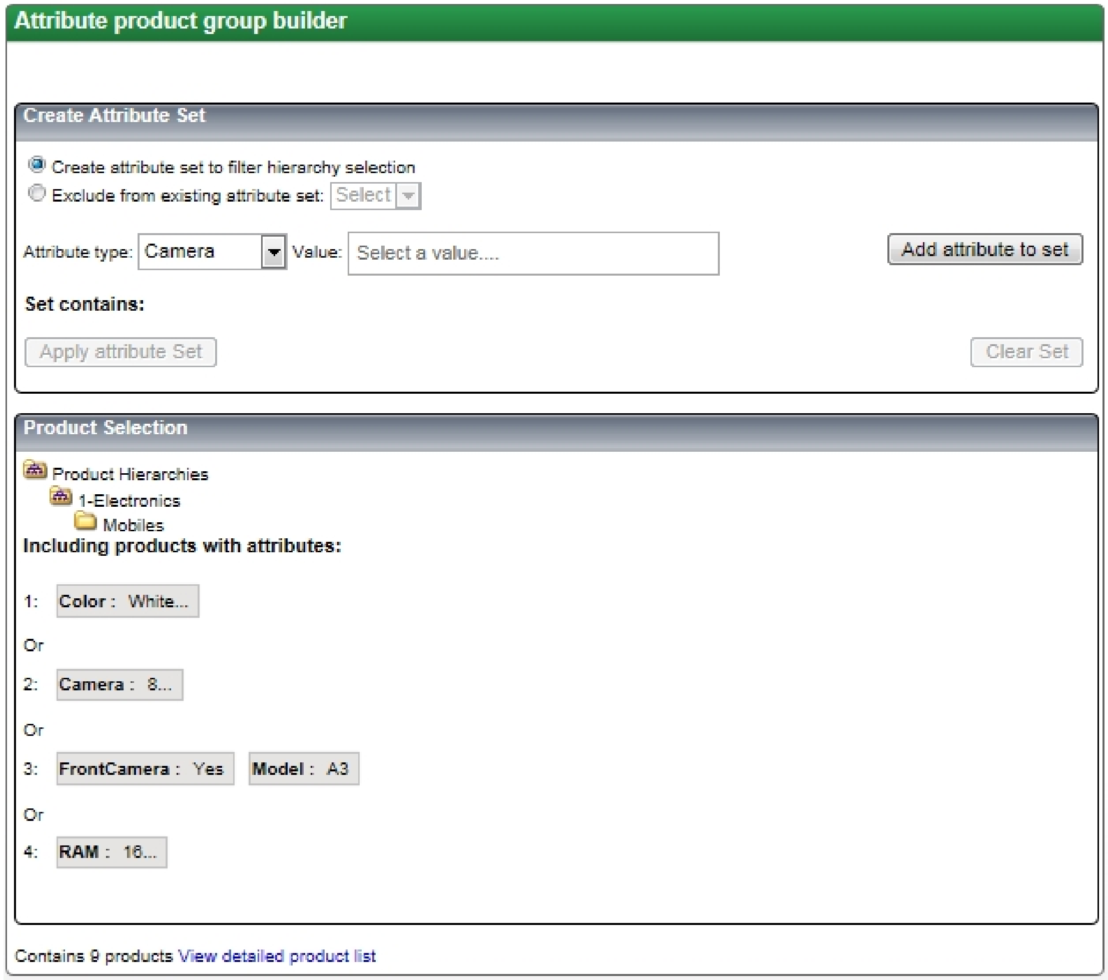


5. Select the **Add attribute to set** button. The attribute set details are displayed in the Set contains field.



Note: To add more than one attribute–value/values pair to an attribute set, select another attribute type with corresponding value/values.

6. Select the **Apply attribute Set** button to apply the attributes to the product group. The attribute set with corresponding set number is displayed in the Product Selection section.



Note: The image above shows multiple attribute sets for a product group. Logix permits users to create multiple attribute sets, which are Or–ed.

Example: White mobile phone or , Mobile phone with 8MP camera or, Mobile phone with frontcamera A3 model or, 16G RAM.

7. Do any of the following:

   - Exclude a set of products from any of the attribute sets. For more information, refer to *Excluding Product Attribute Sets* on page 457.

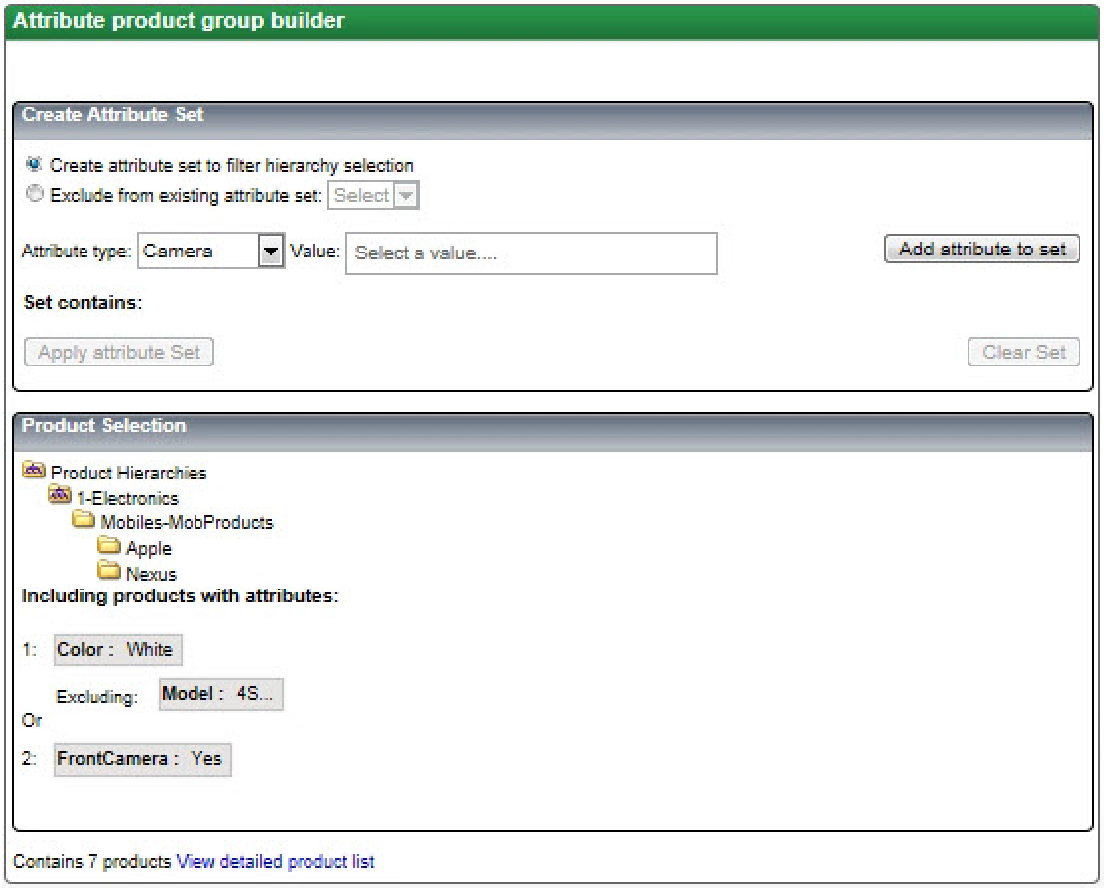
   - Select the **View detailed product list** hyperlink displays the list of products in the selected hierarchies and attribute set. For more information, refer to *Excluding Attribute–Based Items* on page 462.

8. From the Actions menu, select **Save**.

Modifying Attribute Sets

To modify an attribute set, do the following:

1. From the Product Groups page, select an Attribute–Based Product Group. The corresponding configuration page is displayed.

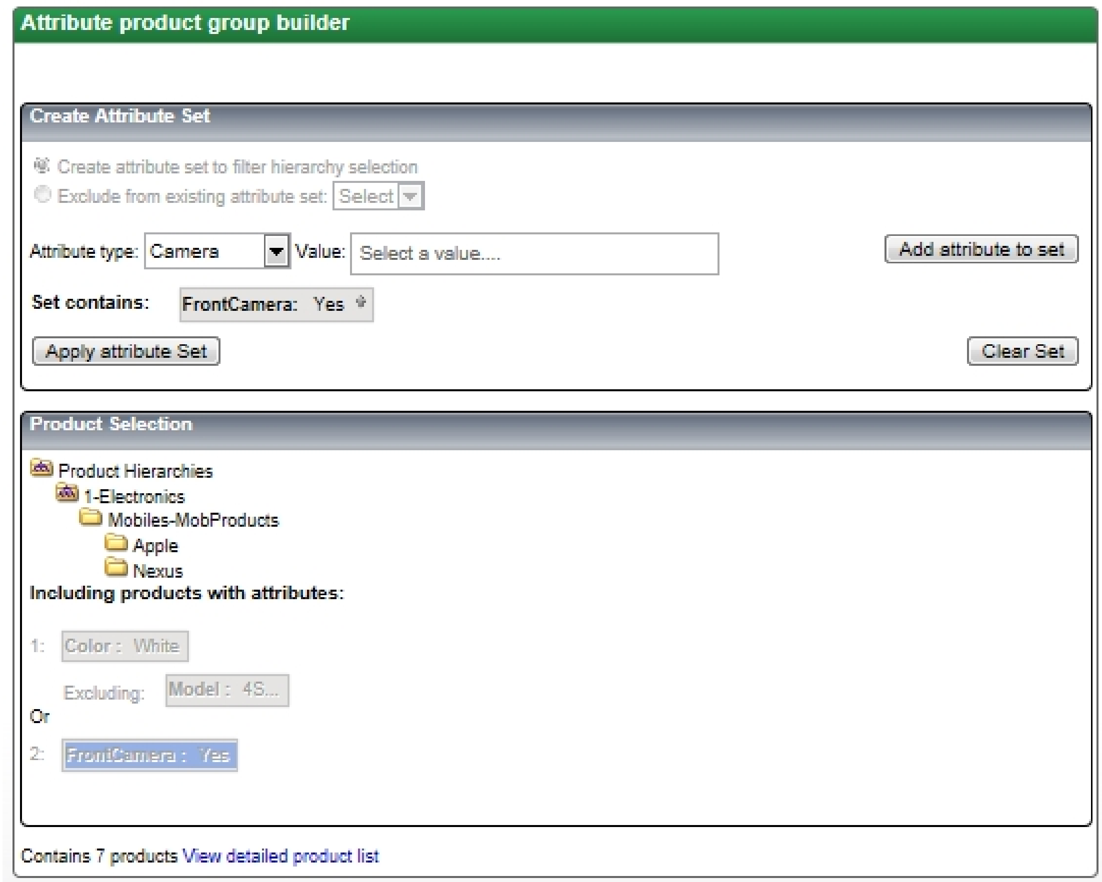


2. In the Product Selection section, select any of the following:
   - Included attribute set
   - Excluded attribute set

   Note: If an excluded attribute set is modified, its corresponding Included attribute set number is displayed in the Exclude from existing attribute set drop–down list.

   The selected attribute set is displayed with a blue highlight and also displayed in the Create Attribute Set section. The radio buttons are disabled.

   Example: This procedure modifies an included attribute set as an example.



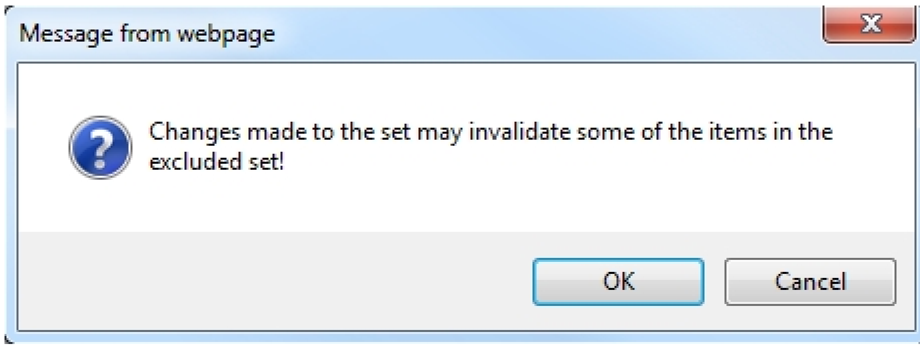
Note: Attribute sets that are not selected are disabled so that only the selected attribute set can be modified.

3. Do any of the following:
   - Add attribute–value pairs. For more information, refer to *Creating Product Attribute Sets* on page 448.
   - Delete attribute–value pairs. For more information, refer to *Deleting Product Attribute Sets* on page 455.

For more information, refer to *Creating Product Attribute Sets* on page 448.

4. Select the **Apply attribute Set** button to apply the attributes to the product group. The modified attribute set is displayed in the Product Selection section.

Note: If the modified attribute set has an excluded attribute set, the following pop–up window is displayed. Select **OK** to apply the changes.

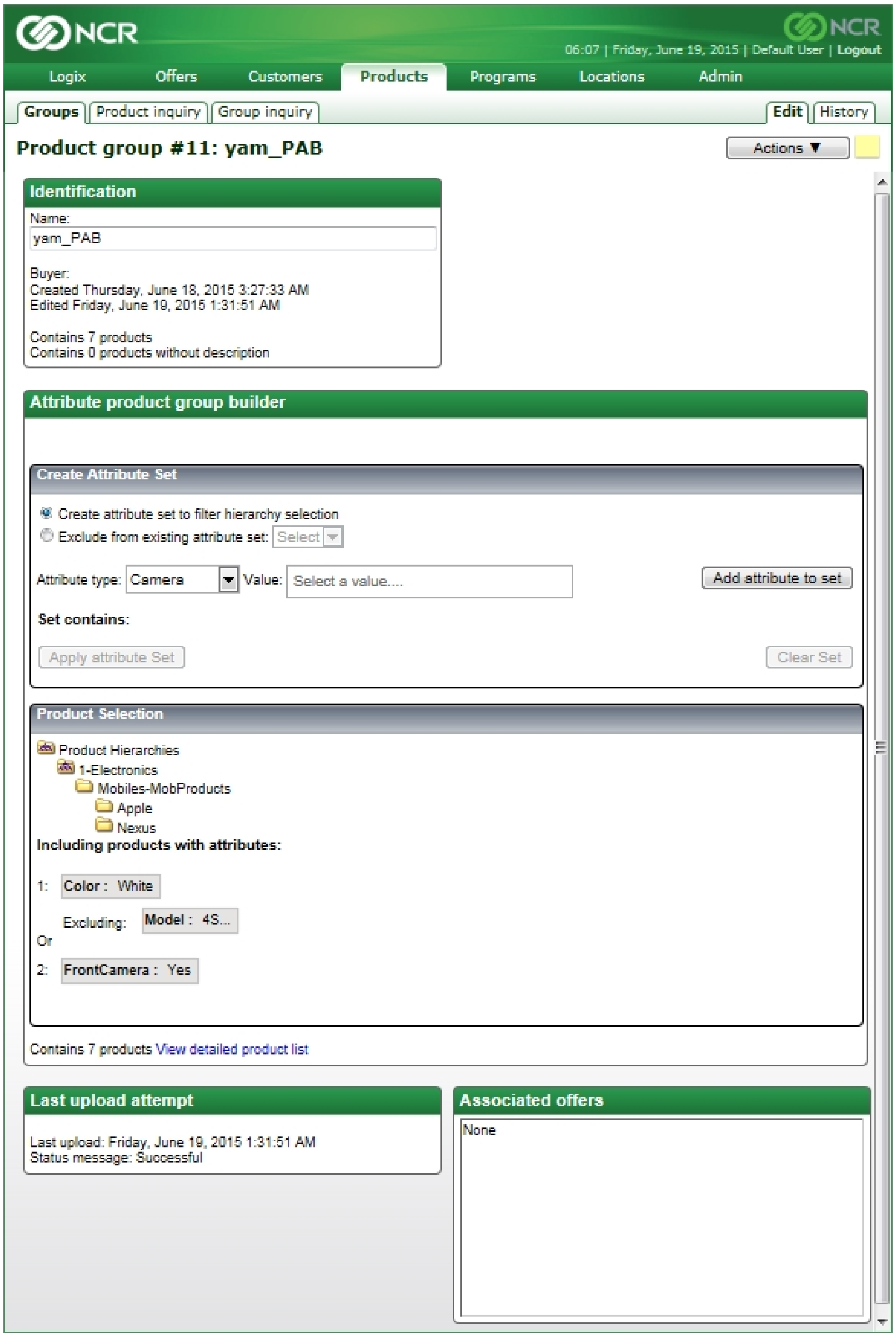


5. From the Actions menu, select **Save** to apply the changes to the product group.

Deleting Product Attribute Sets

To delete product attribute sets, do the following:

1. From the Product Groups page, select an attribute–based product group. The corresponding Product Group Edit sub–page is displayed.

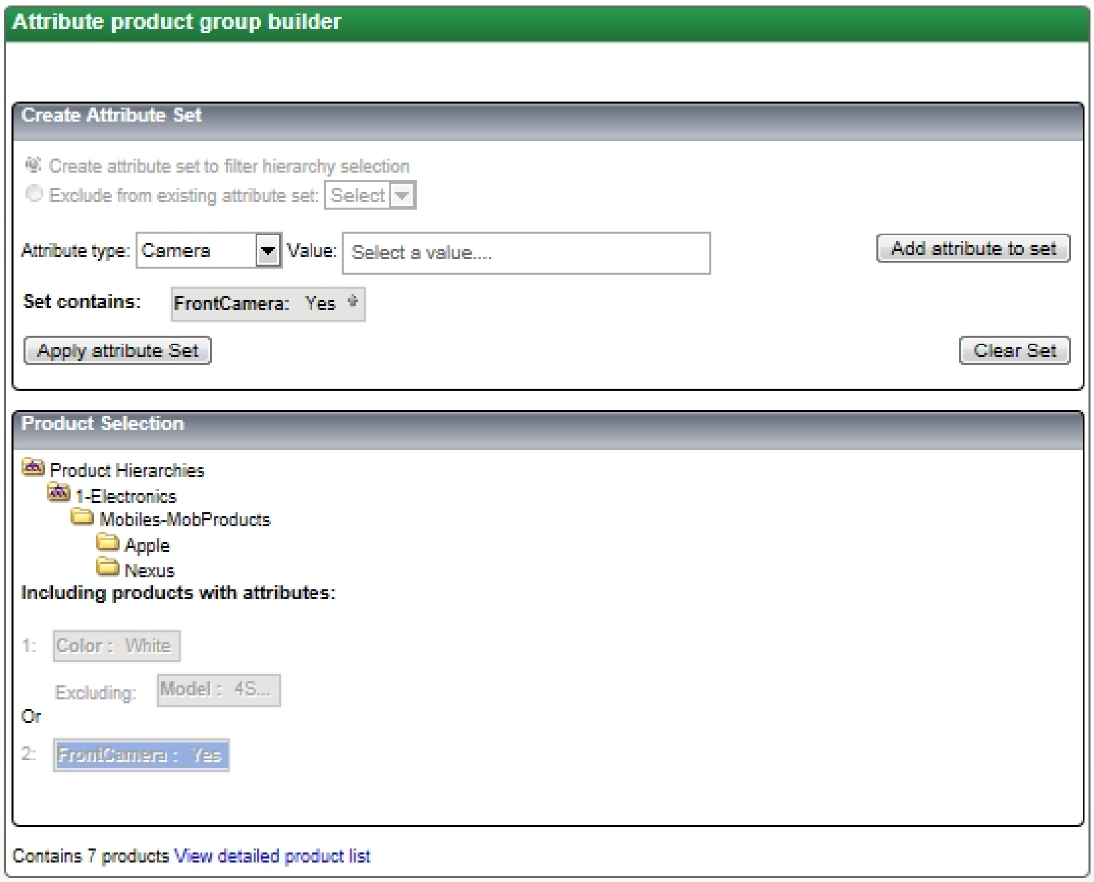


Note: In the Create Attribute Set section, the **Create attribute set to filter hierarchy selection** option is selected by default.

2. In the Product Selection section, select any of the following:
   - Included attribute set
   - Excluded attribute set

   The selected attribute set is displayed with a blue highlight and also displayed in the Create Attribute Set section.

   Example: This procedure deletes an included attribute set as an example.



3. In the Create Attribute Set section, select **Clear Set**. The selected attribute set is deleted from the Create Attribute Set and Product Selection sections.

Note: If the selected attribute set is an Included attribute set with an Excluded attribute set, the Excluded attribute is also be deleted.

Note: If the selected attribute set is only an Excluded attribute set, the Included attribute set is retained.

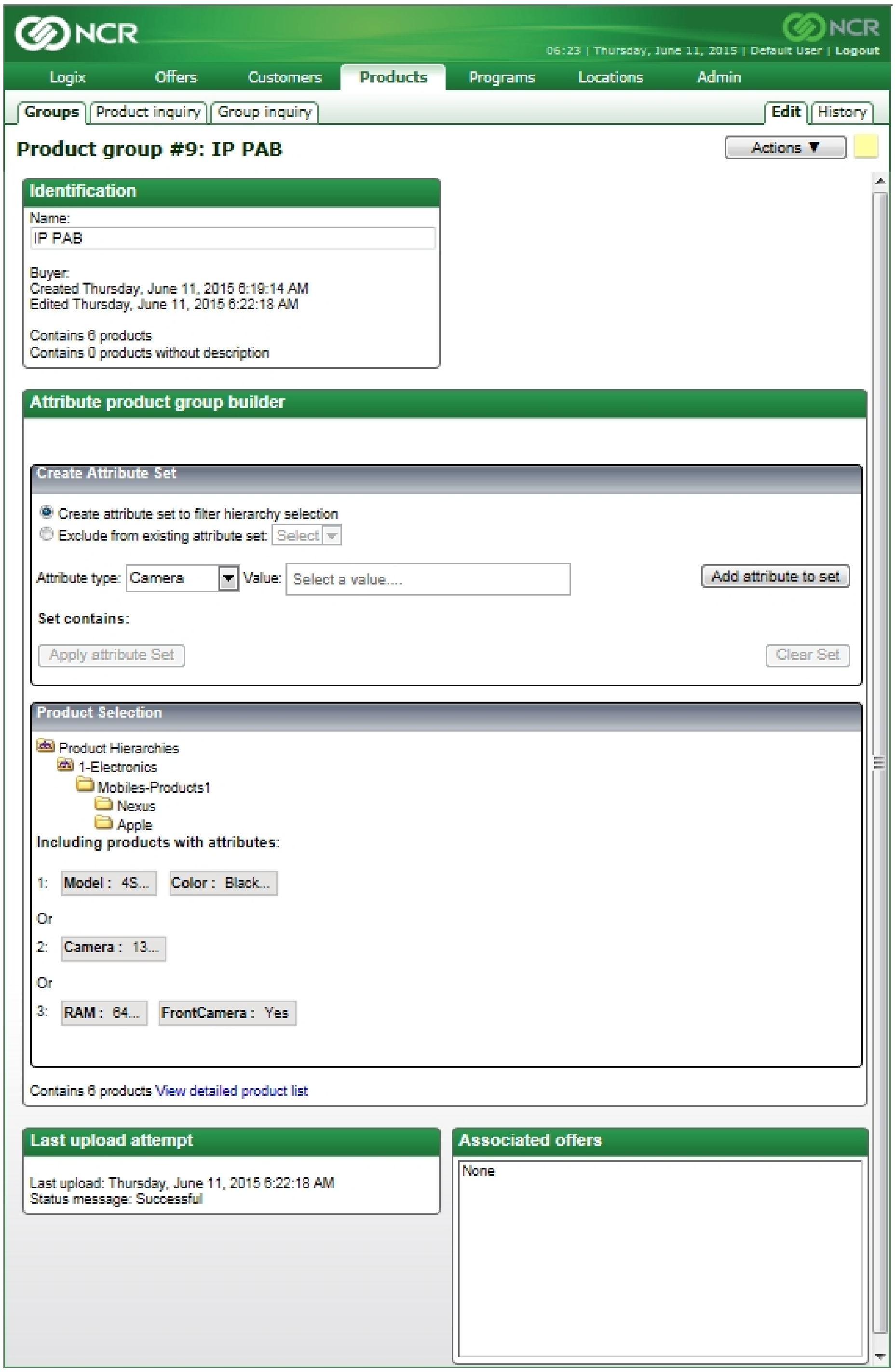
4. From the Actions menu, select **Save**.

Note: To modify attribute sets, refer to *Modifying Attribute Sets* on page 452.

Excluding Product Attribute Sets

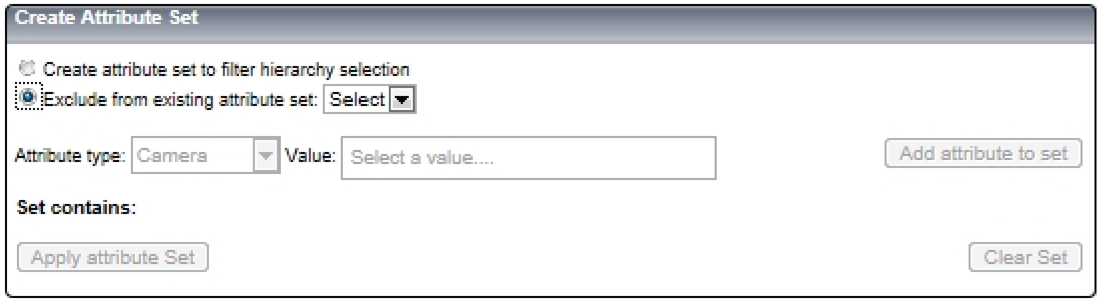
To exclude products based on attribute sets, do the following:

1. From the Product Groups page, select an attribute–based product group. The corresponding Product Group Edit sub–page is displayed.



Note: In the Create Attribute Set section, the **Create attribute set to filter hierarchy selection** option is selected by default.

2. In the Create Attribute Set section, select **Exclude from existing attribute set**. The Select drop–down list is enabled.



Note: The Exclude from existing attribute set option is disabled if all attribute sets have excluded sets.

3. Select a set number that corresponds with an attribute set in the Product Selection section.

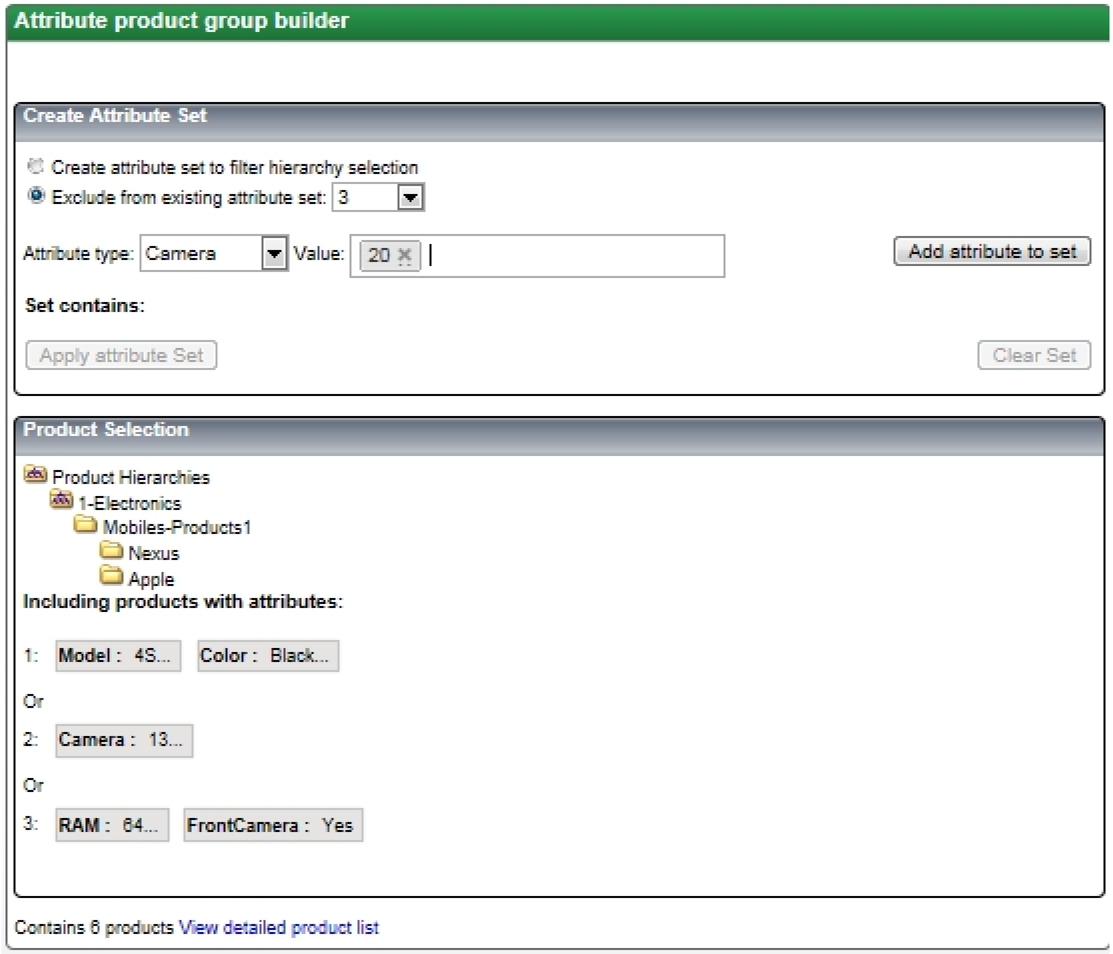
Note: If there are multiple attribute sets, only the set number without excluded sets is displayed in the drop–down list.

4. From the Attribute type drop–down list, select an attribute type to exclude from the selected attribute set.

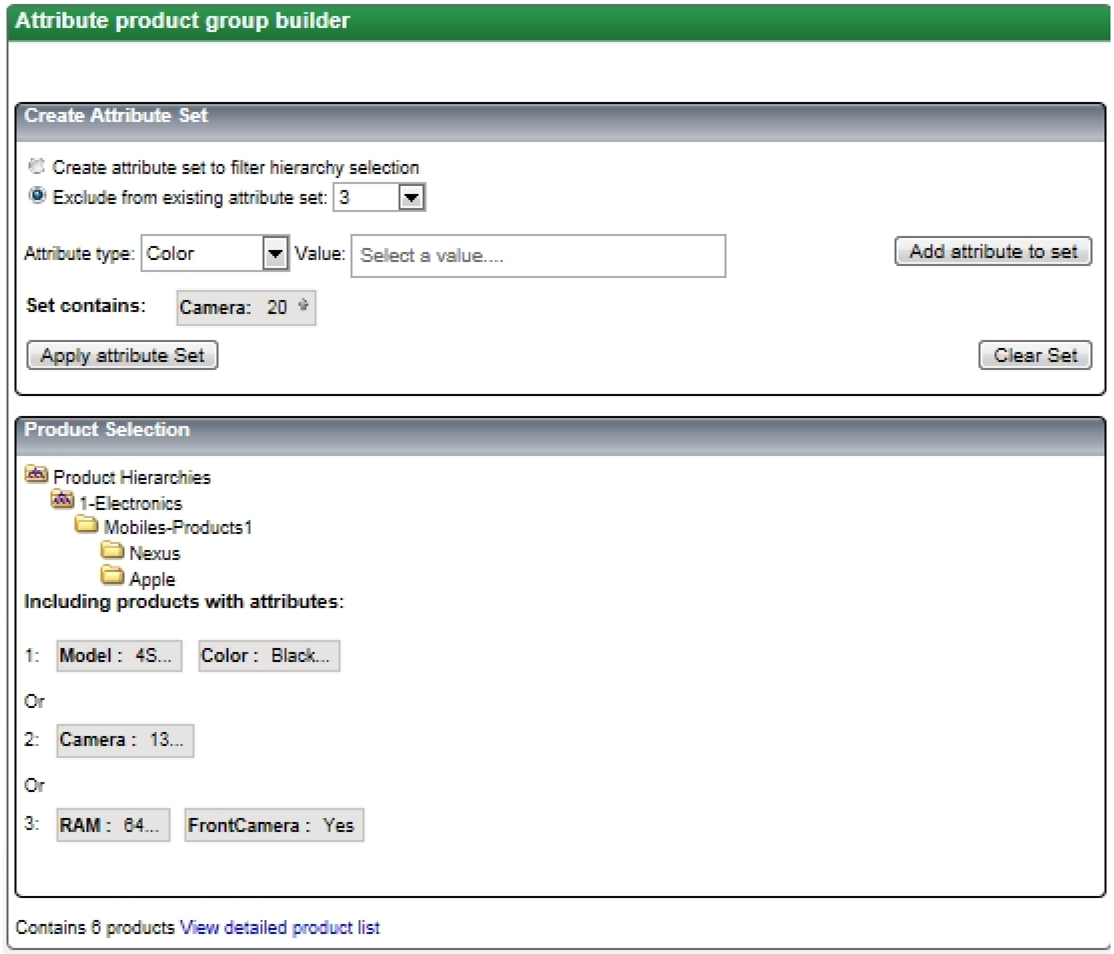
Note: The Attribute type and Value drop–down lists only display the corresponding values of the products that are included in the applied attribute set.

5. Select the **Value** field. The corresponding values are displayed.

6. Select a value or values. The application displays the following details:



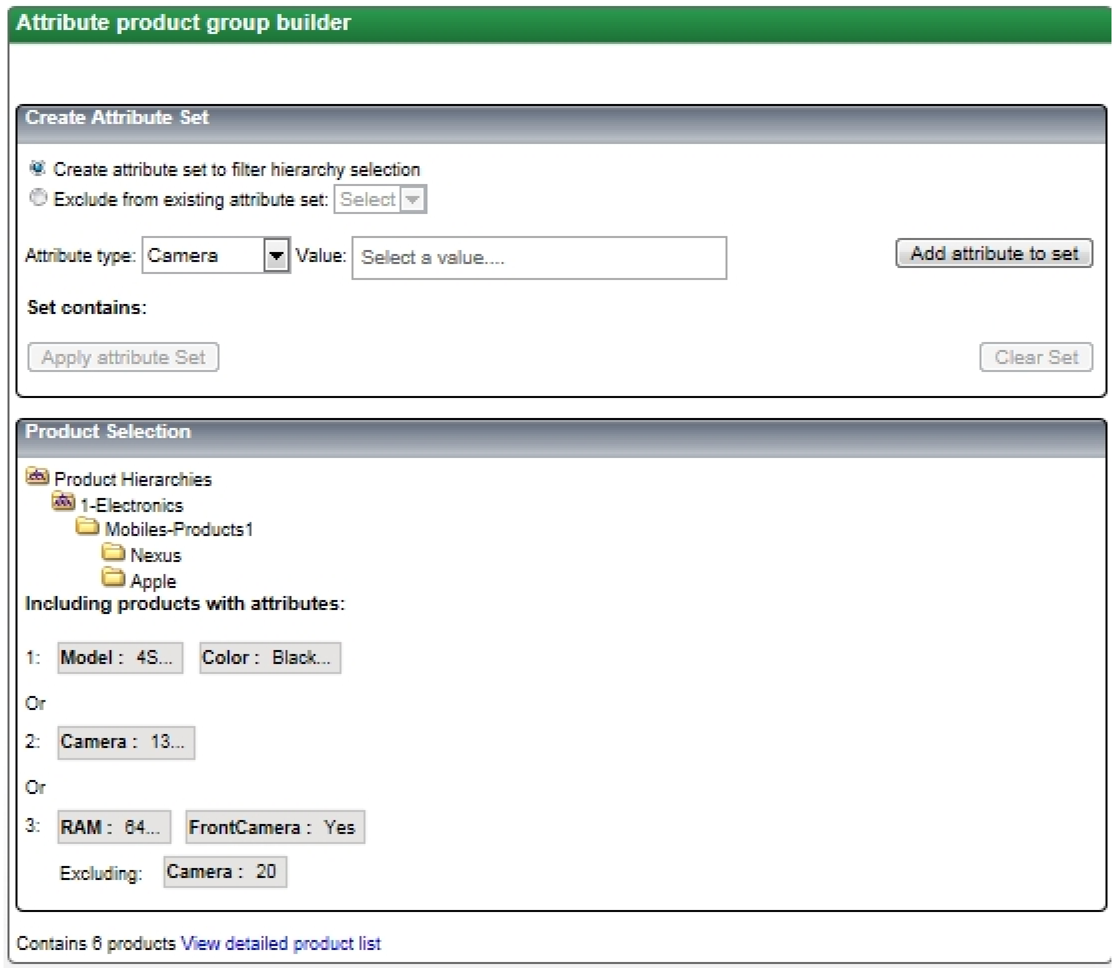
7. Select the **Add attribute to set** button. The attribute set details are displayed in the Set contains field.



Note: To add more than one attribute–value/values pair to an attribute set, select another attribute type with corresponding value/values.

8. Select the **Apply attribute Set** button to apply the attributes to the product group. The excluded attribute set is displayed under the selected attribute set number in the Product Selection section.

Note: Only one excluded set can be created for an applied attribute set.



Note: Selecting the **View detailed product list** hyperlink displays the list of products in the selected hierarchies and attribute set. For more information, refer to *Excluding Attribute–Based Items* on the next page.

9. From the Actions menu, select **Save**.

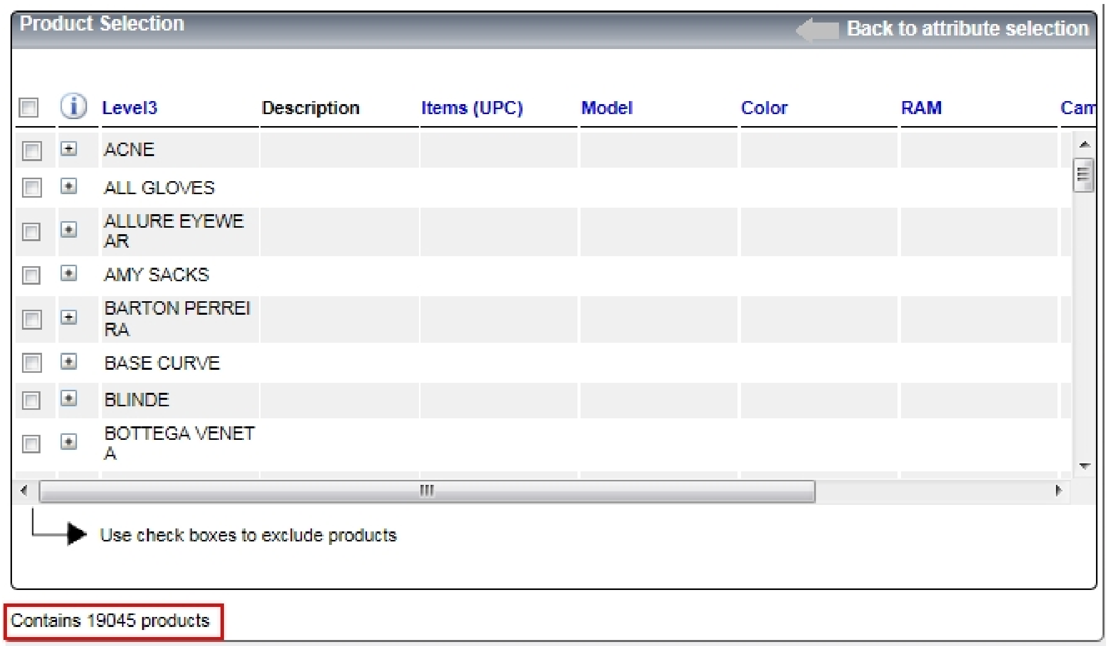
Note: Excluded products based on attribute sets are not displayed in the Detailed Product List.

Excluding Attribute–Based Items

To exclude items from attribute–based product groups, follow these steps:

1. From the Attribute Product Group Builder, select the **View detailed product list** hyperlink. The application displays the corresponding list of products and indicates below the Product Selection section, the number of products in the list.

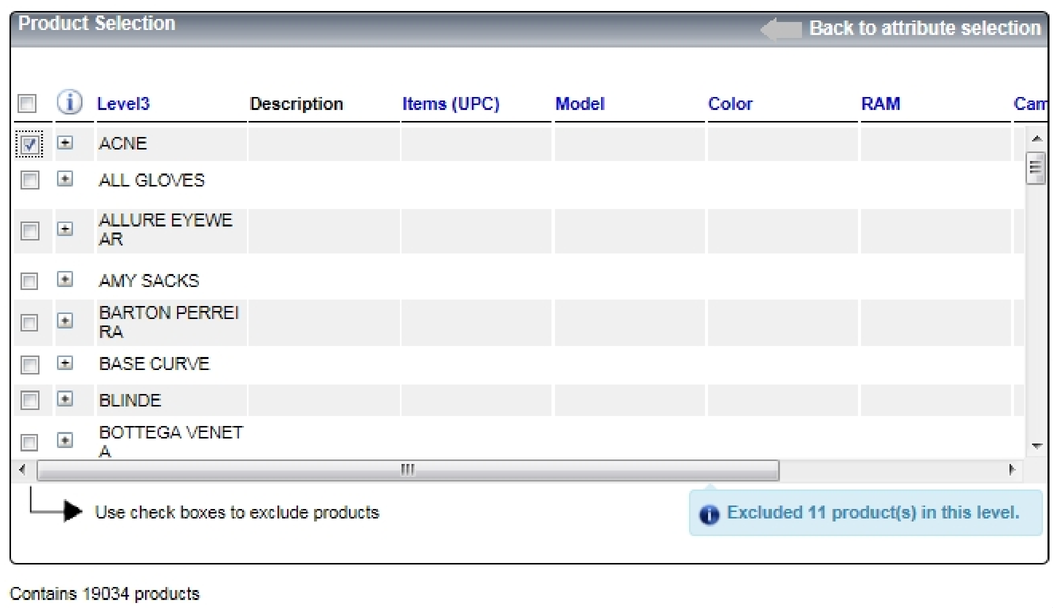
Note: This procedure shows a Detailed Product List with the product grouping enabled. For more information, refer to *Grouping Detailed Product List by Hierarchy Levels* on page 633.



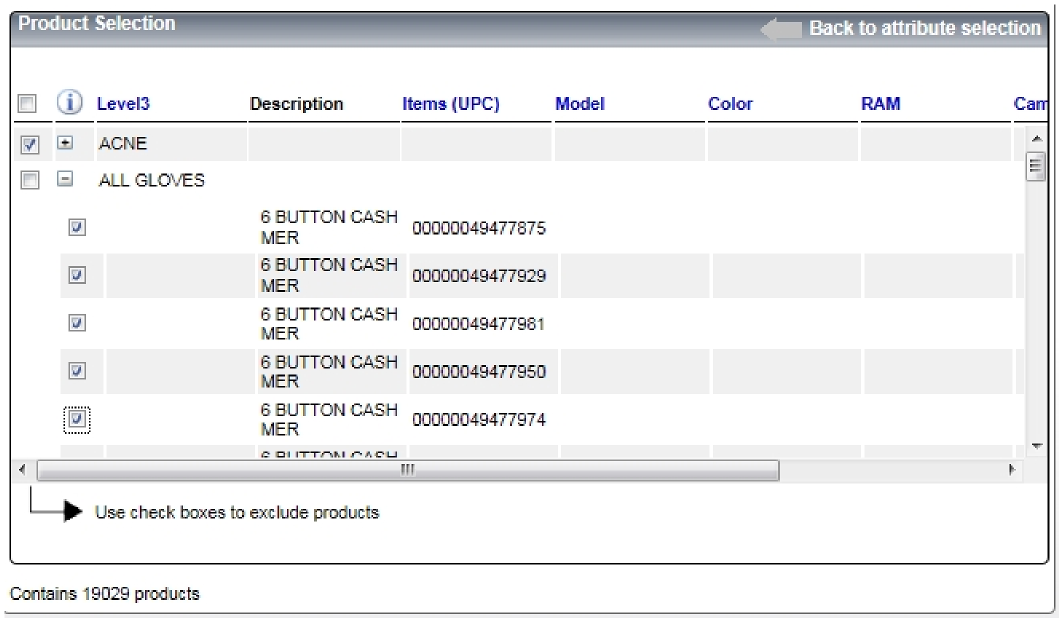
2. Do any of the following:

Note: Excluded products based on attribute sets are not displayed in the Detailed Product List. For more information, refer to *Excluding Product Attribute Sets* on page 457.

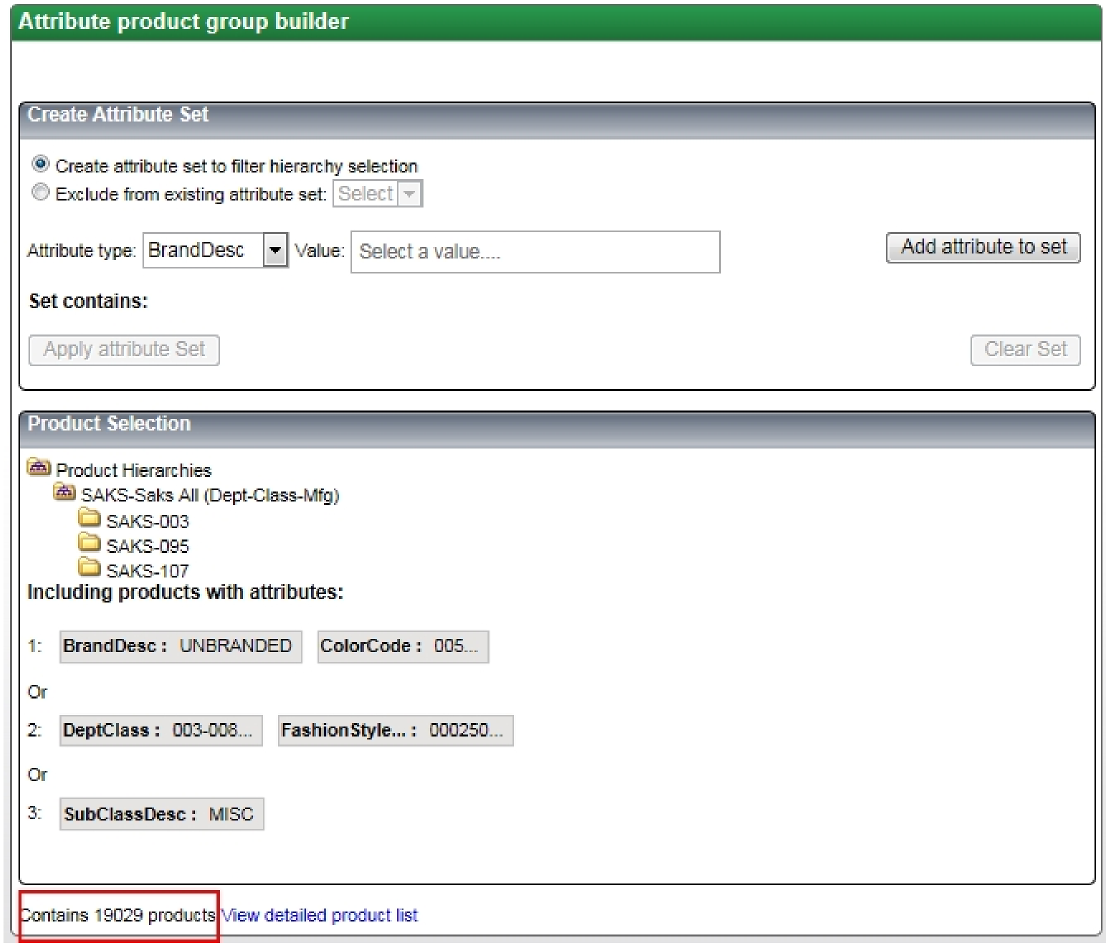
- To exclude all the products in a group, select the corresponding check box of the group to exclude from the attribute–based product group. The application displays the number of excluded products at the bottom–right section of the Detailed Product List.



- To exclude specific products, select the **+** button of the corresponding group to expand the list of items and then, select the check box of the corresponding items to exclude from the attribute–based product group.



3. Select **Back to attribute selection** to return to the Attribute Product Group Builder. The number of products indicated below the Product Selection section is modified.



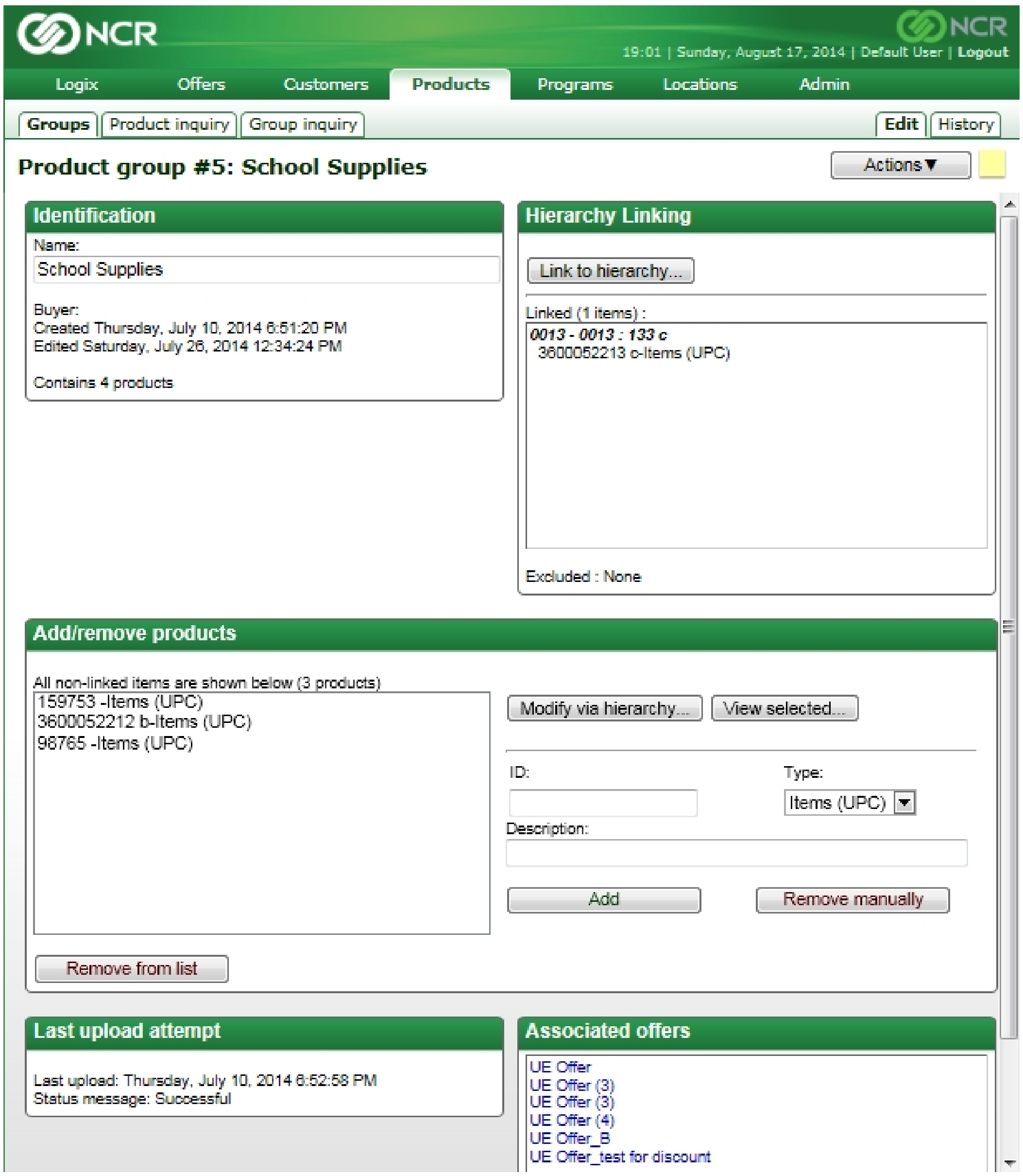
4. From the Actions menu, select **Save**.

Downloading Item Lists

The Product Group Configuration sub–page displays a list of the linked and excluded items from each of the selected folders. But, only the first hundred items are displayed on the page for quicker page load times in the list for each linked node. For a full list of all items in a product group, download a list of all the items in the group.

To download a list of Product IDs, follow these steps:

1. From the Product Groups page, select a product group name. The corresponding group configuration is displayed.



2. From the Actions button, select **Download**. The application downloads a plain text file that contains a list of Product IDs for the group.

Redeploying Product Groups

To deploy the updated product group without deploying the associated offers, use the **Redeploy** button from the Actions menu. Product groups are automatically deployed when the offers with which they are associated with are deployed.

Deleting Product Groups

To delete a product group, follow these steps:

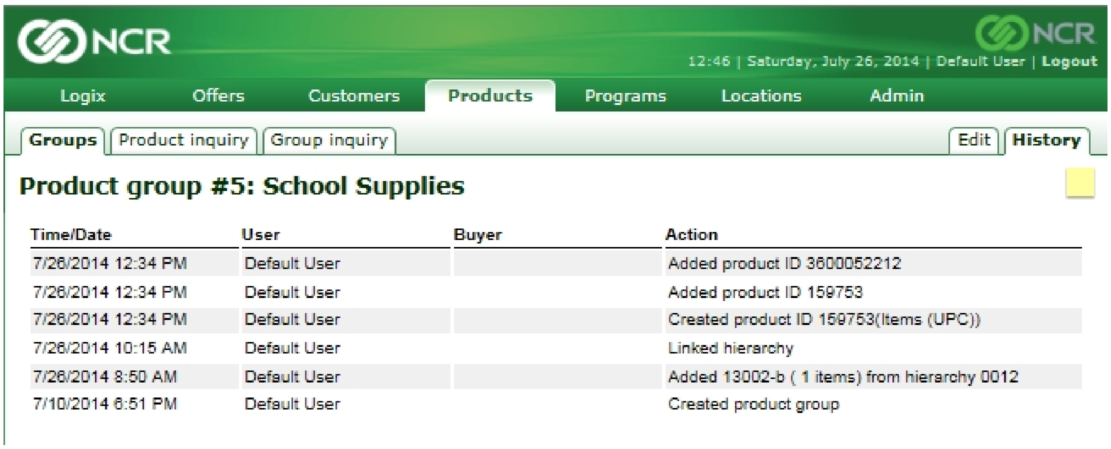
Note: Product groups associated with offers cannot be deleted.

1. From the Product Groups page, select a group name. The application displays the corresponding Product Group Configuration page.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**.

Tracking Product Group Changes

To view history details of a product group, follow these steps:

1. From the Product Groups page, select a product group name. The application displays the corresponding Product Group Configuration sub–page.
2. Select the **History** sub–page tab. The following example shows the History sub–page of a product group:



Note: Select the **Notes** icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Product Hierarchies

Product Hierarchies permit users to continuously use the same products in multiple product groups by linking a product hierarchy with product groups. Using this feature automatically applies the changes made to the product hierarchy to the product group without manually entering the products when creating product groups.

Example: A product removed from a product hierarchy is automatically removed from all product groups that are linked to the product hierarchy.

This section describes how to use product hierarchies.

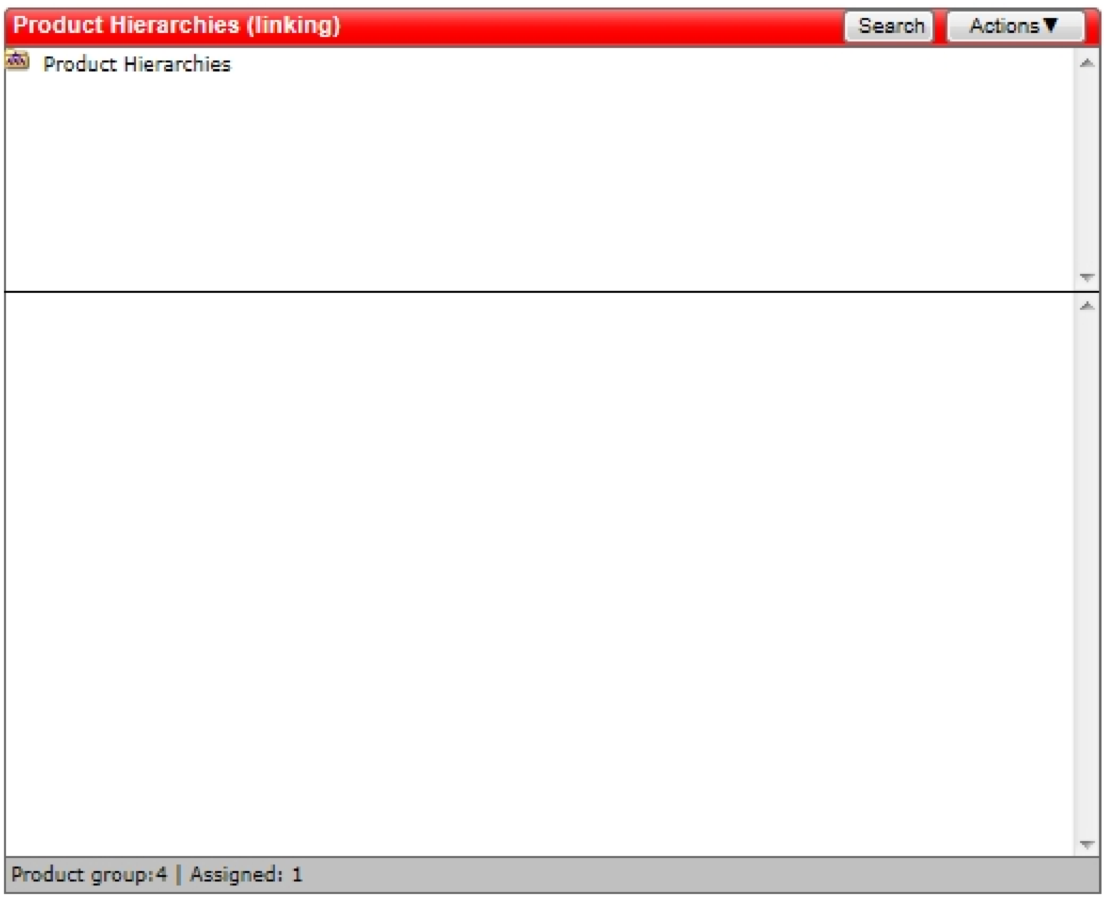
Associating Product Groups with Hierarchies

Associating product groups with a hierarchy effectively binds them to the items under the selected hierarchy.

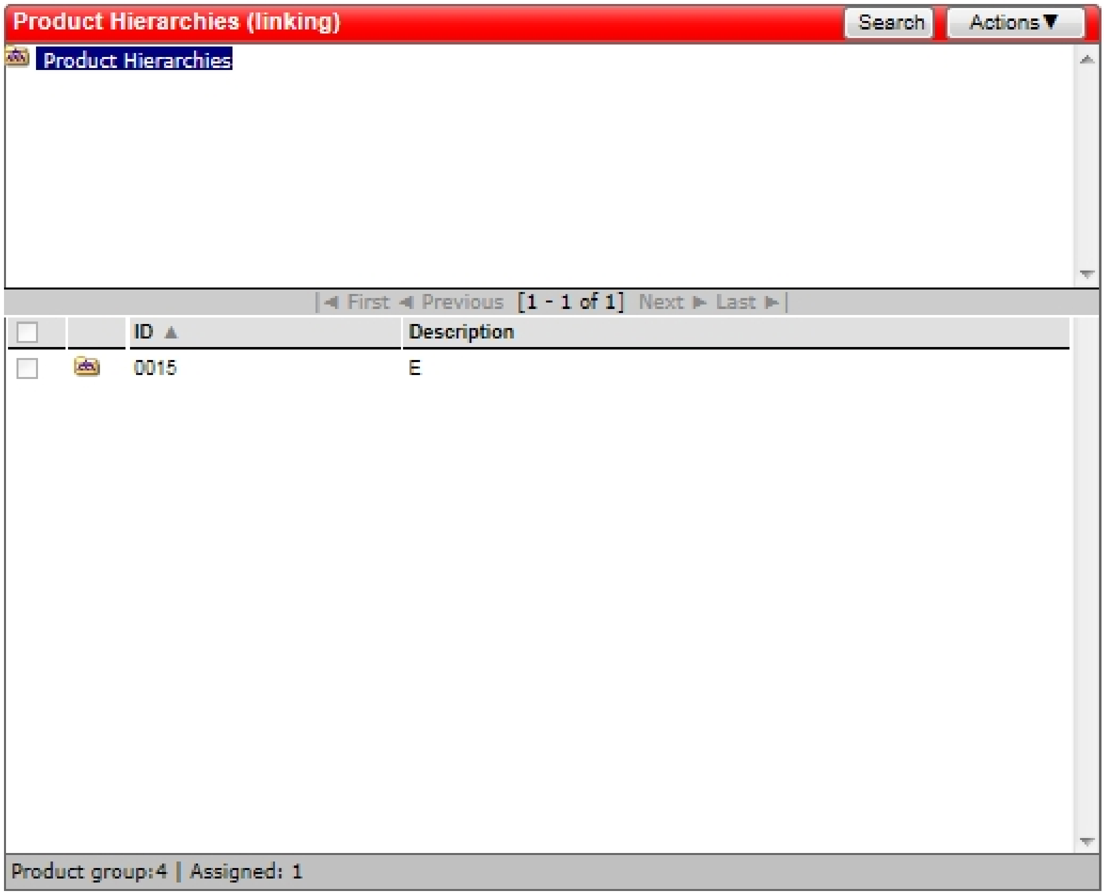
Note: Selecting a parent folder automatically links its child folders to the product group. To exclude a specific item from the product group, refer to *Excluding Items from Product Groups* on page 473.

To link a product group to a hierarchy, follow these steps:

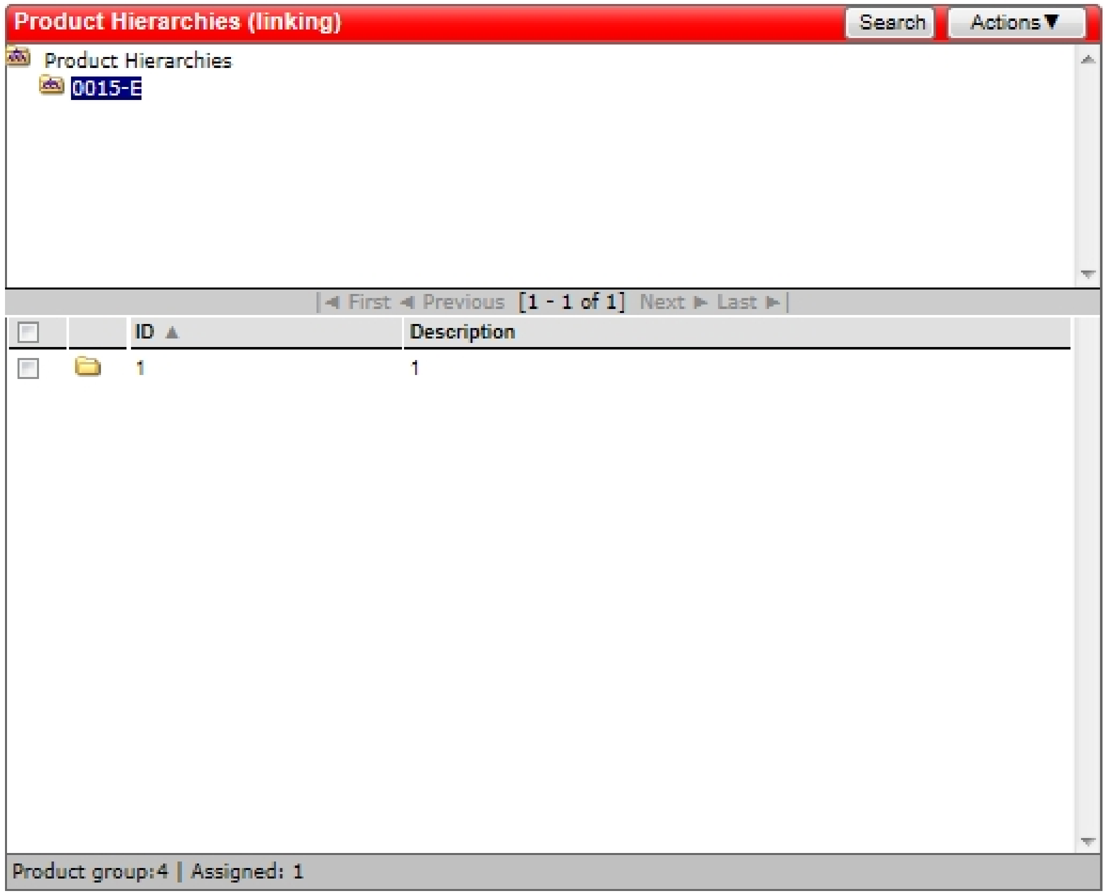
1. From the Product Groups page, select a product group. The corresponding product group configuration sub–page is displayed.
2. In the Hierarchy Linking section, select the **Link to hierarchy . . .** button. The Product Hierarchy window is displayed.



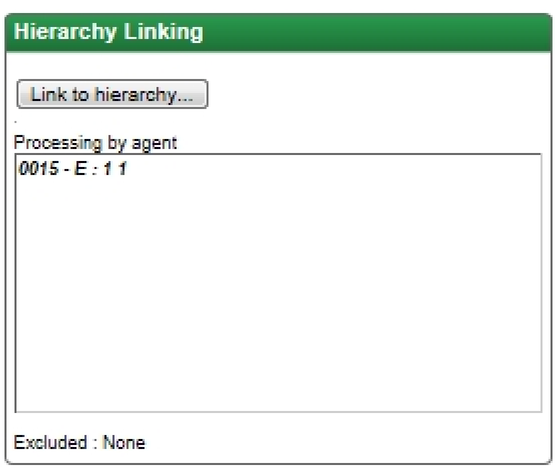
3. Select the **Product Hierarchies** node to display product hierarchies.



4. Double–click a product hierarchy to link with the product group. The application displays the selected folder under the Product Hierarchies node.



5. Select the hierarchy node check box under the product hierarchy.
6. From the Actions menu, select **Link to group**. The details are displayed in the Hierarchy Linking section on the Product Group Configuration sub–page, as shown in the following example:



Excluding Items from Product Groups

Logix allows users to exclude specific items under a product hierarchy that are linked with a product group.

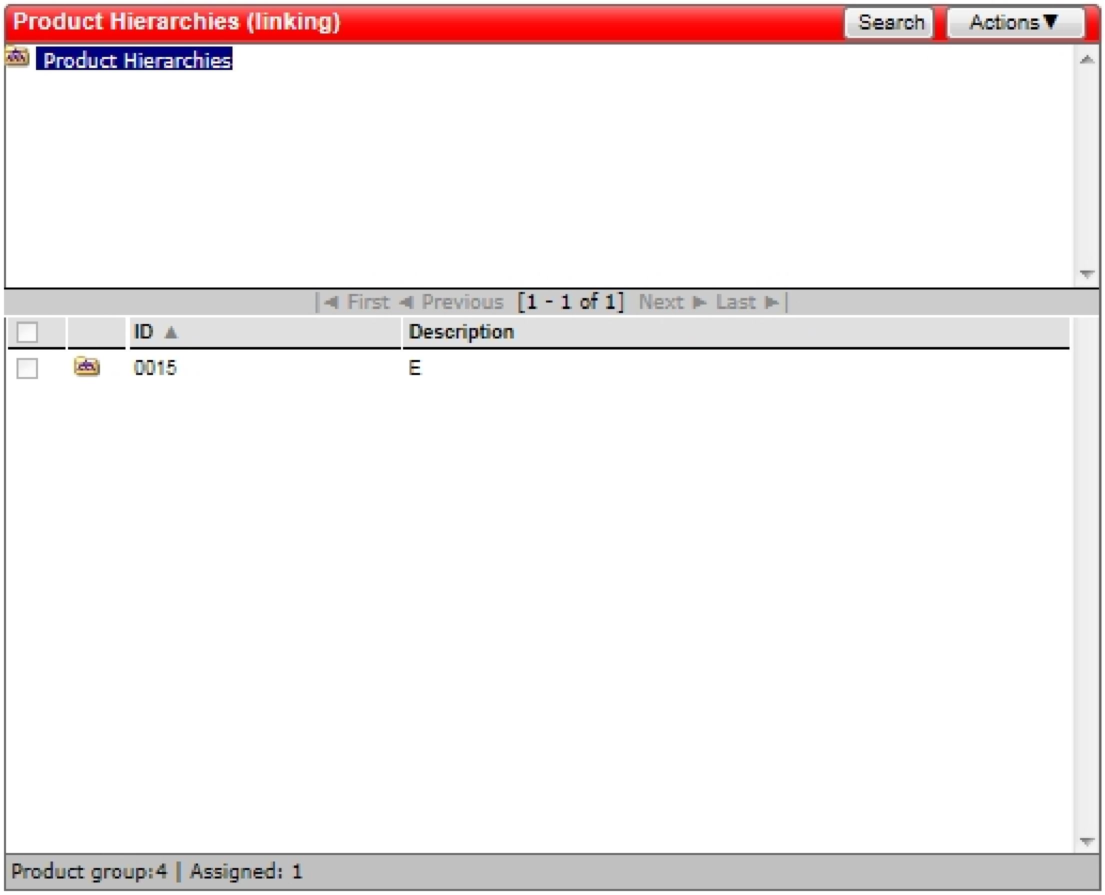
Example: Selecting a parent folder automatically links its child folders to the product group. If the parent folder "A" is linked to the product group its child folder "A1" is automatically included in the product group.

Note: Users can also exclude an entire hierarchy node from the product group.

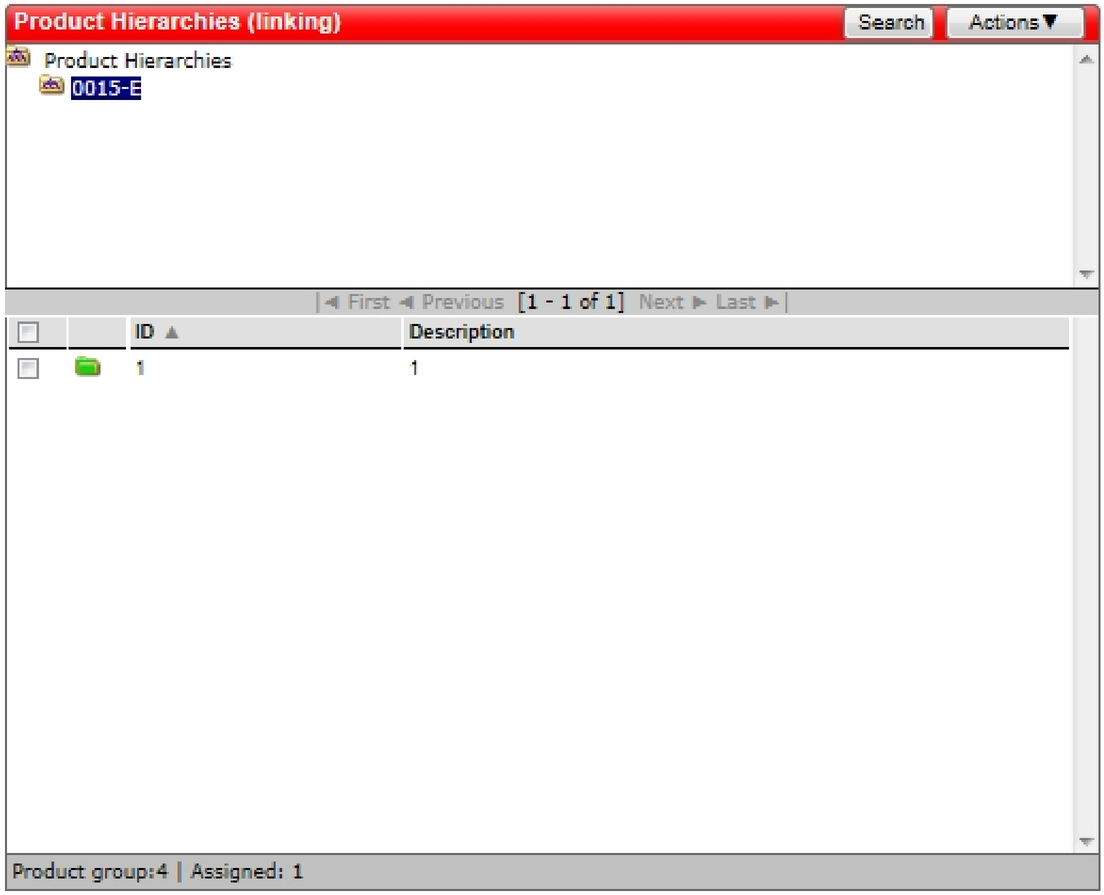
To exclude a specific item from linking with the product group, follow these steps:

1. From the Product Groups page, select a product group. The corresponding product group configuration sub–page is displayed.
2. In the Hierarchy Linking section, select the **Link to hierarchy . . .** button. The Product Hierarchy window is displayed.

3. Select the **Product Hierarchies** node to display product hierarchies.

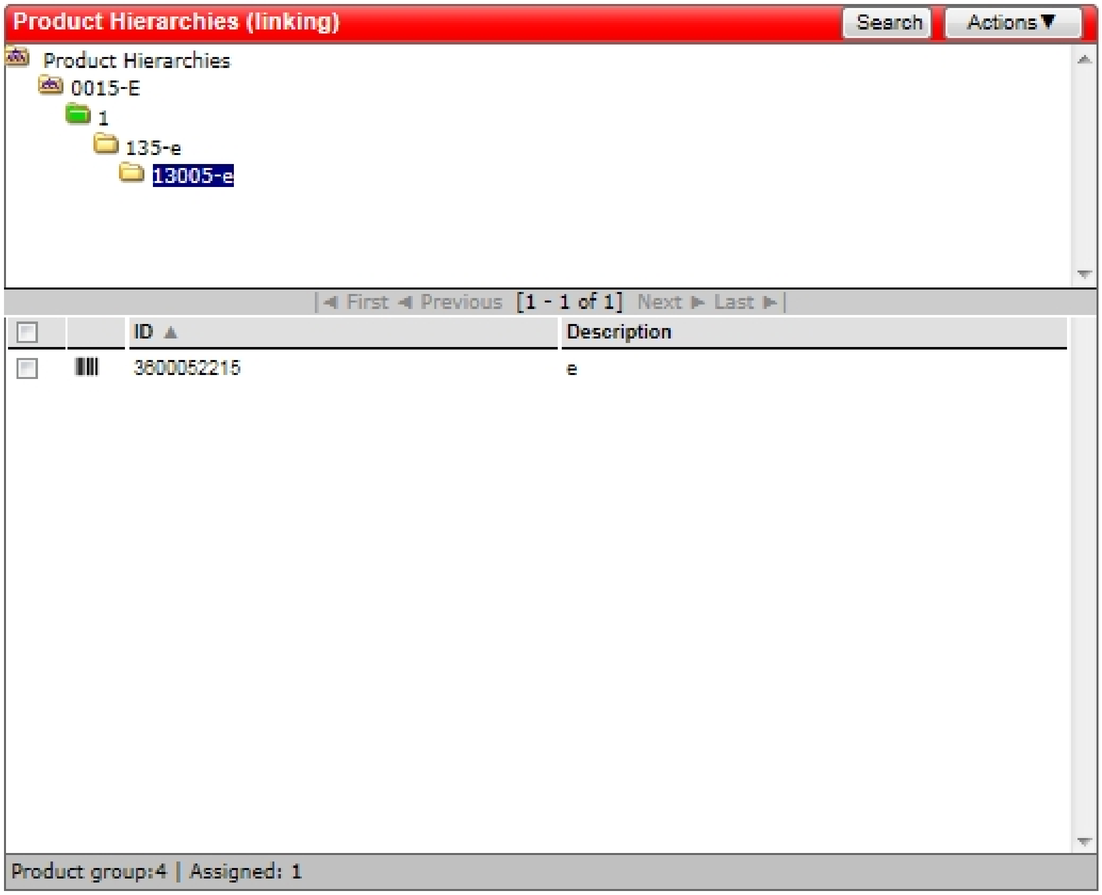


4. Double–click a product hierarchy to link with the product group. The application displays the selected folder under the Product Hierarchies node.



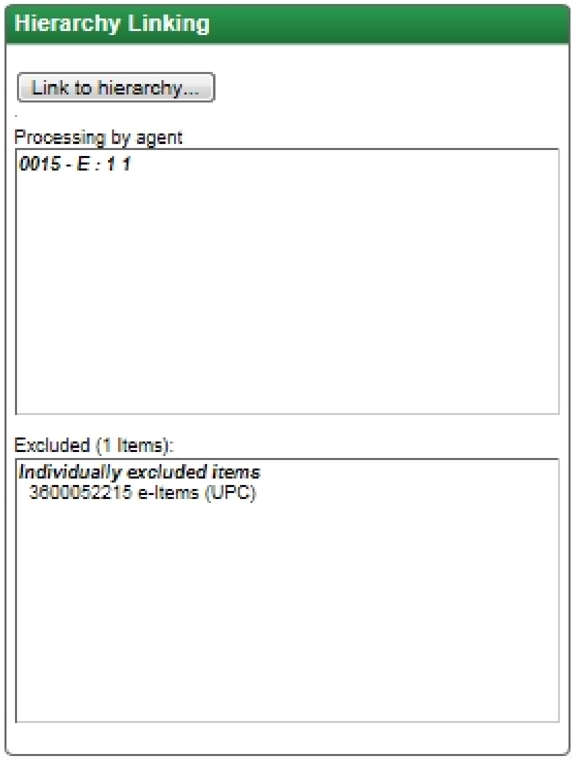
Note: Item group folders that are linked with the product group are highlighted green.

5. Double–click the linked item folder until it displays individual items, as shown in the following example:



6. Select a check box of the corresponding items that are to be excluded from linking with the product group.

7. From the Actions menu, select **Exclude from Group**.The Hierarchy Linking section in the Product Groups Configuration sub–page displays the excluded items, as shown in the following example:



Removing Product Groups from Hierarchies

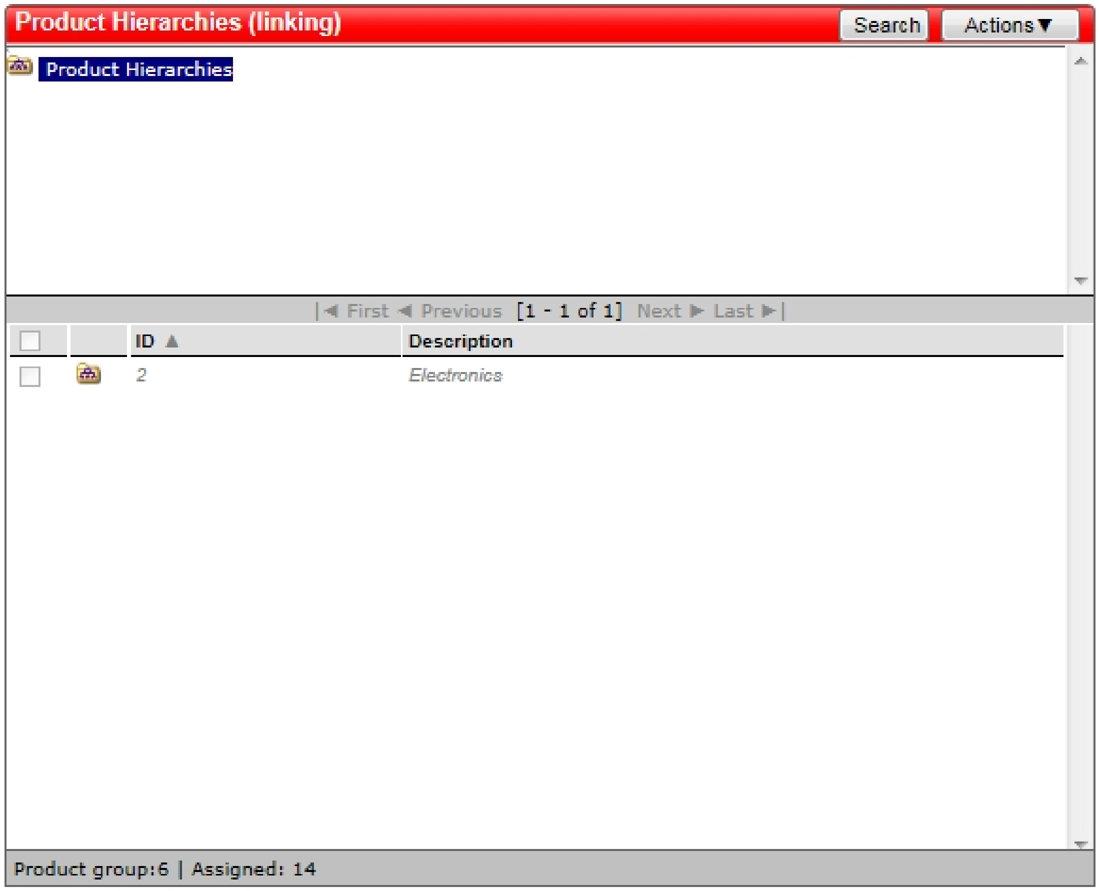
Logix permits users to remove linked product groups from a hierarchy.

Note: To link product groups with hierarchies, refer to *Associating Product Groups with Hierarchies* on page 470.

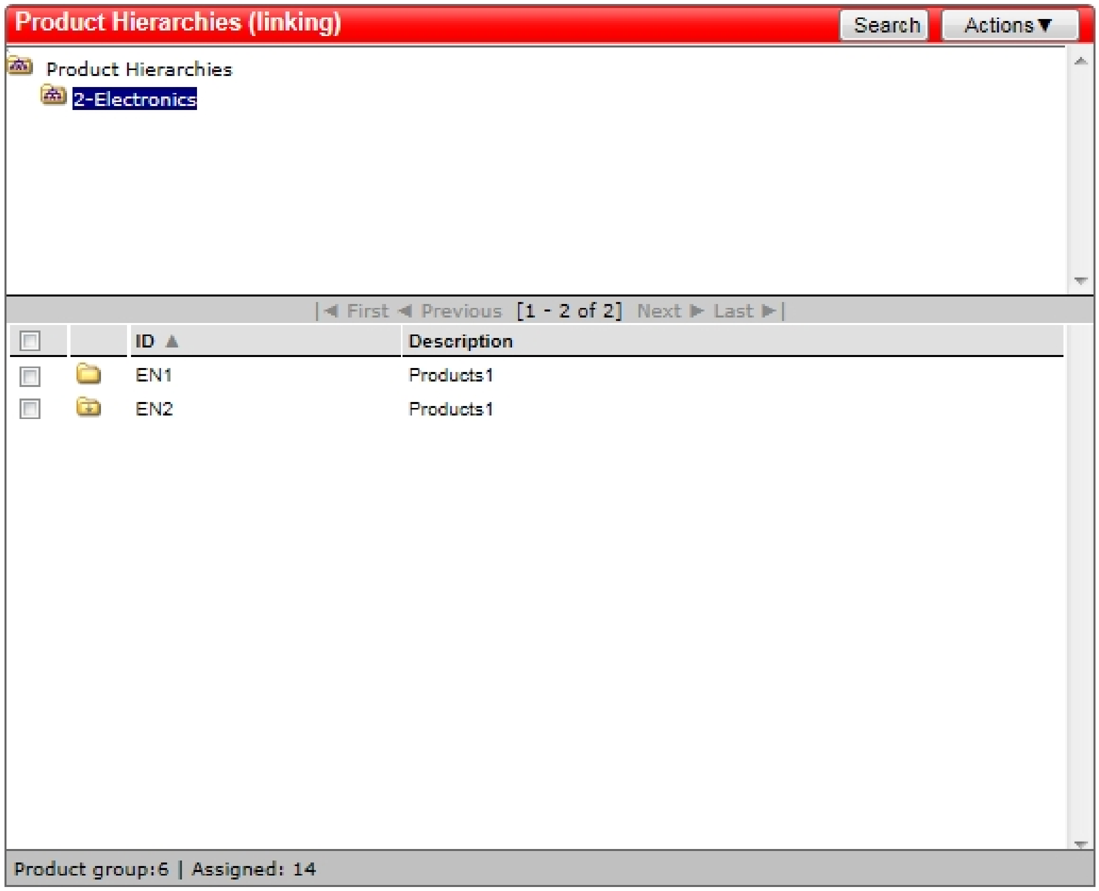
To remove a linked product group from a hierarchy, follow these steps:

1. From the Product Groups page, select a product group. The corresponding product group configuration sub–page is displayed.
2. In the Hierarchy Linking section, select the **Link to hierarchy . . .** button. The Product Hierarchy window is displayed.

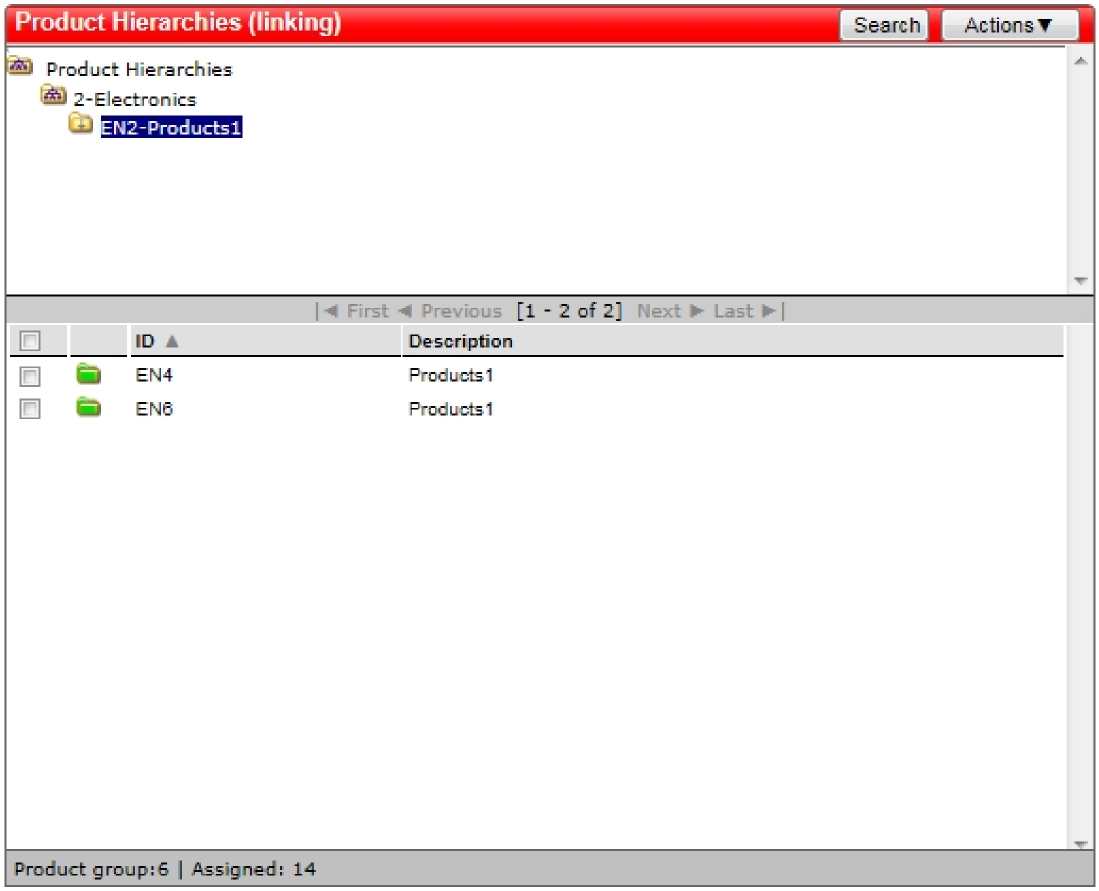
3. Select the **Product Hierarchies** node to display product hierarchies.



4. Select the **Product Hierarchies** node to display product hierarchies.



5. Double–click the product hierarchy linked with the product group. The application displays the item group folders that are linked with the product group.



Note: Item group folders that are linked with the product group are highlighted green.

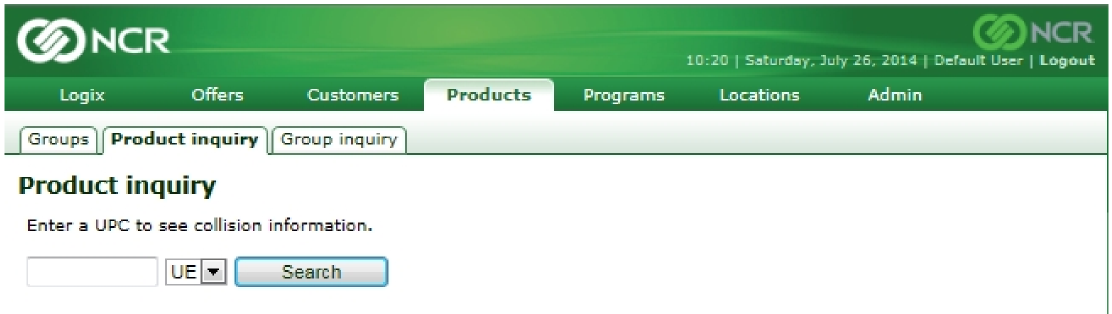
6. Select the check boxes of corresponding highlighted folders under the product hierarchy.

7. From the Actions menu, select **Remove Link to Group**. The Linked group is deleted from the Hierarchy Linking section on the Product Group Edit sub–page.

Using the Product Inquiry Page

To perform a product inquiry, follow these steps:

1. From the Products tab, select the **Product inquiry** page tab. The Product Inquiry page is displayed.

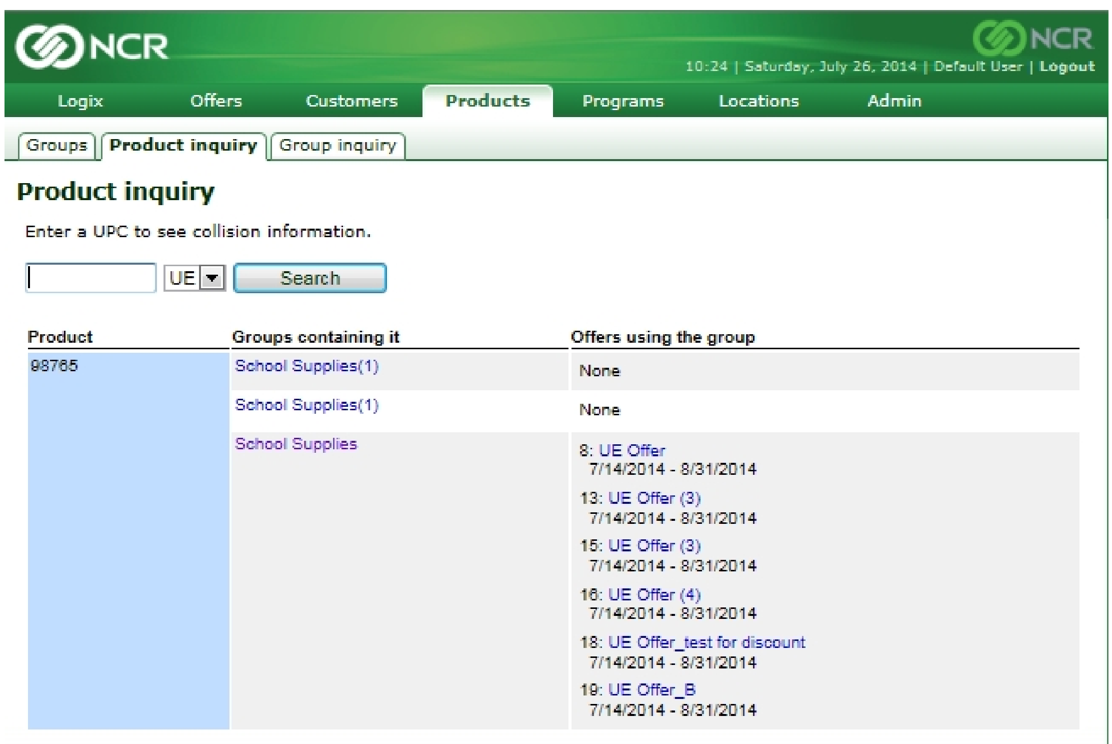


Note: If Logix is installed with multiple promotion engines, they are listed as options in the drop–down list.

2. Enter a unique product ID in the input box.

Note: Universal Product Code (UPC) is a type of Product ID representing individual products.

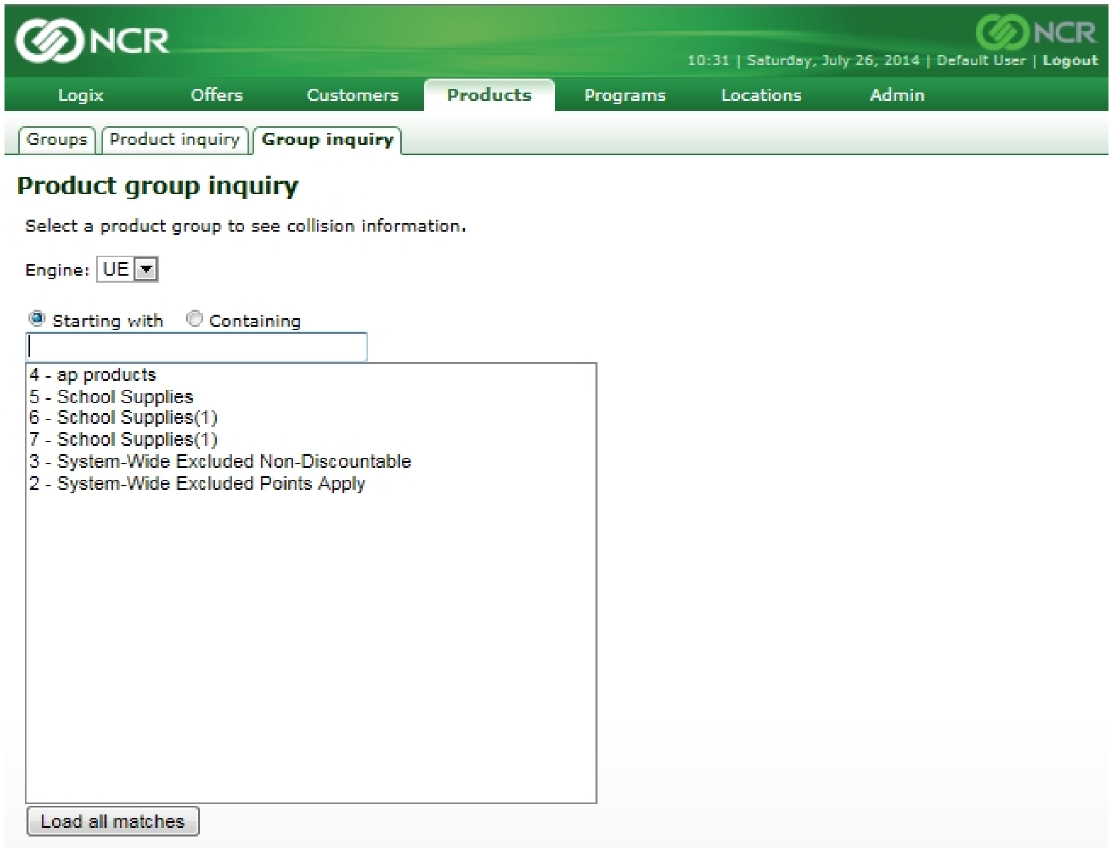
3. Select **Search**. The application displays the corresponding details, as shown in the following example:



Using the Product Group Inquiry Page

To perform a product group inquiry, follow these steps:

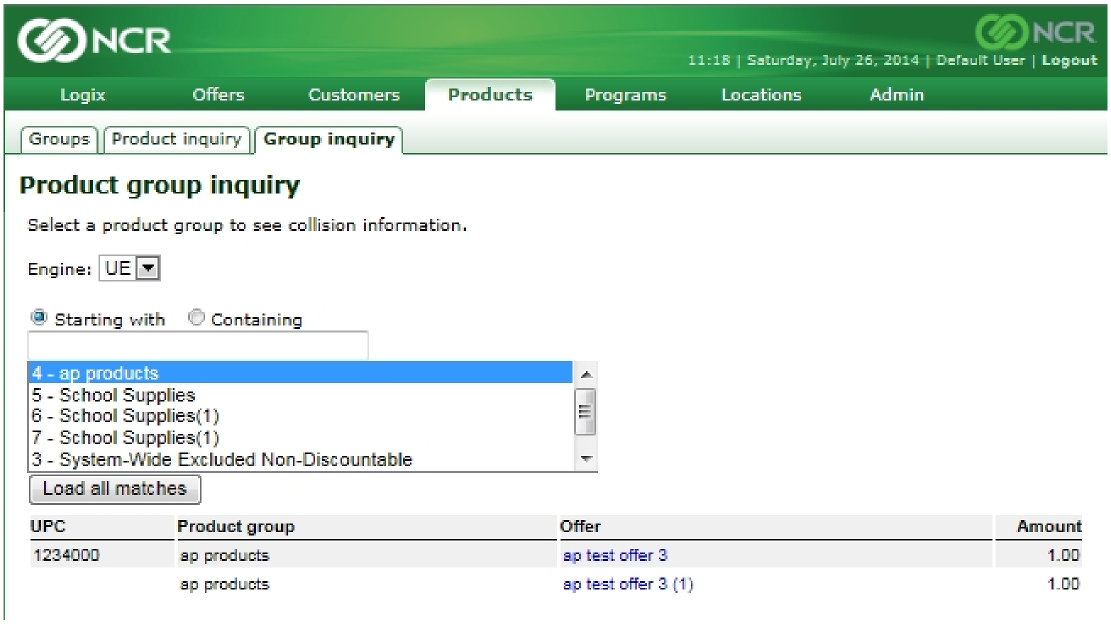
1. From the Products main tab, select the **Group inquiry** page tab. The Product Group Inquiry page is displayed.



Note: If Logix is installed with multiple promotion engines, they are listed as options in the drop–down list.

2. Do any of the following:
   - Select a filter radio button and then, enter the corresponding text in the input field box.
   - Select a product group from the group list box.
3. Select **Load all matches**. If matching product groups exist, the application displays the selected product groups.

4. Select **Load all matches**. If matching product groups exist, the application displays the corresponding item list in the produtc group.



Chapter 7: Defining Program Configuration

Overview

Programs are collections of arbitrary units of currency, like airline miles, cereals points, and so forth. Retailers use programs to encourage a desired behavior by allowing cardholders to accumulate units and then, redeem them for rewards. This chapter describes how to create and manage programs.

Accessing Programs

To access Programs from Logix, select the **Programs** tab. The Points Program page is displayed by default.

Selecting a program page tab displays the corresponding program page:

Program	Description
Points Program	A class of points used for a specific purpose. **Example:** A retailer creates a Fuel Points program to grant points to customers whenever they purchase gasoline, or a Bread Points program to encourage shoppers to visit the bakery.
Stored Value Program	A collection of units that customers can earn and redeem. Each unit is associated with a particular value such as a dollar amount.
Trackable Coupon Program	Limits the number of times a particular coupon can be used within an offer.

Points Programs

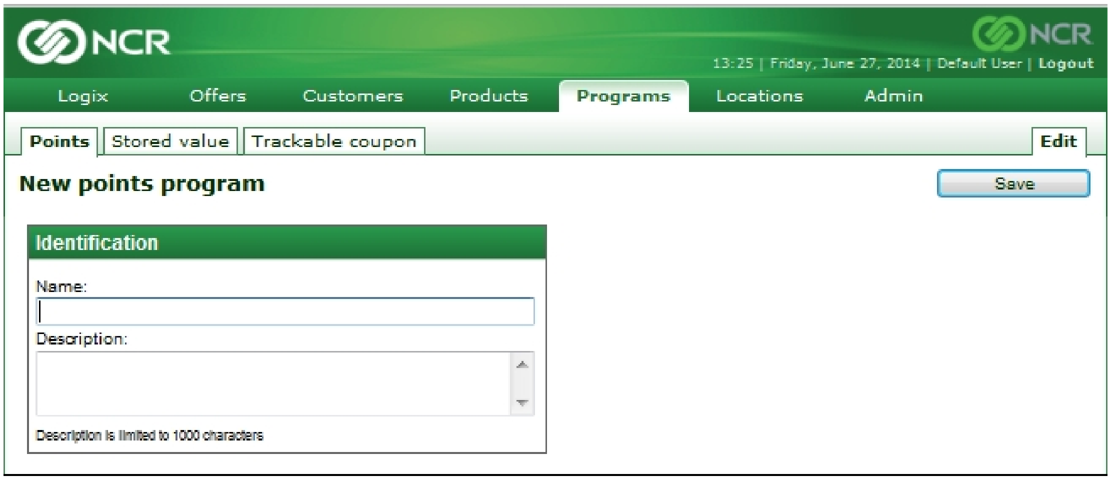
This section describes how to perform the following tasks from the Points Program page:

- Create a Points Program.
- Download Points Balance information.
- Upload Points Balance information.
- Delete a Points Program.
- Track Points Program changes.

Creating Points Programs

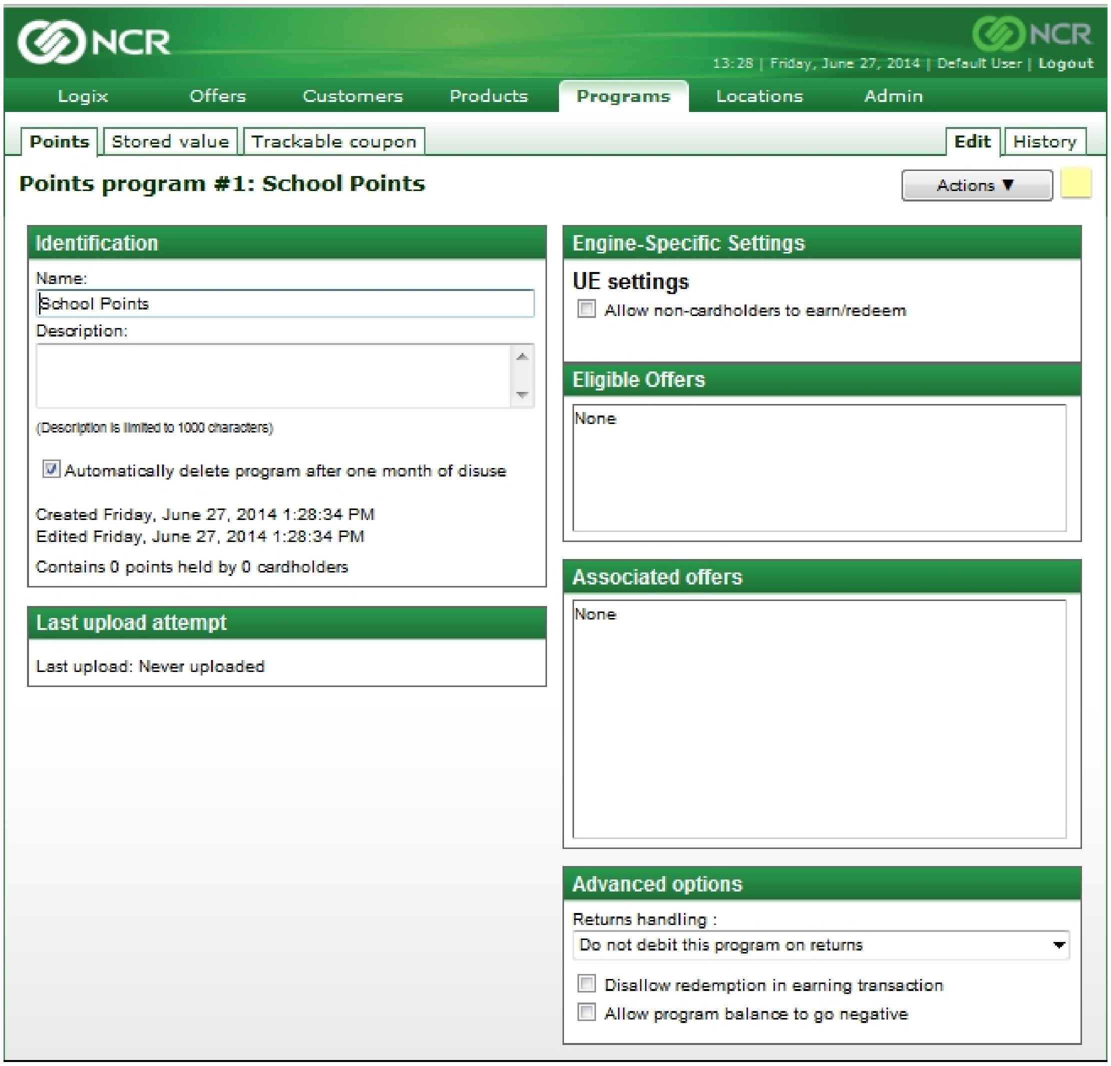
To create a Points Program, follow these steps:

1. From the Points Program page, select **New**. The New Points Program page is displayed.



2. Enter the name and description of the program in the corresponding fields.

3. Select **Save**. The Points Program Edit sub–page is displayed.



4. Use the following table to set parameters in specific sections:

In the section	Do the following:
Identification	Enter the name and description of the points program. **Note:** Selecting the **Automatically delete program after one month of disuse** check box deletes the program after a period of disuse. That is, a period during which the program is not associated with any non–expired offers. **Note:** The period is controlled by the "Auto delete offers after expired for (days)" purging option. For more information, refer to *Configuring Settings* on page 709.
Last upload attempt	This section only indicates the last time a points balance was uploaded to Logix. For more information, refer to *Uploading Points Balance* on page 493.
Engine–Specific Settings	Select the following options, when necessary • **Allow non–cardholders to earn/redeem**—enables the non–cardholder customers to earn or redeem points from this program.
Eligible Offers	Displays a list of opt–in conditions using the program. To configure the program as an eligibility condition, refer to *Setting Eligible Points Program* on page 253.
Associated offers	Displays a list of offers using the program. To configure the program as an offer condition, refer to *Setting Points Conditions* on page 218. To configure the program as an offer reward, refer to *Setting Points Rewards* on page 302.

Advanced options	Select any of the following options:
	• Returns handling options that define whether to return points information to the POS for return handling:
	  • **Do not debit this program on returns**—does not send points message to the POS system for return handling.
	  • **Never calculate quantity on returns**—sends points message to the POS system for return handling.
	• Redemption restriction options that define where the Points Program can be redeemed:
	  • **Disallow redemption in earning transaction**—allows or disallows a user to redeem points in the same transaction that the points were earned.
	  • **Allow program balance to go negative**—allows points to be taken away from the program balance.

In the section	Do the following:
	Example: An example of when a negative value is required is when customer comes back to the store for a return. Customer purchases Item A and received a reward of 100 points. The customer then redeemed the 100 points in another transaction. Customer comes back to the store to return Item A. Because the customer has consumed the 100 reward points, the retailer adjusts the customer's points to a negative 100 value.

5. From the Actions menu, do any of the following:
   - Select **Save** to save a new Points Program configuration or save the changes made to an existing Points Program configuration.
   - Select **Delete** to remove a Points Program configuration.
   - Select **Upload** to upload Points Balance information.
   - Select **Download** to download Points Balance information.
   - Select **New** to create a Points Program.
6. Define the program configuration by doing any of the following:
   - Configure the program as an offer condition. For more information, refer to *Setting Points Conditions* on page 218.
   - Configure the program as an offer reward. For more information, refer to *Setting Points Rewards* on page 302.

Downloading Points Balance

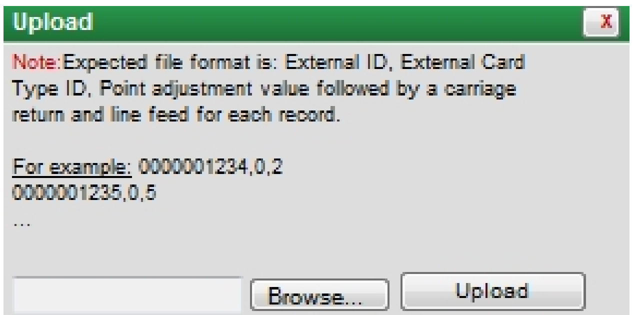
To download points balance information, follow these steps:

1. From the Points Program page, select a program name. The application displays the corresponding Point Program Configuration sub–page.
2. From the Actions menu, select **Download**. The application downloads a spreadsheet (`.csv`) of the points balances held by individual customers.

Uploading Points Balance

To upload points balance information, follow these steps:

1. From the Points Program page, select a program name. The application displays the corresponding Points Program Configuration sub–page.
2. From the Actions menu, select **Upload**. A pop–up window is displayed.



3. Select **Browse**. A file directory window is displayed.
4. Select a `.csv` file and then, select **Upload**.

Deleting Points Programs

To delete a points program, follow these steps:

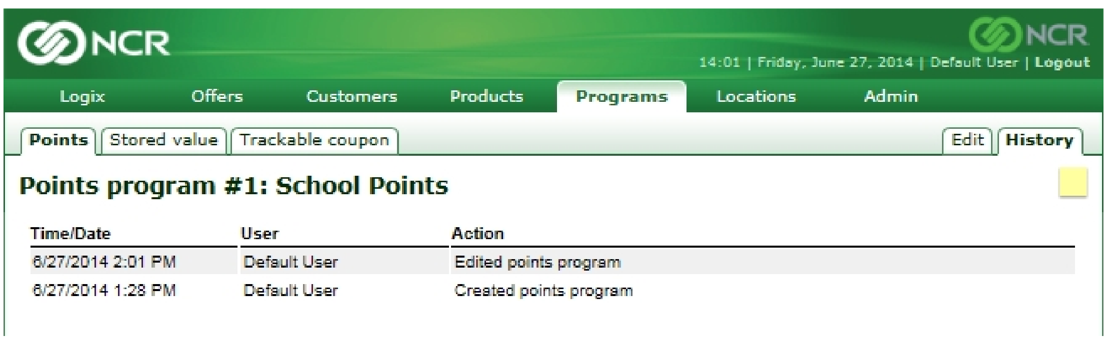
Note: Points programs associated with offers cannot be deleted.

1. From the Points Program page, select a program name. The corresponding Points Program Configuration sub–page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**.

Tracking Points Program Changes

To view the history details of a points program, follow these steps:

1. From the Points Program page, select a program. The corresponding Points Program Configuration sub–page is displayed.
2. Select the **History** sub–page tab. The following example shows the History sub–page of a points program.



Note: Select the **Notes** icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Stored Value Programs

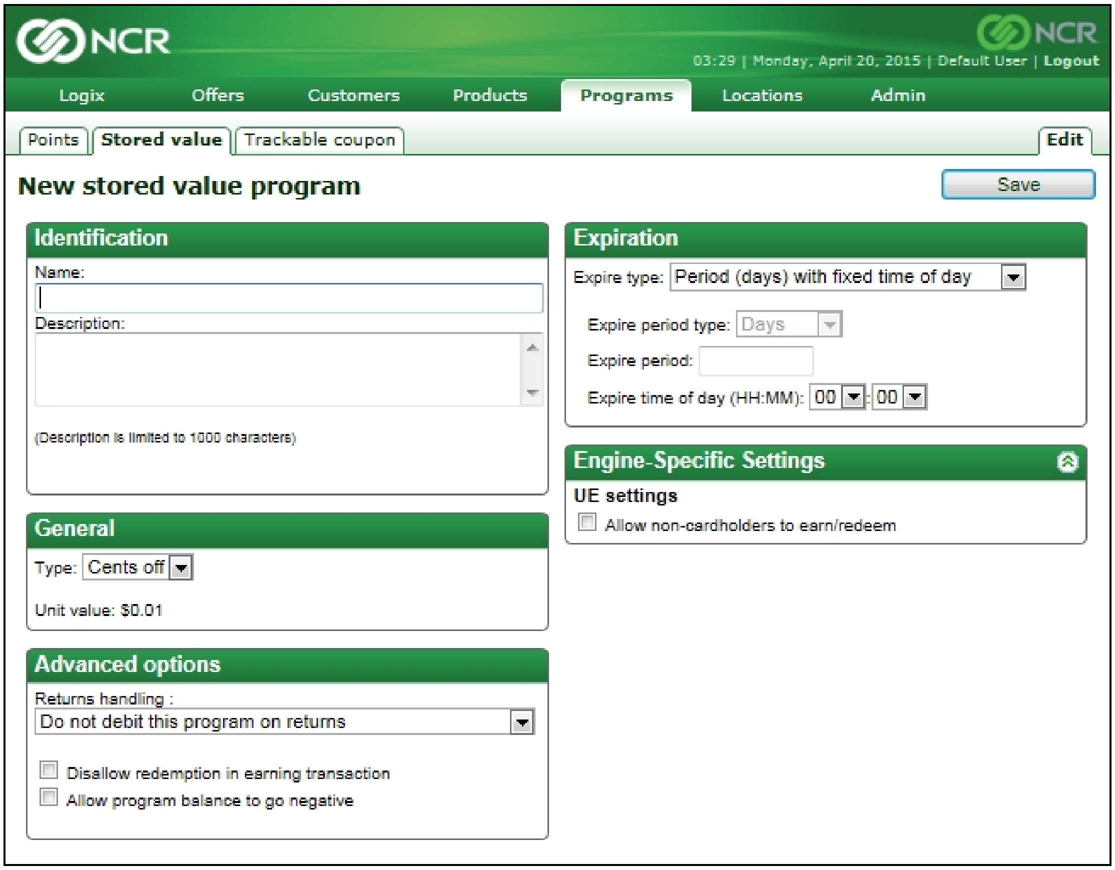
A stored value program is a collection of units that customers can earn and redeem. Each unit is associated with a particular value such as a dollar amount. This section describes how to perform the following tasks from the Stored Value Program page:

- Create a Stored Value Program
- Delete Stored Value Program
- Track Stored Value Program changes

Creating Stored Value Programs

To create a Stored Value Program, follow these steps:

1. From the Stored Value Program page, select **New**. The application displays a new Stored Value Program Edit page.



2. Use the following table to set parameters in specific sections:

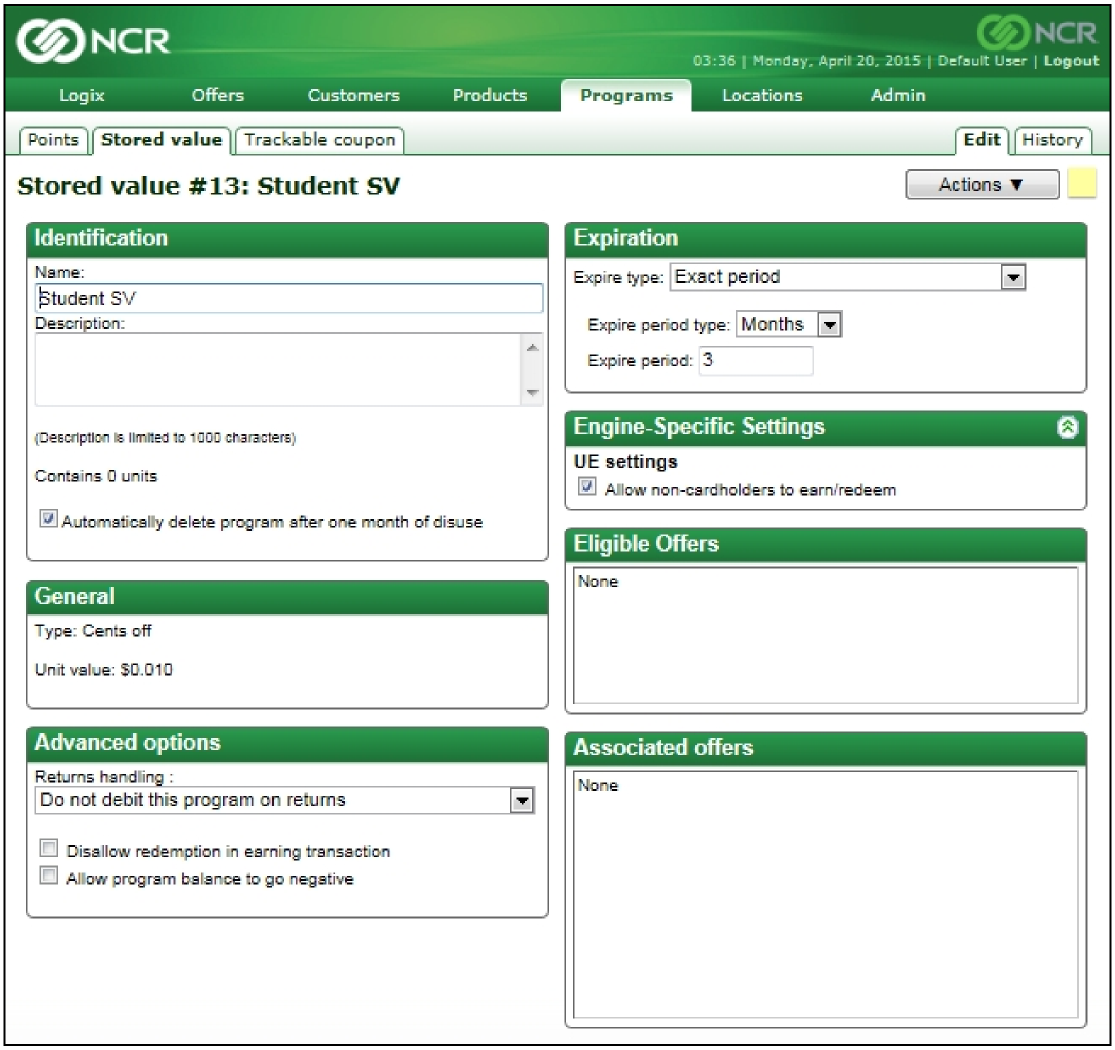
In the section	Do the following:
Identification	Enter the name and description of the stored value program.
General	Set the type of stored value that the program represents using any of the following: • **Points**—enter a unit value that each unit of stored value represents. Retailers use points when they want to reward certain number of points and give away rewards based on their accumulations. **Example:** A customer has accumulated 100 points from previous transactions. At the store, 100 points is worth $10. Customers may redeem $10 using the points. • **Cents off**—sets a limit on the unit value. Retailers use the Cents off type of stored value when they want the customers to accumulate in terms of money. **Example:** A retailer rewards 2 cents of stored value for every dollar spent in a transaction, and when the accumulated amount is worth $5, the customer may start redeeming the amount. The General section also displays the **Unit value** of the stored values. If the stored value type selected is Cents off, the following are the possible unit values. These values also determine the precision level of the unit value: • **$0.100**—supports one decimal value • **$0.010**—supports two decimal values • **$0.001**—supports three decimal values **Note:** The Unit value is defined in the LogixRT database. To modify the unit value, contact an NCR Professional Services Representative.

Advanced Options	Select any of the following options:
	• Returns handling options that define whether to return stored value information to the POS for return handling:
	  • **Do not debit this program on returns**—does not send the stored value message to the POS system for return handling.
	  • **Never calculate quantity on returns**—sends the stored value message to the POS system for return handling.
	• Redemption restriction options that define where the Stored Value Program can be redeemed:

In the section	Do the following:
	• **Disallow redemption in earning transaction**—allows or disallows a user to redeem stored values in the same transaction that they were earned. • **Allow program balance to go negative**—allows stored values to be taken away from the program balance. **Example:** An example of when a negative value is required is when customer comes back to the store for a return. Customer purchases Item A and received a reward of 100 stored value points. The customer then redeemed the 100 points in another transaction. Customer comes back to the store to return Item A. Because the customer has consumed the 100 stored value reward points, the retailer adjusts the customer's points to a negative 100 value.
Expiration	Set the date after which stored value balances can expire using any of the following expiration types: • **Fixed date/time**—set the expiration to the particular date and time you input. **Example:** Time=17:30; Date=May 31, 2016 • **Period (days) with fixed time of day**—sets the expiration to occur at a specific time of day after a certain number of days. **Example:** Period=10 days; Time=17:30 • **Exact period**—sets the expiration to occur exactly X days, hours, or months from the time the stored value was earned. **Example:** 2 months • **Expire X days after earn offer ends**—sets the expiration to occur exactly on the given number of days after the associated offer ends. **Example:** 30 days after the associated offer ends • **Expire X months after end of current month**—sets the expiration to occur on the last day of the given future month. **Example:** 3 months after the current month **Note:** Ensure that the expiration period is specified in order to save the program.
Engine–Specific Settings	Select the following options if necessary:

In the section	Do the following:
	• **Allow non-cardholders to earn/redeem**—indicates whether non–cardholders can redeem stored values within a transaction. Once the transaction has completed, the points are discarded. **Note:** If the *Allow non-cardholders to earn/redeem* flag cannot be disabled, check if the stored value program is associated with an offer. If it is, remove the program from the offer and then disable the flag. If the *Allow non-cardholders to earn/redeem* flag is enabled, ensure that the *Add shadow member to transaction* option is also enabled to avoid any customer related errors in your transaction. For more information, contact an NCR Customer Representative.

3. Select **Save**. The following window is displayed.



4. Define the program configuration by doing any of the following:
   - Configure the program as an eligibility condition. For more information, refer to *Setting Eligible Stored Value Program* on page 256.
   - Configure the program as an offer condition. For more information, refer to *Setting Stored Value Conditions* on page 241.
   - Configure the program as an offer reward. For more information, refer to *Setting Stored Value Rewards* on page 305.
5. From the Actions drop–down menu, do any of the following:
   - Select **Save** to save a new Stored Value Program configuration or save the changes made to an existing Stored Value Program configuration.
   - Select **Delete** to remove a Stored Value Program configuration.
   - Select **New** to create a Stored Value Program.

Deleting Stored Value Programs

To delete a stored value program, follow these steps:

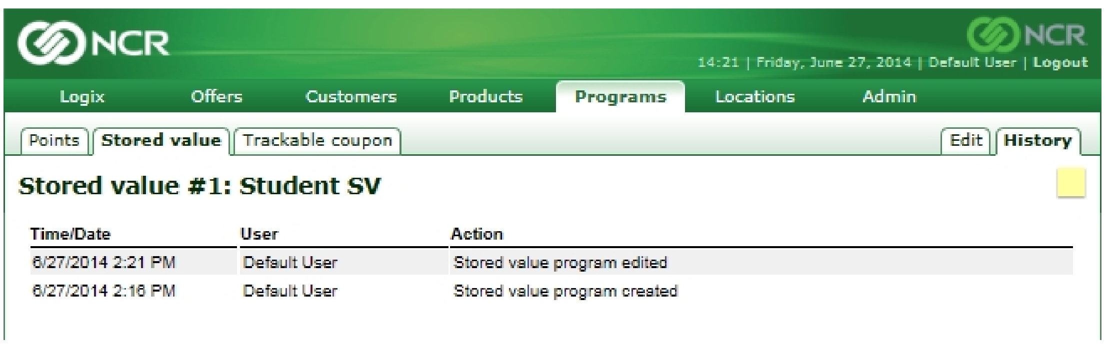
Note: Stored Value Programs associated with offers cannot be deleted.

1. From the Stored Value Program page, select a program name. The corresponding Stored Value Program Configuration sub–page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**.

Tracking Stored Value Program Changes

To view the history details of a Stored Value Program, follow these steps:

1. From the Stored Value Program page, select a program. The corresponding Stored Value Program Configuration sub–page is displayed.
2. Select the **History** sub–page tab. The following example shows the History sub–page of a Stored Value Program.



Note: Select the **Notes** icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Trackable Coupon Programs

Trackable Coupon Programs can only be populated with coupons by externally uploading coupons to a flat file with a `.tcp` extension. For servers other than English, the text file should be imported with ANSI encoding. This file is processed by the Trackable Coupons Processing agent at a configurable interval. Once the file has been processed, all coupons located within the file are imported into the specified program. For more information, refer to *Core Agents* on page 790.

Note: To upload coupon files, contact the system administrator or an NCR Professional Services Consultant.

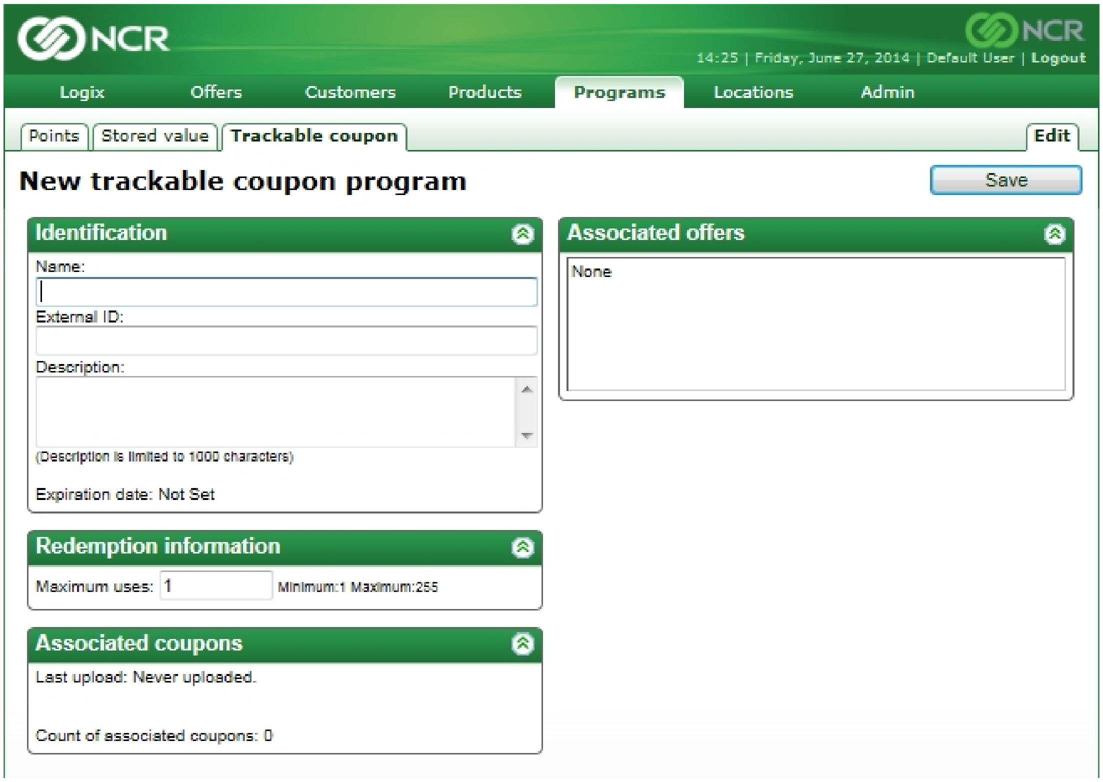
This section describes how to perform the following tasks from the Trackable Coupon Program page:

- Create a Trackable Coupon Program
- Delete Trackable Coupon Program configuration
- Track Trackable Coupon Program changes

Creating Trackable Coupon Programs

To create a Trackable Coupon Program, follow these steps:

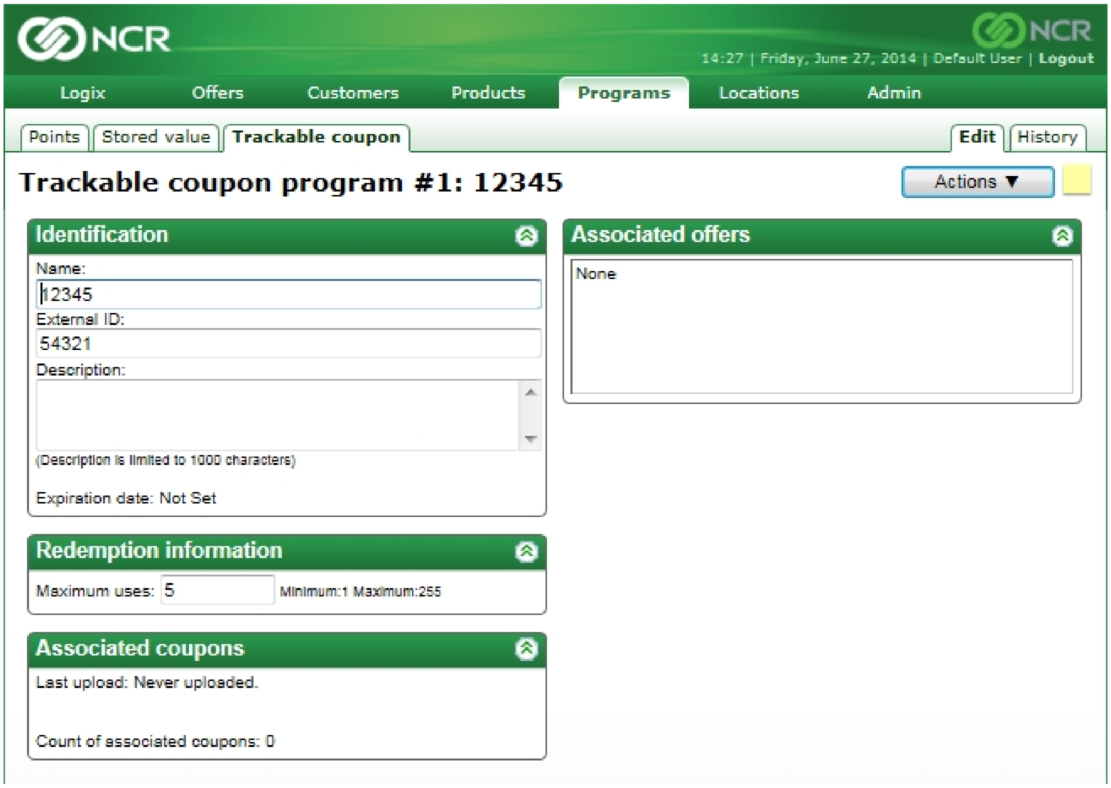
1. From the Trackable Coupon Program page, select **New**. The application displays a new Trackable Coupon Program Configuration page.



2. Use the following table to set parameters in specific sections:

In the section	Do the following:
Identification	Enter the name and description of the trackable coupon program.
Redemption Information	Enter the maximum number of times the coupons associated with the program can be redeemed.
Associated coupons	To associate coupons with the program, ensure that the corresponding coupon file exists in the server. To upload coupon files, contact the system administrator or an NCR Professional Services Consultant. **Note:** Ensure that the coupon file uploaded in the server is using the same filename as the External ID.
Associated offers	Configure the program as an offer condition. For more information, refer to *Setting Trackable Coupon Conditions* on page 245.

3. Select **Save**. The following window is displayed:



4. From the Actions drop–down menu, do any of the following:
   - Select **Save** to save a new Trackable Coupon Program or save the changes made to an existing program .
   - Select **Delete** to remove a Trackable Coupon Program.
   - Select **New** to create a Trackable Coupon Program.

Deleting Trackable Coupon Programs

To delete a trackable coupon program, follow these steps:

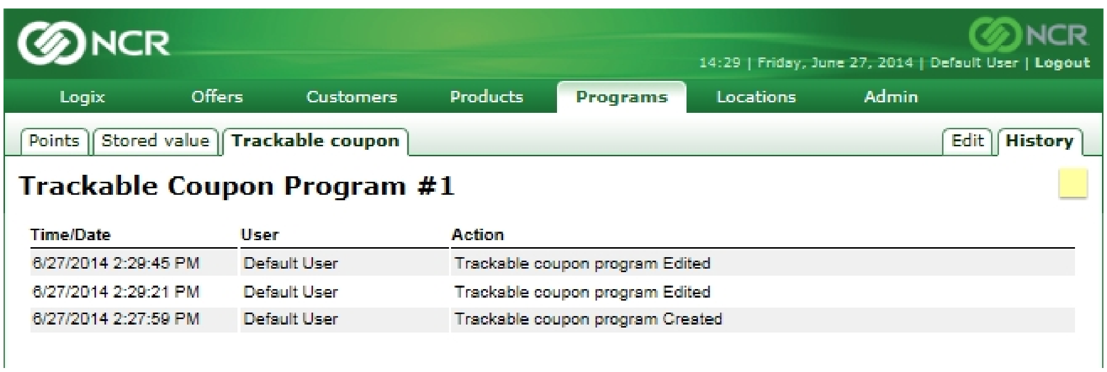
Note: Trackable coupon programs associated with offers cannot be deleted.

1. From the Trackable Coupon Program page, select a program name. The corresponding Trackable Coupon Program Configuration sub–page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**.

Tracking Trackable Coupon Program Changes

To view the history details of a Trackable Coupon Program, follow these steps:

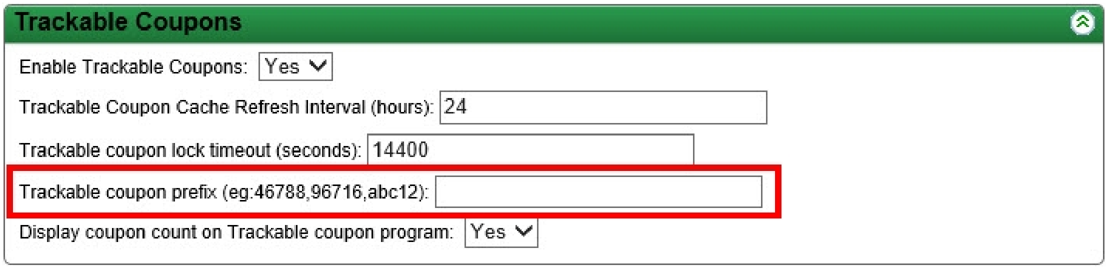
1. From the Trackable Coupon Program page, select a program name. The corresponding Trackable Coupon Program Configuration sub–page is displayed.
2. Select the **History** sub–page tab. The History sub–page of a Trackable Coupon Program is displayed, as shown in the following example:



Note: Select the **Notes** icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Setting the Trackable Coupon Prefix

The Trackable Coupon prefix is used to differentiate trackable coupons from trigger codes. This prefix is set in the engine settings. To set the prefix, go to **Admin→Configuration→Settings: UE→Trackable Coupons**.



Note: This setting may contain multiple prefixes that are separated by commas.

If the prefix is defined in this option and a coupon code in a transaction matches the prefix, the system considers it as a trackable coupon; however, if the coupon code does not match the prefix, the system considers it as a trigger code.

If there is no prefix set in this option, the system considers the coupon code as a trackable coupon only if its length is <u>not equal</u> to 16 characters. If the coupon code has 16 characters, it is considered as a trigger code.

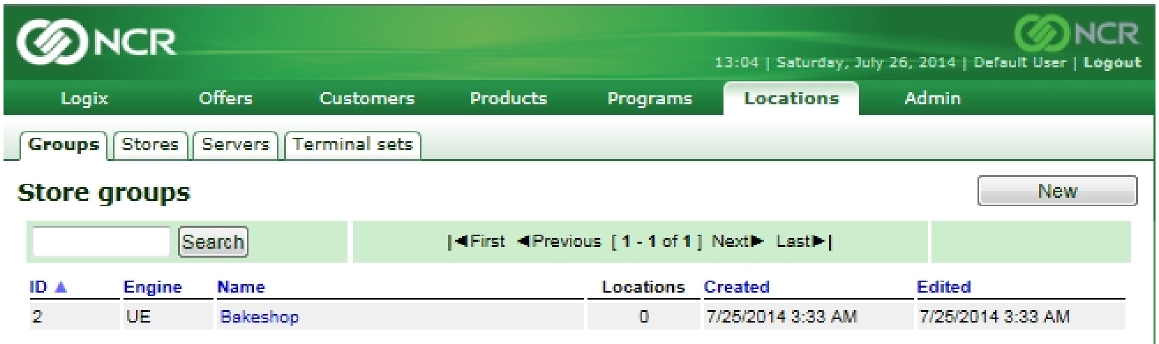
Chapter 8: Configuring Offer Locations

Overview

Locations allow retailers to define and maintain store details where offers are delivered. Information in this chapter assumes that the Logix application is configured to operate either at the store or enterprise level. This chapter describes the procedures in defining and maintaining store locations.

Accessing Offer Locations

Selecting the **Locations** tab displays the Store Groups page by default.

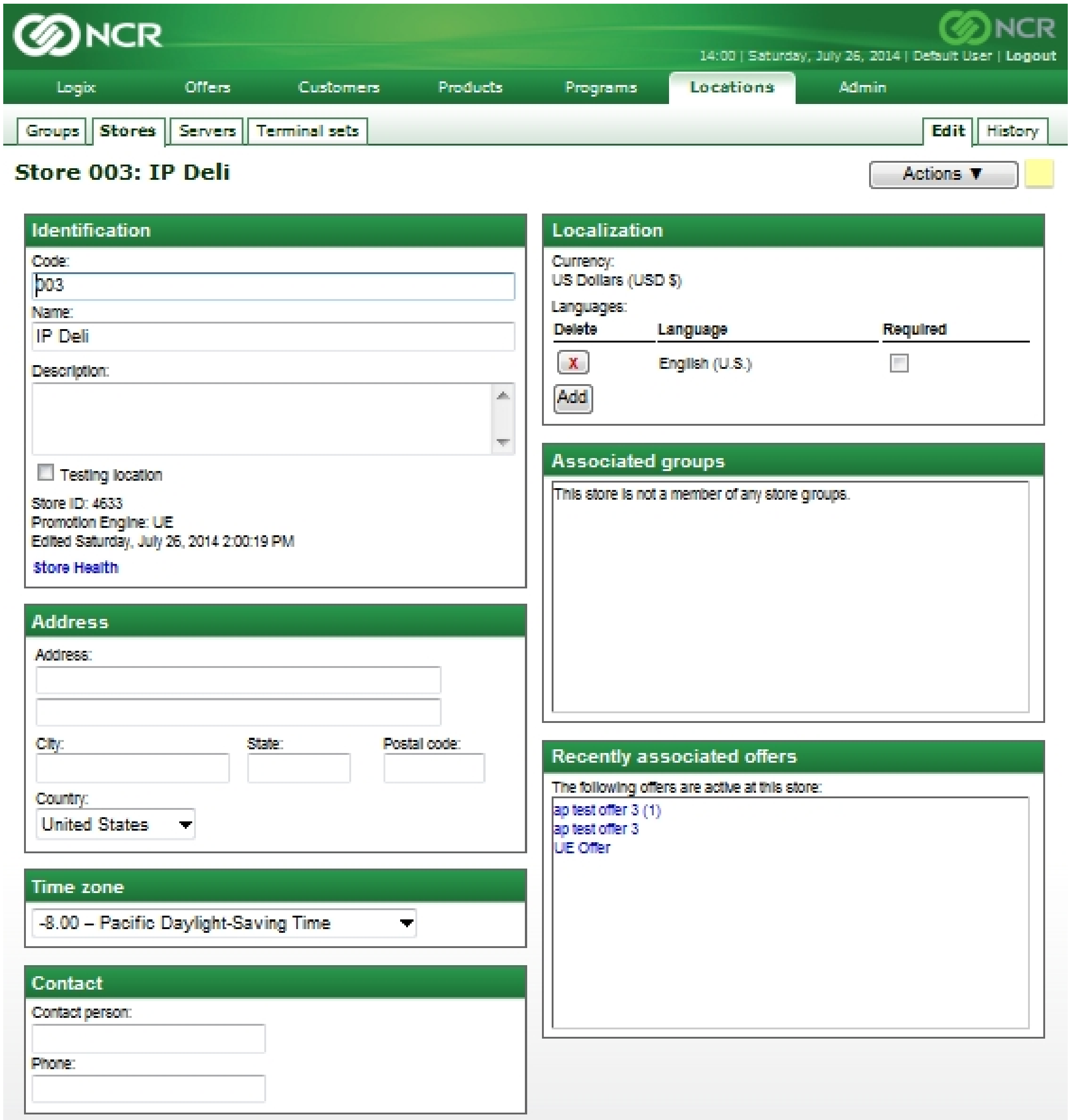


The Locations tab displays the following set of pages:

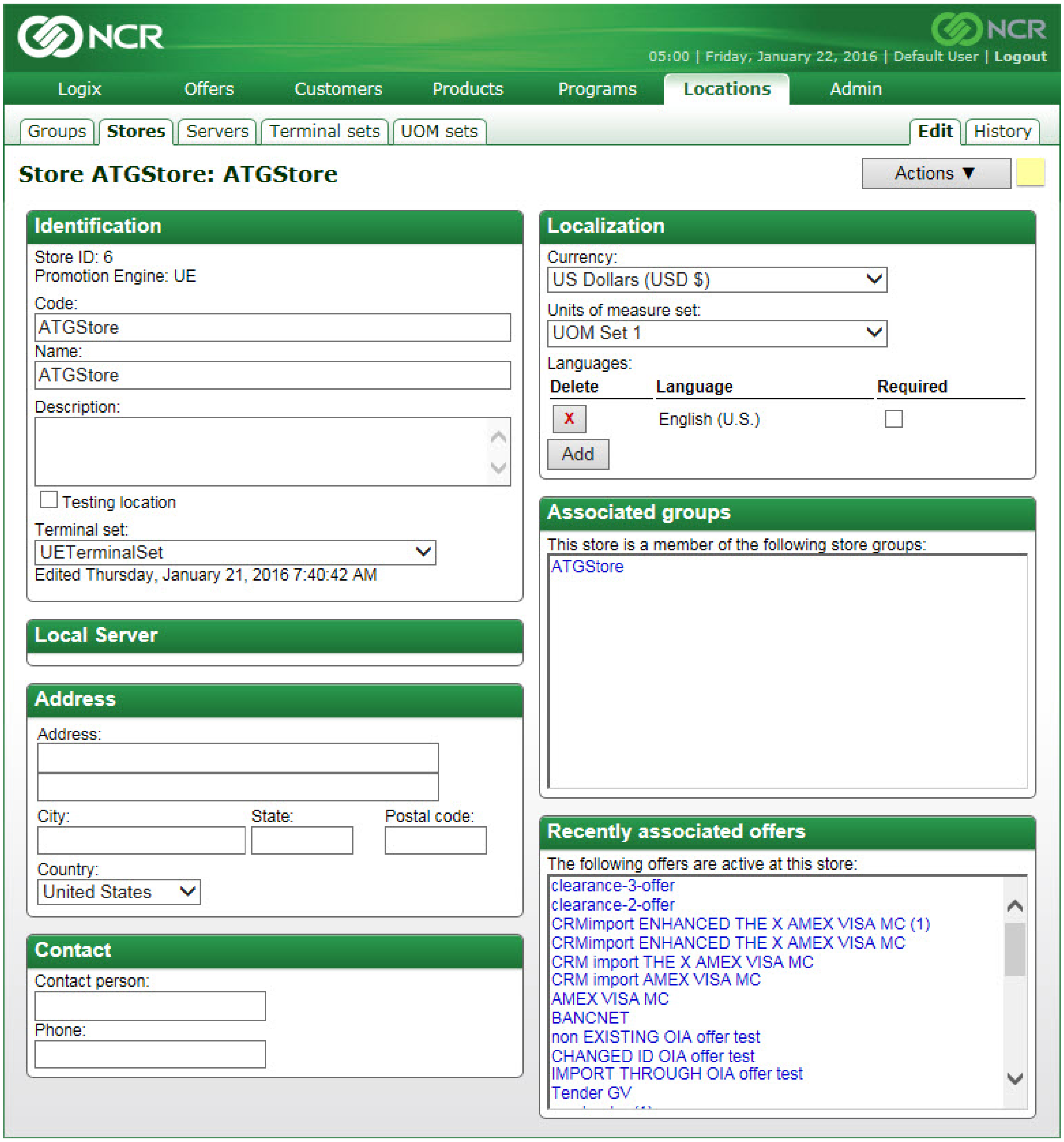
Location Tab	Description
Groups	Displays details of store groups.
Stores	A store is any facility where offers may be delivered. **Note:** In addition to retail locations, the term is also used to refer to non–retail facilities such as test labs.
Servers	Similar to stores, but operates at the enterprise level and may service multiple retail locations.
Terminal Sets	Permits users to create and maintain a group of terminals.
UOM Sets	Permits users to create and maintain Unit of Measure (UOM) sets. **Note:** This sub–page is available only if the *Enable multi unit of measure for UE* setting is set to enabled. For more information, refer to *Configuring the UOM setting* on page 188.

Accessing Store Configuration

Selecting a store name from the Stores page displays the corresponding store configuration page as shown in the following example:



If the multi unit of measure setting is enabled in the system, the store configuration page is displayed as shown in this example:



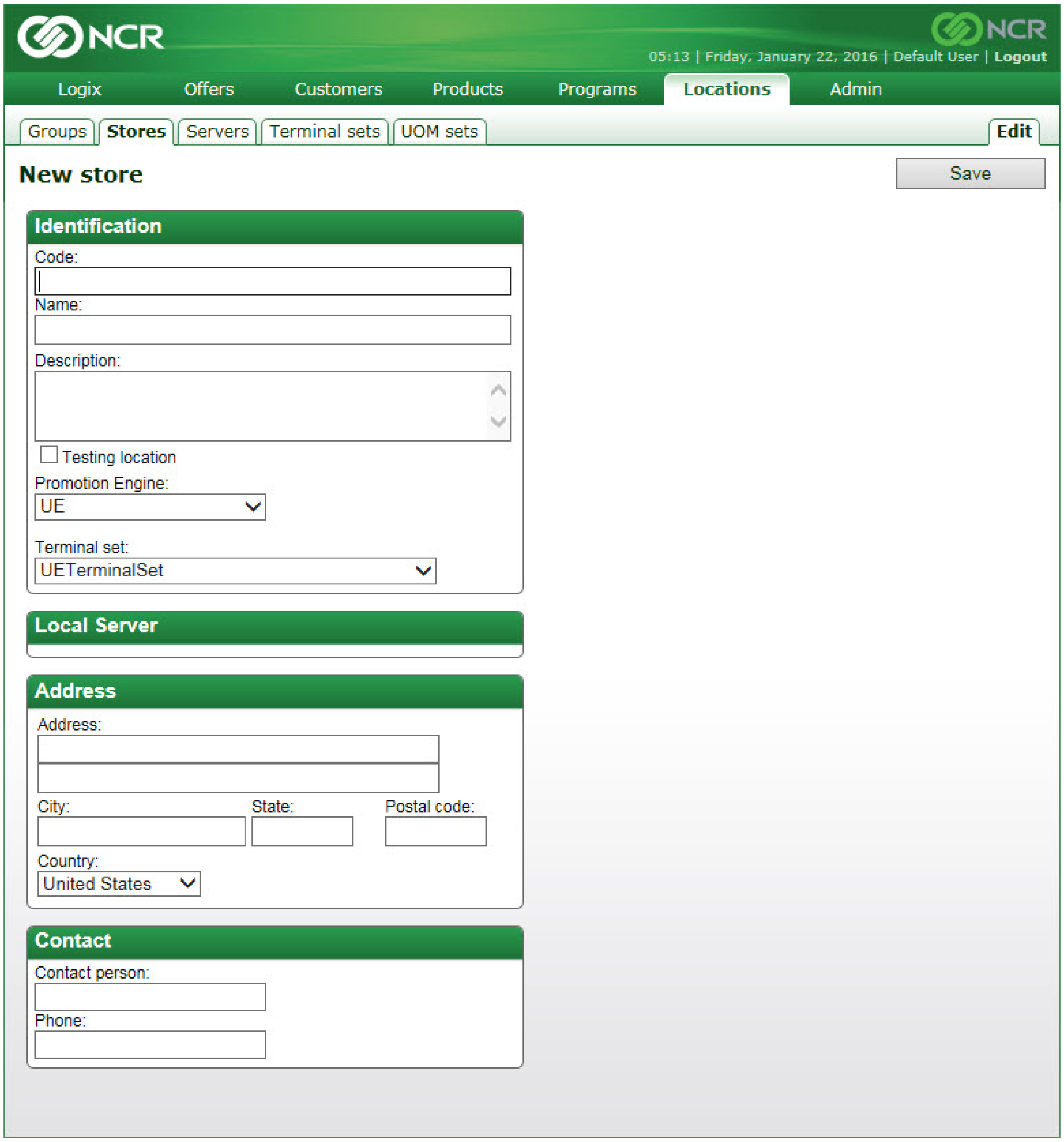
The Store Configuration page displays the following sections:

Section	Details
Identification	• **Store ID**–the store's ID. • **Promotion Engine**–the promotion engine used by the store. • **Code**—the value assigned by the retailer to the store. • **Name**—name of the store. • **Description**—describes the store. • **Testing location**—if selected, the store is used for test labs and other such facilities. **Note:** Testing locations are indicated parenthetically in the stores list. • **Store Health**—links to the associated Store Health page in the Admin tab. The Store Health page provides detailed server– and performance–related information about each store. • **Terminal set**–the terminal set associated with the store.
Local Server	Details of the store's local server.
Address	Details of the store's physical location.
Time zone	Indicates the time zone in which the store is located.
Contact	Details of the store personnel usually the store manager.
Localization	• **Currency**—sets the currency used in the store. • **Units of measure set**—sets the unit of measure (UOM) set for the store. • **Language**—sets the language used in each store.
Associated groups	Displays the groups in which the store is a member. For more information, refer to *Associating Stores with Store Groups* on page 529.
Recently Associated offers	Displays the offers that are used by the store. **Note:** Only stores that belong to a store group can be associated with offers. For more information, refer to *Associating Offers with Store Groups* on page 527.

Creating Stores

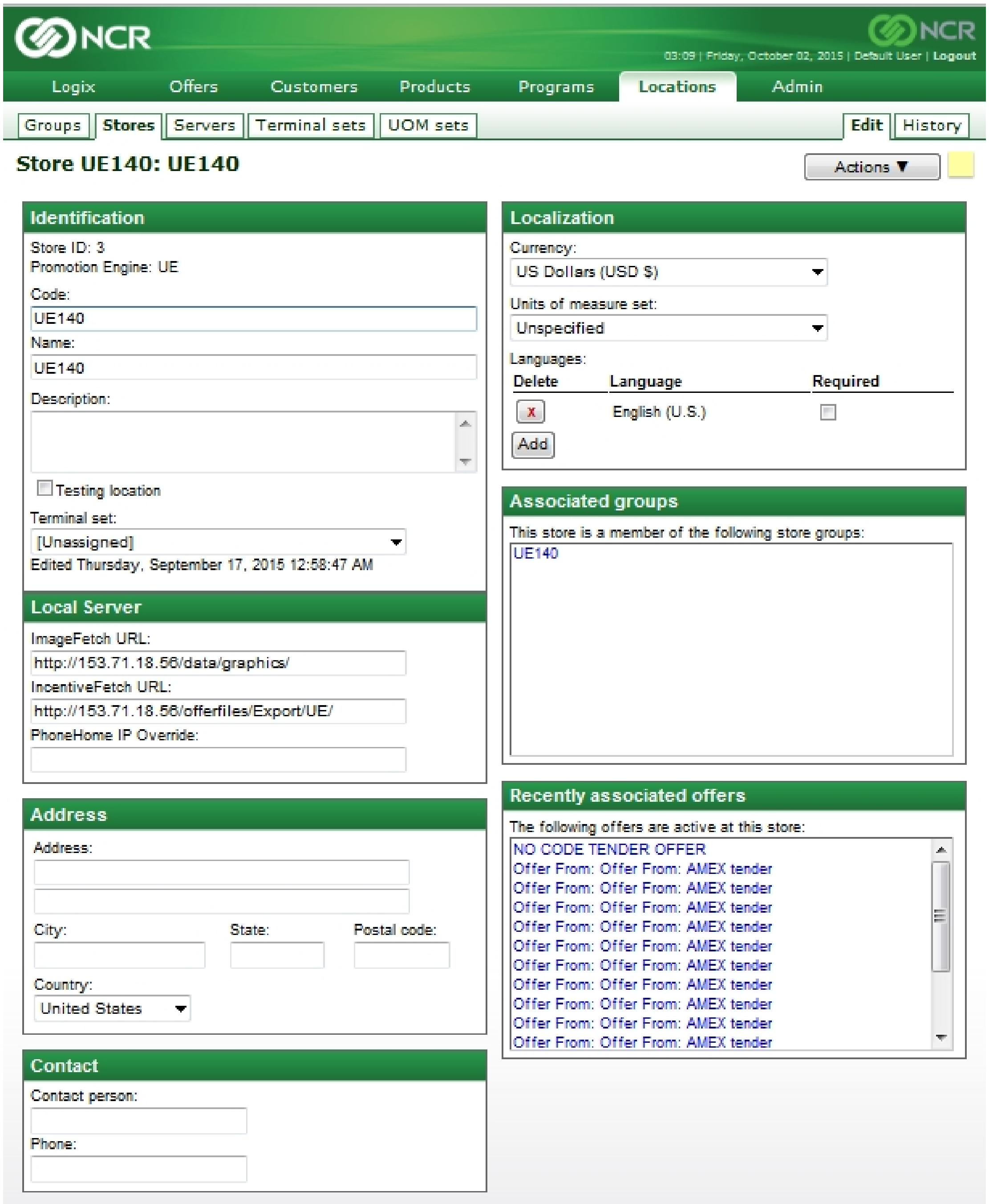
To create a new store, follow these steps:

1. From the Stores page, select **New**. The New store page is displayed.



2. Enter the store details in the corresponding fields.

3. Select **Save**. The application displays the corresponding store configuration page.



4. Define the store configuration by doing the following:

   - Configure Localization settings. For more information, refer to *Configuring Store Localization Settings* on page 517.
   - Associate the store with a terminal set. For more information, refer to *Associating Stores with Terminal Sets* on page 520.

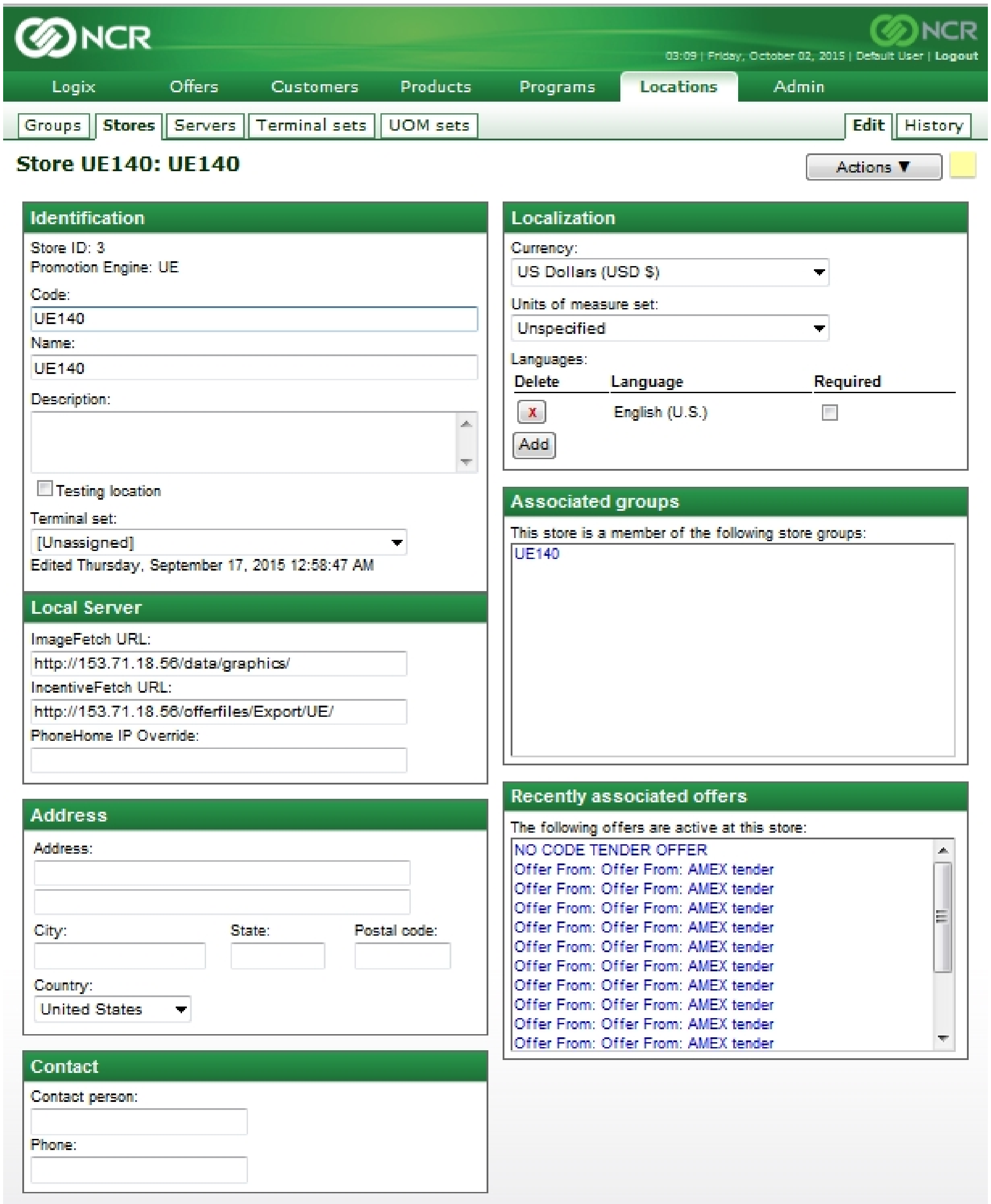
- Associate the store with a store group. For more information, refer to *Associating Stores with Store Groups* on page 529.

Note: Only stores that belong to a store group can be associated with offers.

Configuring Store Localization Settings

To modify a store's localization settings, follow these steps:

1. From the Stores page, select a store name. The corresponding store configuration page is displayed.

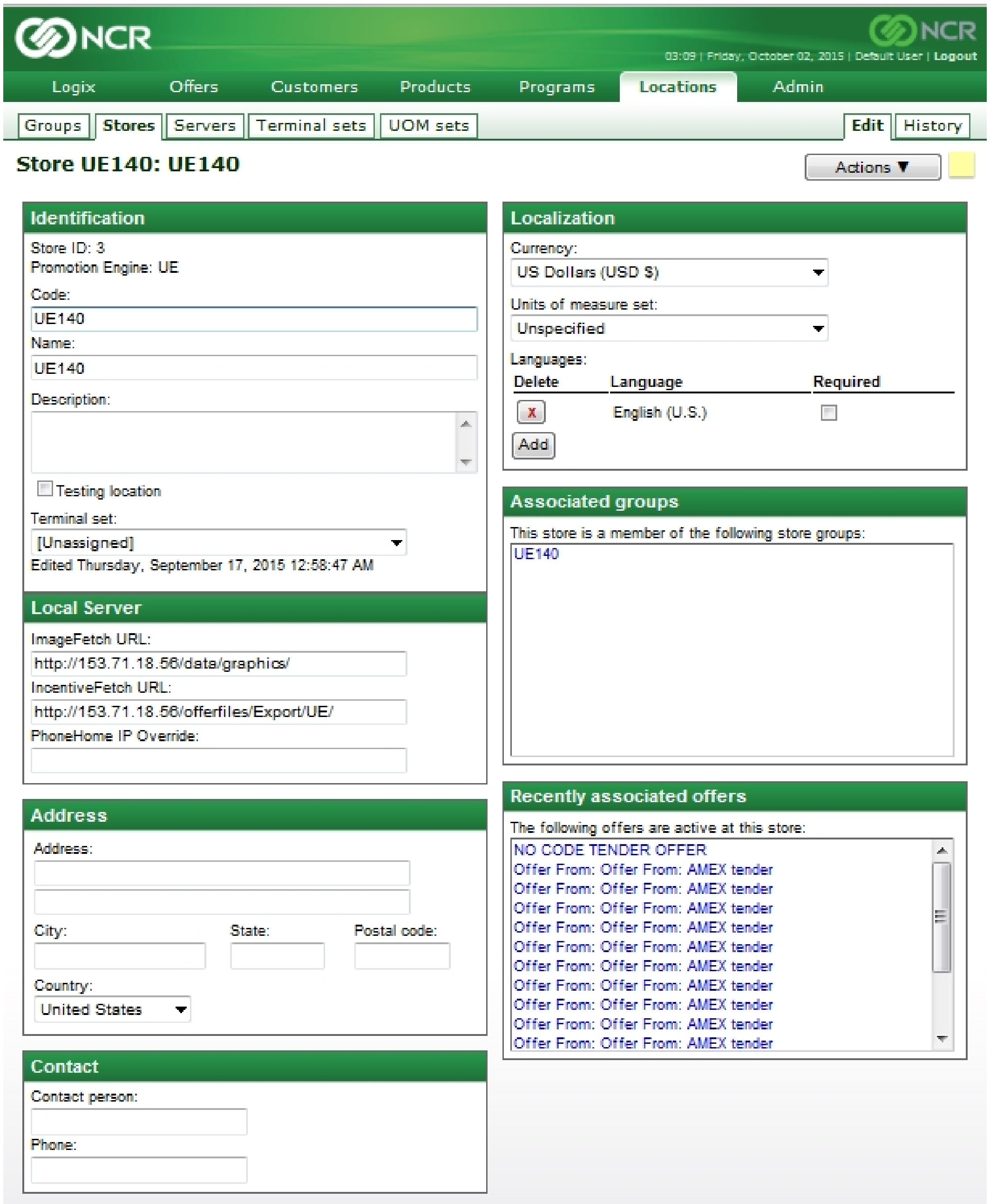


2. In the Localization section, do any of the following:
   - To add a currency, select a currency from the Currency drop–down list. By default, the default currency is displayed instead of a drop–down list. The drop–down list is displayed only if the *Enable multi currency for UE* setting is enabled in the Localization Options. For more information, refer to *Localization Options* on page 737.
   - To associate the store with a UOM set, select a UOM set from the Units of measure set drop–down list. For more information, refer to *Associating Stores with UOM Sets* on the facing page. By default, the Units of measure set drop–down list is not displayed. It is displayed only if the *Enable multi unit of measure* setting is enabled in the Localization Options. For more information, refer to *Localization Options* on page 737.
   - To add a language, select **Add**. The language is added to the identification section in the Offer Configuration sub–page.
3. From the Actions menu, select **Save**.

Associating Stores with UOM Sets

To associate a store with a UOM set, follow these steps:

1. From the Stores page, select a store name. The corresponding Store Configuration page is displayed.



2. From the Units of measure set drop–down list in the Localization section, select a UOM set.

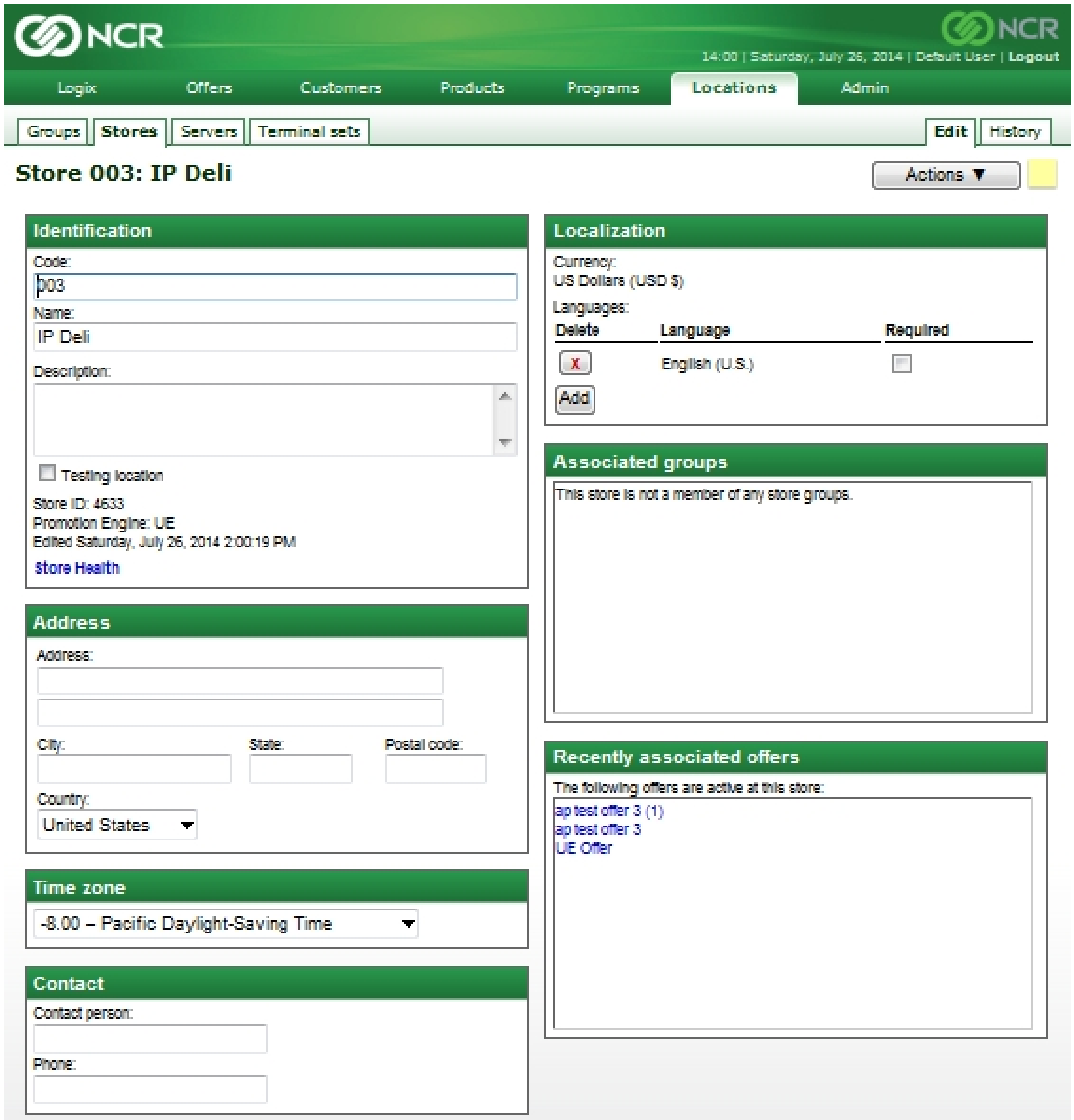
Note: To create UOM sets, refer to *Creating UOM Sets* on page 551.

3. From the Actions menu, select **Save**.

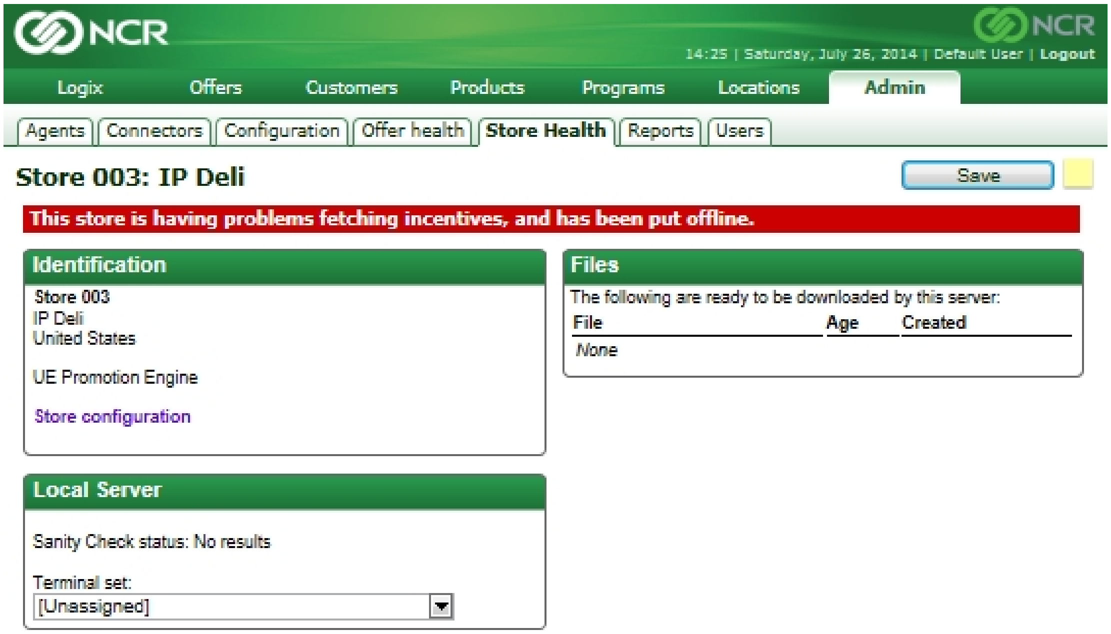
Associating Stores with Terminal Sets

To associate a store with a terminal set, follow these steps:

1. From the Stores page, select a store name. The corresponding Store Configuration page is displayed.



2. Select the **Store Health** link in the Identification section. The corresponding Store Health page is displayed.



3. From the Terminal set drop–down list in the Local Server section, select a terminal set.

Note: To create terminal sets, refer to *Creating Terminal Sets* on page 546.

4. Select **Save**.

Deleting Stores

To delete a store, follow these steps:

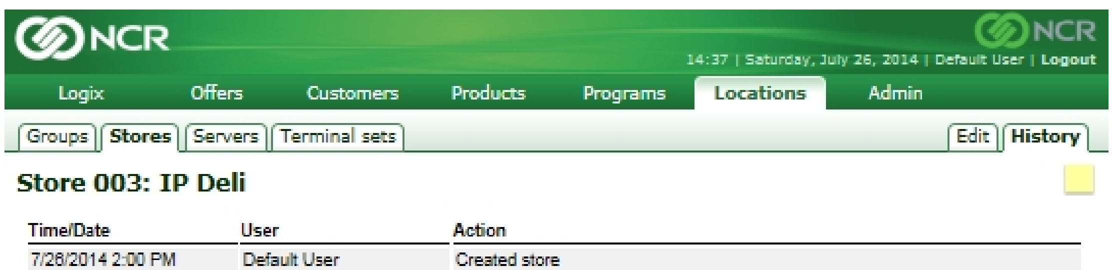
Note: Stores associated with offers cannot be deleted.

1. From the Stores page, select a store name. The corresponding store configuration page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**. The store is deleted from the Stores page.

Tracking Store Location Changes

Logix allows users to track changes made to stores, who made the changes, and when the changes were applied. These changes are recorded and displayed chronologically in the Store History sub–page. To view the history details of a store, follow these steps:

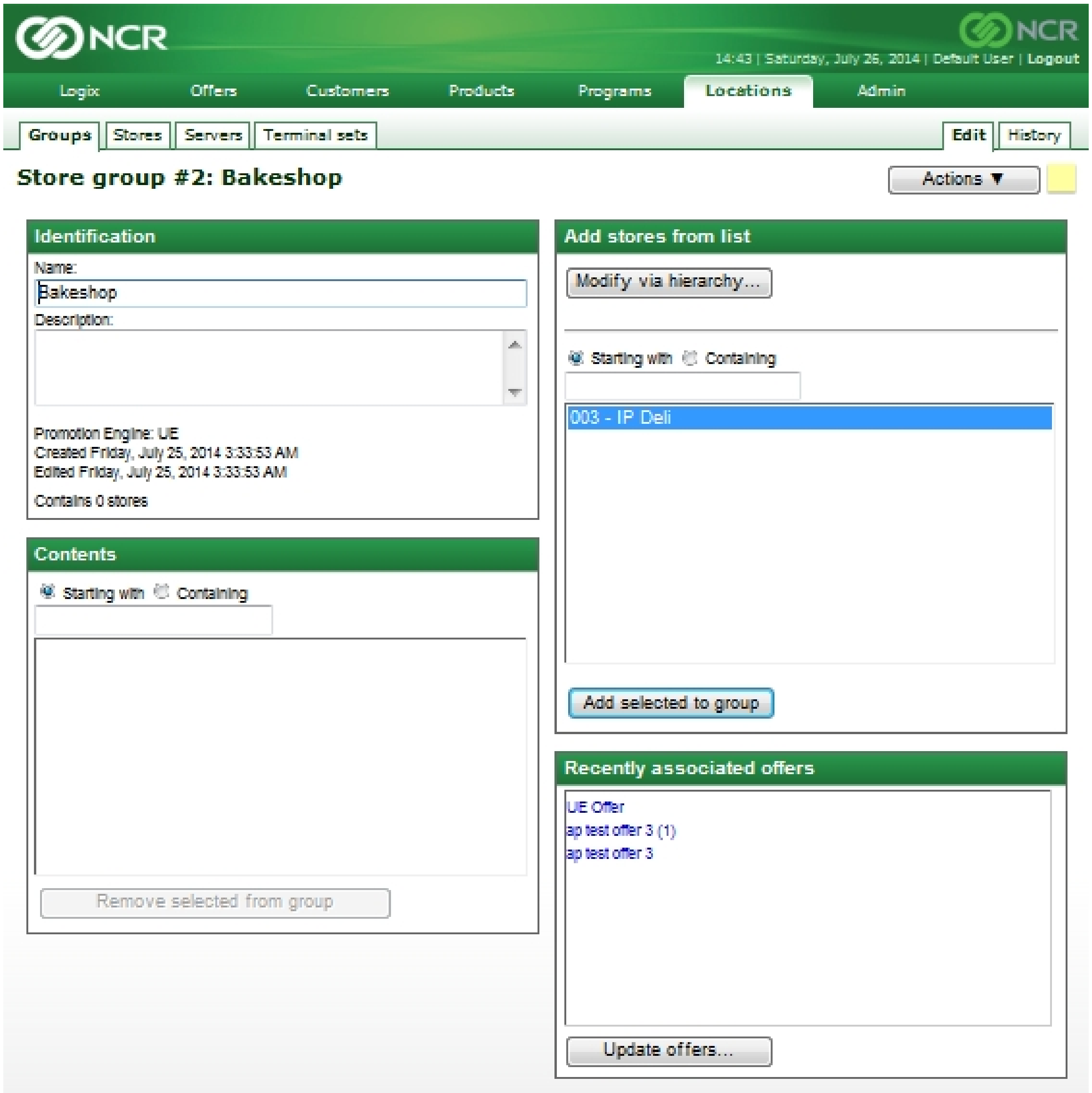
1. From the Stores page, select a store name. The corresponding Store Edit sub–page is displayed.
2. Select the **History** sub–page tab. The application displays the changes made to the store.



Note: Select the Notes icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Accessing Store Group Configuration

Selecting a store group name from the Store Groups page displays the corresponding store group configuration page as shown in the following example:



The Store Group Configuration page displays the following sections:

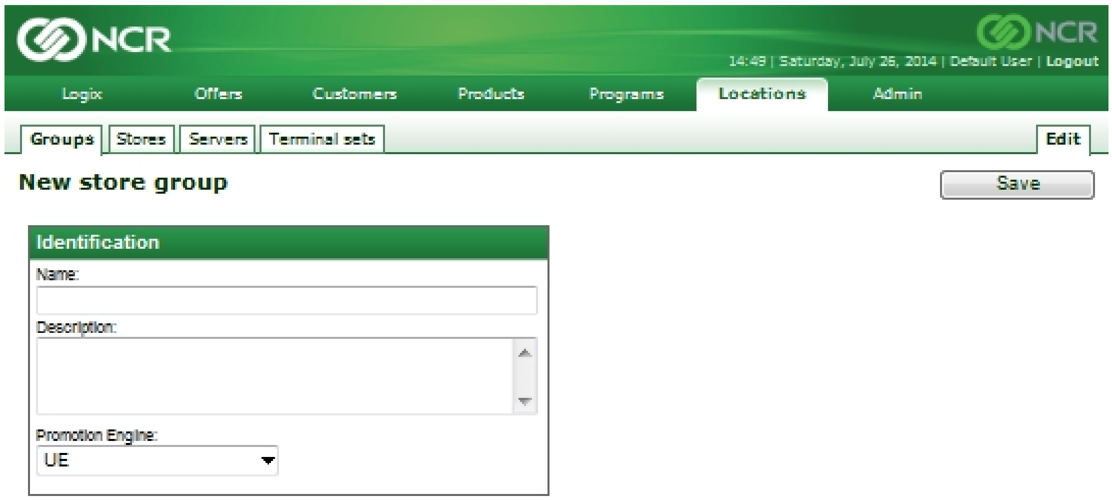
Section	Details
Identification	• **Name**—name of the store. • **Description**—describes the store. This section also displays the following information: • Promotion Engine • Information on when the group was created and last edited

Section	Details
	• Number of stores in the group
Contents	Displays a list of stores that are members of the group.
Add stores from list	Displays a list of available stores that can be added in the group. It allows users to add a store using the following buttons: • **Modify via hierarchy**—adds a store from a tree–like structure of nodes. • **Add selected to group**—adds a store from the store list.
Recently associated offers	Displays a list of offers used by the store group. **Note:** If an offer is configured to be associated with all stores, it is automatically associated with new store groups. For more information, refer to *Offer Locations* on page 354.

Creating Store Groups

To create a store, follow these steps:

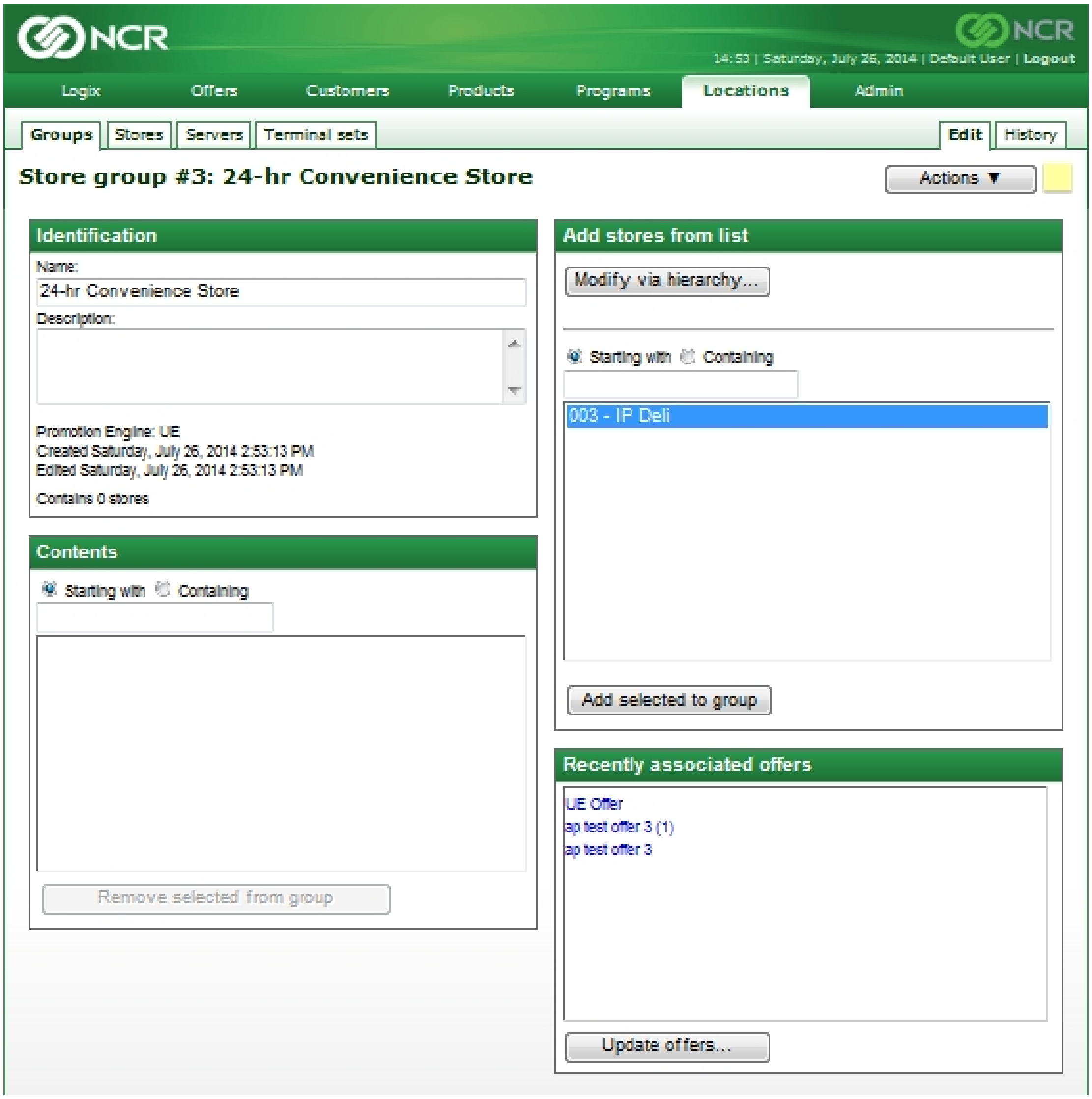
1. From the Store Groups page, select **New**. The New store page is displayed.



Note: If Logix is installed with multiple engines, they are displayed as options in the Promotion Engine drop–down list.

2. Enter the store details in the corresponding fields.

3. Select **Save**. The Store Group Configuration page is displayed.



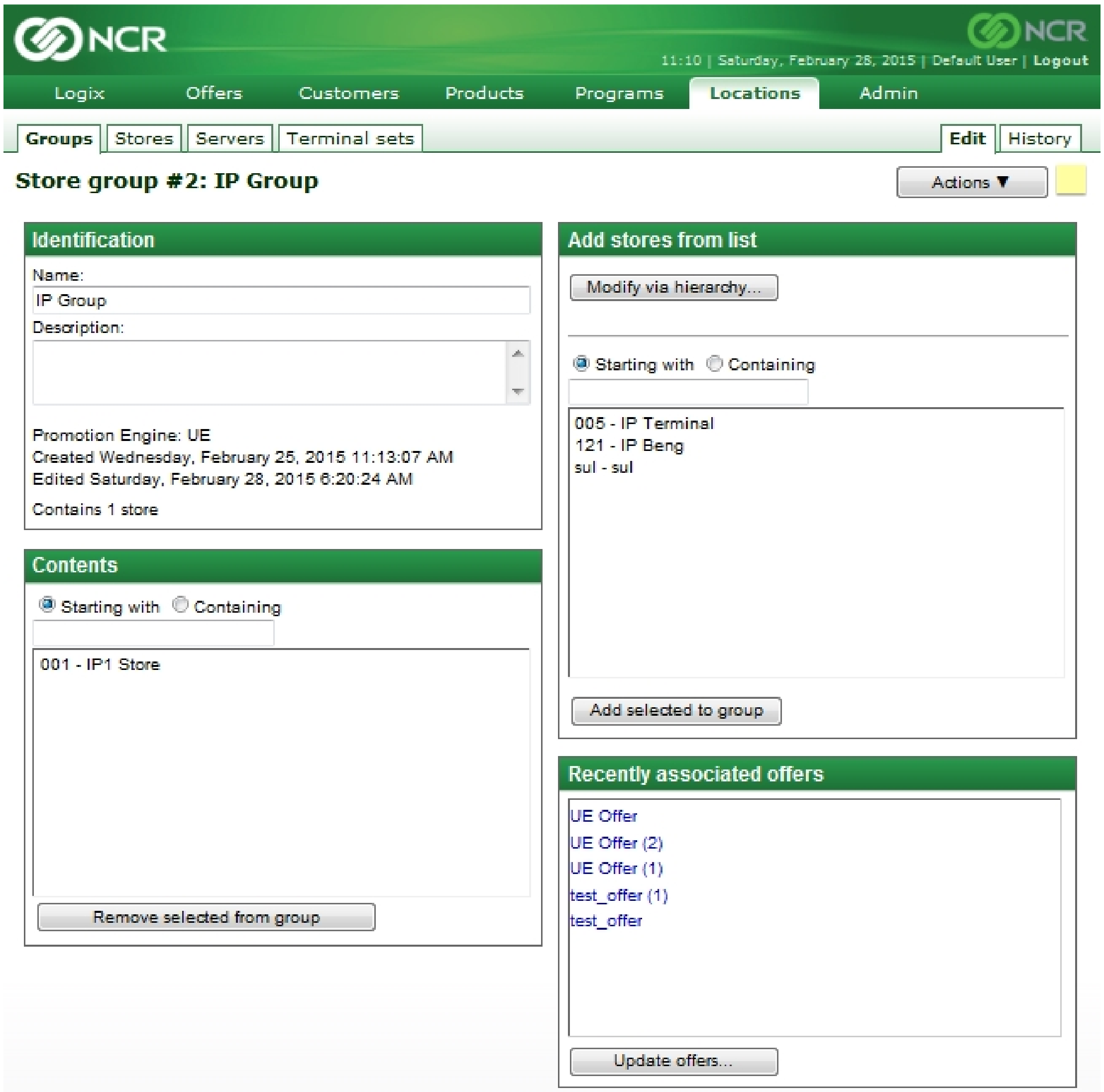
4. Define the store group configuration by doing any of the following:

- Associate a store with the store group. For more information, refer to *Associating Stores with Store Groups* on page 529.
- Associate an offer with the store group. For more information, refer to *Associating Offers with Store Groups* on the facing page.

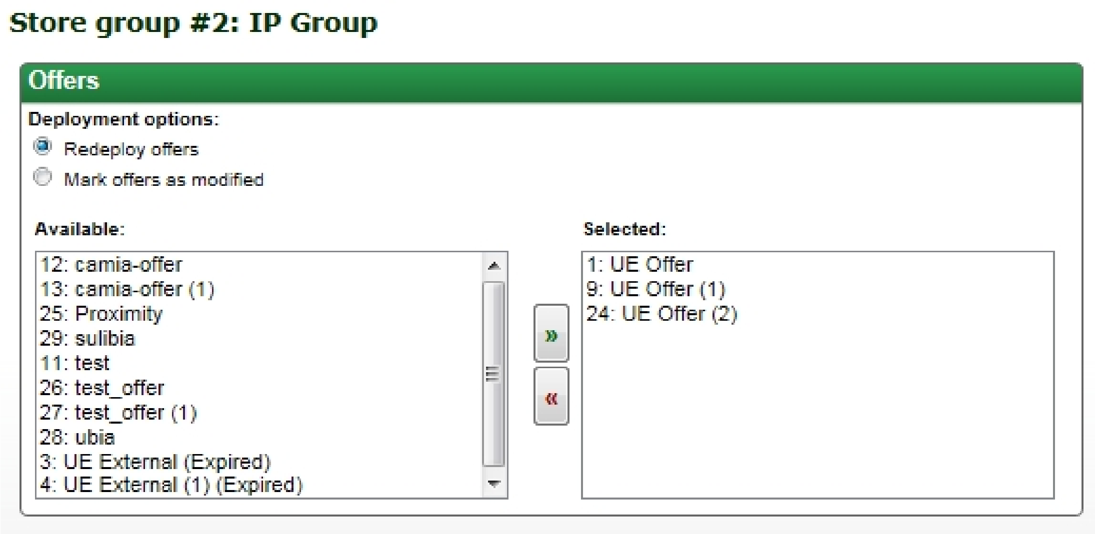
Associating Offers with Store Groups

To associate an offer from the store group configuration page, follow these steps:

1. From the Store Groups page, select a store group name. The corresponding Store Group Configuration page is displayed.



2. In the Recently associated offers section, select the **Update Offers. . .** button. The following window is displayed.



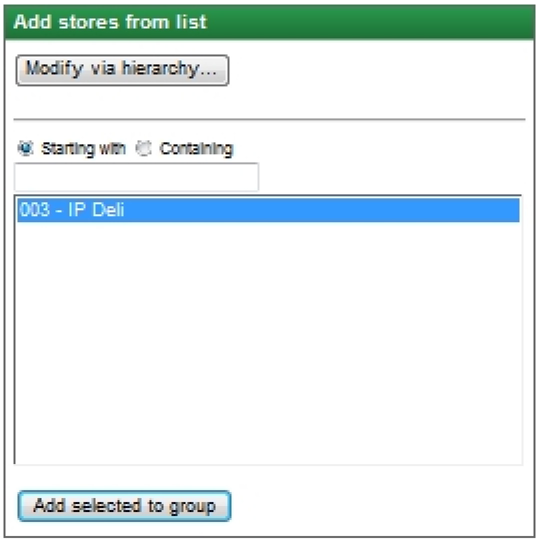
3. Select a deployment option:
   - **Redeploy offers**—automatically redeploys updated offers.
   - **Mark offers as modified**—indicates modified offers.
4. Do any of the following:
   - Add an offer by selecting it from the Available box and then, selecting the **green chevron** button. The offer is displayed in the Selected box.
   - Remove an offer by selecting it from the Selected box and then, selecting the **red chevron** button. The offer is displayed in the Available box.

Associating Stores with Store Groups

To associate a store with a store group, use any of the methods discussed in this section.

Method 1

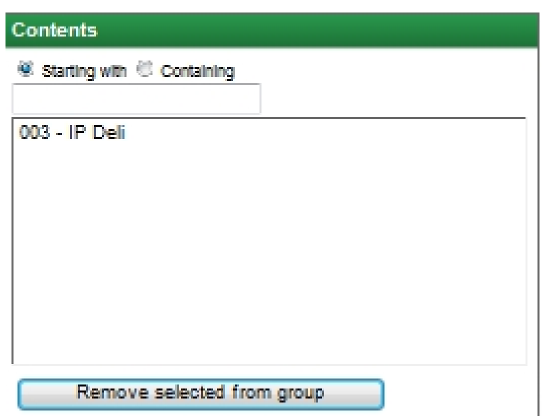
1. From the Store Groups page, select a store group. The Store Group Edit page is displayed.
2. Select a store from the Add stores from list section.



3. Select the **Add selected to group** button. A confirmation window is displayed.

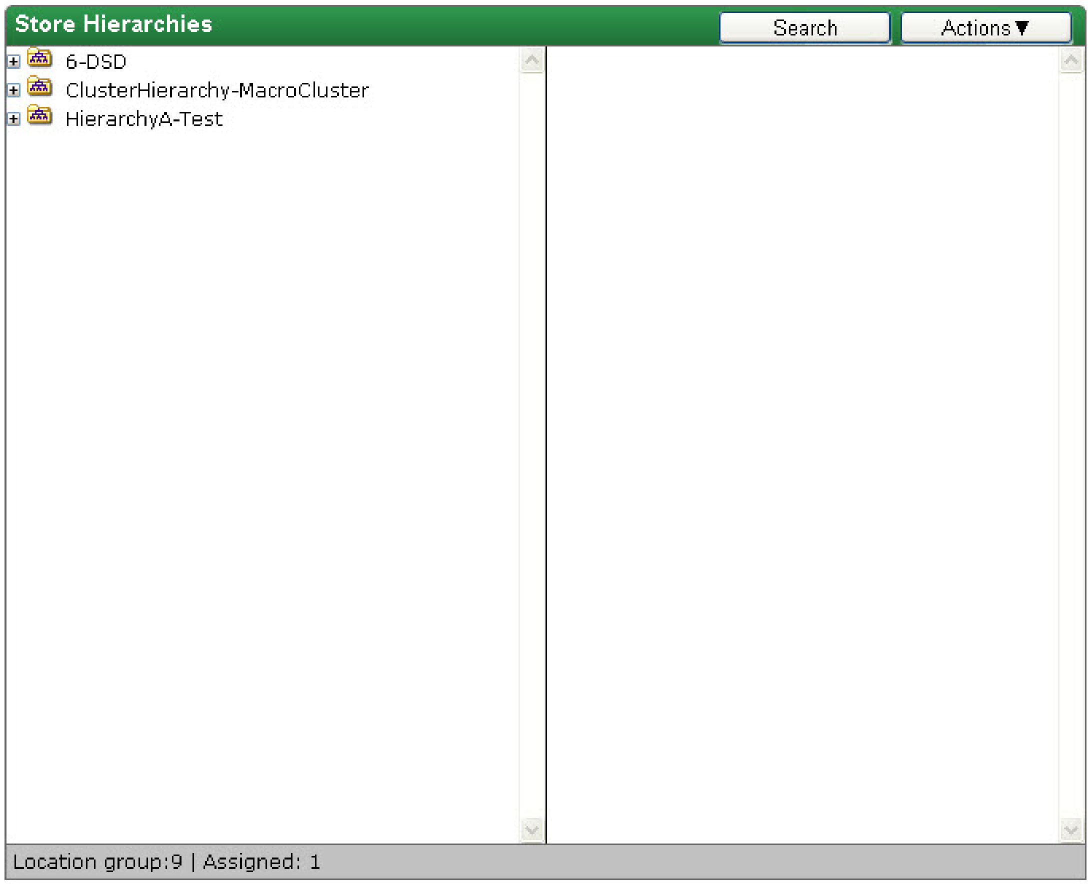
Note: All associated offers for the store group are deployed to the selected stores.

4. Select **OK**. The store is displayed in the Contents section.



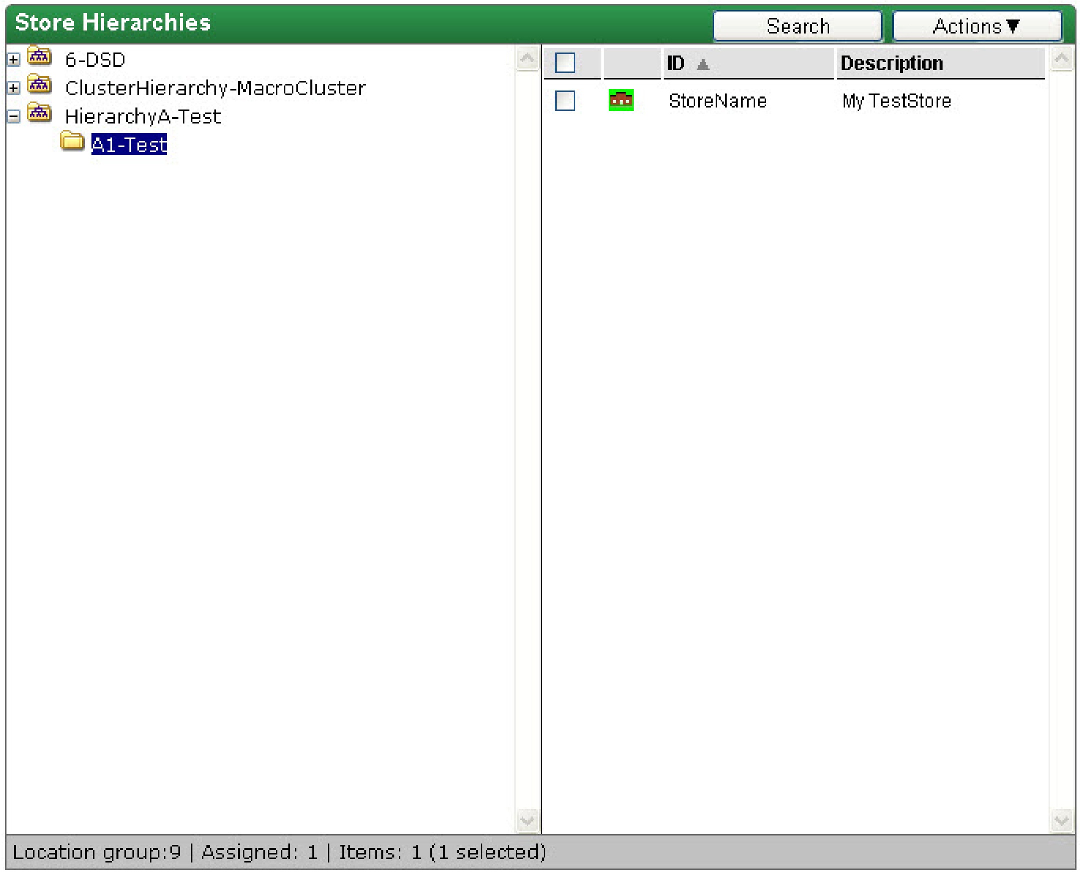
Method 2

1. From the Store Groups page, select a store group name. The corresponding store group configuration sub–page is displayed.
2. In the Add stores from list section, select the **Modify via hierarchy . . .** button. The Hierarchy window is displayed.



Note: Only stores associated with a store group can be removed.

3. Select a node. The left pane expands the hierarchy of folders and sub-folders, and the right pane displays the stores contained in the highlighted folder.

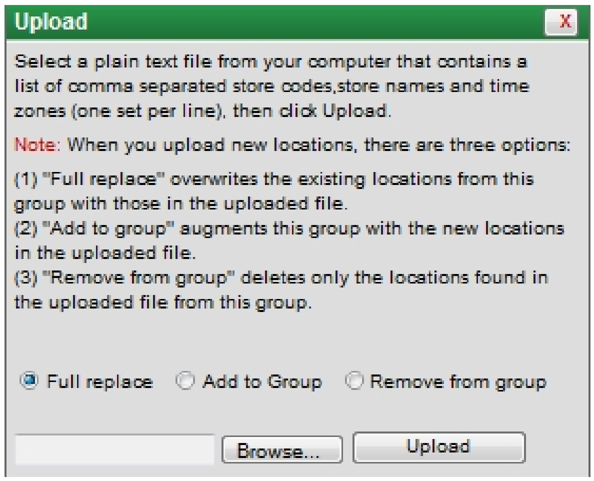


4. Select the store check box.
5. From the Actions menu, select **Add to group**. A pop–up window is displayed.
6. Select **OK**. The store is displayed in the Contents section in the Store Group Configuration page.

Method 3

To add stores to the store group using a plain text file, follow these steps:

1. From the Store Groups page, select a store name. The corresponding store group configuration page is displayed.
2. From the Actions menu, select **Upload**. A pop–up window is displayed.



3. Select **Browse** and then, select a plain text file.

Note: The plain text file contains a list of comma separated store codes, store names, and time zones.

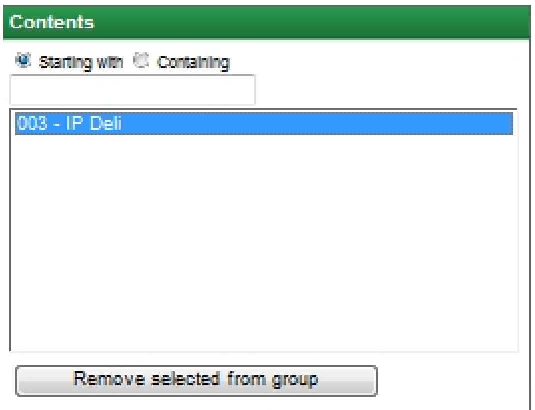
4. Select either of the following:
   - **Full replace**
   - **Add to Group**
5. Select **Upload**.

Removing Stores from Store Groups

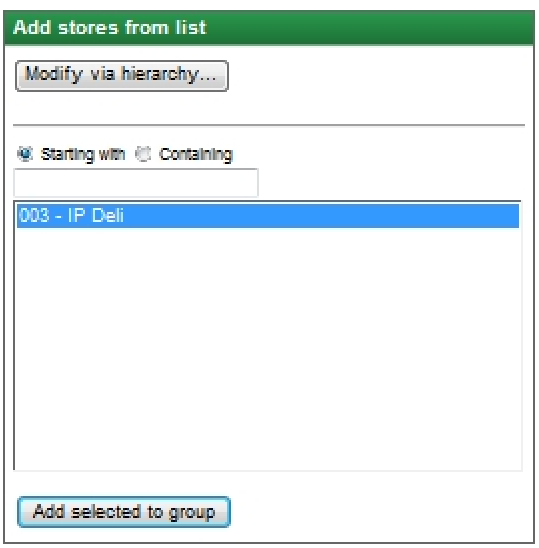
To remove an associated store from a store group, use any of the methods discussed in this section.

Method 1

1. From the Store Group Configuration page, select a store from the Contents section.

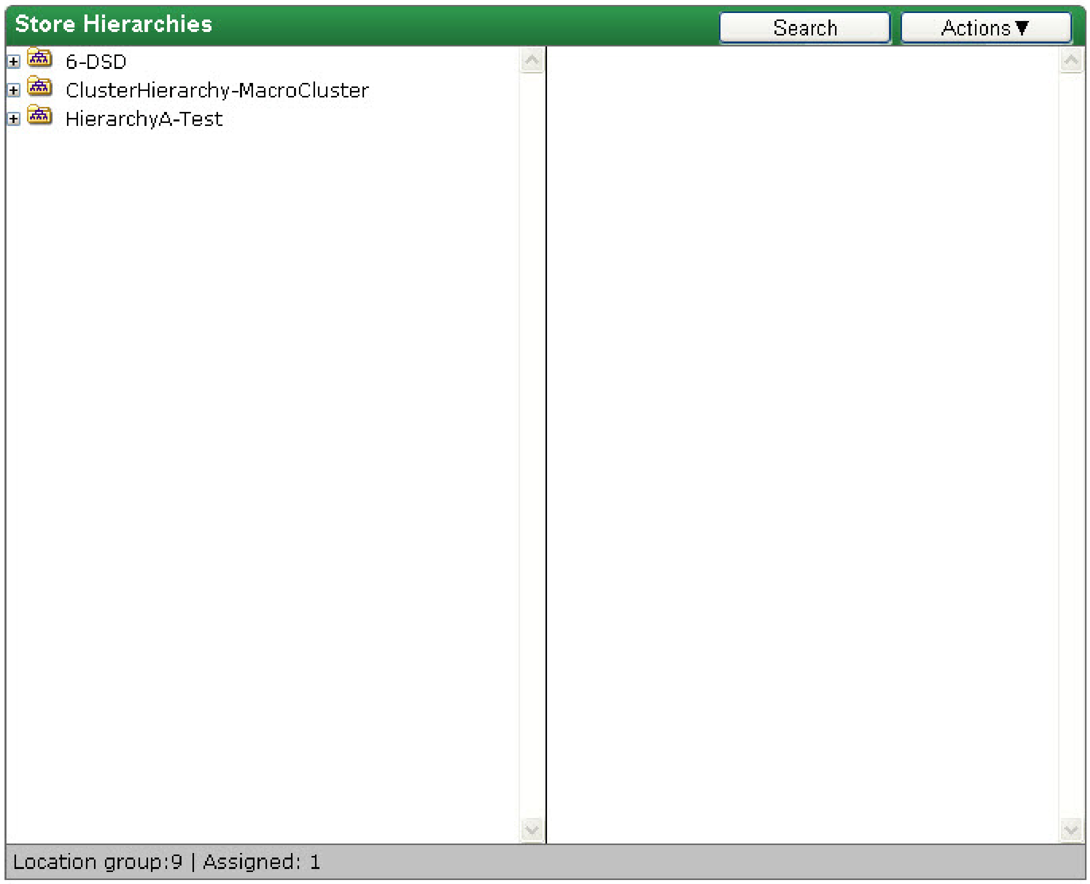


2. Select the **Remove selected from group** button. A confirmation window is displayed.
3. Select **OK**. The store is displayed in the Add stores from list section.

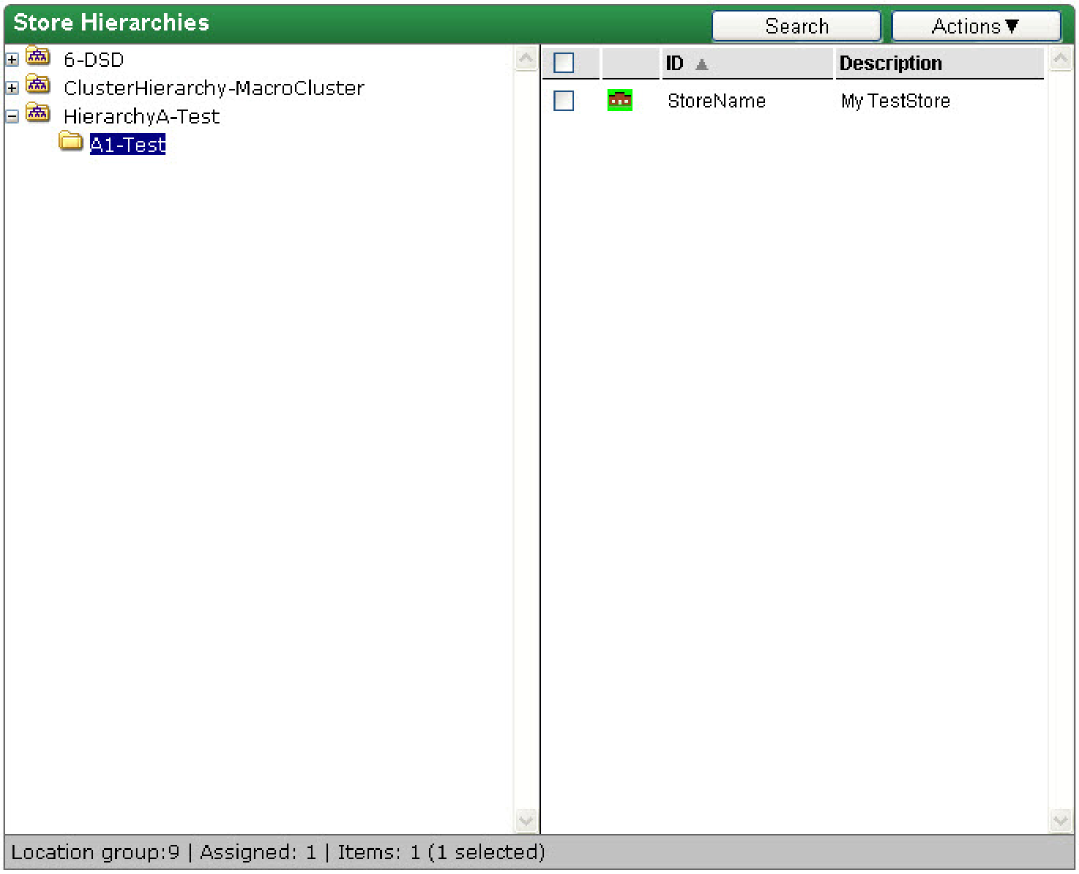


Method 2

1. From the Store Groups page, select a store group. The corresponding store group configuration sub–page is displayed.
2. In the Add stores from list section, select the **Modify via hierarchy . . .** button. The Hierarchy window is displayed.



3. Select a node. The left pane expands the hierarchy of folders and sub-folders, and the right pane displays the stores contained in the highlighted folder.

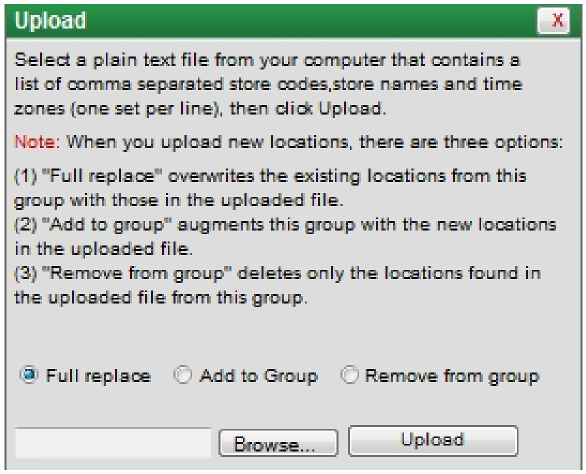


4. Select the store check box.
5. From the Actions menu, select any of these options:
   - **Remove from group** to remove only selected stores.
   - **Remove all** to remove all stores.
6. Select **OK**. The store is deleted from the Contents section in the Store Group Configuration page.

Method 3

To remove stores from store group using a plain text file, follow these steps:

1. From the Store Groups page, select a store name. The corresponding store group configuration page is displayed.
2. From the Actions menu, select **Upload**. A pop–up window is displayed.



3. Select **Browse** and then, select a plain text file.
4. Select **Remove from group**.
5. Select **Upload**.

Downloading Store List

To download the list of stores in a group, follow these steps:

1. From the Store Groups page, select a store name. The corresponding store group configuration page is displayed.
2. From the Actions menu, select **Download**. The application downloads the list of stores in plain text format.

Note: If the Contents section is empty, a list cannot be downloaded.

Deleting Store Groups

To delete a store group, follow these steps:

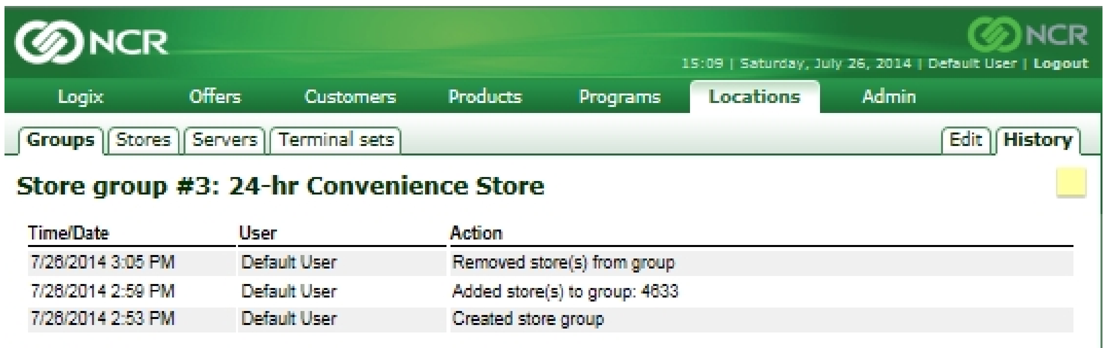
Note: Store groups associated with offers cannot be deleted.

1. From the Store Groups page, select a store group name. The corresponding Store Group Configuration page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**.

Tracking Store Group Changes

Logix allows users to track changes made to store groups, who made the changes, and when the changes were applied. These changes are recorded and displayed chronologically in the Store Group History sub–page. To view the history details of a store group, follow these steps:

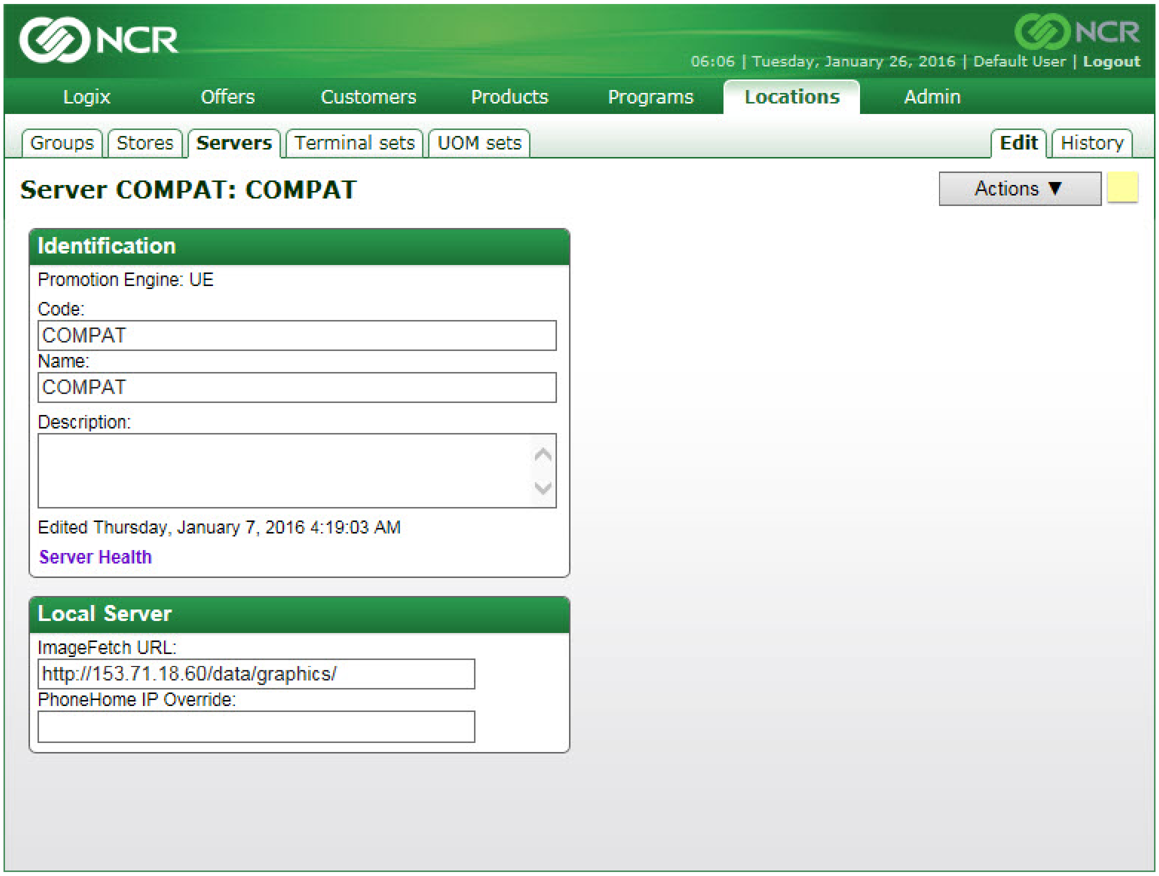
1. From the Store groups page, select a store group name. The corresponding Store Group Edit sub–page is displayed.
2. Select the **History** sub–page tab. The application displays the changes made to the store group.



Note: Select the Notes icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Accessing Server Configuration

Selecting a server name from the Servers page displays the corresponding server configuration page.



The Server Configuration page displays the following sections:

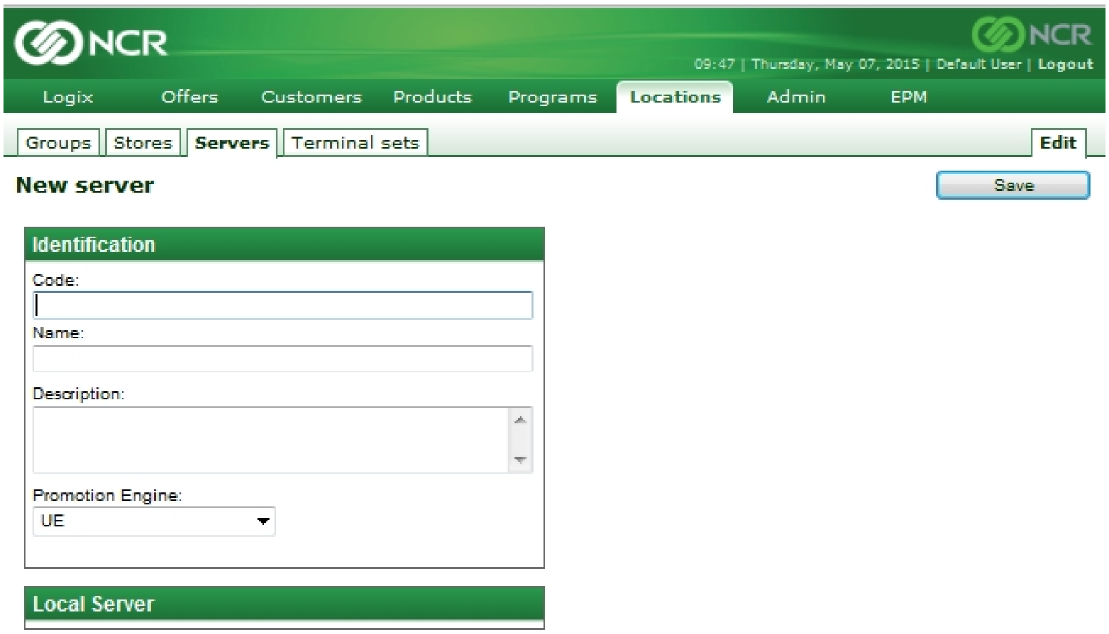
Section	Details
Identification	• **Promotion Engine**—the promotion engine configured with the Logix application. • **Code**—the value assigned by the retailer to the server. • **Name**—name of the server. • **Description**—describes the server. • **Server Health**—links with the Server Health page in the Admin tab. The Server Health page provides detailed server– and performance–related information about each server components. For more information, refer to *Server Health* on page 676.
Local Server	• **ImageFetch URL**—specifies the standard URL used by ImageFetch. • **PhoneHome IP Override**—indicates the URL path where customer records are created. **Note:** These Local Server settings are available only after Initial Program Load (IPL) occurs.

Creating Servers

To create a server, follow these steps:

Note: Logix UE permits only one server configuration.

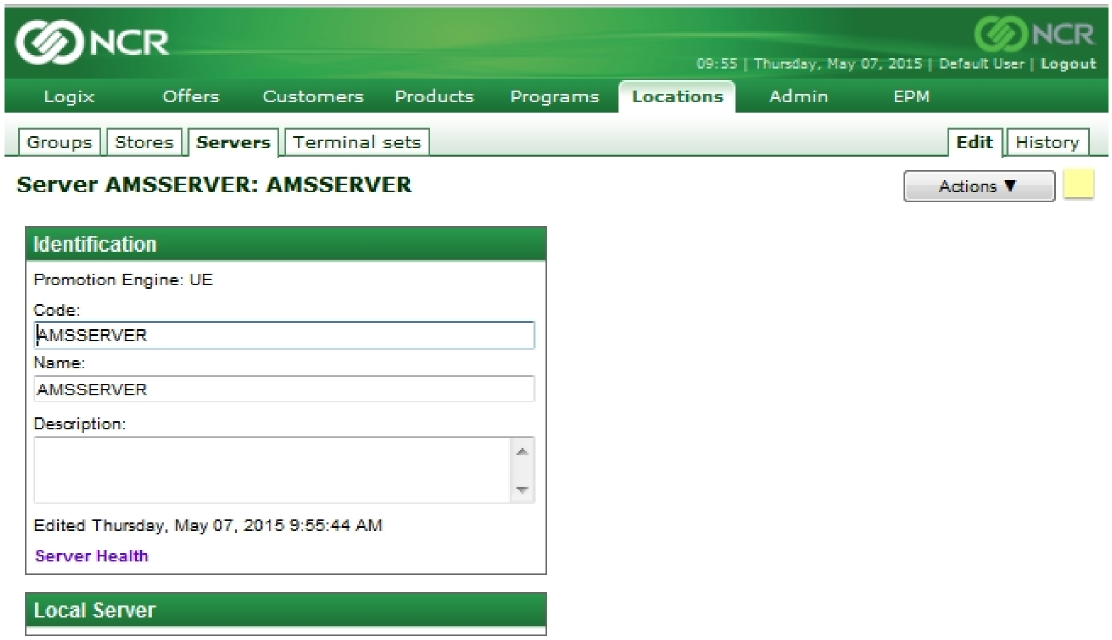
1. From the Servers page, select **New**. The New server page is displayed.



Note: If Logix is installed with multiple engines, they are displayed as options in the Promotion Engine drop–down list.

2. Enter the server details in the corresponding fields.

3. Select **Save**. The Server Configuration page is displayed.



Deleting Servers

To delete a server, follow these steps:

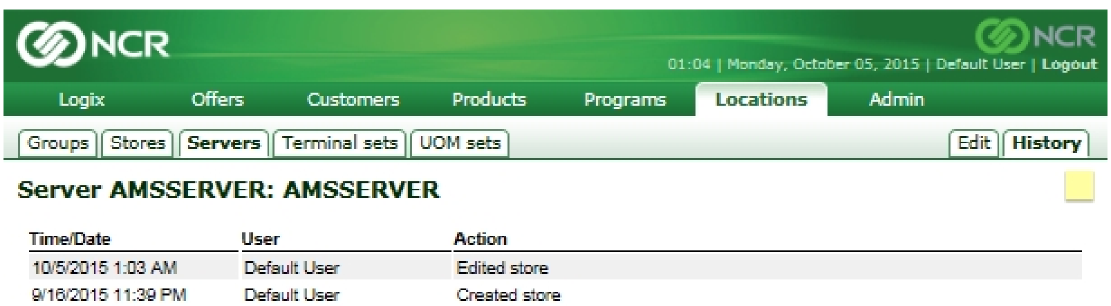
Note: A store server that is already used for Serial/IPL/Fetch cannot be deleted.

1. From the Servers page, select a server name. The Server Configuration page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**.

Tracking Server Changes

Logix allows users to track changes made to servers, who made the changes, and when the changes were applied. These changes are recorded and displayed chronologically in the Servers History sub–page. To view the history details of a server, follow these steps:

1. From the Servers page, select a server name. The corresponding Server Edit sub–page is displayed.
2. Select the **History** sub–page tab. The application displays the changes made to the server.



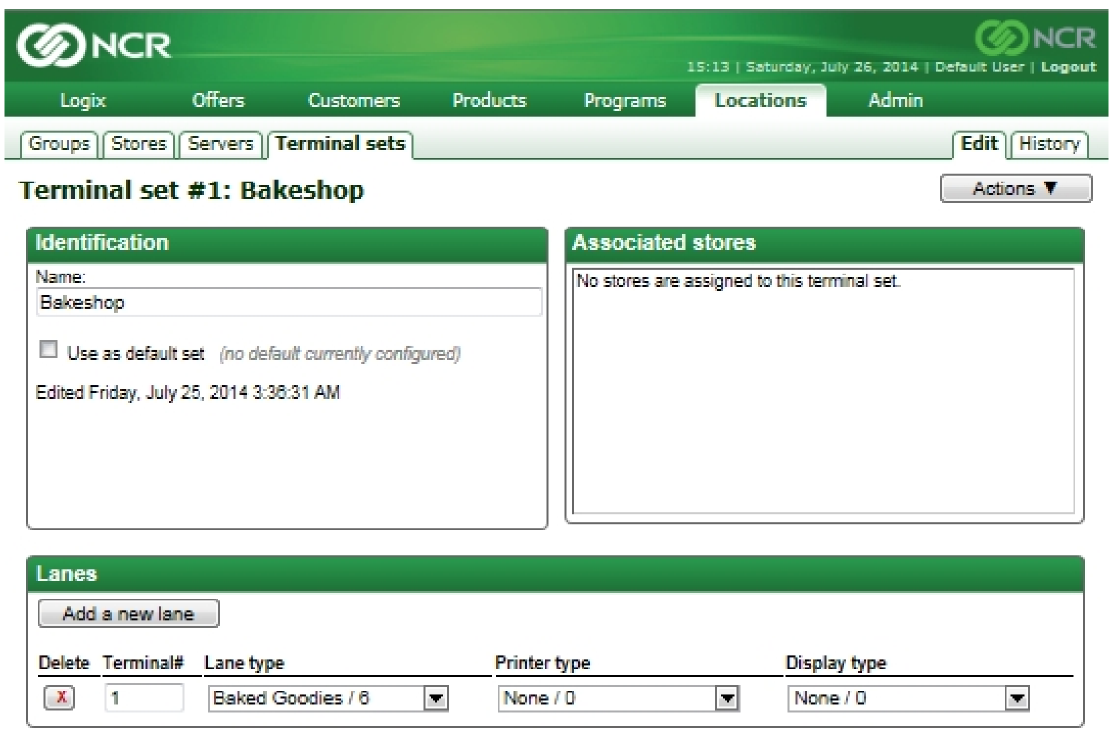
Note: Select the Notes icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Accessing Terminal Set Configuration

To access a terminal set configuration, follow these steps:

1. From the Locations tab, select the **Terminal Sets** page tab. The Terminal Sets page is displayed.

2. Select a terminal set name. The corresponding terminal set configuration page is displayed.



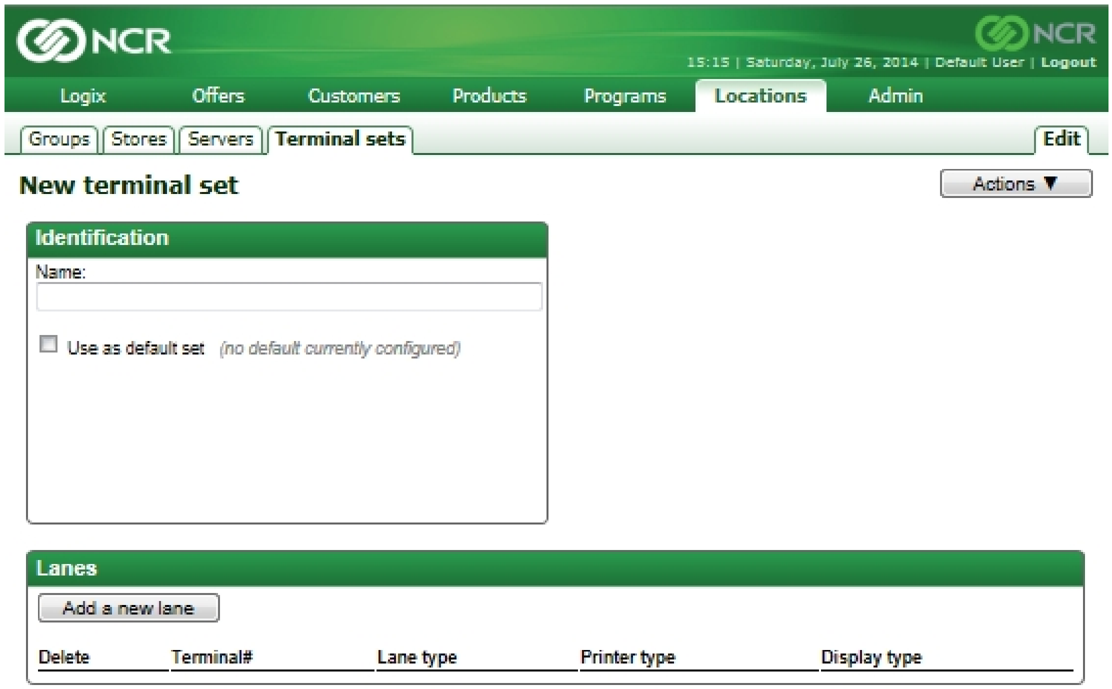
The Terminal Set configuration page displays the following sections:

Section	Details
Identification	• **Name**—name of the terminal set. • **Use as default** check box—select this setting to use this terminal set as default. This section also displays information on when the terminal set was last edited.
Associated stores	Displays the stores that are associated with the terminal set. For more information, refer to *Associating Stores with Terminal Sets* on page 520.
Lanes	Displays the lanes that are available in the store. **Note:** To create a lane type, refer to *Creating Terminal Types* on page 660.

Creating Terminal Sets

To create a terminal set, follow these steps:

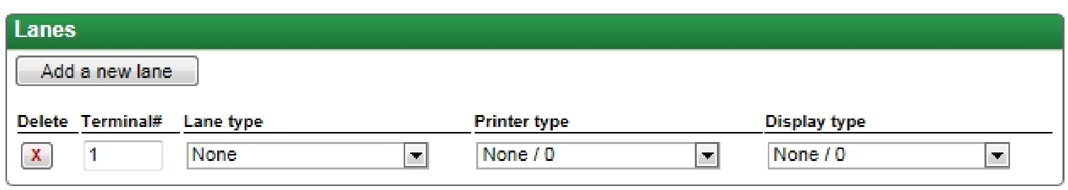
1. From the Terminal Sets page, select **New**. The application displays the New Terminal Set page.



The New Terminal Set page displays the following sections:

- Identification—name of the Terminal Set.
- Lanes—identifies the terminal type used by the store group.

2. Enter the Terminal Set name.
3. Select **Add a new lane**. The following fields are displayed.

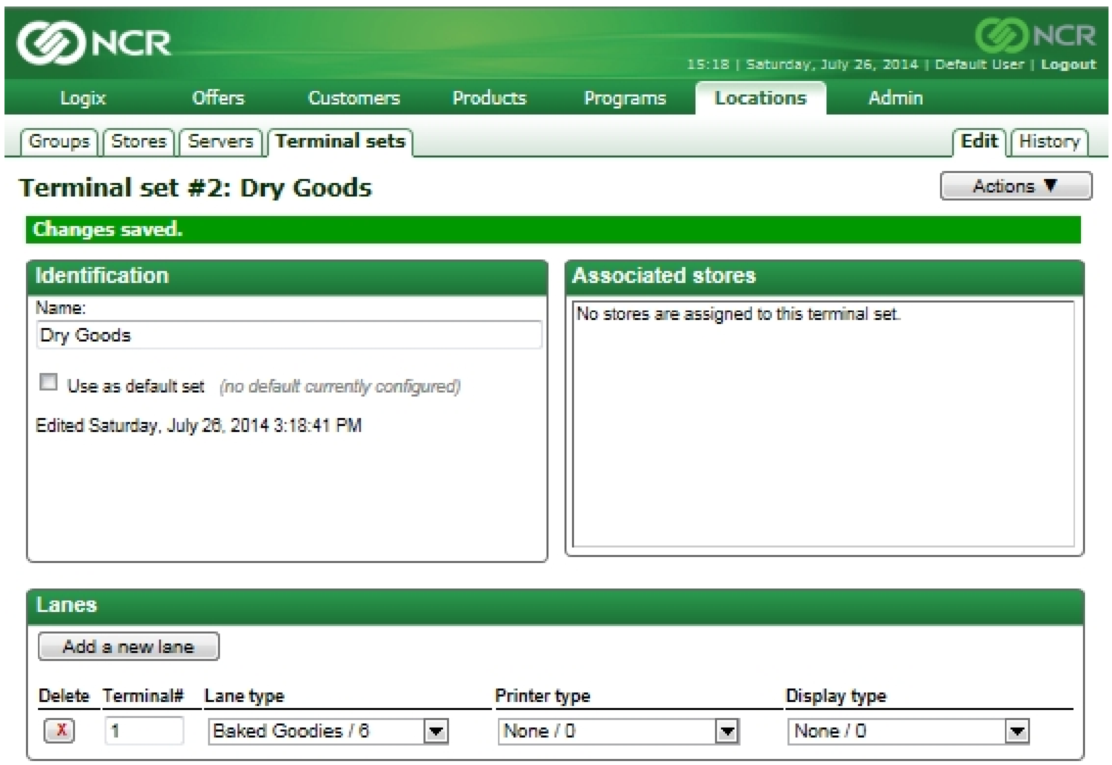


Note: The lane type drop–down list is configured in the Terminal list page from the Admin tab.

4. Enter the terminal number.
5. Select the configuration for the following parameters from the corresponding drop–down lists:
   - Lane type
   - Printer type

   Note: Printer type options are set by default during the Logix installation process that used UE.

   - Display type
6. From the Actions menu, select **Save**. The Terminal Sets page displays the new terminal set details.



7. Define the Terminal Set configuration by associating a store with the Terminal Set. For more information, refer to *Associating Stores with Terminal Sets* on page 520.

Deleting Terminal Sets

To delete a terminal set, follow these steps:

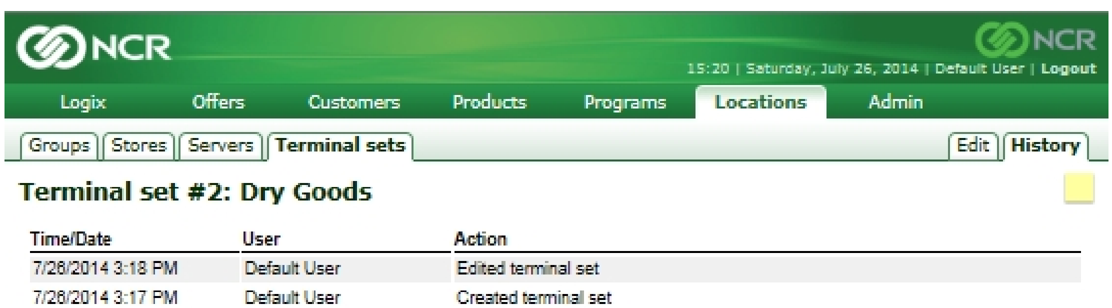
Caution: Ensure that deleting a terminal set does not interfere with active or pending offers.

1. From the Terminal Set page, select a terminal set. The Terminal Set page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**.

Tracking Terminal Set Changes

Logix allows users to track changes made to terminal sets, who made the changes, and when the changes were applied. These changes are recorded and displayed chronologically in the Terminal Set History sub–page. To view the history details of a terminal set, follow these steps:

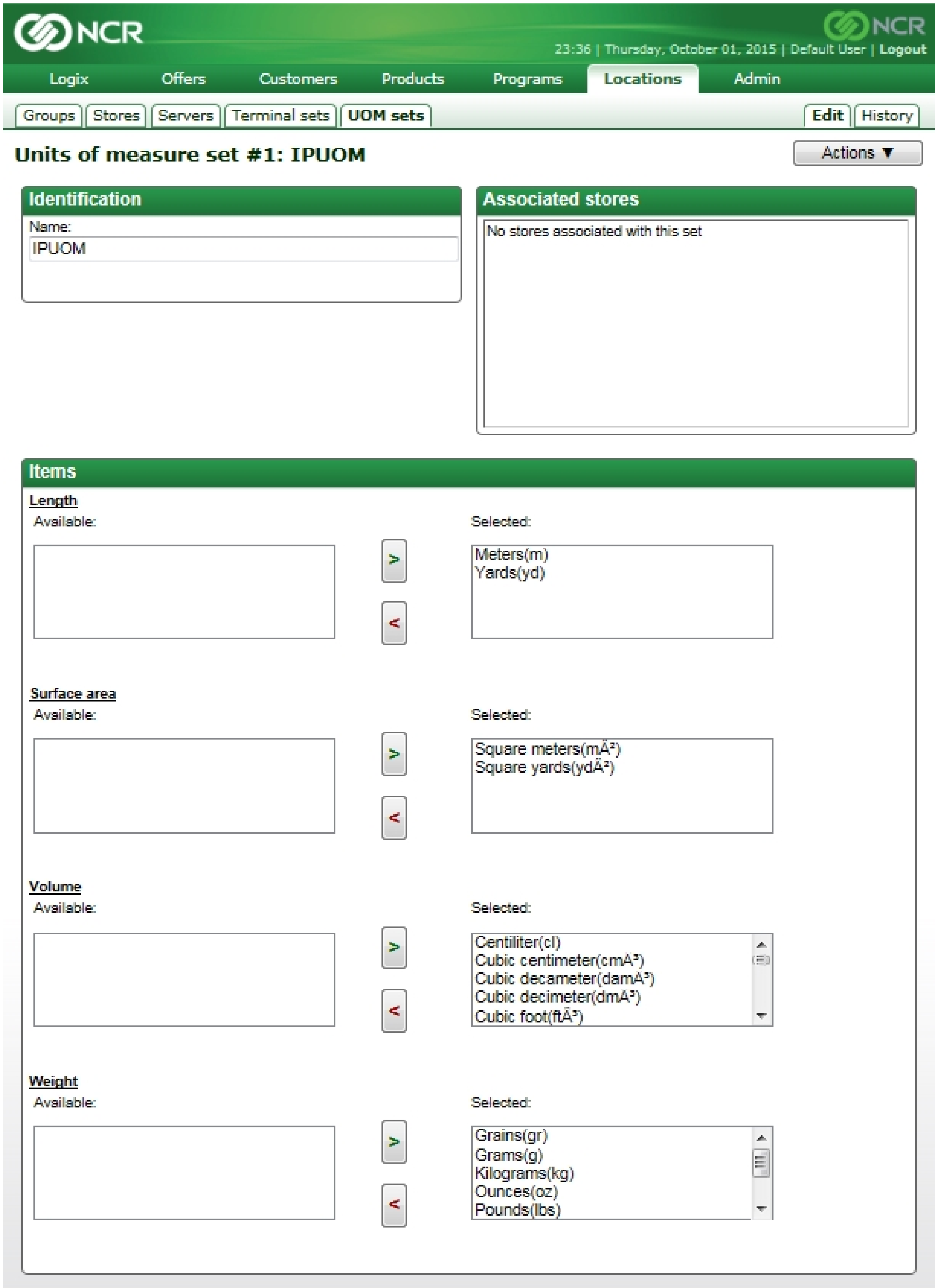
1. From the Terminal Sets page, select a terminal set name. The corresponding terminal set configuration page is displayed.
2. Select the **History** sub–page tab. The application displays the changes made to the terminal set.



Note: Select the Notes icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Accessing UOM Set Configuration

Selecting a UOM set from the Units of Measures (UOM) Sets page displays the corresponding UOM set configuration page as shown in the following example:



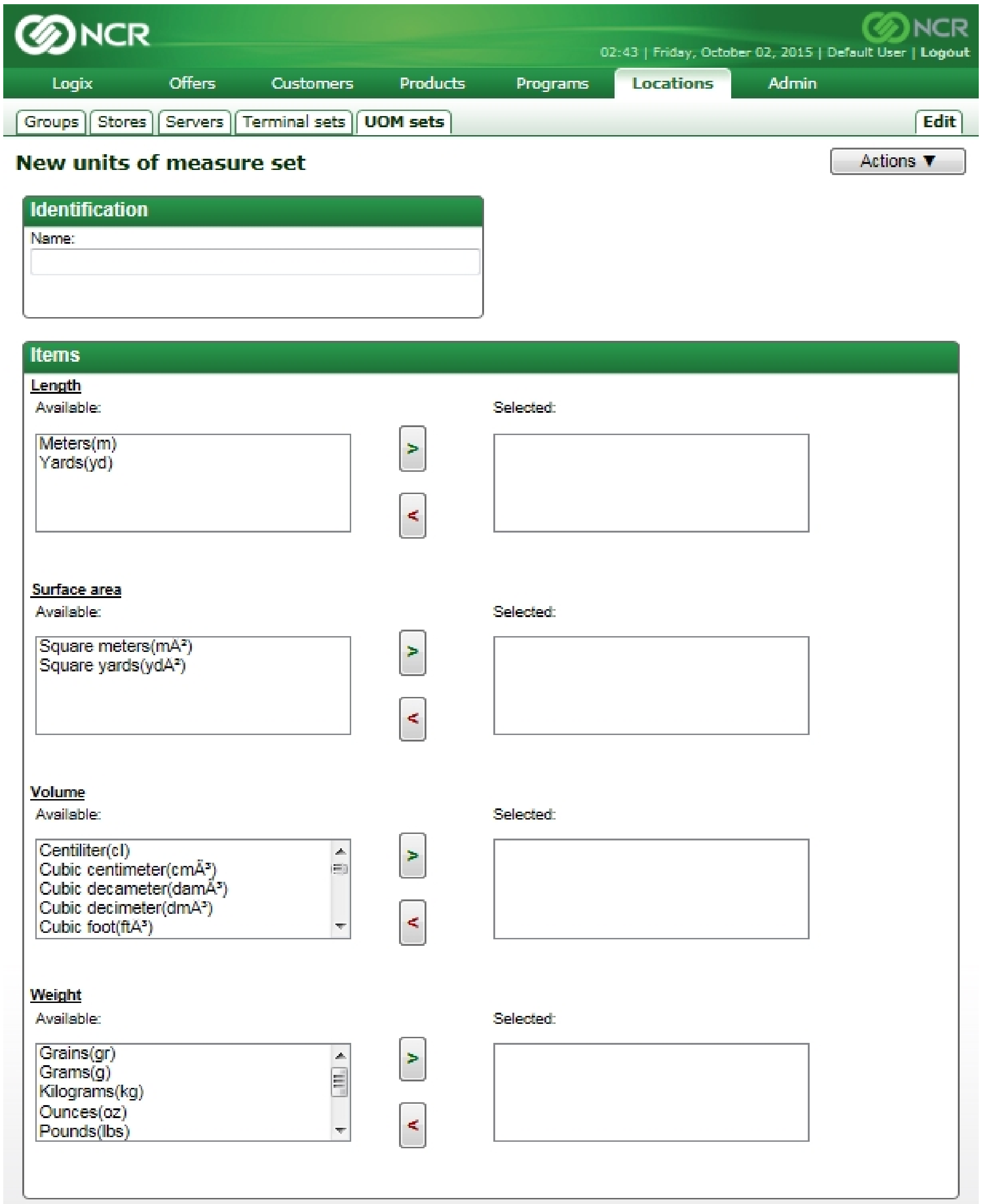
The UOM Set configuration page displays the following sections:

Section	Details
Identification	Displays the name of the UOM set.
Associated stores	Displays the stores that are associated with the terminal set. For more information, refer to *Configuring Store Localization Settings* on page 517.
Items	Indicates the types of units of measure that can be applied to items. Setting a unit of measure is used to determine if a customer qualifies for an offer.

Creating UOM Sets

To create a new UOM set, follow these steps:

1. From the UOM Sets page, select **New**. The application displays the New units of measure set page.



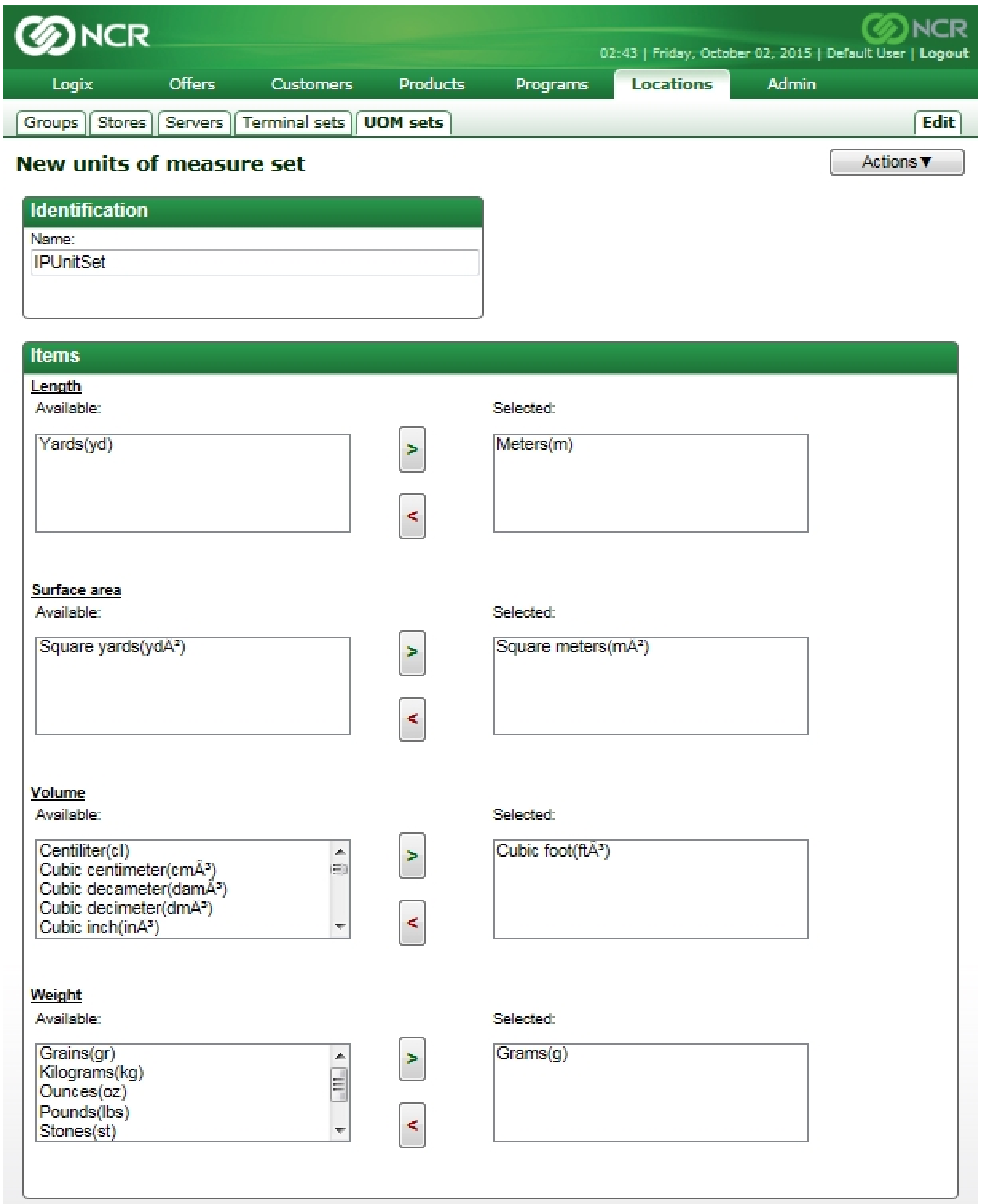
The New units of measure set page displays the following sections:

- **Identification**—name of the UOM set.
- **Items**—displays the types of units of measure that can be applied to items.

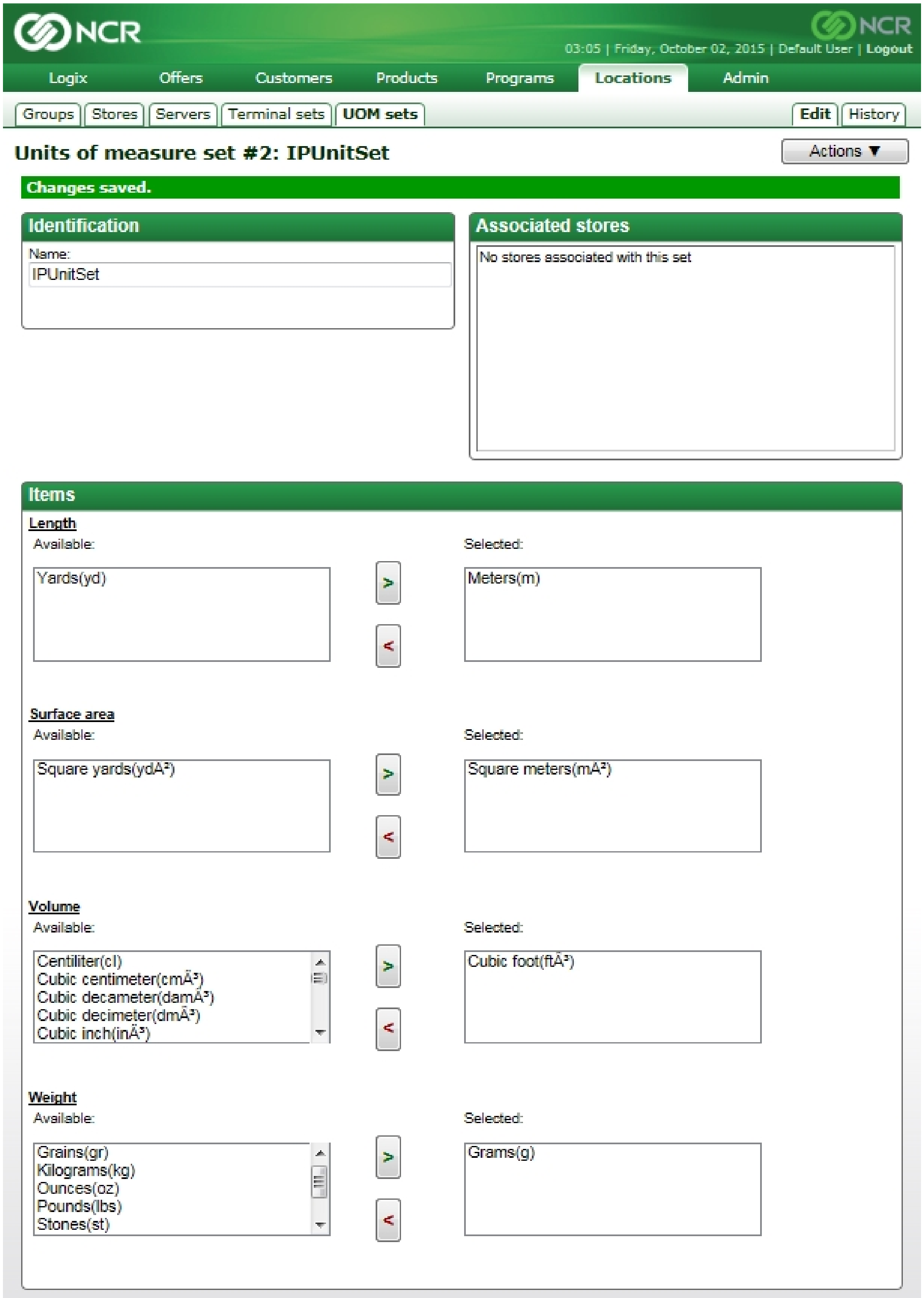
2. In the Identification field, enter the UOM set name.

3. Under any of the following properties to be measured, select a unit of measure and then, use the green chevron button.
   - Length
   - Surface area
   - Volume
   - Weight

   The selected unit of measure is displayed in the corresponding Selected box.



4. From the Actions menu, select **Save**. The UOM sets page displays the new UOM set details.



5. Define the UOM set configuration by associating a store with the UOM Set. For more information, refer to Associating Stores with UOM Sets on page 519.

Note: For precision purposes, configure the precision level of each unit of measure. Values for weight, length, surface area, and volume can have have up to three decimal values. Although setting the precision level can be performed after creating UOM sets, it is recommended to set the precision levels before the UOM sets are created. For more information, refer to *Units of Measure (UOM)* on page 636.

Deleting UOM Sets

To delete a UOM set, follow these steps:

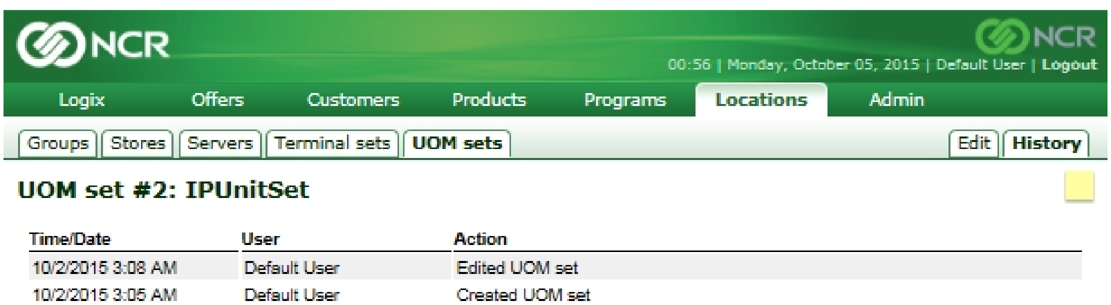
Note: UOM sets associated with stores cannot be deleted.

1. From the UOM Sets page, select a UOM Set name. The corresponding UOM Set configuration page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**. The UOM set is deleted from the UOM Sets page.

Tracking UOM Set Changes

Logix allows users to track changes made to UOM sets, who made the changes, and when the changes were applied. These changes are recorded and displayed chronologically in the UOM Set History sub–page. To view the history details of a UOM set, follow these steps:

1. From the UOM Sets page, select a UOM set name. The corresponding UOM Set Edit sub–page is displayed.
2. Select the **History** sub–page tab. The application displays the changes made to the UOM set.



Note: Select the Notes icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

Chapter 9: Configuring User Roles and User Accounts

Overview

Logix allows users to configure their accounts and control their access to certain sections in the Logix UI. This chapter provides the procedures on how to manage these accounts and their corresponding roles. For information on specific permissions when configuring roles, refer to *Permissions* on page 839.

Roles

Roles are groups of permissions, assigned to users to control the areas of Logix that they are allowed to view or edit. The individual permissions are fixed features of the system and cannot be edited. This section describes types of roles that can be used in Logix.

Note: Current users cannot alter their own roles. For more information, refer to *Permissions* on page 839.

Standard Role

The Administrator role is a standard role that is pre–configured in Logix.

Administrator

This role includes all Logix permissions. It is granted only to one or a small number of system administrators. Administrators can view and edit all system settings including creating, editing, and deleting user accounts.

Recommended Roles

Recommended roles are created and managed through the Logix UI. They are configured to meet specific needs.

Sub–Administrator

This role grants the same permissions as an Administrator, but sub–administrators cannot change their own roles.

Permission Exceptions

Refer to the following table for a list of permissions that are excluded from a sub–administrator role:

Category	Permission
Administration	• Create users • Delete users • Edit other users • Edit own roles

Power User

This role has access to all non–administrative Logix functionality, and some non–system–related administrative areas.

Permission Exceptions

Refer to the following table for a list of permissions that are excluded from a power user role:

Category	Permission
Administration	• Access logs • Access other users' info • Access system health • Access system settings • Create users • Delete users • Edit other users • Edit own roles • Edit roles • Edit stores • Edit terminals

Standard User

This role has access to all non–administrative areas of Logix.

Permission Exceptions

Refer to the following table for a list of permissions that are excluded from a standard user role:

Category	Permission
Administration	• Access configuration • Access logs • Access offer health • Access other users' info • Access reports • Access store health • Access stores • Access system health • Access system settings • Create users • Delete users • Edit categories • Edit departments • Edit other users • Edit own roles • Edit product hierarchies • Edit roles • Edit store hierarchies • Edit stores • Edit tender types • Edit terminals

Help Desk

This role has access only to the areas of the UI concerning customers and customer–related data.

Permission Inclusions

Refer to the following table for a list of permissions that are included in a help desk role:

Category	Permission
Administration	• Access history
Customers	• Access customer inquiry • Access customer notes • Access customer offers • Access household cardholder • Access redemption history • Access transaction history • Add customer notes • Add customer to offer • Add household to cardholder • Delete customer from offer • Delete household cardholder • Edit accumulation balances • Edit customer identity data • Edit customer information • Edit customer offers • Edit points balances • Edit stored value • View customer identity data
Offers	• Access offers
Products	• Access product inquiry

Restricted

This role grants minimum access to Logix. It allows users to access only the following pages:

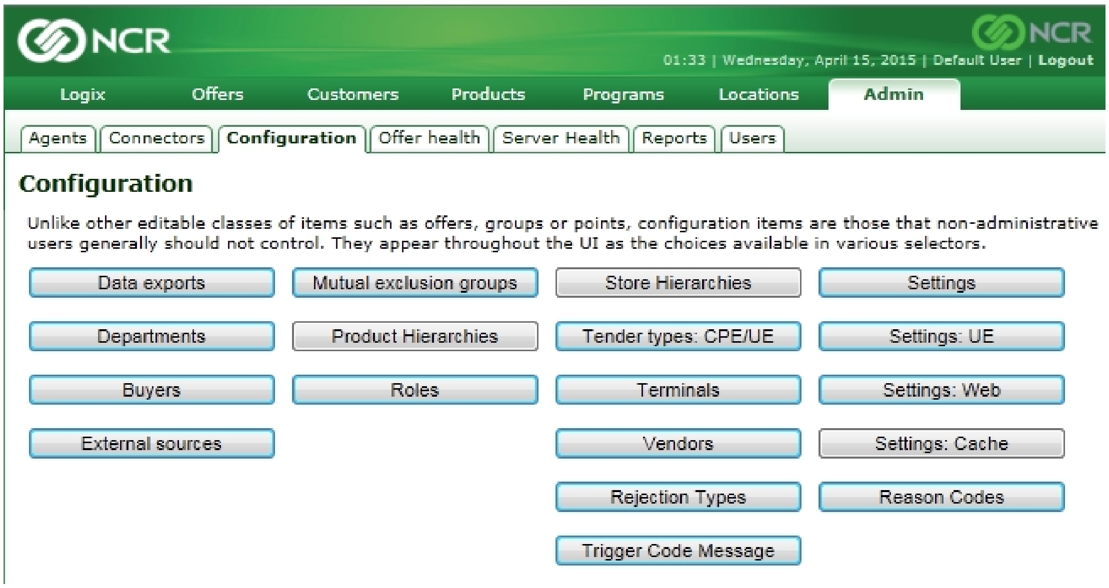
- Status page
- About page
- Their own user page
- Logix User Guide

The Restricted role is usually granted to new users who are not familiar with the system and need access to the documentation.

Accessing Role Configuration

To access role settings, follow these steps:

1. Log on to Logix. The default page is displayed.
2. From the Admin main tab, select the **Configuration** page tab. The Configuration page is displayed.

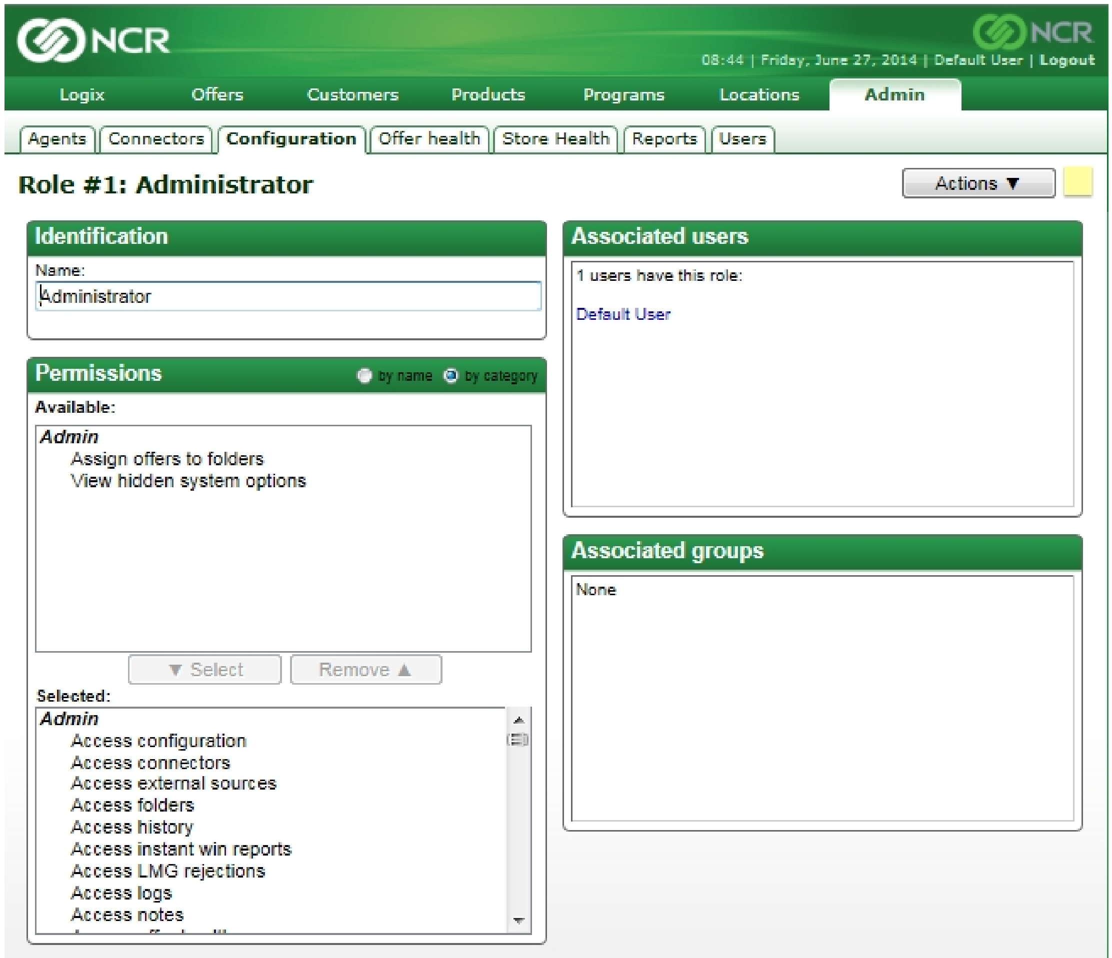


3. Select the **Roles** button. The Roles page is displayed.

The Roles page displays the following information:

- Current roles in the system
- Number of permissions within each role
- Number of users who are associated with the role

4. Select a role name. The corresponding Role Configuration page is displayed.



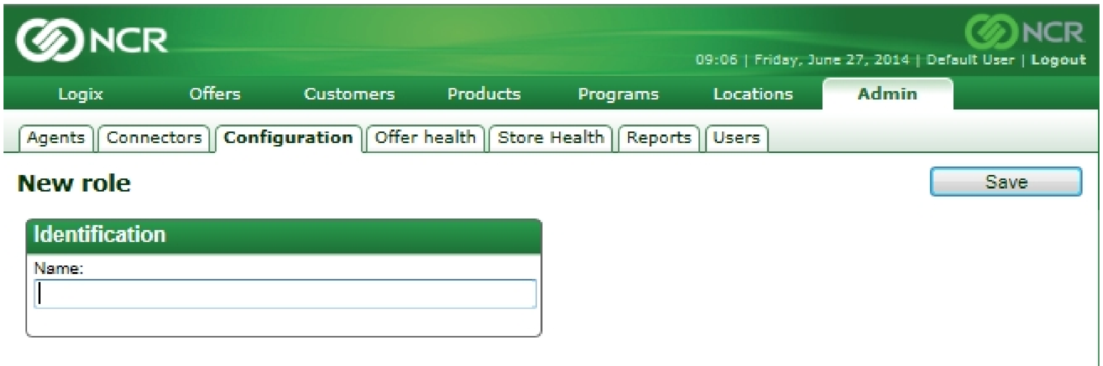
The Role Configuration page displays the following sections:

Section	Description
Identification	Displays the role name.
Permissions	Displays permissions that can be added to, or removed from a role. • **Available box**—displays permissions that can be added to the role. • **Selected box**—displays permissions that are currently part of the role.
Associated users	Displays user names that are using the role. For more information, refer to *Associating Users with Roles* on page 580.
Associated groups	Displays customer group names that are using the role. To associate a customer group with a role, refer to *Assigning Editing Control* on page 364.

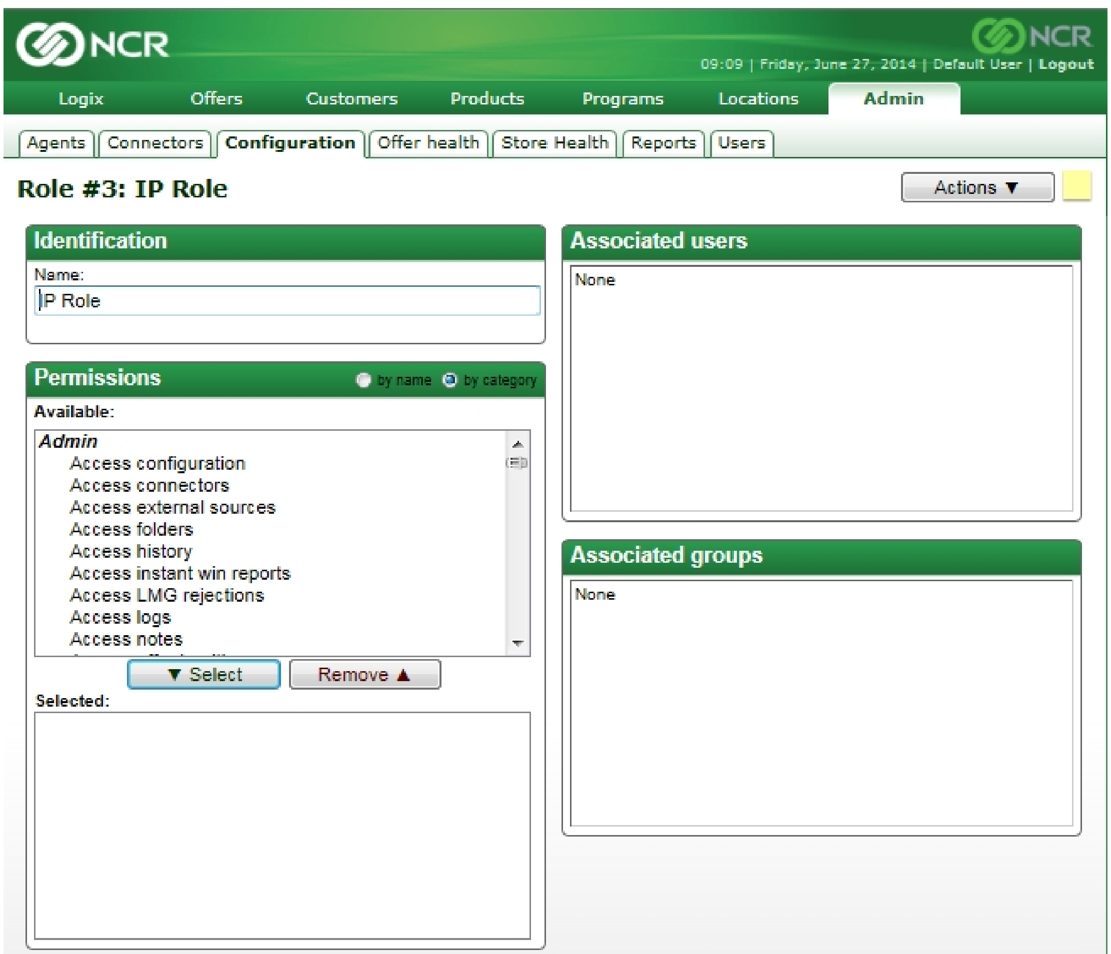
Creating Roles

To create user roles, follow these steps:

1. From the Roles page, select **New**. The New Role page is displayed.



2. Enter the role **Name**.
3. Select **Save**. The Role Configuration page is displayed.



4. Do any of the following:
   - Set permissions for the role. For more information, refer to *Configuring Role Permissions* on the facing page.
   - Associate users with a role. For more information, refer to *Associating Users with Roles* on page 580.
   - Associate groups with a role. For more information, refer to *Assigning Editing Control* on page 364.

Configuring Role Permissions

To configure permissions for a role, follow these steps:

1. From the Role Configuration page, select a role name. The Role Configuration page is displayed.
2. In the Permissions section, do any of the following:
   - Add permissions to a role. To add permissions to a role, highlight a role from the Available box and then, use the **Select** button. The permissions are added in the Selected box.
   - Remove permissions from a role. To remove permissions from a role, highlight a role from the Selected box and then, use the **Remove** button. The permissions are added in the Available box.
3. From the Actions menu, select **Save**.

Deleting Roles

To delete user roles, follow these steps:

Note: The Administrator role cannot be edited or deleted because it is a pre–installed role.

1. From the Roles page, select a role name. The Role Configuration page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.

   Note: Roles associated with users cannot be deleted.
3. Select **OK**.

Users

The Users page permits users to create or modify user accounts. These tasks are generally reserved for administrators. This section provides procedures on configuring user settings.

Accessing User Settings

To access user settings, follow these steps:

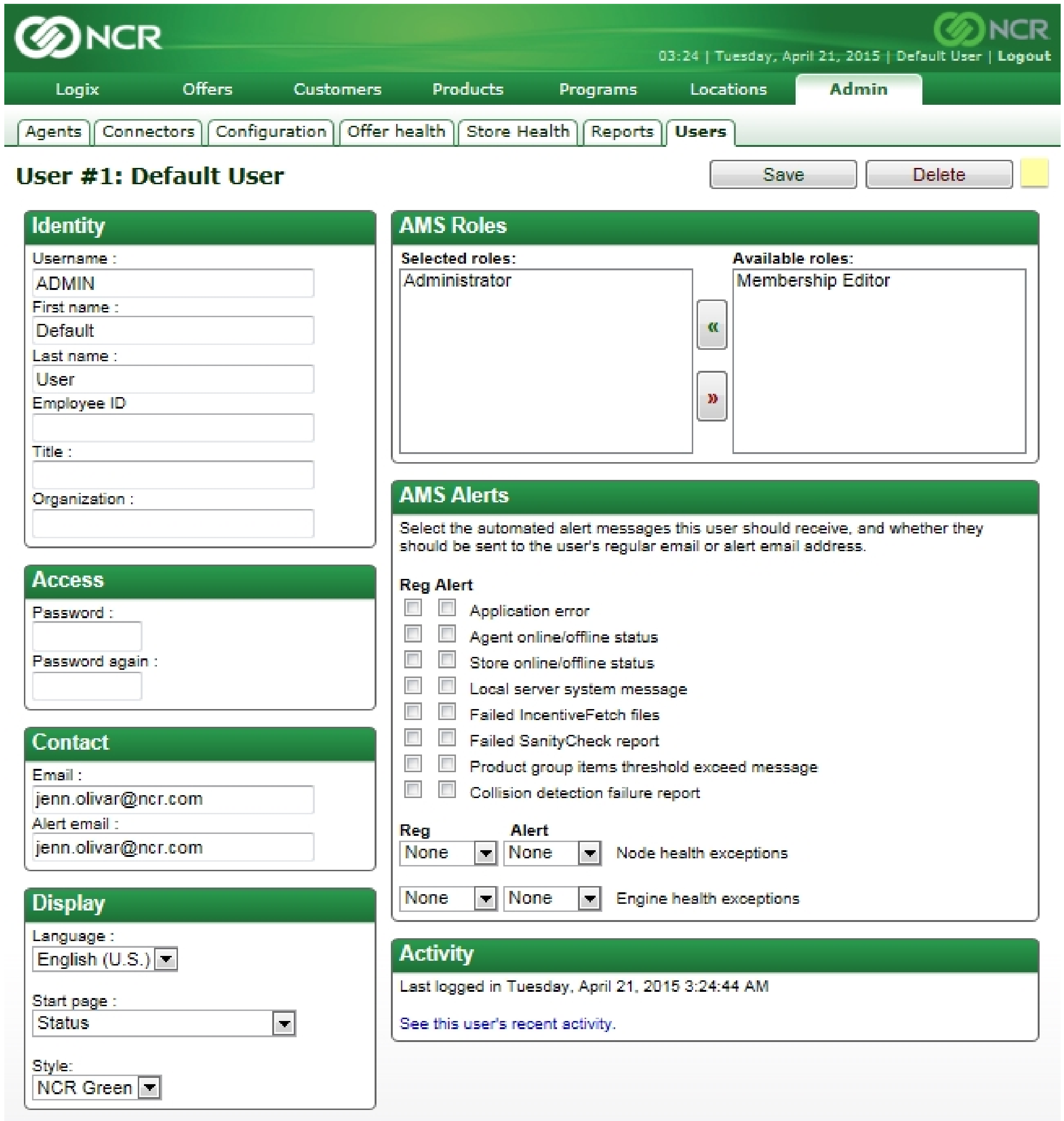
1. Log on to Logix. The default page is displayed.
2. From the Admin tab, select the **Users** page tab. The Users page is displayed.

Note: By default, the users list is sorted by User ID, in a descending order. To change the order, select the ID column heading.

The Users page displays the following information:

- User ID
- Username
- First and last names
- Roles currently associated with users
- Last activity performed by users

3. Select a user name to access or modify user settings. The User Configuration page is displayed.



The User Configuration page displays the following sections:

Section	Description
Identity	Displays personal details of the user.
Access	Permits users to enter and confirm the password used to access the Logix application.
Contact	Used to enter user's primary email address and the alert email address where alert messages are sent.

Section	Description
	Note: The Alert email address can also be the primary email address, or it can be left empty if users do not want to receive alerts.
Display	Sets the following details: • **Language**—sets the language used to display all text in the Logix interface. **Note:** User–created content is not translated. • **Start page**—sets the first page that is displayed after logging in. • **Style**—sets the stylesheet used for the Logix UI.
AMS Roles	Displays a list of available roles. For more information, refer to *Permissions* on page 839.
AMS Alerts	Indicates the alerts that users receive, and sets whether the alerts are sent to the primary email address or to the alert email address.
Activity	Provides a link to a list of the user's most recent activities.

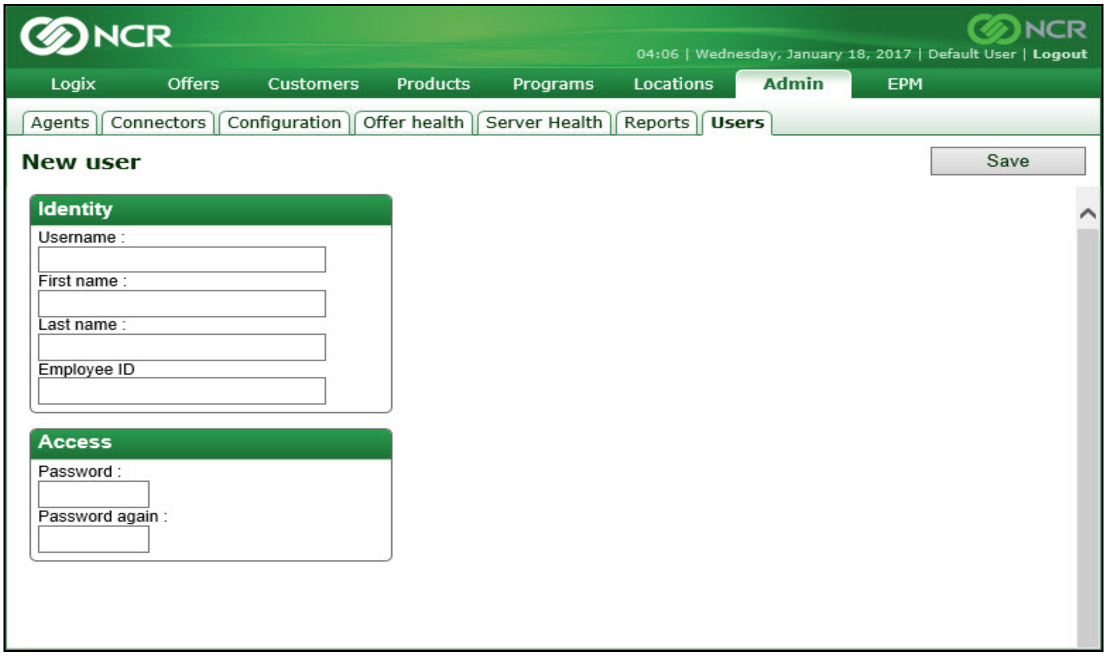
From the Users page, do any of the following:

- Update the user account. For more information, refer to *Updating User Accounts* on page 575.
- Associate users with a role. For more information, refer to *Associating Users with Roles* on page 580.
- Set email alerts. For more information, refer to *Setting Email Alerts* on page 582.
- View user activities. For more information, refer to *Viewing User Activities* on page 585.

Creating User Accounts

To create user accounts, follow these steps:

1. From the Users page, select **New**. The New User page is displayed.



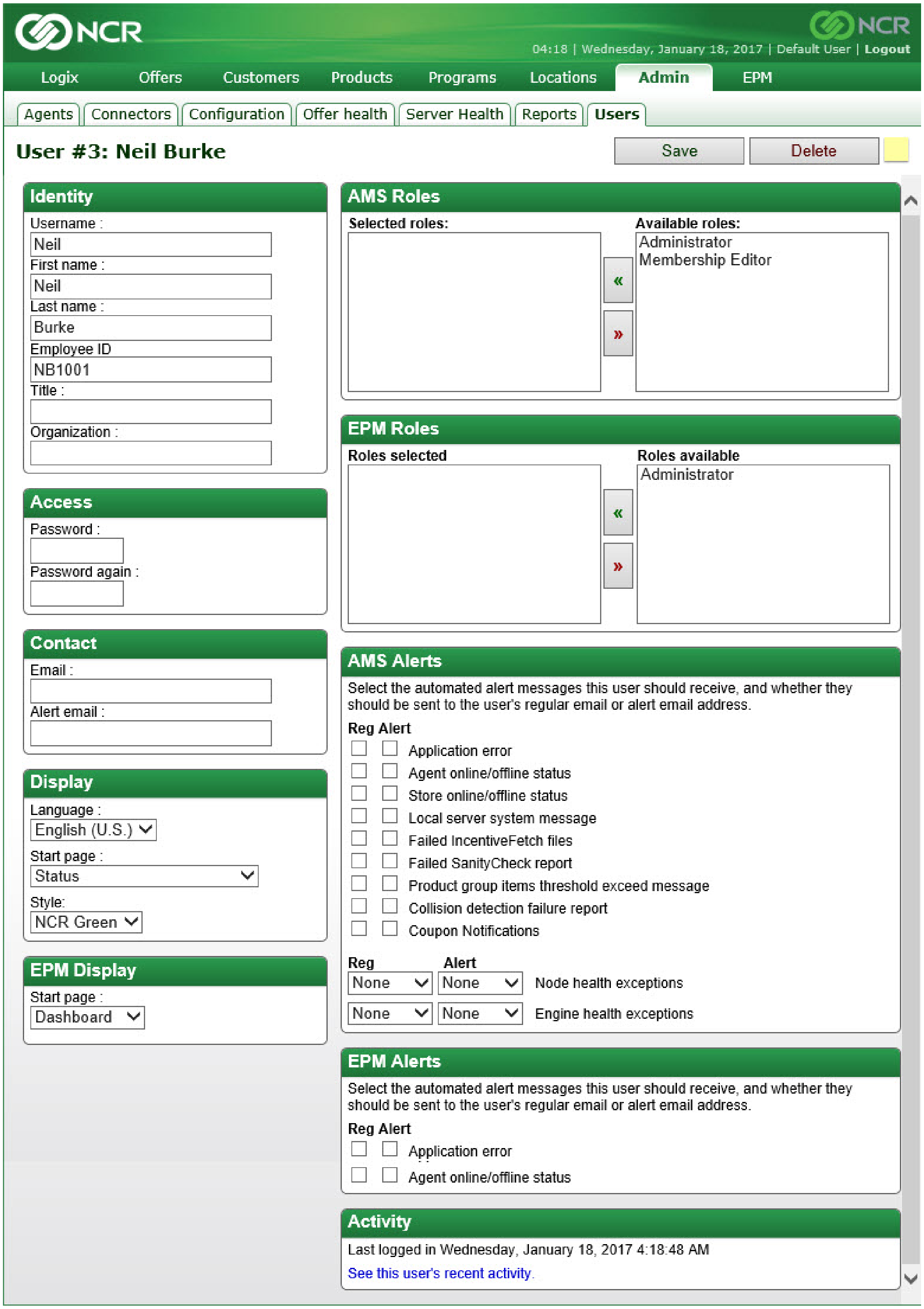
2. Enter the following data:

Section	Data
Identity	• Username • First name • Last name • Employee ID
Access	Password **Note:** Re–enter the password in the *Password again* field.

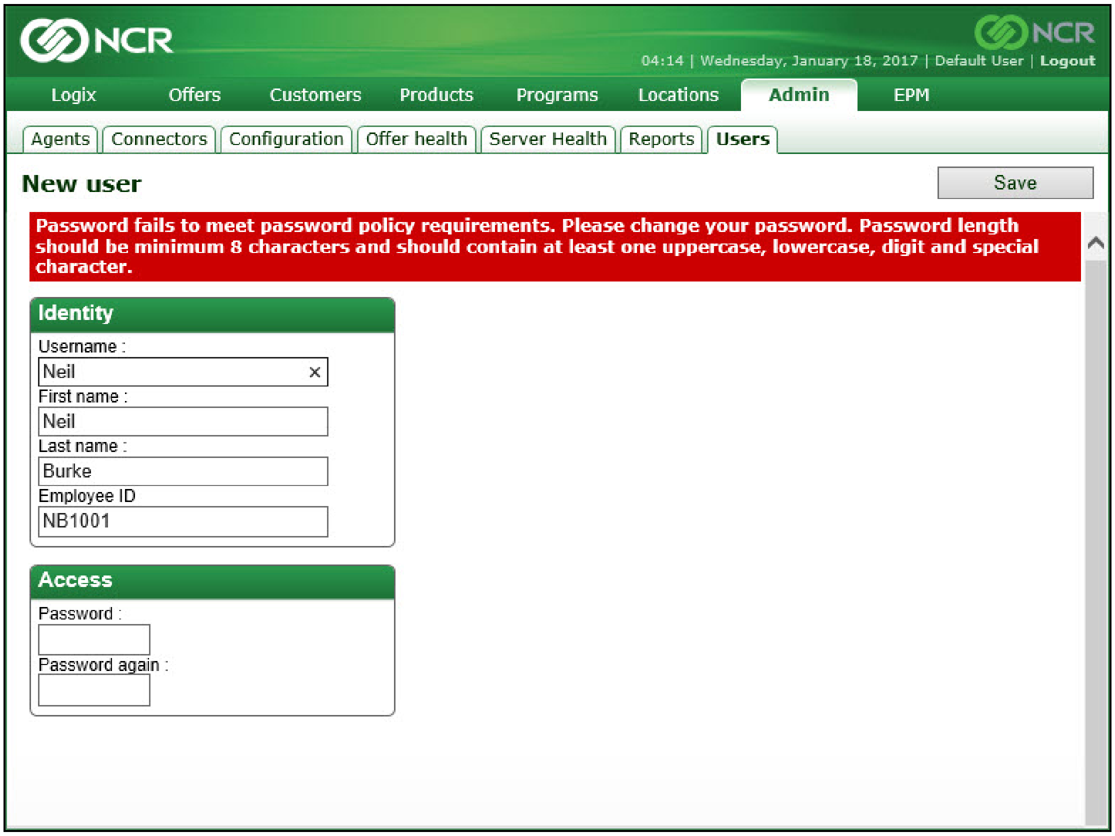
Note: Make sure to enter a valid password. A valid user account password must have all of the following characteristics:

- It should contain a minimum length of 8 characters.
- It should contain at least one of each of the following:
  - Upper–case letter
  - Lower–case letter
  - Special character
  - Numeric character

3. Select **Save**. If password entered is valid, the User Configuration page is displayed with the user account details.



Note: If the password entered is invalid, the system displays an error message.

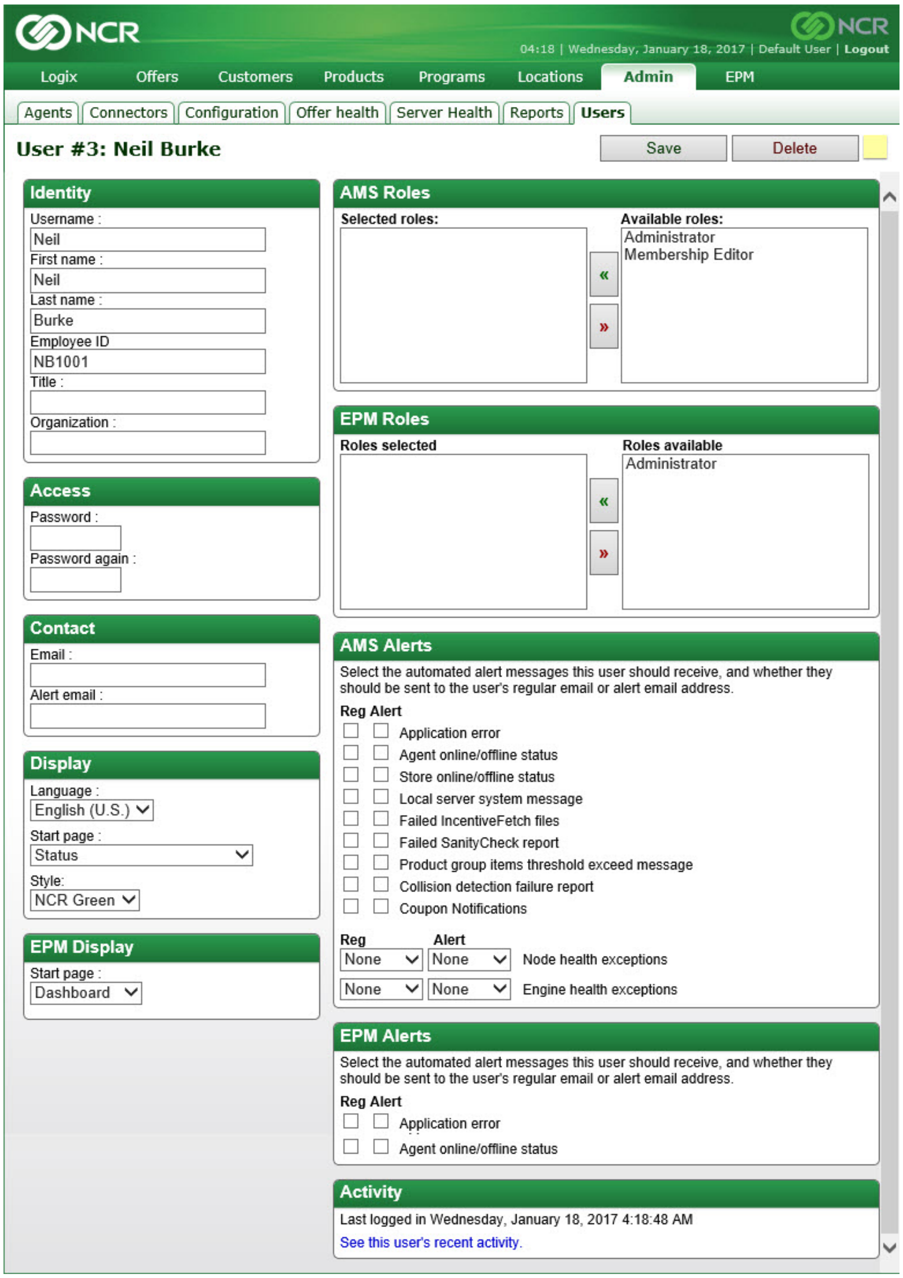


4. If the password entered is invalid, enter and then confirm a valid **Password**, and then select **Save**.
5. In the User Configuration page, do any of the following:
   - Associate user with a role. For more information, refer to Associating Users with Roles on page 580.
   - Set email alerts. For more information, refer to Setting Email Alerts on page 582.
   - View user activities. For more information, refer to Viewing User Activities on page 585.

Updating User Accounts

To update user accounts, follow these steps:

1. From the Users page, select a user name. The corresponding User Configuration page is displayed.



2. Update the data in the corresponding fields.

3. Select **Save** to apply the changes.

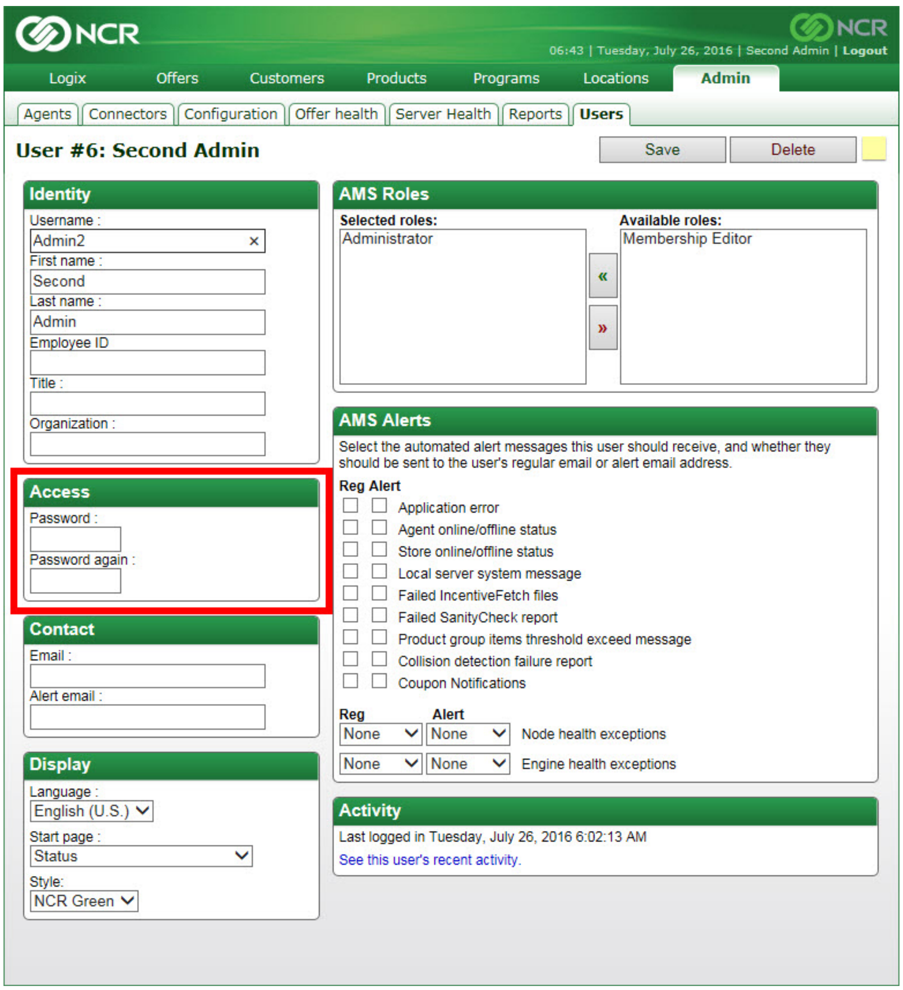
Changing the User Account Password

A user account password in Logix must have all of the following characteristics:

- It should contain a minimum length of 8 characters.
- It should contain at least one each of the following:
  - Upper–case letter
  - Lower–case letter
  - Special character
  - Numeric character

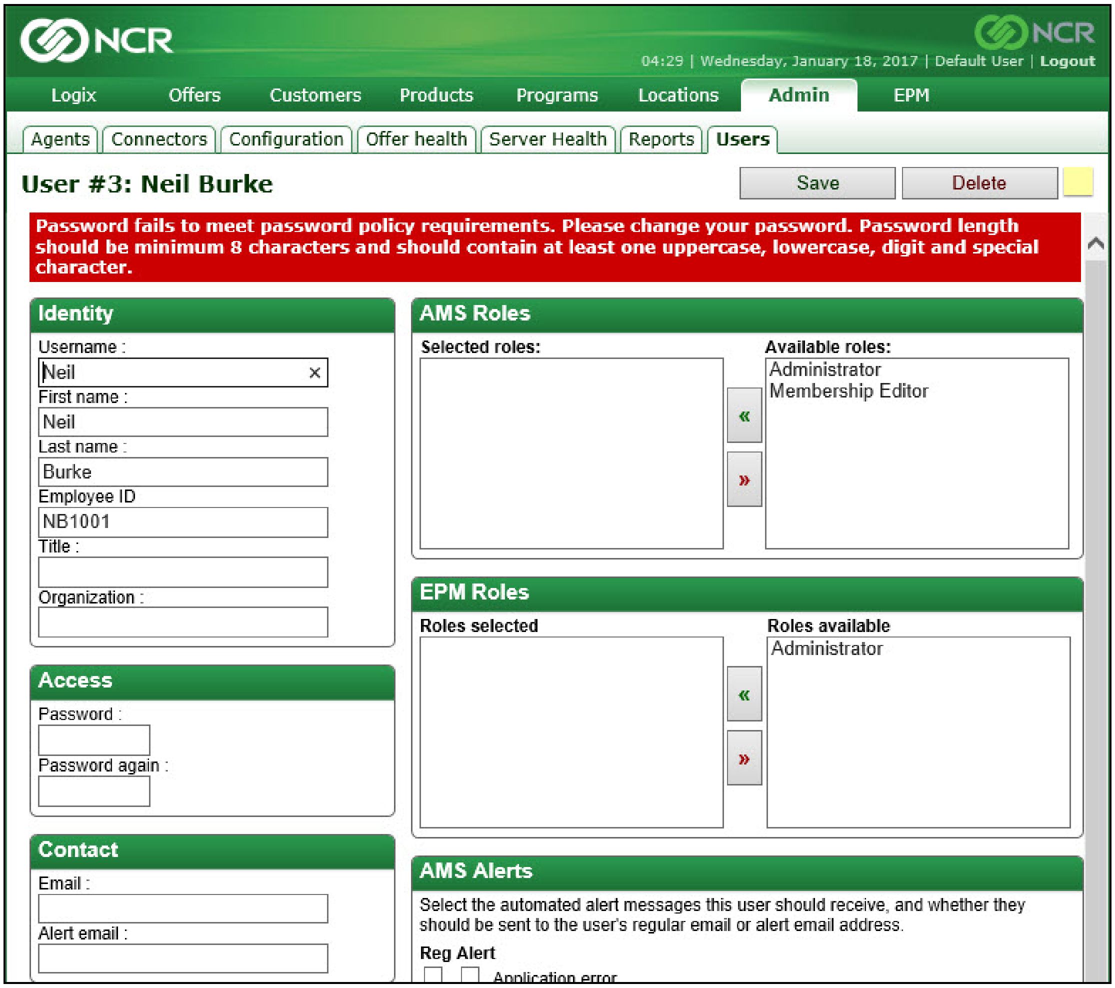
The user account password may be changed in the User Configuration page. To change a user account password, follow these steps:

1. From the User Configuration page, locate the **Access** section.



2. Enter the new **Password**, and then confirm the new password in the *Password again* field.

3. Select **Save**. If the new password is valid, it is saved in the system. Otherwise, the following message is displayed:



If the password entered is invalid, enter and confirm a valid password and then select **Save**.

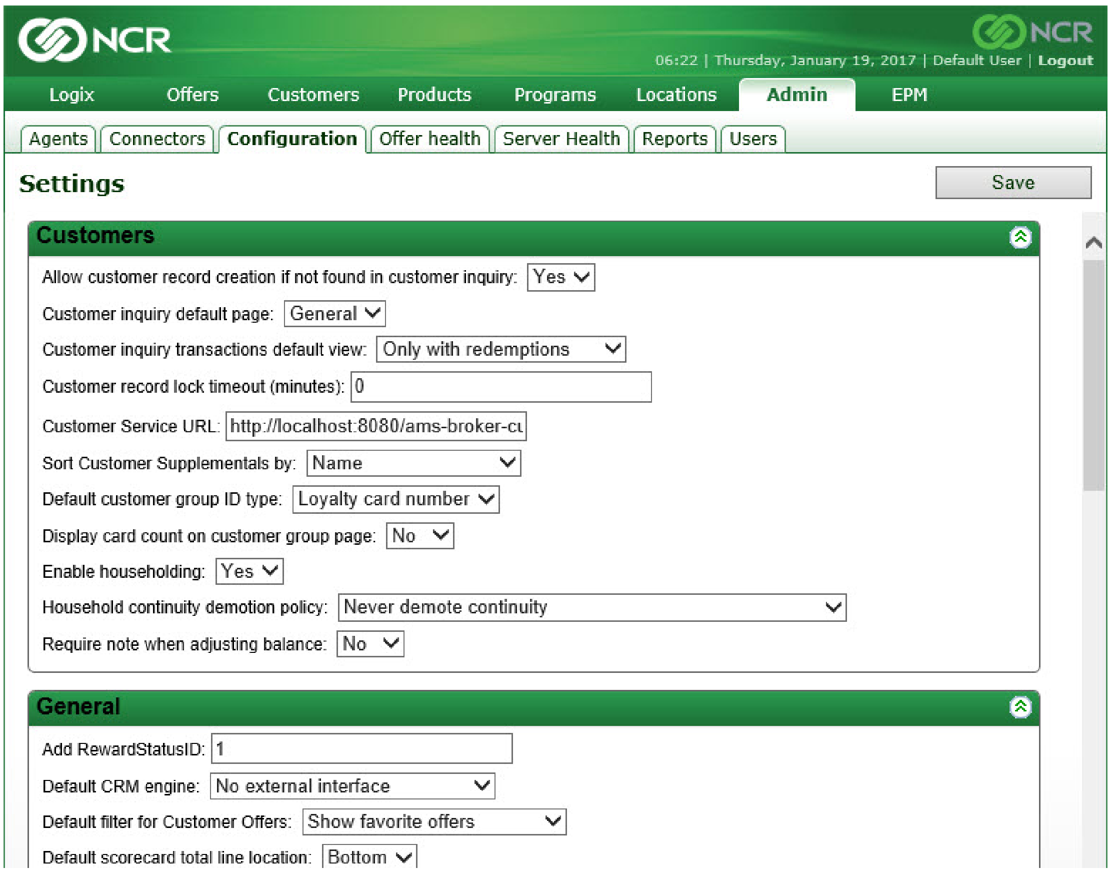
Note: Retailers can set the user account passwords to expire after a configurable number of days. For more information, refer to *Setting up Password Expiry* on the next page.

Setting up Password Expiry

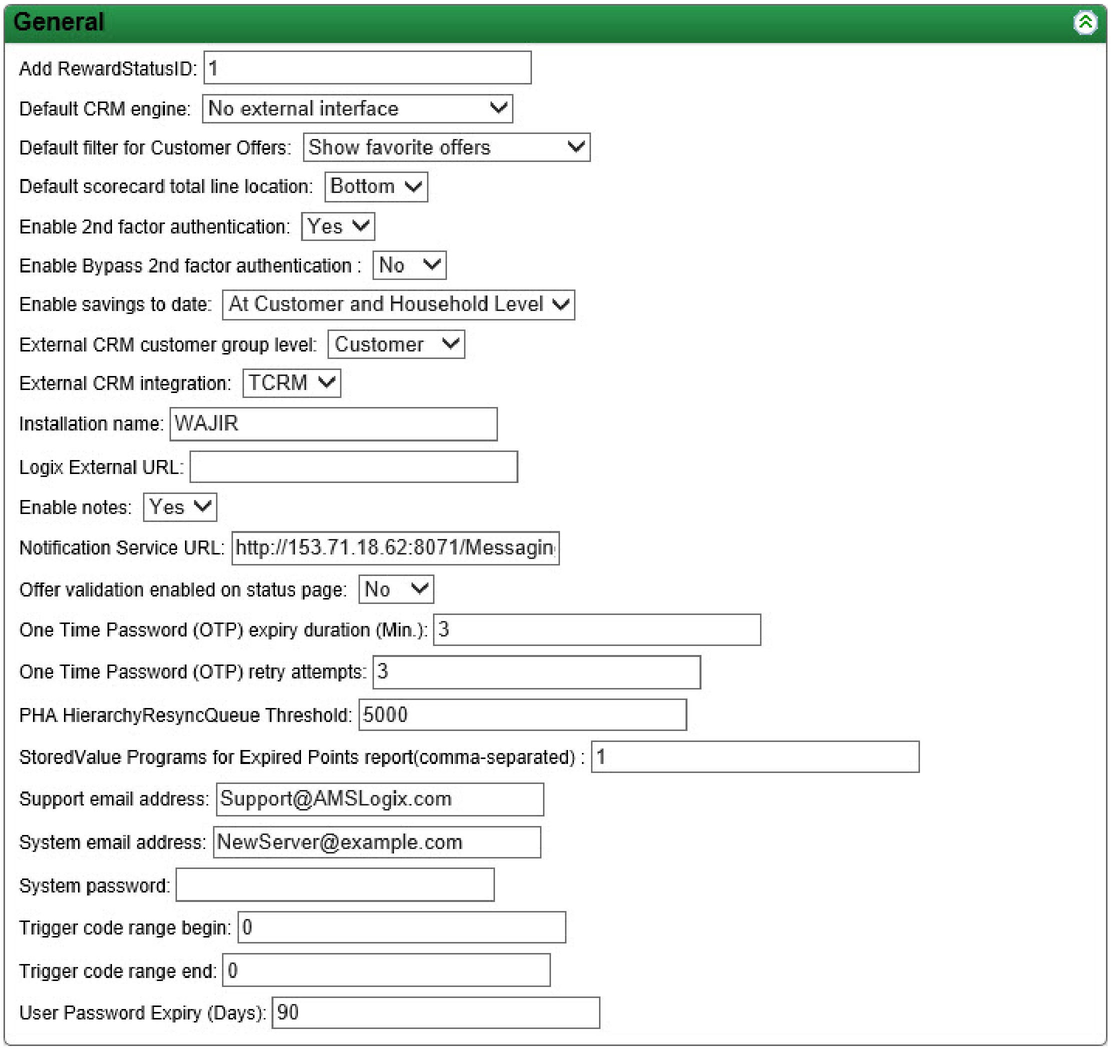
Retailers can set user account passwords to expire after a configurable number of days. If a password expires, the user must enter a new and valid password during logon to successfully log on to Logix. The new password is automatically saved in the user's account settings.

To set the password expiry, follow these steps:

1. In Logix, select **Admin→Configuration→Settings**. The Settings page is displayed.



2. Scroll down to the **General** section.

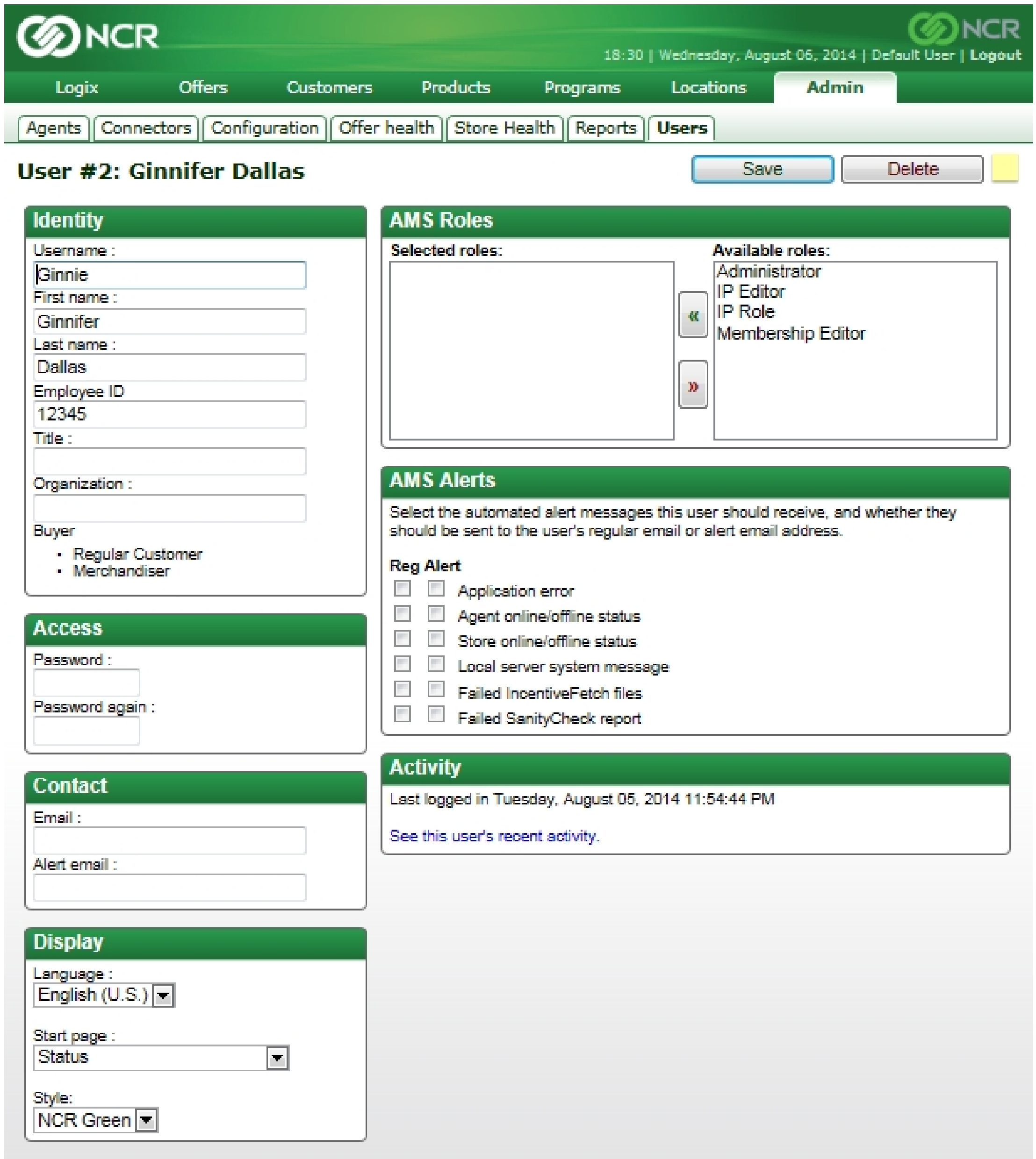


3. In the **User Password Expiry (Days)** setting, enter the number of days for the validity of the user account passwords.
4. Select **Save**.

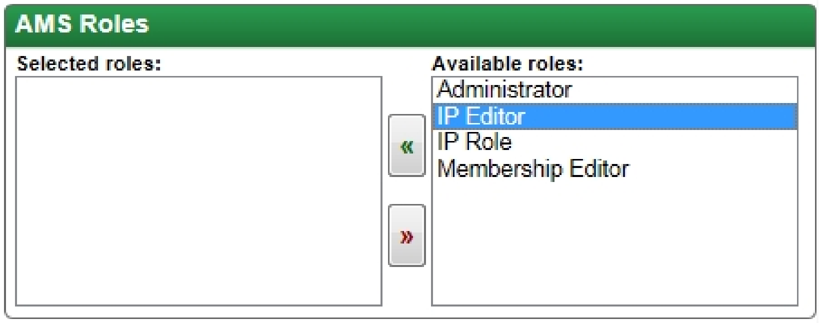
Associating Users with Roles

To associate users with roles, follow these steps:

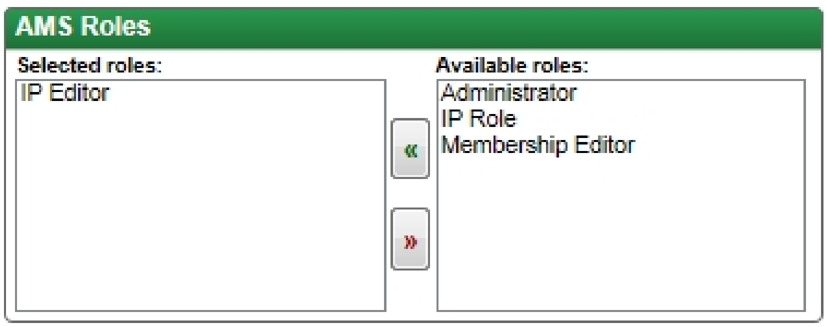
1. From the Users page, select a user name. The corresponding User Configuration page is displayed, as shown in the following example:



2. In the AMS Roles section, highlight a role from the Available roles box.



3. Select the green **chevron** button. The role is moved to the Selected roles box.



4. Select **Save**. To update role settings, refer to *Configuring Role Permissions* on page 567.

Setting Email Alerts

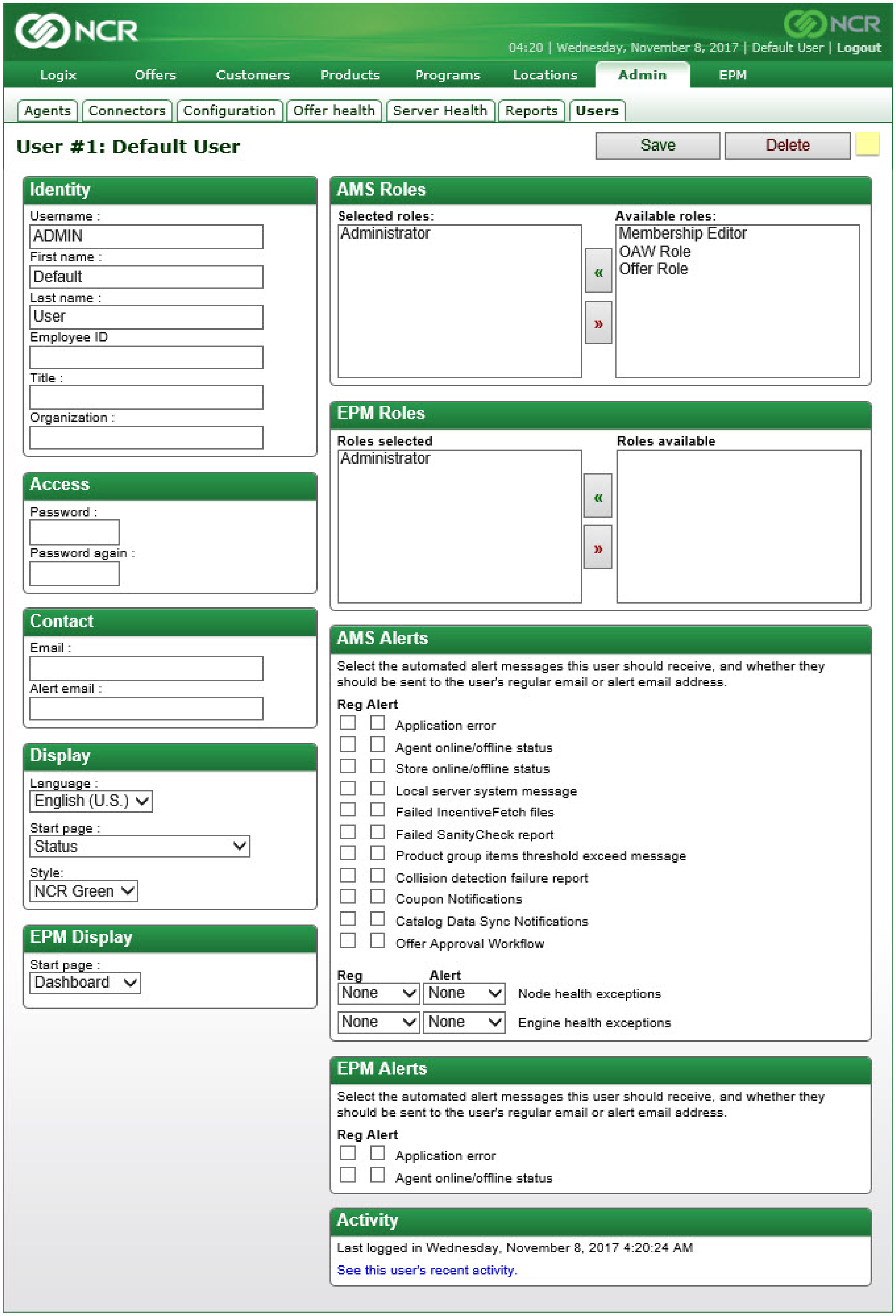
Before setting email alerts, contact an NCR Professional Services Representative to configure the following settings in the SMTP server:

- **Mailbox user**
- **Password**
- **Server**
- **Support email address**

To set email alerts, follow these steps:

1. From the Admin tab, select the **Users** page tab. The Users page is displayed.

2. From the Users page, select a user name. The corresponding User Configuration page is displayed, as shown in the following example:

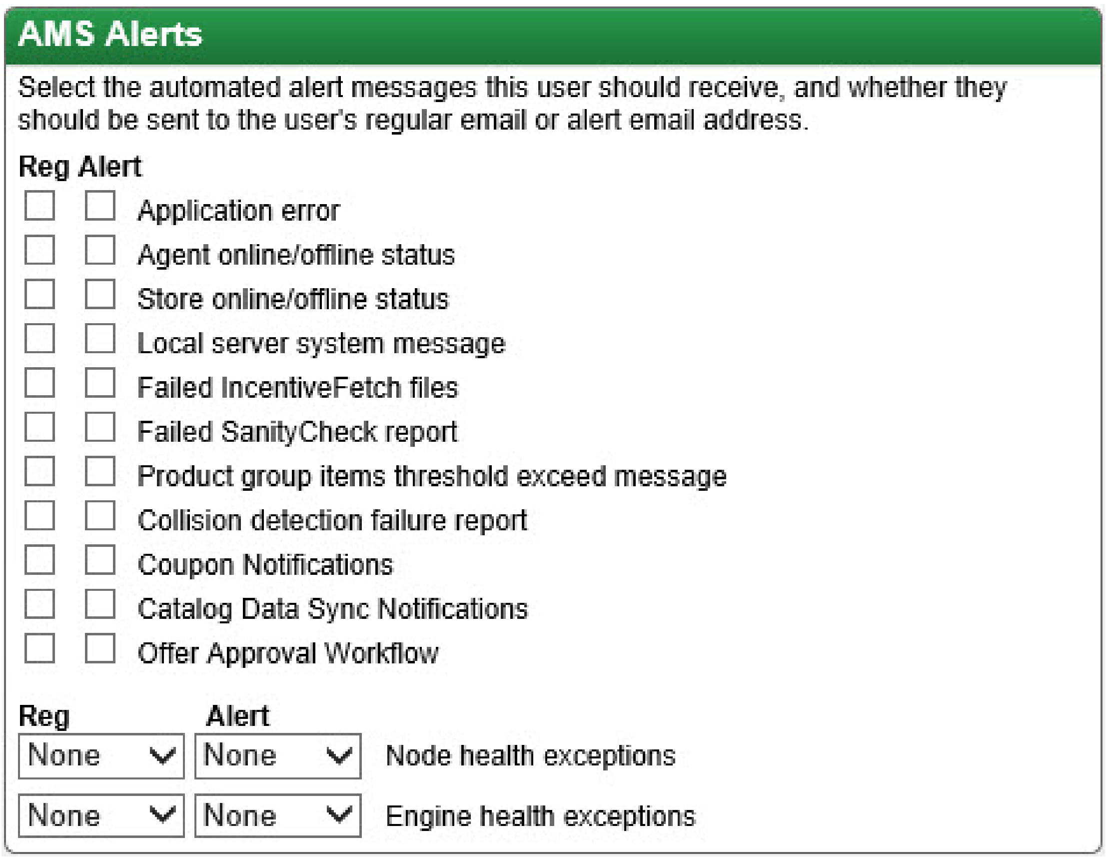


Note: Ensure that the Support email address is also configured in the General Options of the System Settings. To access this option, refer to *Accessing System Settings* on page 710.

3. In the Contact section, enter the primary email address and the alert email address where alert messages are sent.

Note: The Alert email address can also be the primary email address, or it can be left empty if users do not want to receive alerts.

4. In the AMS Alerts section, select the corresponding check box of an automated alert message.



Alert messages can be set to either of the following:

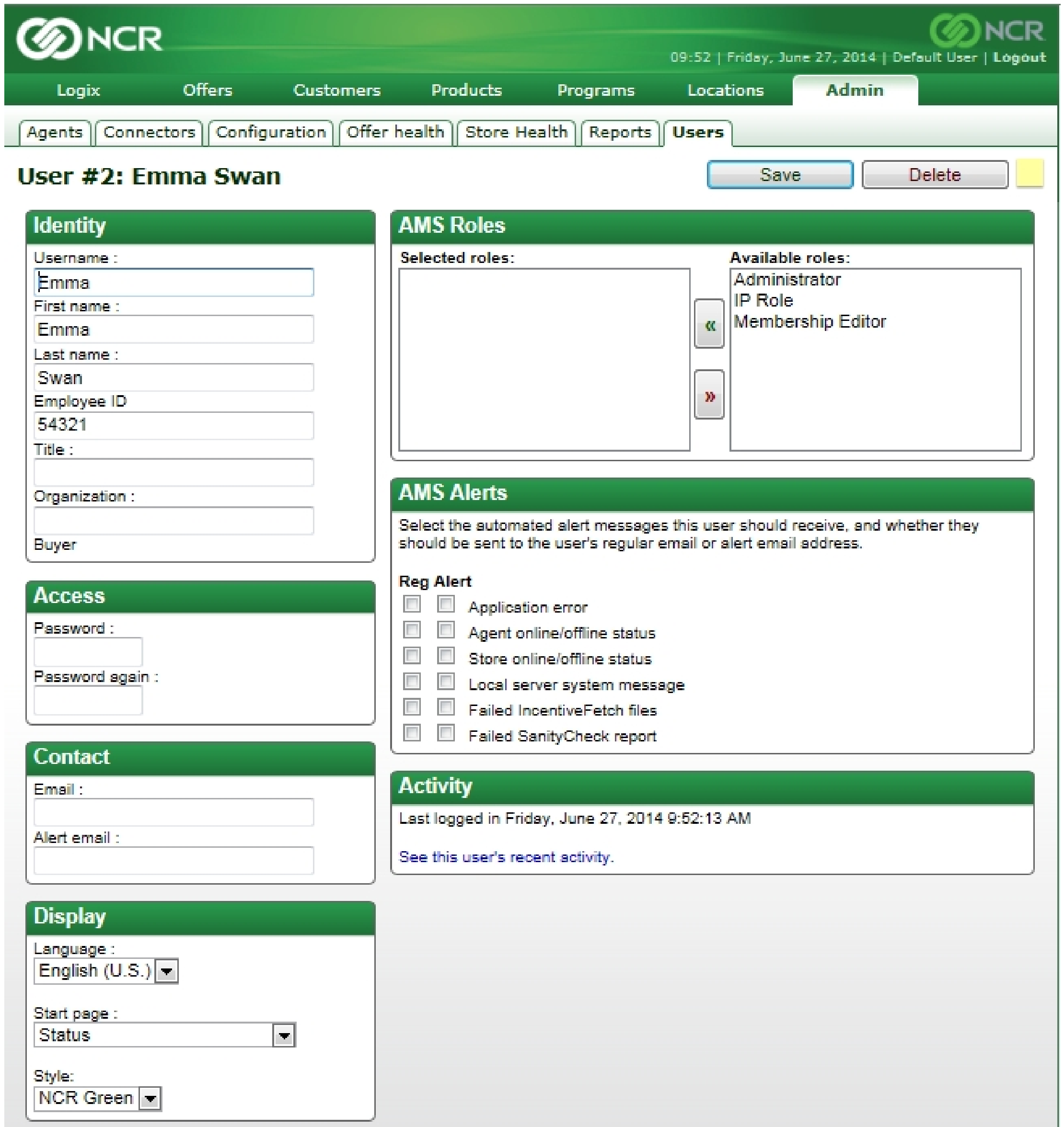
- **Reg**—sends the message to the indicated primary email address.
- **Alert**—sends the message to the indicated alert email address.

5. Select the alert level for local server health exceptions:
   - **High**
   - **Medium**
   - **Low**
6. Select **Save**.

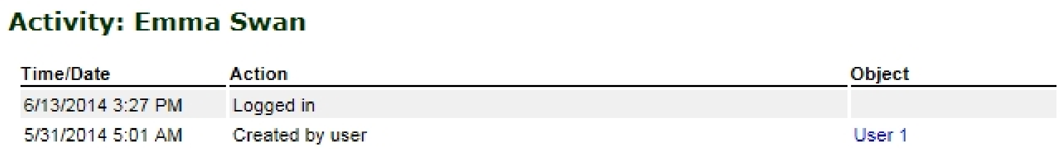
Viewing User Activities

To view user activities, follow these steps:

1. From the Admin tab, select the **Users** page tab. The Users page is displayed.
2. Select a username. The corresponding User Configuration page is displayed, as shown in the following example:



3. In the Activity section, select the **See this user's recent activity** link. A pop–up window displays the user's activities as shown in the following example:



Deleting User Accounts

To delete user accounts, follow these steps:

1. From the Admin tab, select the **Users** page tab. The Users page is displayed.
2. Select a username. The corresponding User Configuration page is displayed.
3. Select **Delete**. A confirmation window is displayed.
4. Select **OK**.

Second Factor Authentication

Retailers can set up Logix to further authenticate the users who log on to the system. If the second factor authentication is enabled, users must associate their accounts with a valid email address. When logging on to the system, the user must enter the OTP, which is a six–digit numeric code sent to the email address, to successfully log on to Logix.

The OTP expires in a configured number of minutes, and becomes invalid after three unsuccessful attempts. However, users may request for a new OTP from the system.

Note: When enabled, the second factor authentication applies to all users regardless of their roles.

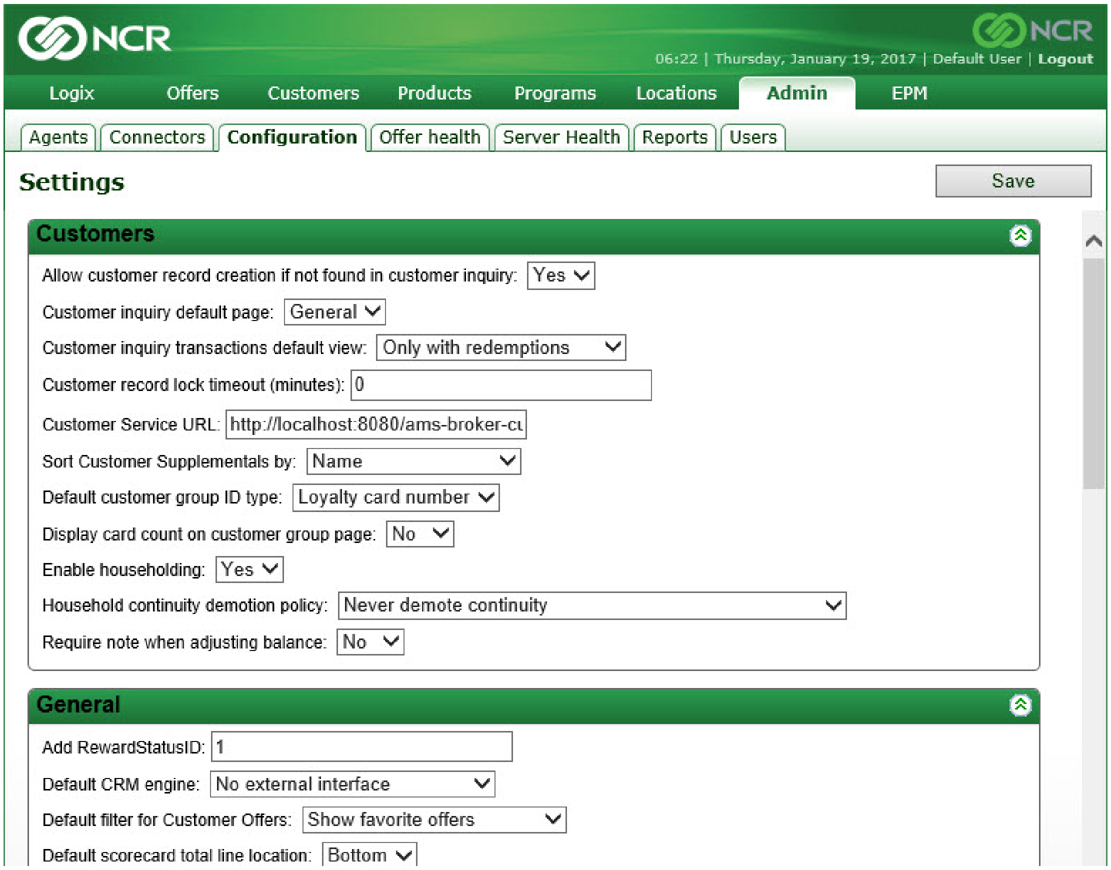
Setting up the second factor authentication involves the following Logix settings:

- Enable 2nd factor Authentication
- Enable Bypass 2nd factor authentication
- One Time Password (OTP) expiry duration (Min.)
- One Time Password (OTP) retry attempts

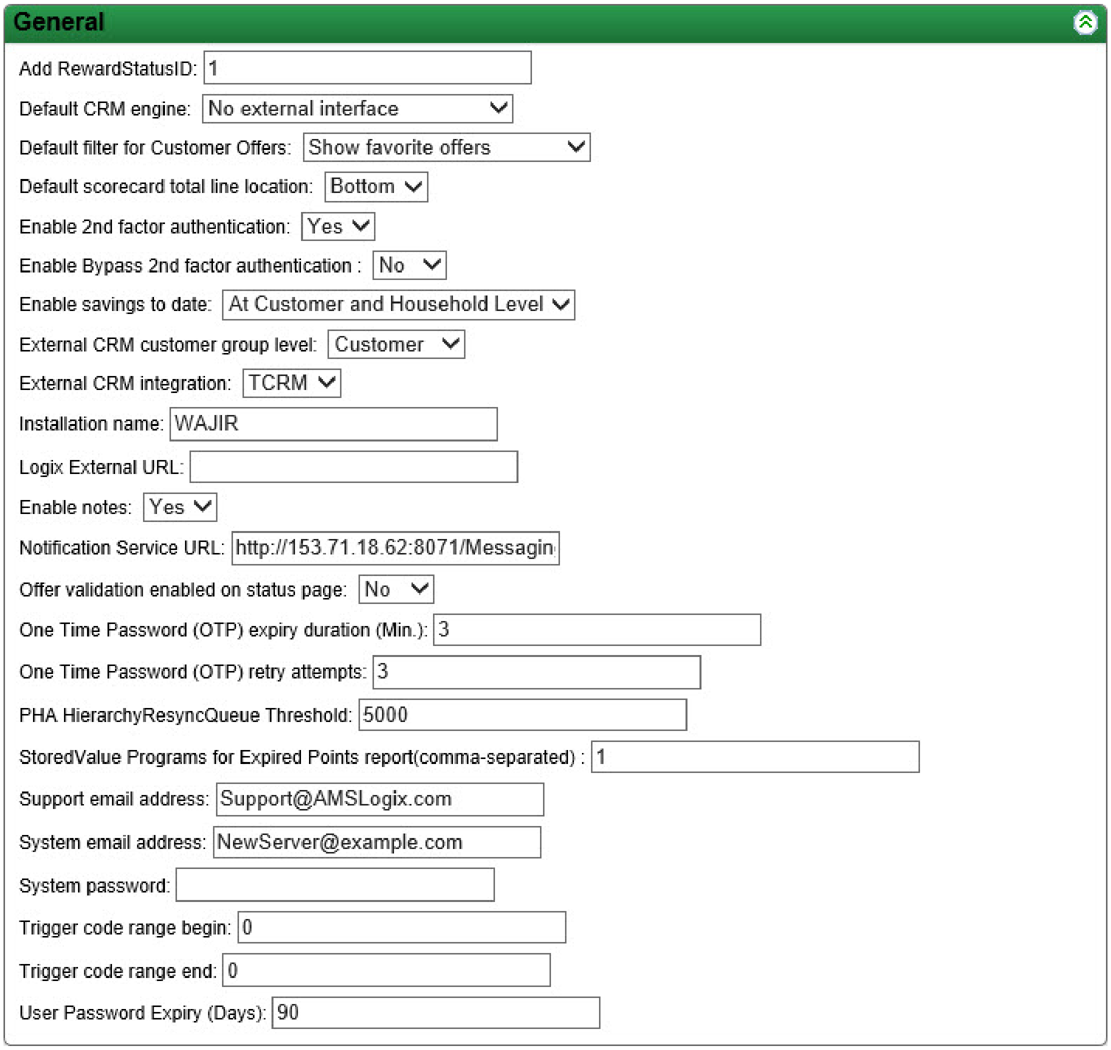
Enabling the Second Factor Authentication

To enable the second factor authentication, follow these steps:

1. In Logix, select **Admin→Configuration→Settings**. The Settings page is displayed.



2. Scroll down to the **General** section.



3. In the **Enable 2nd factor authentication** setting, select **Yes**.
4. Select **Save**.

Setting up the OTP

The One–Time Password (OTP) is a six–digit numeric code. When the user logs on to Logix, the system generates the OTP and sends it to the user's configured email address.

The OTP becomes invalid for the following reasons:

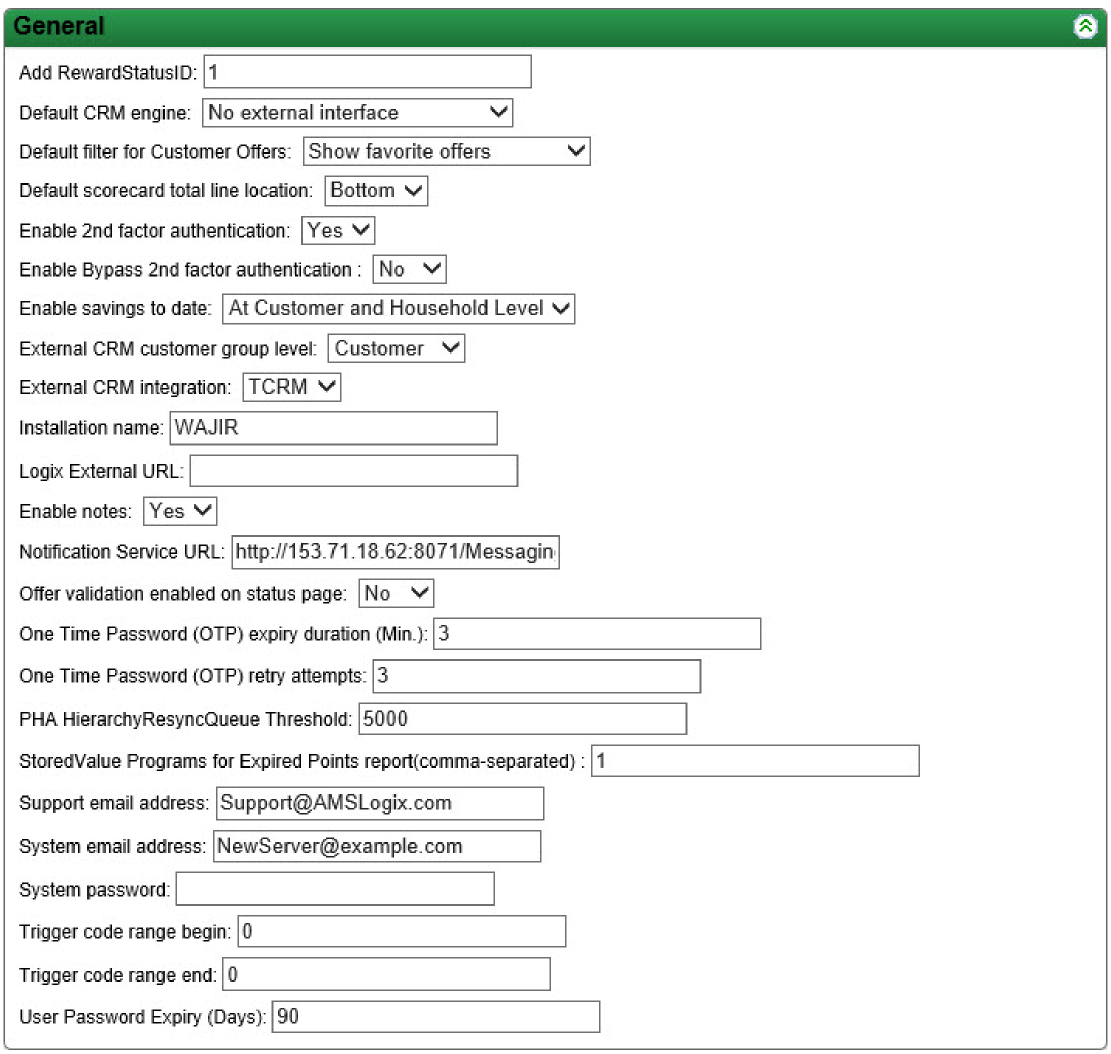
- The OTP has expired.
- The user entered the incorrect OTP for a maximum number of times.

If the OTP becomes invalid, users must request for a new OTP. For more information, refer to *Logging On to Logix with Enabled Authentication* on page 14.

Note: The OTP validity works in systems where Logix and EPM are in integrated mode. When the user is unable to log in to EPM due to an expired or an invalid OTP, the user should not be able to consequently log in to Logix using the same expired or invalid OTP.

To set up the OTP, follow these steps:

1. In the Logix Settings page, scroll down to the **General** section.


General
Add RewardStatusID: 1
Default CRM engine: No external interface
Default filter for Customer Offers: Show favorite offers
Default scorecard total line location: Bottom
Enable 2nd factor authentication: Yes
Enable Bypass 2nd factor authentication : No
Enable savings to date: At Customer and Household Level
External CRM customer group level: Customer
External CRM integration: TCRM
Installation name: WAJIR
Logix External URL:
Enable notes: Yes
Notification Service URL: http://153.71.18.62:8071/Messagin
Offer validation enabled on status page: No
One Time Password (OTP) expiry duration (Min.): 3
One Time Password (OTP) retry attempts: 3
PHA HierarchyResyncQueue Threshold: 5000
StoredValue Programs for Expired Points report(comma-separated) : 1
Support email address: Support@AMSLogix.com
System email address: NewServer@example.com
System password:
Trigger code range begin: 0
Trigger code range end: 0
User Password Expiry (Days): 90

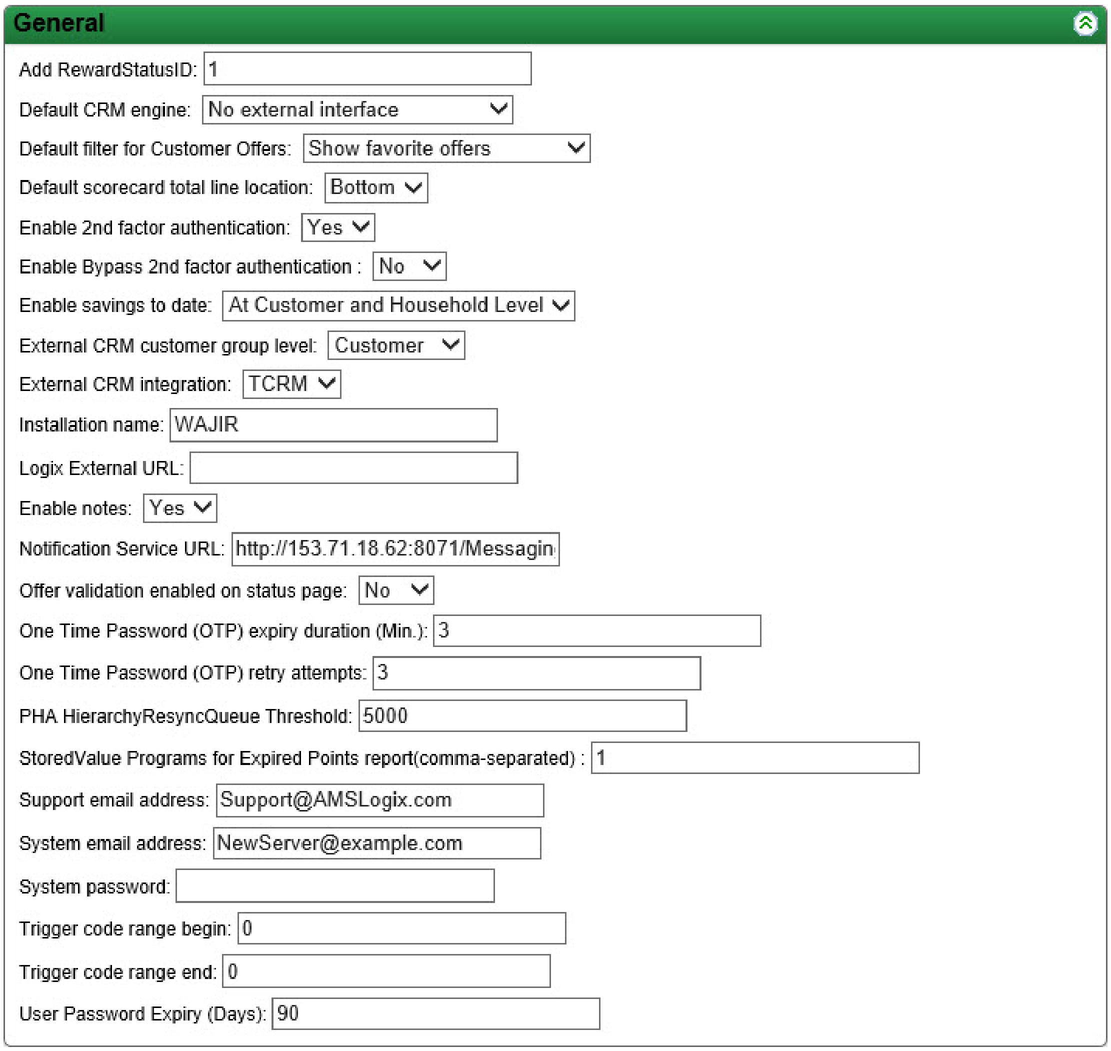
2. Configure the following settings:
   - **One Time Password (OTP) expiry duration (Min.)**—indicates the number of minutes until the OTP expires. The default value is 3 minutes.
   - **One Time Password (OTP) retry attempts**—indicates the number of times that the user is allowed to enter the OTP unsuccessfully before it becomes invalid. The default value is 3 times.
3. Select **Save**.

Bypassing the Second Factor Authentication

If the second factor authentication is enabled, retailers can configure the Logix system to allow users to skip the authentication, provided that the user has completed at least one successful logon using the second factor authentication.

To configure the system to bypass the second factor authentication, follow these steps:

1. In the Logix Settings page, scroll down to the **General** section.

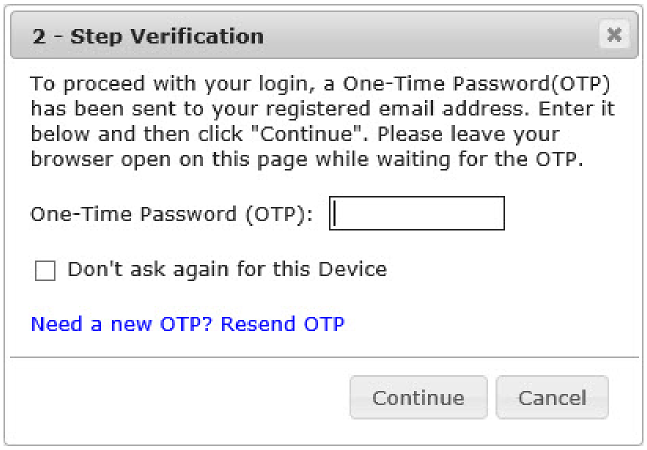


2. In the **Enable Bypass 2nd factor authenticaton** setting, select **Yes**.
3. Select **Save**.

If the *Enable Bypass 2nd factor authentication* setting is set to *Yes*, the user can skip the authentication only after all of these conditions are met:

- The user has logged on to the system using the second factor authentication at least once.

- The user selects the **Don't ask again for this Device** check box in the authentication window.



Note: Users who choose to skip the second factor authentication for a particular device should be able to log on using only their account user name and password regardless of where they use that device (for example, at home or at work). In this case, a **device** refers to a single Web browser on a computer, on a tablet, or on a mobile phone. If the user attempts to log on from a different browser on the same computer, tablet, or mobile phone, the user must go through the second factor authentication for that browser, with the option to skip it the next time the user logs on.

Chapter 10: Using Administrative Functions

Overview

The Admin tab displays a set of pages and tools that are used to perform administrative tasks and functions. This chapter provides instructions on how to use these functions including the following:

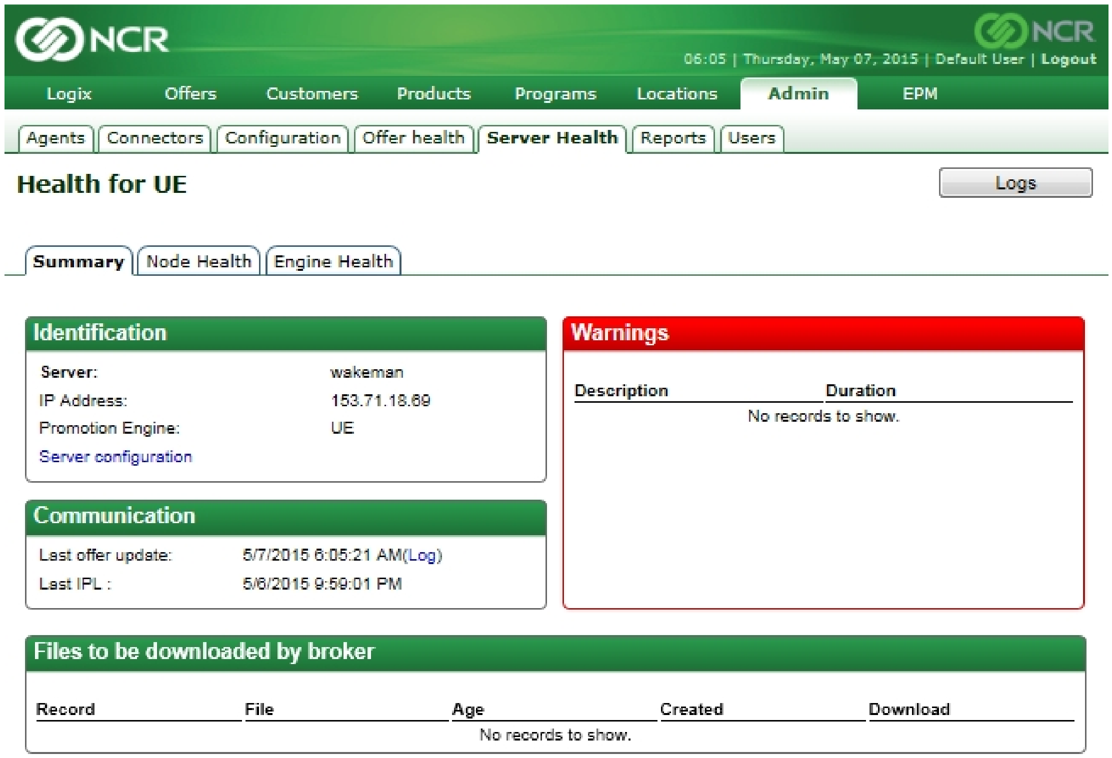
- Managing user permissions and access rights using role–based system settings
- Configuring system health alerts
- Allowing help desks or customer service representatives to access and manage customer account data

Note: To configure system settings, refer to *Configuring Settings* on page 709.

Accessing Administrative Functions

To access administrative functions, follow these steps:

1. Log on to Logix. The default page is displayed.
2. Select the **Admin** tab. The application displays the Store Health page by default.



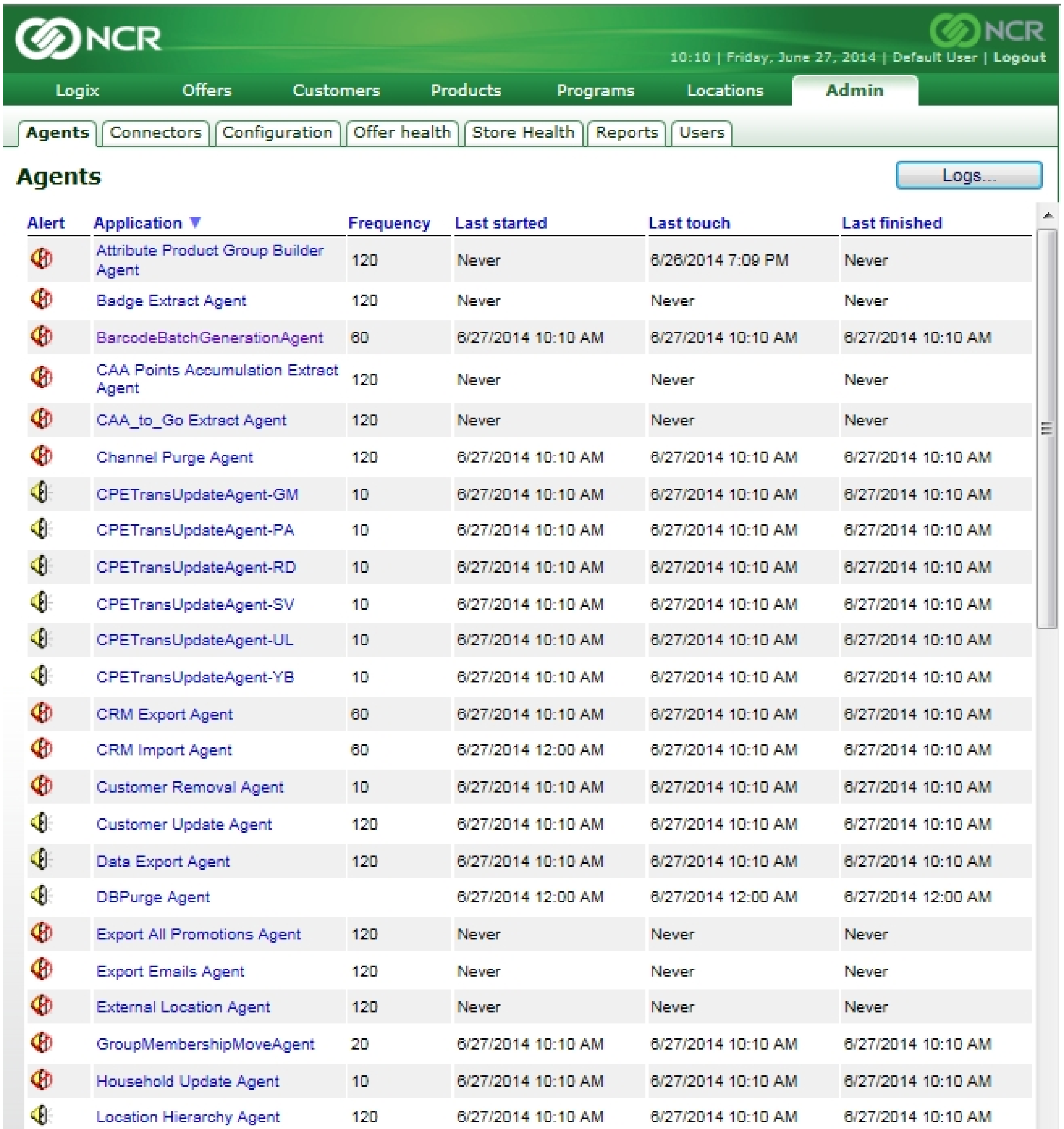
3. Select any of the following page tabs to access an administrative function:

Page Tab	Description
Agents	Displays a list of agents that are performing specialized functions. For more information, refer to *Agents* on page 789.
Connectors	Displays connectors or web service files (Active Server Method files or ASMXs) that are accessed using HTTP. These files have one or more operations that usually emulate functionality in the Logix UI. For more information, refer to *Connectors* on page 602.
Configuration	Displays buttons that correspond with configuration items, which cannot be controlled by non–administrative users. Configuration items appear throughout the Logix UI; they are choices available in various selectors. For more information, refer to *Configuration* on page 610.

Page Tab	Description
Offer Health	Displays a Summary of offers statuses in Logix particularly those that are identified as potentially problematic. The data displayed for each offer is based on deployment validation. For more information, refer to *Offer Health* on page 671.
Server Health	Displays server–related and performance–related information about the enterprise server components. For more information, refer to *Server Health* on page 676.
Reports	Permits users to create reports about the performance of an offer. For more information, refer to *Generating Performance Reports* on page 701.
Users	Permits users to perform administrative tasks such as creating and modifying user accounts. For more information, refer to *Users* on page 568.

Agents

From the Admin main tab, select the **Agents** page tab to access the Agents page.



Alert	Application ▼	Frequency	Last started	Last touch	Last finished
	Attribute Product Group Builder Agent	120	Never	6/26/2014 7:09 PM	Never
	Badge Extract Agent	120	Never	Never	Never
	BarcodeBatchGenerationAgent	60	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	CAA Points Accumulation Extract Agent	120	Never	Never	Never
	CAA_to_Go Extract Agent	120	Never	Never	Never
	Channel Purge Agent	120	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	CPETransUpdateAgent-GM	10	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	CPETransUpdateAgent-PA	10	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	CPETransUpdateAgent-RD	10	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	CPETransUpdateAgent-SV	10	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	CPETransUpdateAgent-UL	10	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	CPETransUpdateAgent-YB	10	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	CRM Export Agent	60	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	CRM Import Agent	60	6/27/2014 12:00 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	Customer Removal Agent	10	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	Customer Update Agent	120	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	Data Export Agent	120	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	DBPurge Agent		6/27/2014 12:00 AM	6/27/2014 12:00 AM	6/27/2014 12:00 AM
	Export All Promotions Agent	120	Never	Never	Never
	Export Emails Agent	120	Never	Never	Never
	External Location Agent	120	Never	Never	Never
	GroupMembershipMoveAgent	20	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	Household Update Agent	10	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM
	Location Hierarchy Agent	120	6/27/2014 10:10 AM	6/27/2014 10:10 AM	6/27/2014 10:10 AM

The Agents page displays the following details:

Column Heading	Description
Alert	Indicates whether the application sends email alerts when it encounters a problem. For more information, refer to *Setting Email Alerts* on page 582. **Note:** Applications with problems are highlighted in red.
Application	Indicates the agent that performed a specialized function. For more information, refer to *Agents* on page 789.
Frequency	Indicates the interval period during which agents perform their operations. The value is expressed in seconds.
Last started	Indicates the date and time when the scheduled process was last started. **Note:** This is not the date and time when the process was last launched.
Last touch	Indicates the updated date and time showing that the process is still running. This is useful for time–consuming tasks.
Last Finished	Indicates the date and time when the scheduled process was last completed.

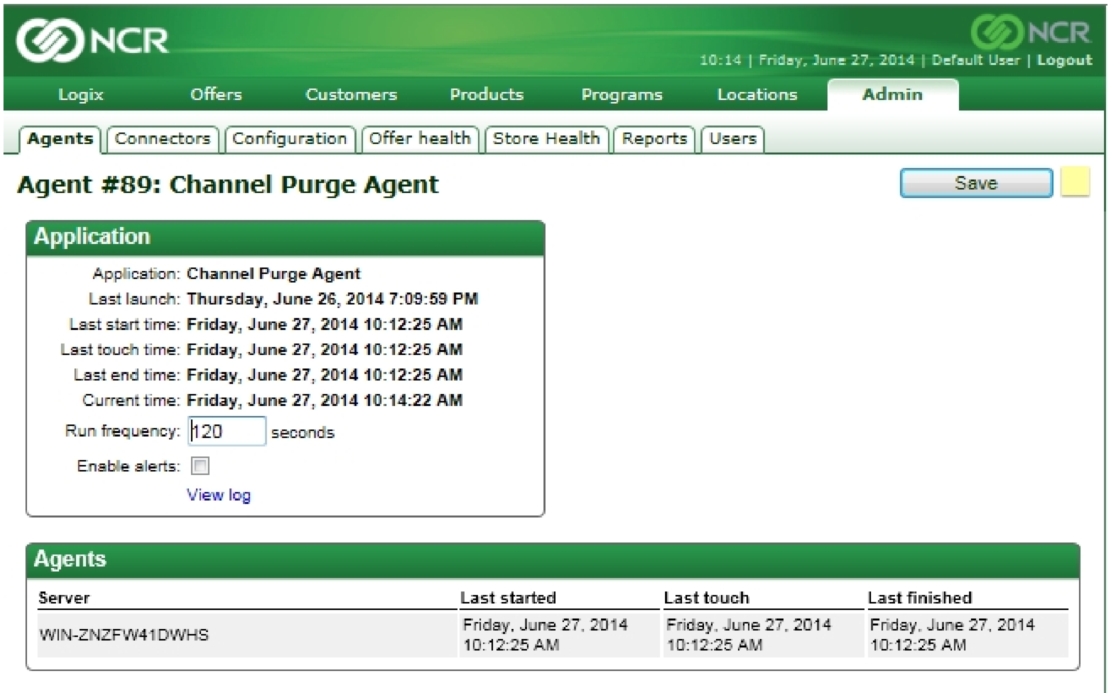
From the Agents page, do any of the following:

- Modify options of certain Agents. For more information, refer to *Modifying Agent Details* on the next page.
- View Agent log files. To view log files written by Agents while performing their tasks, select the **Logs. . .** button to display the Log File Viewer. For more information, refer to *Log Files* on page 801.

Modifying Agent Details

To modify Agent details, follow these steps:

1. From the Agents page, select an application name. The corresponding Agent details page is displayed as shown in the following example:



Note: Use the Notes icon to create or view notes. For more information, refer to *Using the Notes Function* on page 703.

The Agent details page displays information that may include the following:

Detail	Description
Application	Name of the agent.
Last launch	Indicates the date and time the application was launched.
Last start time	Indicates the date and time the application began its scheduled process.
Last touch time	Indicates the updated date and time showing that a time–consuming process is still running.
Last end time	Indicates the date and time when the scheduled process was last completed.
Current time	Indicates the date and time at the central server.

Detail	Description
Run frequency	Indicates the interval period during which the agent performed its operations.
Enable alerts	If selected, email alerts are sent to users when problems are encountered.
View log	Displays the log files written by the agent while performing its tasks. For more information, refer to *Log Files* on page 801.
Server	Displays the details of activities performed on the agent from a server.

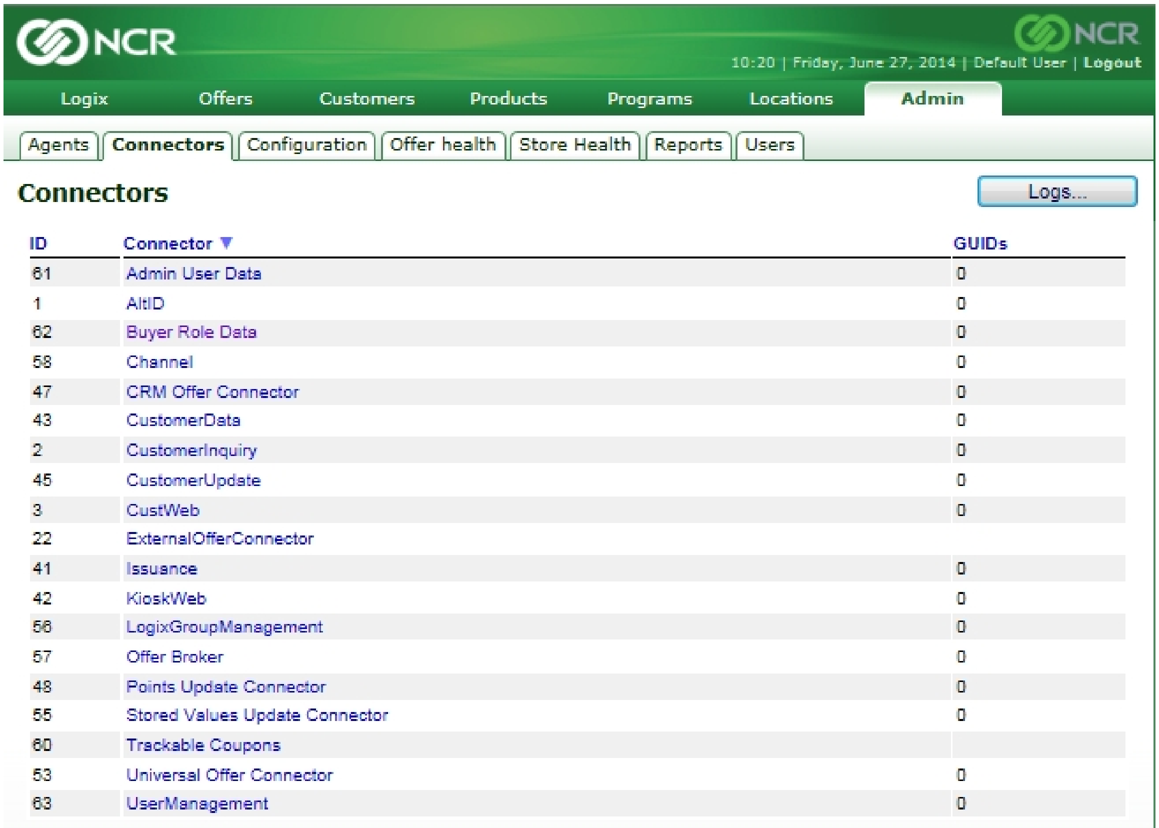
2. Do any of the following:
   - Enter a value in the Run frequency text box.
   - Select the **Enable alerts** check box.

Note: If the Agent contains specific settings, modify the corresponding values when necessary.

3. Select **Save** to apply the changes.

Connectors

From the Admin main tab, select the **Connectors** page tab to access the Connectors page.



The Connectors page displays the following details:

Column Heading	Description
ID	Indicates a Connector Identification number.
Connector	Indicates a web service file that is accessed through HTTP and has one or more operations that usually emulate functionality in the Logix UI. For more information, refer to *Web Service Files* on page 809.
GUIDs	Indicates Globally Unique Identifiers (GUIDs) that have corresponding 32–character hexadecimal codes used as a password. GUIDs are used by some connectors to control access to their operations.

From the Connectors page, do any of the following:

- Modify connector–specific options. For more information, refer to *Modifying Connector Options* on the next page.
- Create GUIDs. For more information, refer to *Creating GUIDs* on page 606.
- Modify GUIDs. For more information, refer to *Modifying GUIDs* on page 608.
- Delete GUIDs. For more information, refer to *Deleting GUIDs* on page 609.
- View Connector log files. To view log files associated with Connectors, select the **Logs. . .** button to display the Log File Viewer. For more information, refer to *Log Files* on page 801.

Connector Options

Some connector operations can be controlled by setting certain connector–specific options. Users can modify the following connectors:

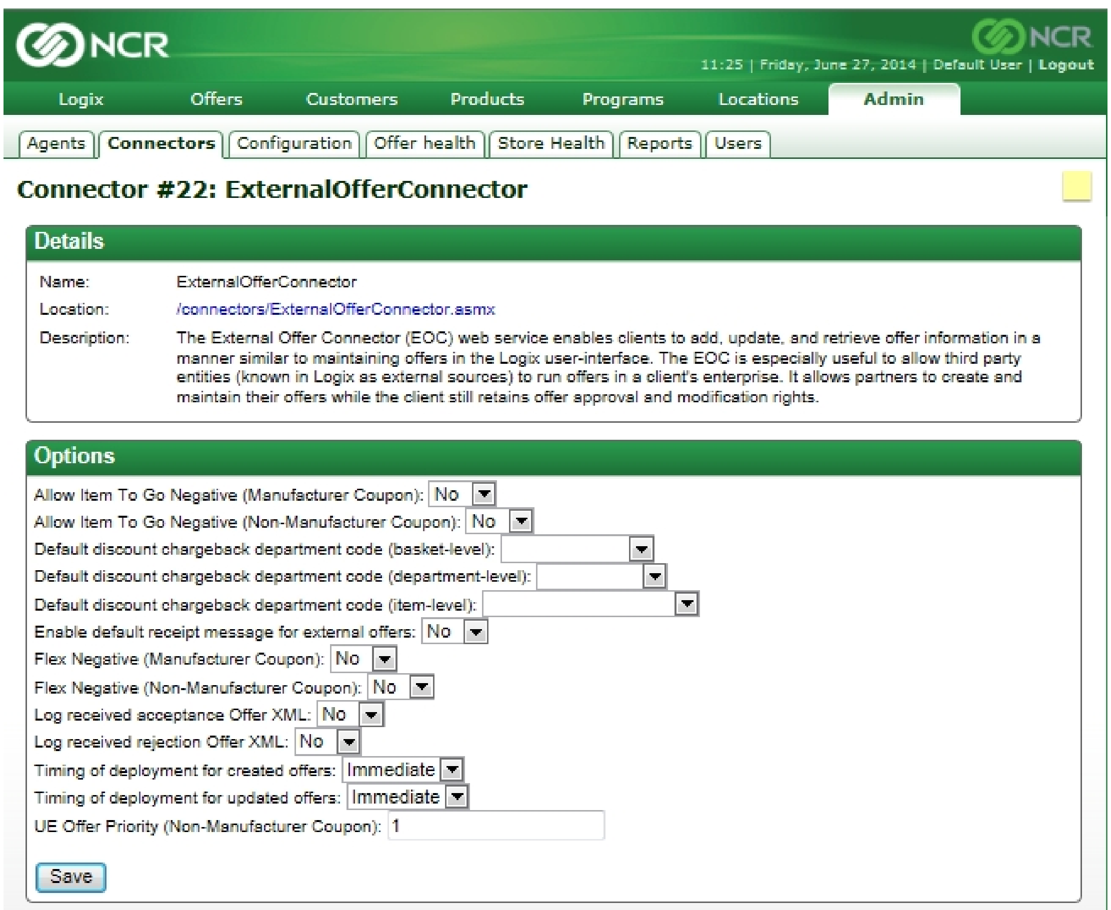
- Channel Connector
- Customer Update Connector
- External Offer Connector
- Logix Group Management Connector
- Phone Home Connector

For more information, refer to *Web Service Files* on page 809.

Modifying Connector Options

To modify connector–specific options, follow these steps:

1. From the Connectors page, select a connector with connector–specific options. The corresponding Connector Details page is displayed, as shown in the following example:

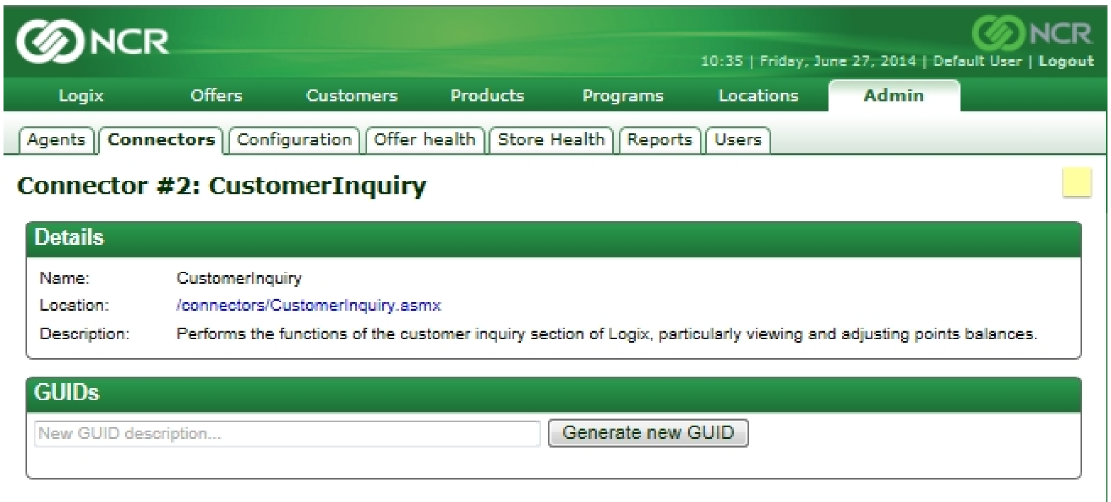


2. Modify the connector options by doing either of the following:
    - Select a value from a drop–down list.
    - Enter a value in the corresponding field.
3. Select **Save** to apply the changes.

Creating GUIDs

Globally Unique Identifiers (GUIDs) have corresponding 32–character hexadecimal codes used as a password. GUIDs are used by some connectors to control access to their operations. To create a GUID, follow these steps:

1. From the Connectors page, select a Connector name. The corresponding Connector details page is displayed as shown in the following example:

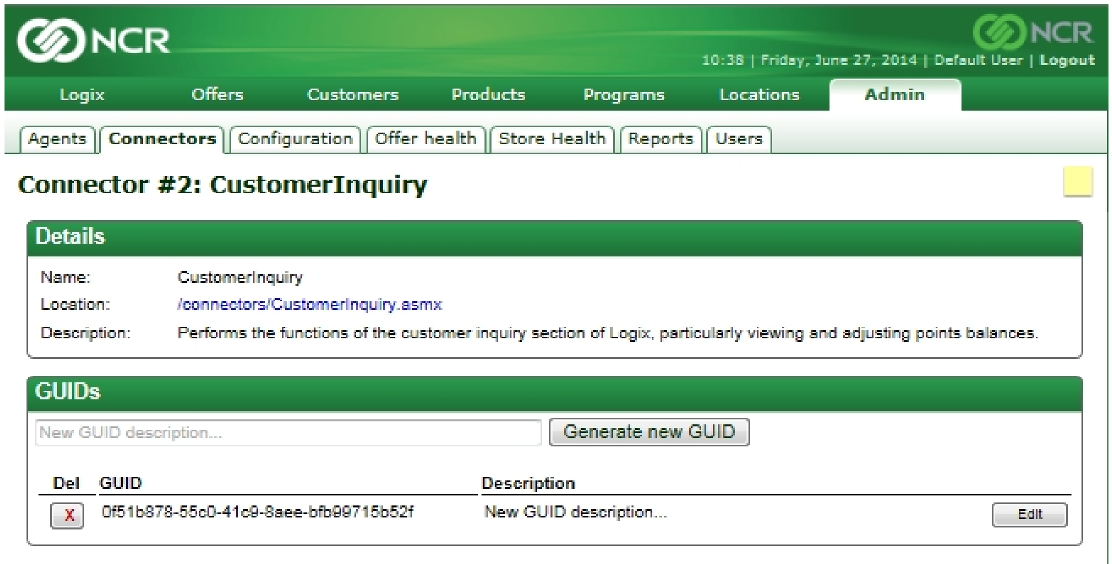


Note: If the connector has existing GUIDs, the Connectors details page displays them in the GUIDs section.

The Connector details section displays the following information:

Detail	Description
Name	Name of the Connector.
Location	Indicates the path on the web server where the connector or the Active Server Method file (ASMX) is saved.
Description	Describes the purpose of the connector.

2. Select the **Generate new GUID** button. The application creates the GUID.

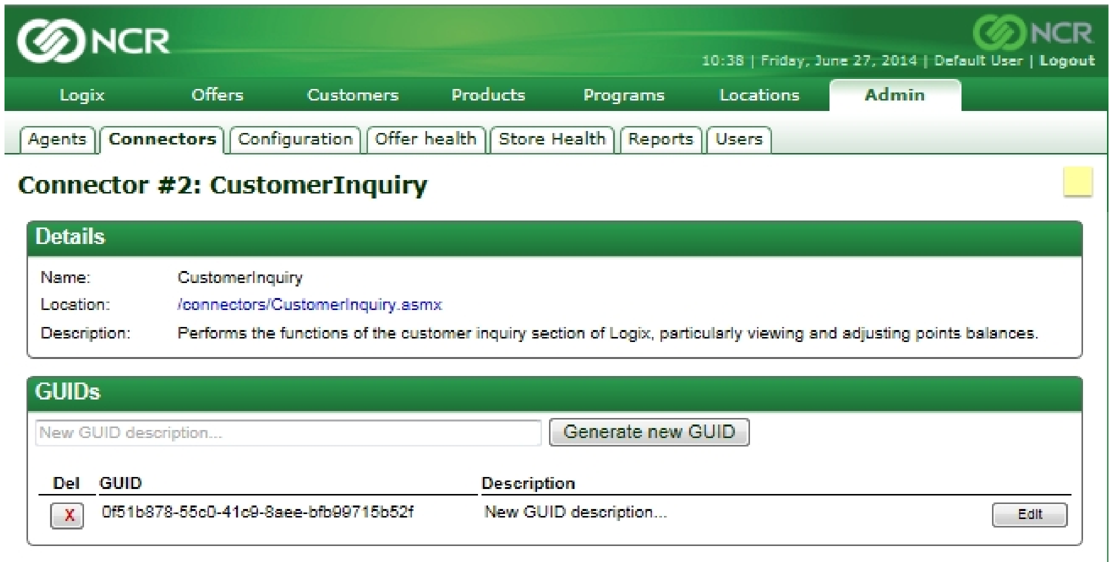


3. Do either of the following:
   - Add or modify the GUID description. For more information, refer to *Modifying GUIDs* on the next page.
   - Delete a GUID. For more information, refer to *Deleting GUIDs* on page 609.

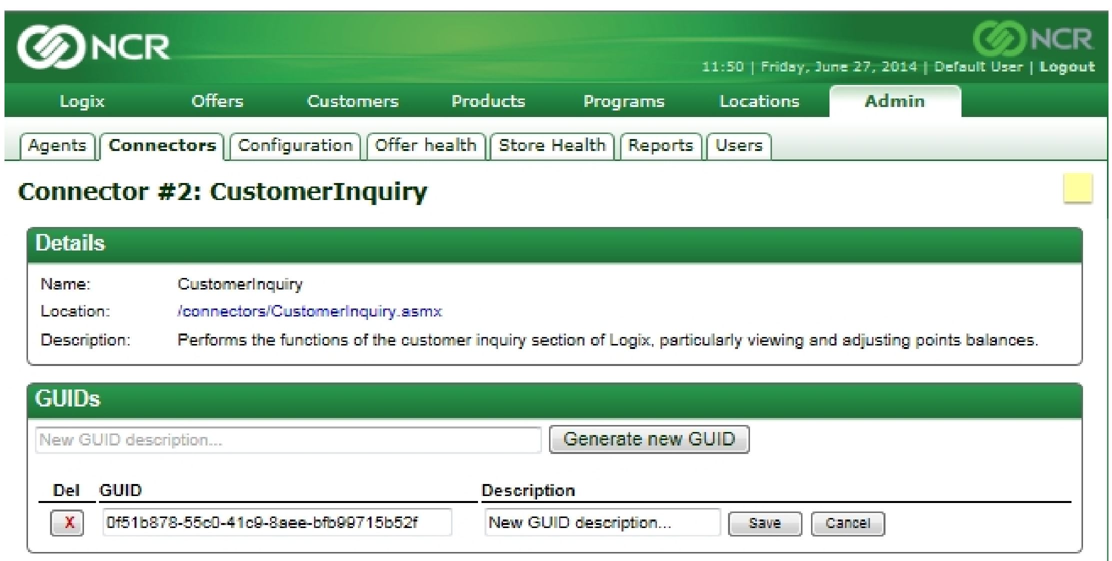
Modifying GUIDs

To modify GUIDs or create corresponding descriptions, follow these steps:

1. From the Connector page, select a connector. The corresponding Connector details page is displayed.



2. From the GUIDs section, select **Edit**. The following page is displayed:

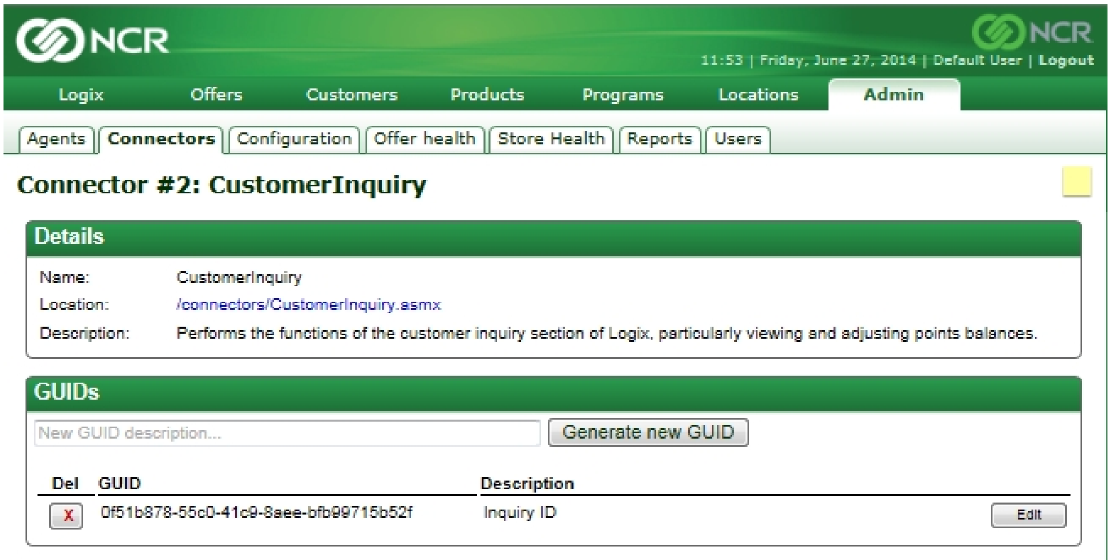


3. Do either of the following:
   - Modify the GUID.
   - Enter a description in the Description field.
4. Select **Save** to apply the changes.

Deleting GUIDs

To delete GUIDs, follow these steps:

1. From the Connectors page, select a Connector name. The application displays the corresponding details as shown in the following example:



2. Select the red **X** button of the corresponding GUID. The application displays a confirmation window.
3. Select **OK**.

Configuration

From the Admin main tab, select the **Configuration** page tab to access the Configuration page.

The Configuration page displays the following Configuration buttons:

Configuration Button	Description
Data exports	Controls the following: • how and when the data is exported from the central server, to where, and in what format. • what data is gathered from local sources and aggregated by the central server. For more information, refer to *Data Exports* on page 614.
Departments	Displays a list of existing departments and the following fields: • **ID**—unique system–generated ID for the department • **Code**—a four–digit department identifier • **Name**—name of the department • **Edited**—date and time of the last edit For more information, refer to *Chargeback Departments* on page 618.

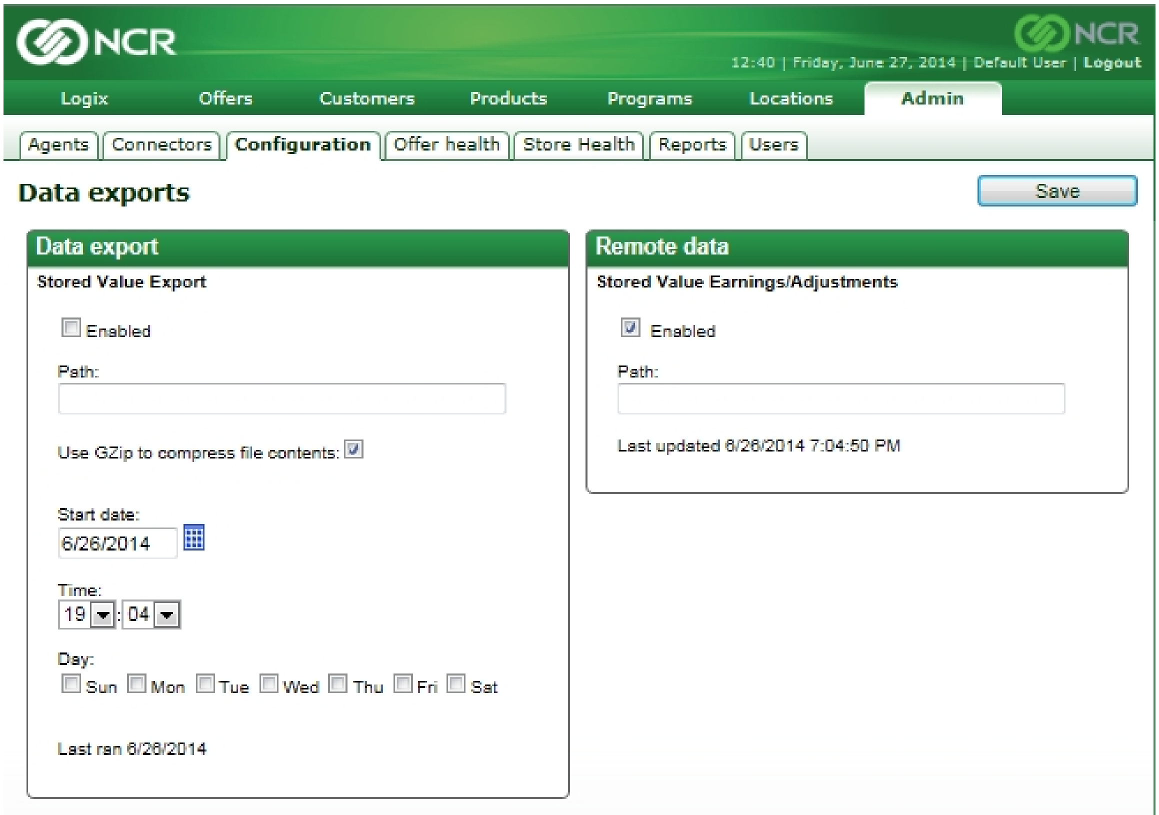
Configuration Button	Description
Buyers	Creates product groups and offers, typically within certain departments. Buyers are associated with administrative users and departments. For more information, refer to *Buyers* on page 621.
External sources	Defines third–party sources to generate offers that are imported to Logix. For more information, refer to *External Offer Sources* on page 625.
PG Attribute Configuration	Customizes the available attributes in the Folders pane of the Product Attribute Builder. For more information, refer to *Creating Attribute–Based Product Groups* on page 438.
Units of measure	Permits users to specify the default unit of measure and the precision level of each unit of measure for weight, length, surface area, and volume. For more information, refer to *Units of Measure (UOM)* on page 636. **Note:** If this feature is disabled, enable the "Enable multi unit of measure for UE" option. For more information, refer to *Localization Options* on page 737.
Offer Approval Workflow	Permits Approval Managers to enable or to disable offer approval workflow and to define offer approvers for each offer deployer user. **Note:** Only users assigned with the Approval Manager permission can make changes to the Offer Approval Workflow page. For more information, refer to *Offer Approval Workflow* on page 639.
Mutual exclusion groups	Indicates that products in the group cannot be used in any offer conditions or rewards. For more information, refer to *Mutual Exclusion Groups* on page 644.
Product Hierarchies	Displays product hierarchies in tree–like structures that logically group similar items. It also allows users to remove items from product hierarchies. For more information, refer to *Removing Items from Product Hierarchies* on page 433. **Example:** A hierarchy organizes all products by their manufacturers.

Configuration Button	Description
Roles	Displays a list of roles that are assigned to users to control their access to certain areas of Logix. For more information, refer to *Configuring User Roles and User Accounts* on page 557.
Scorecards: Discount	Displays the available discount scorecards, and the option to create a new discount scorecard. For more information about discount scorecards, refer to *Discount Scorecards* on page 648.
Store Hierarchies	Displays store hierarchies in tree–like structures that logically group similar stores. It also allows users to remove stores from groups. For more information, refer to *Removing Stores from Store Groups* on page 533.
Tender types: CPE/UE	Allows users to manage the methods of payment that can be proffered for a transaction that can also be used as conditions for offers. For more information, refer to *Tender Types* on page 657. **Example:** Cash, Check, Visa, and so forth.
Terminals	Displays the system's current terminals at which transactions can occur. For more information, refer to *Terminals* on page 659. **Example:** Regular checkout lanes, express lanes, customer service locations, and other points of sale.
Vendors	Allows users to create and manage records for vendors who sponsor offers or allows offers to be charged back to them. These vendors can be set to display in the Vendor drop–down list in the Offers page. **Example:** An offer that provides a discount on a certain kind of cereal is charged back to the vendor. For more information, refer to *Chargeback Vendors* on page 663.
Rejection Types	Displays the available rejection types and the options to add, update, and remove rejection types.
Trigger Code Message	Displays a list of cashier messages that are displayed if a transaction contains the corresponding trigger code, but all the conditions for the associated offer are not met. For more information, refer to *Trigger Code Message* on page 666.

Configuration Button	Description
	Note: Trigger codes are entered in the trigger code condition page of the Offer Builder.
Settings	Allows administrators to configure the system and set its business rules. These settings provide options that are not specific to any promotion engine. For more information, refer to *Accessing System Settings* on page 710.
Settings: UE	Provides system options specific to the Universal Engine (UE). For more information, refer to *Accessing UE Settings* on page 729.
Settings: Web	Displays settings that control the customer–facing website. For more information, refer to *Web Setting Options* on page 744.
Settings: Cache	Provides options that automatically deletes all or specific types of cached data. For more information, refer to *Accessing Cache Settings* on page 745.
Reason Codes	Describes the reason a trigger code was not used. For more information, refer to *Reason Flags and Messages* on page 667.

Data Exports

From the Configuration page, select the **Data exports** button to access the Data Exports page.



The Data Exports page displays the following details:

Section	Description
Data Export	Controls how and when data is exported from the central server, to where, and in what format. Use the following options to manage this feature: • Path—indicates the server file path to which exported data is saved. • GZip—compresses the file's contents. • Start date—indicates the starting date on which the export occurs. • Time—indicates the time in 24–hour format at which the export occurs. • Day—inidicates the day of the week on which the export occurs.
Remote Data	Controls what data gets gathered from local sources and aggregated by the central server. Issuance reports sent up from local servers are common forms of remote data gathering. These issuance data describe things like discounts that were redeemed or printed messages that were presented at the store.

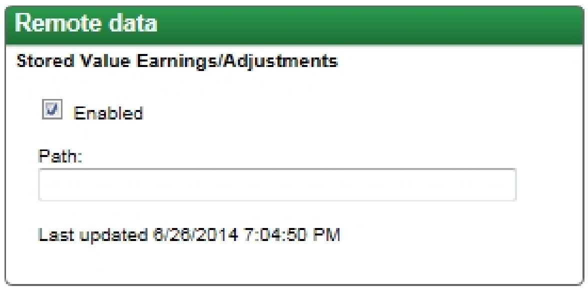
From the Data Exports page, do any of the following:

- Set data export configuration. For more information, refer to *Setting Data Exporting Configuration* on page 617.
- Set remote data gathering configuration. For more information, refer to *Setting Remote Data Gathering Configuration* on the next page.

Setting Remote Data Gathering Configuration

To control the data gathered from local servers and then sent to the central server, follow these steps:

1. From the Data Exports Configuration page, select the **Enabled** check box in the Remote Data section.



2. In the Path field, enter the server file directory to which the gathered data is saved.

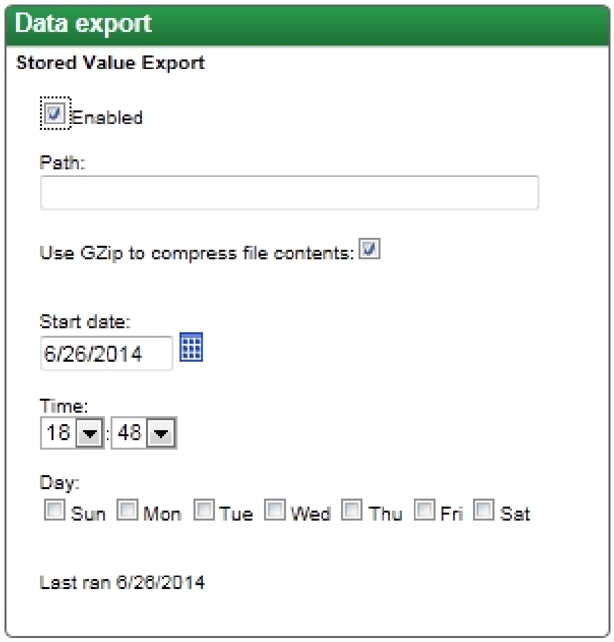
Note: To collect specific rewards details, select the check box of a corresponding reward type.

3. Select **Save**.

Setting Data Exporting Configuration

To control how data are exported from the central server to other locations, follow these steps:

1. From the Data Exports Configuration page, select the **Enabled** check box in the Data Export section.



2. In the Path field, enter the server file directory to which exported data is saved.
3. Select the date and time at which the export process starts.
4. Select the **Day** check box to specify the day of the week on which the export process occurs.
5. Select **Save**.

Chargeback Departments

From the Configuration page, select the **Departments** button to access the Chargeback Departments page.

The Departments page displays the following details:

Column Heading	Description
ID	Unique Identifier for Department created in Logix.
Code	Numeric identifier for the department
Name	Name of the department.
Edited	The date and time the department was last edited.

From the Departments page, do any of the following:

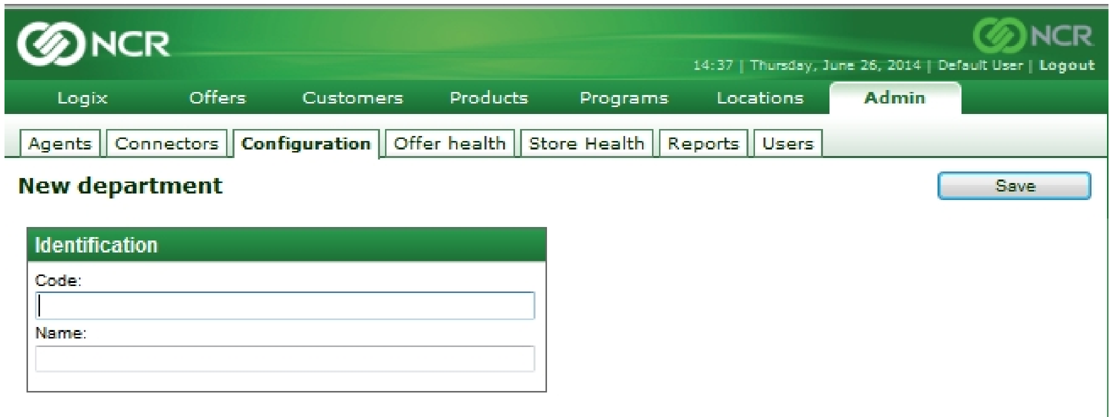
- Create a department. For more information, refer to *Creating Chargeback Departments* on the facing page.
- Modify a department. For more information, refer to *Modifying Chargeback Departments* on page 620.
- Delete a department. For more information, refer to *Deleting Chargeback Departments* on page 620.

Note: To associate an offer with a department, refer to *Discount Reward* on page 263.

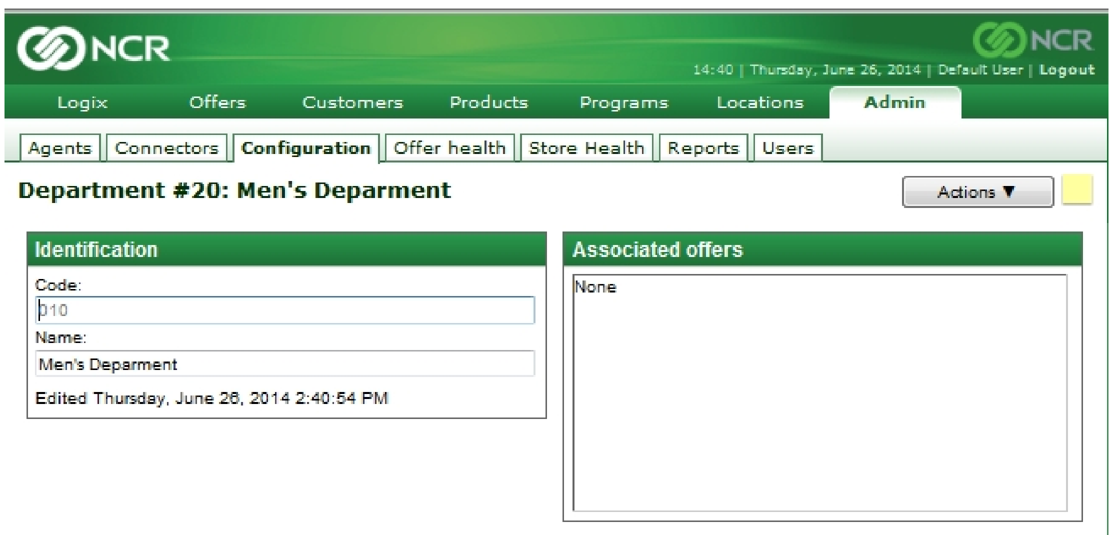
Creating Chargeback Departments

To create a chargeback department, follow these steps:

1. From the Departments page, select **New**. The New Department page is displayed.



2. Enter the code and name for the department.
3. Select **Save**. The Department Configuration page is displayed.



Note: The Associated offers box displays a list of all offers that charge costs against the department. For more information, refer to *Defining Offer Parameters* on page 146.

Modifying Chargeback Departments

To modify chargeback departments, follow these steps:

1. From the Departments page, select a department name. The corresponding department configuration page is displayed.
2. Enter a new name for the department.

Note: To associate an offer with a department, refer to *Discount Reward* on page 263.

3. From the Actions menu, select **Save**.

Deleting Chargeback Departments

To delete chargeback departments, follow these steps:

1. From the Departments page, select a department name. The corresponding department configuration page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.

Note: Deparments associated with offers cannot be deleted. For more information, refer to *Discount Reward* on page 263.

3. Select **OK**. The department is deleted from the Department page.

Buyers

From the Configuration page, select the **Buyers** button to access the Buyers page.

The Buyers page displays the following details:

Column Heading	Description
ID	Unique Identifier for Buyer created in Logix. **Note:** This field cannot be changed if there are non–expired offers or non–deleted product groups associated with the buyer role. No two buyer roles can share the same buyer role identifier.
Buyer	Role identifier of the Buyer.
Name	Name of the users that are participating in the buyer role.
Username	Role associated with the Buyer.
Departments	The department with which the buyer is associated. **Note:** The Buyer can only create offers using products from these departments.
Last Updated	The date and time the department was last edited.

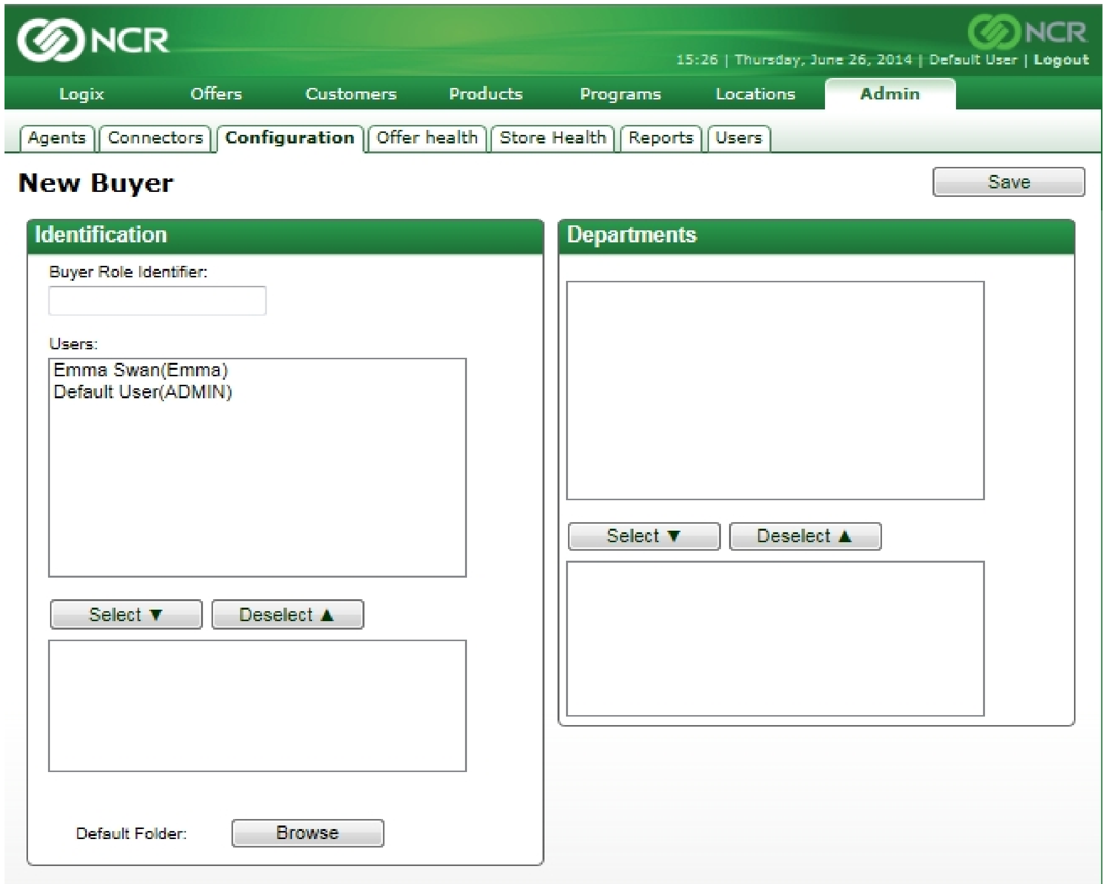
From the Buyers page, do any of the following:

- Create a buyer. For more information, refer to *Creating Buyers* on the next page.
- Modify a buyer. For more information, refer to *Modifying Buyers* on page 624.
- Delete a buyer. For more information, refer to *Deleting Buyers* on page 624.

Creating Buyers

To create a buyer, follow these steps:

1. From the Buyers page, select **New**. The New Buyer page is displayed.



2. Enter the **Buyer Role Identifier**.
3. Do any of the following:
   - To associate the buyer with a user, select a user name from the Users text box and then, use the **Select** button. The user name is moved to the bottom text box.

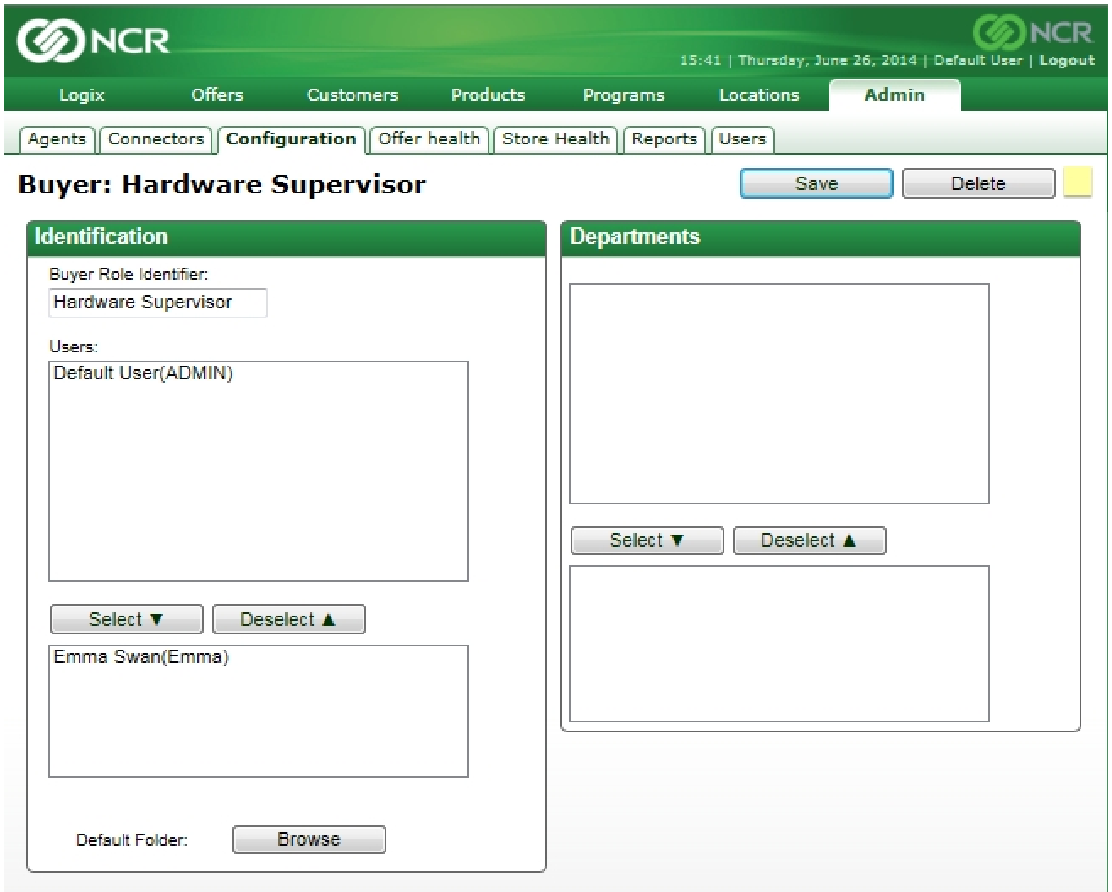
Note: Buyers can be associated with more than one user.

Note: Selecting a default folder specifies a preselected folder when a new offer is created. The buyer role default folder takes precedence over the engine default folder.

   - To associate the buyer with a department, select a department from the Departments text box and then, use the **Select** button. The department is moved to the bottom text box.

Note: Buyers can be associated with more than one department. To create a department, contact a system administrator.

4. Select **Save**. The Buyer Configuration page is displayed.



Modifying Buyers

To modify a buyer configuration, follow these steps:

1. From the Buyers page, select a buyer name. The corresponding Buyer Configuration page is displayed.
2. Modify either of the following:
   - associated users
   - associated departments

Note: To create a department, contact the system administrator.

3. Select **Save** to apply the changes.

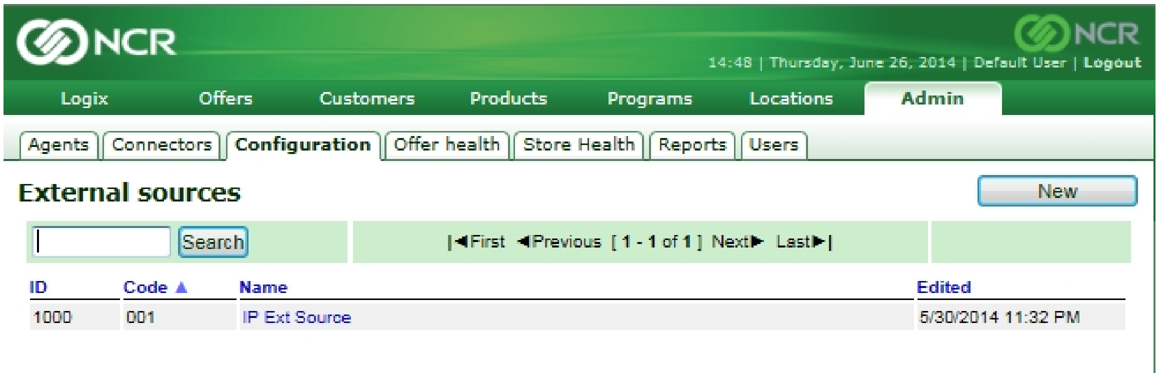
Deleting Buyers

To delete a buyer, follow these steps:

1. From the Buyers page, select a buyer name. The corresponding buyer configuration page is displayed.
2. Select **Delete**. A confirmation window is displayed.
3. Select **OK**.

External Offer Sources

From the Configuration page, select the **External sources** button to access the External sources page.



The External source page displays the following details:

Column Heading	Description
ID	Unique Identifier for External Sources created in Logix.
Code	This identifier cannot be changed while the source is in use.
Name	Name of the external source.
Edited	The date and time the external source was last edited.

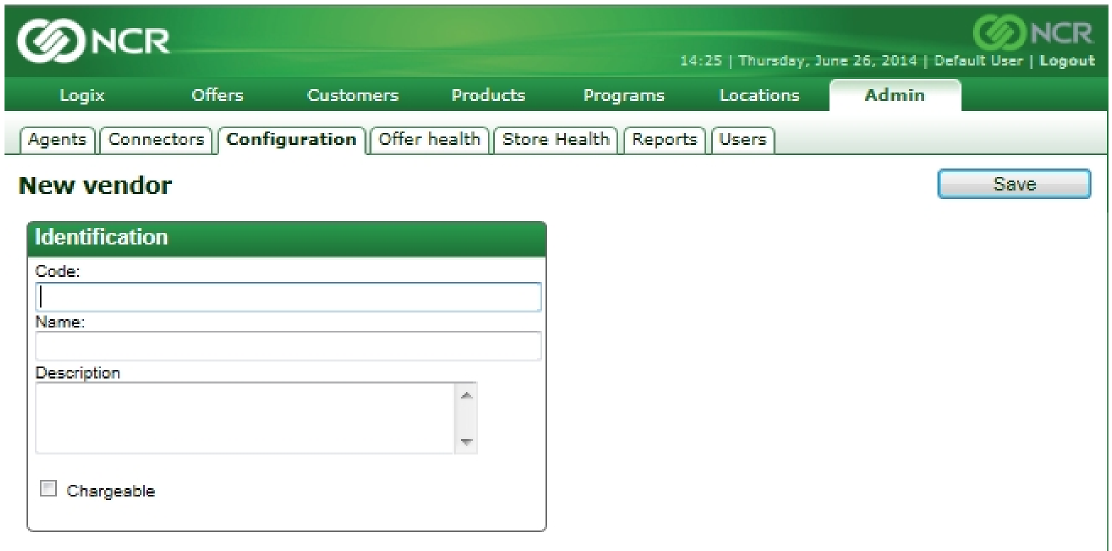
From the External Sources page, do any of the following:

- Create an external source. For more information, refer to *Creating External Offer Sources* on the next page.
- Modify an external offer source. For more information, refer to *Modifying External Offer Sources* on page 629.
- Delete an external offer source. For more information, refer to *Deleting External Offer Sources* on page 629.

Creating External Offer Sources

To create an external source, follow these steps:

1. From the External Sources page, select **New**. The New External Source page is displayed.



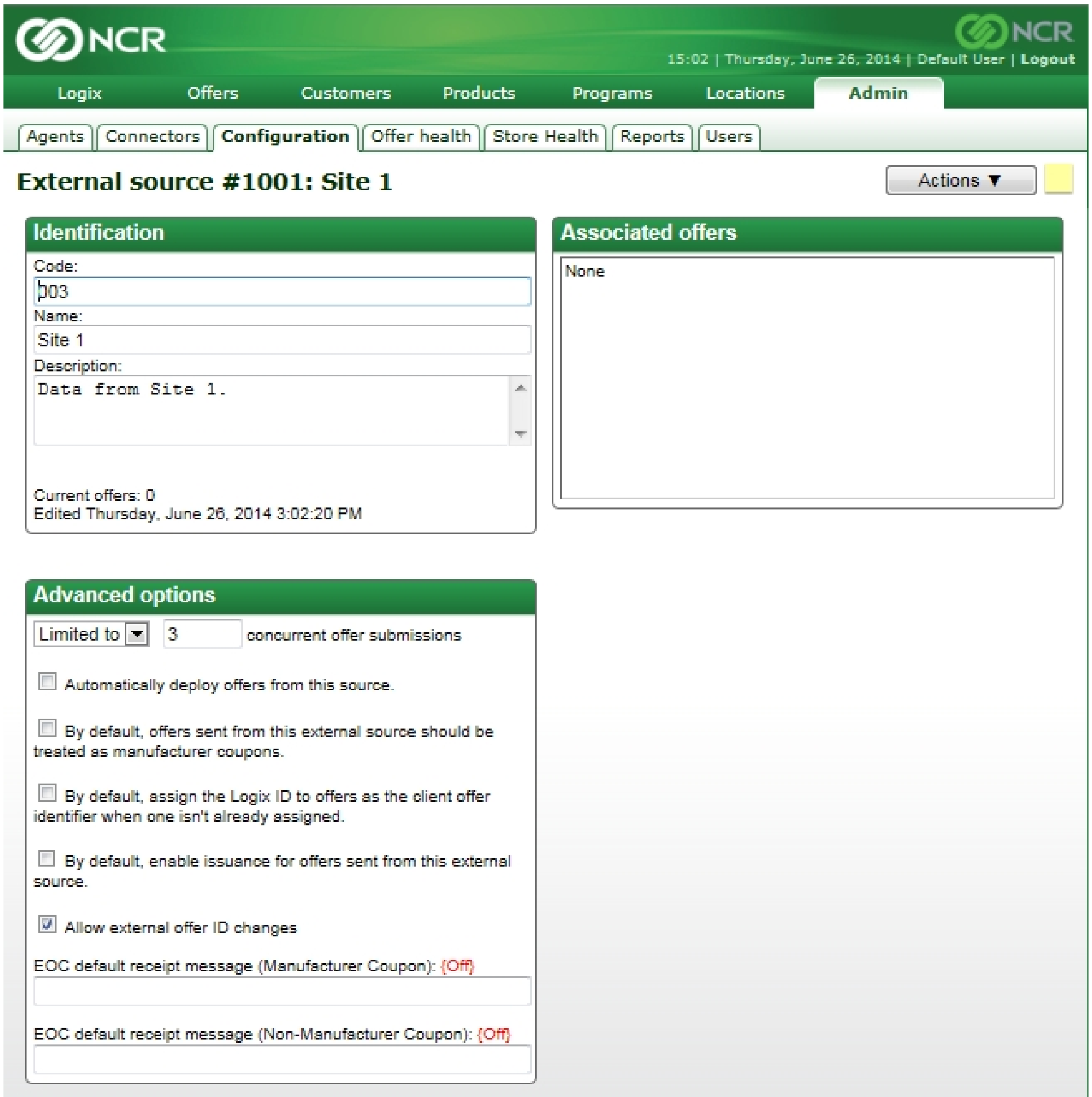
2. In the Identification section, enter the primary characteristics of the source.

Note: The Code identifier cannot be changed while the source is in use.

3. In the Advanced Options section, refer to the following table to set options:

Option Name	Description
Offer submissions	Controls the number of current offers that simultaneously come from the source using any of the following options: • **Disabled**—prevents offer submissions • **Unlimited**—allows any number of submissions • **Limited to**—specifies a number of offers
Automatically deploy offers from this source	If selected, offers generated from the external source are automatically marked for deployment when they are imported into Logix.
By default, offers sent from this external source should be treated as manufacturer coupons	If selected, all offers created through the External Offer Connector for this external source are treated as manufacture coupons. **Note:** This feature is not used for CM offers.
By default, assign the Logix ID to offers as the client offer identifier when one isn't already assigned	If selected, the external offer ID used when creating an external offer is stored and used as the client offer ID. If an external offer is created and no external offer ID is provided, then Logix ID will be used as the external ID.
By default, enable issuance for offers sent from this external source	If selected, external offers submitted by this external source can optionally send Issuance data.
Allow external offer ID changes	If selected, the external offer ID can be modified from the Offer Configuration page.
EOC default receipt message (Manufacturer Coupon)	To enable these options, set the **Enable default receipt message for external offers** option of the External Offer Connector. For more information, refer to *Modifying Connector Options* on page 604.
EOC default receipt message (Non–Manufacturer Coupon)	

4. Select **Save**. The External Source Configuration page is displayed.



Note: To associate the external source with offers, refer to *Defining Offer Parameters* on page 146.

Modifying External Offer Sources

To modify an external offer source, follow these steps:

1. From the External source page, select an external source name. The corresponding external source configuration page is displayed.
2. Modify the parameter values in the Identification box.

Note: For more information, refer to *Defining Offer Parameters* on page 146.

3. From the Actions menu, select **Save** to apply the changes.

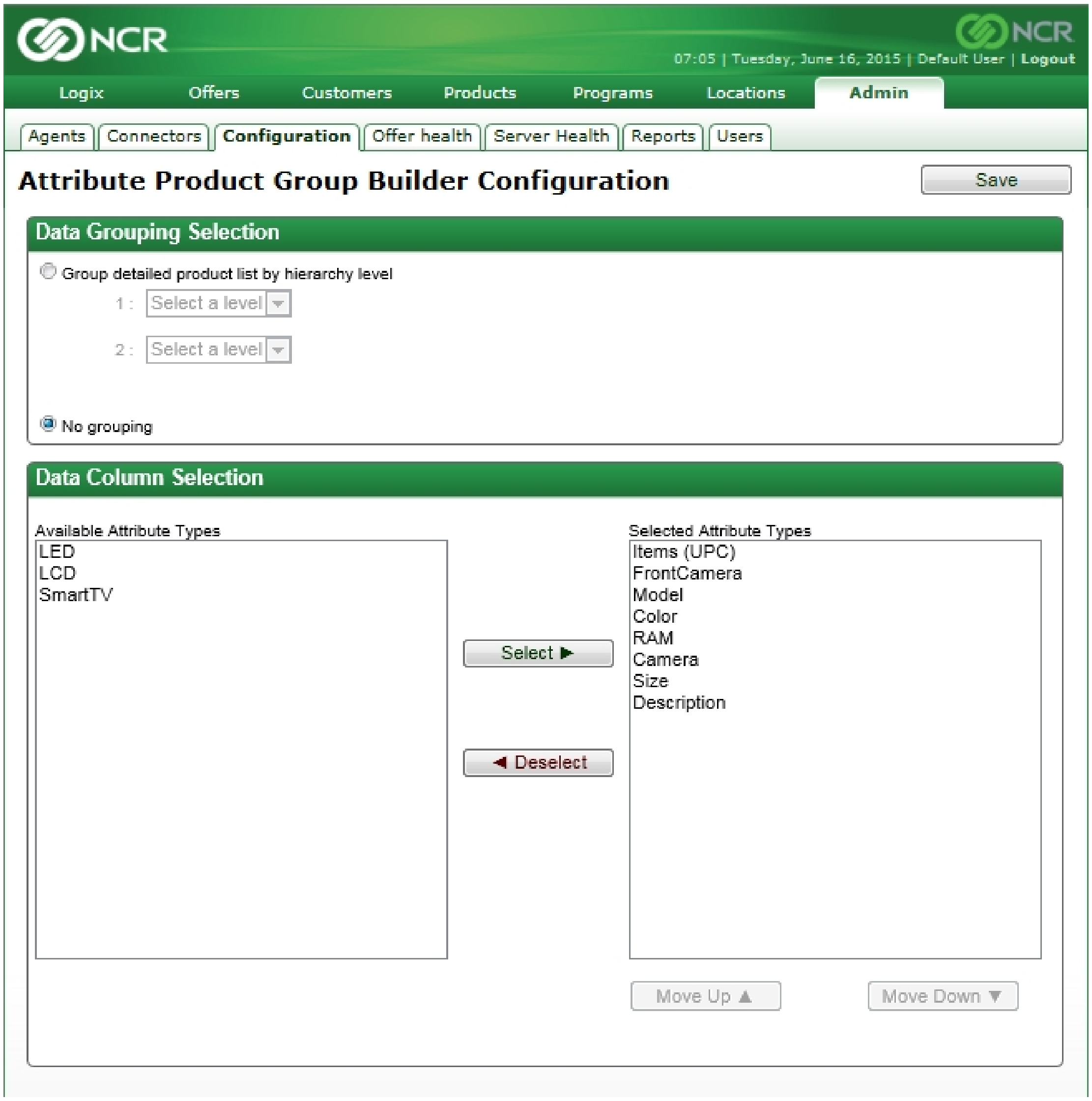
Deleting External Offer Sources

To delete an external offer source, follow these steps:

1. From the External Source page, select an external source. The corresponding external source configuration page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**.

Attribute Product Group Builder Configuration

From the Configuration page, select the **PG Attribute Configuration** button to access the Attribute Product Group Builder Configuration page.



The Attribute Product Group Builder Configuration page displays the following sections:

Section	Description
Data Grouping Selection	Displays the following options: • **Group detailed product list by hierarchy level**—displays a drop–down list of product hierarchy levels. For more information, refer to *Grouping Detailed Product List by Hierarchy Levels* on page 633. **Note:** If the system is configured with multiple hierarchies, Logix displays corresponding drop–down lists for each hierarchy. • **No grouping**—indicates that the product list is not grouped.
Data Column Selection	Displays the following details: • **Available Attribute Types**—attributes that are displayed in the Detailed Product List. • **Selected Attribute Types**—attributes that can be added and displayed in the Detailed Product List.

For more information, refer to *Excluding Attribute–Based Items* on page 462.

Using the Attribute Product Group Builder Configuration Page

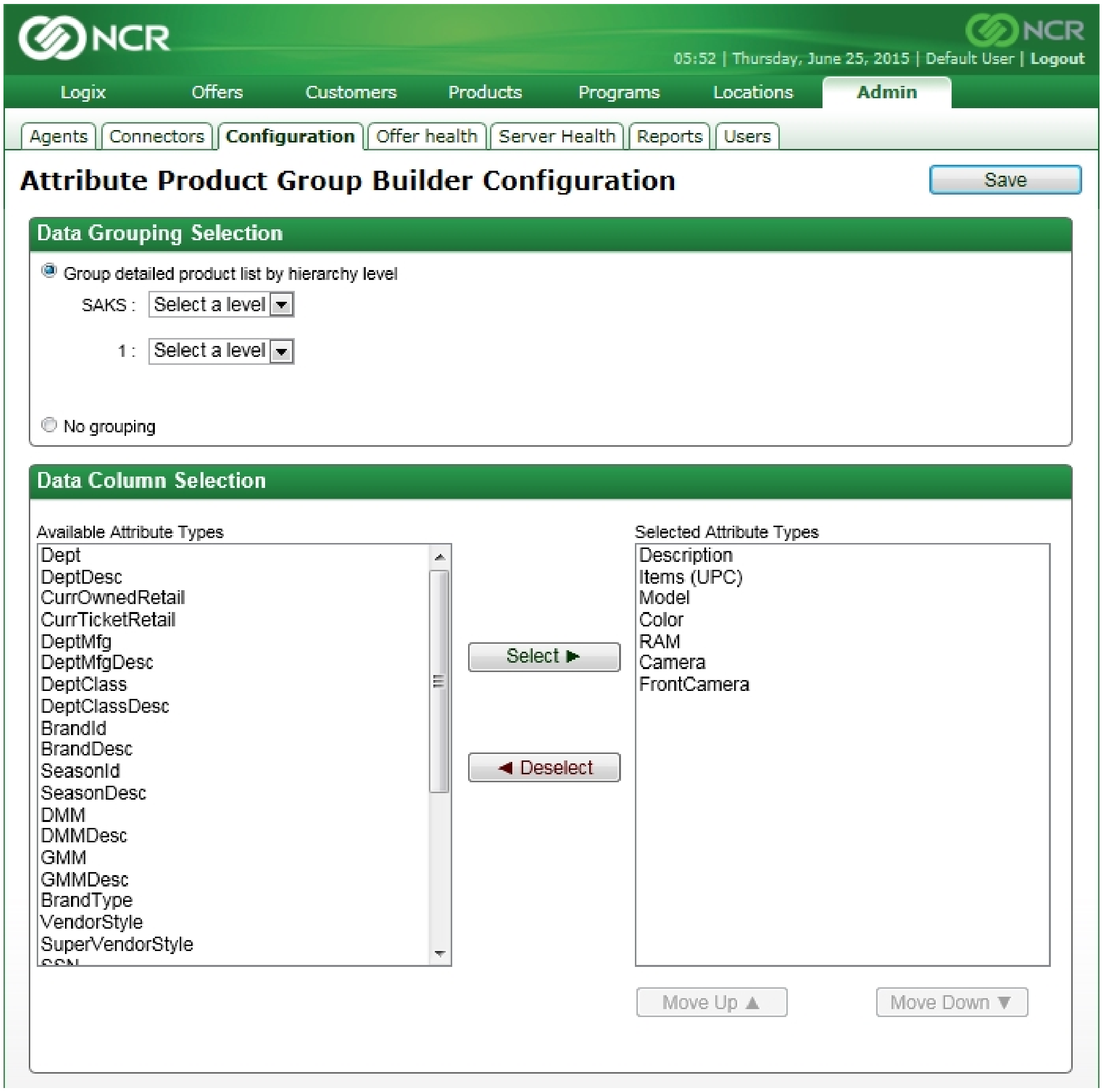
Use the Attribute Product Group Builder Configuration page to display product groupings in the Detailed Product List based on the following:

- Hierarchy levels. For more information, refer to *Grouping Detailed Product List by Hierarchy Levels* on the facing page.
- Column headers. For more information, refer to *Modifying Column Headers of the Detailed Product List* on page 635.

Grouping Detailed Product List by Hierarchy Levels

To group products in the Detailed Product List by hierarchy levels, follow these steps:

1. From the Data Grouping Selection section, select **Group detailed product list by hierarchy level**. The hierarchy level drop–down lists are enabled.



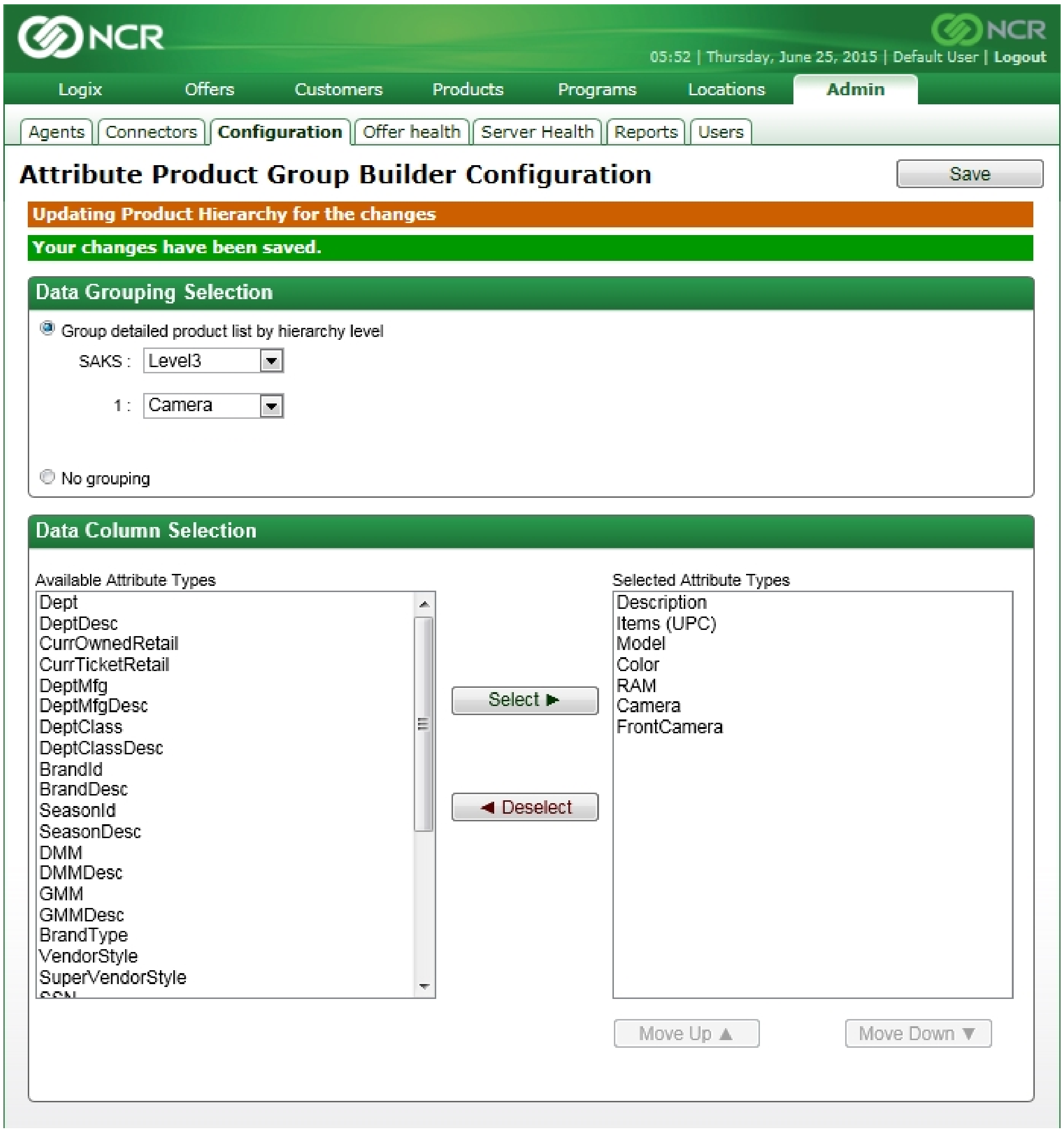
Note: Logix may display only one hierarchy level drop–down list indicating that only one product hierarchy level is configured in the system. To modify the number of hierarchy levels, contact an NCR Professional Services Consultant.

2. From each hierarchy level drop–down list, select a grouping option.

Note: If there are multiple hierarchy level drop–down lists displayed in the Attribute Product Group Builder Configuration page, users are required to select a grouping option from each level.

3. Select **Save**. Logix displays message bars while the corresponding changes are applied to the hierarchy levels.

Note: The grouping option that corresponds with the product hierarchy node that was selected when adding items from product hierarchies, is used to group the items in the Detailed Product List. For more information, refer to *Adding Items from Product Hierarchies for Attribute Product Groups* on page 442.



Note: The selected grouping option is indicated as the leftmost attribute column header in the Detailed Product List. For more information, refer to *Excluding Attribute–Based Items* on page 462.

Modifying Column Headers of the Detailed Product List

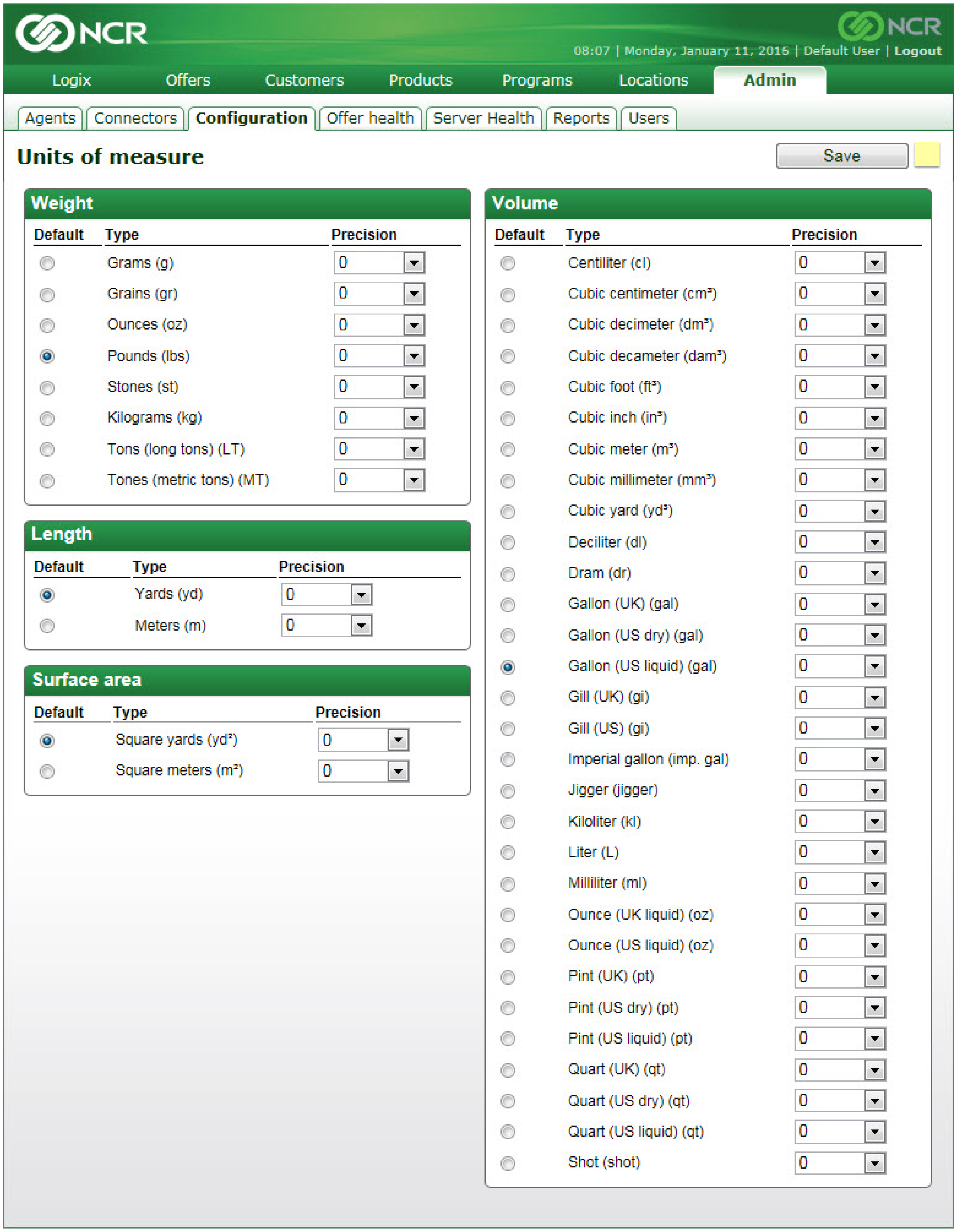
To modify the attributes that are displayed as column headers in the Detailed Product List, do the following:

1. To add an attribute column header to the Detailed Product List, highlight an attribute from the Available Attribute Types box and then, use the **Select** button. The attribute is added to the Selected Attribute Types box and then displayed in the Detailed Product List.
2. To exclude an attribute column header from the Detailed Product List, highlight an attribute from the Selected Attribute Types box and then, use the **Deselect** button. The attribute is removed from the Selected Attribute Types box and then, excluded from the Detailed Product List.
3. To modify the order of the attribute column headers in the Detailed Product List, select an attribute and then, use the **Move Up** and **Move Down** buttons. For more information, refer to *Excluding Attribute–Based Items* on page 462.

Note: The topmost attribute is the first attribute column header in the Detailed Product List and then, followed by the succeeding attributes.

Units of Measure (UOM)

From the Configuration page, select the **Units of measure** button to access the Units of measure configuration page.



The Units of measure configuration page displays the following sections:

Section	Description
Weight	Displays the types of the weight UOM, the precision level for each type, and the default type (selected radio button).
Length	Displays the types of the length UOM, the precision level for each type, and the default type (selected radio button).
Surface area	Displays the types of the surface area UOM, the precision level for each type, and the default type (selected radio button).
Volume	Displays the types of the volume UOM, the precision level for each type, and the default type (selected radio button).

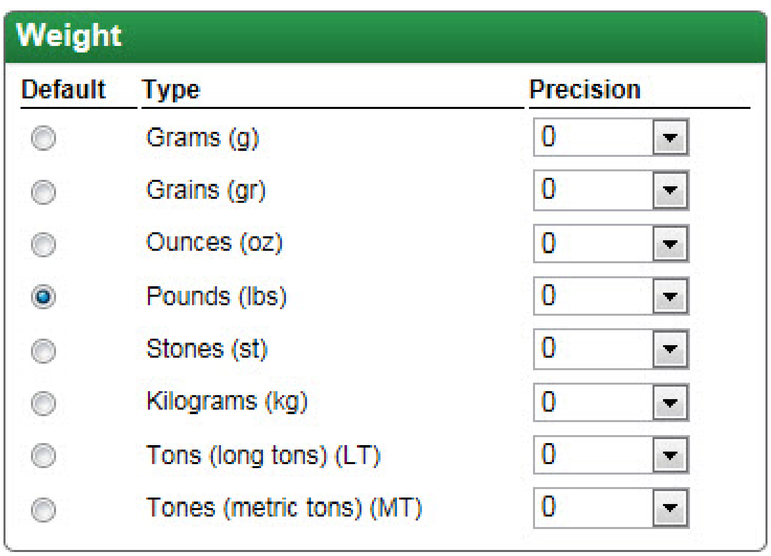
Configuring Units of Measure

The Units of measure configuration page permits users to set the default type for the weight, length, surface area, and volume UOMs, and then set the corresponding precision levels for all types.

Note: Quantity values for weight, length, surface area, and volume can have up to three decimal values for precision purposes.

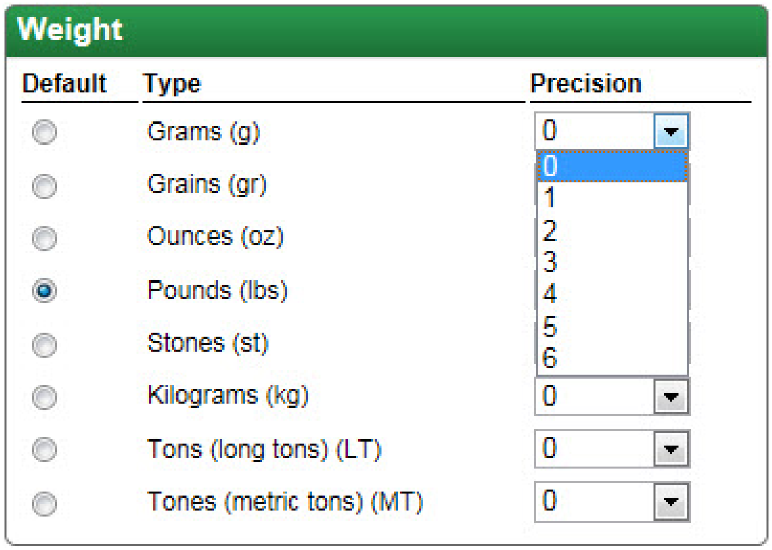
To configure the units of measure, follow these steps:

1. From the Units of measure configuration page, determine the unit of measure to configure. For example, Weight.



2. Set the default type by selecting the respective radio button.

3. From the Precision drop–down list, select the precision level for each type of the weight UOM.



Note: The default precision level for all units of measure is zero (0).

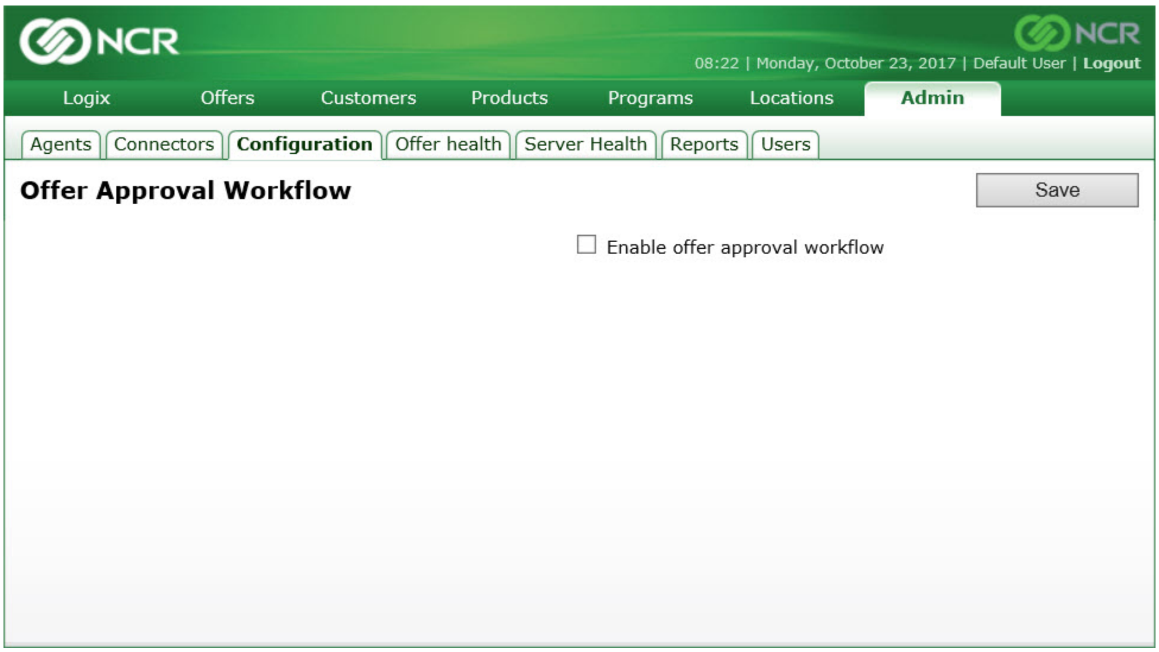
4. Select **Save**.

Offer Approval Workflow

From the Configuration page, select the **Offer Approval Workflow** button to access the Offer Approval Workflow page.

Note: If banners are enabled, additional settings are added to the page to enable the offer approval workflow for each banner, to select a default approver for the banner, and to select offer deployment approvers from the list of banner users.

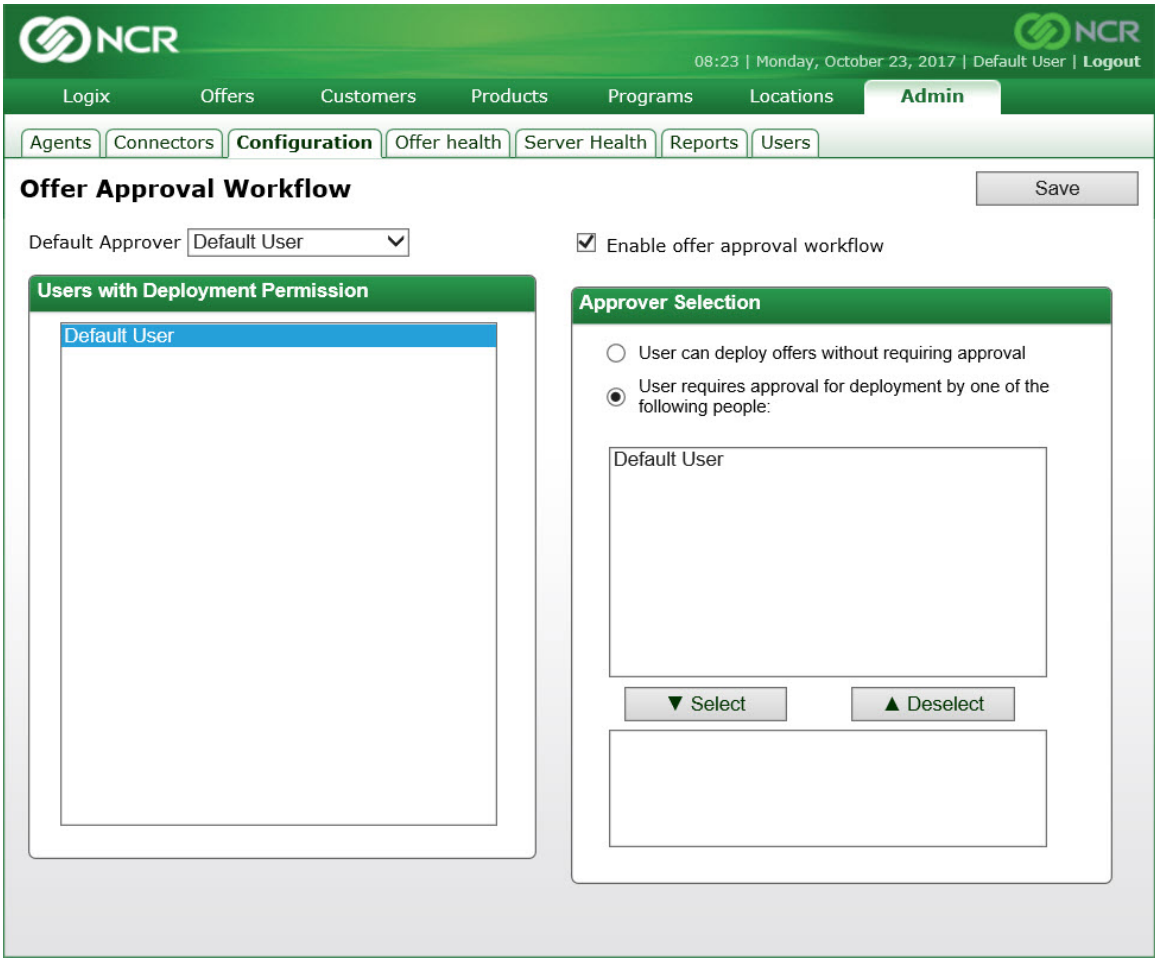
The following screen is displayed if the offer approval workflow is disabled. In this example, banners are not enabled.



To enable the offer approval workflow, select the **Enable offer approval workflow** check box.

Note: Only users assigned with the Approval Manager permission can make changes to the Offer Approval Workflow page.

If the offer approval workflow is enabled, the following screen appears.



The Offer Approval Workflow page displays the following details:

Section	Description
Default Approver drop-down list	Sets the default offer approver.
Enable offer approval workflow check box	Enables the offer approval workflow.
Users with Deployment Permission	Displays the list of users who are assigned with the offer deployment permission.

Section	Description
Approver Selection	Allows users with approval managers permission to define which offer deployer users do not need approval before deployment and which users need approval. Also, it allows users with approval managers permission to define offer approvers for some or all of the offer deployer users.

From the Offer Approval Configuration page, do any of the following:

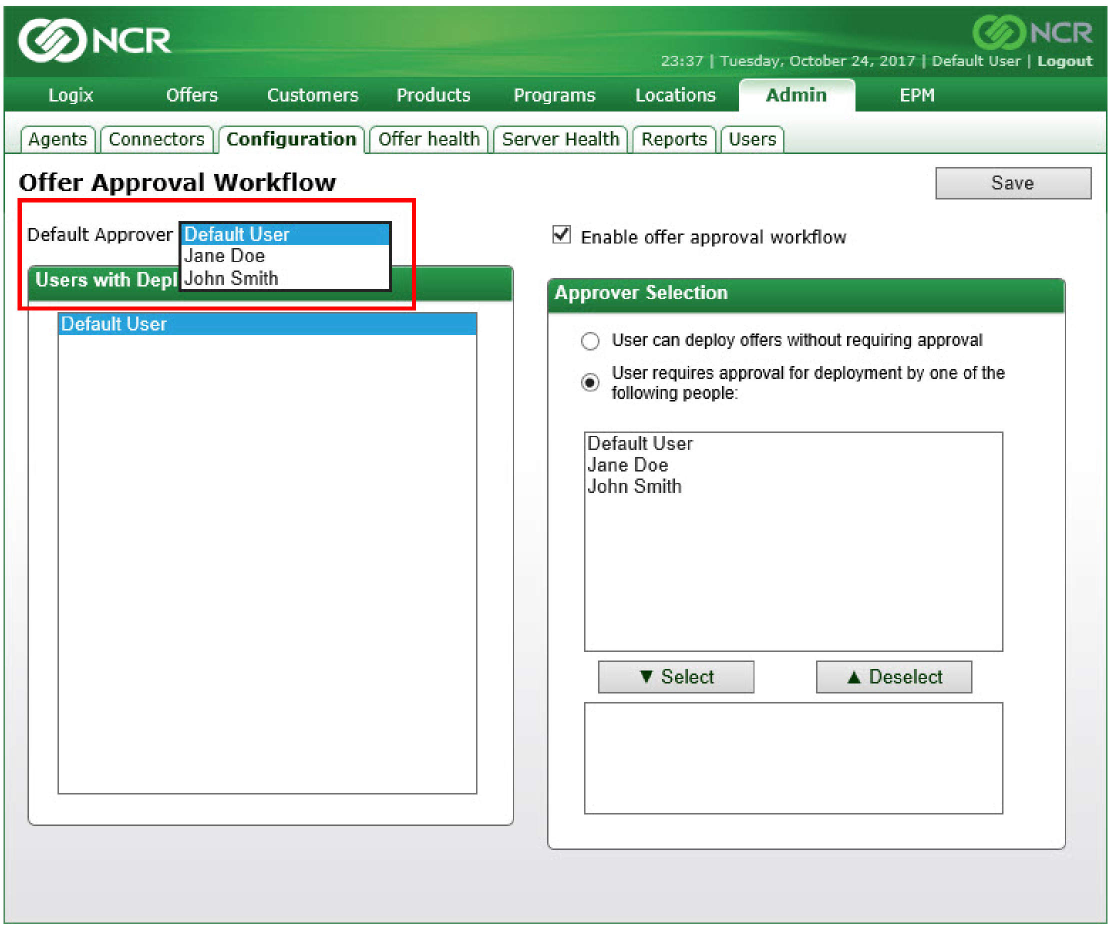
- Set the default approver. For more information, refer to *Setting the Default Approver* on the next page.
- Select approvers. For more information, refer to *Selecting Approvers* on page 643.

Setting the Default Approver

In the Offer Approval Workflow, the Default Approver drop-down list displays the list of users who are assigned with the Offer Approval permission. All the offer deployer users for which no specific configuration is defined under the Approver Selection section require offer approval by default, and the selected default approver acts as the offer approver for all such users.

To set the default approver, follow these steps:

1. From the Offer Approval Workflow page, select a user from the Default Approver drop-down list.

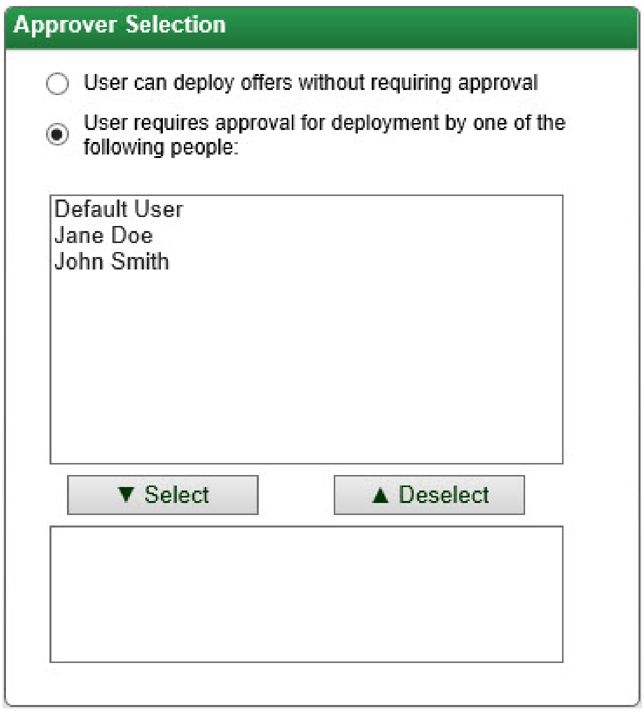


2. Select **Save**.

Selecting Approvers

In the Offer Approval Workflow page, users with the approval manager permission can do the following in the Approver Selection section:

1. Define if the selected offer deployer user under the *User with deployment permission* section needs offer approval or not.
2. Select and set one or more offer approver from the list of available offer approver for the selected offer deployer user under *User with deployment permission* section.



Note: All the offer deployer users for which no specific configuration is defined under the Approver Selection section require offer approval by default, and the selected default approver acts as the offer approver for all such users.

Mutual Exclusion Groups

From the Configuration page, select the **Mutual Exclusion Groups** button to access the Mutual Exclusion Groups page. Mutual exclusion groups allow exclusion rules to be set up around an offer based on two types of mutual exclusion groups — offer level and item level.

The Mutual Exclusion Groups page displays the following details:

Column Heading	Description
ID	System-generated ID.
Name	Name of the mutual exclusion group.
Level	The type of exclusion group: • **Offer–level**—only the offer with the highest priority will be given or earned in the transaction. **Example:** For example, if “Offer A”, “Offer B” and “Offer C” are offer–level exclusive of one another and all three offers are active in a transaction, only one of the offers may be earned in the transaction. The UE processes the highest priority offer among the group of offers that are offer–level exclusive. • **Item–level**—when two (or more) offers are item–level exclusive, they may not use the same items to satisfy their product conditions. **Example:** If a transaction contains a single item “A” and there are two offers that need to use the item to satisfy their product conditions, only one of the offers may use the item if they are item–level exclusive.
Edited	The date and time the mutual exclusion group was last edited.

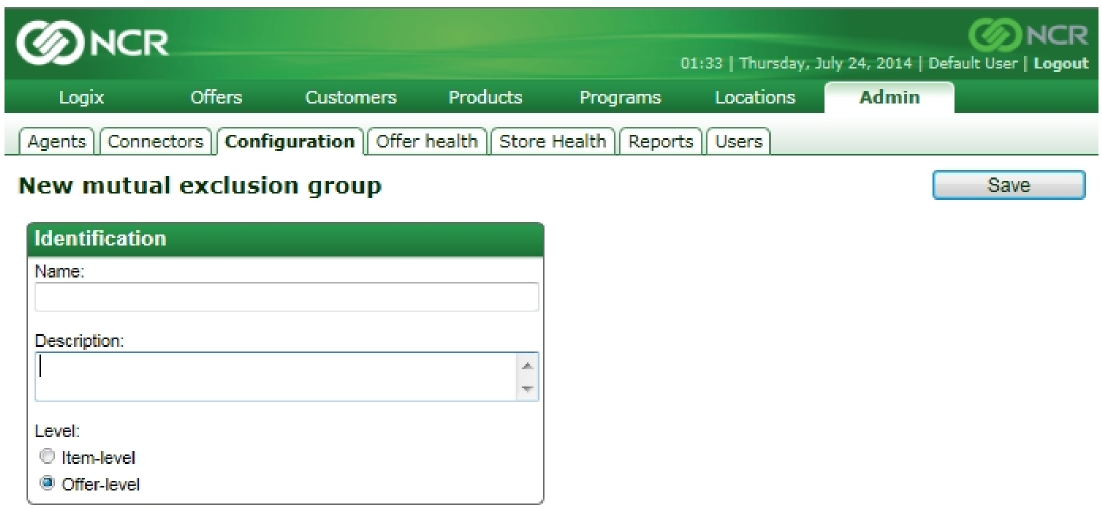
From the Mutual Exclusion Groups page, do any of the following:

- Create a mutual exclusion group. For more information, refer to *Creating Mutual Exclusion Groups* below.
- Delete a mutual exclusion group. For more information, refer to *Deleting Mutual Exclusion Groups* on page 647.

Creating Mutual Exclusion Groups

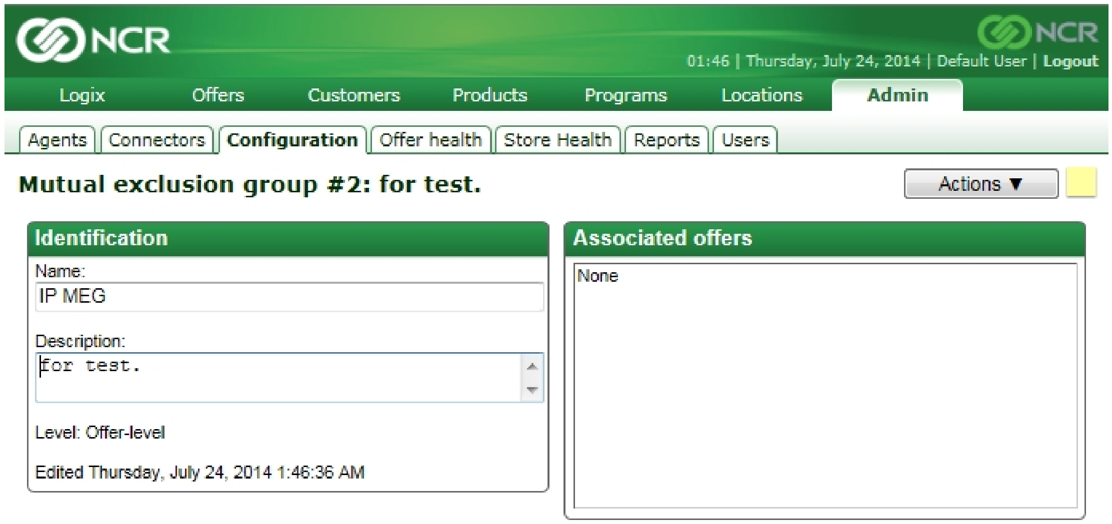
To create a mutual exclusion group, follow these steps:

1. From the Mutual Exclusion Groups page, select **New**. The New Mutual Exclusion Group page is displayed.



2. Enter the following details:
   - **Name**—name of the mutual exclusion group.
   - **Description**—description of the mutual exclusion group.
   - **Level**—the type of exclusion rule that controls offer interactions.

3. Select **Save**. The corresponding Mutual Exclusion Group Configuration page is displayed, as shown in the following example:

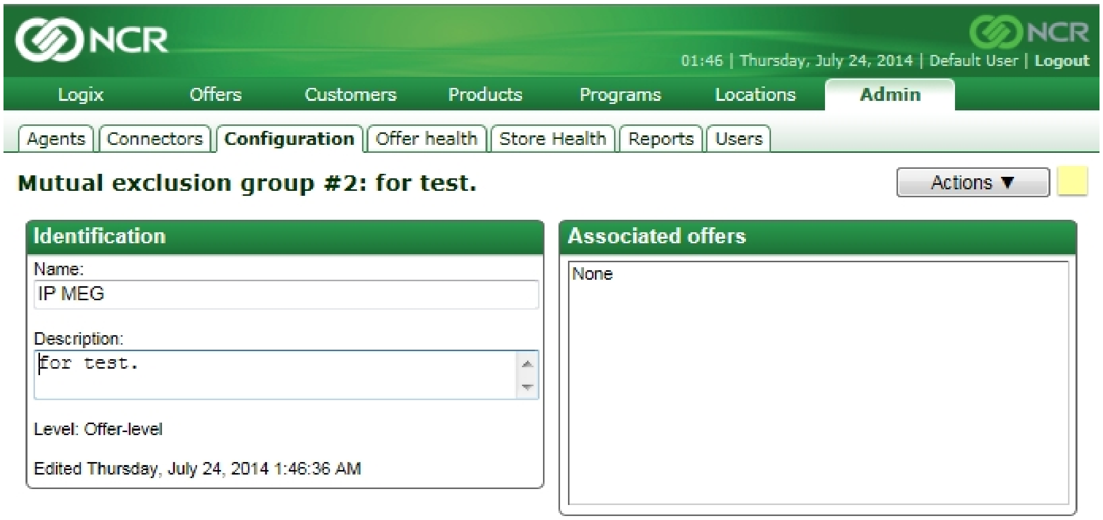


To associate the mutual exclusion group with offers, refer to *Associating Offers with Mutual Exclusion Groups* on page 151.

Deleting Mutual Exclusion Groups

To create a mutual exclusion group, follow these steps:

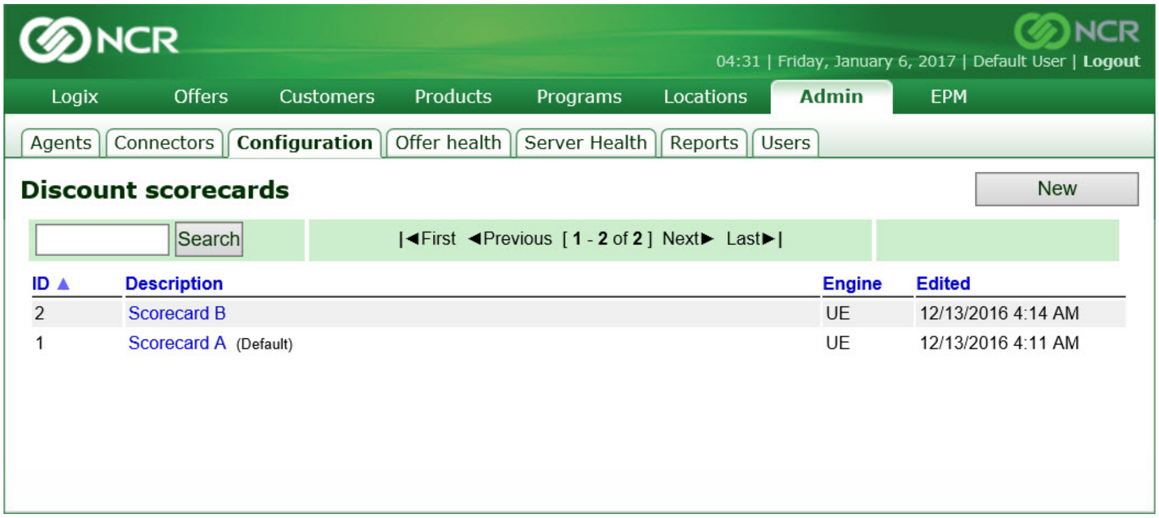
1. From the Mutual Exclusion Groups page, select mutual exclusion group. The corresponding Mutual Exclusion Configuration page is displayed, as shown in the following example:



2. From the Actions menu, select **Delete**.

Discount Scorecards

A discount scorecard is an area in a printed receipt where the customer's discount during a transaction is summarized. From the Configuration page, select **Scorecards: Discount** to display the Discount scorecards page.



The following details are displayed in this page:

Column Heading	Description
ID	Indicates the discount scorecard's unique ID number.
Description	Indicates the name of the discount scorecard.
Engine	Indicates the engine with which the discount scorecard is associated.
Edited	Indicates the date and time when the discount scorecard was last edited.

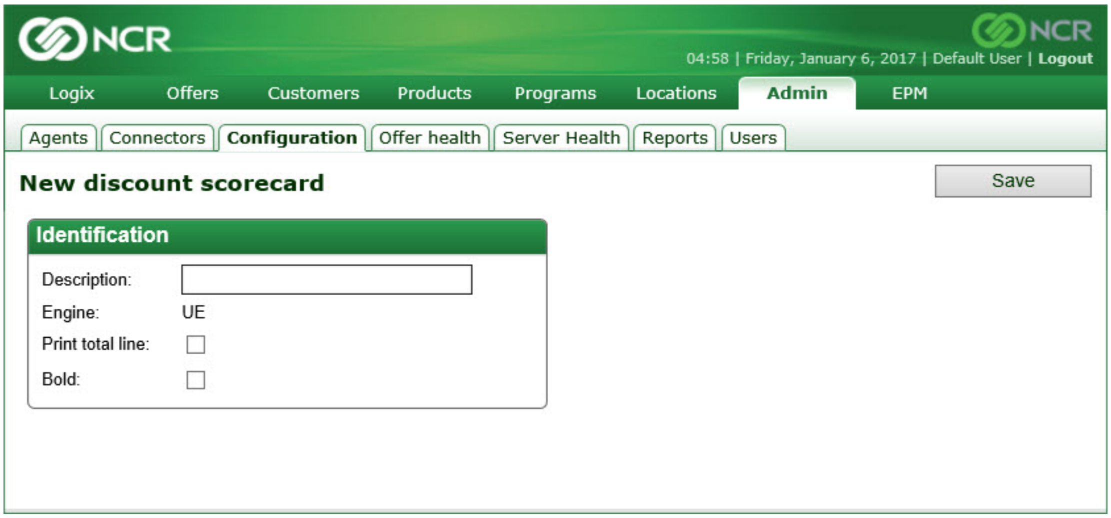
Use this page to perform the following:

- Create a discount scorecard. For more information, refer to *Creating a Discount Scorecard* on the facing page.
- Modify a discount scorecard. For more information, refer to *Modifying a Discount Scorecard* on page 651.
- Delete a discount scorecard. For more information, refer to *Deleting a Discount Scorecard* on page 652.

Creating a Discount Scorecard

To create a discount scorecard, follow these steps:

1. From the Discount scorecard page, select **New**. The New discount scorecard page is displayed.

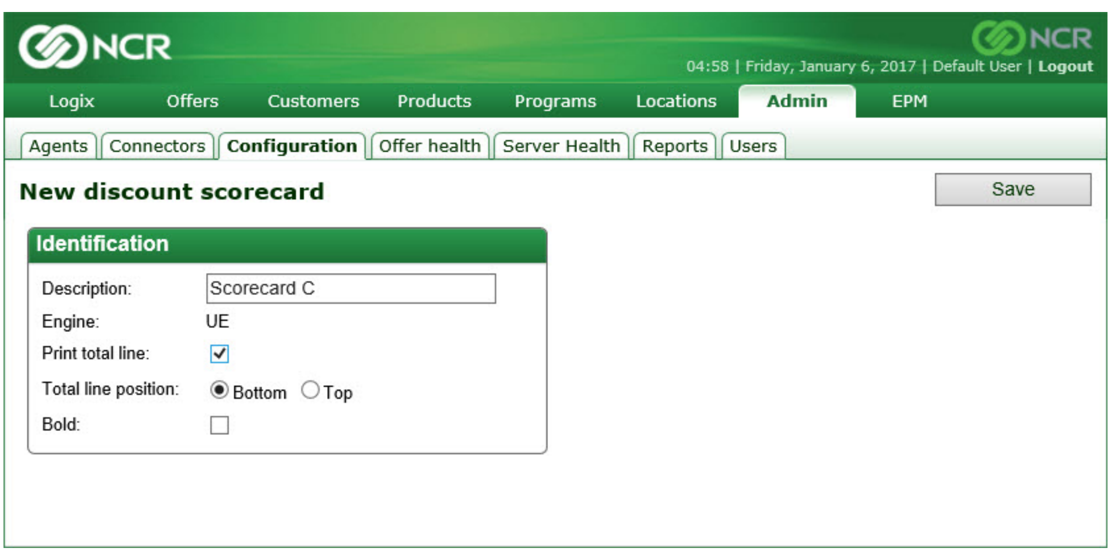


2. Enter the name of the discount scorecard in the **Description** field.
3. Select the engine, either **CPE** or **UE**, with which the discount scorecard will be associated.

Note: The sample image above reflects a system where only the UE engine is installed; thus, the UE engine is selected by default.

4. Select the **Print total line** check box to print the total of all the discounts of this scorecard in the receipt.

Note: If this check box is selected, the **Total line position** option is displayed.



Select whether to print the total line at the **Bottom** or at the **Top** of the scorecard.

5. Select the **Bold** check box to print the discount scorecard details in bold format.
6. Select **Save**. The discount scorecard configuration page is displayed.

The **Default for engine** check box is selected by default. It indicates that the discount scorecard is displayed by default when creating a new discount reward. If another discount scorecard is already set as the default, this option is disabled in the other discount scorecards, as shown above.

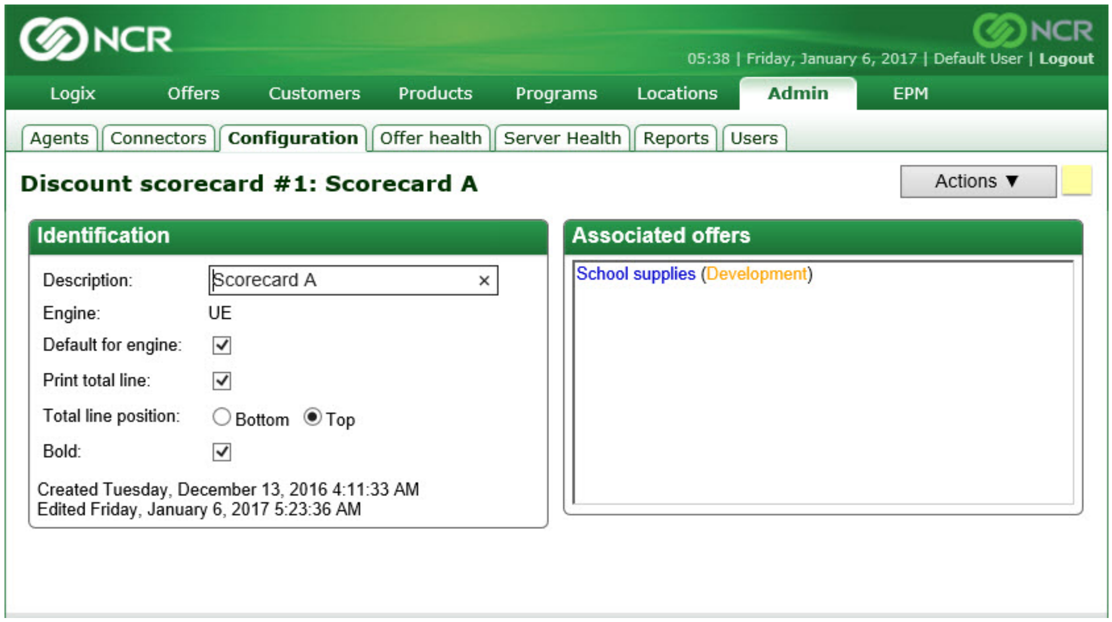
The **Associated offers** box displays a list of offers that use discount rewards that are configured with the discount scorecard. For more information about discount rewards, refer to *Setting Discount Rewards* on page 1.

7. From the Actions menu, select **Save**.

Modifying a Discount Scorecard

To modify a discount scorecard, follow these steps:

1. From the Discount scorecards page, select the scorecard name. The corresponding discount scorecard configuration page is displayed.

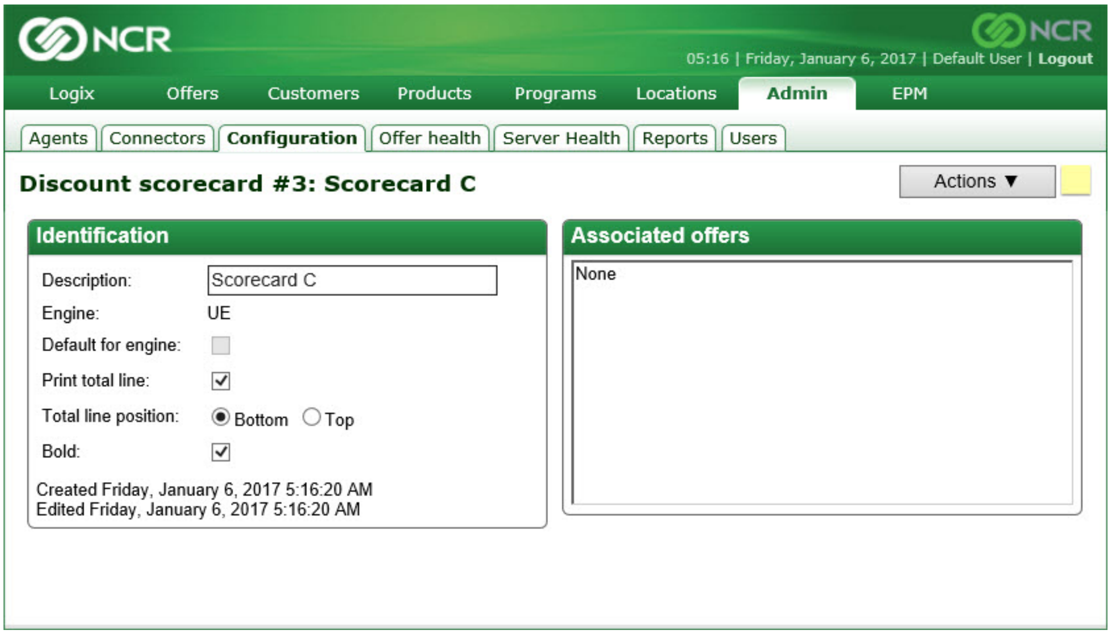


2. Modify the parameter values in the **Identification** box.
3. From the Actions menu, select **Save** to apply the changes.

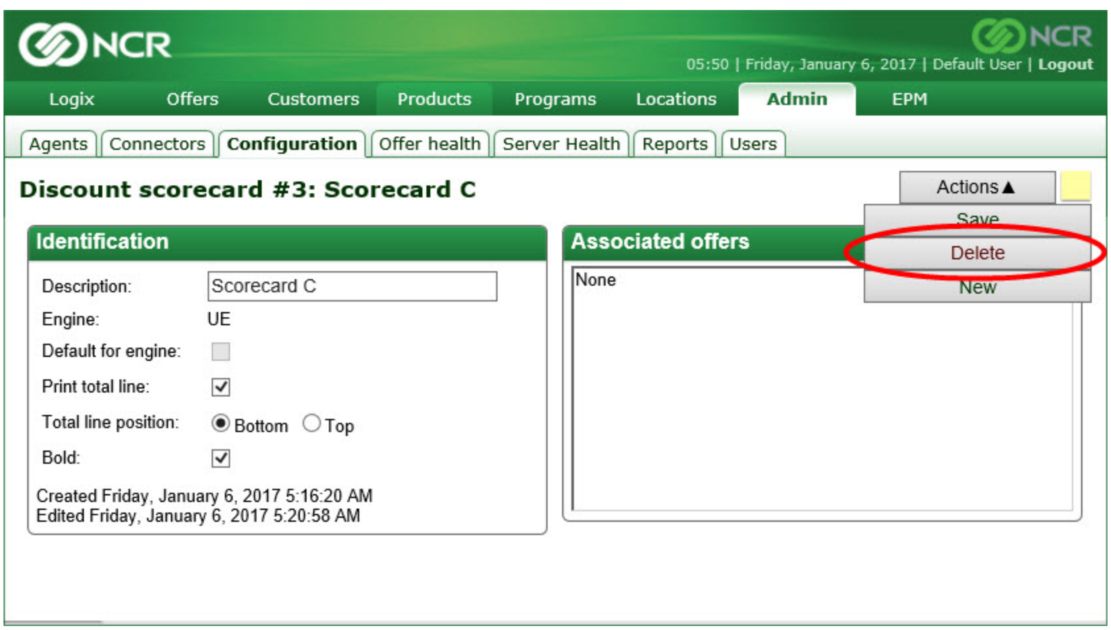
Deleting a Discount Scorecard

To delete a discount scorecard, follow these steps:

1. From the Discount scorecards page, select the scorecard name. The corresponding discount scorecard configuration page is displayed.

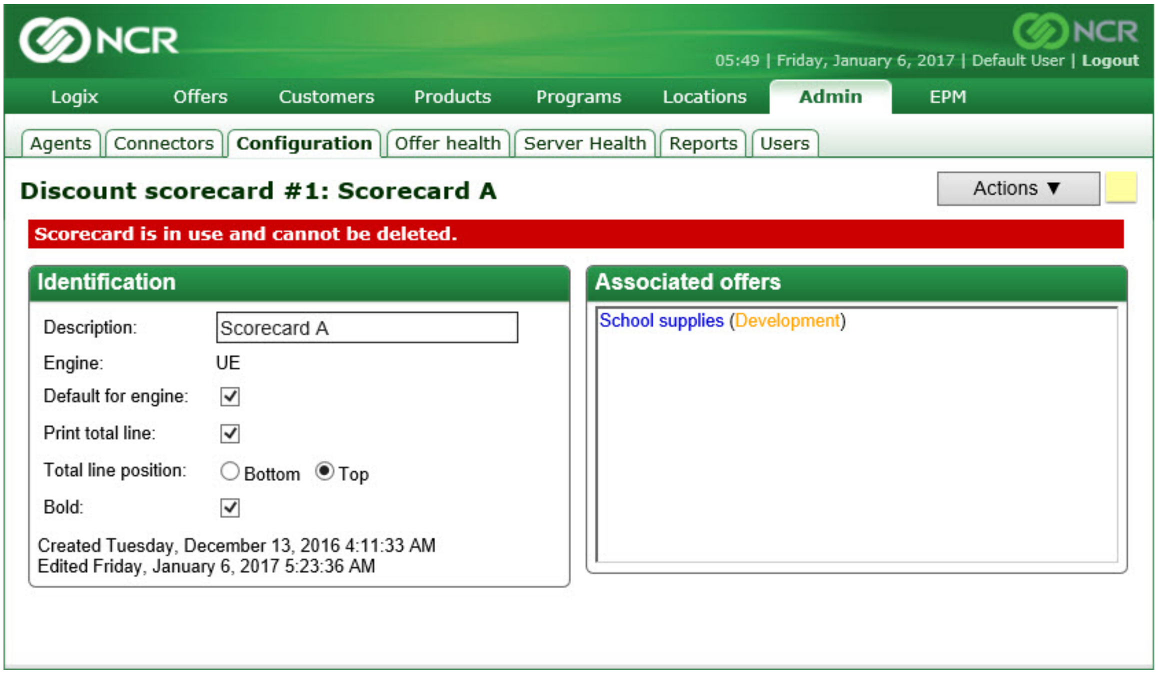


2. From the Actions menu, select **Delete**.



3. A confirmation window is displayed. Select **OK**.

Note: A discount scorecard can be deleted only if it is not associated with any existing offer. When attempting to delete a discount scorecard that is associated with an offer, the following message is displayed.



Associating Discount Scorecards with Offers and Templates

Users can attach discount scorecards to offers using the discount reward. For more information, refer to *Setting Discount Rewards* on page 263.

The details of a discount scorecard are carried over when an offer that is associated with this discount scorecard is copied, imported, or exported, or when the offer is used to create a template.

Also, if the discount scorecard is associated with a template, its details are carried over when the template is copied or is used to create a new offer.

Printing Discount Scorecards in Receipts

Retailers can select which offers can be associated with a discount scorecard, and then configure to print the discount scorecard. One or more discount scorecards can be printed on the receipt, with each scorecard displaying the savings from each offer that is associated with that scorecard, and the total of all the savings.

The receipt displays the scorecard according to the format specified in the Logix system. For more information, refer to *Creating a Discount Scorecard* on page 649.

Single Scorecard

In a transaction, if the customer avails of offers that are associated with a single scorecard, the scorecard is displayed in the receipt in the following manner:

```
********************************* RECEIPT PRINT *********************************
                                  Store: UESTORE
**********************************************************************************
huggies............................................5 x 8.00

chicken............................................5 x 9.00
     DISCOUNT.....................................1 x -1.99
          dollar Off


-------------------Transaction Discounts--------------------

Transaction DISCOUNT....................5 x -0.94
Transaction DISCOUNT....................5 x -1.06




Gross-Total      --                                   85.00
Total Discounts  --                                   11.99
------------------------------------------------------------
Total            --                                   73.01






-------------------Front Receipt Messages--------------------
Discount Scorecard Summary:
--------------------------------------------
Offer                            Savings Amount
--------------------------------------------
BasketDSCDesc                           $10.00
ItemDSCDesc                              $1.99
--------------------------------------------
Total                                   $11.99
--------------------------------------------

------------------------------------------------------------

[extension content start]

PromotionCode:0000000023 RedemptionQuantity:000001
PromotionCode:0000000024 RedemptionQuantity:000001

[extension content end]

**********************************************************************************
```

Note: This sample receipt does not display in an actual POS because it is only an internal POS receipt used for sample purposes.

Multiple Scorecards

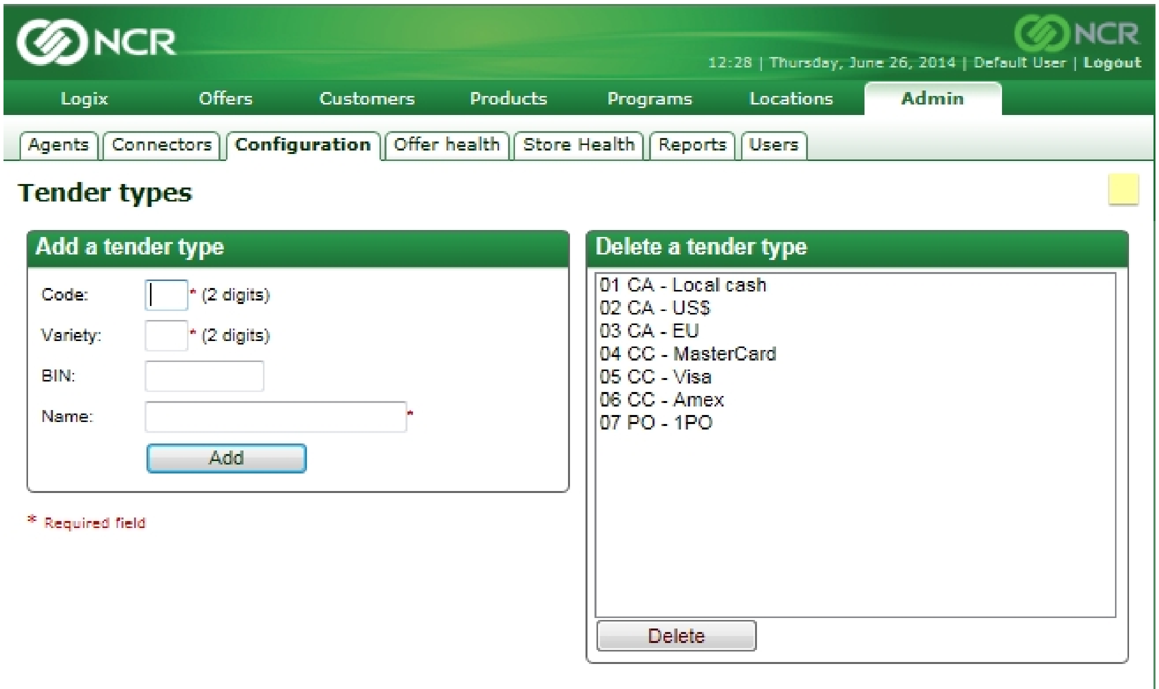
If the customer avails of multiple offers that are associated with different scorecards, the scorecards are displayed in the receipt in the following manner:

```
******************************** RECEIPT PRINT ********************************
                                 Store: UESTORE
********************************************************************************
huggies............................................5 x 8.00

chicken............................................5 x 9.00
     DISCOUNT.....................................1 x -1.99
          dollar Off


-------------------Transaction Discounts--------------------

Transaction DISCOUNT....................5 x -0.94
Transaction DISCOUNT....................5 x -1.06




Gross-Total      --                                    85.00
Total Discounts  --                                    11.99
------------------------------------------------------------
Total            --                                    73.01






-------------------Front Receipt Messages-------------------
Discount Scorecard Summary:
--------------------------------------------
Offer                        Savings Amount
--------------------------------------------
ItemDSCDesc                          $1.99
--------------------------------------------
Total                                $1.99
--------------------------------------------


--------------------------------------------
Offer                        Savings Amount
--------------------------------------------
BasketDSCDesc                       $10.00
--------------------------------------------
Total                               $10.00
--------------------------------------------

------------------------------------------------------------

[extension content start]

PromotionCode:0000000023 RedemptionQuantity:000001
PromotionCode:0000000024 RedemptionQuantity:000001

[extension content end]

********************************************************************************
```

Note: This sample receipt does not display in an actual POS because it is only an internal POS receipt used for sample purposes.

Tender Types

Tender types are payment methods that can be used in transactions, such as cash, check, Visa, and so forth. They can also be used as conditions for offers. From the Configuration page, select **Tender Types: CMTender Types: CPE/UE.** The Tender Types page is displayed.



The Tender Types page displays the following information fields:

Information Field/Box	Description
Code	A two–digit code that represents a general class of tender.
Variety	A two–digit code that represents a specific type of tender.
BIN	Bank Identification Number. It is an optional eight–digit number that represents a specific institution.
Name	Indicates the name of the tender type.
Delete a tender type	Displays available tender types.

From the Tender Types page, do any of the following:

- Create a tender type. For more information, refer to *Creating Tender Types* on the next page.
- Delete a tender type. For more information, refer to *Deleting Tender Types* on the next page.

Creating Tender Types

To create a tender type, follow these steps:

1. From the Tender Types page, enter the tender type details in the Add a tender type box. Ensure that the combination of code, variety, and bin number is unique for each tender type.

Note: Tender types for the CM engine require only a code (up to 5 digits) and name.

2. Select **Add**. The tender type is displayed in the Delete a tender type box.

Note: The tender type is immediately available for use.

Deleting Tender Types

To delete a tender type, follow these steps:

1. From the Tender Types page, select a tender type in the Delete a tender type box.

Note: A tender type currently used by one or more offers cannot be deleted.

2. Select **Delete**. A confirmation window is displayed.
3. Select **OK**.

Terminals

Terminals are points at which transactions can occur, and include regular checkout lanes, express lanes, customer service locations and other points of sale. From the Configuration page, select the **Terminals** button to access the Terminals page.

The Terminal page displays the following details:

Column Heading	Description
ID	Unique Identifier for Terminal created in Logix.
Code	Numeric identifier for the terminal.
Name	Name of the terminal.
Edited	The date and time the terminal details were last edited.

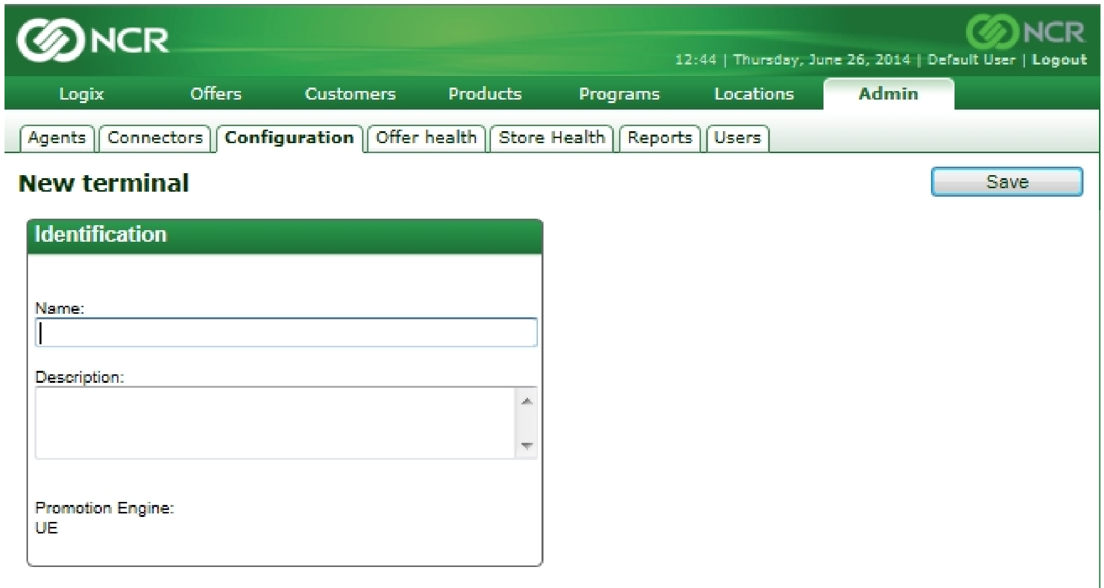
From the Terminals page, do any of the following:

- Create a terminal type. For more information, refer to *Creating Terminal Types* on the next page.
- Delete a terminal type. For more information, refer to *Deleting Terminal Types* on page 662.

Creating Terminal Types

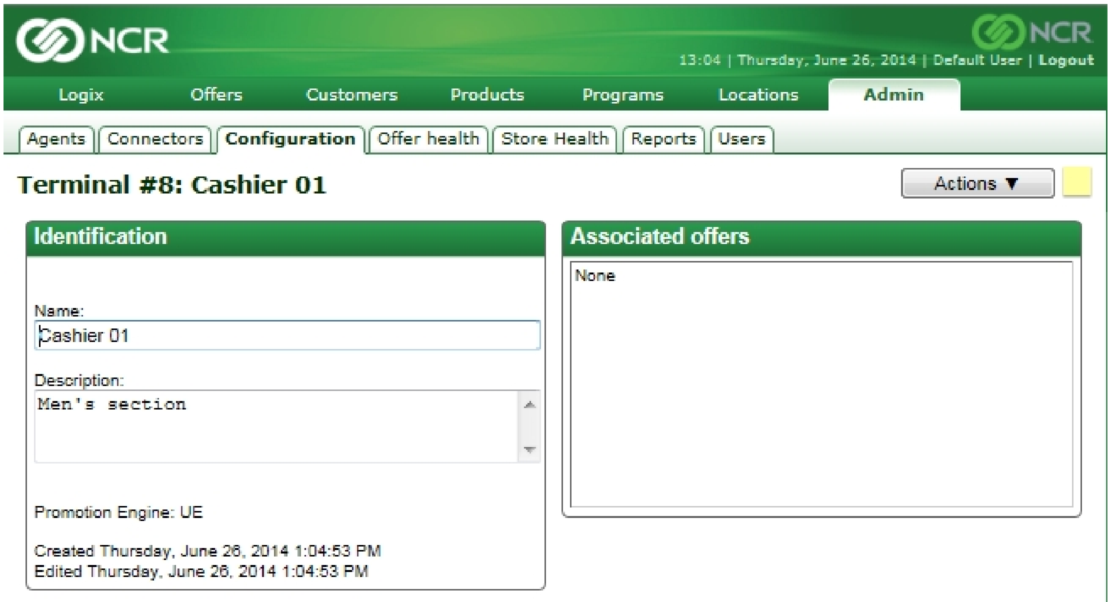
To create a terminal type, follow these steps:

1. From the Terminals page, select **New**. The New Terminal page is displayed.



2. Enter the following details:
   - **Code**
   - **Name**
   - **Description**

3. Select **Save**. The corresponding Terminal Configuration page is displayed.



4. Associate the terminal with an offer. For more information, refer to *Setting Terminal Locations* on page 356.

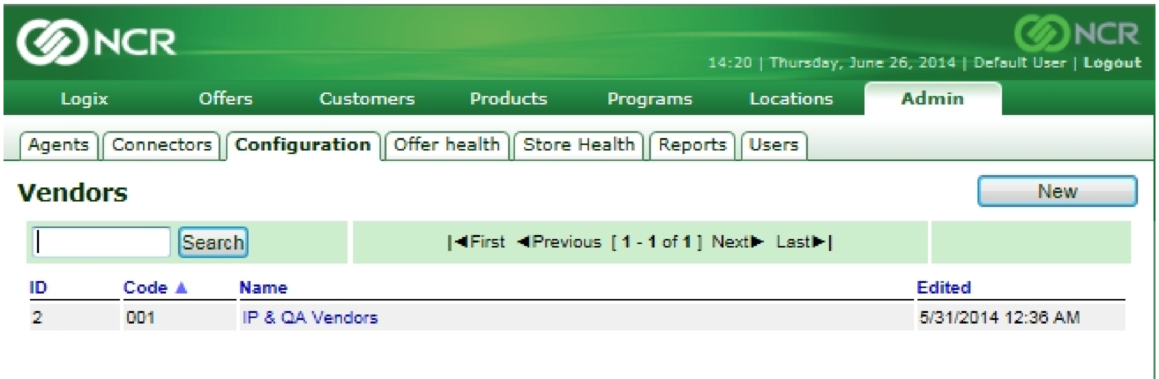
Deleting Terminal Types

To delete a terminal type, follow these steps:

1. From the Terminals page, select a terminal name. The corresponding Terminal Configuration page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**.

Chargeback Vendors

From the Configuration page, select the **Vendors** button to access the Chargeback Vendors page.



The Vendors page displays the following details:

Column Heading	Description
ID	Unique Identifier for Vendor created in Logix.
Code	Numeric identifier for the vendor.
Name	Name of the vendor.
Edited	The date and time the vendor details were last edited.

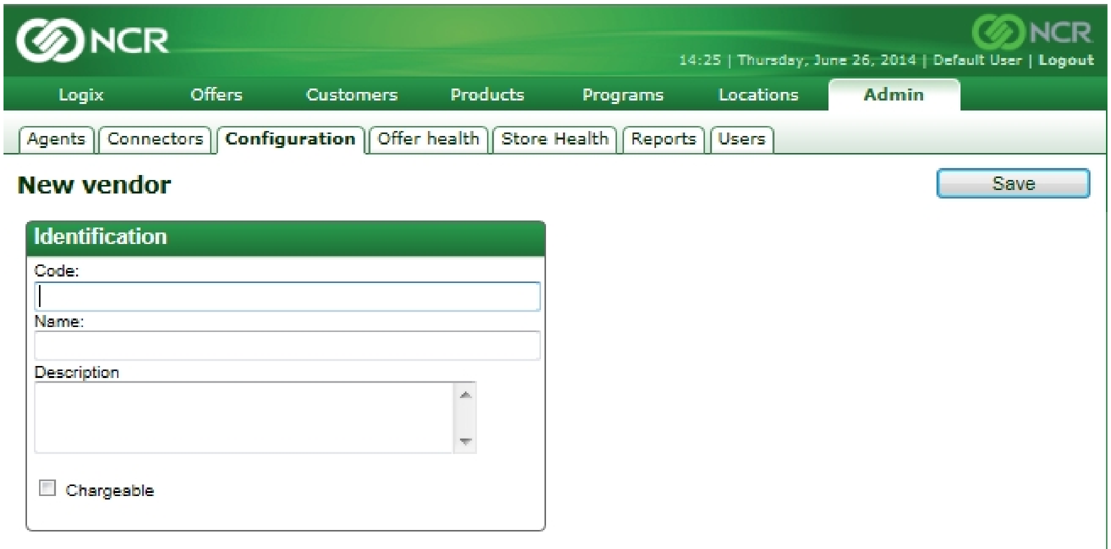
From the Vendors page, do any of the following:

- Create a vendor. For more information, refer to *Creating Chargeback Vendors* on the next page.
- Modify a vendor. For more information, refer to *Modifying Chargeback Vendors* on page 665.
- Delete a vendor. For more information, refer to *Deleting Chargeback Vendors* on page 665.

Creating Chargeback Vendors

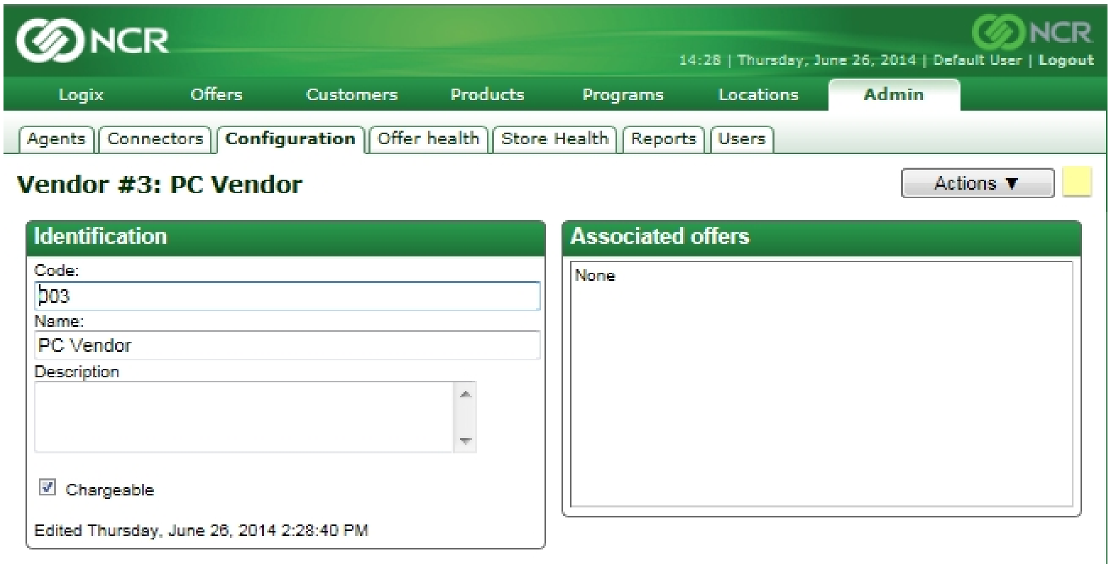
To create a chargeback vendor, follow these steps:

1. From the Vendors page, select **New**. The New Vendor page is displayed.



2. Enter the following details:
   - **Code**—numeric identifier for the vendor.
   - **Name**—name of the vendor.
   - **Description**—describes the vendor.
   - **Chargeable**—if selected, the vendor is displayed as an option from the Chargeback Vendor drop–down list in the Offer Configuration sub–page.

3. Select **Save**. The Vendor Configuration page is displayed.



Note: The Associated offers box displays a list of all offers that charge costs against the vendor. For more information, refer to *Defining Offer Parameters* on page 146.

Modifying Chargeback Vendors

To modify chargeback vendors, follow these steps:

1. From the Vendors page, select a vendor name. The corresponding vendor configuration page is displayed.
2. Modify the details in the Identification box.

Note: To associate the vendor with offers, refer to *Defining Offer Parameters* on page 146.

3. From the Actions menu, select **Save**.

Deleting Chargeback Vendors

To delete chargeback vendors, follow these steps:

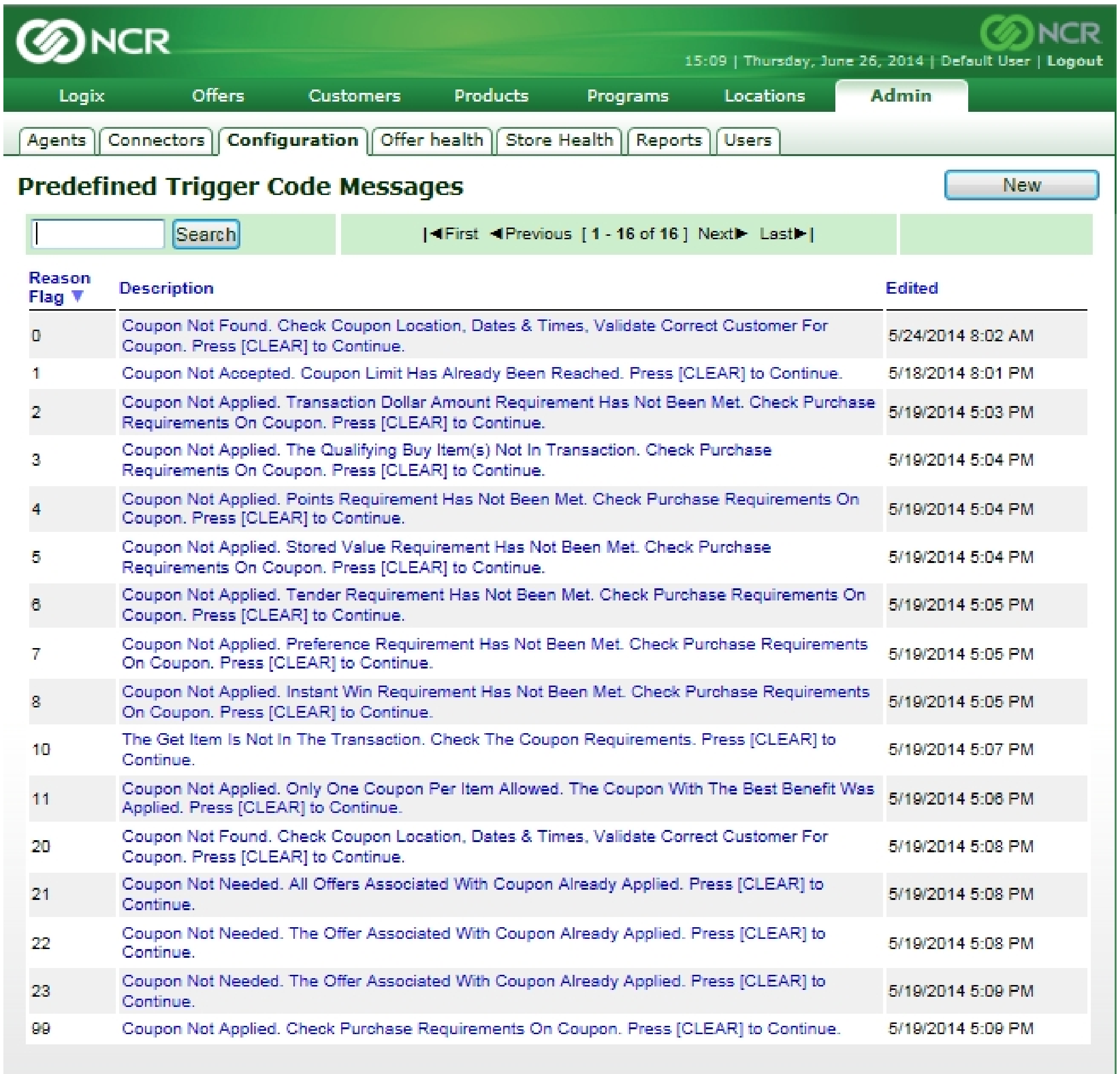
1. From the Vendors page, select a vendor name. The corresponding vendor configuration page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.

Note: Vendors associated with offers cannot be deleted. To remove an offer from the vendor, refer to *Defining Offer Parameters* on page 146.

3. Select **OK**.

Trigger Code Message

Trigger codes are UPCs that must be scanned during a transaction in order to meet an offer's conditions. They also inform the cashier to return the unused coupon to the customer if the code is scanned but the other associated conditions of the offer are not met. Trigger code messages are managed from the Admin Configuration Page by selecting the **Trigger Code Message** button.



Note: To associate trigger codes with offers, refer to *Setting Trigger Code Conditions* on page 247.

Reason Flags and Messages

Refer to the following table for a description of the predefined Reason Flags and their corresponding Trigger Code Messages for various offer setup combinations:

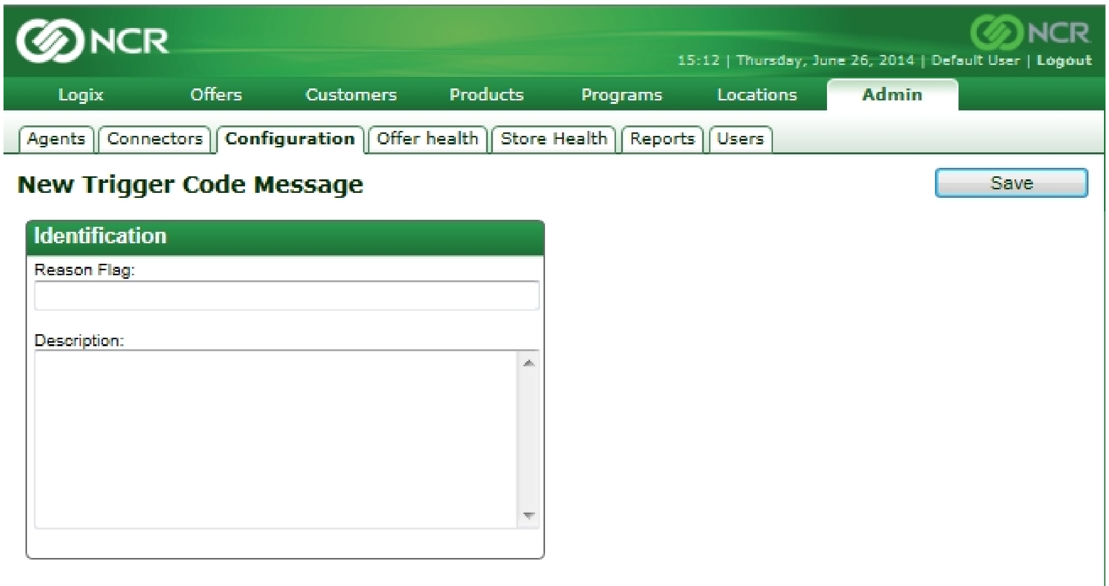
Reason Flag	Name	Trigger Code Message	Description
00		Coupon Not Found. Check Coupon Location, Dates, & Times. Validate Correct Customer For Coupon. Press [CLEAR] to Continue.	Displays when an active offer matches the trigger code during the transaction.
01	Offer Limit	Coupon Not Accepted. Coupon Limit Has Already Been Reached. Press [CLEAR] to Continue.	Displays when the trigger code is attached to an offer with a limit and the limit was met.
02	Item Value	Coupon Not Applied. Transaction Dollar Amount Requirement Has Not Been Met. Check Purchase Requirements on Coupon. Press [CLEAR] to Continue.	Displays when the trigger code is attached to an offer with a value limit and the value limit was not met.
03	Item Quantity	Coupon Not Applied. The Qualifying Buy Item(s) Not in Transaction. Check Purchase Requirements On Coupon. Press [CLEAR] to Continue.	Displays when the trigger code is attached to an offer with a quantity limit and the quantity limit was not met.
04	Points	Coupon Not Applied. Points Requirement Has Not Been Met. Check Purchase Requirements on Coupon. Press [CLEAR] to Continue.	Displays when the trigger code is attached to an offer with a point requirement and the point requirement was not met.
05	Stored Value	Coupon Not Applied. Stored Value Requirement Has Not Been Met. Check Purchase Requirements On Coupon. Press [CLEAR] to Continue.	Displays when the trigger code is attached to an offer with a stored value requirement and the stored value requirement was not met.
06	Tender	Coupon Not Applied. Tender Requirement Has Not Been Met. Check Purchase Requirements On Coupon. Press [CLEAR] to Continue.	Displays when the trigger code is attached to an offer with a tender requirement and the tender requirement was not met.

Reason Flag	Name	Trigger Code Message	Description
07	Preference	Coupon Not Applied. Preference Requirement Has Not Been Met. Check Purchase Requirements on Coupon. Press [CLEAR] to Continue.	Displays when the trigger code is attached to an offer with a preference requirement and the preference requirement was not met.
08	Instant Win	Coupon Not Applied. Instant Win Requirement Has Not Been Met. Check Purchase Requirements on Coupon. Press [CLEAR] to Continue.	Displays when the trigger code is attached to an instant win requirement and the instant win requirement was not met.
10	Discount	The Get Item Is Not In The Transaction. Check The Coupon Requirements. Press [CLEAR] to Continue.	Displays when the trigger code is attached to an offer with a discount reward and the discount reward could not be delivered.
11	Mutual Exclusion	Coupon Not Applied. Only One Coupon Per Item Allowed. The Coupon With The Best Benefit Was Applied. Press [CLEAR] to Continue.	Displays when the trigger code is attached to multiple offers and was not used.
20	Trigger Not Matched	Coupon Not Found. Check Coupon Location, Dates, & Times. Validate Correct Customer For Coupon. Press [CLEAR] to Continue.	Displays when no offers are active during the transaction to match the trigger code.
21	Multiple Offers	Coupon Not Needed. All Offers Associated With Coupon Already Applied. Press [CLEAR] to Continue.	Displays when trigger code is attached to multiple offers and was not used.
22	Trigger Not Needed	Coupon Not Needed. The Offer Associated With Coupon Already Applied. Press [CLEAR] to Continue.	Displays when the trigger code is attached to an offer, which has been earned in the transaction.
23	Invalid Code	Coupon Not Needed. The Offer Associated With Coupon Already Applied. Press [CLEAR] to Continue.	Displays when the trigger code is not used by any offer in the system.
99	Undetermined	Coupon Not Applied. Check Purchase Requirements On Coupon. Press [CLEAR] to Continue.	Displays when the reason that the trigger code was not used cannot be determined.

Creating Trigger Code Messages

To create a trigger code message, follow these steps:

1. From the Trigger Code Messages page, select **New**. The New Trigger Code Message is displayed.



2. Enter the reason flag and trigger code message in their corresponding text boxes. For more information, refer to *Reason Flags and Messages* on page 667.
3. Select **Save**. The Trigger Code Message page is displayed.

Modifying Trigger Code Messages

To modify a trigger code message, follow these steps:

1. From the Trigger Code Messages page, select a trigger code message. The corresponding Trigger Code Message page is displayed.
2. Modify the description.
3. From the Actions menu, select **Save** to apply the changes.

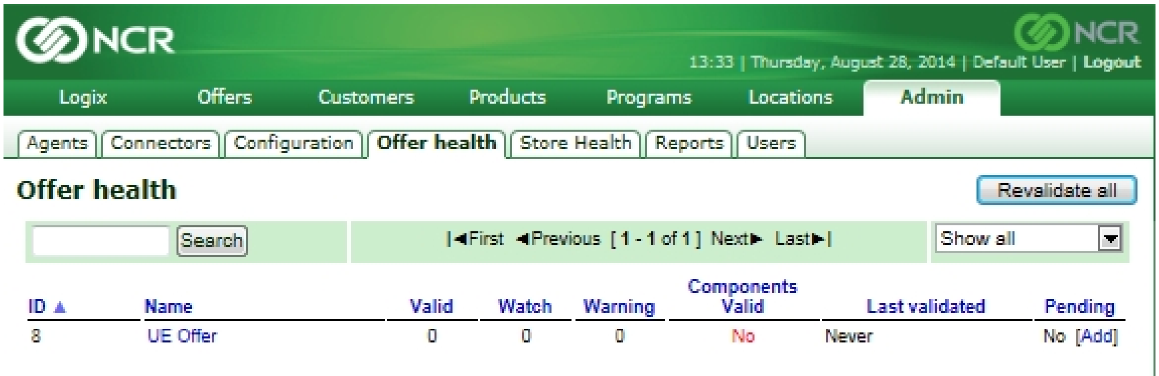
Deleting Trigger Code Messages

To delete a trigger code message, follow these steps:

1. From Trigger Code Messages page, select a trigger code message. The corresponding Trigger Code Message page is displayed.
2. From the Actions menu, select **Delete**. A confirmation window is displayed.
3. Select **OK**.

Offer Health

From the Admin main tab, select the **Offer Health** page tab to access the Store Health page and view the status of offer–related health issues.



The Offer Health page displays the following details:

Column Header	Description
ID	Indicates the offer ID.
Name	Indicates the offer name.
Valid	Indicates the number of locations the offer is associated with to which deployment is successful.
Watch	Indicates locations for which the server times do not match, but the difference is within the grace period.
Warning	Indicates locations for which the server times do not match, and the difference exceeds the grace period.
Components Valid	Indicates the following: • **Yes**—all components of the offer are valid. • **No**—at least one component of the offer is invalid. **Example:** Components can be product groups, customer groups, stores, and so forth.
Last Validated	The date and time the offer was last validated.
Pending	Indicates whether the offer validation is pending. **Note:** By default, all offers are automatically validated once a day. Selecting **Add** puts the offer in a queue for quicker validation.

To control the data displayed on the Offer Health page, use the following filter controls from the drop–down list on the top–right area of the table:

- **Show all**—displays offers with valid and invalid components, and with or without warning locations.
- **Show valid only**—displays only offers that have valid offer components without warning locations.
- **Show invalid only**—displays only offers that have invalid offer components, or those with one or more warning locations.
- **Show CRM offers**—displays offers that are either going out to or coming in from an external CRM service.

Note: This filter is only available if the Logix installation has enabled external CRM integrations.

Store Health

From the Admin main tab, select the **Store Health** page tab to access the Store Health page and view the summary of store–related health issues, including known errors per location; and enable or disable reports and alerts per location.

Note: Logix displays the Store Health page tab if the system is in a non–enterprise mode or if the **Operate at enterprise** option is set to No. For more information, refer to *Miscellaneous Options* on page 734.

Select the **Logs** button to display the Log File Viewer, which shows the log files associated with connectors. For more information, refer to *Log Files* on page 801.

Note: The data displayed on the Store Health page depends on the store associated with the promotion engine.

The Store Health page displays the following details:

Column Header	Description
Plus sign	Displays the following details about each reported error for the selected location: • **Severity**—indicates the severity of each error as High, Medium, or Low • **From**—indicates whether the errors are associated with the local server or central server • **Error Code**—unique error identifier. An example of a local server error is “LS42” and central server error is “CS10.” Note: Selecting an ID displays details and possible resolutions for the error. • **Description**—displays a summary of the error • **Duration**—indicates the period during which the error condition is in effect
Store Code	Indicates the store code defined by the retailer.
Store ID	Indicates the identification number assigned by Logix to the store.
LSID	Indicates the identification number of the store’s local server.
Severity	Indicates the severity of the most severe error reported for the location: • High • Medium • Low
Errors	Displays the number of errors associated with the local server and central server based on severity.
Report	Displays an icon that determines whether reports associated with the location causes the following: • The store is displayed in a list of locations with errors. • The store is displayed with a red highlight in broader lists of stores.
Alert	Displays an icon that determines whether errors associated with the located generates alert emails. Stores appear with a red highlight if they have at least one reported error and reporting is not disabled.

To control the data displayed on the Store Health page, use the following filter controls from the drop–down list on the top–right area of the table:

- **Show All**—displays all stores.
- **Communications OK**—displays only stores that are identified as communicating and checking in properly by monitoring TransUpload, TransDownload, LastHeard, IncentiveFetch, and SanityCheck.
- **All errors**—displays only stores that have at least one reported error.
- **All active failovers**—displays only active failover servers with the last IP address of each server.
- **Failover History**—displays a history of active failover servers and their corresponding last IP address.
- **All failovers**—displays active and inactive failover servers with the last IP address of each server.
- **IPL Needed Yes**—displays stores that need Initial Program Load (IPL).
- **Show Active Locations**—displays locations that have a local server.

Server Health

The Server Health page permits users to track the status of the following enterprise server components:

Component	Description
Promotion Broker	Contains information on the engine details, alive or not, last sync time, and pending files.
Customer Broker	Contains information about when the engine did the last customer lookup and transupload.
Enterprise Promotion Engine	Processes enterprise transactions.
Store Promotion Engine	Processes store transactions.

Note: Ensure that these components are installed in order to use the Server Health feature. For more information about these components, contact an NCR Professional Services Representative.

Although Health Service can be installed on any broker nodes, it is recommended to have it installed on a separate machine. Depending on the number of components and the frequency with which Health Service is monitoring the components, the load on the machine can be huge.

Server Health Sub–pages

The Server Health page displays the summary of server–related health issues, including known errors per location. It permits users to enable or disable reports and alerts per location. Logix permits users to send email alerts to users who have subscribed for email notifications for node and engine errors.

The Server Health page tab consists of the following set of sub–pages:

Sub–page	Description
Summary	Displays a high–level detail of the server performance. For more information, refer to *Server Health Summary* on page 678.
Node Health	Displays the number of nodes connected to the server, errors (if any), and the duration since the error occurred. For more information, refer to *Node Health* on page 681.
Engine Health	Displays the number of engines connected to stores, errors (if any), and the duration since the error occurred. For more information, refer to *Engine Health* on page 690.

Enabling Server Health

To enable the Server Health feature, follow these steps:

1. Create a server. For more information, refer to *Creating Servers* on page 541.
2. Install Health Service. For more information, contact an NCR Professional Services Consultant.
3. Install Promotion Broker and Customer Broker. For more information, contact an NCR Professional Services Consultant.
4. Configure the following Miscellaneous UE Settings:
   - Operate at Enterprise
   - User Server Health Service

   For more information, refer to *Miscellaneous Options* on page 734.
5. Configure the following Server Health UE Settings:
   - Server Health Service URL
   - High severity threshold (in minutes)
   - Medium severity threshold (in minutes)

   For more information, refer to *Server Health Options* on page 733.
6. Configure the following options that are related to the Alert email trigger for Server Health:
   - Notification Service
   - Logix External URL

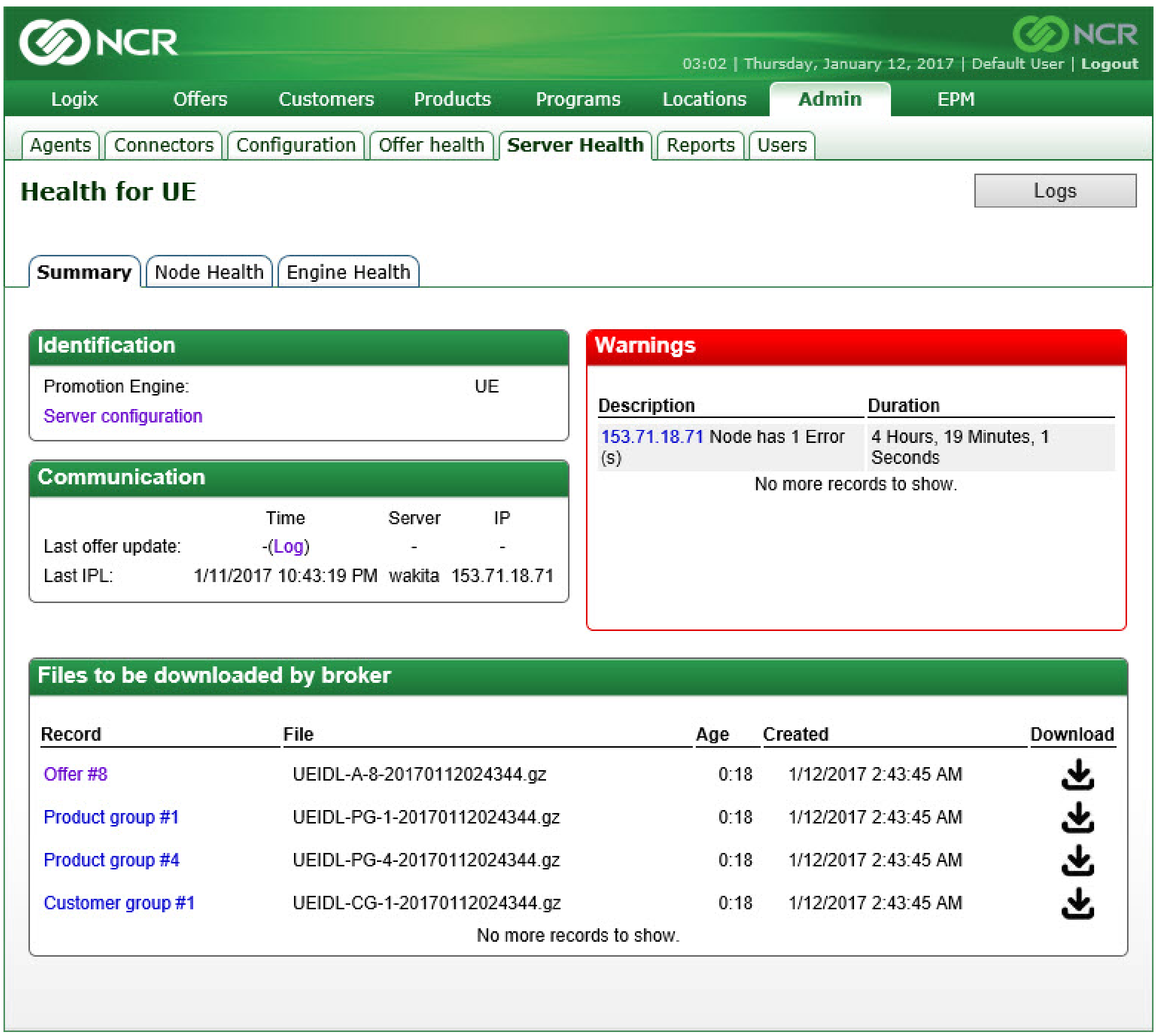
   For more information, refer to *General Options* on page 716.

Server Health Summary

The Server Health Summary sub–page displays a high–level detail of server performance. Typically, a server is connected to a cluster of nodes, which can have both or any of the promotion broker and customer broker pairs. The cluster of nodes provide offer data and customer–related data to the promotion engines.

Accessing the Server Health Summary sub–page

From the Admin main tab, selecting the **Server Health** page tab displays the Server Health Summary sub–page by default.



Note: Select the **Logs** button to display the Log File Viewer, which shows the log files associated with connectors. For more information, refer to Log Files on page 801.

The Server Health Summary sub–page displays the following sections:

Section	Description
Identification	Displays high–level information about the server: • **Promotion Engine**—displays the promotion engine type. • **Server configuration**—holds a link to the server configuration.
Communication	Displays three columns (Time, Server, and IP) for the following information: • **Last offer update**—displays the date and time, server name, and server IP address where the broker last updated the offer information from Logix (Incentive Fetch). **Note:** Selecting the Log link displays the log files associated with UE–IncentiveFetchLog. • **Last IPL**—displays the date and time, server name, and server IP address of the last Initial Program Load (IPL). **Note:** IPL occurs when a store is set up for the first time and then, brokers fetch all the promotion load from Logix.
Warnings	Displays the nodes or engines that have errors: • **Description**—displays the links of nodes and engines • **Duration**—displays the number of hours, minutes, and seconds since the error occurred.
Files to be downloaded by broker	Displays information about the files that are yet to be downloaded to the server: • **Record**—displays a link that holds the file. • **File**—displays the file name. • **Age**—displays the age of the file. • **Created**—displays the timestamp when the file was created. • **Download**—displays an icon to download the file.

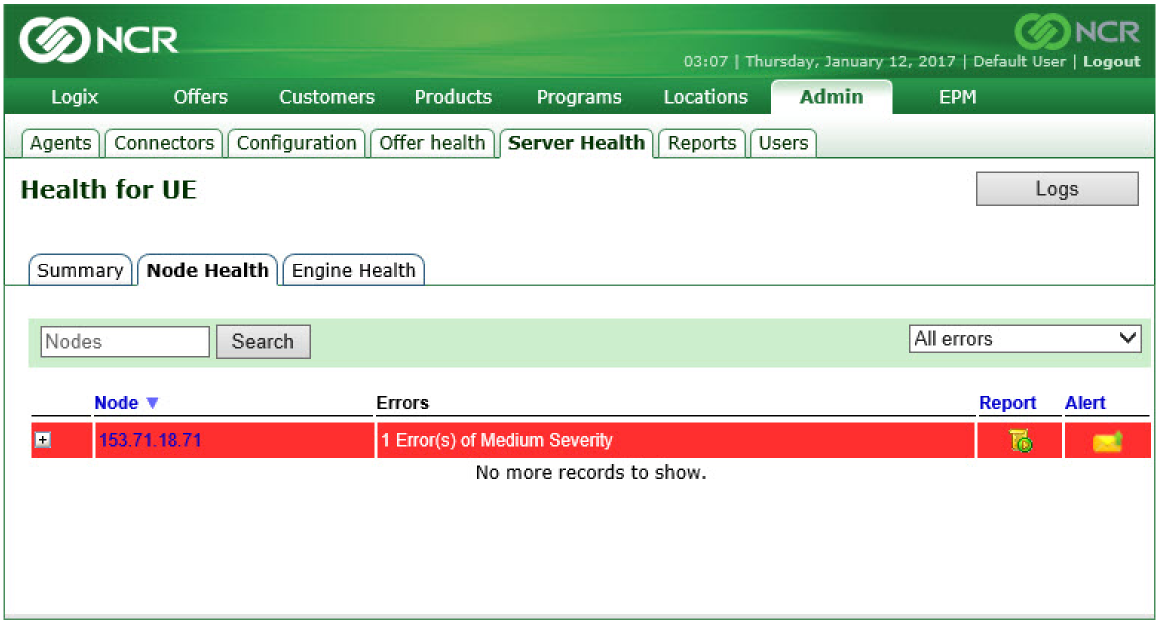
Using the Server Health Summary Sub–Page

From the Server Health Summary sub–page, do any of the following:

- Select the **Logs** button to display the Log File Viewer, which shows the log files associated with connectors. For more information, refer to *Log Files* on page 801.
- Select the Server configuration link to access the Server Configuration sub–page. For more information, refer to *Accessing Server Configuration* on page 539.
- Select a Node IP address to access the Node Health Summary sub–page. For more information, refer to *Accessing the Node Health Sub–Page* on page 682.

Node Health

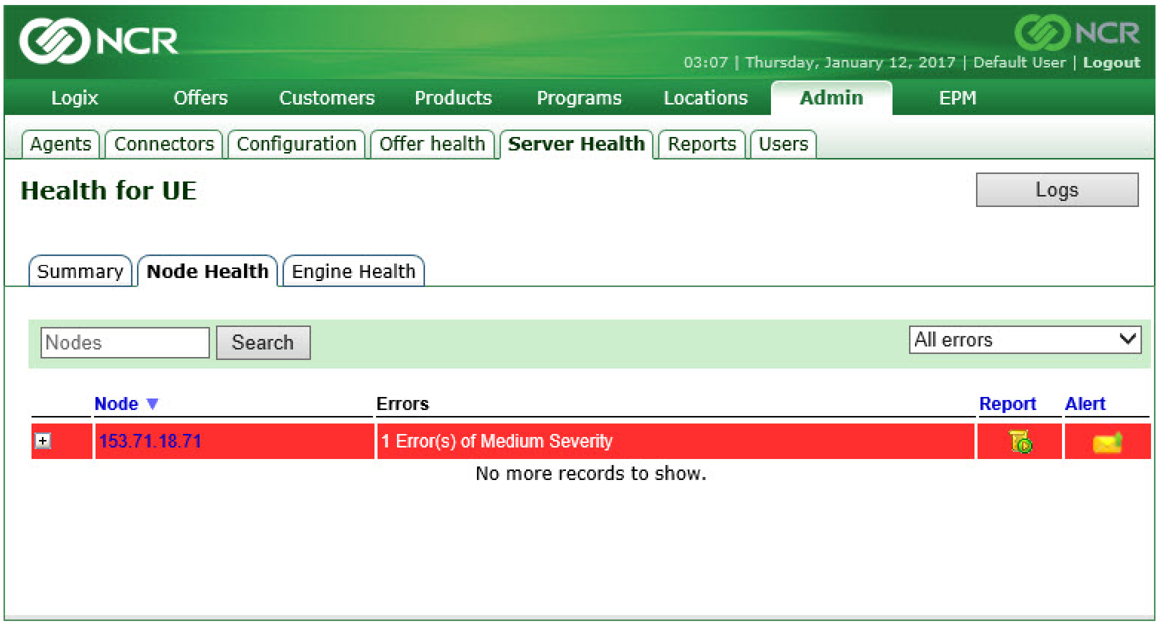
The Node Health sub–page displays a list of nodes in the cluster and the brokers installed in each node. The cluster of nodes provide offer data and customer–related data to the promotion engines. A node can have both; or either a promotion broker or customer broker.



Accessing the Node Health Sub–Page

The Node Health sub–page displays a list of nodes in the cluster and the brokers installed in each node. The cluster of nodes provide offer data and customer–related data to the promotion engines. A node can have both; or either a promotion broker or customer broker.

From the Admin main tab, select the **Server Health** page tab and then the **Node Health** sub–page tab. The Node Health sub–page is displayed.



Note: Select the **Logs** button to display the Log File Viewer, which shows the log files associated with connectors. For more information, refer to *Log Files* on page 801.

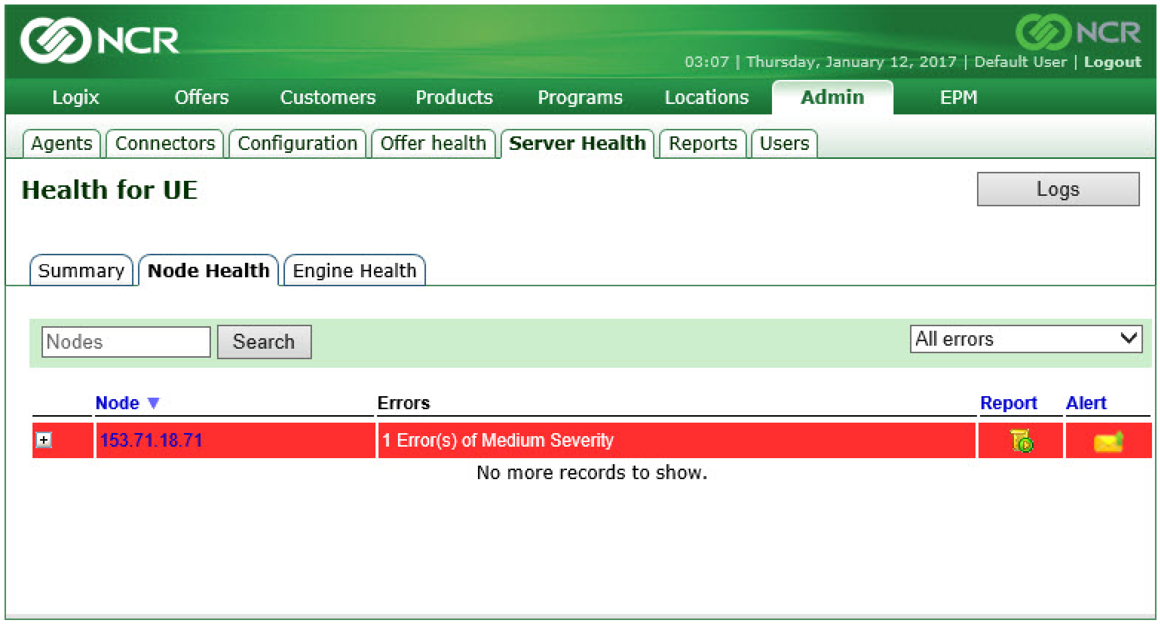
The Node Health sub–page displays the following details:

Column Header	Description
Plus sign	When selected, expands the node and displays the following details about each reported error for the selected location: • **Severity**—indicates the severity of each error as High, Medium, or Low. • **Code**—unique error identifier. For more information, refer to *Codes* on page 696. **Note:** Selecting an ID displays details and possible resolutions for the error. For more information, refer to *Using the Resolution Window* on page 698. • **Description**—displays a summary of the error. • **Duration**—indicates the period during which the error condition is in effect.
Node	Indicates the node.
Errors	Displays the number of errors associated with the local server and central server based on severity.
Report	Displays an icon that permits users to track the health of engines: • If enabled, the icon is overlaid with a green circle indicating that the health of the node and errors that may occur are tracked. Errors are displayed with red highlight based on their severity. • If disabled, the icon is overlaid with a red No symbol indicating that the health of the node and errors that may occur are not tracked.
Alert	Displays an icon that determines whether errors associated with the location generates alert emails.

Using the Node Health sub–page

To perform tasks in the Node Health sub–page, follow these steps:

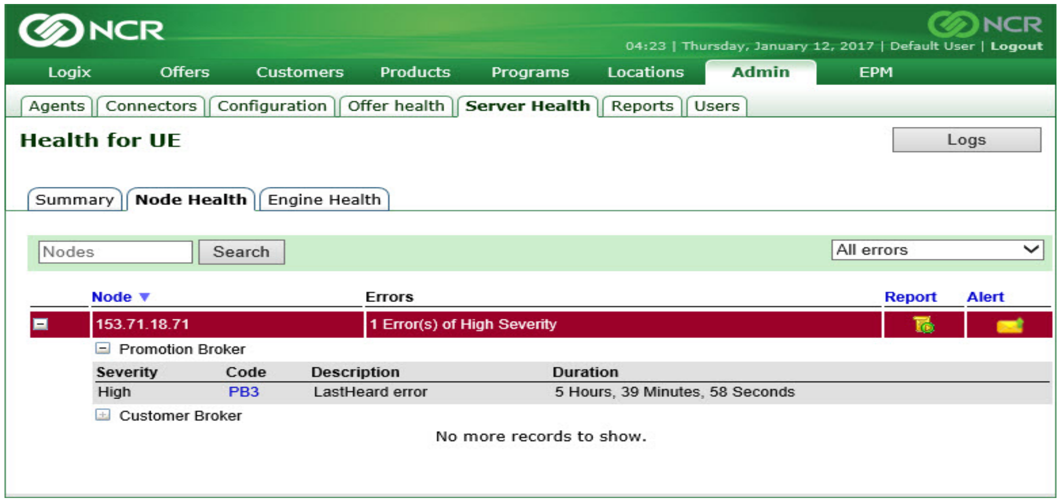
1. From the Server Health page, select the **Node Health** sub–page tab. The Node Health sub–page is displayed.



2. To control the data displayed on the Node Health sub–page, use the following filter controls from the drop–down list on the top–right area of the table:
   - **All errors**—displays only nodes that have at least one reported error.
   - **Show All**—displays all nodes connected to the server.
   - **Disconnected Nodes**—displays all nodes disconnected from the server.
   - **Communications OK**—displays only nodes that are identified as communicating and checking in properly by monitoring TransUpload, TransDownload, and LastHeard.

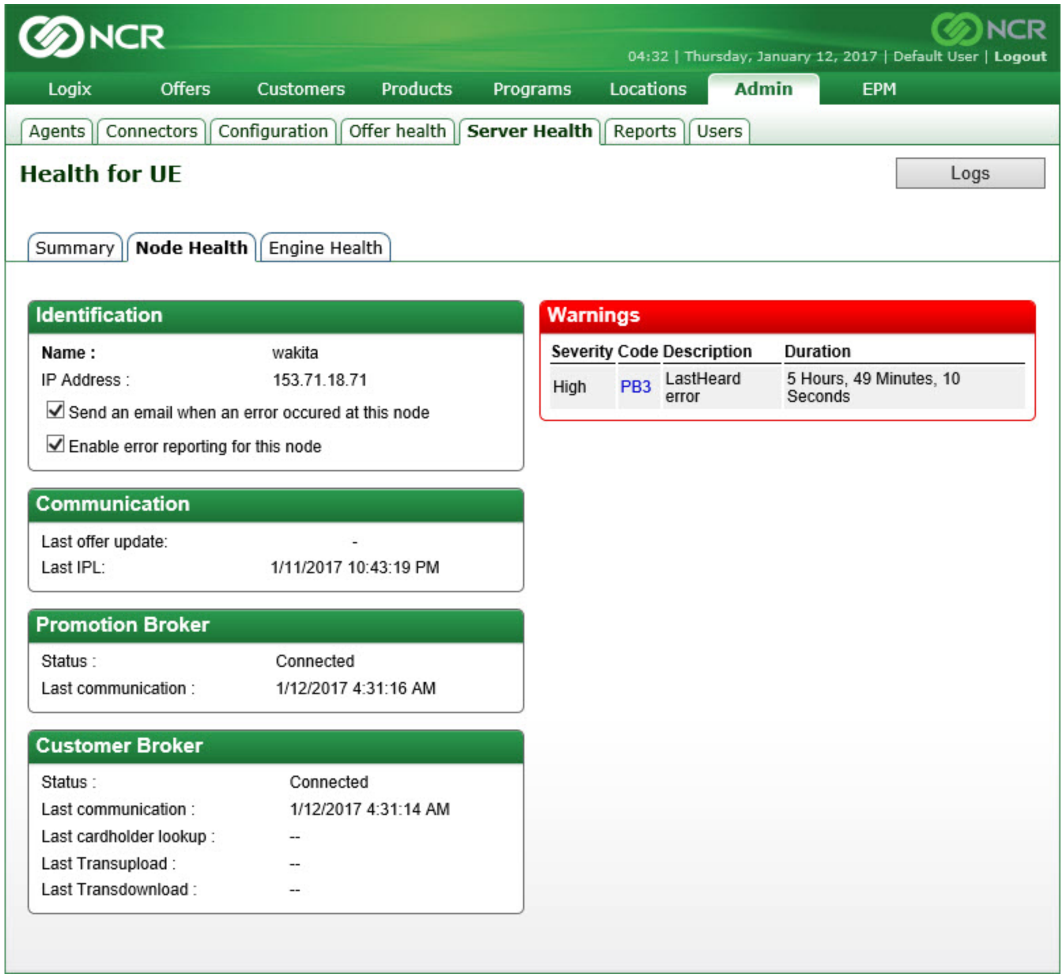
3. Do any of the following:

   - Expand the corresponding **+** button of a Node. The corresponding brokers are displayed.



Note: Selecting a code displays the details and possible resolutions for the error. For more information, refer to *Using the Resolution Window* on page 698.

- Select an IP address from the Node column. The Node Health Summary sub–page is displayed.

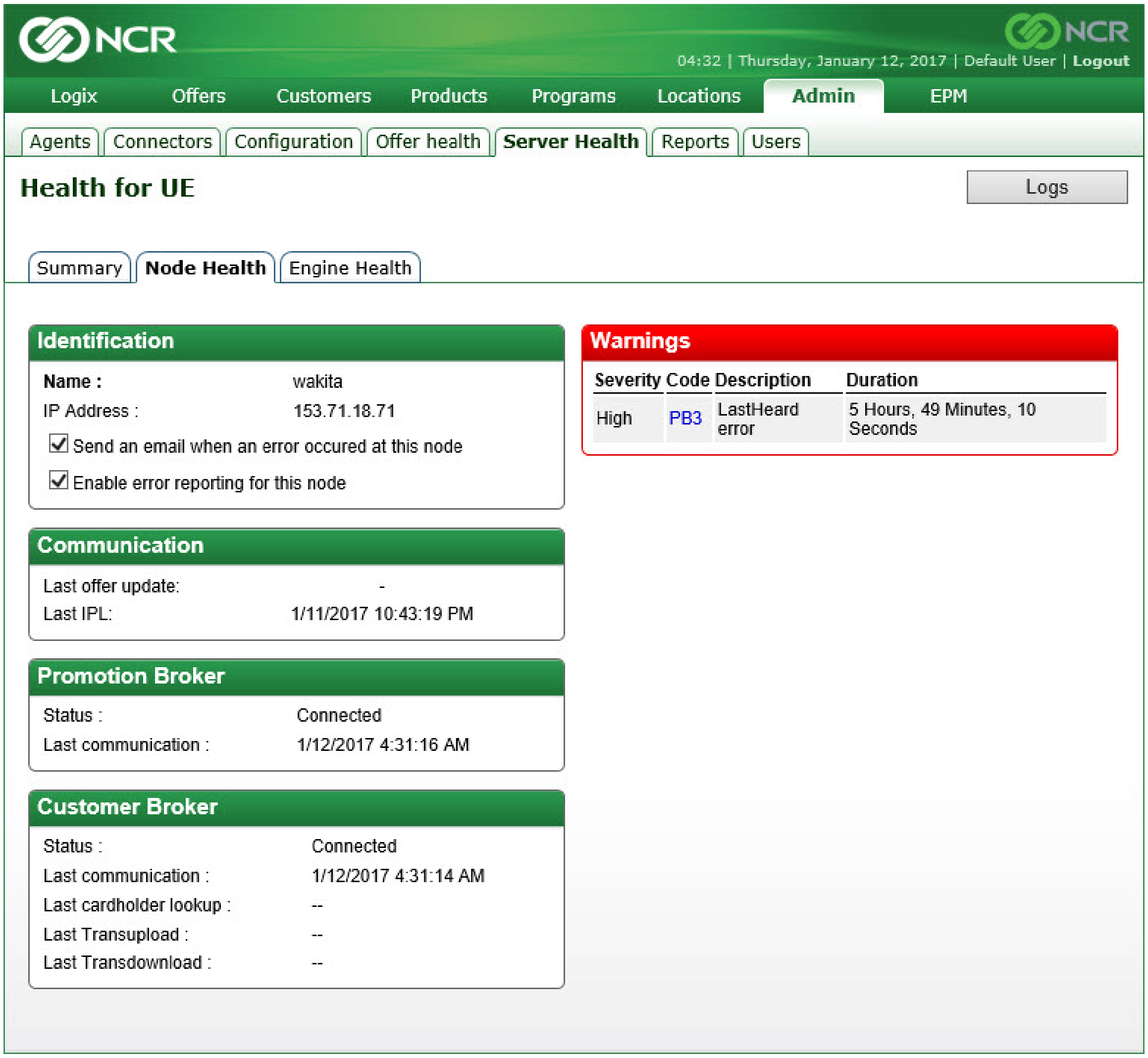


For more information about this page, refer to *Using the Node Health Summary sub–page* on the facing page..

4. In the Warning section of the Node Health Summary sub–page, select a Code link to display the Resolution window. For more information, refer to *Using the Resolution Window* on page 698.

Using the Node Health Summary sub–page

The Node Health Summary sub–page is displayed after selecting an IP address from the Node column of the Node Health sub–page.



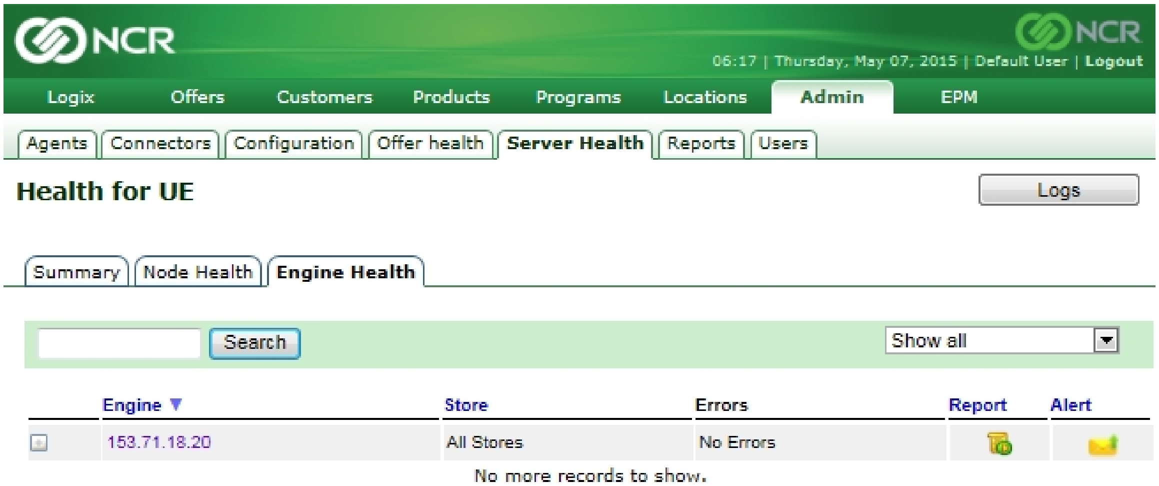
The Node Health Summary sub–page displays the following sections:

Section	Description
Identification	Displays high–level information about the node: • **Name**—refers to the name of the node. • **IP Address**—refers to the IP address of the node. This section also displays the following options: • **Send an email when an error occurred at this node**—sends error messages to the assigned email. For more information, refer to *Setting Email Alerts* on page 582. • **Enable error reporting for this node**—allows reports associated with the node to display in a list of locations with errors or display with a red highlight in broader lists of stores.
Communication	Displays the following information: • **Last offer update**—displays the date and time when the last offer update was executed on the node. • **Last IPL**—displays the date and time when the last Initial Program Load (IPL) was executed on the node.
Promotion Broker	Displays the following information: • **Status**—refers to the connection status. • **Last communication**—displays the date and time when the last communication occurred between the promotion broker and the node.
Customer Broker	Displays the following information: • **Status**—refers to the connection status. • **Last communication**—displays the date and time when the last communication occurred between the customer broker and the node. • **Last cardholder lookup**—displays the date and time when the last cardholder lookup occurred. • **Last Transupload**—displays the date and time when the last Transupload occurred. • **Last Transdownload**—displays the date and time when the last Transdownload occurred.
Warnings	Displays the node errors and the following information: • **Severity**—indicates the severity of each error as High, Medium, or Low.

Section	Description
	• **Code**—refers to the corresponding error code. Selecting the code displays the details and possible resolutions for the error. For more information, refer to *Using the Resolution Window* on page 698. • **Description**—describes the error. • **Duration**—displays the number of hours, minutes, and seconds since the error occurred.

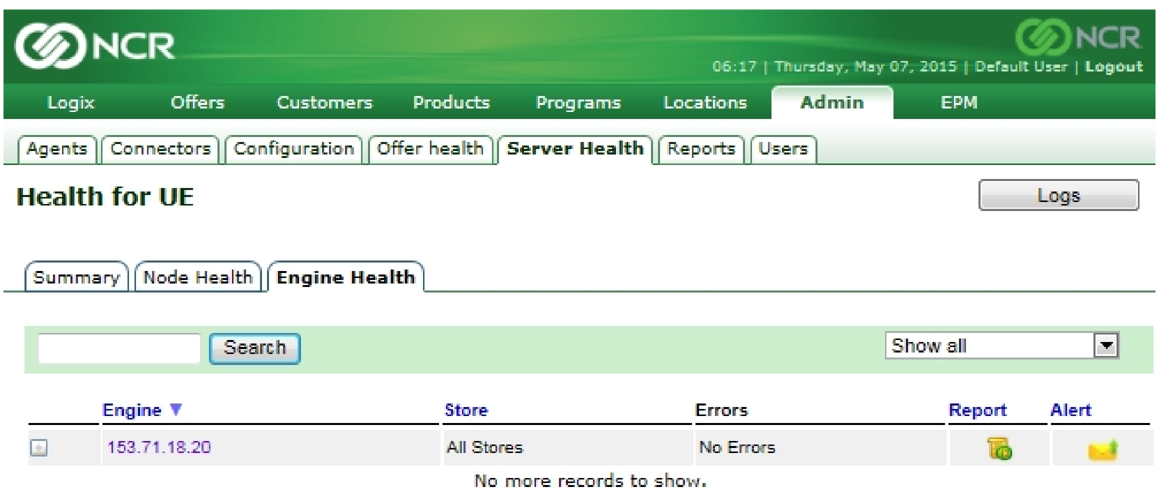
Engine Health

The Engine Health page displays the summary of engine–related health issues, including known errors per location, and enable or disable reports and alerts per location.



Accessing the Engine Health page

Select the Engine Health sub–page tab. The Engine Health sub–page is displayed.



The Engine Health sub–page displays the following details:

Column Header	Description
Plus sign	When expanded, it displays the following details about each reported error for the selected location: • **Severity**—indicates the severity of each error as High, Medium, or Low • **Error Code**—unique error identifier. For more information, refer to *Codes* on page 696. **Note:** Selecting an ID displays details and possible resolutions for the error. • **Description**—displays a summary of the error • **Duration**—indicates the period during which the error condition is in effect
Engine	Indicates the engine.
Store	Indicates the store code defined by the retailer.
Errors	Displays the number of errors associated with the engine based on severity: • High • Medium • Low
Report	Displays an icon that permits users to track the health of engines: • If enabled, the icon is overlaid with a green circle indicating that the health of the engine and errors that may occur are tracked. Errors are displayed with red highlight based on their severity. • If disabled, the icon is overlaid with a red No symbol indicating that the health of the engine and errors that may occur are not tracked.
Alert	Displays an icon that determines whether errors associated with the engine generates alert emails.

Using the Engine Health sub–page

To perform tasks in the Engine Health sub–page, follow these steps:

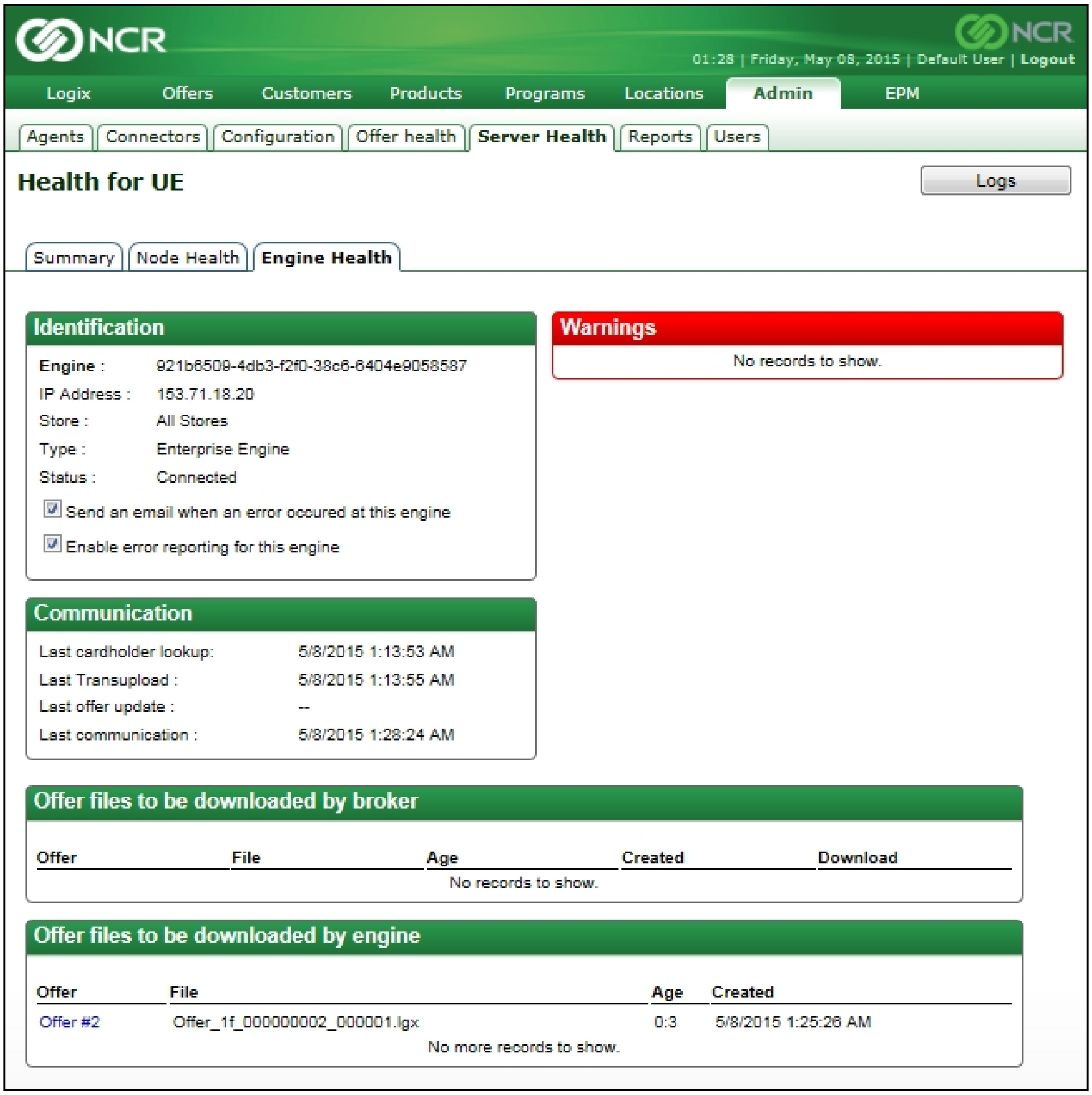
1. From the Server Health page, select the Engine Health sub–page tab. The Engine Health sub–page is displayed.

Note: Select the **Logs** button to display the Log File Viewer, which shows the log files associated with connectors. For more information, refer to *Log Files* on page 801.

2. To control the data displayed on the Engine Health sub–page, use the following filter controls from the drop–down list on the top–right area of the table:

   - **All errors**—displays engines that have at least one reported error.
   - **Show All**—displays all stores connected to the server.
   - **All Enterprise Engines**—displays a list of enterprise engines.
   - **All Store Engines**—displays a list of store engines.
   - **Disconnected Engines**—displays a list of engines that are disconnected from the server.
   - **Communications OK**—displays only engines that are identified as communicating and checking in properly by monitoring TransUpload, TransDownload, LastHeard, IncentiveFetch, and SanityCheck.

3. Select an IP address from the Engine column. The Engine Health Summary sub–page is displayed.



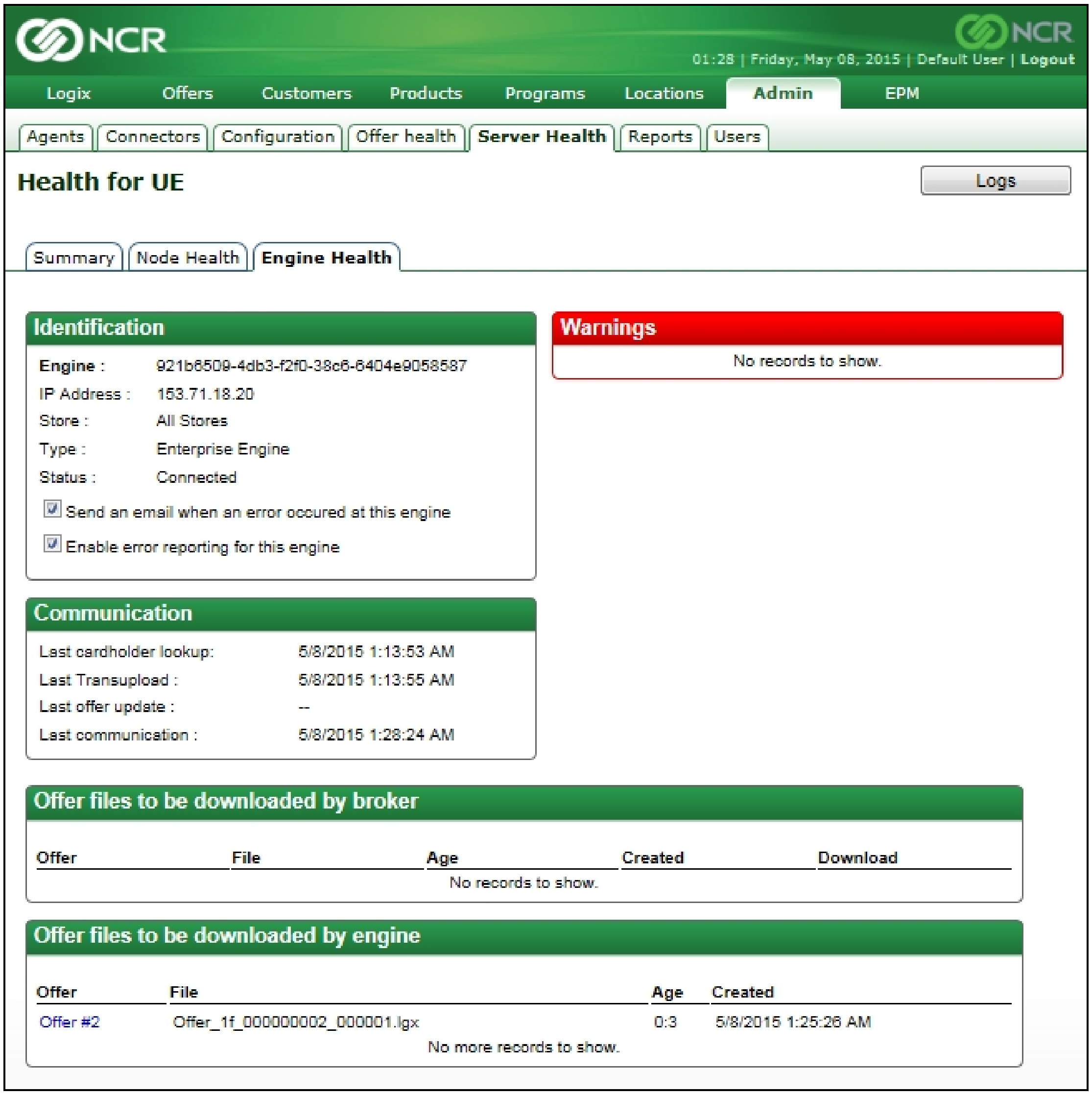
For more information about using this page, refer to <u>*Using the Engine Health Summary sub–page*</u> on the next page.

4. Select a Code link in the Warning section to display the Resolution window. For more information, refer to <u>*Using the Resolution Window*</u> on page 698.

5. Select an offer link in the Offer columns to display the Offer Summary sub–page. For more information, refer to <u>*Offer Summary Sub–page*</u> on page 53.

Using the Engine Health Summary sub–page

The Engine Health Summary sub–page is displayed after selecting an IP address from the Engine column of the Engine Health sub–page.



The Engine Health Summary sub–page displays the following sections:

Section	Details
Identification	Displays the following information: • **Engine**—refers to the engine code or name. • **IP Address**—refers to the IP address of the engine. • **Store**—indicates the stores associated with this engine. • **Type**—refers to the type of the engine. • **Status**—indicates the connection status of the engine. This section also displays the following options: • **Send an email when an error occurred at this engine**—sends error messages to the assigned email. For more information, refer to *Setting Email Alerts* on page 582. • **Enable error reporting for this engine**—allows reports associated with the engine to display in a list of locations with errors or display with a red highlight in broader lists of stores.
Communication	Displays the following communication details: • Last cardholder lookup • Last Transupload • Last offer update • Last communication
Warnings	Displays a list of warning for the engine: • Error Severity • Error Code • Resolution Link • Duration since the error started **Note:** Select an error code link to display the Resolution window. For more information, refer to *Using the Resolution Window* on page 698.
Offer files to be downloaded by broker	Displays pending offer files, product group files, customer group files, or general files to be downloaded by the broker. **Note:** Oldest file is displayed first.
Offer files to be downloaded by engine	Displays pending offer files to be downloaded by the engine. **Note:** Oldest file is displayed first.

Codes

Codes are unique error identifiers. When an error has occurred, selecting the corresponding code displays details and possible resolutions for the error.

For information on using this window, refer to *Using the Resolution Window* on page 698.

Parameter IDs

Refer to the following table for a list of Parameter IDs and their descriptions:

Parameter ID	Description	Component Name
PB1	Alive or Dead	Promotion Broker
PB2	Cluster Issue	Promotion Broker
PB3	Last IPL	Promotion Broker
PB4	Last Incentive Fetch	Promotion Broker
CB1	Alive or Dead	Customer Broker
CB2	Last Transaction Upload	Customer Broker
CB3	Last Transaction Download	Customer Broker
CB4	Last Customer Lookup	Customer Broker
EE1	Alive or Dead	Enterprise Promotion Engine
EE2	Last Sync	Enterprise Promotion Engine
EE3	Last Customer Lookup	Enterprise Promotion Engine
EE4	Last Transaction Upload	Enterprise Promotion Engine
PE1	Alive or Dead	Promotion Engine – Enterprise
PE2	Last Sync	Promotion Engine – Enterprise
PE3	Last Customer Lookup	Promotion Engine – Enterprise
PE4	Last Transaction Upload	Promotion Engine – Enterprise

Error Codes

Refer to the following table for the Server Health Error Codes:

Error Code	Description
200	OK
500	Error

Using the Resolution Window

The Resolution window is displayed when a code is selected from any of the Server Health sub–pages.

The Resolution window displays the following sections:

- **Definition**—describes the error and permits users to record how they solved the error.
- **Resolutions**—displays recorded resolutions and the user name including the date and time when the resolution was submitted. For more information, refer to *Creating Error Resolutions* on the facing page.
- **New resolution**—permits users to record how they solved the error. For more information, refer to *Modifying Error Resolutions* on page 700.

Creating Error Resolutions

To create error resolutions, follow these steps:

1. From any of the Server Health sub–pages, select a code link. The Resolution window is displayed.

2. In the New resolution section, do the following:
   - Enter the resolution **Title**.
   - Enter the **Text** description of the resolution.
3. Select **Save**. The resolution details are displayed in the Resolutions section.

Modifying Error Resolutions

To modify error resolutions, follow these steps:

1. From any of the Server Health sub–pages, select a code link. The Resolution window is displayed.

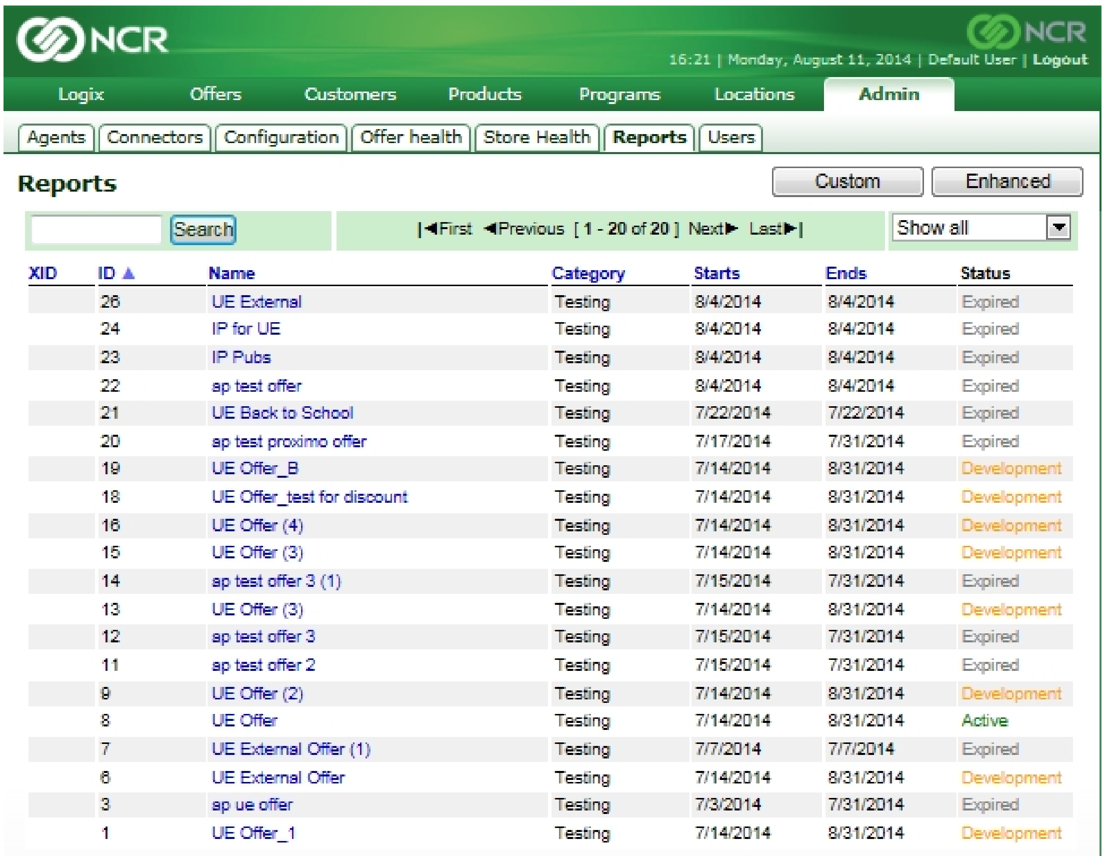
2. From the Resolutions section, determine the error resolution to modify and then select the corresponding **Edit** button.
3. Modify the resolution and then select **Save**.

Note: Select the corresponding red x button to delete a resolution.

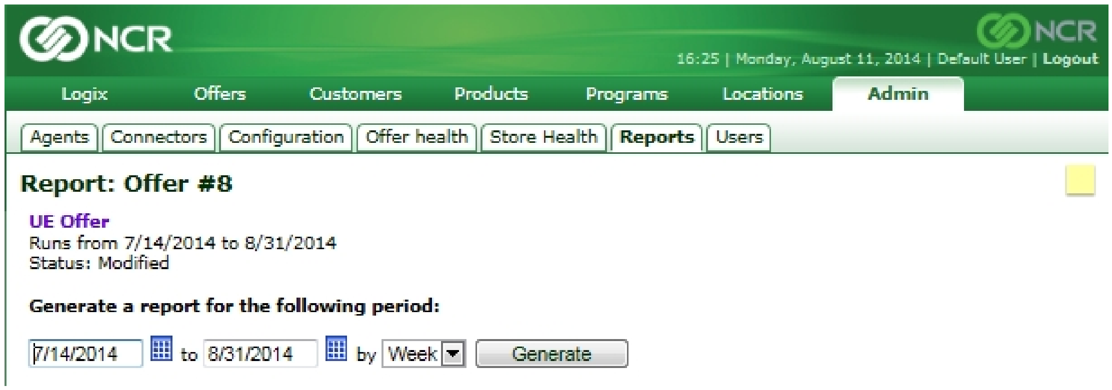
Generating Performance Reports

Logix can generate a report about the performance of an offer. The report shows impression, redemption, and markdown figures in both daily and cumulative form. It can also display a graphic representation of the data. To generate a report, follow these steps:

1. From the Admin main tab, select the **Reports** page tab. The Reports page is displayed.



2. Select an offer name. The corresponding offer report page is displayed as shown in the following example:



3. Do the following:
   - Set the date range
   - Select a data grouping option either on a daily or weekly basis
4. Select **Generate**. The application displays the types of reports showing daily and cumulative formats.

Note: Select the **Notes** icon to create or view notes. For more information, refer to *Using the Notes Function* on the facing page.

5. Do any of the following:
   - Select **Download** to generate the report in CSV format.
   - From the Report column, select a graph icon corresponding with the report type. The application displays the corresponding graphic representation of the data.

Using the Notes Function

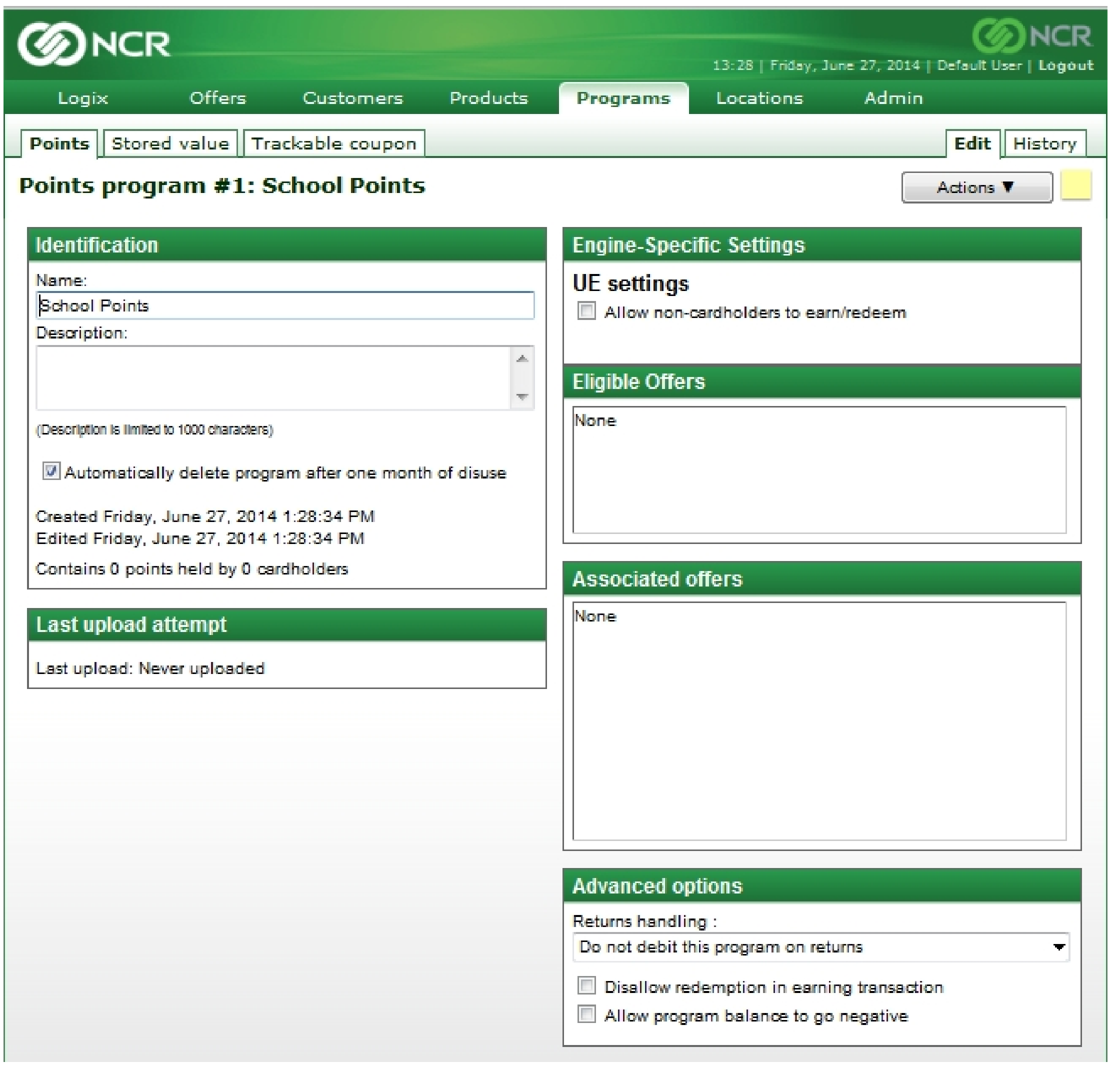
Logix allows users to create notes on certain pages using a yellow sticky–note icon on the upper–right corner of those pages. Users can use the Notes function to create private or public notes on certain pages in Logix. This section describes how to create and delete notes.

Creating Notes

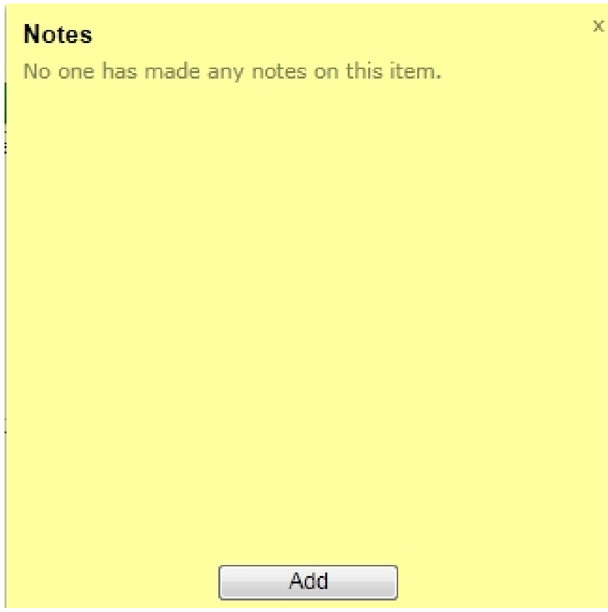
To create notes, follow these steps:

Note: Not all Logix pages have the Notes function. This procedure uses the Notes icon in a Points Program Edit page as an example.

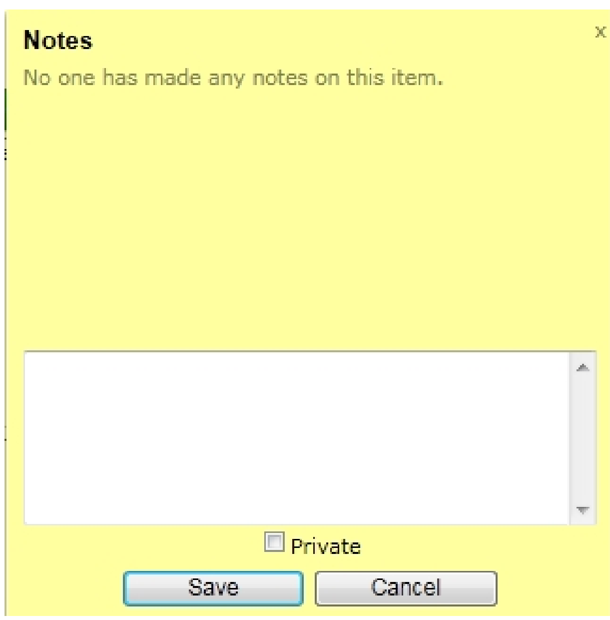
1. From the Points Program page, select a points program name. The corresponding Points Program Edit page is displayed.



2. Select the **Notes** icon on the upper–right corner of the page. The application displays the following:



3. Select **Add**. A text box is displayed.



4. Create a note entry.

Note: Selecting the **Private** check box prevents other users from reading the notes.

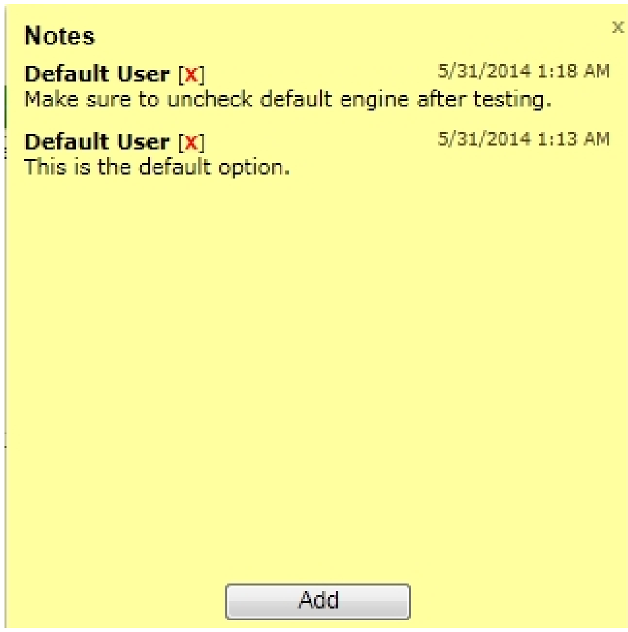
5. Select **Save**.

6. Select the **X** on the upper–right corner to close the note.

Deleting Notes

To delete notes, follow these steps:

1. Select the **Notes** icon. The application displays the following:



2. Select the red **X** on a corresponding note. The application deletes the note.
3. Select the **X** on the upper–right corner to close the note.

Chapter 11: Configuring Settings

Overview

Logix allows administrators to configure the system and set its business rules. These settings are divided into multiple pages:

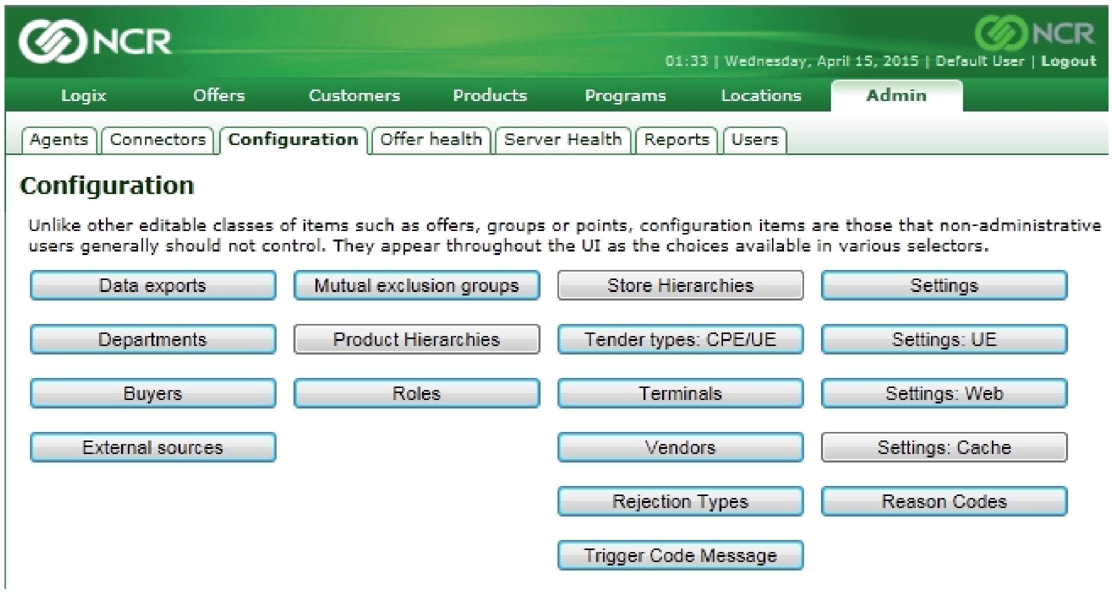
- **System Settings**—provides options that are not specific to any promotion engine.
- **Univeral Engine (UE) Settings**—provides options that only apply to, and only affect UE offers.
- **Web Settings**—provides options that apply to the customer–facing website.
- **Cache Settings**—provides options that automatically delete all or specific types of cached data.

This chapter provides instructions on how to access these settings and describes the options under each setting.

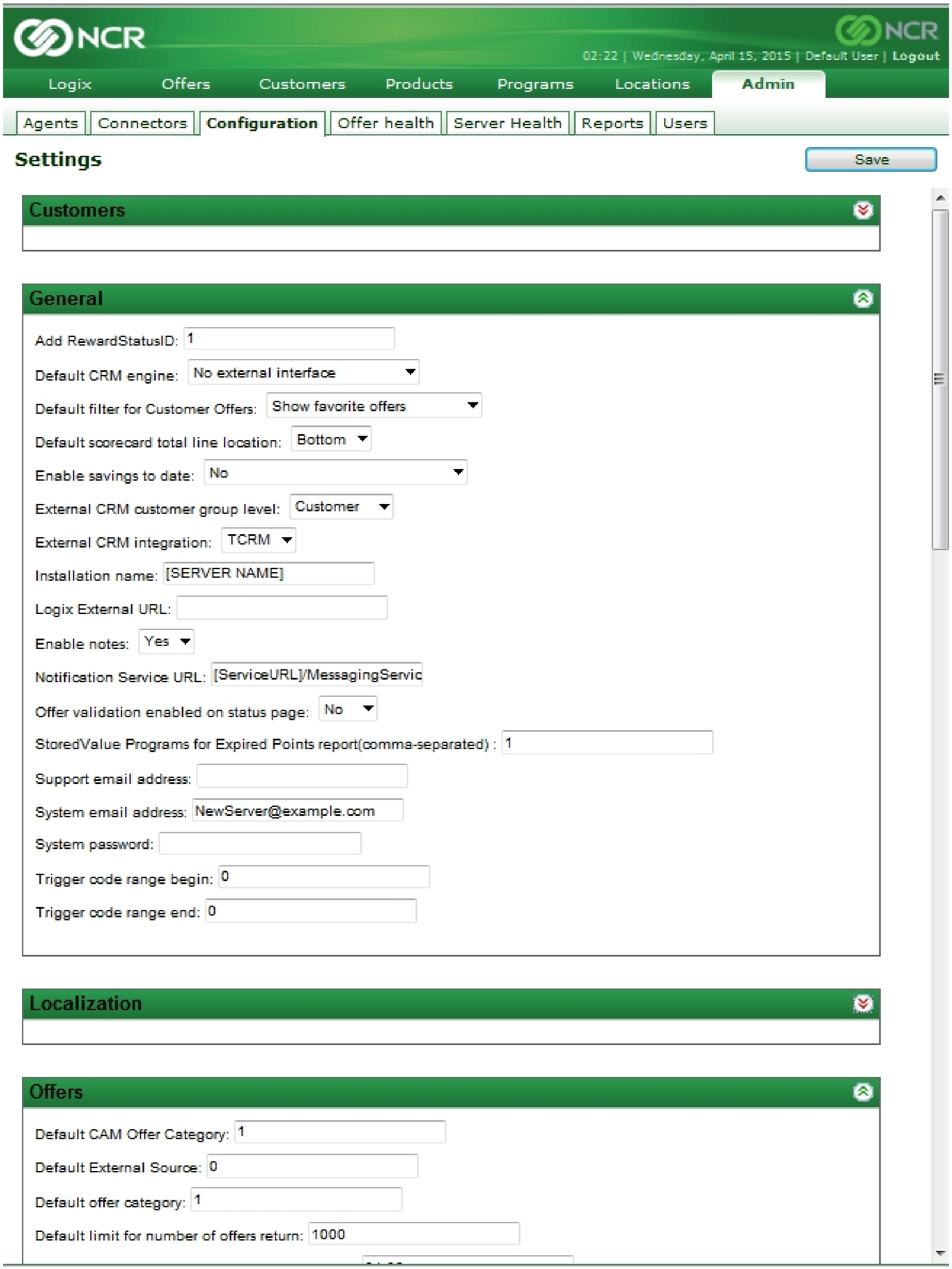
Accessing System Settings

To access and specify System Setting options, follow these steps:

1. Log on to **Logix**. The default page is displayed.
2. Select the **Admin** main tab. The Admin default page is displayed.
3. Select the **Configuration** page tab. The Configuration page is displayed.



4. Select the **Settings** button. The Settings page is displayed.



Note: Use the chevron button of a corresponding option type to either hide or expand available options settings.

5. Determine the option type to be configured.

Note: Refer to the corresponding sections in this chapter for a description of each option settings.

6. Configure the specific option setting by doing either of the following:
   - Select a value from the drop–down list.
   - Enter a value in the corresponding field.
7. Select **Save**.

Customer Options

Refer to the following table for a description of each customer option.

Customer Option	Value	Description
Allow customer record creation if not found in customer inquiry	• Yes • No	If Yes, allow users to create customer information after performing a Customer inquiry.
Customer inquiry default page	• General • Offers	Controls which page displays by default when users perform a Customer inquiry.
Customer inquiry transactions default view	• All transactions • Only with redemptions • Only without redemptions	Sets the default filter when users access the Transactions sub–page from the Customers tab.

Customer Option	Value	Description
Customer record lock timeout (minutes)	Numeric	The period after which Logix automatically unlocks the customer record. When a customer shopping at a store checks out, that customer's record in the central server is locked until the store signals that the transaction is complete. **Note:** This prevents members of a single household from simultaneously taking advantage of a single offer at different locations, which could be problematic. However, if for some reason the central server doesn't receive this signal, the customer record could be stuck in a locked state.
Customer Service URL	http://<customerbrokerIP>:8080/ams-broker-customer/customers/ where: customerbrokerIP=IP address of the Customer Broker component.	IP address of the Customer Broker component.
Default customer group ID type	• Loyalty card number • Household ID	The default identifier used to identify a customer. Uses either a loyalty card number (0) or household ID (1).
Display card count on customer group page	• Yes • No	

Customer Option	Value	Description
Enable householding	• Yes • No	Sets whether the system allows householding.
Household continuity demotion policy	• **Never demote continuity**—the demote option is disabled and all cards can only be removed from the household. • **Demote when last card removed (manual)**—when there is more than one card in the household then the demote option is disabled. The last card in the household has the option to be removed or demoted. • **Demote on any card removed (manual)**—the demote option is available for all cards in the household at all times. • **Demote on any card removed (manual)–last card (auto)**—the demote option can be used on any card that is in the household but the last card in the household must be demoted and does not have the option to be removed.	Handles what happens when a customer card is demoted from a household and when a card can be demoted from households.
Require note when adjusting balance	• **Yes**—enables the note section to the adjustment pages, but requires a note entry to apply an adjustment. • **No**—disables the notes section and prohibits adjustments.	Adds or removes the requirement of entering an explanation when making adjustments to the points or stored value balance of a customer.

General Options

To establish General Options, specify the values in the General section.

General Option	Value	Description
AddRewardStatusID		
Default CRM engine	• No external interface • CRM communications service	Sets the default CRM engine when new offers are created.
Default filter for Customer Offers	• Show all offers • Show favorite offers • Show active offers • Show offers with credit • Show active targeted offers	Sets the default value in the Customer Offers filter drop–down list.
Default scorecard total line location	• Bottom • Top	Sets the position of the total line when the scorecards are printed.
Enable 2nd factor authentication	• No • Yes	Sets whether the second factor authentication is enabled in the system. If this option is set to Yes, Logix and EPM users (if Logix and EPM are in integrated mode) must enter a One–Time Password (OTP) to successfully log on to the system.
Enable Bypass 2nd factor authentication	• No • Yes	Sets whether Logix and EPM users (if Logix and EPM are in integrated mode) can bypass the second factor authentication after successfully completing at least one logon using the second factor authentication.

General Option	Value	Description
Enable savings to date	• No • At Customer Level • At Household Level • At Customer and Household Level	Records the discounts accumulated by customers. **Note:** This setting is automatically disabled and hidden if the *Enable multi currency for UE* setting is enabled in the UE settings. Logix does not have the capability to combine savings amounts accumulated from different currencies.
External CRM customer group level	• Customer • Household	Sets the CRM customer group type.
External CRM integration	• None • TCRM • CRM	Sets the CRM engine to which the offer setup information is sent.
Installation name	Alphabetic characters	Indicates the name of the current Logix installation.
Logix External URL	URL	Indicates the IP address of the Logix server using the following format: `http://logix IP address`.
Enable notes	• Yes • No	Sets whether users can attach notes to items in Logix using the Notes function. **Note:** This option does not affect the Notes function in Customer Inquiry.
Notification Service URL	URL	Indicates the IP address of the Logix server using the following format: `http://logix IP address:8071/MessagingService/messaging/SendNotific-ations`.
Offer validation enabled on status page	• Yes • No • Link	Sets whether a summary of offer validation is displayed on the Status page. The following are the options: • Yes—displays offer validation on the Status page. • No—does not display offer validation on the Status page. • Link—displays a link to the Offer Validation page.
One Time Password (OTP) expiry duration (Min.)	Numeric	Indicates the number of minutes until the OTP expires.

General Option	Value	Description
One Time Password (OTP) retry attempts	Numeric	Indicates the number of attempts that Logix or EPM users (if Logix and EPM are in integrated mode) are permitted to enter the OTP details before it becomes invalid.
PHA HierarchyResyncQueue Threshold	Numeric	
StoredValue Programs for Expired Points report (comma-separated)	Numeric	Sets the Stored Value programs that are be added to the Expired Points report.
Support email address	Alphanumeric characters	Receives system support emails from users. **Note:** The address is displayed on the Logix login page.
System email address	Alphanumeric characters	Sends automatically—generated alert emails to users.
System password		
Trigger code range begin	Numeric	The first number in the range of trigger codes that is available for use in offer conditions.
Trigger code range end	Numeric	The last number in the range of trigger codes that is available for use in offer conditions.
User Password Expiry (Days)	Numeric	Indicates the number of days until the Logix and EPM (if Logix and EPM are in integrated mode) users' password expires. **Note:** If Logix and EPM are in integrated mode, this setting is visible only in the Logix system, but both systems share the same value. If Logix and EPM are in stand–alone mode, this setting is visible in both systems, and both systems use different values separately.

Localization Options

To establish Localization Options, specify the values in the Localization section.

Localization Option	Value	Description
Default country	Drop–down list	Indicates the ID of the country that is selected by default when creating new stores. The selected country also determines which term Logix uses for national subdivisions, for example, state, province, and so forth. **Note:** Default data for all major languages has been created.
Default Customer–facing language	Drop–down list	Indicates the language used on a customer facing website if the Enterprise Preference Manager (EPM) was not installed.
Default Logix Language	Drop–down list	Indicates the language that is assigned to a new Logix administrative user when a new account is created.
Enable multi–language use	• **Yes**—EPM is not integrated. A Logix system option is available for selecting the customer facing language at the enterprise level. • **No**—system options for Logix and EPM are available for selecting the single language that will be used.	Indicates multi–language is used on the system.

Offer Options

To establish Offer Options, specify the values in the Offer section.

Offer Option	Value	Description
Default CAM Offer Category	Numeric characters	By default, promo class of the new offers are updated with the Default CAM offer Category.
Default External Source	Numeric characters	Determined whether Trackable coupon program can be shown as the sub tab in the Logix UI.
Default offer category	Numeric characters	By default, new offers are assigned to this category. **Note:** Not currently used.
Default limit for number of offers return	Numeric characters	Used to get the default offer Limits in Universal Offer Connector.
Deferred deployment start time	Time in 24–hour format	Specifies the time that offers marked as deferred are deployed.
Enable "save and close" for offer pop–ups	• Yes • No	Determines whether pop–up windows used with offers are automatically closed after saving entries.
Offer validation time	Time in 24–hour format	Specifies the time for automatic daily validation of all offers in the system. **Note:** Individual offers can be manually validated.
Template default locking state	• Locked • Unlocked	Indicates the default state of fields in newly–created offer templates.
Use UpdateOffer and DeleteOffer attributes on Offer tag in OIA	• Yes • No	Allows attributes of the UpdateOffer and DeleteOffer methods to be used as tags in Offer XML when importing in Offer Import Agent(OIA).

Path Options

To establish Path Options, specify the values in the Paths section.

Path Option	Value	Description
Add External Offers File Path	Directory path	Specifies the path where the External offer is saved.
Agent import file path	Directory path	Specifies the directory where files associated with hierarchy agents, update agents, and the offer import agent are saved.
Graphics storage path	Directory path	Specifies the server path where images that are uploaded for graphics are stored.
Logging Path Primary	Directory path	Specifies the server path where logging information is stored. **Note:** Logs are accessible through the UI via the Log File Viewer. For more information, refer to *Log Files* on page 801.
Logging Path Secondary (local failover)	Directory path	Checks whether the primary log path is accessible and has write permission, if not load local failover path.
SMTP address	Directory path	Specifies the IP address of the Simple Mail Transfer Protocol (SMTP) server, which handles email messaging for things like alert emails.
Workspace file path	Directory path	Specifies the directory in the Web Server where files uploaded from the Logix user interface are stored. This path is used by the agent that picks up the file.

Product Options

To establish Product Options, specify the values in the Products section.

Product Option	Value	Description
ID field to show for product hierarchy	• **None**—uses no prefix • **External ID**—uses the External ID for the product hierarchy • **Display ID**—uses the Display ID set for the product hierarchy	Indicates the prefix identifier for Product Hierarchy.
Maximum number of products that can be deployed	Numeric	Sets the maximum number of products that can be deployed for an offer.
Numeric only product IDs in Product Groups	• **Yes**—only allows numeric characters for product IDs • **No**—allows alphanumeric characters for product IDs	Specifies allowed characters used for product IDs in product groups.
Use agent for product hierarchy linking	• Yes • No	If enabled, the Add Linked node for agent is added.
Use legacy CPE message during product hierarchy linking		

Program Options

To establish Program Options, specify the values in the Programs section.

Program Option	Value	Description
Allow negative stored value adjustments	• Yes • No	Allows the adjustments of stored value balances to be set to negative so that the balances can be reduced.
External Points Programs enabled	• None • EME integration • CRM connector integration	Allows points programs to be created as external programs and be given external IDs. If this is not enabled, these options are not available for points programs.
POS Points Program Manual Adjustments	• Enabled • Disabled	If enabled, points programs can use the manual adjustment UPC functionality. If disabled, the UPC functionality is not available under the points programs.
POS Stored Value Manual Adjustments	• Enabled • Disabled	If enabled, stored value programs can use the manual adjustment UPC functionality. If disabled, the UPC functionality is not available under the stored value programs.
Stored value redemption priority	• Redeem value that will expire sooner first • Redeem value that will expire later first	Specifies which records are redeemed first.

Purging Options

To establish Purging Options, specify the values in the Purging section.

Purging Option	Value	Description
Auto delete history data after (days)	Numeric	Logix deletes history data that are older than the specified number of days.
Auto delete offers after expired for (days)	Numeric	Logix deletes expired offers that are older than the specified number of days.
Auto purge customer home–stores after (days)	Numeric	Logix automatically deletes information associating a customer to a home store after the specified number of days.

Security Options

To establish Security Options, specify the values in the Security section.

Security Option	Value	Description
LDAP Authentication Enabled	• **Yes**—Logix leverages an external LDAP server for all user authentications except the "admin" account. • **No**—authentication is accomplished with the standard username and password fields in Logix • **Sun ONE**	Indicates the authentication type required by the external LDAP server.
LDAP Authentication Type	• **None**—normal, original–style LDAP connection. • **Secure**—the WinNT provider uses NTLM to authenticate the client. • **SecureSocketsLayer**—attaches a cryptographic signature to the message that both identifies the sender and ensures that the message has not been modified in transit. Active Directory Domain Services requires installation of the Certificate Server to support SSL encryption. • **Kerberos**—active Directory Domain Services uses Kerberos, and possibly NTLM, to authenticate the client.	Indicates the authentication type required by the external LDAP server.
LDAP Connection String	Alphanumeric	Specifies the URI of the server connection, which may need to include the base dn string and an optional port. **Example:** `ldaps://ldap.copienttech.com:5555`

Security Option	Value	Description
LDAP Expired password redirect URL	Alphanumeric	When using the external login, this is the URL where the user is redirected when the authentication password has expired and must be renewed.
LDAP User Search String	Alphanumeric	Specifies the search string used to lookup a user account on the directory server. This string must contain the token “LogixUserName,” which is replaced by the username of the user logging in. **Example:** `uid=LogixUserName,ou=people,ou=associates,dc=Copient,dc=com`

Store Options

To establish Store Options, specify the values in the Store section.

Store Option	Value	Description
ID field to show for store hierarchy	• **No**—uses no prefix • **External ID**—uses the External ID for the store hierarchy • **Display ID**—uses the Display ID set for the store hierarchy	Indicates the prefix identifier for Store Hierarchy.
Store health maximum offline (minutes)	Numeric	Specifies the maximum period in minutes that a store can be offline before generating warnings.
Watchdog store alert frequency (minutes)	Numeric	Specifies the period in minutes that an agent must be offline before it is noted by Watch Dog.

Folder Options

To establish Folder Options, specify the values in the Folders section.

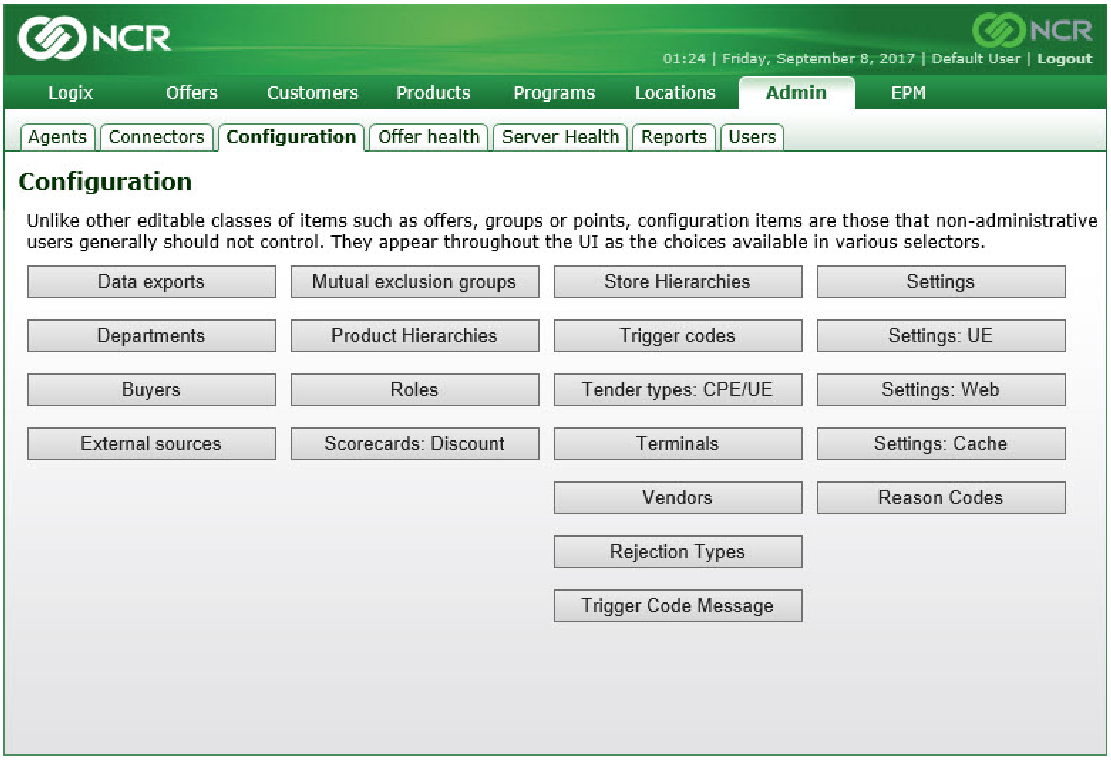
Folder Option	Value	Description
Allow a folder not to be deleted if at least one offer associated	• Yes • No	If Yes is selected, the folder associated with an offer cannot be deleted.
Enable folder creation with themes	• Yes • No	If Yes is selected, a pop–up window with theme options is displayed when creating folders.
Mass Action - Maximum limit for offers to be assigned to a folder	Numeric	Determines the maximum number of offers that can be assigned to a folder. Selecting more than the specified limit of offers displays an error message. **Example:** The value is set at 2, but 3 offers were selected to be assigned to a folder. An error message is displayed stating: "You are going to assign 3 Offers. This has reached the maximum Offer Limit of 2. Action cannot be performed." For more information, refer to *Applying Folder Dates to Offers* on page 83.
Mass Action - Maximum limit for offers to duplicate to a folder	Numeric	Determines the maximum number of that can be duplicated to a folder. Selecting more than the specified limit of offers to be duplicated displays an error message. **Example:** The value is set at 2, but 3 offers were selected to be duplicated to a folder. An error message is displayed stating: "You are going to duplicate 3 Offers.This has reached the maximum Offer Limit of 2.Action can not be performed." For more information, refer to *Copying and Transferring Offers to Folders* on page 85.
Mass update of offers while changing the folder dates	• Yes • No	If Yes is selected, updates made to folder dates are also applied to the offers inside the folder.
Must select a folder with future end date	• Yes • No	If Yes is selected, an error message is displayed when an offer is associated with a folder that has earlier dates.

Folder Option	Value	Description
Offer dates must fall in the range of folder dates	• Yes • No	If Yes is selected, the dates of offers associated with the folder change to the folder Start– and End– dates. For more information, refer to *Applying Folder Dates to Offers* on page 83.
Offers must be associated with at least one folder	• Enabled • Disabled	If Yes is selected, an offer must be associated with a folder in order to successful create the offer. For more information, refer to *Creating New Offers* on page 154.
Restrict offers to be associated with only a single folder	• Enabled • Disabled	If Disabled, the option indicates that any number of folder can be associated with the offer.

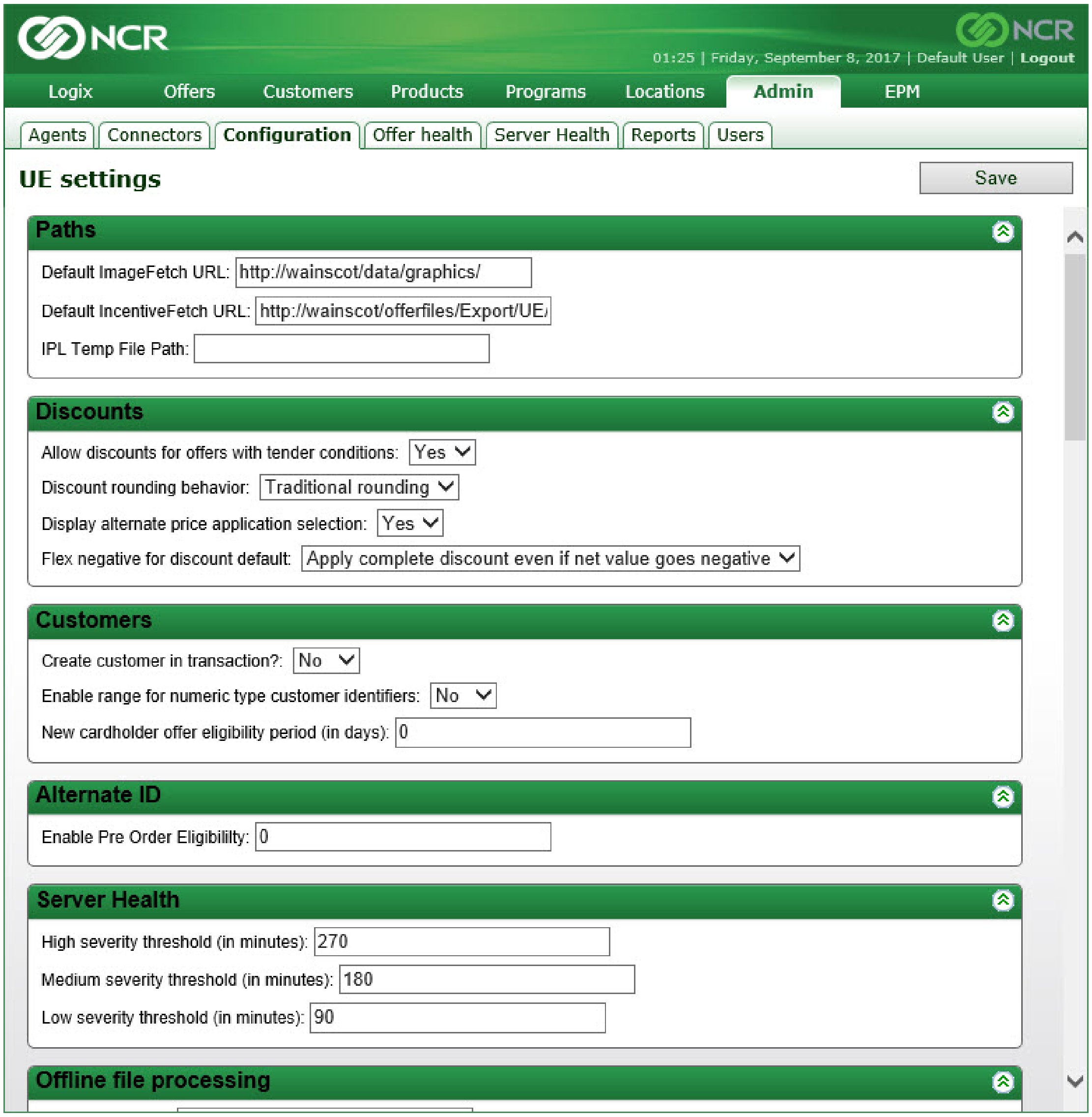
Accessing UE Settings

To access and specify the UE settings, follow these steps:

1. Log on to **Logix**. The default page is displayed.
2. Select the **Admin** main tab. The Admin default page is displayed.
3. Select the **Configuration** page tab. The Configuration page is displayed.



4. Select the **Settings: UE** button. The UE Settings page is displayed.



Note: Use the chevron button of a corresponding option type to either hide or expand available options settings.

5. Determine the option to be configured.

Note: Refer to the corresponding sections in this chapter for a description of each option settings.

6. Configure the specific option setting by doing either of the following:
   - Select a value from the drop–down list.
   - Enter a value in the corresponding field.
7. Select **Save**.

Path Options

Path Option	Value	Description
Default ImageFetch URL	URL	Specifies the standard URL used by ImageFetch.
Default IncentiveFetch URL	URL	Specifies the standard URL used by IncentiveFetch.
IPL Temp File Path	File directory	Specifies the file path where IPL temporary files are written before they are sent to the store.

Discount Options

Discount Option	Value	Description
Allow discounts for offers with tender conditions	• Yes • No	Specifies whether discounts are allowed on offers that have tender conditions.
Discount rounding behavior	• Truncate • Traditional rounding • Round up	Specifies how discounts are rounded.
Display alternate price application selection	• Yes • No	If Yes is selected, "Alternate Price" is a discounting option.
Flex negative for discount default	• Do not apply discount if exceeds net value • Apply discount upto net value • Apply complete discount even if net value goes negative	Allows to choose the default value for the Flex Negative option while creating an offer.

Customers Options

Customer Option	Value	Description
Create customer in transaction?	• Yes • No	Enables the automatic creation of a customer record during a transaction if set to Yes. For more information, refer to *Creating Customer Records in Transactions* on page 409.

Customer Option	Value	Description
Enable range for numeric type customer identifiers	• Yes • No	If Yes is selected, the retailer can set the range limit of the numeric type customer IDs for each card type. If the range is set, a customer record is created during a transaction only if the customer ID falls within that range.
New cardholder offer eligibility period (in days)	Numeric	Configures the period during which new cardholders are eligible to avail of offers that have New Cardholder condition.

Alternate ID Option

Alternate ID Option	Value	Description
Enable Pre Order Eligibility	Numeric	Indicates, at offer level, that an offer is available on items that have no stocks (back ordered).

Server Health Options

Server Health Option	Value	Description
High severity threshold (minutes)	Time in minutes	The time after which a server error is considered high priority.
Medium severity threshold (minutes)	Time in minutes	The time after which a server error is considered medium priority. **Note:** The server error is considered low priority if it has not entered the medium severity threshold.
Server Health Service URL	`http://HSIPaddress:8080/ams-health/health` where: HS = Health Service	IP address of the Health Service component.

Offline File Processing Option

Offline File Processing Option	Value	Description
Return Item Group	Numeric	

Trigger Code Options

Trigger Code Option	Value	Description
Trigger codes permitted in multiple offers	• Yes • No	Allows trigger codes to be used in more than one offer condition at the time. If No is selected, trigger codes are only used in one offer condition.
Trigger codes permitted outside of designated range	• Yes • No	Allows trigger codes to be used in offers that are outside of the range specified in other options. If No is selected, trigger codes used with offers should be within the specified range.

Miscellaneous Options

Miscellaneous Option	Value	Description
Allow return discounting	• Yes • No	Uses the program ID when determining the Points balance for a member's card in the base program. **Note:** This option is used by the CardAuthorization connector.
Default lane type	Numeric	Indicates the default checkout lane type.
Default operator display type	Numeric	Specifies whether cashier displays are on or off by default: • 0—none • 1—2x20 pole display
Default printer type	Numeric	Specifies the default printer type depending on the promotion engine.
Defer basket level offers evaluation to Total	• Yes • No	If Yes is selected, the promotion engine holds off evaluation on all basket level discounts until the Total key is selected. Logix sends this information to promotion engines through IPL/Incentive Fetch. **Note:** By default, this option is set to No.

Miscellaneous Option	Value	Description
Display Redemption Quantity of Offer	• Yes • No	If Yes is selected, the number of times that an offer is redeemed in a transaction is captured during end of sale (EOS) and can be viewed in the transaction logs. This setting is applicable to all types of rewards and offers. **Example:** A retailer provides a "Buy 2 shirts and get $2 off" offer, with an item–level discount type and an item limit of 1. In a transaction, the customer purchases 6 shirts. The resulting redemption quantity is 3.
Enable Customer Locking	• Yes • No	If Yes is selected, retailers lock a customer's account to avoid double–dipping with points, stored value, and promotions with usage limitations.
Enable Issuance	• Yes • No	If Yes is selected, the issuance option is available on the advanced options of offers.
GetCustomerInfo IP address	IP address	Indicates the address used to execute a GetCustomerInfo call against Logix if the retailer has set up a dedicated server to handle only calls to GetCustomerInfo.
Impression reporting default	• Enabled • Disabled	Determines whether offers should send impression reporting by default. If disabled, the impression reporting for a new offer must be manually set.
IPL – Concurrent window (minutes)	Time in minutes	Specifies the period (in minutes) during which multiple IPLs are considered to be concurrent.
IPL – Max concurrent	Numeric	Specifies the allowed number of maximum simultaneous IPLs.
IPL – Max records per batch	Numeric	Specifies the maximum number of records that are written into an IPL file.

Miscellaneous Option	Value	Description
Item Level Adjustment Application	• Never apply to future items; Never redistribute • Apply to future items; Redistribute to applicable items	Specifies how an adjustment is applied if an Item Level Adjustment is sent in a transaction: • Never apply to future items—indicates that the adjustment is only applicable to one item even if the cashier changes the quantity of an item. • Apply to future items—indicates that the adjustment is continuously applied to future items when the quantity has changed.
Number of cashier message lines (10 max)	Numeric	Permits users to add more fields in cashier message rewards that are displayed on the receipt. By default, Logix displays two fields.
Offer validation grace period (hours)	Time in hours	Specifies the number of hours during which an offer or group that has reached a store does not produce a warning. **Note:** A warning is only produced when the time difference between the store's local server and the central server exceeds this grace period value.
Zero balance messages default	• Do not print • Print	Specifies whether messages that communicate a balance are printed if the balance is zero. **Example:** A balance of points.
Promotion Broker IP address along with port number (xxx.xxx.xxx.xxx:xxxx)	IP address	Enables the Logix and the Promotion Broker to communicate in order to display the number of winners and the potential awards remaining on the Instant Win Condition page.
Enable Reward Point Limits	Numeric	Determines the limit for points rewards.
Enable Issuance For Any Customer Transactions	• Yes • No	If Yes is selected, the Any Customer transaction rewards (issuance rewards) is recorded in the LogixEX Issuance Database.
Operate At Enterprise?	• Yes • No	If Yes is selected, the local server is configured to communicate with central servers; and indicates the number of store locations handled by individual local servers. It also displays the Use Server Health Service option.

Miscellaneous Option	Value	Description
Use Server Health Service	• Yes • No	If Yes is selected, Logix retrieves the Server Health details using server health service. It also displays the Server Health Service URL option in the Server Health section. For more information, refer to Server Health Options on page 733.

Localization Options

Localization Option	Value	Description
Enable multi unit of measure for UE	• Yes • No	Indicates whether multiple unit of measurements can be configured and used within an offer and location.
Enable multi currency for UE	• Yes • No	Indicates whether multiple currency can be configured and used within an offer and location.
Default currency type	Drop–down list	Specifies the default currency.
Enable legacy offer text	• Yes • No	Specifies the base translation that is used with offers in multiple language situations.

Trackable Coupon Options

Trackable Coupon Option	Value	Description
Enable Trackable Coupons	• Yes • No	If enabled, users can create trackable coupon programs and attach them to offers. Otherwise, the trackable coupon program functionality is not available under programs.
Trackable Coupon Cache Refresh Interval (hours)	Time in hours	Specifies the amount of time a trackable coupon is cached since the last inquiry or use.
Trackable coupon lock timeout (seconds)	Time in seconds	Amount of time a trackable coupon is locked once it is scanned. While a coupon is locked, it cannot be scanned again and must either be redeemed or unlocked by an outside source. This setting allows a coupon to be automatically unlocked after a set time period allowing for another scan without an explicit unlock.

Trackable Coupon Option	Value	Description
Trackable coupon prefix	Alphanumeric characters	Specifies the prefixes for trackable coupons. These prefixes are used to differentiate the trackable coupons from the trigger codes. This option may contain multiple prefixes (separated by commas). If the prefix is defined in this option, the system considers the coupon code in a transaction as a trackable coupon if it matches the prefix; otherwise, the system considers it as a trigger code. **Note:** If there is no prefix set in this option, the system considers the coupon code as a trackable coupon only if its length is not equal to 16 characters. If the coupon code has 16 characters, it is considered as a trigger code.
Display coupon count on Trackable coupon program	• Yes • No	Enables a display of count of associated coupons in a trackable coupon program.

Product Options

Product Option	Value	Description
Allow Node Deletion even if it is associated with product groups	• Yes • No	If **Yes** is selected, users can delete a hierarchy node while it is being used in an Attribute–based product group. The default value is No.
Default Product Group Type	• Standard product group • Attribute based product group	Specifies the default product group type when creating a product group.

Messaging Options

Messaging Option	Value	Description
Messaging Server Host	localhost	Displays the host address of the RabbitMQ Server.
Messaging Server Port	Numeric	Displays the port number needed to connect to the RabbitMQ Server. The default is port number is 5672.
Messaging Username	Alphanumeric	Dispalys the RabbitMQ server username. The default username is guest.
Messaging Password	Alphanumeric	Displays the RabbitMQ server password. The default password is guest.

Buyer Options

Buyer Option	Value	Description
Display buyer ID with offer and product group names	• Yes • No	When **Yes** is selected, the Buyer ID is prefixed to the offer and product group names. Otherwise, only the offer and product group names are displayed.
Enable Buyer ID column on the offer list page and template list page	• Yes • No	When **Yes** is selected, the Buyer ID column is displayed in the Offers page and Templates page. Otherwise, the Buyer ID column is hidden.
Enable Buyer ID column on the Product Group list page	• Yes • No	When **Yes** is selected, the Buyer ID column is displayed in the Product Group page. Otherwise, the Buyer ID column is hidden.

Collision Detection Options

Collision Detection Option	Value	Description
Enable offer level collision detection by default	• Yes • No	If Yes, the collision detection option is enabled on all offers created in, or imported to Logix. For more information, refer to *Collision Reports* on page 113. **Note:** The default option is No.
Offer Collision Detection Service URL	URL	Uses the following format to enable the Collision Reports page: `http://<LogixServerIP/Name>:8071/OCD`. **Note:** Any available port can be used. The default port is 8071.
Enable Automatic Collision on Product Group Changes	• Yes • No	If Yes is selected, the collision detection process is executed any time a product group used in a UE discount (included or excluded) is updated and automatically deployed (hierarchy changes, product group attribute changes, manual changes).
Enable Automatic Collision Detection on Location Group Changes	• Yes • No	If Yes is selected, the collision detection process occurs any time a location group is changed where it is used in a deployed UE offer containing a discount reward with a discounted product group.

Coupon Service Option

Coupon Service Option	Value	Description
Coupon Service URL	URL	Refers to the URL of the coupon service.

Analytics Option

Analytics Option	Value	Description
Enable Analytics	• Yes • No	If **Yes** is selected, the Analytics application is enabled and can be used with AMS.

UPC5 Coupon Option

UPC5 Coupon Option	Value	Description
Select UPC5 Coupon Priority	Numeric values (in a drop–down list)	Specifies the priority level of the UPC5 coupon if a scanned item qualifies for both the coupon and a Logix promotion. **Note:** The lower the value, the higher the priority.

Coupon Options

These UE settings are applicable only to the paper type coupons: UPC5 and GS1 DataBar.

Coupon Options	Value	Description
Coupon Reward Evaluation	• HIGO—highest–priced item is rewarded. • LOGO—lowest–priced item is rewarded.	Specifies how to handle the coupon reward if two or more items in the transaction are eligible for the coupon reward.
Defer Paper Coupon evaluation until Total	• Yes • No	If Yes is selected, the paper coupon is evaluated only after the total amount of the transaction is determined. Otherwise, the coupon is evaluated right after scanning it in the transaction.
Flex Negative options for Paper Coupon	• Do not apply discount if exceeds net value • Apply discount upto net value • Apply complete discount even if net value goes negative	Allows automatic adjustment of discounts to prevent or approve a negative discount.

Coupon Options	Value	Description
Unused Coupon	• Do not remove unused coupon from the transaction—the coupon remains queued in the transaction until the offer conditions are met. • Remove unused coupon immediately—the coupon is removed from the transaction if the offer conditions are not yet met the moment the coupon is scanned. • Remove unused coupon at Total and End Transaction processing—The coupon remains queued in the transaction until the offer conditions are met. If still unused at Total or End Transaction processing, the coupon is removed. • Remove unused coupon at End Transaction processing—The coupon remains queued in the transaction until the offer conditions are met. If still unused at End Transaction processing, the coupon is removed.	Specifies how to handle unused coupons in a transaction.

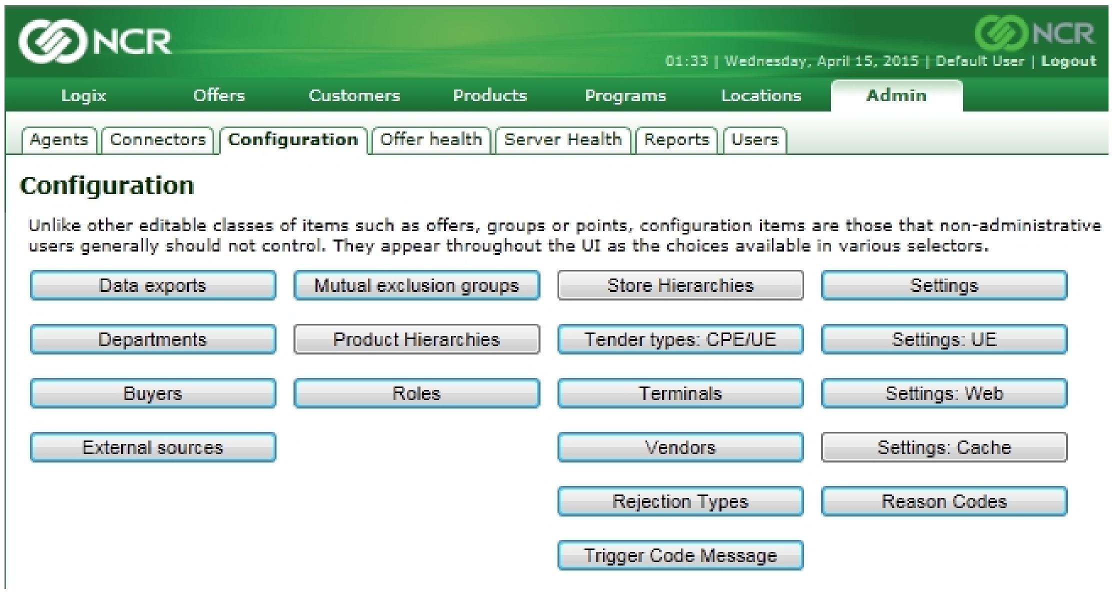
GS1 Coupon Option

GS1 Coupon Option	Value	Description
Manufacturer GS1 Coupon applied as	• Tender • Discount	Specifies how the manufacturer GS1 coupon is applied in the transaction.
Select Manufacture GS1 Coupon Priority	Numeric values (in a drop–down list)	Specifies the priority level of the manufacturer GS1 DataBar coupon if a scanned item qualifies for both the coupon and a Logix promotion. **Note:** The lower the value, the higher the priority. Also, for the store GS1 DataBar coupons, the priority is set by retailers and sent through the POS in TCP/IP.
Store GS1 Coupon applied as	• Tender • Discount	Specifies how the store GS1 coupon is applied in the transaction.

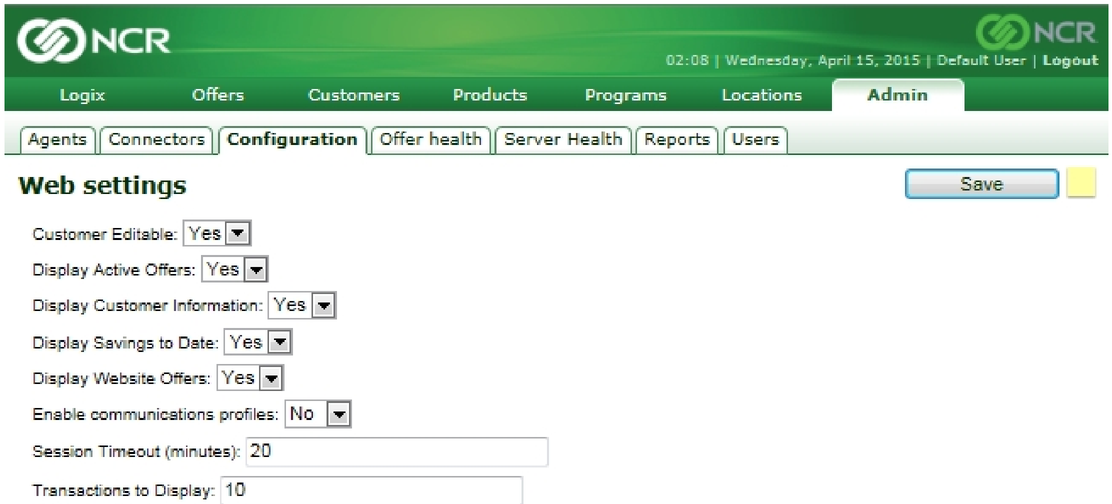
Accessing Web Settings

To access Web Settings options, follow these steps:

1. Log on to Logix. The default page is displayed.
2. Select the **Admin** main tab. The Admin default page is displayed.
3. Select the **Configuration** page tab. The Configuration page is displayed.



4. Select the **Settings: Web** button. The application displays the Web settings page.



5. Configure an option by doing either of the following:
   - Select a value from the drop–down list.
   - Enter a value in the corresponding field.

   For more information, refer to *Web Setting Options* on the next page.

6. Select **Save**.

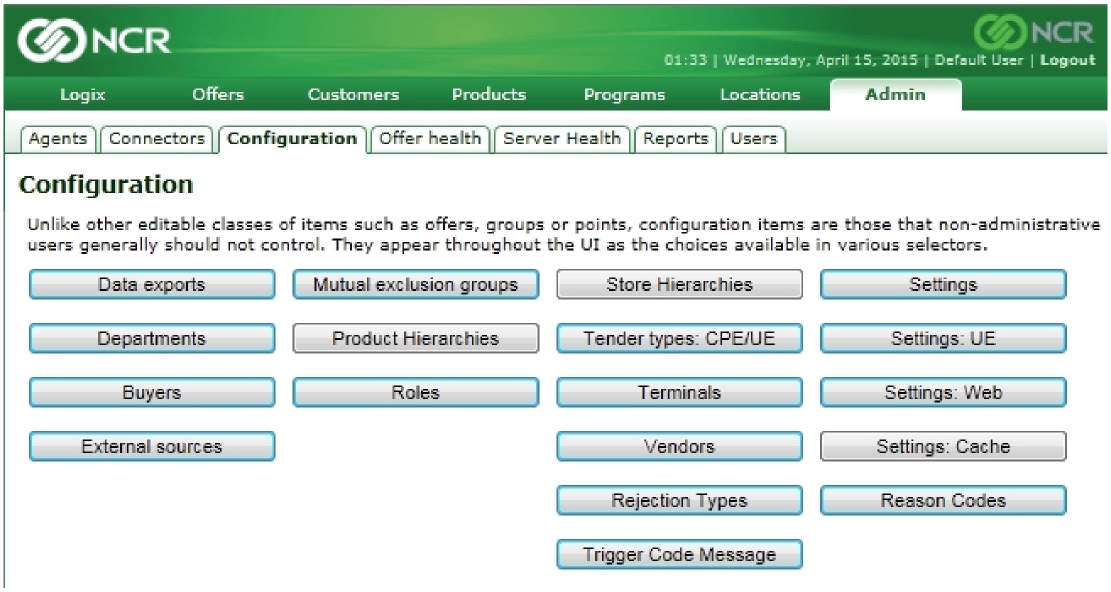
Web Setting Options

Option Name	Value	Description
Customer Editable	• Yes • No	If Yes is selected, customers are allowed to edit their own account information.
Display Active Offers	• Yes • No	If Yes is selected, currently active offers are displayed in the offers list on the Web site.
Display Customer Information	• Yes • No	If Yes is selected, account information of customers are displayed on the Web site.
Display Savings to Date	• Yes • No	If Yes is selected, the customer's savings to date total is displayed.
Display Website Offers	• Yes • No	If Yes is selected, offers are displayed on the Web site.
Enable communications profiles	• Yes • No	If Yes is selected, customers can control how frequently and through which channels they can receive communication from the retailer.
Session Timeout (minutes)	Time in minutes	Specifies the timeout duration in minutes for a customer's session, after which the customer is automatically logged out.
Transactions to Display	Numeric	Specifies the number of a customer's recent transactions that are displayed on the Web site.

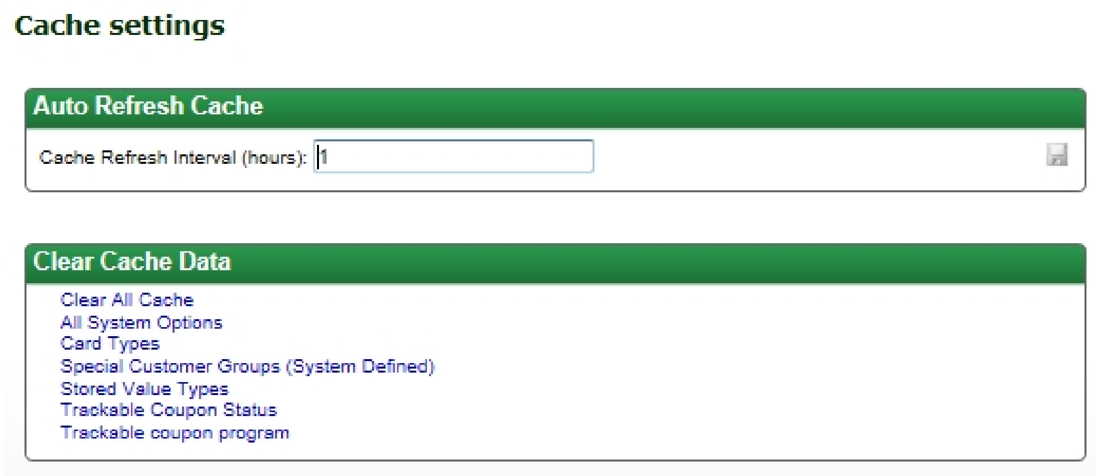
Accessing Cache Settings

To access Cache Setting options, follow these steps:

1. Log on to Logix. The default page is displayed.
2. Select the **Admin** main tab. The Admin default page is displayed.
3. Select the **Configuration** page tab. The Configuration page is displayed.



4. Select the **Settings: Cache** button. The Cache Settings window is displayed.



The Cache Settings window displays the following sections:

- **Auto Refresh Cache**—permits users to change the number of hour intervals during which the cache is automatically refreshed.
- **Clear Cache Data**—permits users to clear the cache of certain types of data.

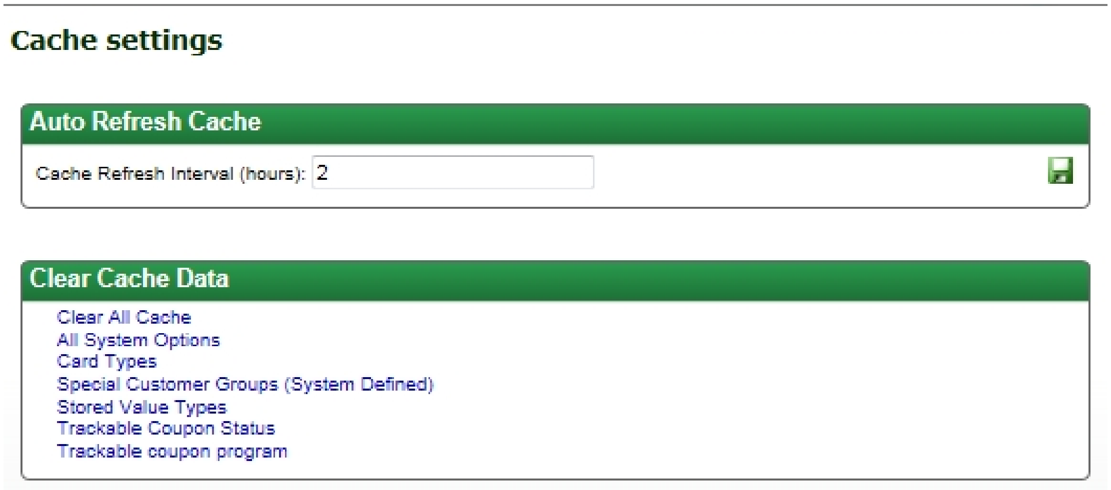
5. Do any of the following:

- Change the cache refresh hour–intervals. For more information, refer to *Updating Cache Refresh Intervals* on the facing page.
- Clear the cache of specific data types. For more information, refer to *Clearing Cache Data* on page 748.

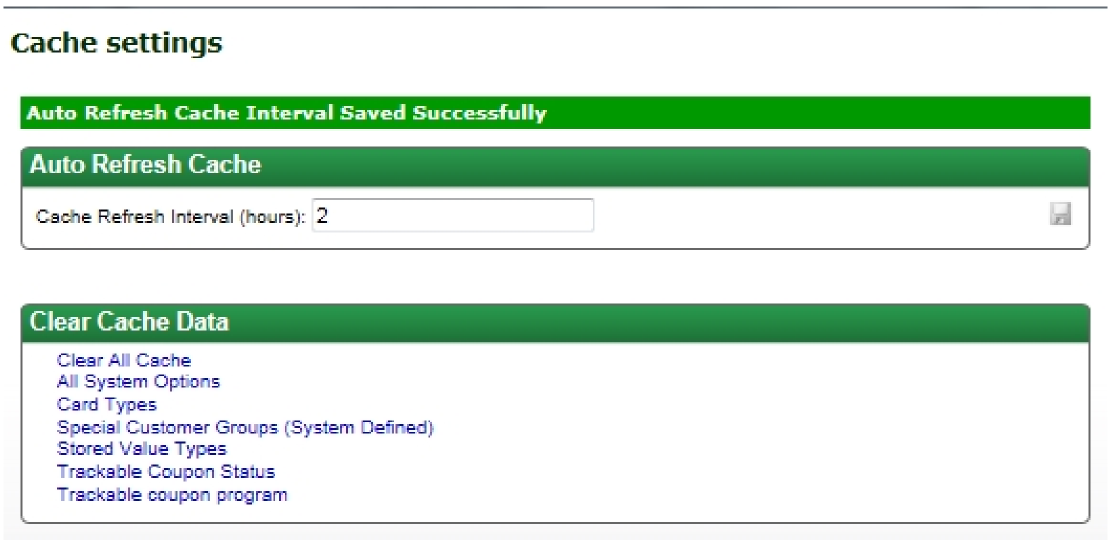
Updating Cache Refresh Intervals

To change the number of hour intervals during which the cache is automatically refreshed, follow these steps:

1. From the Cache Settings window, enter the refresh value in the Cache Refresh Interval (hours) field. The Save icon is enabled.

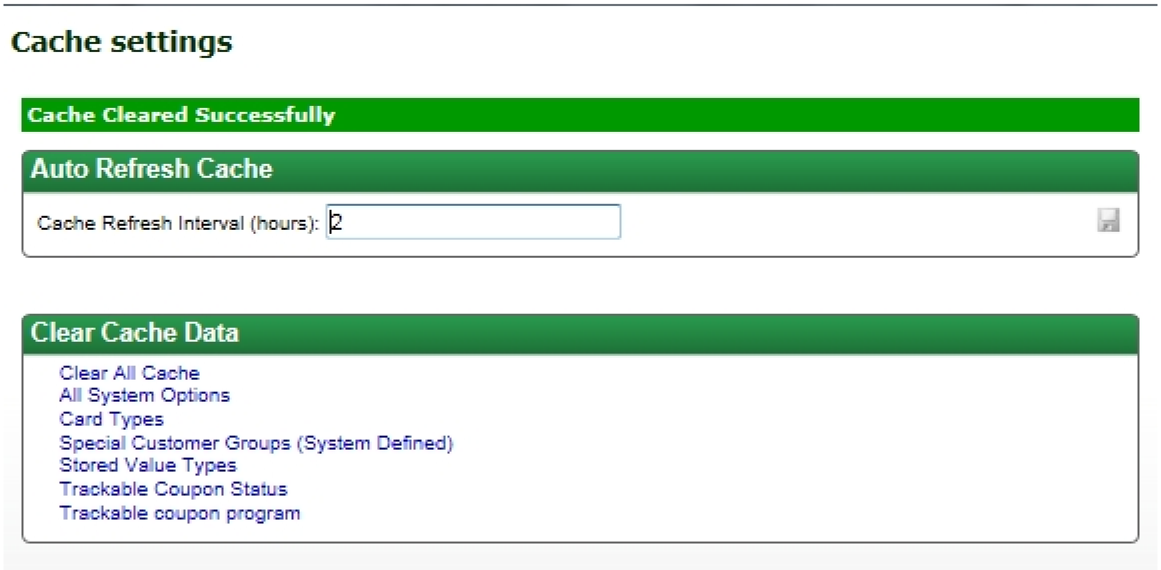


2. Select **Save**. The following window is displayed.



Clearing Cache Data

From the Cache settings window, select the data type in the Clear Cache Data section. The following window is displayed:



Refer to the following table for a description of each data type:

Data Type	Description
Clear All Cache	Clears the cache for all options.
All System Options	Clears the cache for all system options.
Card Types	Clears the cache for all card types.
Special Customer Groups (System Defined)	Clears the cache for Special Customer Groups.
Stored Value Types	Clears the cache for Stored Value Types.
Trackable Coupon Status	Clears the cache for Trackable Coupon Status.
Trackable coupon program	Clears the cache for Trackable Coupon Programs.

Chapter 12: Using Coupons

Overview

AMS supports the following coupon types:

- **Digital coupons**—store and manufacturer electronic coupons that are offered in online stores.
- **UPC5 coupons**—manufacturer paper coupons that provide discounts to certain items in transactions based on the defined value code.
- **GS1 DataBar coupons**—store and manufacturer paper coupons that function the same way as the UPC5 coupons, but with additional features, such as adding up to three purchase requirements, family codes, and company prefixes as conditions of the coupon offer.

Note: Paper coupons cannot be created through Logix.

Using Digital Coupons

Digital coupons are electronic coupons that are offered by an online store to current or prospective customers. These coupons are similar to paper coupons, but without the paper. Retailers can create offers in Logix that function as digital coupons.

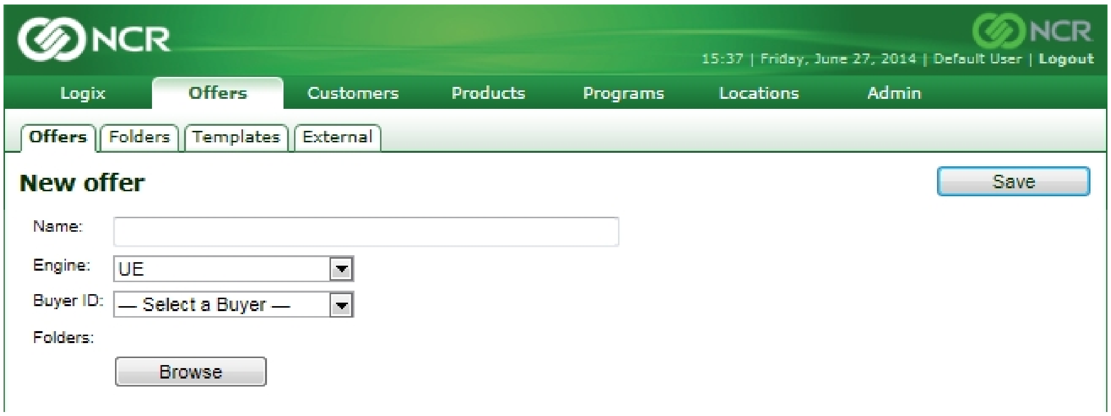
Using digital coupons follows this process:

1. The manufacturer or retailer first creates a new coupon for distribution by a third–party coupon originator. Digital coupons may be distributed by a third–party digital coupon publisher, which presents digital coupon offers on behalf of manufacturers and administers redemption programs for retailers.
2. NCR digital coupon services receive these coupons from the third–party coupon originator and use the External Offer Connector (EOC) to create a blank AMS offer with an empty customer group.
3. When a customer logs on to the retailer's e–commerce site and chooses to receive the coupon, the customer is added to the customer group and the offer is loaded to the customer’s loyalty card.
4. At the retail store, if the customer presents the loyalty card in a transaction and the transaction satisfies the offer conditions, the coupon is redeemed and the discount amount is rewarded to the customer.

Creating Digital Coupons

Creating a digital coupon is similar to creating a standard offer in Logix, but with additional settings. To create digital coupons in Logix, follow these steps:

1. From the Offers page, select **New**. The following page is displayed.



Note: If the Buyer ID field is not available, create a Buyer. For more information, refer to *Creating Buyers* on page 622.

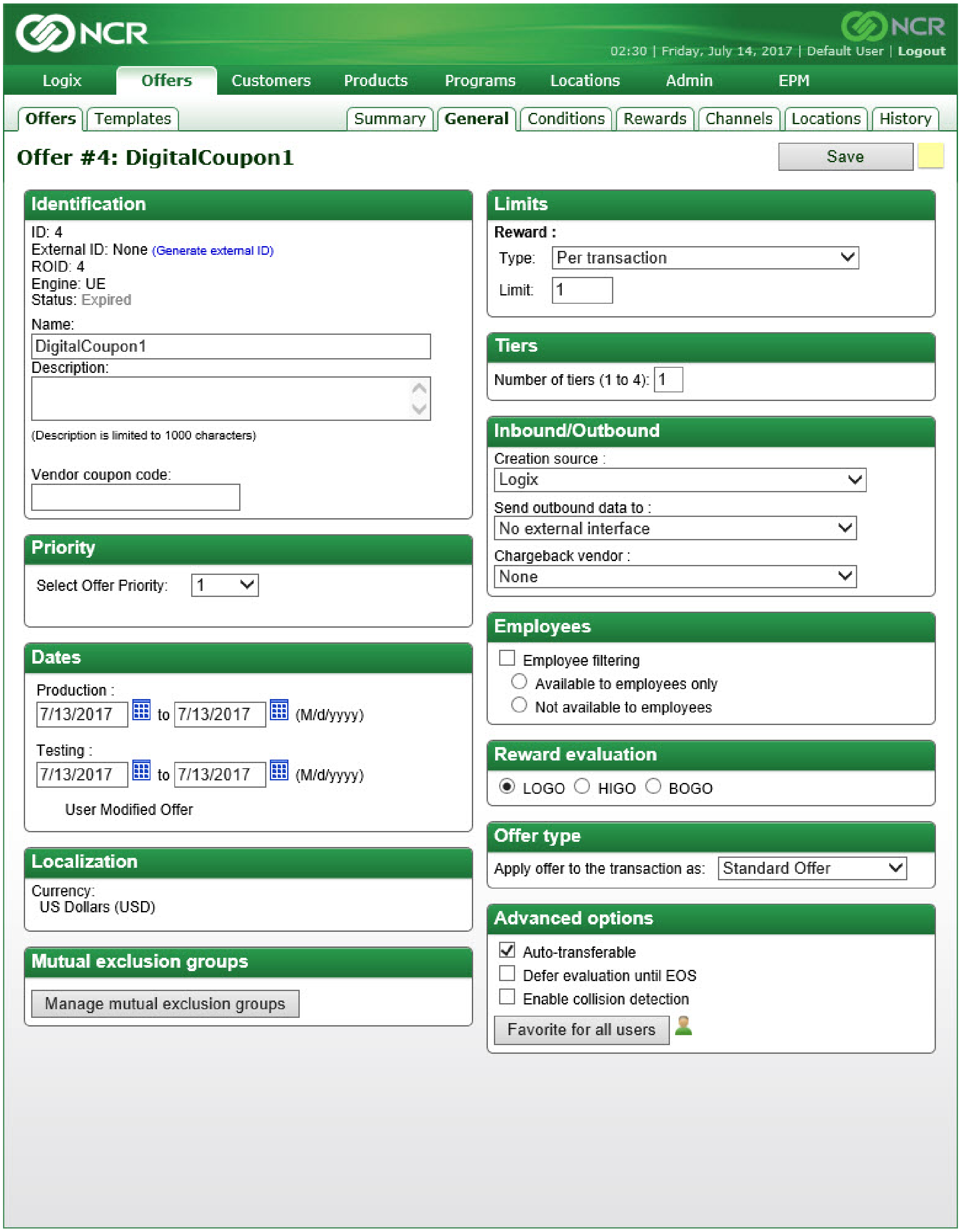
2. Enter the details in the following fields:
   - **Name**—name of the offer.
   - **Engine**—the promotion engine.
   - **Buyer ID**—the buyer role with which the offer is associated.

   Note: Associating users with buyers is optional. If the user is associated with a buyer role, which has a specified default folder, that folder will be pre–selected. The buyer role default folder takes precedence over the engine default folder.

   - **Folders**—the folder in which the offer is saved.

   Note: Defining a folder for offers is optional.

3. Select **Save**. The application displays the Offer Configuration sub–page.

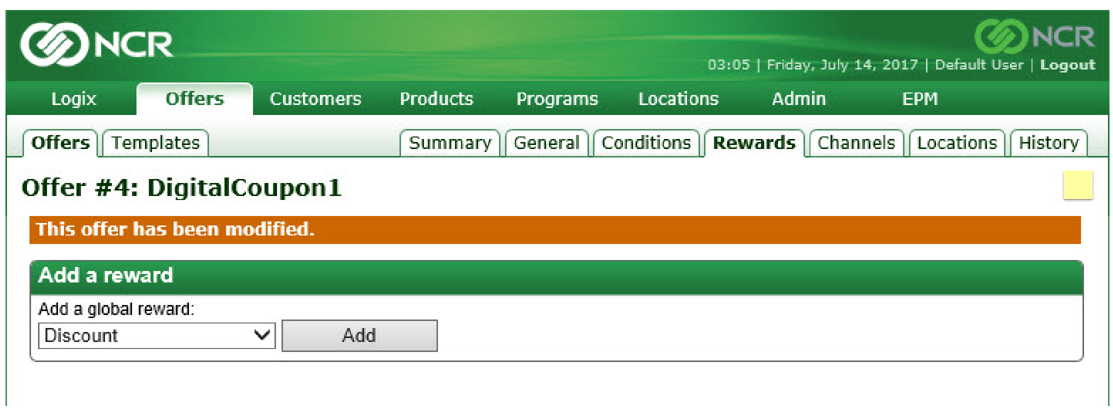


4. Define the characteristics of the new offer, such as the offer priority, dates, limits, and so forth.

5. In the Offer type section, select one of the following options:
   - Manufacturer Coupon—creates a digital manufacturer coupon.
   - Store Coupon—creates a digital store coupon.

Note: The default value of this option is Standard Offer, which when selected, creates a standard Logix offer. For more information about creating standard Logix offers, refer to *Offers* on page 154.

6. Select **Save**.
7. Select the **Conditions** tab and then create the conditions that are applicable to this offer. For more information, refer to *Offer Conditions* on page 193.
8. Select the **Rewards** tab.



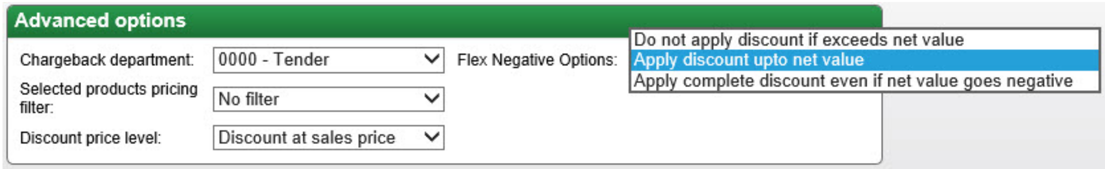
9. Add a **Discount Reward**. For more information, refer to *Discount Reward* on page 263.

Note: NCR recommends to use only the Discount Reward and not to add any other reward for digital coupons. Also, in creating the Discount Reward for digital coupons, the reward **cannot** be set to the following two specifications:

- Discount type: **Basket level**
- Distribution type: **Percentage Off**

These settings cannot be used because the total basket amount can lead to a higher discount than the item on which the manufacturer is giving the discount. Because of this, the manufacturer may have to pay for other items that do not belong to him.

10. In the *Advanced options* section of the discount reward window, the Flex Negative Options drop–down list is displayed.



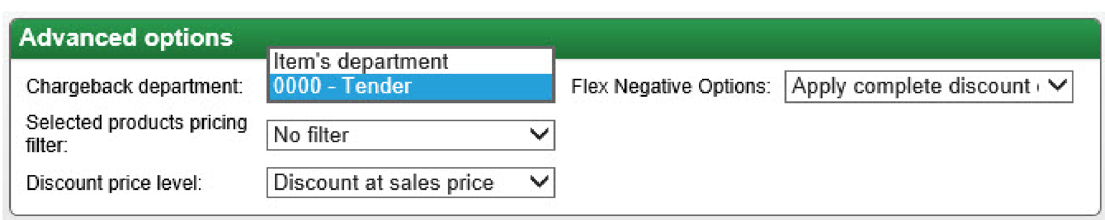
Select one of the following Flex Negative Options:

Flex Negative Option	Description
Do not apply discount if exceeds net value	The coupon is rejected; therefore, no discount is applied.
Apply discount upto net value	The coupon is honored, but the total discount is equivalent to the item's price. In this case, the item becomes a free item.
Apply complete discount even if net value goes negative	The coupon is honored, and the total discount is applied to the total transaction amount. In this case, the retailer gives the remaining amount back to the customer.

Example: The retailer scans an item with the value of $5.00. The customer then provides a loyalty card that is preloaded with a digital coupon that provides a discount of $7.00 off the item's price. The discount can be one of the following depending on the selected Flex Negative Option:

Flex Negative Option	Discount
Do not apply discount if exceeds net value	No discount.
Apply discount upto net value	The coupon is honored and the discount provided is $5.00, making the item a free item.
Apply complete discount even if net value goes negative	The total discount of $7.00 is applied, and the retailer gives $2.00 back to the customer.

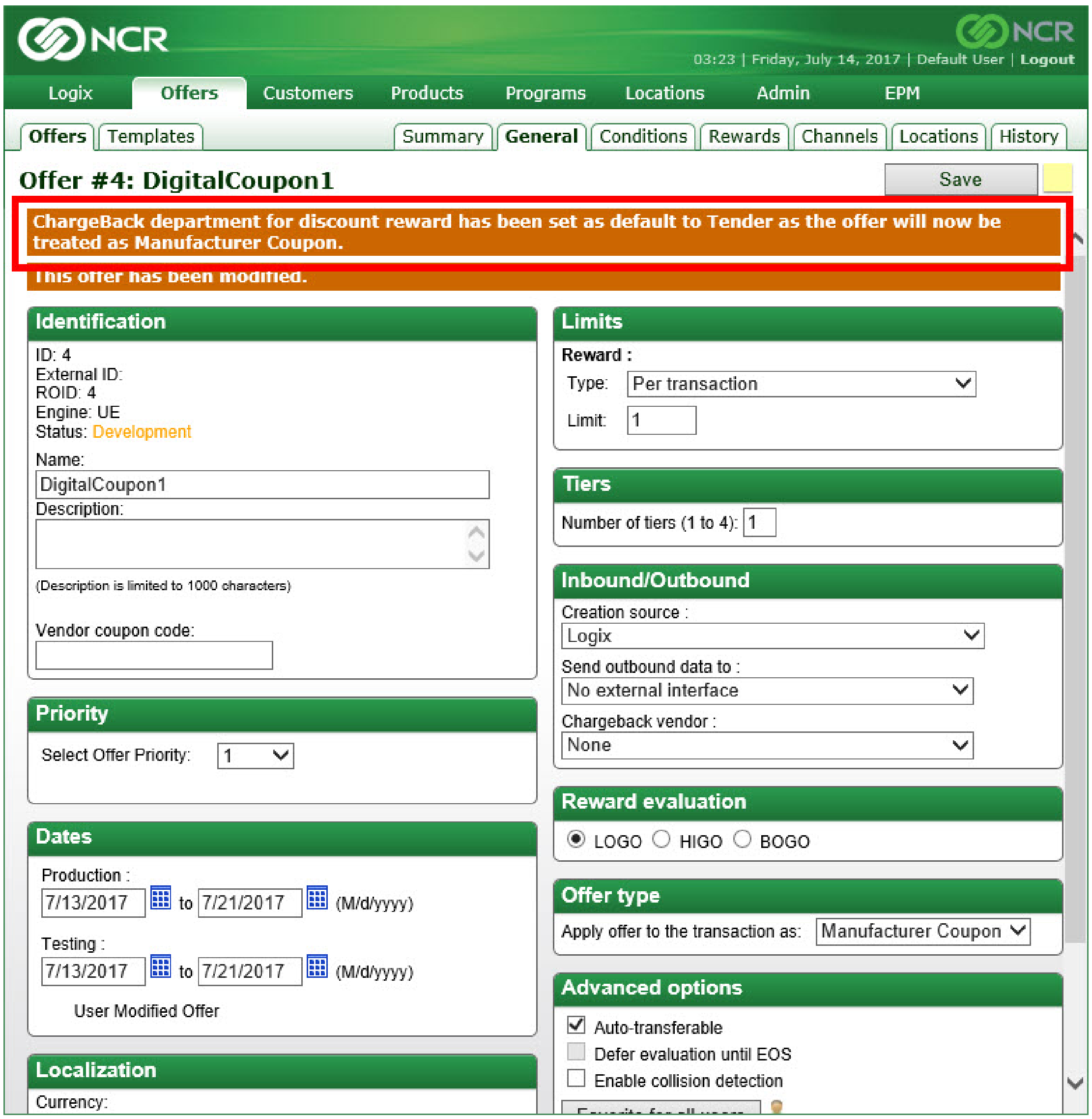
11. In the *Advanced options* section, the *Chargeback department* option displays the default value depending on the selected *Apply offer to the transaction as* option.



The following table displays the default *Chargeback department* values of the digital coupons.

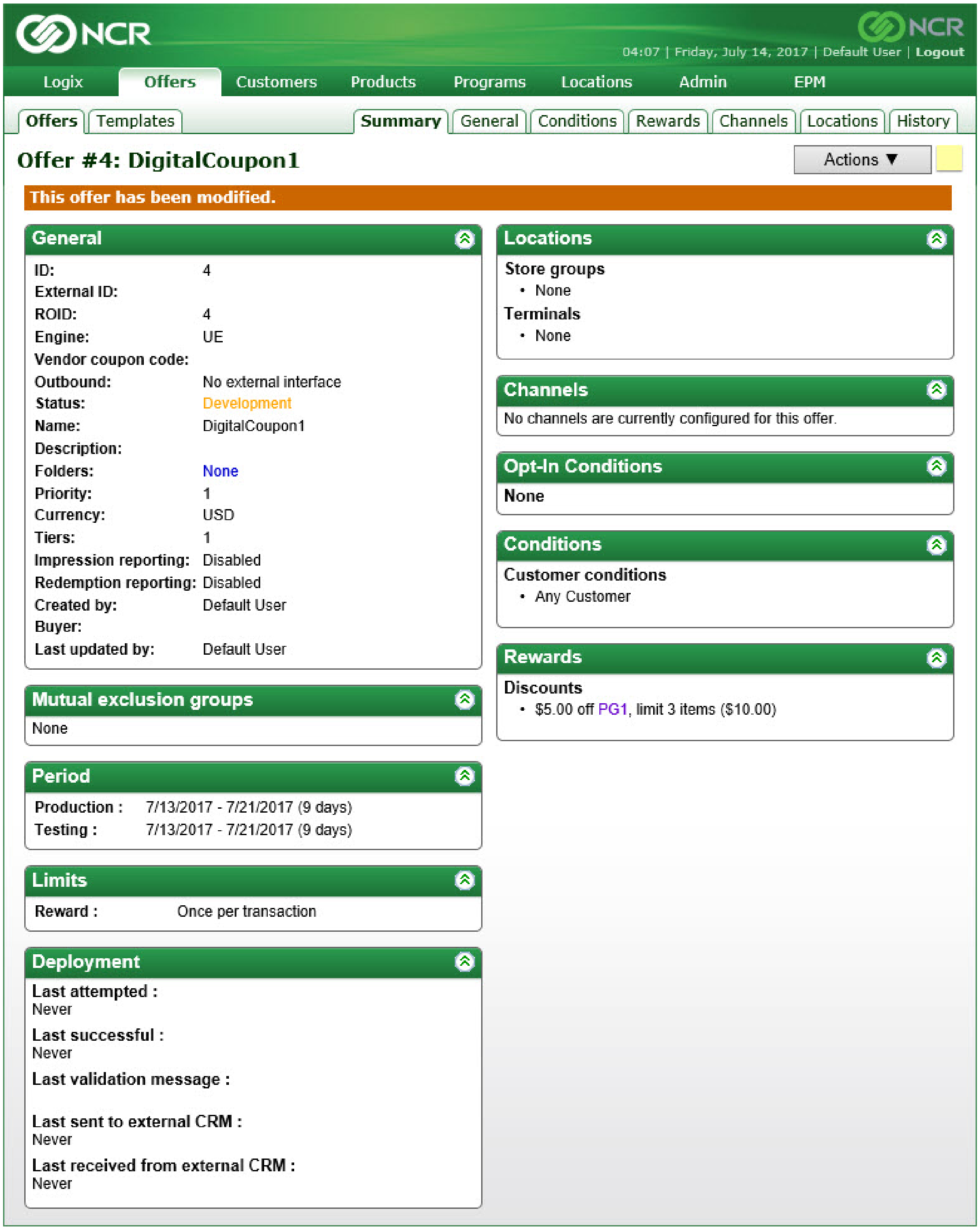
Apply offer to the transaction as	Default value of Chargeback department
Manufacturer Coupon	000 – Tender
Store Coupon	Item's department

Note: If you switch the value of the *Apply offer to the transaction as* option to a different value in the General page, the *Chargeback department* value also changes. Logix then displays a message about this change. In the following example, the value was changed from Store Coupon to Manufacturer Coupon.



12. Select **Save**.

13. Select the **Channels** tab to set the Delivery Selection settings. For more information, refer to *Offer Channels* on page 339.
14. Select the **Locations** tab to set the store groups and terminals for this offer. For more information, refer to *Offer Locations* on page 354.
15. Select the **Summary** tab. The offer details are displayed.



16. Select **Actions→Deploy** to deploy the offer.

Note: The selected option for the **Apply offer to the transaction as** setting is carried over when the offer is copied, imported, or exported, or when the offer is used to create a template. Also, if a template has an existing option for this same setting, it is carried over when the template is copied or is used to create a new offer.

Using UPC5 Coupons

The **Universal Product Code 5 (UPC5) coupons** are manufacturer paper coupons that display barcodes designed to provide discounts on certain items in transactions. These discounts are provided by the item's manufacturer.

When a customer presents a UPC5 coupon in a transaction, the retailer honors the coupon by scanning it. When an item in the transaction matches the manufacturer and the family codes of the UPC5 coupon, deductions of the value representing the value code of the coupon are applied.

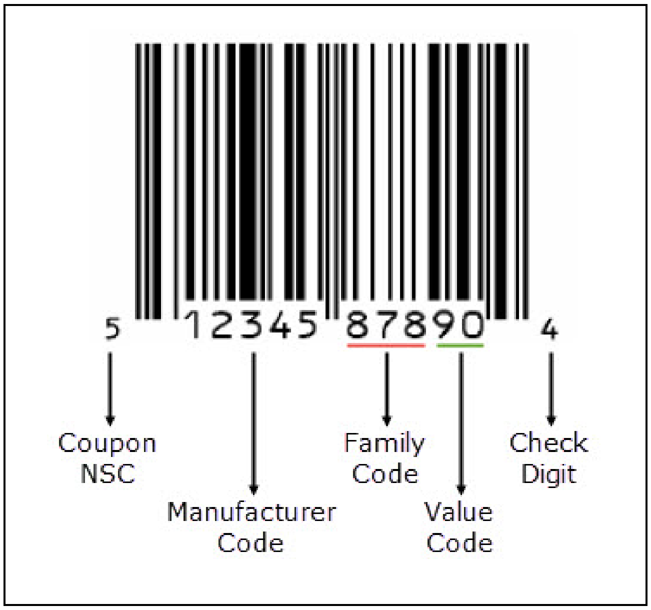
The customer can decide not to continue using the coupon within the transaction, in which case the retailer can revoke the use of the coupon and the rewards awarded. The customer can still then use the UPC5 coupon in another future transaction.

Parts of a UPC5 Coupon

The UPC5 coupon is composed of five parts.

Part	Description
Coupon Number System Character (NSC)	The single–digit coupon NSC value, which is 5. This value tells the POS system that it has scanned a coupon.
Manufacturer Code	The 5–digit manufacturer code or ID. This code is the same manufacturer code that is displayed on the item's bar code. This part is also known as the Company Prefix.
Family Code	The 3–digit family code assigned to an item. Manufacturers assign family codes to their items. When the UPC5 coupon is scanned, the family code determines whether the target item is included in the transaction.
Value Code	The 2–digit code that indicates the redemption value of the coupon. The value codes and their respective face values are defined in the Coupon Value Codes table. For more information, refer to *UPC5 Coupon Value Codes* on page 760.
Check Digit	The last digit of the UPC5 coupon. The value of this digit is calculated from the preceding 11 digits.

The following image displays the different parts of the UPC5 coupon relative to each other.



When an item in the transaction matches the manufacturer and the family codes of the UPC5 coupon, deductions of the value representing the value code of the coupon are applied. However, if the purchase requirements of the UPC5 coupon are not met (for example, Buy 2 or more), or if the transaction does not have an item that matches the manufacturer and the family codes of the coupon, the coupon is rejected.

UPC5 Coupon Value Codes

The following table displays the value codes and their respective face values that are used in UPC5 coupons.

Value Code	Face Value	Value Code	Face Value
01	Free Merchandise	51	Buy 2 or More–Get $2.00 Off
02	Buy 4–Get 1 Free (same Product)	52	Buy 3 or More–Get $0.55 Off
03	$1.10	53	Buy 2 or More–Get $0.10 Off
04	$1.35	54	Buy 2 or More–Get $0.15 Off
05	$1.40	55	$0.55
06	$1.60	56	Buy 2 or More–Get $0.20 Off
07	Buy 3 or More–Get $1.50 Off	57	Buy 2–Get $0.25 Off
08	Buy 2 or More–Get $3.00 Off	58	Buy 2–Get $0.30 Off
09	Buy 3 or More–Get $2.00 Off	59	$0.59
10	$0.10	60	$0.60
11	$1.85	61	$10.00
12	$0.12	62	$9.50
13	Buy 4 or More–Get $1.00 Off	63	$9.00
14	Buy 1–Get 1 Free (same Product)	64	$8.50
15	$0.15	65	$0.65
16	Buy 2–Get 1 Free (same Product)	66	$8.00
17	Reserved–Future Use	67	$7.50
18	$2.60	68	$7.00
19	Buy 3–Get 1 Free	69	$0.69
20	$0.20	70	$0.70
21	Buy 2 or More–Get $0.35 Off	71	$6.50
22	Buy 2 or More–Get $0.40 Off	72	$6.00
23	Buy 2 or More–Get $0.45 Off	73	$5.50
24	Buy 2–Get $0.50 Off	74	$5.00
25	$0.25	75	$0.75
26	$2.85	76	$1.00

Value Code	Face Value	Value Code	Face Value
27	Reserved–Future Use	77	$1.25
28	Buy 2–Get $0.55 Off	78	$1.50
29	$0.29	79	$0.79
30	$0.30	80	$0.80
31	Buy 2 or More–Get $0.60 Off	81	$1.75
32	Buy 2 or More–Get $0.75 Off	82	$2.00
33	Buy 2–Get $1.00 Off	83	$2.25
34	Buy 2 or More–Get $1.25 Off	84	$2.50
35	$0.35	85	$0.85
36	Buy 2 or More–Get $1.50 Off	86	$2.75
37	Buy 3 or More–Get $0.25 Off	87	$3.00
38	Buy 3 or More–Get $0.30 Off	88	$3.25
39	$0.39	89	$0.89
40	$0.40	90	$0.90
41	Buy 3 or More–Get $0.50 Off	91	$3.50
42	Buy 3 or More–Get $1.00 Off	92	$3.75
43	Buy 2 or More–Get $1.10 Off	93	$4.00
44	Buy 2 or More–Get $1.35 Off	94	Reserved–Future Use
45	$0.45	95	$0.95
46	Buy 2 or More–Get $1.60 Off	96	$4.50
47	Buy 2 or More–Get $1.75 Off	97	Reserved–Future Use
48	Buy 2 or More–Get $1.85 Off	98	Buy 2 or More–Get $0.65 Off
49	$0.49	99	$0.99
50	$0.50	00	Checker Intervention

Note: Currently, AMS does not support value code 00.

Using GS1 DataBar Coupons

The **GS1 DataBar coupons** are store and manufacturer paper coupons that display barcodes designed to identify the conditions (purchase rules) of the coupon offer and the reward (save value) that is offered to the customer.

The **store** GS1 DataBar coupons are created by retailers for use in their stores. The retailers provide the discounts from these store GS1 coupons. The **manufacturer** GS1 DataBar coupons contain discounts that are provided by manufacturers.

Parts of a GS1 DataBar Coupon

The GS1 DataBar coupon is composed of the following **required** parts.

Required Part	Description
Application Identifier	The value of this field is 8110, which tells the POS system that it has scanned a coupon.
Primary GS1 Company Prefix	The Company Prefix of the manufacturer where the primary purchase requirement item belongs to.
Offer Code	A code that is assigned by the manufacturer or the retailer to identify this offer.
Save Value	The value of the coupon offer. The format of the Save Value is defined by the Save Value Code. If the Save Value Code is not included in the bar code, the default code is 0, which translates to "cents off" the qualifying purchase items. For more information about the Save Value Code, refer to optional parts table.
Primary Purchase Requirement	The quantity of items that the customer must purchase to receive the coupon offer.
Primary Purchase Requirement Code	Defines the format of the primary purchase requirement. The value can be one of the following: • 0–the threshold number of units to purchase. • 1—the threshold cash value of the accumulative total of the qualifying purchase items (2 decimals). • 2—the threshold cash value of the total transaction (2 decimals). • 3—the threshold number of pounds (2 decimals). • 4—the threshold number of kilograms (3 decimals). • 9—cashier intervention is required.
Primary Purchase Family Code	The family code that is assigned by the manufacturer or the store to identify the qualifying family of products that the customer must buy to receive the coupon offer.

The following table displays the **optional** parts of the GS1 DataBar coupon.

Optional Part	Description
2nd Purchase Requirement	The second quantity of items that the customer must purchase to receive the coupon offer.
2nd Purchase Requirement Code	Defines the format of the second purchase requirement. The value can be one of the following: • 0–the threshold number of units to purchase. • 1—the threshold cash value of the accumulative total of the qualifying purchase items (2 decimals). • 2—the threshold cash value of the total transaction (2 decimals). • 3—the threshold number of pounds (2 decimals). • 4—the threshold number of kilograms (3 decimals). • 9—cashier intervention is required.
2nd Purchase Family Code	The second family code that is assigned by the manufacturer or the retailer to identify the second qualifying family of products that the customer must buy to receive the coupon offer.
2nd Purchase GS1 Company Prefix	The Company Prefix that identifies the manufacturer of the second requirement.
3rd Purchase Requirement	The third quantity of items that the customer must purchase to receive the coupon offer.
3rd Purchase Requirement Code	Defines the format of the third purchase requirement. The value can be one of the following: • 0–the threshold number of units to purchase. • 1—the threshold cash value of the accumulative total of the qualifying purchase items (2 decimals). • 2—the threshold cash value of the total transaction (2 decimals). • 3—the threshold number of pounds (2 decimals). • 4—the threshold number of kilograms (3 decimals). • 9—cashier intervention is required.
3rd Purchase Family Code	The third family code that is assigned by the manufacturer or the retailer to identify the third qualifying family of products that the customer must buy to receive the coupon offer.

Optional Part	Description
3rd Purchase GS1 Company Prefix	The Company Prefix that identifies the manufacturer of the third requirement.
Additional Purchase Rules Code	The code that specifies which items (primary, second, or third) must the customer purchase to qualify in the coupon offer. The code can be one of the following: • 0—indicates that either the primary, second, or third item can be used to validate the offer. • 1—indicates that all of the items (primary, second, and third) must be purchased to validate the offer. • 2—indicates that the primary item, together with either one of the second or third item, must be bought to validate the offer. • 3—indicates that the second or third family code and company prefix can be used to satisfy the primary purchase requirement instead of the primary item. In this case, the second and the third purchase requirements are ignored.
Save Value Code	The code that defines the format of the Save Value. The code can be one of the following: • 0—cents off the qualifying purchase items. This is the default value. • 1—one item is free if the Save Value is 0 (zero). If the Save Value is greater than zero, the maximum number of free items is equal to the Save Value. • 2—the number of free items is equal to the Save Value. • 5—percent off the qualifying purchase items. • 6—cents off the final transaction amount.
Save Value Applies to (SVAT) Which Item	If there are multiple purchase requirements (Additional Purchase Rules Code is either 1 or 2), this value indicates which qualifying item the offer applies to. The value can be one of the following: • 0—offer applies to the primary qualifying item. • 1—offer applies to the second qualifying item. • 2—offer applies to the third qualifying item. For more information on the SVAT rules, refer to *Save Value Applies To (SVAT) Rules* on page 766.

Purchase Requirement Code and Save Value Code Rules

If the Purchase Requirement Code (PRC) value is 1 and the Save Value Code (SVC) value is 6 of the GS1 coupon, the purchase conditions are validated against the threshold cash value of the accumulative total of the qualifying purchase items.

Example: Save $5.00 off the transaction when you spend $10.00 on hair care products.

Case	Items purchased by the customer	Discount	Total transaction payment
1	• Pro Shampoo (4 pieces at $1 each) • Body Soap (4 pieces at $2 each)	No discount	$12
2	• Pro Shampoo (4 pieces at $1 each) • Conditioner (4 pieces at $2 each)	$5 on the basket total	$7

Save Value Applies To (SVAT) Rules

If there is a single or multiple purchase requirements, which means the Additional Purchase Rules Code (APRC) value is 0, 1, 2, or 3, the SVAT value indicates which qualifying item the offer applies to. The value can be one of the following:

- 0—offer applies to the primary qualifying item.
- 1—offer applies to the second qualifying item.
- 2—offer applies to the third qualifying item.

APRC value is 0

If the APRC is 0, which means either the primary qualifying item, the second qualifying item, or the third qualifying item can be used to validate the offer, the SVAT value determines which item the discount should be applied to. Because there is no assurance that the SVAT item exists in the transaction, the following business rules are implemented:

- If there is only one qualifying item, provide discount on the qualifying item.
- If there are multiple qualifying items, the Coupon Reward Evaluation setting (HIGO or LOGO) determines which qualifying item must be discounted. For more information about the Coupon Reward Evaluation setting, refer to *Setting the Coupon Reward Evaluation option* on page 771.

Example: Customer purchases only one qualifying item. Business rule is set to provide discount on the qualifying item.

Buy 3 packets of milk, 3 pieces of bread, OR 3 pieces of eggs, and get 10% off on milk (SVAT item that is set in the GS1 coupon).

Case	Item purchased by customer	Discount
1	Milk (3 packets at $2 each)	$0.2 on milk
2	Bread (3 pieces at $3 each)	$0.3 on bread
3	Egg (3 pieces at $1 each)	$0.1 on egg

In the above example, the SVAT value in the GS1 coupon is ignored.

Example: The Coupon Reward Evaluation setting (HIGO or LOGO) determines which qualifying item must be discounted.

Case	Coupon Reward Evaluation setting	Items purchased by customer	Discount
1	LOGO	• Bread (3 pieces at $3 each) • Egg (3 pieces at $1 each)	$0.1 on egg
2	HIGO	• Bread (3 pieces at $3 each) • Egg (3 pieces at $1 each)	$0.3 on bread

APRC value is 1

If the APRC value is 1, it means that all of the items (primary, second, and third) must be purchased to validate the offer. Because all of the purchase requirements are required, the discount is applied to the SVAT item.

APRC value is 2

If the APRC value is 2, which means that the primary qualifying item and either one of the second or the third qualifying item must be bought to validate the offer, the SVAT is used to determine the item to be discounted. Because there is no assurance that the SVAT item exists in the transaction, the following business rules are implemented:

- If SVAT is 0, discount is applied to the primary qualifying item.
- If SVAT is 1 or 2, the Coupon Reward Evaluation setting (HIGO or LOGO) determines which qualifying item must be discounted.

Example: SVAT value is 0, thus discount is applied to the primary qualifying item.

Buy 3 packets of milk with either 3 pieces of bread or 3 pieces of eggs, and get 10% off on primary qualifying item.

Case	Items purchased by the customer	Discount
1	Milk (3 packets at $2 each) Bread (3 pieces at $3 each) Egg (3 pieces at $1 each)	$0.2 on milk

Example: SVAT value is 1 or 2, thus the Coupon Reward Evaluation setting (HIGO or LOGO) determines which qualifying item must be discounted.

Buy 3 packets of milk with either 3 pieces of bread or 3 pieces of eggs, and get 10% off on the SVAT item. Coupon specifies that the SVAT item is bread.

Case	Coupon Reward Evaluation setting	Items purchased by the customer	Discount
1	LOGO	• Milk (3 packets at $2 each) • Bread (3 pieces at $3 each) • Egg (3 pieces at $1 each)	$0.1 on egg

In this example, the SVAT value is ignored and the discount is given to the lowest-priced qualifying item.

APRC value is 3

If the APRC value is 3, the second or the third family code and company prefix can be used to satisfy the primary purchase requirement instead of the primary item. In this case, the second and the third purchase requirements and purchase requirement codes are ignored. The SVAT value is also ignored because there is no assurance that the SVAT item exists in the transaction. The following business rules are implemented:

- If there is only one qualifying item, provide discount on the qualifying item.
- If there are multiple qualifying items, the Coupon Reward Evaluation setting (HIGO or LOGO) determines which qualifying item must be discounted.

Example: Customer purchases only one qualifying item. Business rule is set to provide discount on the qualifying item.

Buy any 3 packs of potato chips, save $1.00. In this example, the primary, secondary, and tertiary purchase requirements have different Company Prefixes (CP) and Family Codes (FC). The GS1 specifies the SVAT item, which in this example is the secondary purchase requirement.

Case	Item purchased by customer	Discount
1	Three packs of potato chips which matches the primary CP and FC (3 packs at $2 each)	$1 on potato chips
2	Three packs of potato chips which matches the secondary CP and FC (3 packs at $2 each)	$1 on potato chips
3	Three packs of potato chips which matches the tertiary CP and FC (3 packs at $2 each)	$1 on potato chips

In the above example, the SVAT value in the GS1 coupon is ignored and the discount is provided on the qualifying item in the basket.

Example: The Coupon Reward Evaluation setting (HIGO or LOGO) determines which qualifying item must be discounted.

Case	Coupon Reward Evaluation setting	Items purchased by customer	Discount
4	HIGO	• Potato Chips A: One pack of potato chips which matches the primary CP and FC (1 pack at $1.2) • Potato Chips B: One pack of potato chips which matches the secondary CP and FC (1 pack at $1.5) • Potato Chips C: One pack of potato chips which matches the tertiary CP and FC (1 pack at $2.2)	$1 on Potato Chips C

In the above example, the discount is provided to the highest-priced item.

Family Codes

The Family Code is one of the parts of a coupon bar code. The code is a three–digit number that is assigned by the manufacturer or by the retailer (for store coupons) to identify the products that are involved in the offer.

One thousand Family Code numbers (000–999) are available for use in the GS1 US Coupon Code program. These Family Codes are applicable to the UPC5 and to the GS1 DataBar coupons.

- **Family Code 000**—allows any item in the transaction that has the matching Company Prefix to validate the coupon.
- **Family Code 992**—means "No product verification." With this Family Code, the offer that is defined by the Value Code (UPC5) or by the Save Value (GS1 DataBar) is applicable on any item from any manufacturer.
- **Family Codes 001–009**—reserved for future use.
- **Family Codes 990–999 (excluding 992)**—reserved for future use.
- **Family Codes from 010 through 980 bearing a last digit of 0** (except Family Codes 100, 200, 300, 400, 500, 600, 700, 800, and 900)—reserved for use by manufacturers as **Summary Codes**. A coupon with any of these Summary Codes is validated only if the customer's transaction includes any item with a Family Code that has the same first two digits of the Summary Code. The Summary Codes are not used for individual products.

  Example: If the Family Code of the UPC5 coupon is 420, the coupon is validated only if the transaction has items that belong to the 421–429 Family Codes.
- **Family Codes 100, 200, 300, 400, 500, 600, 700, 800, and 900**—reserved for use by manufacturers as **Super Summary Codes**. A coupon with any of these Super Summary Codes is validated only if the customer's transaction includes any item with a Family Code that has the same first digit of the Super Summary Code.

  Example: If the Family Code of the UPC5 coupon is 300, the coupon is validated only if the transaction has items that belong to the 301–399 Family Codes.

Configuring Coupons

The Logix UI provides UE settings for coupons that allow retailers to perform the following:

- Set the coupon reward evaluation, whether HIGO or LOGO.
- Handle flex negative when the coupon's value is more than the eligible item's price.
- Handle unused coupons.
- Set the evaluation period for paper coupons, whether after scanning or after the total amount of the transaction is determined.
- Set the GS1 coupon savings type, whether tender or discount.
- Set the coupon stacking and priority.

Setting the Coupon Reward Evaluation option

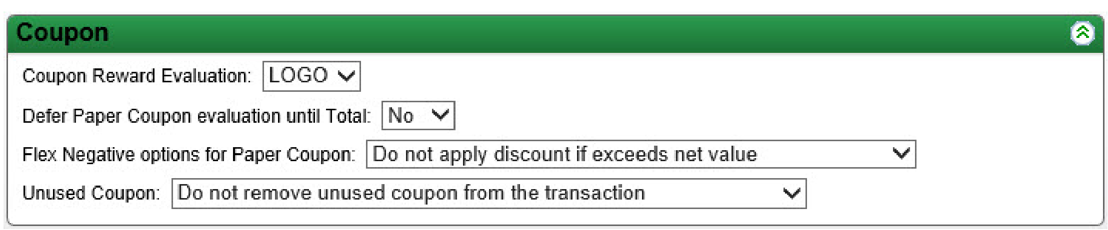
When two or more items in the transaction are eligible for the coupon reward, the retailer can select one of the following options:

- **HIGO**—highest–priced item is rewarded.
- **LOGO**—lowest–priced item is rewarded.

Example: The retailer scans 2 shirts with a unit price of $100, and 2 trousers with a unit price of $50. The retailer then scans a UPC5 coupon that says "Buy 2 or More—Get $3.00 Off." If the selected Coupon Reward Evaluation is HIGO, the discount is applied to the shirts. However, if the selected Coupon Reward Evaluation is LOGO, the discount is applied to the trousers.

To set the coupon reward evaluation option, follow these steps:

1. In Logix, select **Admin→Configuration→Settings: UE**. The UE settings page is displayed.
2. Scroll down to the **Coupon** section.



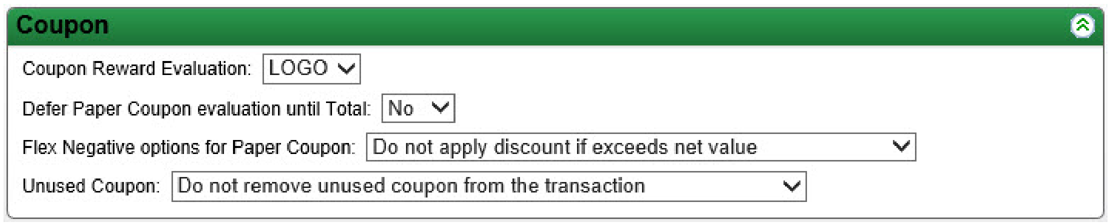
3. Set the **Coupon Reward Evaluation** option to either **HIGO** or **LOGO**.
4. Select **Save**.

Setting the Paper Coupon Evaluation Period

The retailer has the option to evaluate the paper coupons (UPC5 and GS1) either right after scanning it in the transaction, or only after the total amount of the transaction is determined.

To set the evaluation period for paper coupons, follow these steps:

1. In Logix, select **Admin→Configuration→Settings: UE**. The UE settings page is displayed.
2. Scroll down to the **Coupon** section.



3. Set the **Defer Paper Coupon evaluation until Total** option to **Yes** to evaluate paper coupons only when total amount of the transaction is determined. Otherwise, select **No**.
4. Select **Save**.

Handling Flex Negative for paper coupons

In a transaction, when the scanned coupon requires a discount that is more than the eligible item's price, the retailer has the option to reject the coupon, honor the coupon and provide a maximum discount equivalent to the item's price, or honor the coupon and provide the complete discount even if the net value becomes negative. This option, which is set in the UE settings, can be one of the following:

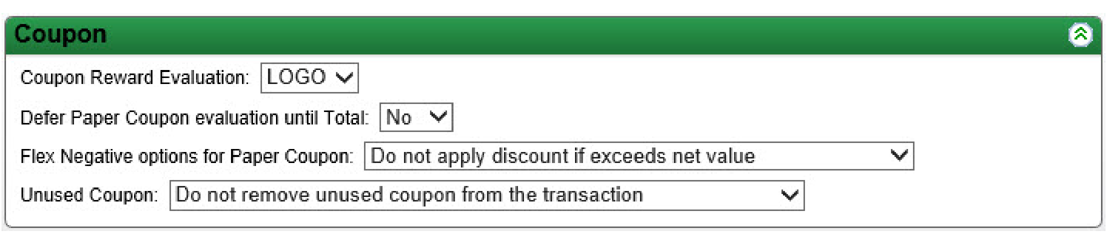
Flex Negative Option	Description
Do not apply discount if exceeds net value	The coupon is rejected; therefore, no discount is applied.
Apply discount upto net value	The coupon is honored, but the total discount is equivalent to the item's price. In this case, the item becomes a free item.
Apply complete discount even if net value goes negative	The coupon is honored, and the total discount is applied to the total transaction amount. In this case, the item's price becomes a negative value.

Example: The retailer scans an item with the value of $2.00. The customer then provides a UPC5 coupon that has a value code of 74, which translates to $5.00 off. The discount can be one of the following depending on the selected flex negative option:

Flex Negative Option	Discount
Do not apply discount if exceeds net value	No discount.
Apply discount upto net value	The coupon is honored and the discount provided is $2.00.
Apply complete discount even if net value goes negative	The total discount of $5.00 is applied, and the item's price becomes –$3.00.

To set the flex negative option, follow these steps:

1. In Logix, select **Admin→Configuration→Settings: UE**. The UE settings page is displayed.
2. Scroll down to the **Coupon** section.



3. Select one of the following from the **Flex Negative options for Paper Coupon** drop–down list:
   - Do not apply discount if exceeds net value
   - Apply discount upto net value
   - Apply complete discount even if net value goes negative
4. Select **Save**.

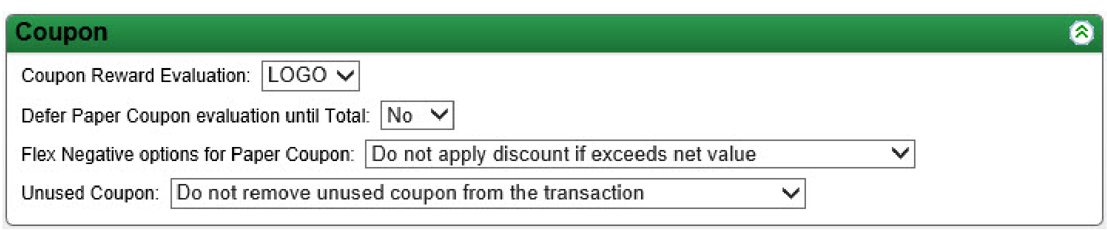
Handling Unused Coupons

Retailers can set how unused coupons in transactions are handled. The option is set in Logix.

- **Do not remove unused coupon from the transaction**—when the retailer scans a coupon, the coupon reward is provided if the conditions of the offer are met. Otherwise, the coupon remains queued in the transaction.
- **Remove unused coupon immediately**—when the retailer scans a coupon, and the conditions of the offer are not met, the coupon is immediately removed from the transaction. The system then provides a message with the reason why the reward was not provided.
- **Remove unused coupon at Total and End Transaction processing**—when the retailer scans a coupon, the coupon remains queued in the transaction until the conditions are met and the reward is provided. At Total or End Transaction processing, if the coupon remains unused, the system provides a message with the reason why the reward was not provided, and then the coupon is removed from the transaction.
- **Remove unused coupon at End Transaction processing**—when the retailer scans a coupon, the coupon remains queued in the transaction until the conditions are met and the reward is provided. At End Transaction processing, if the coupon remains unused, the system provides a message with the reason why the reward was not provided, and then the coupon is removed from the transaction.

To set the unused coupon option, follow these steps:

1. In Logix, select **Admin→Configuration→Settings: UE**. The UE settings page is displayed.
2. Scroll down to the **Coupon** section.



3. Select one of the following from the **Unused Coupon** drop–down list:
   - Do not remove unused coupon from the transaction
   - Remove unused coupon immediately
   - Remove unused coupon at Total and End Transaction processing
   - Remove unused coupon at End Transaction processing
4. Select **Save**.

Setting the GS1 Coupon Savings

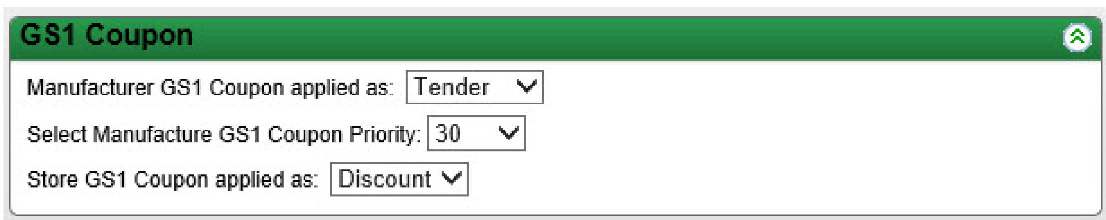
The retailer has the option to select whether to apply the GS1 DataBar coupon savings to the transaction as a tender or as a discount.

- **Tender**
- **Discount**

Note: Retailers can configure both the store and the manufacturer GS1 DataBar coupons to either tender or discount.

To set the GS1 DataBar coupon savings, follow these steps:

1. In Logix, select **Admin→Configuration→Settings: UE**. The UE settings page is displayed.
2. Scroll down to the **GS1 Coupon** section.



3. Set the **Manufacturer GS1 Coupon applied as** and the **Store GS1 Coupon applied as** options to one of the following:
   - Tender
   - Discount
4. Select **Save**.

Setting the Stacking and Priority of Coupons

In cases where the customer presents multiple coupons for an item, stacking and priority rules must be followed to determine which coupons to honor and whether to honor one or more coupons.

Note: The default priority grid is updated to include GS1, UPC5, and Digital Coupons. This new default priority grid is available only for fresh installation of Logix. For Logix upgrade, the old default priority grid still remains the default.

Coupon Stacking

The AMS system provides priority exclusion grid levels of coupons to determine how to accept and process coupons in a transaction using the priority exclusion grid. Retailers can set up their own coupon policy, such as the following:

- One manufacturer and one store coupon is allowed per item.
- One manufacturer or one store coupon is allowed per item.
- Any number of coupon is allowed on an item.
- Multiple store but one manufacturer coupon is allowed per item.
- One coupon of each type is allowed per item.
- Allow only a single store coupon (digital or paper) or an AMS offer to be applied to an item.
- Allow only one manufacturer coupon (digital or paper) to be applied to an item.

For assistance on setting up the priority exclusion grid levels for coupons, contact an NCR Professional Services consultant.

Coupon Priority

Retailers can set to prioritize the different types of coupons against each other and against other standard AMS offers.

Example: Retailers can choose to prioritize digital coupons, and then UPC5 coupons, and then AMS offers.

In cases where two or more coupons are eligible for an item and these coupons have the same priority level, the coupon is given based on the following predetermined order:

- Manual Manufacturer Coupon
- Manual Price Override Allow Markup
- Manual Price Override
- Manual Store Coupon
- Digitial Manufacturer Coupon
- GS1 Manufacturer Coupon

- UPC5 Coupon
- Digitial Store Coupon
- GS1 Store Coupon
- Manual Promotion
- Standard Logix Offers

In cases where two or more coupons of the same type is eligible for an item and these coupons have the same priority level, the coupon that provides the higher discount amount is honored by default.

Setting the priority for the digital coupons is done during creation of the offer. For more information, refer to *Creating Digital Coupons* on page 751. For information on setting the priority of the UPC5 and the GS1 coupons, refer to the next sections.

Setting the priority for UPC5 coupons

To set the priority of the UPC5 coupons, follow these steps:

1. In Logix, select **Admin→Configuration→Settings: UE**. The UE settings page is displayed.
2. Scroll down to the **UPC5 Coupon** section.

3. Select a value from the **Select UPC5 Coupon Priority** drop–down list.

Note: The lower the value, the higher the priority. Also, the selected priority is common to all UPC5 coupons.

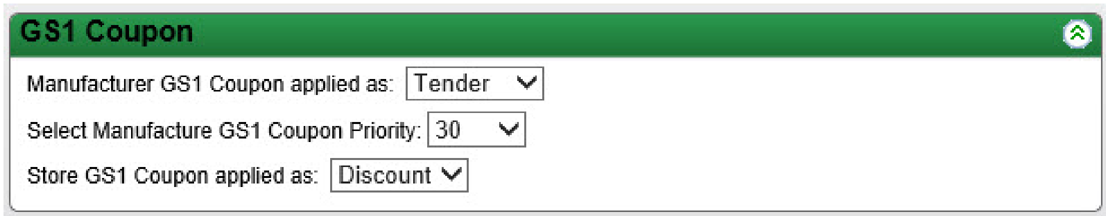
4. Select **Save**.

Setting the priority for GS1 manufacturer coupons

To set the priority of the GS1 manufacturer coupons, follow these steps:

1. In Logix, select **Admin→Configuration→Settings: UE**. The UE settings page is displayed.

2. Scroll down to the **GS1 Coupon** section.



3. Select a value from the **Select Manufacture GS1 Coupon Priority** drop–down list.

   Note: The lower the value, the higher the priority. Also, the selected priority is common to all GS1 manufacturer coupons.

4. Select **Save**.

Note: For the GS1 DataBar store coupons, the priority is set by retailers and sent through the POS in TCP/IP. Retailers can set different priorities for each GS1 store coupon.

Appendix A: Message Tags

Overview

Tags are special codes inserted into printed messages or cashier messages that produce certain effects or display certain kinds of data when they are displayed to the customer. This appendix provides a list of printed message and cashier message tags and, describes their functions.

Printed Message Tags

Unlike in HTML, most of the printed message tags supported by Logix do not have corresponding closing tags. Instead, they are all self–closing, except for the style tags described in this section which remain open and active until reset by the |NORMAL| tag (or by the end of the line, depending on the printer). Only a subset of these tags may be available for any given message.

Note: The tags that are available depend on installed printers and available engines.

Style

Once turned on, the effects of the Style tags continue until reaching the end of the line or until reset by the |NORMAL| tag, depending on the printer.

<table>
<tr><th>Style Tag</th><th>Description</th></tr>
<tr><td>|B|</td><td>Bold-face text</td></tr>
<tr><td>|I|</td><td>Italicized text</td></tr>
<tr><td>|U|</td><td>Underlined text</td></tr>
<tr><td>|V|</td><td>Overlined text</td></tr>
<tr><td>|INV|</td><td>Inverted text, that is, white letters on black background.</td></tr>
<tr><td>|SMALL|</td><td>Small–sized text</td></tr>
<tr><td>|MEDIUM|</td><td>Text slightly larger than the normal size.</td></tr>
<tr><td>|MEDIUMB|</td><td>Bold text slightly larger than the normal size.</td></tr>
<tr><td>|MEDIUMWIDE|</td><td>Bold text slightly larger than the normal size, stretched to double width.</td></tr>
<tr><td>|BIG|</td><td>Large–sized text</td></tr>
<tr><td>|BIGB|</td><td>Bold large–sized text</td></tr>
<tr><td>|HIGH|</td><td>Doubles the height of text</td></tr>
<tr><td>|WIDE|</td><td>Doubles the width of text</td></tr>
<tr><td>|CENTER|</td><td>Centers text</td></tr>
<tr><td>|RIGHT|</td><td>Right justifies text</td></tr>
<tr><td>|NORMAL|</td><td>Returns all print characteristics to normal.</td></tr>
</table>

Actions

Refer to the following table for a list of description of each Action tag in Logix.

Action Tag	Description
|LINE|	Prints a horizontal line across the receipt.
|STARS|	Prints a horizontal line of asterisks across the receipt.
|LOGO|	Prints the logo in bitmap format.
|LOGOBIG|	Prints the logo in bitmap format at double size.
|CUT|	Completely cuts the receipt paper.
|CUT85|	Cuts the receipt paper by 85%.

Bar Codes

Refer to the following table for a list and description of each bar code tag in Logix.

Bar Code Tag	Description
|UPCA|[...]	Prints a UPC–A bar code. The number in brackets should be 11 digits (no check digit).
|UPCB|[...]	Prints a UPC–B bar code. The number in brackets should be 11 digits (no check digit).
|EAN13|[...]	Prints an EAN–13 bar code (also known as a JAN–13 in Japan). The number in brackets should be 13 digits.
|CODE39|[...]	Prints a Code 39 bar code. The number in brackets is the variable–length string to be encoded.

Variables

Refer to the following table for a list and description of each Variable tag in Logix.

<table>
<tr><th>Variable Tag</th><th>Description</th></tr>
<tr><td>|CUSTOMERID|</td><td>Indicates the customer ID.</td></tr>
<tr><td>|FIRSTNAME|</td><td>Indicates the customer's first name.</td></tr>
<tr><td>|LASTNAME|</td><td>Indicates the customer's surname.</td></tr>
<tr><td>|CURRDATE|</td><td>Indicates the current date.</td></tr>
<tr><td>|OFFERSTART|</td><td>Indicates the offer's production start date.</td></tr>
<tr><td>|OFFEREND|</td><td>Indicates the offer's production end date.</td></tr>
<tr><td>|NET#[...]|</td><td>Indicates the net number of points, where the argument is the promotion variable ID of the points program.</td></tr>
<tr><td>|INITIAL#[...]|</td><td>Indicates the initial number of points, where the argument is the promotion variable ID of the points program.</td></tr>
<tr><td>|EARNED#[...]|</td><td>Indicates the earned number of points, where the argument is the promotion variable ID of the points program.</td></tr>
<tr><td>|REDEEMED#[...]|</td><td>Indicates the redeemed number of points, where the argument is the promotion variable ID of the points program.</td></tr>
<tr><td>|TSD|</td><td>Indicates the total savings to date.</td></tr>
<tr><td>|LYTS|</td><td>Indicates the total savings for the previous year.</td></tr>
<tr><td>|HHSTD|</td><td>Indicates the household–level savings to date.</td></tr>
<tr><td>|TOTALPOINTS|</td><td>Indicates the customer's total points balance in the offer's program.</td></tr>
<tr><td>|PTSASPEN|</td><td>Indicates the number of points formatted to display in decimal currency form. (15 points would display as 0.15.)</td></tr>
<tr><td>|ACCUMAMT|</td><td>Indicates the amount the customer has earned toward the offer's accumulation threshold (if any).</td></tr>
<tr><td>|REMAINAMT|</td><td>Indicates the remaining amount the customer must gain to reach the offer's accumulation threshold (if any).</td></tr>
<tr><td>|NET$[...]|</td><td>Indicates the net value of a discount in dollars, where the argument is the promotion variable ID of the discount.</td></tr>
<tr><td>|INITIAL$[...]|</td><td>Indicates the initial value of a discount in dollars, where the argument is the promotion variable ID of the discount.</td></tr>
</table>

<table>
<tr><th>Variable Tag</th><th>Description</th></tr>
<tr><td>|EARNED$[...]|</td><td>Indicates the earned value of a discount in dollars, where the argument is the promotion variable ID of the discount.</td></tr>
<tr><td>|REDEEMED$[...]|</td><td>Indicates the redeemed value of a discount in dollars, where the argument is the promotion variable ID of the discount.</td></tr>
<tr><td>|SVBAL[...]|</td><td>Indicates the user's store value balance in a selected program.</td></tr>
<tr><td>|SVBALEXP[...]|</td><td>Indicates the expiration date of the selected program's balance.</td></tr>
<tr><td>|SVVAL[...]|</td><td>Indicates the total value earned in a selected stored value program.</td></tr>
<tr><td>|SVVALEXP|</td><td>Indicates the expiration date of the selected program's value.</td></tr>
<tr><td>|SVLIMIT[...]|</td><td>Indicates the unit limit of the selected stored value program.</td></tr>
<tr><td>|SVREDEEM[...]|</td><td>Indicates the stored value redeemed in the specified program during the transaction.</td></tr>
<tr><td>|SVSCRATIO[...,...,...]|</td><td>Indicates the stored value redemption ratio for all programs related to the specified scorecard.</td></tr>
<tr><td>|SVRATIO[...,...,...]|</td><td>Indicates the stored value redemption ratio for the specified scorecard.</td></tr>
<tr><td>|FTSPG|</td><td>Indicates the Fuel: total savings per gallon.</td></tr>
<tr><td>|FTS|</td><td>Indicates the Fuel: total savings in current transaction.</td></tr>
<tr><td>|SCORECARD[...]|</td><td>Prints the specified scorecard.</td></tr>
<tr><td>|DSCORECARD[...]|</td><td>Prints the specified discount scorecard.</td></tr>
<tr><td>|CASHIERID|</td><td>Prints the ID of the transaction's cashier.</td></tr>
<tr><td>|POSNUM|</td><td>Prints the ID of the transaction's terminal.</td></tr>
</table>

Print Line

Discount reward or points rewards in Logix may include a short, single–line text message called a Print Line. Refer to the following table for a list and description of tags that are used exclusively in the print line.

Note: Print Line tags cannot be used in regular printed messages.

<table>
<tr><th>Print Line Tag</th><th>Description</th></tr>
<tr><td>|BASE|</td><td>Specifies the base reward as a quantity of points.</td></tr>
<tr><td>|BASES|</td><td>Specifies the base reward as a dollar amount.</td></tr>
<tr><td>|REWARD#|</td><td>Specifies the reward as a count. For example, a number of points.</td></tr>
<tr><td>|REWARD$|</td><td>Specifies the reward as a dollar amount.</td></tr>
<tr><td>|USED#|</td><td>Specifies the rewarded number of points.</td></tr>
<tr><td>|USED$|</td><td>Specifies the rewarded dollar amount.</td></tr>
<tr><td>|USEDLB|</td><td>Specifies the rewarded weight in pounds.</td></tr>
<tr><td>|USEDKG|</td><td>Specifies the rewarded weight in kilograms.</td></tr>
<tr><td>|QTY|</td><td>Specifies the rewarded quantity > as "20@".</td></tr>
</table>

Cashier Message Tags

Refer to the following table for a list and description of each Cashier Message tags supported in Logix.

Cashier Message Tag	Description
|PTBAL[...]|	Indicates the customer's balance in the specified point program.
|SVBAL[...]|	Indicates the customer's balance in the specified stored value program.

Appendix B: Agents

Overview

Agents are applications in the Web server that hosts Logix. These agents are Windows Services that perform specialized functions to support the Advanced Marketing Solution (AMS). Agents are background applications that start when the Windows operating system boots. They run all the time; independent of any user.

This appendix describes each agent that run on the Web server. To manage an Agent's run frequency and enable email alerts, refer to *Modifying Agent Details* on page 600.

Core Agents

Core agents are used with any promotion engine.

Barcode Batch Generation Agent

The Barcode Batch Generation Agent generates barcodes in Logix.

Channel Purge Agent

The Channel Purge Agent deletes expired authentication tokens and cache data for `Channels.asmx` external connector from the database.

CRM Export Agent

The CRM Export Agent writes the XML of offers marked as “CRM send to export” to files in a configured storage space and creates associated records in the database.

This agent interacts with the RT database, and references the AgentInc and CommonInc libraries and file storage. Run frequency is configurable; default value is 60 seconds.

CRM Import Agent

The CRM Import Agent looks for XML files in a configured storage space and updates the associated CPE offer records in the database.

This agent interacts with the RT database, and references the AgentInc and CommonInc libraries and file storage. Run frequency is configurable; default value is 60 seconds.

Customer Removal Agent

The CustomerRemovalAgent gets the customer records from the Household customer management connector that is needed to be removed and removes it.

Customer Update Agent

The CustomerUpdateAgent looks for updated XML files in a configured storage space and either updates or creates customer records in the database.

This agent interacts with the RT and XS databases, and references the AgentInc and CommonInc libraries and file storage. Run frequency is configurable; default value is 120 seconds.

Data Export Agent

When the stored value data export option is enabled in Logix, the Data Export Agent exports stored value records to a file in a user–configurable server path, optionally in GZIP format. The agent can be configured to produce the files at specified times and on specified days, via Data Export options in the UI.

This agent interacts with the RT, XS and WH databases, and references the AgentInc and CommonInc libraries. Run frequency is configurable.

DB Purge Agent

The DBPurgeAgent deletes offers, product groups and customer groups after they have been inactive for a configurable time period. This agent also cleans up old reporting and history data.

This agent interacts with the RT and XS databases, and references the AgentInc and CommonInc libraries. Run frequency is daily (at midnight).

Groupmembership Move Agent

The Groupmembership Move Agent moves customers to a customer group.

Household Update Agent

All Householding requests are centralized in Logix and processed by the Household Update Agent (HUA). Two operations are processed by the HUA: “Add to household” and “Remove from household”. Both options load up all the household interface options used in processing householding request. The HUA runs periodically at a configurable interval. Each time the agent runs, it queries the HouseholdQueue table to determine if there are any pending actions to process. Each entry in the queue table is processed in the order in which it was received.

Location Hierarchy Agent

The Location Hierarchy Agent looks for XML files on a configured file storage space and updates/creates store entries in the location hierarchy in the database.

This agent interacts with file storage and the RT database, and references the AgentInc and CommonInc libraries. Run frequency is configurable; default value is 120 seconds.

Location Update Agent

The Location Update Agent looks for XML files in a configured storage space and updates/creates location (store) records in the database.

This agent interacts with file storage and the RT database, and references the AgentInc and CommonInc libraries. Run frequency is configurable; default value is 120 seconds.

Offer Customer Agent–MT (OCAMT)

The OCAMT processes files generated by the "AddCustomers", "RemoveCustomers", "ClipBundle", and "UnclipBundle" methods of the EOC. Multiple instances of the OCAMT may be running concurrently on multiple machines to improve processing throughput. Each OCAMT instance starts one or more Worker threads to handle the data processing.

This agent creates a log for each worker thread. The log files do not appear in the log viewer but, they are accessed at `<log root>\OfferCustomerMT_Worker_<id>.<date>.txt`. Worker IDs are set by the agent and start with 0.

The OCAMT has the option to send CustomerGroup data changes directly to the Local Servers in which that CustomerGroup is used. This functionality may be referred to as "direct–to–store," which has the advantage of quickly delivering updated CustomerGroup relationships to the Local Servers.

The OCAMT uses ComWorker threads to perform the "direct–to–store" operation, which is only available through the "ClipBundle" and "UnclipBundle" methods of the EOC. When the "direct–to–store" feature is disabled, CustomerGroup relationships are sent to the Local Servers via TransDownload or IncentiveFetch.

Offer Customer Failover Agent

The Offer Customer Failover Agent moves failed clips to transDownload.

Offer Import Agent

The Offer Import Agent provides a versatile and flexible mechanism for quickly loading many offers from an external source into Logix using XML files as the means of transmission. Successfully imported offers can access all functionalities and features available to internally created Logix offers.

The agent imports offers when one or more XML–formatted files are placed in an agent–monitored directory. These XML files may have any filename; however, a file must have two parts added to the end of the filename. First, an underscore followed by the name of the external data source. Second, an extension of “oia” in order for the agent to identify this as an offer import agent file.

Example: `Offer123_EME.oia`

Additionally, in order to be successfully processed, the files must conform to the XML schema as defined in the `OfferImport1.xsd`, found in the `[CopientInstallPath]/AgentFiles` directory.

Offer Validation Agent

The Offer Validation Agent verifies that offers, and offer components such as product groups, and customer groups and graphics, are validly–structured and free of errors; and generates validation reports that summarize the results of the verification.

Points History Movement Agent

The Points History Movement Agent migrates customer points history from one program to another.

Pref Distribution Agent

The Prefs Distribution Agent checks for customer preference value records that have been changed at the enterprise level. When new or changed records are found, it stages them for TransDownload in the LogixXS.CPE_Prefs_Output table.

PrefMV Distribution Agent

The Prefs Multi–Value Distribution Agent checks for customer preference multi-value records that have been changed at the enterprise level. When new or changed records are found it stages them for TransDownload in the LogixXS.CPE_PrefsMV_Output table.

Process Customer Groups Agent

The ProcessCustomerGroups agent scans the GMInsertQueue table in the LogixXS database for files that have been uploaded from the UI. These files are bulk inserted into the database using the configured format files located in the configured bulkinsertpath.

This agent interacts with file storage and the RT and XS databases, and references the AgentInc and CommonInc libraries. Run frequency is configurable; default value is 120 seconds.

Process Issuance

The issuance feature of Logix allows for the collection of data from promotion engine local servers related to reward deliverables distributed to customers during transactions. Issuance data is sent from each promotion engine local server to the Logix enterprise server on a regular recurring basis. Data received by Logix is stored in the LogixEX database.

Process Location Groups

Logix provides two methods for importing and updating Location groups. Groups can be uploaded directly into the Logix UI using a flat file format, or they may be imported automatically by placing an XML file, with the file extension of lgu, into the appropriate directory on the Logix server.

Process Points Programs

The Process Points Programs agent processes adjustments to customers' points balances in a specified program.

The Process Points Programs agent is a Windows Service that runs on an application server. Only a single instance of this or any AMS agent should run at a given installation. This is done to mitigate locking the database for other uses within the AMS application.

Process Product Groups

The Process Product Groups agent scans the ProdInsertQueue table in the LogixRT database for entries of files that have been uploaded from the UI. Files found are bulk inserted into the database using the configured format files located in the configured bulkinsertpath.

Uploaded product group files are simple text files (flat files) that contain one product identifier per line, with a CR/LF required at the end of each line.

This agent interacts with file storage and the RT database, and references the AgentInc and CommonInc libraries. Run frequency is configurable; default value is 120 seconds.

Process Stored Values Programs

The Process StoredValues Programs agent processes adjustments to customers' stored values balances in a specified program.

The Process StoredValues Programs agent is a Windows Service that runs on an application server. Only a single instance of this or any AMS agent should run at a given installation. This is done to mitigate locking the database for other uses within the AMS application.

Product Attribute Update Agent

The Product Attribute Update Agent updates Product Attribute information from .paua file.

Product Hierarchy Agent

The ProductHierarchyAgent looks for XML files on a configured file storage space and updates/creates entries in the product hierarchy in the database.

This agent interacts with file storage and the RT database, and references the AgentInc and CommonInc libraries. Run frequency is configurable; default value is 120 seconds.

Product Hierarchy Link Agent

The Product Hierarchy Link agent processes product hierarchy links for a specific product group. It is a Windows Service that runs on an application server. The Agent continually runs but only performs activities at certain intervals. Upon startup, it looks for work to complete and performs its tasks as long as work remains. The Agent enters a rest period when all of its necessary duties have completed, before it checks again for more work to be completed.

The Agent's rest period can be configured via the Logix user interface by a user with sufficient privileges. When a change is made to the run frequency, it may take up to 10 minutes for the agent to recognize the change and adjust its rest period. To change the frequency setting, refer to *Modifying Agent Details* on page 600.

Only a single instance of this or any AMS agent should run at a given installation. This is done to mitigate locking the database for other uses within the AMS application.

Product Update Agent

Products within Logix may be created, updated and removed using an XML-formatted file placed in an agent-monitored directory where the agent executable file will process this file and alter product data accordingly. A Windows service name AMSCopientProductUpdateAgent is installed for Logix and runs at a configurable interval set on Logix's System Health page. The Product Update Agent monitors the `[LogixInstallPath]/AgentFiles/Import` directory for files with the pua extension. When one or more files are found in this directory, the agent processes these files. During processing, product data found in the LogixRT.Products table is modified. The different actions that can be performed are as follows: Add new products, modify products data, and remove products.

Promo Movement Agent

The PromoMovementAgent imports transaction history and offer impression information uploaded by the local servers.

This agent interacts with file storage and the RT and WH databases, and references the AgentInc and CommonInc libraries and file storage. Run frequency is configurable; default value is 30 seconds.

Promo Var Agent

The Promo Var Agent resets limits on PromoVars.

Reporting Agent

The ReportingAgent collects impression, redemption and savings data for offers in which reporting is turned on and makes it available to Logix users through report–generating functionality in the UI.

This agent interacts with the WH and RT databases, and references the AgentInc and CommonInc libraries. Run frequency is configurable; default value is 120 seconds.

Report Processing Agent

The Report Processing Agent prepares reporting data in the Logix Warehouse.

TCRM Agent

The TCRM Agent moves data to/from TCRM.

Trackable Coupons Processing Agent

The Trackable Coupons Processing Agent imports trackable coupons for a specified program.

The Trackable Coupons Processing agent is a Windows Service that runs on an application server. Only a single instance of this or any AMS agent should run at a given installation. This is done to mitigate locking the database for other uses within the AMS application.

Traffic Cop Agent

The Traffic Cop Agent handles manually–adjusted data (i.e. HHIDs, UPCs, accumulation totals, points, etc.) on the server, allowing it to be shuttled by transDownload to the local servers.

Example: If a product is manually added to a product group, TrafficCop figures out at which stores that product is used and sets up the product in buffer tables to be downloaded. The same scenario applies for manually adding customers or points (a customer care agent may manually update a customer's points or accumulation for a offer) – TrafficCop takes those manually added pieces of data and allows them to be added to the points bucket or sent down to the stores where the customer shops.

This agent interacts with the WH, RT and XS databases and references the AgentInc and CommonInc libraries. Its run frequency is configurable and the default value is 120 seconds.

Trans History Movement Agent

The Trans History Movement Agent imports TransHistory Data.

Trans Redemption Movement Agent

The Trans Redemption Movement Agent imports TransRedemption Data.

TransUpdateAgents

TransUpdateAgents look for data relevant to transactional shopping activity (earned points, accumulation amounts, etc.) that were uploaded from local servers into temp tables in the XS database. TransUpdateAgents move these data from the temp tables to where they need to be, e.g. for duplication in XS from where other stores may download that data, and also for permanent relocation into the RT and WH databases.

The following table provides a list of TransUpdateAgents and the corresponding table that each one processes:

TransUpdateAgents	Table
TransUpdateAgent–GM	GroupMembership
TransUpdateAgent–PA	PointsAdjust
TransUpdateAgent–RD	RewardDistribution
TransUpdateAgent–UL	UserLocations
TransUpdateAgent–UR	UserResponses
TransUpdateAgent–YB	YellowBoxes

TransUpdateAgents	Table
TransUpdate Agent RA–N	New non–deleted RewardAccumulation
TransUpdate Agent RA–ND	New deleted RewardAccumulation
TransUpdate Agent RA–OD	Old RewardAccumulation
TransUpdate Agent SF	StoredFranking
TransUpdate Agent SV	StoredValue

These agents interact with the WH, RT and XS databases and reference the AgentInc and CommonInc libraries. Their run frequencies are configurable and the default value is 120 seconds.

Watch Dog

The WatchDog agent monitors all the other agents running on the server and notes those that haven't run during a certain period. It also monitors local servers and the LastSync table in the LogixRT database, and looks for servers and Logix agents that haven't completed in a timely basis. When it finds any, it sends warning emails.

Note: Timeframes for agent inactivity are defined in the LogixRT.LastSync table. Timeframes for store inactivity can be adjusted under the “Watchdog store alert frequency” setting.

This agent interacts with the RT database, and references the AgentInc and CommonInc libraries. Run frequency is configurable; default value is 120 seconds.

UE–specific Agents

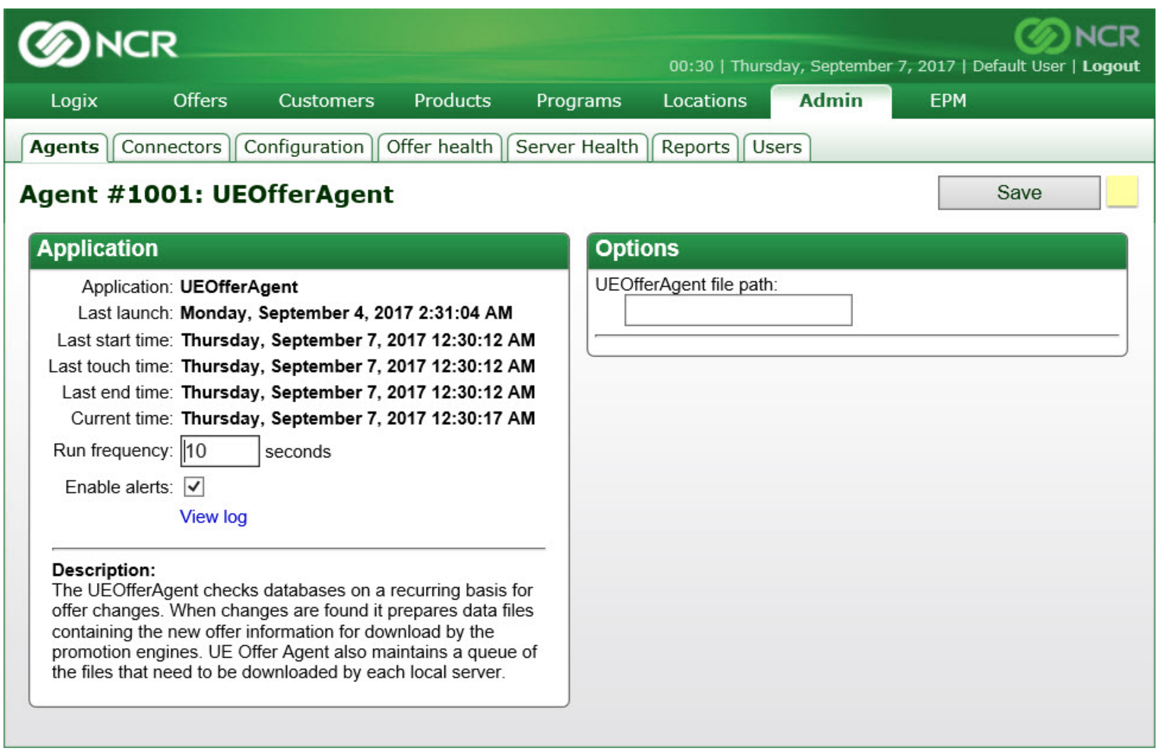
The following section provides information on the agents that are specific only for the UE promotion engine.

AttributeProductGroup Builder Agent

Attribute PG Builder Agent builds the group of products based on the attribute value/pairs specified for product groups and products. This agent starts processing products after a user has saved changes to the attribute–based product group (from UI/process product group agent) or attributes–based products (from product update agent).

UE Offer Agent

The UE Offer Agent checks databases, on a recurring basis, for offer changes. When changes are found, the agent prepares data files with new offer information that are downloaded by local servers. It also maintains a queue of the file that needs to be downloaded for each local server.



UE Offer Agent File Path

The file path can be set in the Logix UI, specifically at the UE Offer Agent page. It can be a path from the same machine or a network path. If file path is set, output files are generated in the folder for which the path is set. If the file path is not set, the output files are generated at the `[LogixInstallPath]\AgentFiles\Export\UE` folder by default.

Note: Assign the **CopientWeb** and the **CopientSVC** users the read/write permission to the UEOfferAgentFilePath location.

Message Sender Agent

The Message Sender agent runs only in UE Enterprise mode and sends customer–related changes to Customer Broker through RabbitMQ (`https://www.rabbitmq.com/`) AMQP messaging server.

The Message Sender agent is a Windows Service that runs on an application server. Only a single instance of this or any AMS agent should run at a given installation. This is done to mitigate locking the database for other uses within the AMS application.

Message Receiver Agent

The Message Recevier agent runs only in UE Enterprise mode and receives customer–related changes from Customer Broker through RabbitMQ (`https://www.rabbitmq.com/`) AMQP messaging server.

The Message Receiver agent is a Windows Service that runs on an application server. Only a single instance of this or any AMS agent should run at a given installation. This is done to mitigate locking the database for other uses within the AMS application.

Trans Update Agent PREF

The TransUpdateAgent–PREF agent is used to receive preference data resulting from the execution of offers on store level servers.

Trans Update Agent PREFMV

The TransUpdateAgent–PREFMV agent is used to receive preference Multi–value data resulting from the execution of offers on store level servers.

Appendix C: Log Files

Overview

Logix maintains a log file on an application's specific activity. By default, log files show the activities of the current day. These logs can be accessed by selecting the Logs button at the top of the application page. This appendix describes each log file.

AltIDWebService Log

The AltIDWebService Log records activity and errors produced by the operation of the AltID connector.

Barcode Batch Generation Agent Log

The Barcode Batch Generation Agent Log records the activity of the Barcode Batch Generation Agents, which monitors and processes bar code data on a recurring basis.

Browser Log

The Browser Log records data about the web browsers and operating systems that are used to access Logix.

Channel Purge Agent Log

The Channel Purge Agent Log records the activities of the Channel Purge Agent. For more information, refer to *Core Agents* on page 790.

CRM Export Agent Log

The CRM Export Agent Log records the export activity of the CRMImportExport Agent that monitors specifically for offers in which users have selected "Send outbound" from the Logix UI.

CRM Import Agent Log

The CRM Import Agent Log records the import activity of the CRM Import Agent that monitors any import of offer data from outside the Logix UI on an external CRM source.

Customer Removal Agent Log

The Customer Removal Agent Log records the number of customers removed by the Customer Removal Agent each time it runs, and the date and time of the removal.

Customer Update Agent Log

The Customer Update Agent Log records changes made to individual customer and household records.

Data Export Agent Log

The Data Export Agent Log records details of any automatic exports conducted by Logix.

DBPurge Agent Log

The DBPurge Agent Log records details of the DBPurge Agent's activity, including the number and type of files purged (distribution files, export files, expired records, etc.).

EOC Acceptance Log

The EOC Acceptance Log records successful calls to operations within the External Offer Connector, including date, time and source.

EOC Rejection Log

The EOC Rejection Log records unsuccessful calls to operations within the External Offer Connector, including date, time, source, and error code.

Error Log

The Error Log records internal server errors, including problems with stored procedures, tables, queries, syntax, and so forth.

Household Update Agent Log

The Household Update Agent Log records the actions of the Household Update Agent: adding offers to customers.

IssuanceDataLog

The IssuanceDataLog records the issuance data sent from each promotion engine local server to the Logix enterprise server on a recurring basis.

LDAP Log

The LDAP Log records the date and time of each failed LDAP login attempt.

Location Hierarchy Agent Log

The Location Hierarchy Agent Log records the ID number and location of any nodes that have been updated or added, and the location of these nodes in the hierarchy. It also records which stores in the hierarchy were added or updated and any errors that occur during the processing those updates or changes.

Location Update Agent Log

The Location Update Agent Log records changes made to individual stores.

Login Log

The Login Log records the date and time of each login attempt, including the username and IP address of the person attempting access.

Mass Action on Folders/External Offers

The mass action log gives the information about the message related to mass action performed on the Offers stored in folders. It gives information about different operations that are performed on the offers in a folder like Deployment\Duplicate\Transfer, and so forth. It shows the corresponding message of a successful or failed operation, including time and date. For more information, refer to *Performing Mass Actions* on page 82.

Message Receiver Agent Log

The Message Receiver Agent Log records customer–related changes received from Customer Broker through RabbitMQ (http://www.rabbitmq.com/) AMQP messaging server.

Message Sender Agent Log

The Message Sender Agent Log records customer–related changes sent from Customer Broker through RabbitMQ (http://www.rabbitmq.com/) AMQP messaging server.

Offer Import Agent

The Offer Import Agent records the offers that are imported in the external source into Logix using the XML files as the means of transmission.

Offer Validation Agent Log

The Offer Validation Agent Log records the date and time of each automatic offer revalidation, or manual revalidations initiated through the Offer Health page in Logix. It also shows the total number of offers validated.

Points History Movement Agent Log

The Points History Movement Agent Log records the transfer of points that are processed by the Points History Movement Agent.

Points Update Connector Log

The Points Update Connector Log records the activity of the Points Update Connector, which is designed to receive a list of customers to adjust points in a specified program.

Process Customer Groups Log

The Process Customer Groups Log records the activity of Process Customer Groups Agent. When customer groups are uploaded, the agent takes the uploaded files and populates their information into the database.

Process Location Groups Log

The Process Location Groups Log records the activities of the Process Location Groups Agent, which monitors data processing on location groups and associated locations.

Process Points Agent Log

The Process Points Agent Log records the activity of Process Points Agent, which monitors for imported program adjustments on a recurring basis.

Process Product Groups Log

The Process Product Groups Log records the activities of the Process Product Groups Agent, which monitors changes in product groups and associated products.

Process Stored Values Agent Log

The Process Stored Values Agent Log records the activity of the Process Stored Values Agent, which monitors for imported stored value program adjustments on a recurring basis.

Product Attribute Update Agent Log

The Product Attribute Update Agent Log records the activities of the Product Attribute Update Agent, which monitors the changes to product attributes.

Product Hierarchy Agent Log

The Product Hierarchy Agent Log records the ID number and location of any nodes that have been updated or added, and the location of these nodes in the hierarchy. It also records which products in the hierarchy were added or updated and any errors that occur during the processing of such additions or changes.

Product Hierarchy Link Agent Log

The Product Hierarchy Link Agent Log records the activities of product hierarchy links for a specific product group.

Product Update Agent Log

The Product Update Agent Log records changes made to individual product records.

PromoMovement Agent Log

The PromoMovement Agent Log records the agent's regular resetting of promotion variables.

Report Processing Agent Log

The Report Processing Agent Log records the activity of the Reporting Agent, which collects impressions, redemption, and savings data for offers in which reporting is enabled and available to Logix users.

TCRM Agent Log

The TCRM Agent Log records any activity with Teradata, such as transmission of offers or groups.

Trackable Coupon Processing Agent Log

The Trackable Coupon Processing Agent Log records importation and processing of trackable coupons. It also records any coupon or system errors that occur during importation or processing.

TransHistory Movement Agent Log

The TransHistory Movement Agent Log records the activities of the TransHistory Movement Agent, which monitors the movement of the transaction history in Logix.

TransRedemption Movement Agent Log

The TransRedemption Movement Agent Log records the process of imports TransRedemptions Data that is processed by the TransRedemption Movement Agent.

TransUpdateAgent_PREF

The TransUpdateAgent_PREF records preference data resulting from the execution of offers on store level servers.

TransUpdateAgent_PREFMV

The TransUpdateAGent_PREFMV records preference multi–value data resulting from the execution of offers on store level servers.

UE– IncentiveFetchLog

The UE–IncentiveFetcthLog records the activity of the UE–Incentive connector, which checks the queue and builds a list of the files that needs to be retrieved.

UE–InstantWinLog

The UE–InstantWinLog records activity relating to the use of EIW triggers in installations using enterprise instant win.

UE Offer Agent Log

The UE Offer Agent Log checks databases on a recurring basis for offer changes.

UE–GetCustomerInfoLog

The UE–GetCustomerInfoLog records changes and updates to customer information.

UE–LS–HealthLog

The UE–LS–HealthLog records when local server health records are processed and if any errors occurred.

UE–MessagingLog

The UE–MessagingLog records the activity of the UE–Messaging connector, which is used when the Universal Engine performs a failover from the Primary Server or a failback from the Secondary Server.

UE–OfferValidationLog

The UE–OfferValidationLog records the activity of the Offer Validation Connector.

UE–RemoteDataLog

The UE– RemoteDataLog records the receipt of remote data files and the date, time, IP address, mode and server, and logs any errors encountered.

UE–SanityCheckLog

The UE–SanityCheckLog is a daily store check in. It verifies local UE database contents against central (right groups, offers, records, etc.).

UE–SerialLog

The UE–SerialLog records the activity of the UE Serial Connector, which monitors the Universal Engine's Subordinate server to become in sync with the Primary Server.

UE–TransUpdateLog

The UE– TransUpdateLog records Transupload and Transdownload Connectors for UE locations.

WatchDog Agent Log

The WatchDog Agent Log records the activities of the Watchdog Agent, which monitors all agents running on the central server and, records agents that are not running during a certain period.

Appendix D: Web Service Files

Overview

Web service files are Active Server Method files (.asmx) that have one or more operations that usually emulate functionality in the Logix user interface. Logix also refers to these files as Connectors, which are categorized into either of the following:

- **External Connectors**—used to communicate only with the Logix application.
- **Internal Connectors**—used to communicate with promotion engines.

This appendix describes each Connector.

External Connectors

This section describes each External Connector.

Admin User Data

AdminUserData.asmx is a web service designed to provide information and execute functions related to Logix administrative user accounts:

- Get information about a user account
- Create a new user account
- Update an existing user account
- Delete a user account

AltID

Alternate ID can be managed via a web service, such as enrolling and updating an Alternate ID. It indicates whether an Alternate ID exists, should be created, or requested.

Buyer Role Data

BuyerRoleData.asmx is a web service designed to provide information and execute the following functions related to buyer roles:

- Get information about a buyer role
- Create a new buyer role
- Update an existing buyer role
- Delete a buyer role

Channel Connector

The channel connector provides data functions necessary to build a customer facing web site or kiosk allowing customers to view the offers that they are eligible for. This web service uses the following methods:

- Get Logon Identifier Types
- Logon
- Get Customer Details
- Get Number of Offers
- Get Offer List
- Get Channel Offer Details
- Opt-In to Offer
- Opt-Out of Offer
- Update Password
- Logout

Coupon Redemption Connector

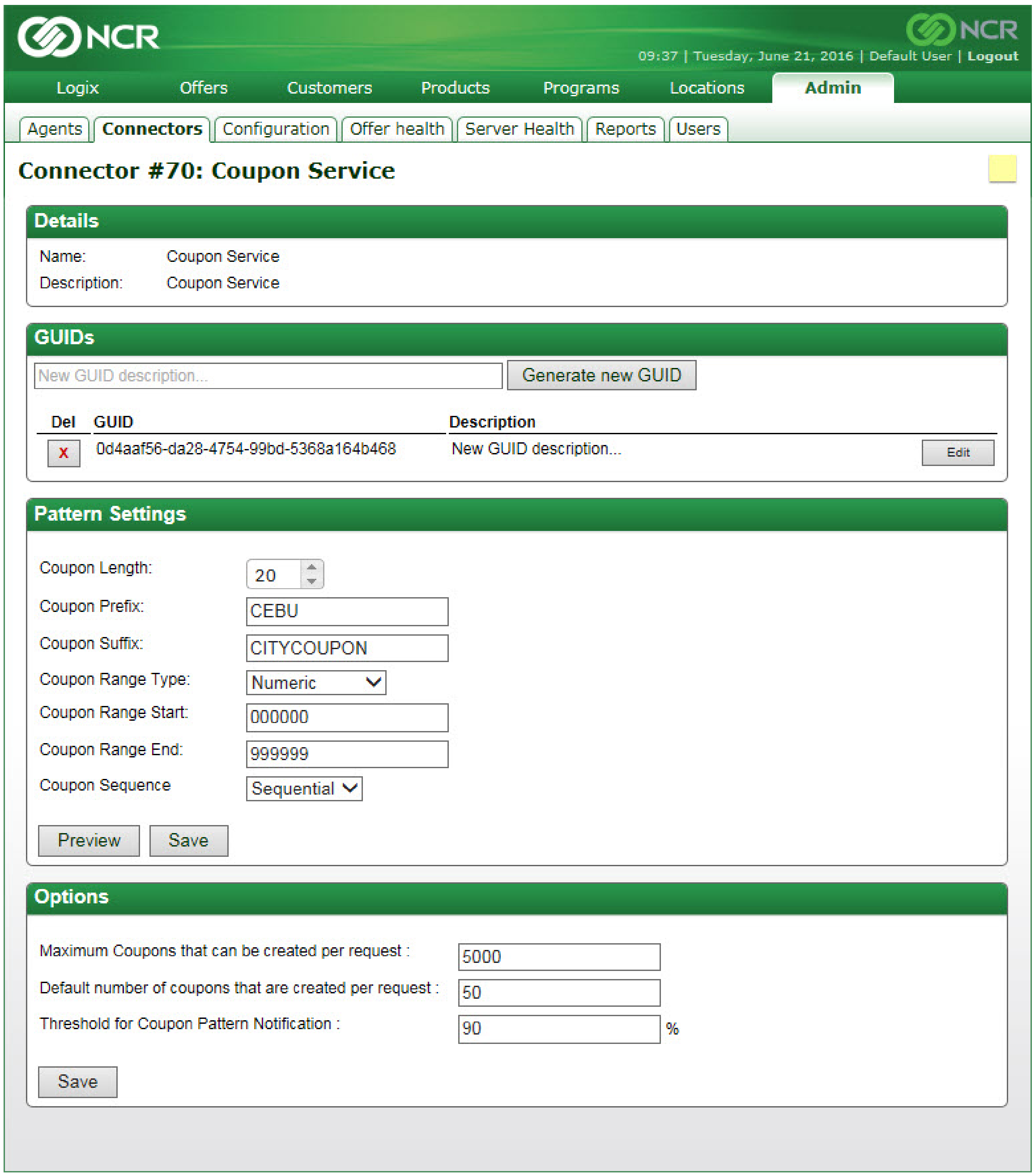
The Coupon Redemption Connector is a web service that enables retailers to access data on customer coupons or the redemption history of customer coupons.

Coupon Service

The Coupon Service is a web service that enables retailers to set and retrieve the coupon settings by calling the Coupon Service API.

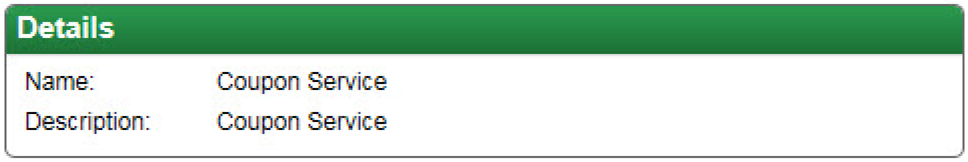
This service calls the Coupon Service API by referring to the Coupon Service URL that is set in the UE settings page. For more information, refer to *Coupon Service Option* on page 739.

Selecting **Admin→Connectors→Coupon Service** displays the Coupon Service page.



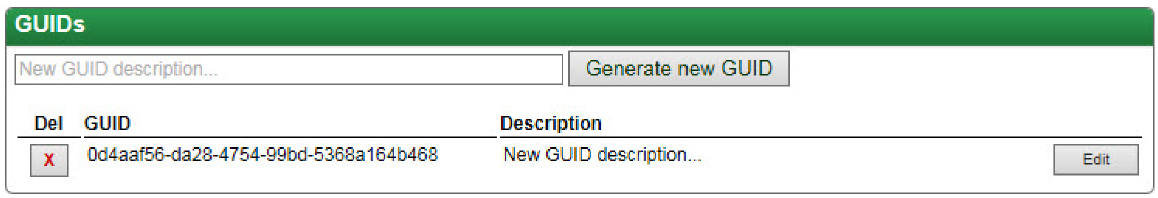
Details

The Details section of the page displays the Name and Description of the service.



Setting the GUID

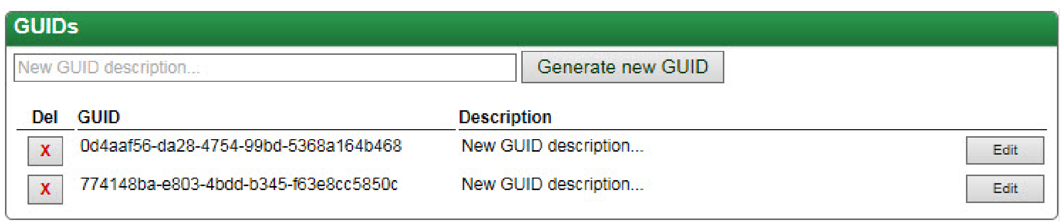
To call the Coupon Service API, this service needs a valid GUID.



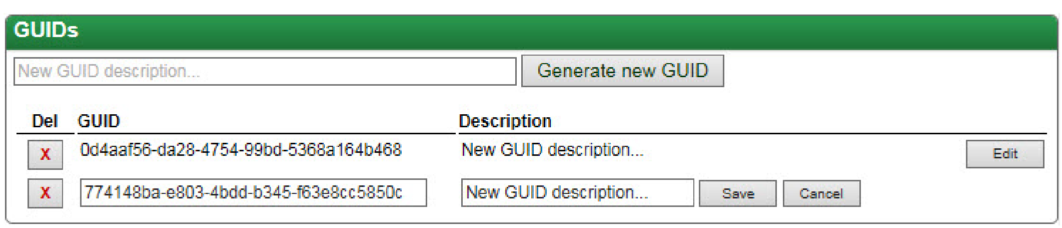
By default, after Logix is installed, the Coupon Service has an automatically–generated GUID. Retailers cannot access the pattern settings if there is no GUID generated for this service. Retailers can delete and generate another GUID.

To generate, edit, or delete a GUID, follow these steps:

1. In the GUIDs section, select **Generate new GUID**. The new GUID is displayed in the table.



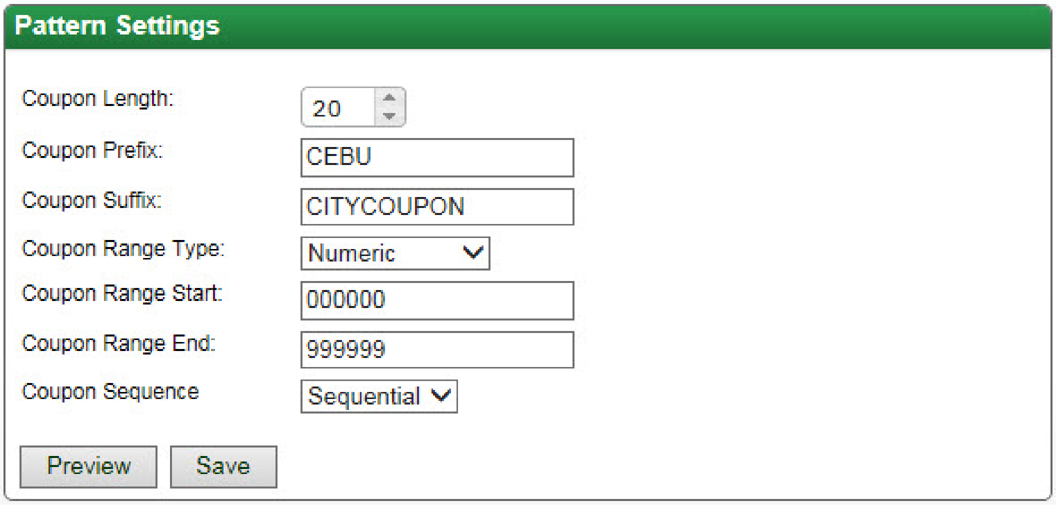
2. To edit the GUID, select **Edit**. The GUID and Description fields are enabled for editing, and the Save and Cancel buttons are displayed.



3. Modify the GUID and Description, and then select **Save**.
4. To delete the GUID, select the **X** button right next to the GUID.

Configuring the Pattern Settings

The Pattern Settings section of the page enables retailers to customize the pattern that is used to generate coupons.



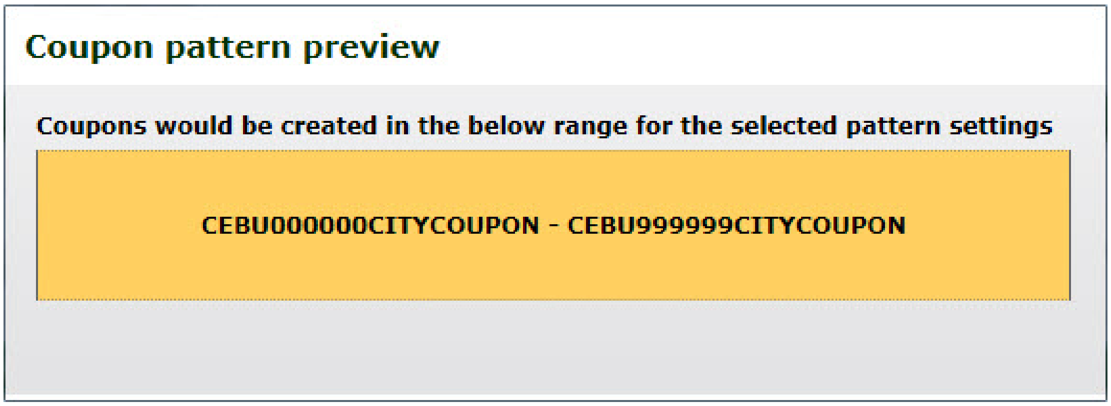
To configure the pattern settings, follow these steps:

1. In the Pattern Settings section, set the following settings:

Settings	Description
Coupon Length	Indicates the length of the coupon. The value can be up to a maximum of 20 alphanumeric characters, including the prefix and suffix.
Coupon Prefix	Indicates the first characters of the coupon. Valid characters are numbers (0–9) and uppercase letters (A–Z).
Coupon Suffix	Indicates the last characters of the coupon. Valid characters are numbers (0–9) and uppercase letters (A–Z).
Coupon Range Type	Indicates the type of the characters used for the coupons. The value can be one of the following: • Numeric—all numbers (0–9). • Alphanumeric—number and uppercase letters (0–9 and A–Z).
Coupon Range Start	(Optional) Indicates the start range of the coupons to be generated.
Coupon Range End	(Optional) Indicates the end range of the coupons to be generated.
Coupon Sequence	Indicates how the coupons are generated. The value can be one of the following:

Settings	Description
	• Random • Sequential

2. Select **Preview** to view the preview of the coupon when generated using the set pattern. The following window is displayed.



The Preview page displays the start and end range of the coupon pattern set.

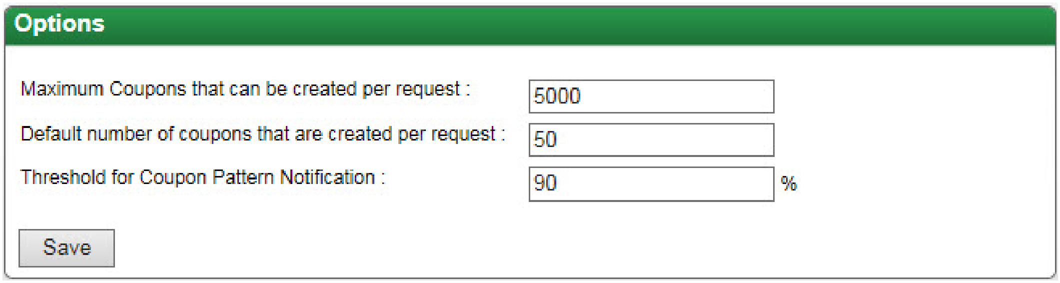
3. Close the window and then select **Save** to save the settings.

Note: After changing the coupon settings, it takes 1–2 minutes for the coupon service to start giving away coupons. Within this period, when a coupon is requested, the system displays a response to retry.

Setting the Coupon Options

The Options section of the page enables retailers to set the maximum number of coupons to be generated and the threshold for the coupon pattern notification.

Note: If the coupon pattern has only five coupons left, and a customer is eligible for six or more coupons, the system rewards only five coupons.



To set the coupon options, follow these steps:

1. In the Options section, set the following settings:

Settings	Description
Maximum Coupons that can be created per request	Indicates the maximum number of coupons to be generated for each request made by a POST Coupon Service API call. **Note:** This option restricts a client from overusing the Coupon Service, which may affect the performance of the Coupon Service API when called by other clients. **Example:** Retailer has an email marketing software that runs an email campaign that distributes coupons. If the option is set to 100 coupons, and the email marketing software requests 300 coupons, the Coupon Service rejects the request. A client can request only a maximum of 100 coupons at a time.
Default number of coupons that are created per request	Indicates the default number of coupons to be generated for each request made by the promotion engine, which involves a GET Coupon Service API call. **Note:** Retailers must configure this option to the maximum number of coupons that they would expect to give out in one transaction. If the option is set too low, the promotion engine makes multiple calls to the Coupon Service, which can affect the performance of the service. If the option is set too high, getting coupons in a sequence becomes inefficient. The promotion engine returns the unused coupons back to the service.

Settings	Description
	Example: The option is set to 20, and the offer is Buy one X, Get one Y coupon (multiple coupons single use). When the customer buys 30 pieces of X, at the end of the transaction, customer gets 30 pieces of Y coupons. The Coupon Service API is called twice: first for the 20 coupons, and the second for the 10 coupons, for a total of 30 coupons.
Threshold for Coupon Pattern Notification	Indicates the threshold limit for sending out the coupon pattern notification. If the threshold is reached, a notification is sent out. **Example:** The maximum number of coupons to be generated is 5000 and the threshold is set at 90%. If the total number of coupons generated so far is 4500, a notification is sent out to inform retailers. For more information about the coupon pattern notification, refer to *Setting Coupon Notifications* below.

2. Select **Save** to save the Options settings.

Setting Coupon Notifications

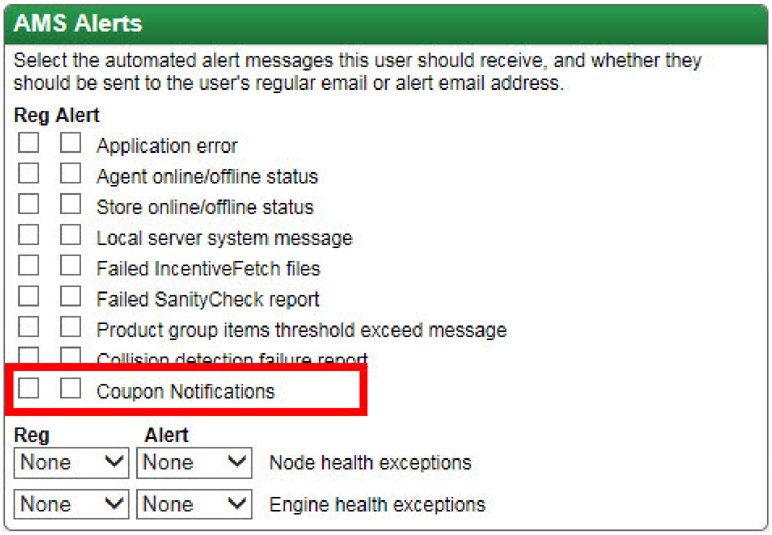
Retailers can subscribe to coupon notifications to receive email alerts when the following events occur:

- The coupon pattern is used up to the threshold limit set in the Options section.
- The coupon pattern is exhausted, which means the coupon pattern has been completely used up.

Note: Coupon notifications are intended for issues with the coupon service. These notifications do not necessarily involve a specific type of coupon.

To receive coupon notifications, subscribe to email alerts in the User Configuration page. For more information, refer to *Setting Email Alerts* on page 582.

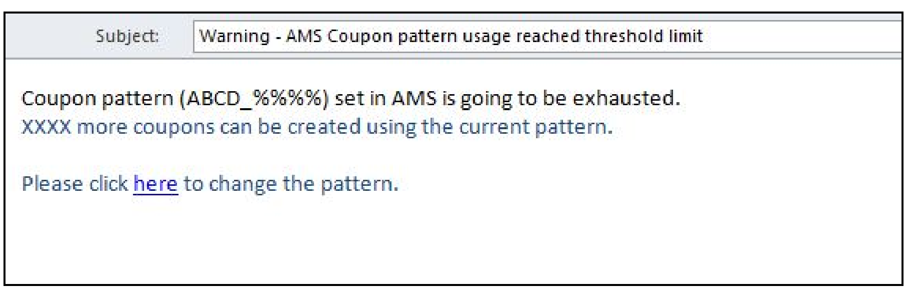
In the User Configuration page, check the **Coupon Notifications** check box in the AMS Alerts section.



When coupon notifications are sent, the email contains the following information:

- The current pattern in use.
- The number of coupons that can be still generated.
- A link that directs the user to the location where the coupon pattern can be modified.

Example: The following is the sample template that is used to send an email notification when the coupon pattern usage has reached the threshold limit.



CRMOfferConnector

CRMOfferConnector.asmx is a web service that enable offer creation, maintenance, and retrieval of offer data from outside the Logix user interface. An offer may be created in Logix and exported through the CRMOfferConnector to an external CRM source. An offer originally created in Logix may be re–imported, or a new offer may be created in Logix, from an external CRM source. Offers are imported and exported in a standard XML offer description format.

Cust Web Connector

CustWeb.asmx is a web service designed to provide information and execute functions related to the customer–facing website such as Customer Details, Membership Edit, Offer List, Update External Points, and Status Results.

Customer Data

CustomerData.asmx is a web service designed to provide general customer data changes made in Customer Inquiry within the Logix application.

- Get Logix Customer Updates (By Batch/Date)

Customer Inquiry

CustomerInquiry.asmx is a web service designed to provide information and execute functions related to customer inquiry.

- Get Point/Stored Value Balances
- Adjust Point/Stored Value Balances
- Get Points/Stored Value Adjust Report (By User/Customer)

Customer Update

CustomerUpdate.asmx is a web service designed to create and modify customer data within the Logix application.

Options

Option Name	Value	Settings
Copy reward distribution records when householding	Drop–down list	• Yes • No
Move all balances when dding customers to households	Drop–down list	• Yes • No
Move offers when adding customers to households	Drop–down list	• Yes • No
Move offers when removing customers from households	Drop–down list	• Yes • No
Move proportional balance when removing customers from households	Drop–down list	• Proportional for all offers • Do not transfer balances • Auto transferable offers only

Option Name	Value	Settings
Transferred balances can exceed reward limits	Drop–down list	• Yes • No
When delinking a customer from a household, make sure the airmile member ID is unset for the household	Drop–down list	• Yes • No
When linking a customer to a household, make sure the airmile member ID is set for the household	Drop–down list	• Yes • No
When setting (or unsetting) an airmile member ID, also set (or unset) it for the household	Drop–down list	• Yes • No

External Offer Connector

ExternalOfferConnector.asmx (EOC) is a web service that enables clients to add, update, and retrieve offer information similar to maintaining offers in the Logix user interface. The EOC is especially useful to allow third party entities (known in Logix as external sources) to run offers in a client's enterprise. It allows partners to create and maintain their offers while the client still retains offer approval and modification rights. External sources are defined in the Logix UI, which allows certain third parties to send offers to the EOC. The EOC uses the external source's credentials, supplied as parameters to the method call, to authenticate, and also determine how to handle the offer.

Options

Option Name	Value	Settings
Allow Item To Go Negative (Manufacturer Coupon)	Drop–down list	• Yes • No
Allow Item To Go Negative (Non–Manufacturer Coupon)	Drop–down list	• Yes • No
Default discount chargeback department code (basket–level)	Drop–down list	
Default discount chargeback department code (department–level)	Drop–down list	

Option Name	Value	Settings
Default discount chargeback department code (item–level)	Drop–down list	
Enable default receipt message for external offers	Drop–down list	• Yes • No
Flex Negative (Manufacturer Coupon)	Drop–down list	• Yes • No
Flex Negative (Non–Manufacturer Coupon)	Drop–down list	• Yes • No
Log received acceptance Offer XML	Drop–down list	• Yes • No
Log received rejection Offer XML	Drop–down list	• Yes • No
Timing of deployment for created offers	Drop–down list	• Immediate • Deferred
Timing of deployment for updated offers	Drop–down list	• Immediate • Deferred
UE Offer Priority (Non–Manufacturer Coupon)	Numeric value	

Issuance

Issuance.asmx is a web service that provides issuance data retrieval.

Kiosk Web Connector

KioskWeb.asmx is a web service that handles offer operations at a kiosk.

- Get Accumulation Balance
- Get Web Kiosk Targeted Items
- Get Web Kiosk Offers By Location Code
- Lookup by Alternate ID

Lightweight Directory Access Protocol (LDAP)

The Lightweight Directory Access Protocol (LDAP) is an application protocol for querying and modifying directory services running over TCP/IP. Logix can leverage an external LDAP server for user authentication of a user password. But, ensure that the user exists in Logix and LDAP is enabled for this to occur.

Note: Current validated LDAP servers are Sun ONE and OpenLDAP. Other servers should function provided they follow the standard LDAP API.

Logix Group Management Connector

The Logix Group Management (LGM) web service enables clients to do the following:

- Add, remove, and replace single and multiple Customer/ Product/ Location items to/ from the Customer/ Product/ Location Groups. (By External group Id and By Logix ID).
- Retrieve the information about the Customer/ Product/ Location groups. The group information contains the group name and the list of items in the group.

Points Update Connector

The web service is designed to receive a list of customers to adjust points in a specified program.

Stored Values Update Connector

The Stored Values Update Connector is a web service that receives a list of customers to adjust

Trackable Coupons

The Trackable Coupons Connector allows the engine to scan, redeem, query, and unlock trackable coupons used by a customer. This web service uses the following methods:

- Query Coupon
- Redeem Coupon
- Scan Coupon
- Unlock Coupon

Note: This web service is used to perform trackable coupon calls by promotion engines older than version 6.2. If using a promotion engine version 6.2, the Coupon Service must be installed to be used for trackable coupon calls. For more information about the Coupon Service, refer to *Coupon Service* on page 812. Installing the Coupon Service uses the AMS Brokers installer. For more information, refer to the *AMS Brokers Installation and Configuration Guide* (BCC5–0000–5097).

Universal Offer Connector

UniversalOfferConnector.asmx (UOC) is a web service that enables clients to retrieve offer information in a format that is based on the promotion engine type. The UOC is especially useful to allow third party entities (known in Logix as external interface IDs) to get offers to a client's enterprise. The UOC uses the external interfaces' credentials for the method call to determine the offers that the client gets. The credentials are used as parameters for the method call, which is authenticated by the Logix application.

User Management Connector

The User Management Connector is a web service that permits users to manage operations in the system such as adding, modifying, changing passwords, suspending, or restoring and reconciling.

Internal Connectors

This section describes each Internal Connector.

GetCustomerInfo

The GetCustomerInfo.aspx connector is used to request account information for customers whose data do not reside on a particular store level server. If the requested customer information does not reside on the Logix server, a new customer account is created.

Note: The GetCustomerInfo connector is only supported for offers using UE. It is also supported in Enterprise mode.

Reporting Upload

ReportingUpload.aspx retrieves and writes data to a file and inserts records to a Logix database. Data is collected in the standard manner for retrieval and storage.

Trans Download

The TransDownload Connector is used to send data resulting from the execution of offers on store level servers to cross shopping locations including data entered or updated at the host level.

UE Messaging Connector

The UE Messaging Connector is used when the UE performs a failover from the Primary Server or a failback from the Secondary Server.

UE Serial Connector

The UE Serial Connector is a maintenance mode serial that is called by the UE's Subordinate Server to be synced with the Primary Server.

Appendix E: Server Error Codes

Overview

This appendix describes errors that are associated with the central server and local server operations. Details on each error with user–submitted fixes and solutions are found in the Logix Knowledge Base. To access the Logix Knowledge Base, select a specific error to display the corresponding details.

Central Server Errors

The following table defines the errors associated with the central server:

Error ID	Failure Text
CS1	LastHeard error
CS2	IncentiveLastHeard error
CS3	TransactionLastHeard error
CS4	TransDownloadLastHeard error
CS5	Sanity Check failed

Local Server Errors

The following table defines the errors associated with the local server:

Error ID	Failure Text
LS1	Survey data not received
LS2	Unable to ping server
LS3	Unable to connect to server with SSH
LS4	Error encountered while processing survey data
LS5	Error encountered while analyzing survey results
LS11	CPU load average too high
LS12	Postgres not running
LS13	CPE not running
LS14	System rebooted recently
LS15	register_globals not enabled for `mod_php`
LS16	Postgres module not available for `mod_php`
LS17	PHP version not matching for `mod_php`
LS18	`register_argc_argv` not enabled for PHP client
LS19	Postgres module not available for PHP client
LS20	Sockets module not available for PHP client
LS21	PHP version not matching for PHP client
LS22	Unexpected `IncentiveFetchURL` for incentive file downloads
LS23	Unexpected `ImageFetchURL` for graphic downloads
LS27	Too many socket connections rejected
LS28	Number of socket connections seems excessive
LS29	Number of socket connections dropped seems excessive
LS30	Server is an acting primary and the socket is not connected
LS31	Copient code version not correct
LS32	Copient code build not correct
LS33	Unexpected value for TCP/IP integration protocol build
LS34	Unexpected value for TCP/IP integration protocol version
LS35	Unrecognized `conf/copient.conf` config file

Error ID	Failure Text
LS45	Unrecognized `conf/centralserverIP` config file
LS46	Unrecognized `conf/centralserverPath` config file
LS49	Unrecognized `conf/curl.conf` config file
LS51	Unrecognized `conf/www.conf` config file
LS55	Copient communications cache folder is filling up
LS59	Copient log folder is filling up
LS62	System `/tmp/folder` is filling up
LS65	PostgreSQL database folder is filling up
LS68	System /partition is filling up
LS70	Database maintenance Tidy has not been run recently
LS71	Average vacuum time exceeds maximum vacuum time
LS72	Too many transactions offline due to IPL conditions
LS73	Too many transaction timeout flags sent from POS
LS79	Socket handler encountered Fatal PHP errors
LS82	The CPE encountered Fatal PHP errors
LS85	The CPE encountered Fatal PHP errors
LS88	Query errors found in CPE log
LS91	Query errors found in socket handler Log
LS94	Query errors found in CPE queue handler log
LS97	PHP errors encountered in ipLog
LS100	PHP errors encountered in CPE queue handler log
LS103	PHP errors encountered in CPE log
LS106	`incentiveFetch` mass insert error in communications log
LS109	`transDownload` mass insert error in communications log
LS112	`autoIPL` mass insert error in communications log
LS115	transUpload general error
LS118	reportingUpload general error
LS121	IPL Required: transDownload irreparable error
LS124	IPL Required: incentiveFetch irreparable error

Error ID	Failure Text
LS127	IPL Runaway detected: Logix sending runaway throttle to server
LS128	Bad owner UID for `conf/copient.conf` config file
LS129	Bad owner GUID for `conf/copient.conf` config file
LS130	Bad permissions for `conf/copient.conf` config file
LS131	Bad owner UID for `conf/centralserverIP` config file
LS132	Bad owner GUID for `conf/centralserverIP` config file
LS133	Bad permissions for `conf/centralserverIP` config file
LS134	Bad owner UID for `conf/centralserverPath` config file
LS135	Bad owner GUID for `conf/centralserverPath` config file
LS136	Bad permissions for `conf/centralserverPath` config file
LS137	Bad owner UID for `conf/curl.conf` config file
LS138	Bad owner GUID for `conf/curl.conf` config file
LS139	Bad permissions for `conf/curl.conf` config file
LS140	Bad owner UID for `conf/www.conf` config file
LS141	Bad owner GUID for `conf/www.conf` config file
LS142	Bad permissions for `conf/www.conf` config file
LS144	Unrecognized `bin/autoIP file md5sum`
LS145	Bad owner UID for `bin/autoIPL` file
LS146	Bad owner GUID for `bin/autoIPL` file
LS147	Bad permissions for `bin/autoIPL` file
LS149	Unrecognized `bin/serial` file md5sum
LS150	Bad owner UID for `bin/serial` file
LS151	Bad owner GUID for `bin/serial` file
LS152	Bad permissions for `bin/serial` file
LS154	Unrecognized `bin/getGlobal` file md5sum
LS155	Bad owner UID for `bin/getGlobal` file
LS156	Bad owner GUID for `bin/getGlobal` file
LS157	Bad permissions for `bin/getGlobal` file
LS159	Unrecognized `bin/staggerJobs` file md5sum

Error ID	Failure Text
LS160	Bad owner UID for `bin/staggerJobs` file
LS161	Bad owner GUID for `bin/staggerJobs` file
LS162	Bad permissions for `bin/staggerJobs` file
LS164	Unrecognized `bin/tidy` file md5sum
LS165	Bad owner UID for `bin/tidy` file
LS166	Bad owner GUID for `bin/tidy` file
LS167	Bad permissions for `bin/tidy` file
LS169	Unrecognized `bin/vacNuke` file md5sum
LS170	Bad owner UID for `bin/vacNuke` file
LS171	Bad owner GUID for `bin/vacNuke` file
LS172	Bad permissions for `bin/vacNuke` file
LS174	Unrecognized `www/ClearDisplay.php` file md5sum
LS175	Bad owner UID for `www/ClearDisplay.php` file
LS176	Bad owner GUID for `www/ClearDisplay.php` file
LS177	Bad permissions for `www/ClearDisplay.php` file
LS179	Unrecognized `www/deliverables.php` file md5sum
LS180	Bad owner UID for `www/deliverables.php` file
LS181	Bad owner GUID for `www/deliverables.php` file
LS182	Bad permissions for `www/deliverables.php` file
LS184	Unrecognized `www/fuel.php` file md5sum
LS185	Bad owner UID for `www/fuel.php` file
LS186	Bad owner GUID for www/fuel.php file
LS187	Bad permissions for www/fuel.php file
LS189	Unrecognized www/ipLogView.php file md5sum
LS190	Bad owner UID for www/ipLogView.php file
LS191	Bad owner GUID for www/ipLogView.php file
LS192	Bad permissions for www/ipLogView.php file
LS194	Unrecognized www/lanetype.php file md5sum
LS195	Bad owner UID for www/lanetype.php file

Error ID	Failure Text
LS196	Bad owner GUID for www/lanetype.php file
LS197	Bad permissions for www/lanetype.php file
LS199	Unrecognized www/lsconfig.php file md5sum
LS200	Bad owner UID for www/lsconfig.php file
LS201	Bad owner GUID for www/lsconfig.php file
LS202	Bad permissions for www/lsconfig.php file
LS204	Unrecognized www/onscreenad.php file md5sum
LS205	Bad owner UID for www/onscreenad.php file
LS206	Bad owner GUID for www/onscreenad.php file
LS207	Bad permissions for www/onscreenad.php file
LS209	Unrecognized www/phaseA.php file md5sum
LS210	Bad owner UID for www/phaseA.php file
LS211	Bad owner GUID for www/phaseA.php file
LS212	Bad permissions for www/phaseA.php file
LS214	Unrecognized www/PromoDebug.php file md5sum
LS215	Bad owner UID for www/PromoDebug.php file
LS216	Bad owner GUID for www/PromoDebug.php file
LS217	Bad permissions for www/PromoDebug.php file
LS219	Unrecognized www/scan.php file md5sum
LS220	Bad owner UID for www/scan.php file
LS221	Bad owner GUID for www/scan.php file
LS222	Bad permissions for www/scan.php file
LS224	Unrecognized www/viewpromos.php file md5sum
LS225	Bad owner UID for www/viewpromos.php file
LS226	Bad owner GUID for www/viewpromos.php file
LS227	Bad permissions for www/viewpromos.php file
LS229	Unrecognized www/watchdog.php file md5sum
LS230	Bad owner UID for www/watchdog.php file
LS231	Bad owner GUID for www/watchdog.php file

Error ID	Failure Text
LS232	Bad permissions for www/watchdog.php file
LS234	Unrecognized www/ybDisplay.php file md5sum
LS235	Bad owner UID for www/ybDisplay.php file
LS236	Bad owner GUID for www/ybDisplay.php file
LS237	Bad permissions for www/ybDisplay.php file
LS239	Unrecognized www/yellowbox-xp.exe file md5sum
LS240	Bad owner UID for www/yellowbox-xp.exe file
LS241	Bad owner GUID for www/yellowbox-xp.exe file
LS242	Bad permissions for www/yellowbox-xp.exe file
LS244	Unrecognized apps/com/communications.inc file md5sum
LS245	Bad owner UID for apps/com/communications.inc file
LS246	Bad owner GUID for apps/com/communications.inc file
LS247	Bad permissions for apps/com/communications.inc file
LS249	Unrecognized apps/com/fetchData file md5sum
LS250	Bad owner UID for apps/com/fetchData file
LS251	Bad owner GUID for apps/com/fetchData file
LS252	Bad permissions for apps/com/fetchData file
LS254	Unrecognized apps/com/getAlternateIDInfo file md5sum
LS255	Bad owner UID for apps/com/getAlternateIDInfo file
LS256	Bad owner GUID for apps/com/getAlternateIDInfo file
LS257	Bad permissions for apps/com/getAlternateIDInfo file
LS259	Unrecognized apps/com/getCardholderInfo file md5sum
LS260	Bad owner UID for apps/com/getCardholderInfo file
LS261	Bad owner GUID for apps/com/getCardholderInfo file
LS262	Bad permissions for apps/com/getCardholderInfo file
LS264	Unrecognized apps/com/incentiveFetch file md5sum
LS265	Bad owner UID for apps/com/incentiveFetch file
LS266	Bad owner GUID for apps/com/incentiveFetch file
LS267	Bad permissions for apps/com/incentiveFetch file

Error ID	Failure Text
LS269	Unrecognized apps/com/massInsert file md5sum
LS270	Bad owner UID for apps/com/massInsert file
LS271	Bad owner GUID for apps/com/massInsert file
LS272	Bad permissions for apps/com/massInsert file
LS274	Unrecognized apps/com/moveData file md5sum
LS275	Bad owner UID for apps/com/moveData file
LS276	Bad owner GUID for apps/com/moveData file
LS277	Bad permissions for apps/com/moveData file
LS279	Unrecognized apps/com/moveDataResponse file md5sum
LS280	Bad owner UID for apps/com/moveDataResponse file
LS281	Bad owner GUID for apps/com/moveDataResponse file
LS282	Bad permissions for apps/com/moveDataResponse file
LS284	Unrecognized apps/com/offerValidation.php file md5sum
LS285	Bad owner UID for apps/com/offerValidation.php file
LS286	Bad owner GUID for apps/com/offerValidation.php file
LS287	Bad permissions for apps/com/offerValidation.php file
LS289	Unrecognized apps/com/PhoneHome.inc file md5sum
LS290	Bad owner UID for apps/com/PhoneHome.inc file
LS291	Bad owner GUID for apps/com/PhoneHome.inc file
LS292	Bad permissions for apps/com/PhoneHome.inc file
LS294	Unrecognized apps/com/reportingUpload.php file md5sum
LS295	Bad owner UID for apps/com/reportingUpload.php file
LS296	Bad owner GUID for apps/com/reportingUpload.php file
LS297	Bad permissions for apps/com/reportingUpload.php file
LS299	Unrecognized apps/com/sanityCheck.php file md5sum
LS300	Bad owner UID for apps/com/sanityCheck.php file
LS301	Bad owner GUID for apps/com/sanityCheck.php file
LS302	Bad permissions for apps/com/sanityCheck.php file
LS304	Unrecognized apps/com/SanityTables.inc file md5sum

Error ID	Failure Text
LS305	Bad owner UID for apps/com/SanityTables.inc file
LS306	Bad owner GUID for apps/com/SanityTables.inc file
LS307	Bad permissions for apps/com/SanityTables.inc file
LS309	Unrecognized apps/com/signal.inc file md5sum
LS310	Bad owner UID for apps/com/signal.inc file
LS311	Bad owner GUID for apps/com/signal.inc file
LS312	Bad permissions for apps/com/signal.inc file
LS314	Unrecognized apps/com/transDownload file md5sum
LS315	Bad owner UID for apps/com/transDownload file
LS316	Bad owner GUID for apps/com/transDownload file
LS317	Bad permissions for apps/com/transDownload file
LS319	Unrecognized apps/com/transUpload file md5sum
LS320	Bad owner UID for apps/com/transUpload file
LS321	Bad owner GUID for apps/com/transUpload file
LS322	Bad permissions for apps/com/transUpload file
LS324	Unrecognized apps/common/ConfigFunctions.inc file md5sum
LS325	Bad owner UID for apps/common/ConfigFunctions.inc file
LS326	Bad owner GUID for apps/common/ConfigFunctions.inc file
LS327	Bad permissions for apps/common/ConfigFunctions.inc file
LS329	Unrecognized apps/common/logging.inc file md5sum
LS330	Bad owner UID for apps/common/logging.inc file
LS331	Bad owner GUID for apps/common/logging.inc file
LS332	Bad permissions for apps/common/logging.inc file
LS334	Unrecognized apps/ipconnect/fetchOffline.php file md5sum
LS335	Bad owner UID for apps/ipconnect/fetchOffline.php file
LS336	Bad owner GUID for apps/ipconnect/fetchOffline.php file
LS337	Bad permissions for apps/ipconnect/fetchOffline.php file
LS339	Unrecognized apps/ipconnect/IntegrationSocket.inc file md5sum
LS340	Bad owner UID for apps/ipconnect/IntegrationSocket.inc file

Error ID	Failure Text
LS341	Bad owner GUID for apps/ipconnect/IntegrationSocket.inc file
LS342	Bad permissions for apps/ipconnect/IntegrationSocket.inc file
LS344	Unrecognized apps/ipconnect/interface.php file md5sum
LS345	Bad owner UID for apps/ipconnect/interface.php file
LS346	Bad owner GUID for apps/ipconnect/interface.php file
LS347	Bad permissions for apps/ipconnect/interface.php file
LS349	Unrecognized apps/ipconnect/ipconnect.php file md5sum
LS350	Bad owner UID for apps/ipconnect/ipconnect.php file
LS351	Bad owner GUID for apps/ipconnect/ipconnect.php file
LS352	Bad permissions for apps/ipconnect/ipconnect.php file
LS354	Unrecognized apps/ipconnect/iplogging.inc file md5sum
LS355	Bad owner UID for apps/ipconnect/iplogging.inc file
LS356	Bad owner GUID for apps/ipconnect/iplogging.inc file
LS357	Bad permissions for apps/ipconnect/iplogging.inc file
LS359	Unrecognized apps/ipconnect/msg995 file md5sum
LS360	Bad owner UID for apps/ipconnect/msg995 file
LS361	Bad owner GUID for apps/ipconnect/msg995 file
LS362	Bad permissions for apps/ipconnect/msg995 file
LS364	Unrecognized apps/ipconnect/offline.php file md5sum
LS365	Bad owner UID for apps/ipconnect/offline.php file
LS366	Bad owner GUID for apps/ipconnect/offline.php file
LS367	Bad permissions for apps/ipconnect/offline.php file
LS369	Unrecognized apps/promoengine/cardfilters.inc file md5sum
LS370	Bad owner UID for apps/promoengine/cardfilters.inc file
LS371	Bad owner GUID for apps/promoengine/cardfilters.inc file
LS372	Bad permissions for apps/promoengine/cardfilters.inc file
LS374	Unrecognized apps/promoengine/common.inc file md5sum
LS375	Bad owner UID for apps/promoengine/common.inc file
LS376	Bad owner GUID for apps/promoengine/common.inc file

Error ID	Failure Text
LS377	Bad permissions for apps/promoengine/common.inc file
LS379	Unrecognized apps/promoengine/discounting.inc file md5sum
LS380	Bad owner UID for apps/promoengine/discounting.inc file
LS381	Bad owner GUID for apps/promoengine/discounting.inc file
LS382	Bad permissions for apps/promoengine/discounting.inc file
LS384	Unrecognized apps/promoengine/DisplayRoutines.inc file md5sum
LS385	Bad owner UID for apps/promoengine/DisplayRoutines.inc file
LS386	Bad owner GUID for apps/promoengine/DisplayRoutines.inc file
LS387	Bad permissions for apps/promoengine/DisplayRoutines.inc file
LS389	Unrecognized apps/promoengine/EOS.inc file md5sum
LS390	Bad owner UID for apps/promoengine/EOS.inc file
LS391	Bad owner GUID for apps/promoengine/EOS.inc file
LS392	Bad permissions for apps/promoengine/EOS.inc file
LS394	Unrecognized apps/promoengine/interface.inc file md5sum
LS395	Bad owner UID for apps/promoengine/interface.inc file
LS396	Bad owner GUID for apps/promoengine/interface.inc file
LS397	Bad permissions for apps/promoengine/interface.inc file
LS399	Unrecognized apps/promoengine/kiosk.inc file md5sum
LS400	Bad owner UID for apps/promoengine/kiosk.inc file
LS401	Bad owner GUID for apps/promoengine/kiosk.inc file
LS402	Bad permissions for apps/promoengine/kiosk.inc file
LS404	Unrecognized apps/promoengine/MessageID.inc file md5sum
LS405	Bad owner UID for apps/promoengine/MessageID.inc file
LS406	Bad owner GUID for apps/promoengine/MessageID.inc file
LS407	Bad permissions for apps/promoengine/MessageID.inc file
LS409	Unrecognized apps/promoengine/printing.inc file md5sum
LS410	Bad owner UID for apps/promoengine/printing.inc file
LS411	Bad owner GUID for apps/promoengine/printing.inc file
LS412	Bad permissions for apps/promoengine/printing.inc file

Error ID	Failure Text
LS414	Unrecognized apps/promoengine/PromoDebugRoutines.inc file md5sum
LS415	Bad owner UID for apps/promoengine/PromoDebugRoutines.inc file
LS416	Bad owner GUID for apps/promoengine/PromoDebugRoutines.inc file
LS417	Bad permissions for apps/promoengine/PromoDebugRoutines.inc file
LS419	Unrecognized apps/promoengine/promoengine.inc file md5sum
LS420	Bad owner UID for apps/promoengine/promoengine.inc file
LS421	Bad owner GUID for apps/promoengine/promoengine.inc file
LS422	Bad permissions for `apps/promoengine/promoengine.inc` file
LS424	Unrecognized `apps/promoengine/svexternalid.inc` file md5sum
LS425	Bad owner UID for `apps/promoengine/svexternalid.inc` file
LS426	Bad owner GUID for `apps/promoengine/svexternalid.inc` file
LS427	Bad permissions for `apps/promoengine/svexternalid.inc` file
LS429	Unrecognized `apps/promoengine/void.inc` file md5sum
LS430	Bad owner UID for `apps/promoengine/void.inc` file
LS431	Bad owner GUID for `apps/promoengine/void.inc` file
LS432	Bad permissions for `apps/promoengine/void.inc` file
LS434	Bad owner UID for `logs/ipLog` file
LS435	Bad owner GUID for `logs/ipLog` file
LS436	Bad permissions for `logs/ipLog` file
LS438	Bad owner UID for `logs/comLog` file
LS439	Bad owner GUID for `logs/comLog` file
LS440	Bad permissions for `logs/comLog` file
LS442	Bad owner UID for `logs/scanLog` file
LS443	Bad owner GUID for `logs/scanLog` file
LS444	Bad permissions for `logs/scanLog` file
LS446	Bad owner UID for `logs/yellowboxSync` file
LS447	Bad owner GUID for `logs/yellowboxSync` file
LS448	Bad permissions for `logs/yellowboxSync` file

Error ID	Failure Text
LS450	Bad owner UID for `logs/surveyLog` file
LS451	Bad owner GUID for `logs/surveyLog` file
LS452	Bad permissions for `logs/surveyLog` file
LS453	Cannot connect to Postgres
LS454	SSH daemon not found in process list on server

Appendix F: Permissions

Overview

With the exception of administrative users, most users have access to certain areas of Logix but not to others. To enforce this kind of access control, Logix uses ***permissions***, each one of which grants access to one particular part of Logix — a page, a control, and so forth. Any user who possesses that permission can use that functionality.

Example: A customer service representative has access to customer inquiry but not to the offer builder; or someone authorized to create offers is not allowed to modify system settings.

Permission Categories

Logix permissions are grouped into the following categories:

Category	Description
Administration	Controls access to parts of the Logix UI that deal principally with system configuration and management.
Banners	Controls access to banners.
Buyers	Controls access to buyers.
Channels	Controls access to channel information.
Customers	Controls access to customer groups and to individual customer records.
Locations	Controls access to the stores or servers, and store groups.
Offers	Controls access to the Logix offer builder.
Products	Controls access to product groups and to the product inquiry pages.
Programs	Controls access to points programs and stored value programs.

To configure permissions, refer to *Configuring Role Permissions* on page 567.

Permission Levels

Certain permissions are logically dependent on others. Refer to the following table for a description of permission levels in each category:

Permission Level	Description
Primary permission	Enables the full function of a secondary permission.
Secondary permission	Requires a primary permission.
Dependent permission	Depends on a secondary permission.

Example: The "edit stores" permission requires the "access stores" permission to access and edit a store.

For more information, refer to *Configuring Role Permissions* on page 567.

Administration

Administrative permissions govern those parts of the Logix UI that deal principally with system configuration and management. This section describes each administrative permission.

Access configuration

This permission allows users to view (but not create, edit, or delete) items within the Configuration page, which contains pages governing attributes, categories, data exports, departments, external sources, manual adjustment UPCs, product and store hierarchies, roles, scorecards, trigger codes, tender types, terminals, vendors, and system settings.

Secondary Permission	Description	Dependent Permissions
Access external sources	Views (but not modify) external sources.	• Create external sources—creates external sources. • Delete external sources—deletes external sources. • Edit external sources—edits external sources.
Access system health	Views a list of AMS agents and their frequency, and run times; and permits users to edit individual settings of each agent.	
Access system settings	Views and modifies all system settings, including general settings, engine–specific settings, and health settings.	
Delete from hierarchy	Removes items or nodes from product or store hierarchies.	
Edit attributes	Creates, edits, and deletes offer attributes.	
Edit categories	Creates, edits, and deletes offer categories.	
Edit departments	Creates, edits, and deletes offer chargeback departments.	
Edit product hierarchies	Creates, edits, and deletes product hierarchies. **Note:** This permission is currently unused and deprecated.	
Edit roles	Creates, edits, and deletes user roles.	

Access configuration

This permission allows users to view (but not create, edit, or delete) items within the Configuration page, which contains pages governing attributes, categories, data exports, departments, external sources, manual adjustment UPCs, product and store hierarchies, roles, scorecards, trigger codes, tender types, terminals, vendors, and system settings.

Secondary Permission	Description	Dependent Permissions
Edit store hierarchies	Creates, edits, and deletes store hierarchies. **Note:** This permission is currently unused and deprecated.	
Edit tender types	Creates, edits, and deletes tender types.	
Edit terminals	Creates, edits, and deletes terminal types.	

Access connectors

This permission allows users to view (but not modify) records for AMS connectors, which in this case are those records in the Connectors table marked as both installed and visible.

Secondary Permission	Description	Dependent Permissions
Edit connectors	Creates, edits, and deletes GUIDs for any connector that uses GUIDs.	

Access Customer Languages

This permission allows users to assign default languages to administrative users when a new account is created, and default customer facing website if multi–language is enabled at the system option level (applies if Enterprise Preference Manager – EPM — is installed).

Access folders

This permission allows users to view (but not modify) folders, which currently consist of hierarchical groupings of offers. Folders are accessible under the Offers tab.

Secondary Permission	Description	Dependent Permissions
Create folders	Creates new folders.	
Delete folders	Deletes existing folders.	
Edit folders	Renames folders or modify the contents of folders.	

Access history

This permission allows users to view all activity history, which are accessible from the History sub–page tabs that accompany most major edit pages in Logix.

Access instant win reports

This permission allows users to view a summary of enterprise instant win conditions and their associated triggers. This summary is accessible from the Reports page under the Admin tab.

Access logs

This permission allows users to see all the log files generated by AMS, its agents, connectors, and so forth.

Access notes

This permission allows users to view (but not modify) notes. Notes are bits of information attached to specific pages in the Logix UI, created by selecting the yellow stick–note icon at the upper–right corner of those pages.

Secondary Permission	Description	Dependent Permissions
Create notes	Creates new notes.	
Delete notes	Deletes existing notes.	

Access offer health

This permission allows users to view a summary of health–related data for offers, including warnings, invalid components, last validation times, and so forth; and re–validates offers on demand.

Access other users' info

This permission allows users to view (but not modify) the personal settings of other users.

Secondary Permission	Description	Dependent Permissions
Edit other users	Edits the personal settings of other users (name, contact info, roles, and so forth).	

Access reports

This permission allows users to view and download reports of impressions, redemptions, and markdowns for any offer over a specified period.

Access server health

This permission allows users to view a summary of server–related health issues.

Access server health resolutions

This permission allows users to view (but not modify) a knowledge base of resolution procedures for various known server health issues.

Secondary Permission	Description	Dependent Permissions
Create server health resolutions	Creates a new entry in the knowledge base.	
Delete server health resolutions	Deletes an entry from the knowledge base.	
Edit server health resolutions	Edits existing entries in the knowledge base.	

Access store health

This permission allows users to view a summary of store–related health issues, including known errors per location; and enable or disable reports and alerts per location.

Access store health resolutions

This permission allows users to view a knowledge base of resolution procedures for various known store health issues.

Secondary Permission	Description	Dependent Permissions
Create store health resolutions	Creates a new entry in the knowledge base.	
Delete store health resolutions	Deletes an entry from the knowledge base.	
Edit store health resolutions	Edits existing entries in the knowledge base.	

Access Units of Measure

This permission allows users to assign units of measure types such as weight and volume, and specify the number of decimal places used for each type.

Access user defined fields

This permission allows users to view (but not modify) user defined fields in an offer. User defined fields can have a specific datatype defined by the user and are only used in the Logix user interface. They can also be imported and exported with offers through the CRM and External Offer Connectors as well as exported through the Universal Offer Connector.

Secondary Permission	Description	Dependent Permissions
Add user defined fields	Creates a new user defined field for an offer in the user interface.	
Delete user defined fields	Deletes a user defined field from the user interface.	
Edit user defined fields	Edits existing user defined fields in the user interface.	

Assign offers to folders

This permission allows users to move existing offers into folders within the user interface.

Create users

This permission allows users to create new user accounts and edit all user information including users that were not initially created by the end user.

Delete users

This permission allows users to delete existing user accounts.

Edit data exports

This permission allows users to edit data export options, such as the Stored Value Export and Stored Value Earnings/Adjustments settings.

Edit departments

This permission allows users to create, edit, and delete offer chargeback departments.

Edit mutual exclusion groups

This permission allows users to add, remove, or modify mutual exclusion groups within the user interface. Mutual exclusion groups allow exclusion rules to be set up around an offer. There are two types of mutual exclusion groups, offer level and item level. In offer level, only the offer with the highest priority will be given or earned in the transaction. In item level, if an item in a transaction qualifies for multiple offers that are part of the group, only the offer with the highest priority will be earned.

Edit own roles

This permission allows users to add or remove roles to or from the current user's own account.

Edit own user info

This permission allows users to edit their personal settings, including identity, contact information, alerts, and so forth; but excluding roles.

Edit Reason Codes

This permission allows users to edit reason codes, which applies to points, stored value, or both.

Edit Trigger Code Messages

This permission allows users to edit unused trigger code messages.

Edit system options

This permission allows users to modify the Settings information in the Admin Configuration page.

View hidden system options

This permission allows users to view the system options that are marked as hidden in the system.

Banners

Banner permissions relate to banners, which in AMS is considered a sub–set of an enterprise's stores that operate under a specific name. This section describes each Banner permission.

Access banners

This permission allows users to view (but not modify) existing store banners.

Secondary Permission	Description	Dependent Permissions
Add users to banners	Grants any user access to a banner.	
Remove users from banners	Denies any user access to a banner.	
Create banners	Creates a new banner.	
Delete banners	Deletes an existing banner.	
Edit banners	Modifies the banner's name, code, description, and so forth.	
Edit banner chargeback department	Modifies the chargeback department associated with the banner.	
Edit banner product hierarchy	Modifies the product hierarchy associated with the banner.	
Edit banner store hierarchy	Modifies the store hierarchy associated with the banner.	

Buyers

Buyer permissions relate to buyers. These permissions control the buyer roles, product groups, and offers. This section describes each Buyer permission.

Access buyers

This permission allows users to view (but not modify) existing buyers.

Secondary Permission	Description	Dependent Permissions
Edit Buyer Roles	Denies current user to change own settings or another buyer settings.	
Edit Offers regardless of Buyer association	Denies changes made to offers that are not linked to the buyer.	
Edit product groups regardless of Buyer association	Denies changes made to product group information that is not linked to the buyer.	
View buyer roles	Hides current user role and and other Buyer Roles.	
View offers regardless of Buyer association	Hides offers from a buyer if they are linked with another buyer.	
View product groups regardless of Buyer association	Hides product groups from buyer if the offers are associated with another buyer.	

Channels

Channels permissions relate to communication channels, which in AMS are ways through which the retailers inform consumers of store promotions. Examples of channels include kiosks, Point–of–Sale (POS) systems, and the retailer's website. This section describes each Channels permission.

Access Channel: Kiosk

This permission allows users to view (but not modify) the Kiosk channel information in the Offer Channels page.

Secondary Permission	Description	Dependent Permissions
Edit Channel: Kiosk	Modifies the Kiosk channel information such as the Start Date, End Date, Kiosk offer description, & Kiosk offer graphic in the Offer Channels page.	

Access Channel: POS

This permission allows users to view (but not modify) the POS channel information in the Offer Channels page.

Secondary Permission	Description	Dependent Permissions
Edit Channel: POS	Modifies the POS channel information such as the Start Date, End Date, Frequency, Printer Message, and Cashier Message in the Offer Channels page.	

Access Channel: Retailer Website

This permission allows users to view (but not modify) the Retailer Website channel information in the Offer Channels page.

Secondary Permission	Description	Dependent Permissions
Edit Channel: Retailer Website	Modifies the Retailer Website channel information such as the Start Date, End Date, Website offer description, and Website offer graphic in the Offer Channels page.	

Customers

Customer permissions control access to customer groups and to individual customer records. This section describes each Customer permission.

Note: Certain permissions are applicable only to CAM or US Airmiles promotion engines.

Access customer groups

This permission allows users to view (but not modify) customer groups.

Secondary Permission	Description	Dependent Permissions
Create customer groups	Creates a new group.	
Edit customer groups	Modifies customer group details such as name, group members, and so forth.	
Delete customer groups	Deletes an existing group.	

Access customer inquiry

This permission grants users to access the Customer Inquiry page and permits users to conduct an inquiry and search customer records.

Secondary Permission	Description	Dependent Permissions
Access adjustments page	Views (but not adjust) points balances and stored value.	
Access customer identity data: [Field]	These field–level permissions control whether the specific customer identity field is displayed to the user. **Example:** first name, street address, ZIP codes, and so forth	• Edit customer identity data—edits any customer identity data accessible to the user.
Access customer inquiry reporting	Generates and downloads reports of customer inquiry activity based on user, customer, date range, and various other criteria. If selected, it enables the Report button in the Customer Inquiry page.	
Access customer notes	Views (but not add) notes about the customer. The Notes function is displayed on the Customer General page.	• Add customer notes—creates notes about the customer through the notes pop–up launched from the Customer General page.

Access customer inquiry

This permission grants users to access the Customer Inquiry page and permits users to conduct an inquiry and search customer records.

Secondary Permission	Description	Dependent Permissions
Access customer offers	Views the list of offers in which the customer is a participant.	• Access redemption history—views recent transactions in which the customer has redeemed the offer. This data is accessible through the ellipsis button on the Customer Offers page. The button is disabled if the permission is disabled. • Add customer to offer—adds the customer to the customer group used by the specified offer, which will result in the customer being added to one or more offers. Adding the customer is done through the button on the Customer Offers page. The button does not appear if the permission is disabled. • Delete customer from offer—removes the customer from the customer group used by the specified offer, which will result in the customer being removed from one or more offers. Deleting the customer is done through the “X” button on the Customer Offers page. The button is disabled if the permission is disabled.
Access household cardholder	Views the cardholder members in the selected household.	

Access customer inquiry

This permission grants users to access the Customer Inquiry page and permits users to conduct an inquiry and search customer records.

Secondary Permission	Description	Dependent Permissions
Access points balances	Views (but not adjust) balances the customer holds in points programs.	• Edit points balances—increments or decrements the customer's points balances.
Access stored value	Views (but not adjust) balances the customer holds in stored value programs.	• Edit stored value—increments or decrements the customer's stored value balances.
Access transaction history	Views a summary of the customer's recent transactions from the Transactions sub–page under the Customers tab.	
Add household cardholder	Adds a customer to a household using the add button in the Cardholders section on the Customer General page.	
Delete household cardholder	Removes a customer from a household using the delete button in the Cardholders section box on the Customer General page.	

Create customers

This permission allows users to create a new customer.

Delete customer card number

This permission allows users to delete a customer card number.

Edit Receipt Preference

This permission allows users to edit receipt preference of customers in the customer preference page.

Force unlock the customer loyalty cards

This permission allows users to force unlock the customer's loyalty cards.

View customer lock information

This permission allows users to view the lock or unlock information of the customer's loyalty cards. The following information is displayed:

- lock or unlock status of the customer loyalty card
- store location at which the customer's loyalty card was locked
- terminal number at which the customer's loyalty card was locked
- time stamp (date and time) when the customer's loyalty card was locked
- transaction number with which the customer loyalty card was locked
- customer identifier which applied the lock to the household.

Locations

In Logix, Location refers to stores, that is, physical retail locations. If AMS operates at the enterprise level, Location would refer to servers. Stores may be collected together into store groups, which are used to determine where offers are available. This section describes each Location permission.

Access stores

This permission allows users to view (but not modify) existing stores and servers.

Secondary Permission	Description	Dependent Permissions
Create stores	Creates a new store or server.	
Edit stores	Modifies an existing store or server such as renaming, changing address, and so forth.	
Delete stores	Deletes a store or server.	

Access store groups

This permission allows users to view (but not modify) existing store groups.

Secondary Permission	Description	Dependent Permissions
Create store groups	Creates a new store group.	
Edit store groups	Modifies an existing store group, including changing the constituent stores.	
Delete store groups	Deletes a store group.	

Edit terminal sets

This permission allows users to modify the terminal sets information such as the terminal set name, lane type, printer type, and so forth.

Edit UOM sets

This permission allows users to modify the units of measure (UOM) sets information such as the set name, units of Length, units of Surface Area, units of Volume, and units of Weight.

Offers

Offer permissions control access to the Logix offer builder. This section describes each offer permission.

Access offers

This permission allows users to view (but not modify) offers. It controls whether a user can reach the Offers List page; and the External and CAM offer lists.

Secondary Permission	Description	Dependent Permissions
Access instant win offers	Views (but not modify) CPE offers of the Enterprise Instant Win engine subtype.	• Edit instant win offers—creates, deletes, and modifies Enterprise Instant Win offers.
Create external offers	Creates an offer marked as coming from an external source, using the "Create offer for external source" selector on the New Offer page under the External page tab.	
Create offers from blank	Creates a new offer from scratch. This permission grants access to the New Offer page under the Offers page tab. It also enables a New button on the following pages under the Offers page tab: • New Offer page • Offer Configuration page (Actions menu)	
Create offers from templates	Creates a new offer based on an existing offer template. This permission enables a "New offer from template" option under the Actions menu in the Template Summary sub–page.	
Delete offers	Deletes an existing offer.	
Deploy non–template offers	Marks for deployment any offer that did not originate from a template.	
Deploy template offers	Marks for deployment any offer that originated from a template.	

Access offers

This permission allows users to view (but not modify) offers. It controls whether a user can reach the Offers List page; and the External and CAM offer lists.

Secondary Permission	Description	Dependent Permissions
Edit offers	Modifies an existing offer, including changes to its general characteristics such as name, period, and so forth; and adding, removing, or changing its constituent parts such as conditions or rewards.	• Edit offers' locations—modifies the store groups and terminals selected in an offer. • Edit offer source—modifies the “creation source” of an offer on the Offers General page.
Favorite offers for oneself	Marks an offer as a favorite for the current user. When selected, it enables the offer to appear in the "show favorite offers" view of the Customer Offers List table under the Customer Inquiry page tab.	
Favorite offers for others	Marks an offer as a favorite for other users.	
Export offers	Exports an offer to a GZip file using the Export button on the Offer Summary sub–page.	
Import offers	Creates a new offer by importing a file using the Import button on the Offers List page.	
Send offers outbound	Sends an offer of the selected interface if the offer has an external interface that was selected in the Send outbound data selector on the Offer Configuration sub–page. This permission enables a Send outbound button in the Actions menu on the Offer Summary sub–page.	
Approval Manager	Indicates which users are allowed to manage the Offer Approval Workflow Configuration sub-page.	
Offer Approval	Indicates which users are allowed to approve offers as part of the offer workflow.	

Access templates

This permission allows users to view (but not modify) offer templates.

Secondary Permission	Description	Dependent Permissions
Create templates	Creates new offer templates.	
Delete templates	Deletes existing offer templates.	
Edit Templates	Edits existing offer templates in the Offers Templates page.	• Edit templates' locations—edits the locations of the offer templates in the Offers Templates page.

Delete Offers from Folder

This permission allows users to delete an offer from a folder in the Offers Folders page.

Deploy offers past lockout date

This permission allows users to deploy offers past the lockout date set in the folder.

Edit Employee Filtering

This permission allows users to edit employee filtering to either *Available to employees only* or to *Not available to employees* in the Offer General page.

Products

Product permissions control access to product groups and to the product inquiry pages. This section describes each Product permission.

Access product inquiry

This permission allows users to use the Product Inquiry page to view collision information on a given UPC.

Access group inquiry

This permission allows users to use the Group Inquiry page to view collision information for all products in a group.

Access product groups

This permission allows users to view (but not modify) existing product groups.

Secondary Permission	Description	Dependent Permissions
Create product groups	Creates a new product group.	
Edit product groups	Modifies existing product groups such as renaming, adding or removing products, and so forth.	
Delete product groups	Deletes a product group.	

View Restricted Hierarchy Nodes

This permission allows users to view the restricted hierarchy nodes in the Products Group page.

Programs

Program permissions are used for points programs and stored value programs. This section describes each Program permission.

Access points programs

This permission allows users to view (but not modify) existing points programs.

Secondary Permission	Description	Dependent Permissions
Create points programs	Creates a new points program.	
Edit points programs	Modifies existing points programs such as renaming, editing description, and so forth.	
Delete points programs	Deletes a points program.	

Access stored value programs

This permission allows users to view (but not modify) existing stored value programs.

Secondary Permission	Description	Dependent Permissions
Create stored value programs	Creates a new stored value program.	
Edit stored value programs	Modifies existing stored value programs such as renaming, editing a description, and so forth.	
Delete stored value programs	Deletes a stored value program.	

Access trackable coupon programs

This permission allows users to view (but not modify) existing trackable coupon programs.

Secondary Permission	Description	Dependent Permissions
Create trackable coupon programs	Creates a new trackable coupon program.	
Edit trackable coupon programs	Modifies existing trackable coupon programs such as renaming, editing a description, and so forth.	
Delete trackable coupon programs	Deletes a trackable coupon program.	

Appendix G: Logix Promotions

Overview

This appendix provides descriptions and examples of the Logix promotions that can be created in the Logix UI.

- Associate Item Discount
- Associate Transaction Discount
- BOGO Dollar
- BOGO Percent
- Gift Card Reward
- Group Price
- HIGO Item Conditional Simple Percent Off
- LOGO Item Conditional Simple Percent Off
- Membership Dollar Off Item
- Member Dollar Off Transaction
- Membership Group, Cashier Message, and Receipt Message
- Membership Percent Off Item
- Member Percent Off Transaction
- Package Price Group Dollar Off
- Package Price Group Percent Off
- Package Price Group Price Point
- Simple Dollar Off
- Simple Percent Off
- Simple Price Point
- Split Package Price
- Tender
- Tier Transaction Buy Dollar Get Dollars Off
- Tier Transaction Buy Dollar Get Percent Off
- Tier Transaction Buy Quantity Get Dollar Off

- Tier Transaction Buy Quantity Get Percent Off

For information on creating these promotions, refer to *Using the Logix Offer Builder* on page 145.

Associate Item Discount

This offer provides a discount to items purchased by an associate. If the customer is not an associate, the discount is not provided.

Associate Transaction Discount

This offer provides a basket discount to an associate. If the customer is not an associate, the basket discount is not provided.

BOGO Dollar

This offer provides a dollar discount off an item when the customer purchases X of these items. This offer is typically used during a buy one, get one (BOGO) deal.

Example: In a BOGO offer, the condition is to buy 2 items from a specific predefined product group and the reward is to receive a dollar amount off an item. The offer is: BOGO Item A receive $5.00 off Item A. In the transaction, when the customer purchases one Item A, there is no discount. When customer purchases another Item A in the same transaction, the customer receives a $5.00 discount off the second Item A.

BOGO Percent

This offer provides a percent discount off an item when the customer purchases X of these items. This offer is typically used during a buy one, get one (BOGO) deal.

Example: In a BOGO offer, the condition is to buy 2 items from a specific predefined product group and the reward is to receive a percent off an item. The offer is: BOGO Item A receive 10% off Item A. In the transaction, when the customer purchases one Item A, there is no discount. When customer purchases another Item A in the same transaction, the customer receives a 10% discount off the second Item A.

Gift Card Reward

This offer provides a gift card as a reward.

Example: The store gives a $25.00 gift card to customers who purchase $150.00 worth of items.

Group Price

This offer provides a dollar off discount when a customer purchases items from a specific group of items.

Example: The promo permits the customer to purchase 3 items of Item A, which is regularly priced at $5.00 each, and then pay only $9.00 for all items.

HIGO Item Conditional Simple Percent Off

This offer provides a percent off discount from the highest priced item in the transaction.

Example: The offer is: Buy Product Group A, Receive 15% off Product Group A (Item Level, Limit 1). The customer's basket is composed of soap ($8.00), toothpaste ($3.00), and lotion ($6.00). All these items belong to Product Group A. The customer will then receive a discount of 15% off the soap because it is the highest priced item in the basket.

LOGO Item Conditional Simple Percent Off

This offer provides a percent off discount from the lowest priced item in the transaction.

Example: The offer is: Buy Product Group A, Receive 15% off Product Group A (Item Level, Limit 1). The customer's basket is composed of soap ($8.00), toothpaste ($3.00), and lotion ($6.00). All these items belong to Product Group A. The customer will then receive a discount of 15% off the toothpaste because it is the lowest priced item in the basket.

Membership Dollar Off Item

This offer provides a dollar off discount targeted towards a specific customer group and is typically performed to give discounts to a targeted group of customers.

To qualify, the customer must be a part of a specific group. The reward for the offer is set up as a Discount—Fixed Amount Off reward type.

Membership Dollar Off Transaction

This offer provides a dollar off basket discount that is targeted towards a specific customer group. To qualify, the customer must be a member of a specific customer group. The reward for the offer is set as a Discount—Fixed Amount Off type that is applied to the entire basket.

Membership Group, Cashier Message, and Receipt Message

The Membership Group, Cashier Message, and Receipt Message are all rewards that can be issued if the transaction satisfies the condition of an offer.

- Membership Group—rewards the customer with membership to a particular customer group. This reward is useful if you wish to put customers into groups based on their shopping behaviors.

  Example: If a customer purchases pet supplies, you can place them into a pet owners group that receives special pet–related offers.

- Cashier Message—a short text message that is displayed on the CID.

  Example: If a store needs to remind a cashier to perform a certain task before a customer checkout, use a cashier message.

- Receipt Message—a text message included on the customer's receipt.

Membership Percent Off Item

This offer provides a percent off discount targeted towards a specific customer group and is typically performed to give discounts to a targeted group of customers.

To qualify, the customer must be a part of a specific group. The reward for the offer is set up as a Discount—Percent Off reward type.

Membership Percent Off Transaction

This offer provides a percent off basket discount that is targeted towards a specific customer group. To qualify, the customer must be a member of a specific customer group. The reward for the offer is set as a Discount—Percent Off type that is applied to the entire basket.

Package Price Group Dollar Off

This offer provides a dollar off discount when the customer purchases specific items defined in a product group. If the customer purchases any other items, there is no discount.

Example: The promo is to purchase items A, B, and C for $20 off. These items are regularly priced at $50 each. If the customer purchases all these items in a single transaction, the discount is calculated in a prorated amount for each item for a total of $20. If only one or two of these items are purchased, there is no discount.

Package Price Group Percent Off

This offer provides a percent off discount when the customer purchases specific items defined in a product group. If the customer purchases any other items, there is no discount.

Example: The promo is to purchase items A, B, and C for 20% off. These items are regularly priced at $50 each. If the customer purchases all these items in a single transaction, the discount is calculated in a prorated amount for each item for a total of 20%. If only one or two of these items are purchased, there is no discount.

Package Price Group Price Point

This offer provides a price point discount when the customer purchases specific items defined in a product group. If the customer purchases any other items, there is no discount.

Example: The promo is to purchase items A, B, and C for $120. These items are regularly priced at $50 each. If the customer purchases all these items in a single transaction, the discount is rewarded, letting each item have a price of $40. If only one or two of these items are purchased, there is no discount.

Simple Dollar Off

This offer provides a dollar off discount when a customer purchases a specific item.

Example: The offer is set up where the customer receives a specific dollar amount off the defined product group. An example is $2.00 off the Dove soap.

Simple Percent Off

This offer provides a percent off discount when a customer purchases a specific item.

Example: The offer is set up where the customer receives a specific percent off the defined product group. An example is 20% off the Dove soap.

Simple Price Point

This offer modifies and sets the price of an item and provides a price point discount to the customer.

Example: An item is regularly priced at $30.00. With a price point offer, the item is priced at the discount price of $25.00.

Split Package Price

This offer provides a price point discount when the customer purchases a certain quantity of an item. If the customer purchases any quantity that is less than the amount specified in the condition, the full price of the item is in effect.

Example: The promo is buy 3 items for $27. The item is regularly priced at $10. If the customer purchases 3 items, all 3 items are then priced at $9 each, for a total of $27 for all three items instead of $30. All subsequent same items purchased are priced at $9.

Tender

This offer provides a discount when the customer pays through specific tender types. This offer is set up with a tender condition.

Example: The store gives a discount to a customer if they use their VISA card for payment.

Tier Transaction Buy Dollar Get Dollar Off

This offer provides a dollar off discount when the customer purchases a certain dollar amount. This offer involves a tier transaction. It is set up to have multiple tier levels. As the customer spends more dollars, the reward increases.

The condition specifies the amount that the customer must spend to receive the dollar off discount.

Example: The promo is: Buy $25.00, Receive $5 off / Buy $50.00, Receive $15.00 off. If the customer purchases $25.00 worth of items, the customer receives a $5.00 discount off the defined product group in the offer. If the customer continues to purchase items and reaches the $50.00 tier, the customer receives $15.00 off the defined product group in the offer.

Tier Transaction Buy Dollar Get Percent Off

This offer provides a percent off discount when the customer purchases a certain dollar amount. This offer involves a tier transaction. It is set up to have multiple tier levels. As the customer spends more dollars, the reward increases.

The condition specifies the amount that the customer must spend to receive the percent off discount.

Example: The promo is: Buy $25.00, Receive 10% off / Buy $50.00, Receive 25% off. If the customer purchases $25.00 worth of items, the customer receives a 10% discount off the defined product group in the offer. If the customer continues to purchase items and reaches the $50.00 tier, the customer receives 25% off the defined product group in the offer.

Tier Transaction Buy Quantity Get Dollar Off

This offer provides a dollar off discount when the customer purchases a specific quantity of items. This offer involves a tier transaction. It is set up to have multiple tier levels. As the customer buys more items, the reward increases.

The condition specifies the quantity of items that the customer must purchase to receive the dollar off discount.

Example: The promo is: Buy 5 items, Receive $5.00 off / Buy 10 items, Receive $15.00 off. If the customer purchases 5 items, the customer receives a $5.00 discount off the defined product group in the offer. If the customer continues to purchase items and reaches the 10–item tier, the customer receives $15.00 off the defined product group in the offer.

Tier Transaction Buy Quantity Get Percent Off

This offer provides a percent off discount when the customer purchases a specific quantity of items. This offer involves a tier transaction. It is set up to have multiple tier levels. As the customer buys more items, the reward increases.

The condition specifies the quantity of items that the customer must purchase to receive the percent off discount.

Example: The promo is: Buy 5 items, Receive 10% off / Buy 10 items, Receive 25% off. If the customer purchases 5 items, the customer receives a 10% discount off the defined product group in the offer. If the customer continues to purchase items and reaches the 10–item tier, the customer receives 25% off the defined product group in the offer.