



# **LS Retail**

## **Mobile Loyalty User Guide**

LS Retail NAV 2013





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# 1 Introduction

The purpose of this document is to give an overview of Mobile Loyalty in NAV and the Published Offers functionality.

## 1.1 Definitions, Acronyms and Abbreviations

Term	Description
Mobile Database	Microsoft SQL Server database used by Mobile devices
QR-Code	Two dimensional bar code

## 2 Mobile Loyalty

The Mobile Loyalty functionality is an addition to the Member Management system introduced in LS version 6.3.

This new functionality gives the Retailer the ability to publish already specified offer or coupon to a mobile device user (Mobile Phones, Tablets) who is registered as Member Contact in the Member Management System. The Retailer can direct certain offers or coupons to a member that has registered special interests. The member can then select the offers he or she wants to trigger on the device and connect it to the POS by a QR-Code. The POS user can scan the QR-Code and activate the offers and coupons selected by the member at any time during a transaction.

Necessary Data is replicated from the NAV database to the Mobile Database using Scheduled Jobs and Data Director. The Mobile system can only create or update data in NAV by using Web Services.

A separate document, **Mobile Loyalty and NAV Data Mapping** has been created and describes the table and field mapping for the data replication between Mobile and NAV.

### 3 Published Offers

Offers and Coupons can be published in a simplified manner to mobile devices. The customer will only see what is important for him or her about each offer regardless of the complications in creating and using each offer.

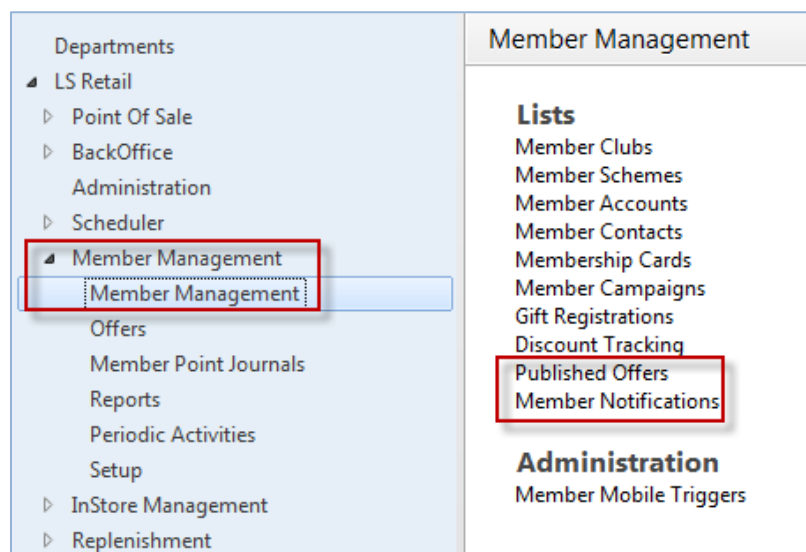
By adding Published Offers to the traditional way of displaying offers it can be used not only for smartphones but also as a way to display offers in/on:

- Different types of mobile phones/smartphones
- Pads
- Webstores
- Portals
- eCommerce
- As a different way of displaying offers in Stores

The solution is at first mainly developed for smartphones.

In the Quick Guides for Prices and Offers, Member Management and Coupons there are further information on how offers, member points and coupons are used in LS Retail – NAV. Notifications can also be published to club members.

This new functionality is available from the LS Retail – Member Mgmt menu at **LS Retail, Member Management, Member Management, Lists, Published Offers/Member Notifications:**



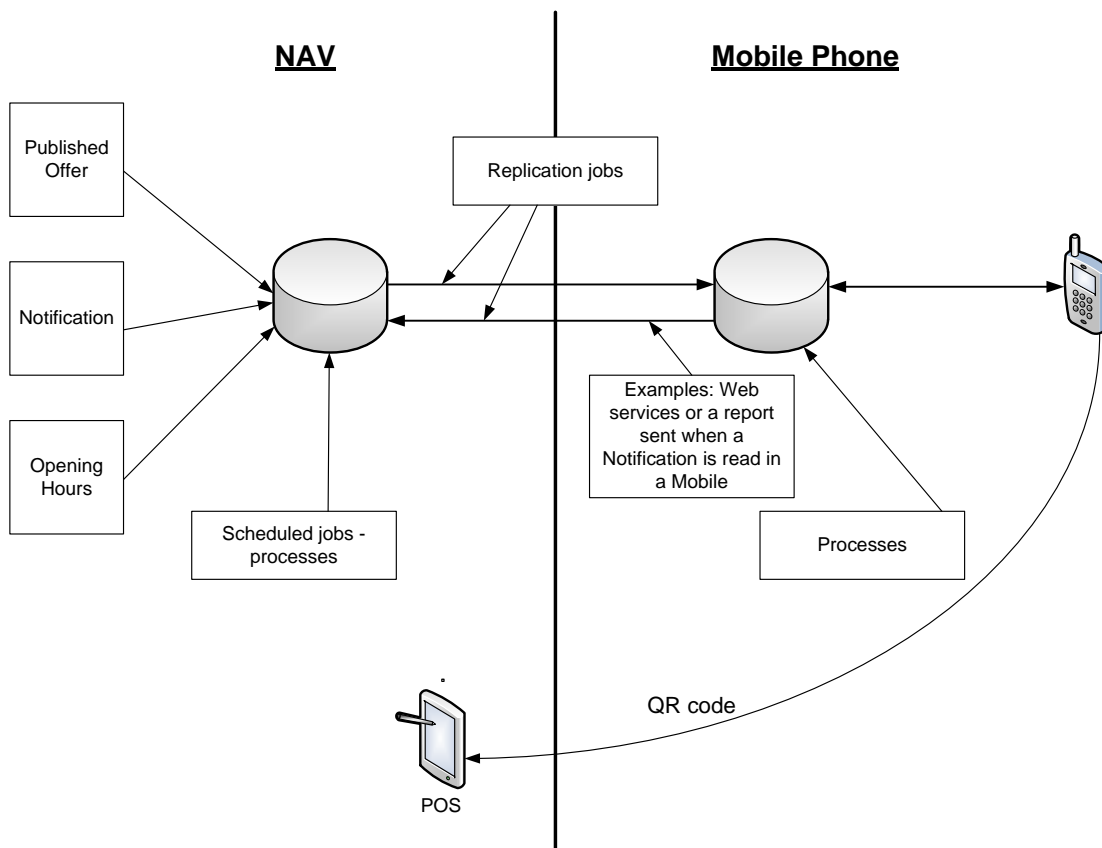
### 3.1 Overview

All Offers, Store Coupons and Member Management functionality that the LS Retail NAV has available can be used as Published Offers. There are two main categories of offers:

- General offers that are aimed at everyone
- Specific offers that are aimed at special groups or individuals

Using smartphones and similar means to reach the customer gives the opportunity to access him or her with more direct offers than otherwise, aimed at certain people or groups. For instance big spenders that shop a lot in a department store but never visit the sports department might get a coupon sent with an offer that gives him or her 50 Euros discount in the sports department for a purchase of 150 Euros or more. This offer would pursue a valuable customer that normally buys sportswear and -equipment elsewhere to visit the sports department and possibly become a regular buyer.

The following schema describes the interaction between the NAV system and the Mobile devices.



### 3.1.1 The Member Offer Trigger Table

The Member Offer Trigger table contains information about to whom to display a Published Offer. Offer can be published to all club members, to all club members in a certain scheme, to all contacts linked to an account or to a single contact.

The table consists of the following fields:

- **Entry No.** Unique ID, counter.
- **Type.** Type can be: Club, Scheme, Account or a Contact to which the offer is published to.
- **Code.** Code for the Type.
- **Contact No.** Contact Number when the Type is Contact.
- **Trigger Type.** The Trigger Type can be: Offer, Coupon or Notification.
- **Trigger ID.** Code for the Trigger Type.
- **Query Needed.** True - checkbox checked - if triggering an offer needs to be evaluated (with a query). An example could be the Birthday of a Contact. Not supported in LS Retail NAV 2013.
- **Starting Date.** Starting Date to Display.
- **Ending Date.** Ending Date to Display.
- **Disabled.** Will be set to true when expired.
- **Last Changed.** Date when the record was last changed.
- **Repl. Counter.** Replication Counter.

## 3.2 Information in the QR Code

The QR code contains a XML document. The Mobile App creates the code when the customer has decided which offers and coupons he or she wants to accept or use. It also contains identification information about the customer.

When the QR-code is scanned at the POS the POS can identify the customer by the Membership Card ID. Then all coupons are registered in the POS like they were scanned individually. Item point offers are also stored in a queue and processed if and when an item is scanned that triggers the offer.

A device user can receive published offers and select them on its device. When the customer has selected the offers and / or coupons the device creates a QR-Code and displays it on the device for scanning. The QR code includes information about the contact in a XML format like this:

```
<mobiledevice>
  <accountid>MA000001</accountid>
  <contactid>MO000001</contactid>
```



```
<cardid>10001</cardid>
<coupons>
  <cid>MOB0000050</cid>
  <cid>COUP0101</cid>
</coupons>
<offers>
  <oid>P1054</oid>
  <oid>P1021</oid>
</offers>
</mobiledevice>
```

For the above information the QR-Code looks like this:



When the QR-Code is processed on the POS then the POS will validate that the QR-code information is still valid. For example if the customer has selected an Item Point Offer the POS checks the Point balance. Once a coupon or some points have been used, his/hers account is updated. The QR code will always be linked to the latest information on the user.

### 3.3 Scheduler Jobs

The following table shows the Scheduler Jobs that were created to support the replication of data from NAV to the Mobile database. This information is available in the Cronus LS Demo Company.

#### Data Replication:

Job ID	Description
M_2MOBILE	Pushes changes from NAV to the Mobile

	Database. (By Actions)
M_2MOBILE_NORM	Pushes all relevant data from NAV to the Mobile Database (Normal)
M_TR2_MOBILE	Pushes all Transactions related to members from NAV to the Mobile Database. (Headers, sales lines and payments).
MOB_2_NAV	Pushes all data from the Mobile Database to NAV (Normal). In the version 7 only statistical information about the activities of the mobile user is stored. This is available for later use.

**Processes:**

Job ID	Description
M_CALC_STORE_HOURS	Calculates opening hours for each store. If opening hours is changed this job must be run
M_UPDATE_TRIGGERS	This job updates the mobile triggers (Member Offer Trigger table). It calculates new triggers and updates the existing ones. This must be run on regular basis to make changes available to the Mobile application.

**3.4 Web Services used for Mobile Loyalty**

The following web services have been implemented for the Mobile Loyalty system. They can also be used by other systems or functions:

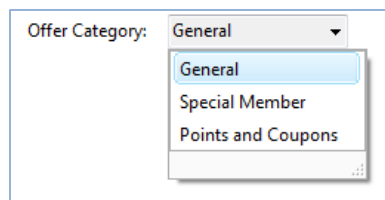
Request ID	Description	Web Request is Active
MM_MOBILE_CONTACT_CREATE	Mobile Contact Create	Yes
MM_MOBILE_CONTACT_UPDATE	Mobile Contact Update	Yes
MM_MOBILE_CREATE_DEVICE_USER	Mobile User Device Create	Yes
MM_MOBILE_GET_ITEMS_IN_STOCK	Mobile Get Items per Store in Stock	Yes
MM_MOBILE_GET_PROFILES	Mobile Get Attribute Setup	Yes
MM_MOBILE_LOGON	Mobile Logon	Yes
MM_MOBILE_PWD_CHANGE	Mobile Password Change	Yes
MM_MOBILE_PWD_RESET	Mobile Password Reset	Yes
MM_MOBILE_CARD_TO_CONTACT	Link Membership Card to Contact	Yes

This information is available in the **Cronus LS Demo Company**.

### 3.5 Types of Offers

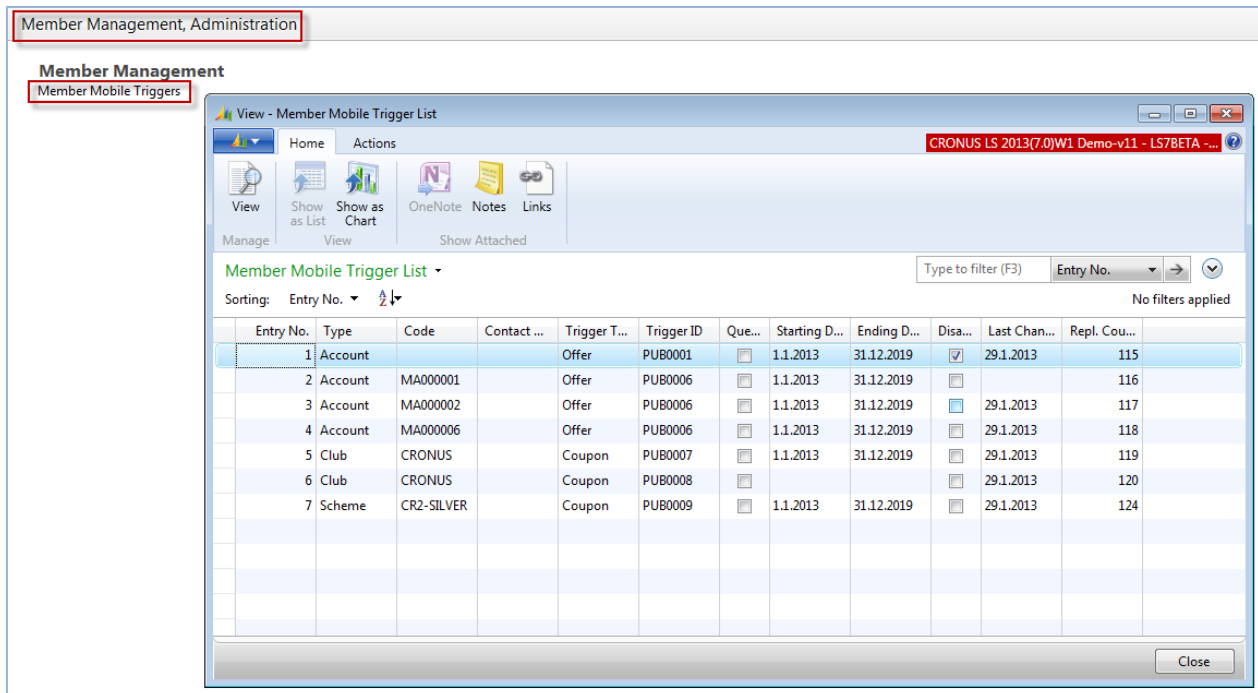
The different types of offers, the General offers and the Specific offers have different purposes.

- **General Offers** are offers that are not aimed at a specific group or individuals. They can for instance be promotions for a new product or an offer valid for a very limited time to attract more people to a certain store at some given time or for a given reason.
- **Specific Offers** are always aimed at a special group. It can be aimed at a special:
  - Club
  - Scheme
  - Account
  - Contact
- **Points and Coupons.**



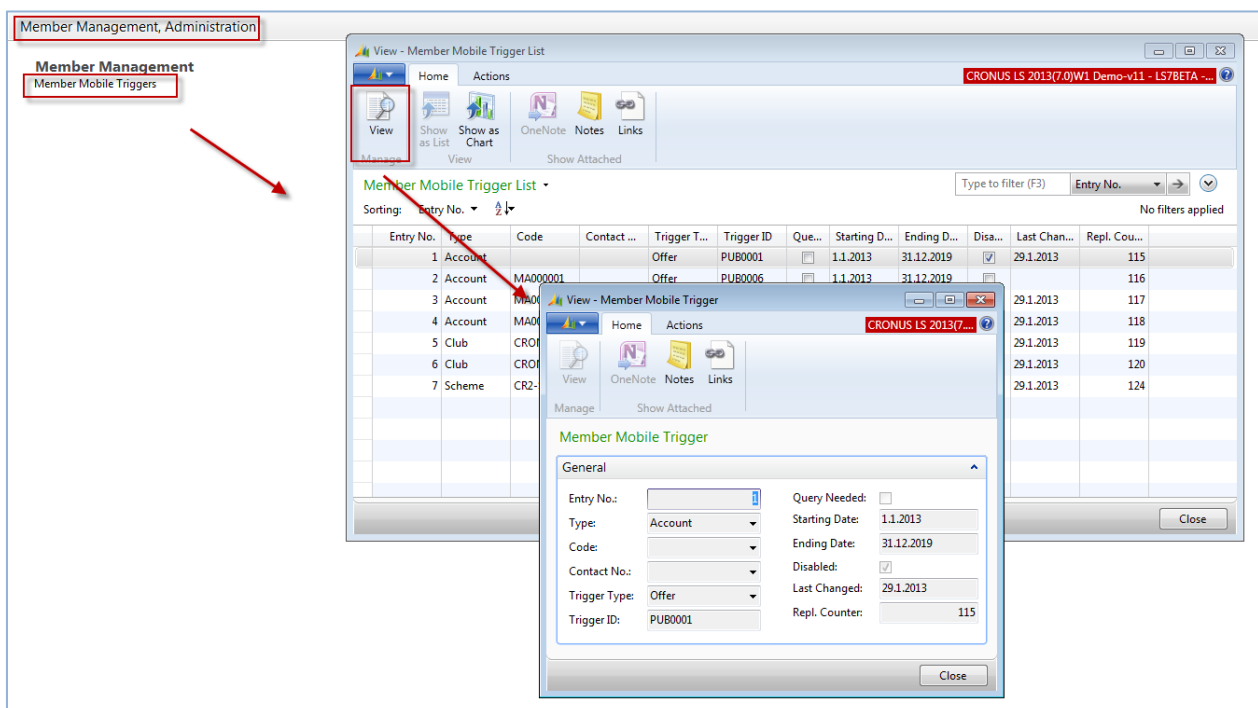
### 3.6 Mobile Trigger List

The Mobile Trigger list created by the M\_UPDATE\_TRIGGERS Scheduler Job, can be viewed at **LS Retail – Member Mgmt, Administration Member Management, Member Mobile Triggers**.



The Job can be run by selecting **Actions/Update Triggers**.

By clicking a selected trigger each of them can be viewed in details.

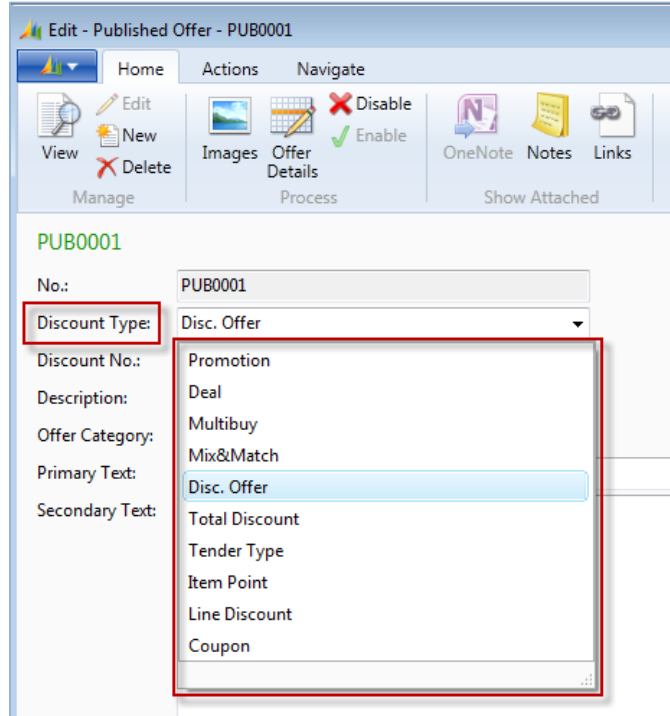


## 4 Setting up Mobile Loyalty

Since all offers can become Published Offers these offers are set up the same way as offers are normally set up within the LS Retail NAV. With the Published Offer Card an offer can be registered as a Public Offer. It is actually linked to any type of normal offer and text information and pictures can be added.

The following list gives an overview of the offers and coupons that are now in use and all of them can be a part of Published Offers:

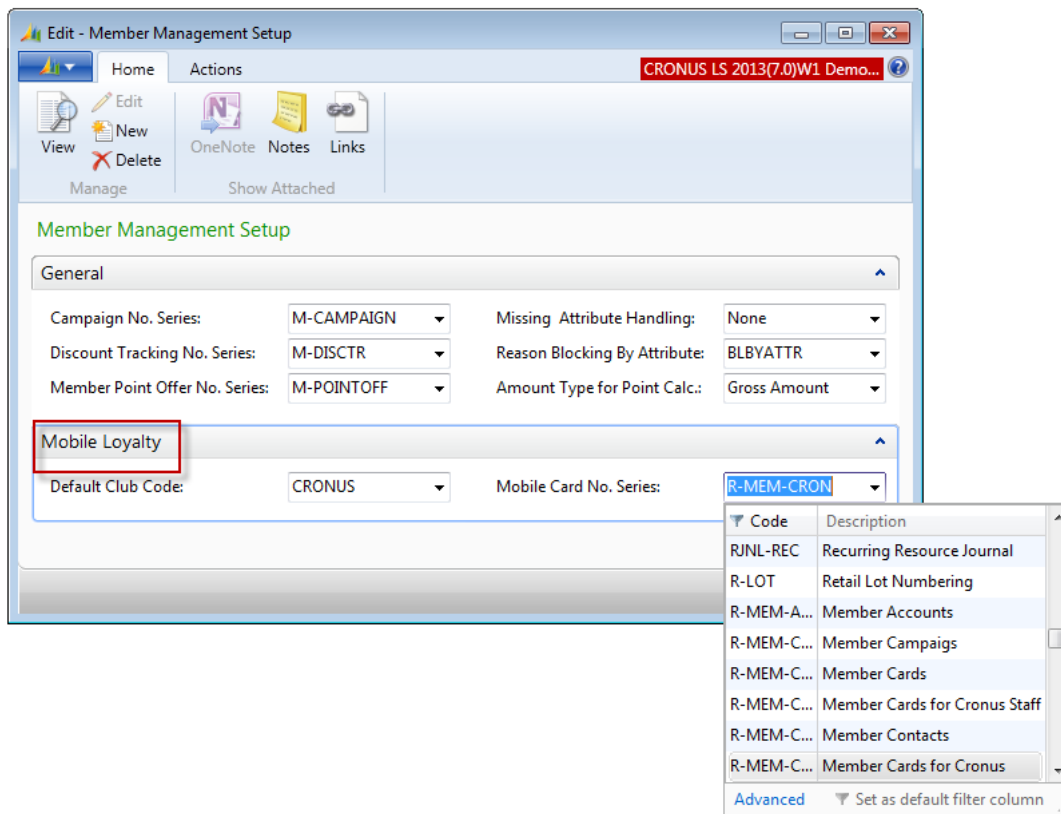
- **Promotion.** Temporary price change
- **Deal.** Offers sold at special price
- **Multibuy.** Discount triggered by quantity sold
- **Mix & Match.** Complex item combinations to give a discount or deal price
- **Disc. Offer.** Appears as discount from regular price
- **Total Discount.** Discount dependent of the total sales amount
- **Tender Type Discount.** Discount dependent of the Tender Type used as payment
- **Item Point.** Price can be paid partly by using member points
- **Line Discount.** Line Discount applied automatically or on user demand
- **Coupon.** Using store coupon for discount or as a part of payment





In the Member Management Setup there are new fields where Mobile Loyalty can be set up or edited.

## LS Retail – Member Mgmt, Setup, Administration, Member Management Setup



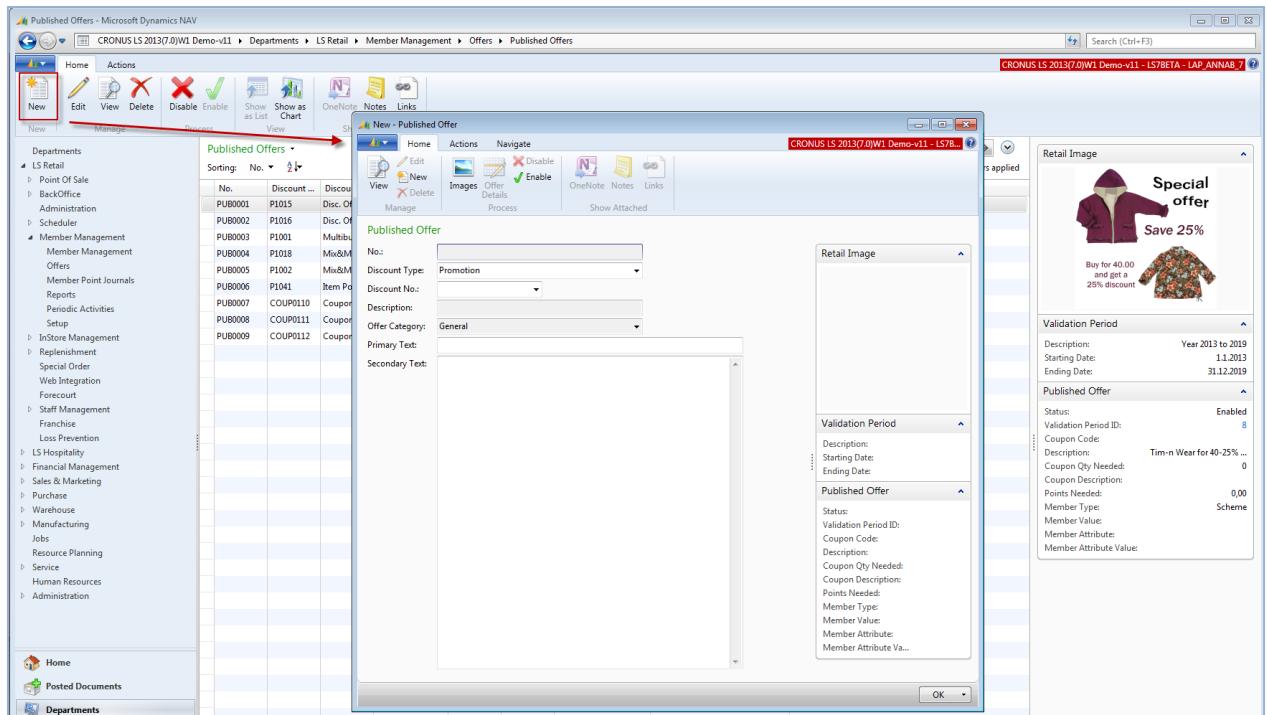
Code	Description
RJNL-REC	Recurring Resource Journal
R-LOT	Retail Lot Numbering
R-MEM-A...	Member Accounts
R-MEM-C...	Member Campaigns
R-MEM-C...	Member Cards
R-MEM-C...	Member Cards for Cronus Staff
R-MEM-C...	Member Contacts
R-MEM-C...	Member Cards for Cronus

If you want to know which cards are created by mobile devices you can have a separate number series for them set here. If not you can specify the same number series as for other Membership Cards (Club or Scheme series).

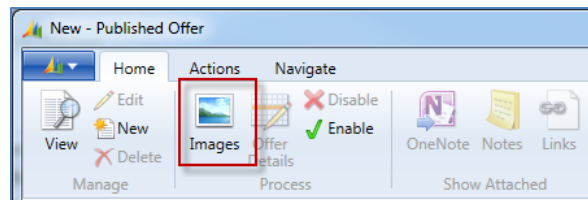
### 4.1 Creating a Published Offer

Creating a published offer (chosen from available offers or coupons) is mostly done through the same procedure. Here is an example:

1. Open **LS Retail – Member Management, Offers, Lists, Published Offers** and select the button **New**.



2. Select Discount Type and Discount Number. Only offers and coupons that have already been created can be selected.
3. Primary (short) and Secondary (long) text and an image (**Image** button) should then be added to the Published Offer which will then be displayed as additional information on the mobile device. Other details can be added as well as more images. This can be useful for showing an item from more than one site for example.

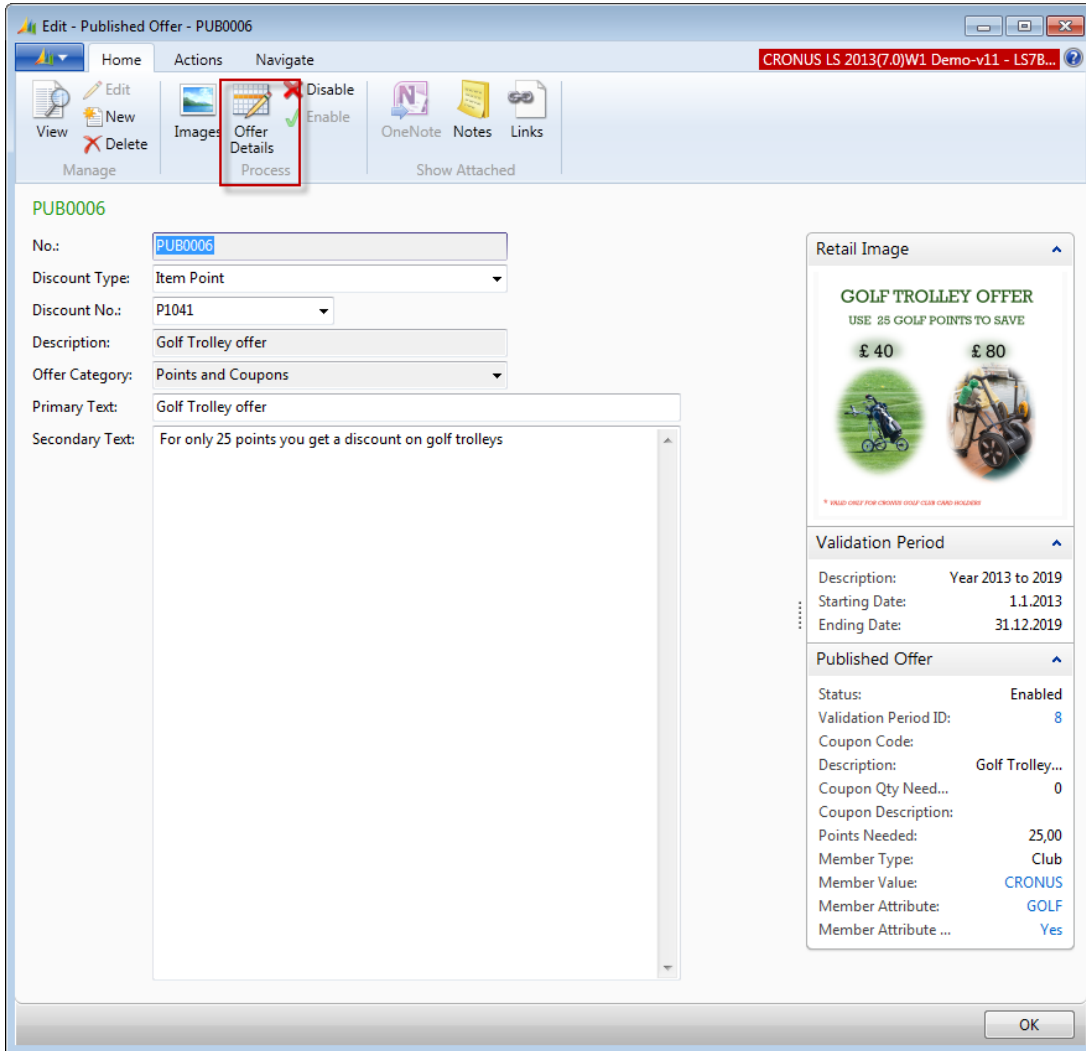


4. Enable the Published Offer by pressing Action Enable.



**Images** are stored at separate location to serve as an **Image Library** for the entire system. Documentation for this functionality will be created.

For more details the correspondent button is used. This can be text or extra images showing the item in the offer for instance from different sides. On the right hand side the Published Offer Factbox will be visible and there the information about the offer, copied from the original offer/deal can be viewed.



**Edit - Published Offer - PUB0006**

CRONUS LS 2013(7.0)W1 Demo-v11 - LS7B...

Home Actions Navigate

View Edit New Delete Manage Images Offer Details Process Disable Enable OneNote Notes Links Show Attached

**PUB0006**

No.: PUB0006

Discount Type: Item Point

Discount No.: P1041

Description: Golf Trolley offer

Offer Category: Points and Coupons

Primary Text: Golf Trolley offer

Secondary Text: For only 25 points you get a discount on golf trolleys

**Retail Image**

**GOLF TROLLEY OFFER**  
USE 25 GOLF POINTS TO SAVE

£ 40 £ 80

**Validation Period**

Description: Year 2013 to 2019

Starting Date: 1.1.2013

Ending Date: 31.12.2019

**Published Offer**

Status: Enabled

Validation Period ID: 8

Coupon Code:

Description: Golf Trolley...

Coupon Qty Need...: 0

Coupon Description:

Points Needed: 25,00

Member Type: Club

Member Value: CRONUS

Member Attribute: GOLF

Member Attribute ...: Yes

OK

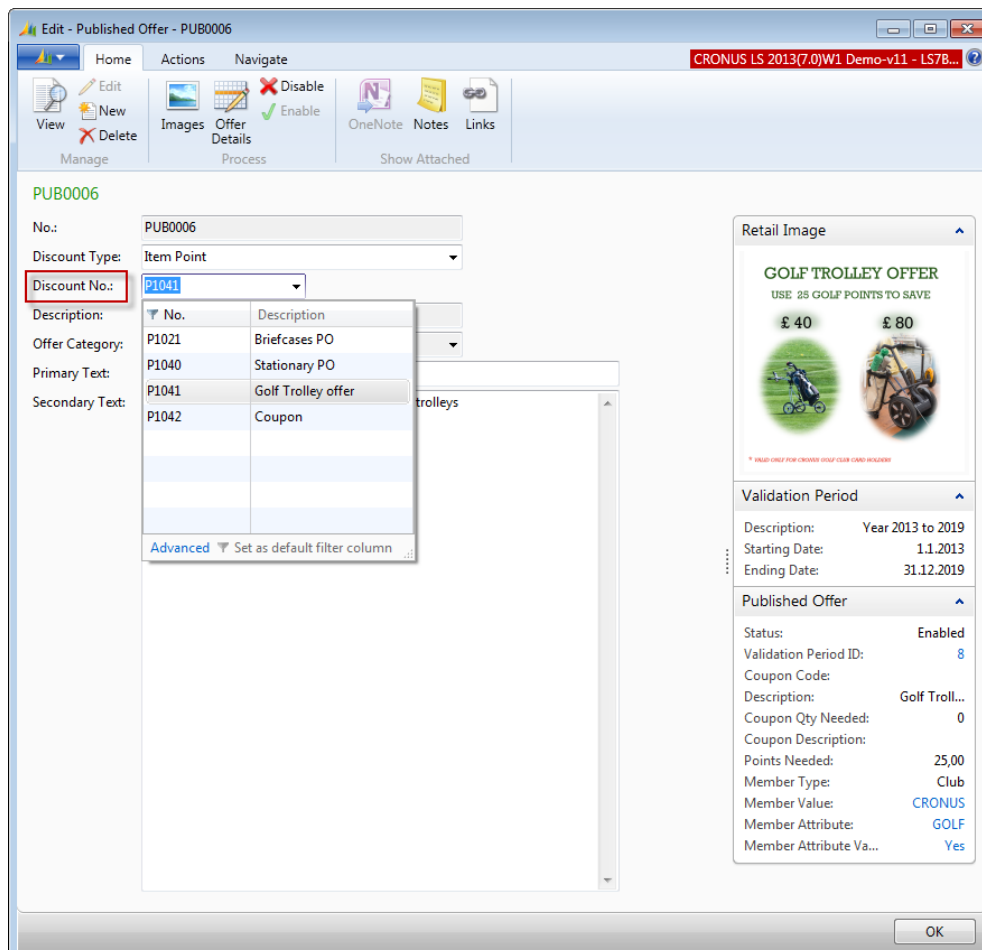
**Example:****Connect an Item Point Offer to Published Offer:**

1. Select Discount Type = Item Point and select between Item Point Offers in the Discount No. field.



Published Offers ▾								
Sorting: No. ▾ A-Z ▾								
No.	Discount ...	Discount ...	Description	Status	Offer Cat...	Primary Text	Secondary Text	
PUB0001	P1015	Disc. Offer	Tim-n Wear for ...	Enabled	General	Tim-n Wear for 40-25...	Unbelievable savings on new arriv...	
PUB0002	P1016	Disc. Offer	DAVI-LINE-10% ...	Enabled	General	DAVI-LINE-10% off	10% off selected DAVI-LINE mens...	
PUB0003	P1001	Multibuy	Multibuy - 5 - 5 ...	Disabled	General	Multibuy - up to 15% ...	Office supplies, buy 5 for 5% off, ...	
PUB0004	P1018	Mix&Match	Buy 1 Scarf&2-4 ...	Disabled	General	30% off on Scarf and ...	30% discount when you buy 1 sca...	
PUB0005	P1002	Mix&Match	Beach Combo - ...	Enabled	General	Beach Combo - 20%	20% off swimsuit and skirt or swi...	
PUB0006	P1041	Item Point	Golf Trolley offer	Enabled	Points and...	Golf Trolley offer	For only 25 points you get a disco...	
PUB0007	COUP0110	Coupon	Special Trophy o...	Enabled	Points and...	Special Trophy offer - ...	Great deal on Trophies, both larg...	
PUB0008	COUP0111	Coupon	Dining table(6pe...	Enabled	Points and...	Dining table(6pers) - ...	A great deal on this 6 person dini...	
PUB0009	COUP0112	Coupon	Free MP3 Player	Enabled	Points and...	Free MP3 Player	This offer is for Cronus Silver me...	

- The Published Offers list shows the already existent Published Offers. Each can be edited by double-clicking on them to view them in the editing mode.
- As Discount Type, select: Item Point.
- Find the right Item Point Offer under Discount No. and select it.



**Edit - Published Offer - PUB0006**

CRONUS LS 2013(7.0)W1 Demo-v11 - LS7B...

**PUB0006**

No.: PUB0006

Discount Type: Item Point

Discount No.: P1041

Description: Golf Trolley offer

Offer Category: P1041

Primary Text: Golf Trolley offer

Secondary Text: For only 25 points you get a disco...

**Retail Image**

**GOLF TROLLEY OFFER**

USE 25 GOLF POINTS TO SAVE

£ 40 £ 80

**Validation Period**

Description: Year 2013 to 2019

Starting Date: 1.1.2013

Ending Date: 31.12.2019

**Published Offer**

Status: Enabled

Validation Period ID: 8

Coupon Code: Golf Troll...

Description: Golf Troll...

Coupon Qty Needed: 0

Coupon Description: 25,00

Points Needed: 25,00

Member Type: Club

Member Value: CRONUS

Member Attribute: GOLF

Member Attribute Va... Yes

OK

## Enable/Disable Published Offers:



You can only Enable a Published Offer if the linked Offer is Enabled. If the linked offer is changed from Enabled to Disabled the Published Offer is set as Disabled as well. Disabling an Enabled Published Offer will not affect the status of the linked Offer.



To activate new or modified Published Offers on a Mobile Device the Job or process M\_UPDATE\_TRIGGERS must be run and then the data must be pushed to the Mobile Database by running the Data Replication Job M\_2MOBILE (or M\_2MOBILE\_NORM).

## 4.2 Viewing a List of Published Offers

The list of published offers can be viewed on the same page where they are created, **LS Retail – Member Mgmt, Member Management/Offers, Published Offers**. They can be viewed as a whole or filtered by number, Discount No. and Type or any other of the options given in the headers of the columns on the page.

Published Offers

Sorting: No. 2

Type to filter (F3)No.

No filters applied

No.	Discount ...	Discount ...	Description	Status	Offer Cat...	Primary Text	Secondary Text
PUB0001	P1015	Disc. Offer	Tim-n Wear for ...	Enabled	General	Tim-n Wear for 40-25...	Unbelievable savings on new arriv...
PUB0002	P1016	Disc. Offer	DAVI-LINE-10% ...	Enabled	General	DAVI-LINE-10% off	10% off selected DAVI-LINE mens...
PUB0003	P1001	Multibuy	Multibuy - 5 - 5 ...	Disabled	General	Multibuy - up to 15% ...	Office supplies, buy 5 for 5% off, ...
PUB0004	P1018	Mix&Match	Buy 1 Scarf&2-4 ...	Disabled	General	30% off on Scarf and ...	30% discount when you buy 1 sca...
PUB0005	P1002	Mix&Match	Beach Combo - ...	Enabled	General	Beach Combo - 20%	20% off swimsuit and skirt or swi...
PUB0006	P1041	Item Point	Golf Trolley offer	Enabled	Points and...	Golf Trolley offer	For only 25 points you get a disco...
PUB0007	COUP0110	Coupon	Special Trophy o...	Enabled	Points and...	Special Trophy offer - ...	Great deal on Trophies, both larg...
PUB0008	COUP0111	Coupon	Dining table(6pe...	Enabled	Points and...	Dining table(6pers) - ...	A great deal on this 6 person dini...
PUB0009	COUP0112	Coupon	Free MP3 Player	Enabled	Points and...	Free MP3 Player	This offer is for Cronus Silver me...

Retain Image

GOLF TROLLEY OFFER

USE 25 GOLF POINTS TO SAVE

£ 40

£ 80

\* MUST ONLY FOR CROWN SHOP CLUB CARD HOLDERS

Validation Period

Description:

Year 2013 to 2019

Starting Date:


1.1.2013

Ending Date:

31.12.2019

**Retail Image**

**GOLF TROLLEY OFFER**  
 USE 25 GOLF POINTS TO SAVE  
 £ 40      £ 80



\* VALID ONLY FOR CROWN GOLF CLUB (CROWN)

**Validation Period**

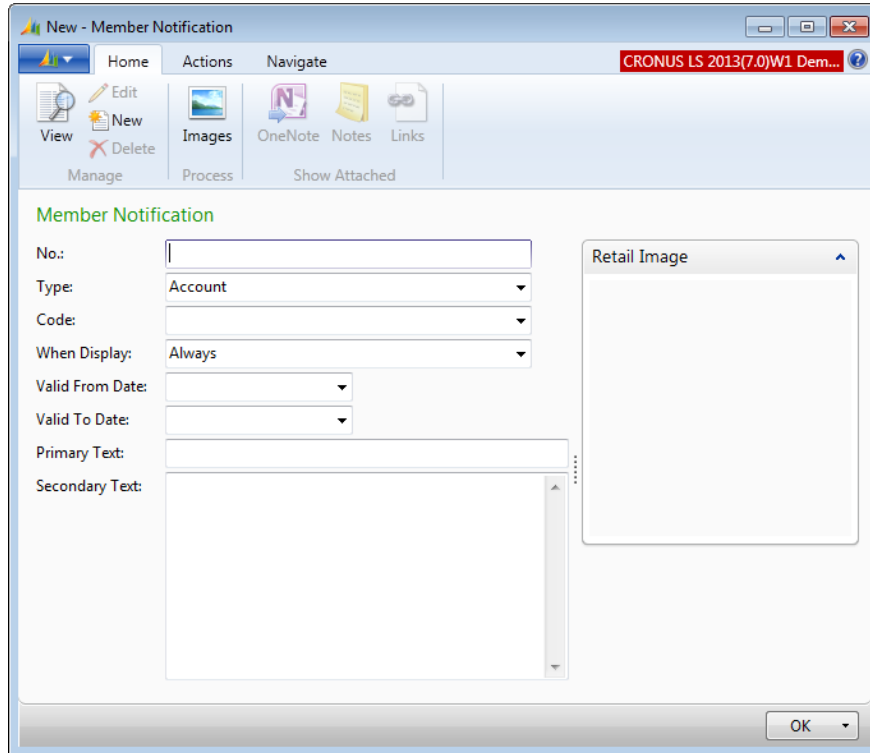
Description: Year 2013 to 2019  
 Starting Date: 1.1.2013  
 Ending Date: 31.12.2019

## 4.3 Member Notifications

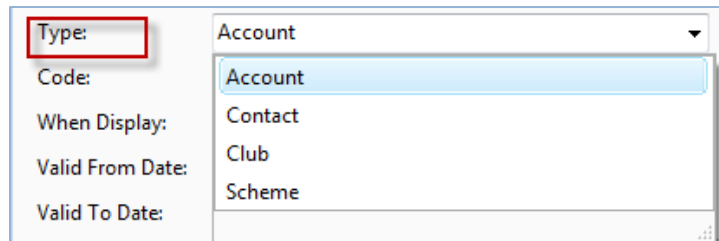
It is possible to publish notifications to members from the system. These notifications are managed from the **LS Retail – Member Management, Lists, Member Notifications** menu.

A list of Member Notifications is displayed.

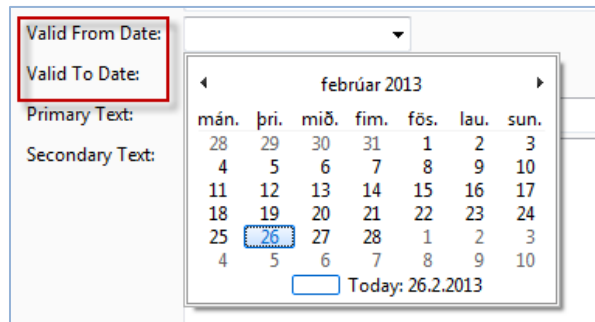
To create a new Notification press action **New**. A Member Notification card is displayed:



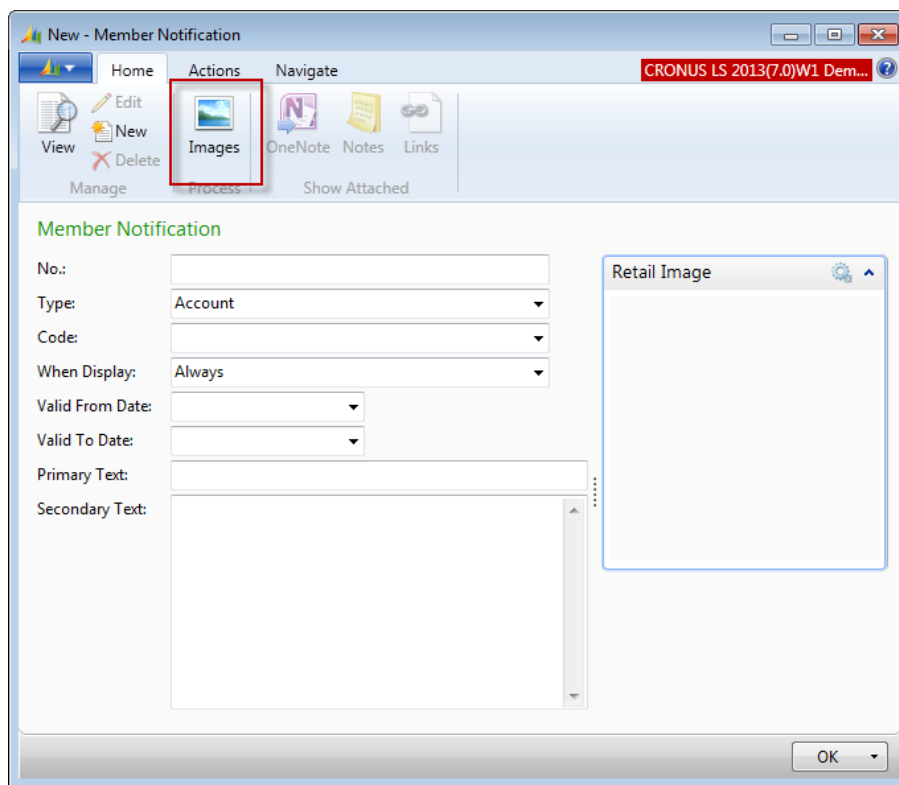
1. Select the Type of notification you want to send. The options are: **Account**, **Contact**, **Club** and **Scheme**.



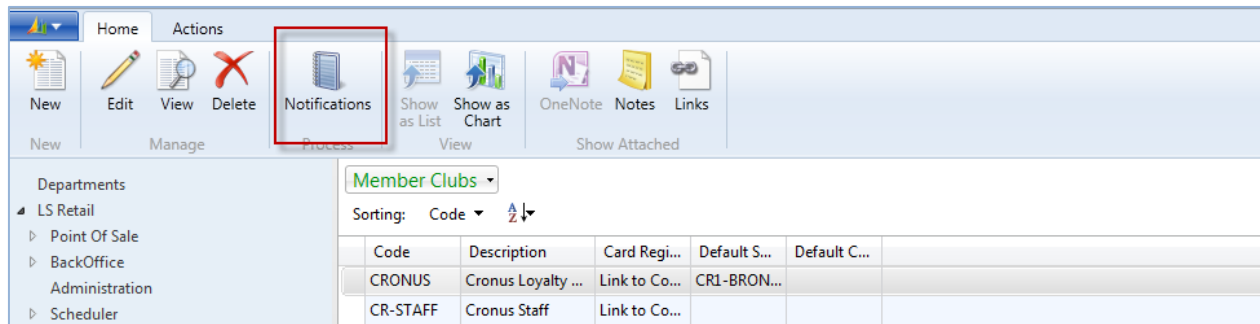
- The Notification will be visible to the Member Contacts (or single contact) that you specify.
2. Select **Code**.
  3. Select **When to Display**. The options are: **Always** and **Once**.
  4. Select validation period, **Valid From Date** and **Valid To Date**. It can be selected from a calendar.



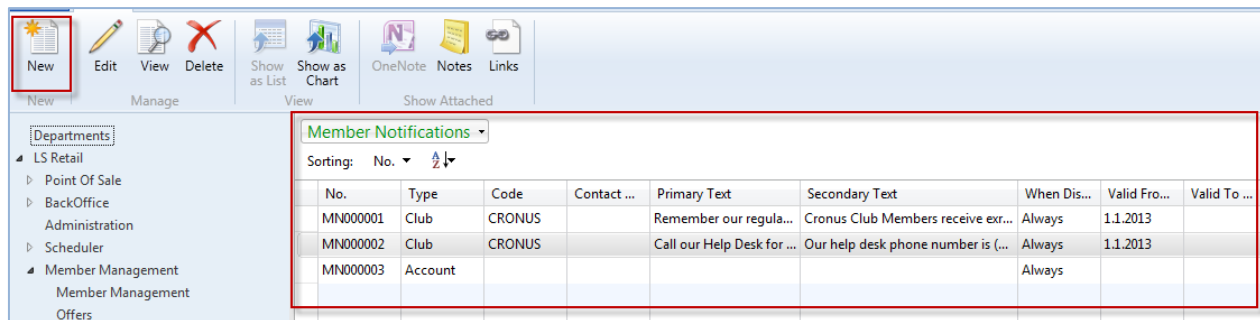
5. For **Primary Text** and **Secondary Text** enter text as needed.
6. Add an Image from the Image Library by selecting the **Image** button.



Notifications can also be viewed from the Member Club List or Card by pressing the **Notifications** button:



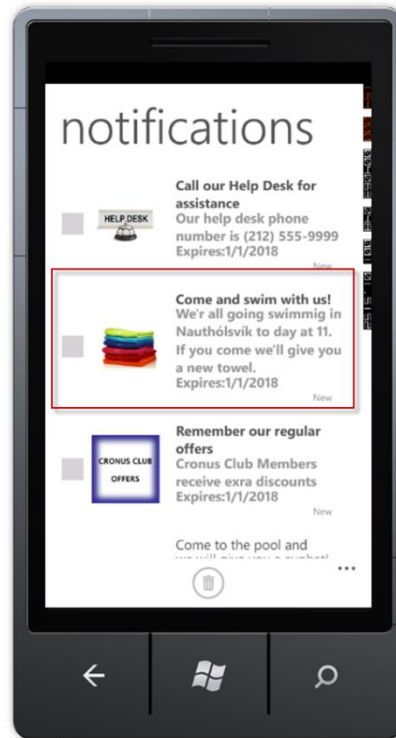
A list of Notifications for the selected Member Club will be displayed:



From here you can edit a Notification or create new. Notification can also be manipulated the same way directly from the Member Schemes, Member Accounts and Member Contacts lists and cards.

To activate new and modified Notifications on the Mobile Devices the M\_2MOBILE (or M\_2MOBILE\_NORM) Job must be run.

Once the notification has been sent to the phone it appears there under **Notifications**.

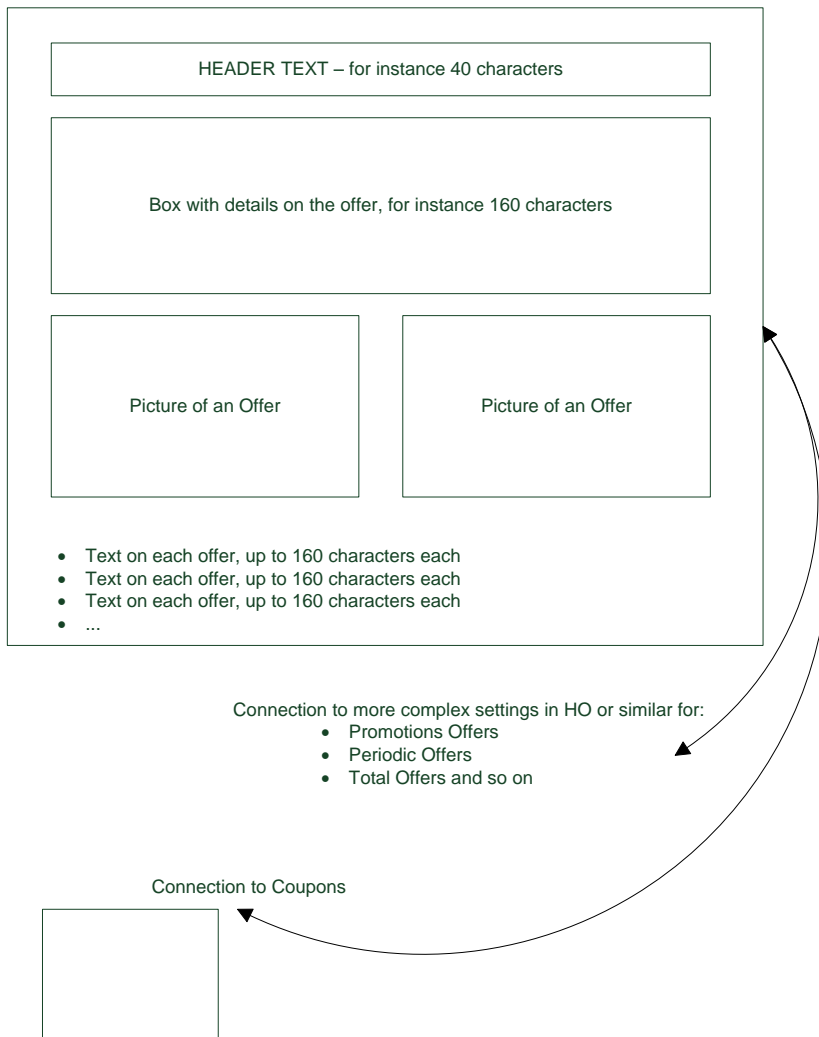


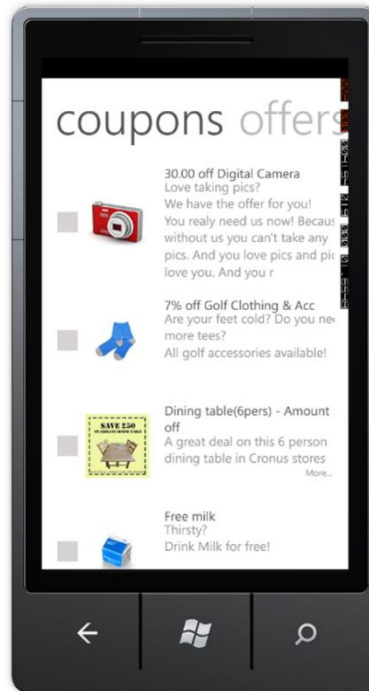
## 5 Displaying Offers

The main issue when it comes to Published Offers is to display the offers in as simple way as possible. Behind the scenes there may be connections with several types of offers and coupon activity but what the user sees is a simplified view that consists most often of:

- Header
- Text to describe the offer
- Details on the offer's components
- Picture showing the offer/s

There can be several ways to view the offer, for instance on a smartphone or a webpage but a likely way to display an offer could be like this:





As soon as an offer is filtered it becomes specific.

A simple example of a general offer is 10% discount given on a certain day at a certain store. Specific offers are more complicated and may for instance be linked to attributes in the customer's profile. This gives several options in the future releases. For instance he or she may be a golf enthusiast, thus getting all golf offers, get a special offer on his or hers birthday another aimed at people aged 40-60 years or get a special gender based offer. More information on different offers is in the chapter on Using Offers.



## 6 Using Offers

### 6.1 Getting Offers

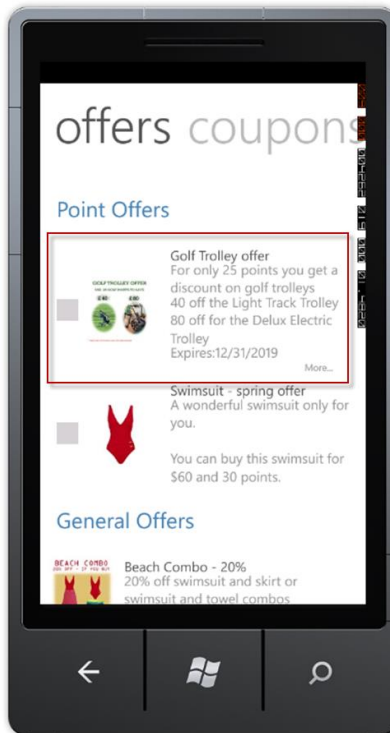
The offers are always pushed to the customer. Each customer can have several offers sent to him to a smartphone. General offers sent to everyone and specific offers aimed at his/hers interest, club, scheme or some attribute in his or hers account, such as age, gender or income will be a part of the future releases. The customer will only see the offers valid for him/her. Thus a member in a silver scheme will not see the offers aimed at the gold members and vice versa. The offers will all look similar in the customer's smartphone/device even though some may be based on usage of points or coupons and others mix and match offers, to name a few.

The customer can in advance decide which offers he or she wants to use. Offers that earlier where activated by prompting a salesperson on the POS to ask a customer whether he or she had a coupon or wanted to use some points as a part of a payment can now be studied, compared and selected wherever the customer chooses.

### 6.2 When the Customer Needs to Activate an Offer

Some of the offers require active action on the customer's behalf. These include the following:

- When the customers have to decide whether they want to use points to activate an offer



- When the customers have to decide whether they want to use a coupon

### 6.3 Different kind of Offers and Offers that look identical

The customer can have similar offers displayed and in some cases different offers can look identical for him or her. An example could be one that has the attribute golf linked to his or hers account. The following offers might be available:

1. Golf set for 400 Euros and 20.000 points. This is an Item Point Offer, but the customer is only seeing it as an offer that allows him or her to use points.
2. Golf set for 150 Euros and 50.000 points. The same applies to this offer as the first one, in the background it is an Item Point Offer.
3. Golf set for 400 Euros and a coupon that is valid for 20.000 points. This offer is in fact identical to the first offer but allows the customer to use a coupon instead of using earned points.
4. If the customer buys a golf set and a golf trolley together he or she will earn 1000 points and get 10% discount. This can be done as a Mix & Match offer.
5. Offer that displays 6 different items for golfers. If the customer buys any 3 of those he or she will only pay for two of them (the two more expensive ones). This is a Mix and Match offer but the customer only sees the header, picture, text and details on the items that the offer covers.

6. Coupon that gives 30 Euros discount on all golf items except golf sets if the user buys for 300 Euros or more. In this case the coupon is used plainly as a coupon. The coupon is sent to the customer's smartphone but an earlier version would have been that the customer went to a kiosk to pick up such a coupon or had it sent by mail or found it in a magazine.

Whenever points are used a transaction is booked in the system but what the customer sees is just that the number of the points used is deducted from the number of the points he or she sees as a number in the smartphone or similar equipment.

## 6.4 Points and Coupons Updated

When the customer has used some points and coupons, gained more points by purchasing some goods or the point and coupon status has changed in some other way the status will be updated in his or hers smartphone/device. For mobile phones this will happen on the mobile side where information is pulled on regular basis from the LS Retail NAV. This may for instance happen every 30 minutes. The update will also take place every time the mobile user logs in again to the mobile loyalty system.

## 7 Use Case

### 7.1 Offers for Middle-Aged Golf Enthusiasts

A customer is a member of the Cronus club and has earned membership in the silver scheme of the club. She is aged 45, a golf player and her income is reasonably over the average. On the club's website in her private account she has found out that she can earn points and get discounts, coupons and offers by marking a checkbox for golf enthusiasts.

She is in a large department store taking a look at the offers and coupons she has stored in her smartphone. She finds that she has 14 offers and coupons and she has to activate some of them if she wants to use them. What she does not know is that the origin of the offers is of different kind. They are all displayed in the same manner with a header, text, picture and details of the items included in the offer, fitting perfectly on the smartphone screen.

The origins of the offers are:

Club:	4 offers for the members in the Cronus Club
Scheme:	2 offers for the silver scheme
Account:	4 offers based on the information and choices she has made in her account
General:	4 offers sent to everyone that fulfill certain criteria

When she selects an offer for golf set paying 200 Euros and 40.000 points this offer is a product of her marking the golf checkbox with a "yes". Other criteria such as age or income have no effect on the fact that she gets the offer. However, if she had not marked the checkbox for golf fans, she would get the same offer because of her age and income in a campaign that is being launched for middle aged above average income people that are seen as a feasible group to be encouraged to take up golf.