Merchandise Manager 5.0.0.1001 LOYALTY PLANS

Loyalty Plans allow your customers to receive discounts or free products after they purchase a specific number of a product or spend over a specific amount of money at your store.

Loyalty Plans Setup:

Double Click the Merchandise Manager Back office Icon from the center of your desktop.



Select your company name and System Manager as the login user. Manager has special privileges. Enter a password if needed and click Log In.

	Company		
	Bazetta Mall		
•	CRUISE		
	Demo Company		
	Mamula's Mini Mart		
	Mamula's Mini Mart		
			_
	User Name		
*	SYSTEM MANAGER		
	User 1		
	John Public		

Wain Menu

 Image: Point of Sale
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 Merchandise Manager
 CRUISE

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 Utilities
 Utilities
 Utilities

iles	Inventory Point of	Sale Utilities Management D	ashboard
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	Loyalty (SQL)	Loyalty (Access)	
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Select Loyalty Plans from the Loyalty Menu

The grid on the right side of the screen will show any existing Loyalty Plans that have been created. Double click a plan to display it on the left side of the screen where it can be edited.

🛃 Loyalty Plan Setup							-
Description		_	1			1	
Description.			Description	Start Date	End Date	Туре	Purchase \$
Plan Type:	~		Contains: 🌱	Equals: 🛛 🍸	Equals: 🛛 🍸	Equals: 🍸	Equals: 🌱
		+	Coffee Disc	Date 1/1/2024	Date 1/31/2024	1	100.00
			Candy Discount	Date 1/1/2024	Date 1/31/2024	2	0.00
Starts 🗸			Mix Type Reward	Date 1/1/2024	Date 2/29/2024	4	0.00
	Save		Points Test	Date 1/1/2024	Date 2/29/2024	3	50.00
			Half Off Coffee	Date 1/1/2024	Date 2/29/2024	2	0.00
Maximum times this reward can be used	~~						
	Cancel						
	Delete						
Item # to Purchase	Search						
Qty required to purchase for reward							

To create a new Loyalty Plan, Enter a description in the Description box.

Select the type of Loyalty Plan from the Plan Type drop down.

Description:	My Test Plan
lan Type:	
	1 - Purchase \$\$\$ and Receive an Item for a not of list
	i dicinado e e ana receivo antiennoi a per orna.
	 Purchase ## of an item and Receive an Item for a pct of list. Purchase \$\$\$ or ## of an item and Accumulate Points
Starts	2 - Purchase ## of an item and Receive an Item for a pct of list. 3 - Purchase \$\$\$ or ## of an item and Accumulate Points. 4 - Purchase ## of a Mix/Match and Receive a Pct of the Mix Price.

Type 1 Purchase \$\$\$ and Receive an Item for a pct of list – Customer will receive a product for free or for a percent of the list price after they spend a specific amount of money at your store.

🖳 Loyalty Pla	n Setup			
Description:	My Test Plan			
Plan Type:	1 1 - Purchase \$	\$\$\$ and Receive a	in Item for a pct of	list.
Starts Ends	1/1/2024 ~ 3/31/2024 ~	•		Save
Maximum tir	nes this reward can be use in Sales to receive plan	d	100 100.00	Add Cancel Delete
Item # to re	deem reward			Search
Qty to Rec	eive each redemption	1	Pct of Price:	0 %

Enter the dates that this plan will start and end.

Enter how many times a customer redeem this reward.

Enter the Amount of money the customer must spend to receive the reward.

Next determine the product the customer will receive. Pressing Search will allow you to search your inventory and select the product. Use the normal filtering to search for specific product.

	Loyalty Plan Setup						
visual Studio WinSC	Description: My Test Plan			1	Description	Start Date	End Date
	Plan Type: 1 1 - Purchase \$\$\$ and Receive a	an Item for a pct of list.	~	Contains:	Y	Equals: 🕎	Equals:
DWV				Coffee Di	sc	Date 1/1/2024	Date 1/31/2024
	7			Candy Dis	scount	Date 1/1/2024	Date 1/31/2024
Sage Prices.	State 1/1/2024			Mix Type	Reward	Date 1/1/2024	Date 2/29/2024
usinessWo	1/1/2024		Save	Points Te	st	Date 1/1/2024	Date 2/29/2024
	Ends 3/31/2024 ~			Half Off C	offee	Date 1/1/2024	Date 2/29/2024
<u> </u>	Maximum times this second and be used		Add				
Brother Sun Oct 2	Maximum times this reward can be used	100	Count				
Utilities 12 49 ED	Total Dollars in Sales to receive plan	100.00	Carte			2	
💀 PO Item Search				-	\Box \times		
item_No	Description	VendorName	QUM	InactiveItem	LastCost		
⊘Contains: ♥C	Contains: Reeses	Y Contains:	Y Equals:	7 9 7	Equals: 🛛		
034000002481 F	REESES PIECES			18			
034000116416 r	reeses pieces			0			
034000432905 r	reeses miniature cup			•			
034000470563 m	reeses mini unwrapped			•			
041000214899 n	reeses peanut better ICE CREAM			•			
				Clear Sele	Exit		
HP Lasardati Projejre							Exit

Double click the item or press Select to use that item in the loyalty plan.

🖳 Loyalty Pla	in Setup			
Description:	My Test Plan			
Plan Type:	1 1 - Purchas	e \$\$\$ and Receive	an Item for a pct of I	ist. ~
Starts	1/1/2024	~		
Ends	3/31/2024	~		Save
Maximum tir	mes this reward can be	used	100	Add
Total Dollars	s in Sales to receive pla	an	100.00	Delete
Item # to re	edeem reward	034000002481		Search
Qty to Rec	ceive each redemption	1	Pct of Price:	100 %

Enter how many of the product the customer will receive in the Qty to Receive each redemption field.

Enter the Pct of Price. NOTE: 0% means the product will be free.

Type 2 Purchase ## of an item and Receive an Item for a pct of list – Customer will receive a product for free or for a percent of the list price after they purchase a specified number of the same or another product.

	seruh
Description:	My Test Plan
Plan Type:	Purchase \$\$\$ and Receive an Item for a pct of list. Purchase ## of an item and Receive an Item for a pct of list. Durchase \$\$\$ at ## of an item and Receive an Item for a pct of list.
Starts	4 - Purchase \$\$\$ or ## of an item and Accumulate Points. 4 - Purchase ## of a Mix/Match and Receive a Pct of the Mix Price
Ends	Save

🖳 Loyalty Pla	in Setup					
Description:	My Test P	lan				
Plan Type:	2 2 - Pu	rchase #	# of an item ar	id Receive an It	em for	a pct of list. $$
Starts	1/1/2024					
Ends	3/31/2024					Save
Maximum tir	by big my and or					Add
Maximum u	nes uns reward ca	an be used		100		Cancel
						Delete
Item # to P	urchase	034000	002481			Search
	REESES	PIECES			_	
Qty require	ed to purchase for	reward		10		
						Count
item # to re	Item NOT O	N FILE				Galdi
Qty to Rec	ceive each redem	ption	1	Pct of Pri	ce:	%

Enter the dates that this plan will start and end.

Enter how many times a customer redeem this reward.

Enter the Item # to purchase. Use the Search button to look for and filter the inventory.

Enter how many of this product the customer must purchase to receive the reward. (ex: 10)

Next determine the product the customer will receive. Pressing Search will allow you to search your inventory and select the product. Use the normal filtering to search for specific product.

•	PO Item Search				_		\times
	ltem_No	Description	VendorName	QUM	InactiveItem	LastCost	
0	Contains: 🛛 🖓	Contains: Reeses Y	Contains: 🌱	Equals: 🛛 🖓	🔲 🍸	Equals:	7
	034000002481	REESES PIECES		18			
	034000116416	reeses pieces		0			
	034000432905	reeses miniature cup		0			
	034000470563	reeses mini unwrapped		0			
	041000214899	reeses peanut better ICE CREAM		0			
	815216016703	CLASSIC COOKIE REESES	BMH DISTIBUTING	8			
				Clea	ar	Exit	
					Sele	ct	

- Lovalty Plan Setun			
Coyarty Han Setup			
Description: My Test Pla	an		
Plan Type: 2 2 - Pure	chase ## of an item and	Receive an Item for	a pct of list.
Starts 1/1/2024			
5.1			Save
Ends 3/31/2024			A44
Maximum times this reward ca	n be used	100	
			Cancel
			Delete
item #to Purchase	034000002481		Search
REESES F	PIECES		
Qty required to purchase for	reward	10	
		10	
Item #to redeem reward	034000002481		Search
REESES PIL	ECES		
Qty to Receive each redemp	tion 1	Pct of Price:	100 %

Enter how many of the product the customer will receive in the Qty to Receive each redemption field.

Enter the Pct of Price. NOTE: 0% means the product will be free.

Type 3 Purchase \$\$\$ or ## of an item and Accumulate Points (Future Use)



Type 4 Purchase ## of a Mix/Match and Receive a Pct of the Mix Price



escription:	My Test Plan				
lan Type:	4 - Purchase ## of	a Mix/Matc	n and Receive a	Pct of the	Mix Price.
Starts Fods	1/1/2024 ×				Save
Maximum ti	mes this reward can be used		100		Add Cancel
					Delete
Mix Match	Code to Purchase				Search
	ed to purchase for reward	1		Price:	
Qty requir					

Enter the dates that this plan will start and end.

Enter how many times a customer redeem this reward.

Enter the Mix/Match code that will need purchased. Use the Search button to look for and filter the mix/match items.

🚪 Mix and Match Search

	Code	Description	Price	Group Qty	Group Price
	Equa 🌱	Contains: 🛛	Equals: 🛛 🖓	Equals: 🛛 🖓	Equals: 🛛 🖓
+	1	Candy	0.00	2	1.50
	2	Marlboro Disc	0.00	1	0.15
	3	NO52/4	0.00	2	0.98
	4	2 FOR 2 COOKIES	0.00	2	0.50
	5	MONSTER 2/4	0.00	2	1.14
	6	POWERAIDE	0.00	2	0.88
	8	VASILIOS	0.00	2	0.98
	10	Minute	0.00	2	0.58
	12	JERKY	0.00	2	1.98
	13	SNAPPLE 16OZ	0.00	50	0.88
	15	CANDY	0.00	2	0.38
	16	COPE	0.00	2	1.00
	17	MONSTER MUSCLE	0.00	2	0.98
	18	7UP 20OZ	0.00	50	0.48
	19	BAI	0.00	99	0.78
	20	AQUAFINA	0.00	2	1.18
	•••			-	
				Select	

Double click or press select to use the Mix/Match code.

Enter how many of this Mix/Match the customer must purchase to receive the reward. (ex: 10)

Description: Plan Type: 4 Starts 1/ Ends 3/	My Test Plan 4 - Purchase ## o 1/2024 31/2024 V	of a Mix/M	1atch a	and Receive	a Pct of t	he Mix Prio
Plan Type: 4 Starts 1/ Ends 3/	4 - Purchase ## o 1/2024 31/2024	of a Mix/M	Natch a	and Receive	a Pct of t	he Mix Pric
Starts 1/ Ends 3/	1/2024 31/2024 V					
Starts 1/ Ends 3/	1/2024 ~ 31/2024 ~					
Ends 3/	31/2024 🗸 🗸					Save
Maximum times	this reward can be used			100		Add
						Cancel
						Delete
Mix Match Cod	e to Purchase	1				Search
Candy					Price:	1.50
Qty required to	purchase for reward		10			
Redeem what	percent of the Mix match	Price:		o	%	0.00

Enter the Redeem what percent of the Mix match price. NOTE: 0% means the product will be free.

Redeeming Loyalty Rewards.

From the POS Sale Screen:

歸 User: SYSTEM	MAN Drawer: 1 Custom	ier: Spartan Software	e Balance: \$0.00					- 🗆
Sales man	View Sales Git	t Cards Inve	ntory Credit Cards	Loyalty	Override		18934	Management
Item No	Description	Dies %	Save	Delete	Non Tax Item	Misc Taxable		Slushies
Item No	Description Qty	Price Discou	Void nt UM Am	Cancel	LOYALT	ICE		AGECHE CK
					Save Sale	Retrieve Sale	DEJAVO O	EBT Custom
					Line Discoun	Order Discoun	CC INIT	DRAWE RPOP
Items: 0	Subtotal \$0.00	Tax \$0.00	Discount \$0.00	Total \$0.00		Price L	ookup	
Receipt	Past Receipt Sale	Total	Paid	Change	Comple	te Ca	ancel	Customer

Make sure a customer is used for the sale. Use the Loyalty button, scan a loyalty card or select a customer from the Customer button.

Process sales for that customer.

Sales man	View Sales	Gift C	Cards	Inventory		Credit Cards	Loyalty	٥v
tem No	Des	cription				Save	Delete	
)tv	Price		Disc %			Void	Cancel	
Item No	Description	Qty	Price	Discount	UM	Amount		
034000002481	REESES PIECES	10	1.25	0.00			12.50	

The Loyalty Calculator will run once per day. So the reward will be available the following day.

When a follow up sale is started for that customer, if they have accumulated any rewards, the screen will display:



Press OK and proceed to the sale.

NOTE: the top bar will display a Loyalty button if the customer has any available.

🔛 User: SYSTEM MAN Drawer: 1 Customer: Spartan Software Balance: \$0.00									×
Sales man	View Sales	Gift Cards	Inventory	Credit Cards	Loyalty	Override	18935	Management	

Select the loyalty button to see what is available.

🚽 Loyalty Earned				-	- 0	×
Item No	Description Coffee Disc	Expires 01/31/2024	Price Qty 0.00 1	PC	Selec	t
MIX~6	Mix Type Reward	02/29/2024	25.00 % 1		Selec	t
03400002481	My Test Plan	03/31/2024	0.00 1		UnSele	ect
Loyalty History					Exit	

Note the Loyalty we created is displayed since the customer has purchased 10 of the item.

Click the select button and that item will be moved to the current sale when Exit is pressed.

The discounted price will be used. NOTE: 0% is free.

Item No	Desc	ription			Save	Delete
Otv	Price	ſ	Disc %		Void	Cancel
Item No	Description	Qty	Price	Discount	UM A	mount
▶ 034000002481	REESES PIECES		0.00	0.00		0.00
	Subt	otal	Та	Х	Discount	Total
Items: 1	\$0.00		\$0.00		\$0.00	\$0.00
	Dect Deceint	_				

After the sales is completed. The reward will be removed for that customer until the complete the requirements for another reward.

The Mix/Match reward will require an item with that mix/match already be on the current sale for that customer before the reward can be used.

If there are no items on the sale with that Mix/Match code, the following will display:

