

# Logix User Manual: CM Offer Builder



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### Preface

This document is a supplement to the main *Logix User Manual*. It describes how to create and manage offers for NCR's Consumer Marketing (CM) promotion engine using Logix, the web-based interface to NCR's Advanced Marketing Solution (AMS). The CM engine, which is one module in NCR's Advanced Checkout Solution (ACS), implements powerful promotional pricing programs with or without a loyalty card, allowing retailers to operate customized loyalty programs to attract and retain customers. For additional information about ACS and CM, see [www.ncr.com/solutions/pos\\_solutions/pos\\_software/supermarket\\_and\\_grocery/ncr\\_advanced\\_checkout\\_solution.jsp](http://www.ncr.com/solutions/pos_solutions/pos_software/supermarket_and_grocery/ncr_advanced_checkout_solution.jsp).

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

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

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## 1 Summary

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

The screenshot displays the Logix Offer Builder interface. At the top, there is a navigation bar with tabs: Logix, **Offers**, Customers, Products, Programs, Graphics, Locations, and Admin. Below this, a sub-navigation bar includes: Offers, Templates, **Summary**, General, Conditions, Rewards, Locations, and History. The main title is "Offer #4988: Sample Promotion A" with an "Actions" dropdown menu to its right. A red banner below the title states "This offer has been modified." The summary is divided into several sections:

- General**: ID: 4988, External ID: (blank), Engine: CM, CRM Engine: Teradata CRM, Status: Development, Name: Sample Promotion A, Description: This is a sample offer., Folders: Test offers, Category: Huw's Offers, Priority: 33, Limits: Unlimited, Tiers: 0, Reporting: Available, Created by: Huw Williams, Last updated by: Huw Williams.
- Locations**: Banner (All CM Banners), Store groups (All Locations), Terminals (All CM Terminals).
- Conditions**: Customer conditions (Homestore Shoppers (12)), Product conditions (\$10.00 or more of SimProdOne (1)), Time conditions (Monday Tuesday Wednesday Thursday Friday).
- Rewards**: Discounts (Free SimProdTwo, unlimited), Points (1 Stars), Printed messages ("You've received a free SimProdTwo!" Limit 1).
- Validation report**: (Collapsed)
- Period**: Test: 1 Jul 2010 - 31 Jul 2010 (31 days) Began 19 days ago, ends in 11 days. Production: 2 Aug 2010 - 1 Oct 2010 (61 days) Begins in 13 days, ends in 73 days.
- Deployment**: (Collapsed)

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

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

Boxes within the body of the page summarize data editable from other pages in the offer builder, with the exception of the “Deployment” and “Validation report” boxes:

"Deployment" summarizes the results of offer deployment and shows when it was last attempted, when it was last successful and what the latest status was. Also when an offer is deployed, the "Validation report" box will indicate the results of the deployment, both for the offer itself and for its various components (such as product or customer groups). The results are determined by comparing the times on the local and central servers. Valid locations are those for which the times match; watch locations are those for which the times do not match, but the difference is within the defined grace period; warning locations are those that do not match and the difference exceeds the grace period.

### 1.1 Actions

#### 1.1.1 Assign folders

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

#### 1.1.2 Copy offer

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

#### 1.1.3 Delete

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

#### 1.1.4 Deploy

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

#### 1.1.5 Defer deployment

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

#### 1.1.6 Export

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

#### 1.1.7 Export to engine

This action exports the offer in the same XML format that is used when a CM offer is deployed. This allows one who is familiar with the CM engine XML format to examine the XML and verify that the offer produces the desired results prior to deploying the offer. It allows one to manually test a CM offer on a local server without



going through the deployment process. This action may be enabled/disabled via CM option “Enable Engine Export button on offers” (#12).

### 1.1.8 Export to archive

This action becomes available if the "Export to archive" option is selected on the *Offer>General* page. It saves a copy of the offer (as XML in a GZip) to the specified path in the enterprise data warehouse

Note that when an export path is set in *Admin>Settings*, Logix will also automatically export the offer to the archive whenever the offer is successfully deployed or when the offer expires.

### 1.1.9 New

This action loads the *Offer>New* page from which new offers can be created. For details, see chapter 16 of the main *Logix User Manual*.

### 1.1.10 Save as template

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

### 1.1.11 Send to CRM

If an offer is associated to a CRM engine (e.g., Teradata CRM), this action will create an XML document containing the offer data formatted appropriately for that engine, and prompt you to specify the path where it should be saved.

## 2 General

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

- **Name** – Limited to 50 characters, the name should be both descriptive and as brief as possible.
- **Description** – This optional field can hold details about the nature of the offer, its purpose, etc.
- **Category** – The category is an arbitrary classification used for organizing offers. Categories are created and controlled from the *Categories* page under *Administration>Configuration*.
- **Period** – Production is the period when the offer is publicly available to its target customers; testing is the period during which it's available only in test locations. The dates entered here must be in the format MM/DD/YYYY (month/day/year). Click the icon next to the input box to pick a date from a calendar. If CM system option 26 is enabled, then you can also specify times of day for the start and end of each period.
- **Priority** – Priority determines which offers will be displayed first in a transaction. Priority values range from 1 (lowest priority) to 99 (highest).
- **Employee filtering** – Enabling employee filtering will cause the offer to be available only to employees or only to non-employees. The determination of whether or not a customer is an employee is based on the Employee bit on each customer's record, accessible through *Customers>Inquiry*.
- **Banners** – The banners area has checkboxes for each banner to which the offer can be assigned, as well as a checkbox that assigns the offer to all banners. For details on creating and managing banners, see chapter 23 in the main *Logix User Manual*.
- **Limits** – Limits control the frequency at which the offer is made available. For instance, you may want an offer to be available once per transaction, once per day, 3 times every 7 days, etc. For both eligibility and reward, select a frequency or select "Custom" to enter your own frequency. Note that you can set limits that span multiple days, but not multiple transactions.
- **Advanced limits** – Advanced limits are pre-configured, reusable limits created and managed from the *Advanced Limits* section of *Admin>Configuration*; for details, see chapter 11 in the main *Logix User Manual*. Only advanced limits of the type "offer distribution limit" can be applied to the offer.
- **Tiers** – A tiered offer is one that allows multiple "levels" of condition and reward, each with its own unique values. (For instance, spend \$2 and get x, but spend \$3 and get y.) You can select whether the offer is tiered and, if so, how many tiers it should contain. Though you can technically create an offer with as many as 99 tiers, Copient recommends three to four as the practical limit.
- **Outbound** – This designates the CRM engine, if any, to which the offer should be sent.
- **Instant win** – These settings are for use with sweepstakes-type offers. First tick the checkbox to enable Instant Win, then enter the total number of "prizes" (rewards) to be awarded. If you wish the number of prizes to be unlimited, enter zero. Next enter the odds of winning (in the form of 1:n) and the method of applying those odds. If fixed, then odds of 1:100 will always produce exactly one winner per 100 entrants; if random, each customer will have a 1:100 chance and the actual number of winners will be variable. "Odds calculation" sets whether the system will determine multiple times during a transaction if the customer is a winner, or only once for the entire transaction.
- **Advanced options**
  - Export to archive. Ticking this checkbox enables the "Export to archive" action on the *Offers>Summary* page.

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- Defer evaluation until end of sale. Ticking this checkbox causes the offer not to be applied until the end of a transaction.
- Reporting. Ticking the reporting checkbox tells Logix to collect and maintain performance information about the offer for the purposes of generating reports. If enabled, you can link to the offer's reports from the "General" box on the *Offers>Summary* page.
- Favorite for all users allows you with a single click to mark the offer as a favorite for all Logix users. (When marked as a favorite, the offer will appear preferentially in the offers list in customer inquiry.) If you want to mark the offer as a favorite for only a certain set of users, click the user symbol to launch the *Offers>Favorites* popup.

The screenshot shows the Logix Offer Builder interface. At the top is a navigation bar with tabs: Logix, **Offers**, Customers, Products, Programs, Graphics, Locations, Admin, and EPM. Below this is a sub-navigation bar with tabs: **Offers**, Templates, Summary, **General**, Conditions, Rewards, Channels, Locations, and History. The main title is "Offer #21: CM Sample Offer" with a "Save" button to its right.

The interface is divided into several sections:

- Identification**: ID: 21, External ID: None (Generate external ID), Engine: CM, Status: Expired, Name: CM Sample Offer, Description: Sample CM Offer (with a 1000 character limit note), Category: Testing.
- Period**: Enter dates as (MM/DD/YYYY), Production: 9/8/2013 to 9/8/2014.
- Priority**: Enter a priority from 1 (lowest) to 99 (highest): 50.
- Employees**: (Empty section).
- Limits**: 0 per Transaction.
- Tiers**: No tiers (selected), Offer tiers, Item price tiers, Number of tiers (0-99): 0.
- Inbound/Outbound**: Creation source: Logix, Send outbound data to: No external interface.
- Instant win**: Instant win (checkbox), Prizes to award: 0, Odds of winning: 1: 100, Fixed (selected), Random, Odds calculation: (partially visible).

### 3 Conditions

Offers rely on conditions to determine when to grant rewards. For instance, an offer that rewards a customer with 10% off his basket may be conditional on the customer from a particular group first buying 10 private label items. Offers can be controlled by several separate types of conditions: customer, product, points, stored value, tender and day/time. Each one is described in the following chapters.

The *Offers>Conditions* page lists the conditions currently included in the offer. Click the hyperlink in the “Type” column to see details of each condition.

**Offer #21: CM Sample Offer**

This offer has been deployed.

☐ Opt-In Conditions

Add a global condition:

Customer

Reorder	Delete	And/Or	Type	Details	Test	Value
<b>Customer condition</b>						
<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="button" value="X"/>	Customer	Any Cardholder		
<b>Global conditions</b>						
<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="button" value="X"/>	Product	Grill Tools	>=	\$10.000
<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="button" value="X"/>	And	Time/Day		Mon Tue Wed Thu Fri

**Add a condition**

Add a global condition:

Product

#### 3.1 Tiered versus global conditions

Global conditions have a single value that affects the entire offer. Any type of condition can be a global condition. Tiered conditions, however, may have multiple values that, when met, lead to different rewards. Only points, tenders and product groups can be tiered.

For instance, if an offer called for saving 5% when you spend \$50 or more, but 10% when you spend \$100 or more, it would have a tiered condition with two values – \$50 and \$100.

#### 3.2 Customer conditions

Customer conditions are unlike the others in that they can't be logically "and-ed" or "or-ed" with other condition types. For this reason, customer conditions (if any) always occupy their own separate section.

### 3.3 Create

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

Note that only one condition of each of the four types can be added to any given offer.

### 3.4 Reorder

If you have more than one condition in the list, you can reorder them by clicking the up and down arrows at the beginning of each line. The position of a condition affects how the "Or" and "And" attribute for each condition is grouped for processing (see 3.5 below).

### 3.5 And/Or

The Boolean relationship between conditions (that is, the "and" or "or" relationship) controls the manner in which Logix considers conditions to be met.

For instance: An offer might have two conditions, one a customer condition ("must be a member of Group A") and one a points condition ("must have 10 Apple Points"). If they're linked by an "and", then both of them must be met for the offer to take effect – in other words, anyone using the offer must both be in Group A and have 10 Apple Points. However, if the conditions were linked by an "or", then either condition could be met – in other words, anyone in Group A or anyone with 10 Apple Points (or both).

By default, Logix links conditions with the "and" relationship, meaning that all conditions must be met. Clicking an "and" will change it to an "or". The conditions are processed as follows from the first to the last:

- Each set of contiguous "or" condition are grouped and tested.
- The results from "or" tests are then included with the "And" conditions.

Examples:

- Offer has 5 conditions A, (or) B, (and) C, (or) D, (or) E. The grouping will be: (A or B) and (C or D or E).
- In 1) above, move C up one; it becomes A, (and) C, (or) B, (or) D, (or) E. The grouping will be: A and (C or B or D or E).
- In 1) above, change D from "or" to "and"; it becomes A, (or)B, (and)C, (and)D, (or)E. The grouping will be (A or B) and C and (D or E)

### 3.6 Delete

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

## 4 Customer conditions

Customer conditions limit the individuals who are eligible to receive an offer to those who are members of particular customer groups. To create a customer condition, select from the list of available groups the one that you want to be the condition (for example, "Top Decile Customers").

Alternately, you can select "Any Cardholder" which includes any and all customers who have a customer ID. When "Any Cardholder" is selected you can also pick a group to exclude – for example, excluding "Group X" from "Any Cardholder" makes the offer eligible to everyone except members of "Group X."

### 4.1 Customer groups

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

- "Any Cardholders" is a special customer group that represents all customers who have customer IDs or household IDs. With the exception of "New Cardholders", any other customer group can be excluded from it.
- "New Cardholders" is a special group that represents all customers who have customer IDs but do not yet have customer records. You can select this group, but nothing can be excluded from it.
- As for normal, user-made groups, you can select a single group from the list of available groups. Note that one user-made group cannot be excluded from another.

Above the list of available customer groups is a search box you can use to locate groups by name. Select either the "starting with" or "containing" options, then enter part of the group's name in the input box; the list of results will be winnowed down as you type.

**Offer #4988 customer condition** Save

**Customer group**

☒ Starting with ☐ Containing

Any Customer  
Any Cardholder  
New Cardholders  
!\*Cam Test Group 1  
!\*Cam Test Group 10  
!\*Cam Test Group 11  
!\*Cam Test Group 12  
!\*Cam Test Group 2  
!\*Cam Test Group 3  
!\*Cam Test Group 4  
!\*Cam Test Group 5  
!\*Cam Test Group 6  
!\*Cam Test Group 7  
!\*Cam Test Group 8  
!\*Cam Test Group 9

**Selected customers:**  
▼ Select Deselect ▲  
Homestore Shoppers

**Excluded customers:**  
▼ Select Deselect ▲

## 5 Product conditions

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

**Offer #4988 product condition** Save

**Product group**

☒ Starting with ☐ Containing

Any product  
 "Quotes" is about 'quotes'  
 "Quotes" is about 'quotes'(1)  
 "Quotes" is about 'quotes'(2)  
 \* mixer  
 \* mixer(1)  
 \* mixer(2)  
 \* mixer(3)a  
 ?? Products  
 ?? Products(1)  
 ?? Products(2)  
 ?? Products(2)(1)  
 ?? Products(3)  
 ?? Products  
 04-17-10 Deli Kiosk Paper Coupon

**Selected products:**  
Select Deselect ▲

SimProdOne

**Excluded products:**  
Select Deselect ▲

**Value**

Condition value type:  
 Amount (Dollars)

Value needed to satisfy condition:  
 10.000

**Rewards**

Rewards are granted...

☐ Each time the condition is satisfied  
☐ When the value is equal to  
☒ When the value is greater than or equal to

**Advanced options**

☐ Minimum order items only  
☐ Discountable items only  
☐ Use net values

### 5.1 Product groups

To create a product condition, you first must select from the list of available groups the one that you want to be the condition (for example, “Paper Products”). Alternately, you can select “Any Product”, a special group which stands for any and all products. When “Any Product” is selected you can optionally pick another group to exclude – for example, excluding “Paper Products” from “Any Product” makes the offer available to customers who buy any product except paper.

Above the list of available product groups is a search box you can use to locate groups by name. Select either the “starting with” or “containing” options, then enter part of the group’s name in the input box; the list of results will be winnowed down as you type.

### 5.2 Value

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

If you're working with a tiered offer, Logix will prompt you to enter a value for each tier.

### 5.3 Rewards

The buttons in the Rewards box control how rewards are triggered by this product condition.

For example, consider a product condition that requires \$5 worth of paper towels be purchased, and someone buys \$15 worth. If "each time the condition is satisfied" is selected, the customer will get three rewards. If "equal to" is selected, the customer gets no reward (since exactly \$5 is required – no more, no less). If "greater than or equal to" is selected, the customer will get one reward, since his purchase has exceeded the condition.

The "greater than or equal to" behavior is the default.

### 5.4 Advanced options

- **Minimum order items only** – Ticking this checkbox signifies that items flagged as non-discountable should not be taken into account when calculating whether the condition is met. Alcohol and tobacco products are examples of items often flagged as non-discountable. The system automatically excludes items from participating in this condition that do not affect the Transaction Minimum Order Itemizer. This is valid for item-level conditions only.
- **Discountable items only** – If this option is enabled, items that are non-discountable (e.g., alcohol, tobacco, etc.) will not count toward meeting the product condition.
- **Use net values** – If this option is enabled, the net value based on any rewards already given in this promotion execution sequence is used to test the condition rather than the gross value. The order of execution sequence is based on the priority of the offers



## 6 Points conditions

A points condition triggers an offer when a customer accumulates a certain number of points in a particular program. A points condition is normally paired with a negative points reward because, if the customer meets the condition to use his points (like having 10 of them), you'll want to give the customer a reward and use up the points (that is, take 10 away).

### 6.1 Points program

Select the appropriate points program from the list. Above the list of is a search box you can use to locate programs by name; select either the "starting with" or "containing" options, then enter part of the program's name in the input box and the list of results will be winnowed down as you type.

### 6.2 Value

Input the quantity of points that must be accumulated in order for the condition to be met. If you're working with a tiered offer, Logix will prompt you to enter a point quantity for each tier.

Next, select how the value will be satisfied by choosing one of four options:

- Previously earned only – The condition will be met if the customer's balance prior to the current transaction (and not including the current transaction) equals or exceeds the value.
- Currently earned only – The condition will be met if the number of points the customer earns in the current transaction equals or exceeds the value.
- Total earned – The condition will be met if the total of both the balances described above equals or exceeds the value.
- Net – The condition will be met if the total earned (above) minus the amount being redeemed equals or exceeds the value.

### 6.3 Rewards

The buttons in the Rewards box control how rewards are triggered by this points condition.

Selecting "each time" means that a reward will be granted each time the customer reaches the number of points you've defined. "Equal to" will grant the reward only when the exact value is reached but not exceeded.

"Greater than or equal to" grants the reward when the customer meets or exceeds the value.

The "greater than or equal to" behavior is the default.

Offer #4988 points condition

Save

Points program

☒ Starting with
 ☐ Containing

Oscar Meyer Points  
 Pampers Points  
 Pampers Points(1)  
 Penny Points  
 Penny Points(1)  
 Penny Points(2)  
 PLU Points  
 Point Receptacle X3887b  
 Points Cookware  
 Points Test  
 Points--Program  
 POPOP  
 PowerPump Points  
 Program 1284  
 Program for €5 discount  
 Promo 10101  
 PuanProgrami

▼ Select

Deselect ▲

Slusho points

Value

Value needed to satisfy condition:

5

To determine if condition is satisfied, use values

☐ Previously earned only  
☐ Currently earned only  
☒ Total earned (previous + current)  
☐ Net (total earned - currently redeemed)

Rewards

Rewards are granted...

☐ Each time the condition is satisfied  
☐ When the value is equal to  
☒ When the value is greater than or equal to

## 7 Stored value conditions

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

### 7.1 Stored value program

Select the appropriate stored value program from the list. Above the list of is a search box you can use to locate programs by name; select either the "starting with" or "containing" options, then enter part of the program's name in the input box and the list of results will be winnowed down as you type.

### 7.2 Value

Input the quantity of stored value units that must be accumulated in order for the condition to be met. If you're working with a tiered offer, Logix will prompt you to enter a value for each tier.

Next, select how the value will be satisfied by choosing one of two options:

- Previously earned only – The condition will be met if the customer's stored value balance prior to the current transaction (and not including the current transaction) equals or exceeds the value.
- Currently earned only – The condition will be met if the stored value the customer earns in the current transaction equals or exceeds the value.

### 7.3 Rewards

The buttons in the Rewards box control how rewards are triggered by this stored value condition. Selecting "each time" means that a reward will be granted each time the customer reaches the stored value amount you've defined. "Equal to" will grant the reward only when the exact value is reached but not exceeded. "Greater than or equal to" grants the reward when the customer meets or exceeds the value.

The "greater than or equal to" behavior is the default.

**Offer #4988 stored value condition** Save

**Points program**

☒ Starting with ☐ Containing

Search box:

- Dimes From Heaven
- Dimes From Heaven(1)
- Dimes From Heaven(2)
- Dimes From Heaven(3)
- fuel rollback earn
- fuel rollback reward
- Genesis Testing
- GerberRice Points
- Giant Fuel Program
- Huw's program
- Jeff\_SV
- Jeff\_SVpts
- Joe CM Test
- Joe Dec Test
- New Moms Program
- New Moms Program(1)

▼ Select Deselect ▲

Search box: ca\$h mon€¥

**Value**

Value needed to satisfy condition:  
25

To determine if condition is satisfied, use values

☒ Previously earned only  
☐ Currently earned only

**Rewards**

Rewards are granted...

☐ Each time the condition is satisfied  
☐ When the value is equal to  
☒ When the value is greater than or equal to

## 8 Tender conditions

A tender condition is met when a customer pays for items using certain types of tender, such as cash, check, MasterCard, etc., or a certain amount of tender (\$10, \$25, etc.). Tender types are created and managed from the *Tender* page in *Admin>Configuration*; see chapter 35 of the main *Logix User Manual* for details.

### 8.1 Tender types

Tick the checkboxes next to one or more tender types. If you select multiple tender types, the types are considered to be “or”-ed together; in other words, selecting “cash” and “check” means that a customer paying the specified amount either in cash *or* by check will meet the condition.

### 8.2 Value

This is the amount that the customer must tender in order to meet the condition. If you're working with a tiered offer, Logix will prompt you to enter a tender amount for each tier.

### 8.3 Rewards

The buttons in the Rewards box control how rewards are triggered by this tender condition.

Selecting "each time" means that a reward will be granted each time the customer reaches the tender amount you've defined. "Equal to" will grant the reward only when the exact value is reached but not exceeded. "Greater than or equal to" grants the reward when the customer meets or exceeds the value.

The "greater than or equal to" behavior is the default.

**Offer #4988 tender condition**
Save

<b>Types</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> American Express</li> <li><input checked="" type="checkbox"/> Cash</li> <li><input checked="" type="checkbox"/> Checks</li> <li><input type="checkbox"/> Diners Club</li> <li><input type="checkbox"/> Discover</li> <li><input type="checkbox"/> Fuel Fleet Card</li> <li><input type="checkbox"/> Gift Card</li> <li><input type="checkbox"/> Linden Dollars</li> <li><input type="checkbox"/> MasterCard</li> <li><input type="checkbox"/> Monopoly Money</li> <li><input type="checkbox"/> Visa</li> </ul>	<b>Value</b> <p>Value needed to satisfy condition:</p> <input type="text" value="10"/>
<b>Rewards</b> <p>Rewards are granted...</p> <ul style="list-style-type: none"> <li><input type="radio"/> Each time the condition is satisfied</li> <li><input type="radio"/> When the value is equal to</li> <li><input checked="" type="radio"/> When the value is greater than or equal to</li> </ul>	

## 9 Time/day conditions

A time/day condition controls when an offer is available. Availability can be limited to a particular block of time during each day, one or more particular days of the week, or both. Time/day conditions cannot be tiered.

### 9.1 Day

To set a day-based condition, check the boxes next to the days of the week on which the offer should be available. For instance, if you check the Saturday and Sunday boxes, the offer will only be available on weekends.

### 9.2 Time

To set a time-based condition, enter the starting and ending time in the boxes provided using 24-hour format. For instance, to limit the offer to any time after 11AM, enter 11:00 for the start time and 23:59 for the end time.

When you've finished setting the time/day conditions, click Save.

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

**Offer #4988 time condition** Save

**Day**  
Select the days when the offer should be active.

- ☐ Sunday
- ☒ Monday
- ☒ Tuesday
- ☒ Wednesday
- ☒ Thursday
- ☒ Friday
- ☐ Saturday

**Time**  
Enter the time during which the offer should be active, in 24-hour notation. (Example: 2PM to end-of-day would be entered as 14:00 to 23:59.)

Starts  
8 : 00 (HH:MM)

Ends  
20 : 00 (HH:MM)

## 10 Opt-In Conditions

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

☐ **Opt-In Conditions**

Add a global condition:  
 Customer

Reorder	Delete	And/Or	Type	Details	Test	Value
			Customer condition			
			Global conditions			

### 10.1 Opt-in

#### 10.1.1 Customer

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

**Customer group**

☒ Starting with ☐ Containing

Any Cardholder  
 New Cardholders  
 All CAM Cardholders  
 CustomerGroup1  
 Best Customers.  
 Excluded Customers

**Selected customers:**

**Excluded customers:**

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

Eligibility Conditions			
Delete	And/Or	Type	Details
Customer conditions			
<input type="checkbox"/>		Customer	Best Customers.

Conditions				
Reorder	Delete	And/Or	Type	Details
Customer condition				
<input type="button" value="▲"/>	<input type="button" value="▼"/>	<input type="checkbox"/>	Customer	Frequent Shopper Opt-In Group
Global conditions				

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

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

### 10.1.2 Points

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

**Points program**

☒ Starting with   ☐ Containing

Point1  
Points Program A

▼ Select
Deselect ▲

**Value**

Value needed to satisfy condition:

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

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

Eligibility Conditions				
Delete	And/Or	Type	Details	Information
<b>Customer conditions</b>				
<input type="checkbox"/>		Customer	Best Customers.	
<b>Points conditions</b>				
<input checked="" type="checkbox"/>		Points	Points Program A	10 points required



### 10.1.3 Stored Value

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

Stored value program	Value
<input checked="" type="radio"/> Starting with <input type="radio"/> Containing <div>Beauty Club</div> <div>▼ Select      Deselect ▲</div>	Value needed to satisfy condition: <input type="text"/>

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

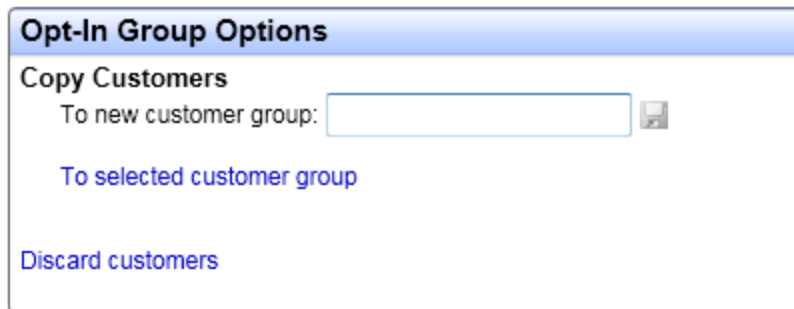
**Note:** The Customer is not required to have the amount of points defined in the Stored Value Eligibility Condition to satisfy the offer. The Stored Value Eligibility Condition is for Opt-in purposes only.

Eligibility Conditions				
Delete	And/Or	Type	Details	Information
Customer conditions				
<input type="checkbox"/>		Customer	Best Customers.	
Stored value conditions				
<input checked="" type="checkbox"/>		Stored value	Beauty Club	10 units required

## 10.2 Opt-out

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

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



The image shows a dialog box titled "Opt-In Group Options". It has a blue header bar with the title. Below the header, the text "Copy Customers" is displayed. Underneath, there is a label "To new customer group:" followed by a text input field and a small icon of a document with a plus sign. Below the input field, there is a blue hyperlink "To selected customer group". At the bottom of the dialog, there is another blue hyperlink "Discard customers".

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

## 11 Rewards

Rewards are those things that are granted, or actions that are performed, when an offer's conditions are met. Rewards fall into the following categories: discounts, printed messages, cashier messages, points, stored value, group membership, XML Pass Through, Catalina coupons, BIN ranges and auto-print gift receipts. Each one is described in the following chapters.

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

The screenshot shows the Logix CM Offer Builder interface. At the top, there are tabs for Logix, Offers, Customers, Products, Programs, Graphics, Locations, Admin, and EPM. Below these, there are sub-tabs for Offers, Templates, Summary, General, Conditions, Rewards, Channels, Locations, and History. The main heading is "Offer #21: CM Sample Offer". A green banner states "This offer has been deployed." Below this is a section titled "Rewards" containing a table with columns: Reorder, Delete, And/Or, Type, Subtype, Product condition, and Details. The table lists three global rewards: a Discount (Free item) for Grill Tools, a Printed Message for Entire transaction, and Points for Entire transaction (1 Stars). Below the table is an "Add a reward" section with a dropdown menu set to "Discount" and an "Add" button.

Reorder	Delete	And/Or	Type	Subtype	Product condition	Details
<b>Global rewards</b>						
▲ ▼	X	And	Discount	Free item	Grill Tools	
▲ ▼	X	And	Printed Message		Entire transaction	
▲ ▼	X	And	Points		Entire transaction	1 Stars

**Add a reward**

Add a global reward

Discount ▼ Add

### 11.1 Tiered versus global rewards

A global reward is granted in a single form, regardless of how it was triggered. A tiered reward, however, may have multiple values (say, different discount amounts) that it will use depending on how it was triggered. For instance, if a two-tiered offer called for saving 5% when customers spend \$50 or more, but 10% if they spend \$100 or more, it would have a tiered discount reward with two values: 5% and 10%.

### 11.2 Create

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

### 11.3 Reorder

If you have more than one reward in the list, you can reorder them by clicking the up and down arrows at the beginning of each line. Since rewards can only have the "and" attribute set, the ordering is only for visual clarity.

### 11.4 And

The Boolean relationship between rewards controls the way Logix distributes those rewards, just as the and-ing of conditions does. By default, Logix links rewards with the "and" relationship, meaning that all rewards will be granted.

## 11.5 Product conditions

Though any CM reward can be accompanied by a product condition created from the *Offer>Conditions* page, some also allow a product condition to be embedded with the reward itself (i.e., an “implied condition”), as a means of simplifying offer setup. These rewards will present a “product group” selector from which you can choose whatever group you wish just as you would when creating a product condition.

If a regular product condition is present on the *Conditions* page and an implied product condition is present within a reward, both conditions must be met for the reward to be granted.

## 11.6 Delete

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

## 12 Discount rewards

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

### 12.1 Product condition

To make the discount contingent on the purchase of certain products, select the appropriate product group from the "Available" list. This group can be either a custom-made group (created from the *Products>Groups* page) or it can be "Any Product", a special group which indicates every item in a transaction. When "Any Product" is selected, you can choose a group to exclude from it; this means that purchasing any product, with the exception of those in the excluded group, will satisfy the eligibility for the reward. To make the discount apply to the customer's basket as a whole, rather than to individual item within it, don't select any product groups.

Above the product group list of is a search box you can use to locate groups by name; select either the "starting with" or "containing" options, then enter part of the group's name in the input box and the list of results will be winnowed down as you type.

### 12.2 Distribution

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

- Amount off transaction – This distribution will deduct a fixed dollar amount from the overall price of the customer's basket. It's available only if no product groups are selected in the product condition selector.
- Percent off transaction – As above, but deducts a certain percentage from the price of the basket.
- Amount off item – Deducts a fixed amount from the price of items in the selected product group.
- Percent off item – Deducts a percentage from the price of items in the selected product group.
- Amount off per weight/volume – Deducts a fixed amount from each pound or gallon of products in the selected product group.
- Price point – Sets a fixed price for items in the selected product group.
- Price point per unit weight – Sets a fixed price for each pound or gallon of items in the selected product group.
- Free item – Items in the selected product group are free.
- Stored value – Awards a certain number of units of stored value for each item in the selected product group.

Depending on the distribution type you choose, you will then enter data about the discount including its amount and its limits.

Note that the types of discounts you can choose from depend on what (if anything) you've selected in the product group box. If no product group is selected, Logix assumes that the discount will be "transaction-level" – in other words, it will apply as a whole to the entire basket. Possible discount types in this case are "amount off transaction" and "percent off transaction".

If your discount is "item-level" (i.e., applying to a specific set of products), you'll next be prompted to select additional information about the discount's distribution:

- Every item gets the discount. Selecting this option tells the system that each item the customer purchases from the selected product group will receive whatever discount is defined. You can also indicate whether a certain minimum number of these products must be purchased before the customer gets the discount.
- Buy x items, get y discounts. This option requires a fixed quantity of items to be purchased in order to get discounts on a certain number of them.
- Prorate discount over x items. Selecting this option will divide the value of the discount over the specified number items – for instance, \$1 off divided among 5 items, for \$0.20 off each one.

If you're working with a tiered offer, Logix will prompt you to enter a quantity for each tier.

### 12.3 Limits

The limits value controls the maximum amount that will be given away as the result of a customer receiving the reward. You can set a particular quantity, weight or volume of products as the limit in each transaction, or as the limit over a set number of days.

Checking the "reward can exceed item value" box will allow the value of the discount to exceed that of the item being discounted, potentially resulting in a negative item value.

### 12.4 Sponsor

The sponsor – either the store or a product vendor – is the party associated with the value of the discount being awarded.

### 12.5 Message

If you want a brief message to appear on the customer's receipt next to the discount when this reward is given, enter the text into the "Receipt Discount Description" box provided. Buttons may be present beneath the input box; clicking them will insert special tags into the message that will be replaced by variable data. See the appendix of the main *Logix User Manual* for a list of tags with descriptions of their functions.

### 12.6 Chargeback department

Selecting a chargeback department allows any discounts that are awarded to be tracked in relation to a specific store department (for example, Pharmacy, Floral, etc.).

### 12.7 Special pricing

Using a special pricing method allows you to award discounts according to a defined pattern – for instance, award 10¢ off when the first product is purchased, then 15¢ for the next one, then 25¢ every time thereafter.

To use this feature, click the "enable special pricing" box and enter the values into the boxes provided. Click the radio button next to the value at which the pricing method should repeat. (In the example given above, you would click the button next to the third value, 25¢, to make the pattern repeat at that point.)

### 12.8 Advanced options

Some or all of the advanced options below may be available based on the characteristics of your discount and the configuration of your installation.

- **Static fuel discount** – This option is only available for a discount reward of type “amount off per volume”. If it is enabled, it informs the point-of-sale to present this discount when triggered to the Fuel System along with any fuel discounts returned via stored value programs.
- **Best deal** – A customer may sometimes be eligible for multiple discounts on the same set of products. Checking this box will award the customer the single reward that's most favorable for him or her.
- **Promote to transaction level** – This consolidates multiple instances of a reward within an offer to occur only once, as if it were a transaction-level reward.
- **Exclude from item-level distribution** – Prevents items used by this reward that were used in granting a cash reward from participating in prorating the cash reward amongst all the items that participated in the cash reward.
- **Reward decrements minimum order** – The cash reward value of the discount will be subtracted from the Transaction Minimum Order Itemizer which is a total maintained by the point-of-sale.
- **Discountable items only** – This reward will apply only to items considered discountable. The system will automatically exclude items from participating in this reward that do not affect the Transaction Discountable Itemizer. This is valid for item-level rewards only.

**Offer #4988 discount reward**
Save

**Product condition**

☒ Starting with
 ☐ Containing

FL Holiday Excluded Products  
 Floral Dept 0700  
 Floral Dept 0700(1)  
 Floral Dept 0700(2)  
 Flower Deal  
 Flowers  
 Fluffy Puff Marshmallows  
 Frequent Dept in Tier sim  
 Frequent UPC in Tier Sim  
 Fresh Chicken List Pearland 8-21-08  
 Fuel Shadow Upload Only East Edward

**Selected products:**  
Select Deselect ▲  
 SimProdTwo

**Excluded products:**  
Select Deselect ▲

**Advanced options**

☐ Static fuel discount  
☒ Best deal  
☐ Promote to transaction level  
☐ Discountable items only

**Distribution**

Discount: Free Item

☒ Every item gets the discount  
 Must purchase 1 item(s)

☐ Buy item(s), get discount(s)

☐ Prorate discount over item(s)

**Limits**

Advanced Limits:
 

None

0.000 Amount per 0

Transaction

☐ Reward can exceed item value

**Sponsor**

☒ Store
 ☐ Vendor

**Message**

Youve received a free SimProdTwo!

Base#	Base\$	Reward#	Reward\$	Used#	Used\$
Usedlb	Usedkg	Qty			

**Chargeback department**

Item's department

**Special Pricing**

☐ Enable special pricing

Add Value

Use the radio buttons to select the value at which the pricing should repeat. Click the "X" to delete a value.

## 13 Printed message rewards

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

### 13.1 Product condition

To make receiving a printed message contingent on the purchase of certain products, select the appropriate product group from the "Available" list. This group can be either a custom-made group (created from the *Products>Groups* page) or it can be "Any Product", a special group which indicates every item in a transaction. When "Any Product" is selected, you can choose a group to exclude from it; this means that purchasing any product, with the exception of those in the excluded group, will satisfy the eligibility for the reward. To associate the reward to the transaction as a whole, rather than to individual items within it, don't select any product groups.

Above the product group list of is a search box you can use to locate groups by name; select either the "starting with" or "containing" options, then enter part of the group's name in the input box and the list of results will be winnowed down as you type.

### 13.2 Message

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

The "Location" dropdown controls where the message will be inserted on the receipt:

- Regular – the message will be with the transaction totals.
- Summary – the message will be after the transaction record but before any trailers.
- After Trailer – the message will be at the very end of the receipt.
- Sweepstakes – If the reward is item level the message will be with the item. Otherwise, it will be after the transaction record but before any trailers.

To indicate that the message should be printed on the reverse side of the paper, tick the "Print on back of receipt" checkbox.

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

Clicking the "Preview" button will display in a popup window an approximation of what the message will look like when printed on a receipt. When previewing, first select the appropriate printer from the printer dropdown.

### 13.3 Limits

This value controls the maximum number of times the message will be given. The limit may be in the form of x times per transaction, or x times per y days.



## 13.4 Sponsor

The sponsor – either the store or a product vendor – is the party against which the granting of the message is tracked.

## 13.5 Advanced options

- **Promote to transaction level** – This consolidates multiple instances of the reward within an offer to print only once, as if it were a transaction-level reward.

**Offer #4988 Printed message reward**
Preview
Save

**Product condition**

Selected: Entire transaction
Available:

- Floral Dept 0700(2)
- Flower Deal
- Flowers
- Fluffy Puff Marshmallows
- Frequent Dept in Tier sim
- Frequent UPC in Tier Sim

Excluded:

**Limits**

1 per Transaction

**Sponsor**

☒ Store ☐ Vendor

**Advanced options**

☐ Promote to transaction level

**Printer**

Select an installed printer:  
NCR ACS POS

**Message**

Location: After Trailer

Message

|B|You've received a free SimProdTwo!

Normal B I U High Wide

Center Right Line Stars Logo Cut Cut85 Upca Ean13

Code39 Customerid Firstname Lastname Net#

Initial# Eamed# Redeemed# Net\$

Initial\$ Eamed\$ Redeemed\$ Svbal Svval

Svvalexp Svlimit Svbalexp Cashierid

## 14 Cashier message rewards

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

### 14.1 Product condition

New cashier messages by default are awarded for an entire transaction. To make it contingent on the purchase of certain products, select the appropriate product group from the "Available" list. This group can be either a custom-made group (created from the *Products>Groups* page) or it can be "Any Product", a special group which indicates every item in a transaction. When "Any Product" is selected, you can choose a group to exclude from it; this means that purchasing any product, with the exception of those in the excluded group, will satisfy the eligibility for the reward. To make the message apply to the customer's basket as a whole, rather than to individual item within it, don't select any product groups.

Above the product group list of is a search box you can use to locate groups by name; select either the "starting with" or "containing" options, then enter part of the group's name in the input box and the list of results will be winnowed down as you type.

### 14.2 Message

Enter a short text message into the input box provided. If you want the message to display as soon as the conditions are met, check the "display immediately" box.

### 14.3 Limits

This value controls the maximum number of times the message will be given. The limit may be in the form of x times per transaction, or x times per y days.

### 14.4 Sponsor

The sponsor – either the store or a product vendor – is the party against which the granting of the message is tracked.

Offer #4988 cashier message reward

Save

Product condition

☒ Starting with
 ☐ Containing

Any Product

"Quotes" is about 'quotes'  
 "Quotes" is about 'quotes'(1)  
 "Quotes" is about 'quotes'(2)  
 \* mixer  
 \* mixer(1)  
 \* mixer(2)  
 \* mixer(3)a  
 ?? Products  
 ?? Products(1)

Selected products:

Excluded products:

Message

Line:

☐ Display immediately

Limits

per

Sponsor

☒ Store
 ☐ Vendor

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## 15 Points rewards

A points reward grants a customer a certain number of points in a particular points program.

### 15.1 Product condition

To make the points reward contingent on the purchase of certain products, select the appropriate product group from the "Available" list. This group can be either a custom-made group (created from the *Products>Groups* page) or it can be "Any Product", a special group which indicates every item in a transaction. When "Any Product" is selected, you can choose a group to exclude from it; this means that purchasing any product, with the exception of those in the excluded group, will satisfy the eligibility for the reward. To associate the reward to the transaction as a whole, rather than to individual items within it, don't select any product groups.

Above the product group list of is a search box you can use to locate groups by name; select either the "starting with" or "containing" options, then enter part of the group's name in the input box and the list of results will be winnowed down as you type.

### 15.2 Department

Selecting a chargeback department allows any points that are awarded to be tracked in relation to a specific store department or group.

### 15.3 Sponsor

The sponsor – either the store or a product vendor – is the party associated with the value of the points being awarded.

### 15.4 Message

If you want a brief message to appear on the customer's receipt when the points are given, enter the text into the box provided.

### 15.5 Points program

Select the appropriate points program from the list provided. Above the list of is a search box you can use to locate programs by name; select either the "starting with" or "containing" options, then enter part of the program's name in the input box and the list of results will be winnowed down as you type.

### 15.6 Distribution

The settings in the distribution box control what is given and how. First, select a points program and enter the quantity of points that should be awarded. (If you want the reward to remove points from the customer's balance, enter a negative value.) Then choose whether every item (of those in the selected product group) triggers the granting of points, or whether a certain fixed quantity of items must be purchased.

If you're working with a tiered offer, Logix will prompt you to enter a point quantity for each tier.

### 15.7 Limits

This value controls the maximum number of points that will be awarded. If you want to remove points from the customer's balance, enter a negative value. The limit may be in the form of x times per transaction, or x times per y days.

## 15.8 Special pricing

Using a special pricing method allows you to award points according to a defined pattern – for instance, award 5 points first, then 10 points, then 12 points every time thereafter.

To use this feature, click the "enable special pricing" box and enter the values into the boxes provided. Click the radio button next to the value at which the pricing method should repeat. (In the example given above, you would click the button next to the third value, 12, to make the pattern repeat at that point.)

## 15.9 Advanced options

- Promote to transaction level: This consolidates multiple instances of a reward within an offer to print only once, as if it were a transaction-level reward.
- Discountable items only: If this option is enabled, only items which have the discountable flag set in ACS will participate in this reward.

**Offer #4988 points reward**
Save

**Product condition**

☒ Starting with
 ☐ Containing

23715 !\* CAMS Product Group  
 23800 !\* CAMS Product Group  
 23841 !\* CAMS Product Group  
 23866 !\* CAMS Product Group  
 23895 !\* CAMS Product Group  
 24166 !\* CAMS Product Group  
 24175 !\* CAMS Product Group  
 24197 !\* CAMS Product Group  
 24205 !\* CAMS Product Group  
 24228 !\* CAMS Product Group

**Selected products:**  
▼ Select Deselect ▲

**Excluded products:**  
▼ Select Deselect ▲

**Program**

☒ Starting with
 ☐ Containing

HH Test Points  
 Householved Points  
 Householved Points(1)  
 Huw Points  
 ImaginationPoints  
 JeffPts  
 Joe CAM  
 Joe Dollars  
 Joe Test External Points  
 KNL CAM Points Program

**Selected program**  
▼ Select Deselect ▲

Stars

**Distribution**  
 1 per Transaction

**Department**  
 Item's department

**Sponsor**  
☒ Store ☐ Vendor

**Message**  

Base#	Base\$	Reward#	Reward\$	Used#	Used\$
Usedlb	Usedkg	Qty			

 (Points are POS silent if no message is included. )

**Limits**  
 1.000 point(s) per Transaction

**Special Pricing**  
☐ Enable special pricing  
Add Value  
 Use the radio buttons to select the value at which the pricing should repeat. Click the "X" to delete a value.

**Advanced options**  
☐ Promote to transaction level  
☐ Discountable items only

## 16 Stored value rewards

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

**Offer #4988 stored value reward** Save

<b>Product condition</b> <input checked="" type="radio"/> Starting with <input type="radio"/> Containing <input type="text"/> <ul style="list-style-type: none"> <li>Fast Forward Shadow UPC</li> <li>FL Holiday Excluded Products</li> <li>Floral Dept 0700</li> <li>Floral Dept 0700(1)</li> <li>Floral Dept 0700(2)</li> <li>Flower Deal</li> <li>Flowers</li> <li>Fluffy Puff Marshmallows</li> <li>Frequent Dept in Tier sim</li> <li>Frequent UPC in Tier Sim</li> <li>Fresh Chicken List Deal end 8-21-08</li> </ul> <b>Selected products:</b> <input type="button" value="Select"/> <input type="button" value="Deselect"/> <input type="text"/> <b>Excluded products:</b> <input type="button" value="Select"/> <input type="button" value="Deselect"/> <input type="text"/>	<b>Program</b> <input checked="" type="radio"/> Starting with <input type="radio"/> Containing <input type="text"/> <ul style="list-style-type: none"> <li>Huw's program</li> <li>Jeff_SV</li> <li>Jeff_SVpts</li> <li>Joe CM Test</li> <li>Joe Dec Test</li> <li>New Moms Program</li> <li>New Moms Program(1)</li> <li>New Moms Program(2)</li> <li>Pennies from Heaven</li> <li>Points Test 1</li> </ul> <b>Selected program</b> <input type="button" value="Select"/> <input type="button" value="Deselect"/> <input type="text" value="ca\$h mon€¥"/>												
<b>Department</b> <input type="text" value="Item's department"/>	<b>Distribution</b> <input type="text" value="5"/> per <input type="text" value="Transaction"/>												
<b>Sponsor</b> <input checked="" type="radio"/> Store <input type="radio"/> Vendor	<b>Limits</b> <input type="text" value="0.000"/> point(s) per <input type="text" value="Transaction"/>												
<b>Message</b> <input type="text"/> <table border="1"> <tr> <td>Base#</td> <td>Base\$</td> <td>Reward#</td> <td>Reward\$</td> <td>Used#</td> <td>Used\$</td> </tr> <tr> <td>Usedlb</td> <td>Usedkg</td> <td>Qty</td> <td></td> <td></td> <td></td> </tr> </table>	Base#	Base\$	Reward#	Reward\$	Used#	Used\$	Usedlb	Usedkg	Qty				<b>Special Pricing</b> <input type="checkbox"/> Enable special pricing <input type="button" value="Add Value"/> Use the radio buttons to select the value at which the pricing should repeat. Click the "X" to delete a value.
Base#	Base\$	Reward#	Reward\$	Used#	Used\$								
Usedlb	Usedkg	Qty											
<b>Advanced options</b> <input type="checkbox"/> Promote to transaction level <input type="checkbox"/> Discountable items only													

### 16.1 Product condition

To make the stored value reward contingent on the purchase of certain products, select the appropriate product group from the "Available" list. This group can be either a custom-made group (created from the *Products>Groups* page) or it can be "Any Product", a special group which indicates every item in a transaction. When "Any Product" is selected, you can choose a group to exclude from it; this means that purchasing any product, with the exception of those in the excluded group, will satisfy the eligibility for the reward. To associate the reward to the transaction as a whole, rather than to individual items within it, don't select any product groups.

Above the product group list of is a search box you can use to locate groups by name; select either the "starting with" or "containing" options, then enter part of the group's name in the input box and the list of results will be winnowed down as you type.

## 16.2 Department

Selecting a chargeback department allows any stored value that's awarded to be tracked in relation to a specific store department.

## 16.3 Sponsor

The sponsor – either the store or a product vendor – is the party associated with the value being awarded.

## 16.4 Message

If you want a brief message to appear on the customer's receipt when this reward is given, enter the text into the box provided. Below the box are buttons that can be used to insert tags into the message – these tags are converted into values when the message is printed. (For instance, the |QTY| tag gets converted to the actual quantity being awarded.) For a list of tags and how they're used, see the appendix of the main *Logix User Manual*.

## 16.5 Points program

Select the appropriate stored value program from the list provided. Above the list of is a search box you can use to locate programs by name; select either the “starting with” or “containing” options, then enter part of the program's name in the input box and the list of results will be winnowed down as you type.

## 16.6 Distribution

The settings in the distribution box control how the stored value is awarded. First, enter the quantity of stored value that the customer should receive. (If you want the reward to remove value from the customer's balance, enter a negative figure.) Then use the dropdown selector to choose how this quantity is granted:

- Per transaction. (e.g. 3 points per transaction, rewards 3 points)
- Per transaction amount – Per transaction dollar total (e.g. Transaction total = \$10.00, 3 points per transaction rewards 30 points)
- Per discountable amount – Per discountable dollar total (e.g. Discountable total = \$7.00, 3 points per transaction rewards 21 points). If you're working with a tiered offer, Logix will prompt you to enter a value for each tier.

## 16.7 Limits

This value controls the maximum amount of stored value that will be awarded. The limit may be in the form of x times per transaction, or x times per y days. You can also cap the award amount to a certain value per customer.

## 16.8 Special pricing

Using a special pricing method allows you to award value according to a defined pattern – for instance, award 5 first, then 10, then 12 every time thereafter.

To use this feature, click the "enable special pricing" box and enter the values into the boxes provided. Click the radio button next to the value at which the pricing method should repeat. (In the example given above, you

would click the button next to the third value, 12, to make the pattern repeat at that point.) Use the “add value” to create new special pricing levels, and the red “X” button to delete them.

### 16.9 Advanced options

- **Promote to transaction level** – This consolidates multiple instances of a reward within an offer to print only once, as if it were a transaction-level reward.
- **Discountable items only** – If this option is enabled, only items which have the discountable flag set in ACS will participate in this reward.

## 17 Group membership rewards

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

### 17.1 Customer group

Select the customer group to which membership should be added. Above the list of is a search box you can use to locate groups by name; select either the “starting with” or “containing” options, then enter part of the group’s name in the input box and the list of results will be winnowed down as you type.

**Offer #4988 membership reward**Save

**Group**  
Grant membership to the following group  
☒ Starting with ☐ Containing  
test  
test 1  
Test By Nid  
Test CAM Customer Group  
test customer group 123  
Test Group 1  
Test Group(1)  
test(20)  
testcustomergrfoupfordemo  
testcuspmergroup  
Testing Website Display  
▼ Select Deselect ▲



## 18 Catalina coupons

This reward type is not available by default, so it must be turned on during installation if it desired. It is used to inform the ACS POS to pass a particular value (MCLU) to an external Catalina Coupon process at the point-of-sale when this reward is triggered. It uses the CM "XML Passthru" format for the data.

### 18.1 Product condition

A Catalina Coupon by default is awarded for an entire transaction. To make it contingent on the purchase of certain products, select the appropriate product group from the "Available" list. This group can be either a custom-made group (created from the *Products>Groups* page) or it can be "Any Product", a special group which indicates every item in a transaction. When "Any Product" is selected, you can choose a group to exclude from it; this means that purchasing any product, with the exception of those in the excluded group, will satisfy the eligibility for the reward.

### 18.2 Limits

This value controls the maximum number of times the MCLU will be sent. The limit may be in the form of x times per transaction, or x times per y days.

### 18.3 Sponsor

The sponsor – either the store or a product vendor – is the party against which the granting of the XML is tracked.

### 18.4 MCLU

This is the value passed to the external application via the point-of-sale. It is limited to 14 digits.





## 19 BIN range rewards

BINs are Bank Identification Numbers, numeric codes sometimes used in tender types to indicate the institution that issued a card. A BIN reward allows the user to define a range of BINs to associate to a particular CM tender type condition.

This reward type is not available by default, so it must be turned on during installation if it desired. It is used to inform the ACS POS to pass a particular value (BIN Range) to the point-of-sale when this reward is triggered. It uses the CM “XML Passthru” format for the data.

**Offer #4988 Bin Ranges Reward** Save

**Bin Ranges**

Insert	Delete	Beginning Value	Ending Value	Tender
 		<input type="text"/>	<input type="text"/>	None 

## 20 Auto-print gift receipt

This reward type is not available by default, so it must be turned on during installation if it desired. It is used to inform the ACS POS to pass a boolean value (Auto-Print Gift Receipt) to the point-of-sale when this reward is triggered. It uses the CM “XML Passthru” format for the data.

When this reward type is triggered, the point-of-sale system is sent the “Auto Print Gift Receipt” message in order to print a gift receipt at the end of the transaction.

### 20.1 Product condition

An Auto Print Gift Receipt by default is awarded for an entire transaction. To make it contingent on the purchase of certain products, select the appropriate product group from the "Available" list. This group can be either a custom-made group (created from the Products>Groups page) or it can be "Any Product", a special group which indicates every item in a transaction. When "Any Product" is selected, you can choose a group to exclude from it; this means that purchasing any product, with the exception of those in the excluded group, will satisfy the eligibility for the reward.

### 20.2 Limits

This value controls the maximum number of times the message will be sent. The limit may be in the form of x times per transaction, or x times per y days.

### 20.3 Message

This is the value passed to the external application via the point-of-sale. It is set to “Auto Print Gift Receipt”.

## 21 Channels

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

The screenshot shows the Logix CM Offer Builder interface. At the top, there are tabs for Logix, Offers, Customers, Products, Programs, Graphics, Locations, Admin, and EPM. Below these, there are sub-tabs for Offers, Templates, Summary, General, Conditions, Rewards, Channels, Locations, and History. The 'Channels' tab is selected. The main content area shows 'Offer #21: CM Sample Offer' with a green status bar indicating 'This offer has been deployed.' Below this, there is a 'Delivery Selection' section with four radio buttons: 'Use Legacy web/kiosk delivery' (selected), 'Don't show on customer-facing website', 'Display on web kiosk', and 'Use channels'. Below the 'Delivery Selection' section, there is a 'Channels' section with two items: 'Kiosk' and 'Website', each with a plus icon and a star icon.

### 21.1 Delivery Selections

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

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

The screenshot shows the 'Delivery Selection' section of the Logix CM Offer Builder interface. It contains four radio buttons: 'Use Legacy web/kiosk delivery' (selected), 'Don't show on customer-facing website', 'Display on web kiosk', and 'Use channels'.

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

## 21.2 Channels

Channels allow retailers an enhanced way to advertise offers to customers via the Kiosk or Website. Retailers can choose both channels or specify certain channels to which to send offer data.

### 21.2.1 Kiosks

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

**Channels**

☒ Kiosk  
☐ Point of sale  
☐ Website

Start date: 9/4/2013 End date: 9/4/2014   
 English (U.S.)  
☒ Kiosk offer description :   
☒ Kiosk offer graphic :   
 Ready

### 21.2.2 Website

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

**Channels**

☐ Kiosk  
☐ Point of sale  
☒ Website

Start date: 9/4/2013 End date: 9/4/2014   
 English (U.S.)  
☒ Website offer description :   
☒ Website offer graphic :   
 Ready

## 22 Locations

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

### 22.1 Store groups

To make the offer available to the stores in a particular group, select the group from the "Available" list and move it to the "Selected" list. To make the offer available at all stores, select "All Locations" and move it to the "Selected" list.

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

### 22.2 Terminals

In some cases you may want an offer to be available at regular checkouts but not express lanes, or at fuel stations but not regular checkouts. Select the terminal types you want from the "Available" list and move them into the "Selected" list.

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

The screenshot displays the Logix CM Offer Builder interface, specifically the 'Locations' tab. The interface is organized into two main columns: 'Store groups' and 'Terminals'. Each column contains three lists: 'Available', 'Selected', and 'Excluded'. In the 'Store groups' column, the 'Available' list shows 'All stores' and 'Test Store Group'. The 'Selected' list shows 'Southwest Stores'. In the 'Terminals' column, the 'Available' list shows 'All CM terminals'. The 'Selected' list shows 'All CM terminals'. The 'Excluded' lists are empty. The interface includes navigation tabs at the top (Logix, Offers, Customers, Products, Programs, Graphics, Locations, Admin, EPM) and bottom (Offers, Templates, Summary, General, Conditions, Rewards, Channels, Locations, History). A sidebar on the right contains a search bar and a list of offers.

## 23 History

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