

Rewards System

Visual Retail Plus

POS Software System

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General Overview

VRP Rewards is a loyalty program to reward the customers who shop at the store regularly. It adds the rewards to the customer account for every purchase he/she makes. The rewarded amount is calculated based on the amount spent by the customer. If the customer returns the merchandise he/she purchased, the rewards program deducts the rewarded amount from the customer account. The rewards program also has an option to expire the rewards that were earned prior to a certain date.

- A customer eligible for rewards must first have an account in the *Customer* module of VRP.
- The customer must be marked as a member.
- Rewards are given based on a percentage of each sale made under the customer's name.
- Rewards may be redeemed after a certain amount of rewards is accrued.
- The cashier/manager can manually add or subtract rewards from the customer account.
- Rewards expiration period can be set up to expire the unused rewards earned prior to the set date.

Detailed Process

1. Getting Started

1.1 INI Settings for UseVIP and UseRewards

To start using VRP rewards, INI setting to use VIP points must be set to N and INI setting to use Rewards must be set to Y. To do this, from the Back Office of the VRP home screen, select *Setup* module. Once the Setup module opens, search for UseVIP setting and set its iniValue to N as shown in Figure 1 below. This is done in case if the store used to use VIP system before. Next, move to the Global Setup tab, search for UseRewards setting and set its iniSetup to Y as shown in the Figure 2.

Figure 1

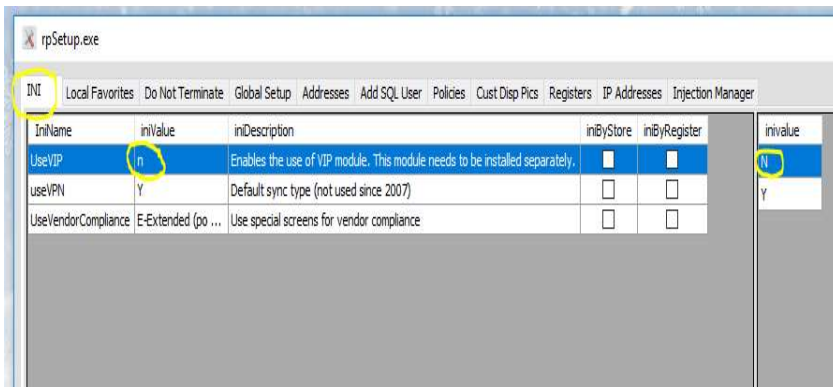


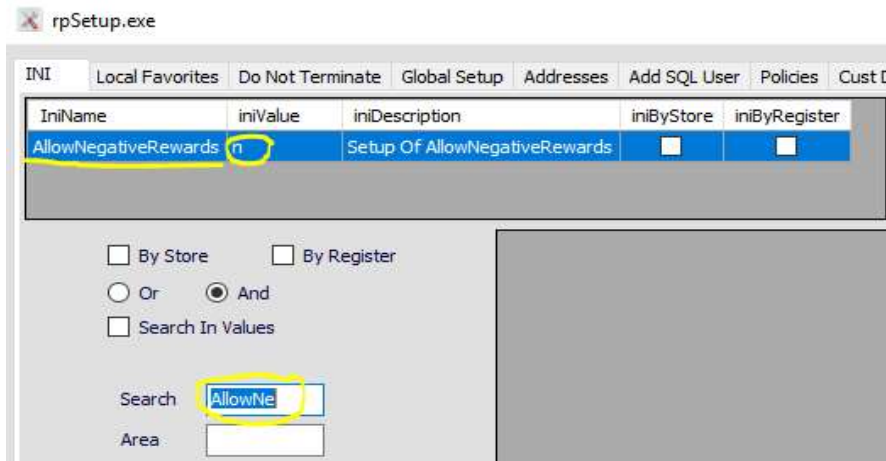
Figure 2



1.2 INI Settings for AllowNegativeRewards

The VRP allows the businesses to decide if the customer is allowed to have a negative Rewards balance. For example, the customer could have earned rewards on the Sale#1 and then redeemed those rewards on the Sale#2. If now the customer will try to return the items from Sale#1 his/her rewards balance will become negative because the customer had already used the rewards earned on this sale. The VRP provides an option for the business to either Allow Negative Balance, in which case customer will owe the money to the business or Don't Allow Negative Balance in which case the system will automatically deduct the amount owed by the customer from the amount he/she receives during return.

Figure 3



For example, on Sale #1 a customer bought \$500 worth of items and earned \$25 in rewards as a result. Customer Rewards Balance at this point is \$25. On Sale #2 the customer bought \$25 worth of items and paid for it with the rewards. Customer Rewards Balance at this point is \$0. Then the customer returns \$500 worth of items that he bought on Sale #1. The system will try to deduct \$25 that he/she earned on the original sale from the customer Rewards Balance. If Negative balance is allowed, the system will prompt the cashier to return \$500 to the customer and set customer Rewards Balance to -\$25. However, if the negative balance is Not allowed, then the system will keep customer Rewards Balance at \$0 and prompt the cashier to return the customer only \$475 instead of \$500.

To set up this preference in the same *Setup* module search for a setting called “AllowNegativeRewards”, as shown in the Figure 3 above and set the iniValue to Y to allow negative balance, or to N to disallow negative balance.

1.3 Setting Rewards brackets

Now, the Reward brackets must be set. From the home screen of VRP, select *POS*. Once the *POS* module opens, select the *Custs* module. It is located at the bottom along with the other tools available in the *POS* module. If it is not immediately visible, select the 'More' button to view the next page of tools. See Figure 4 below for example.

Figure 4



In the *Cust* module select the 'Admin' tab as shown below. Click the 'Admin User Fields' button to reveal the administrator settings. Rewards Brackets similar to the one shown below will open up. Brackets may be edited under the 'Amount' or 'PCT' columns.

Figure 5

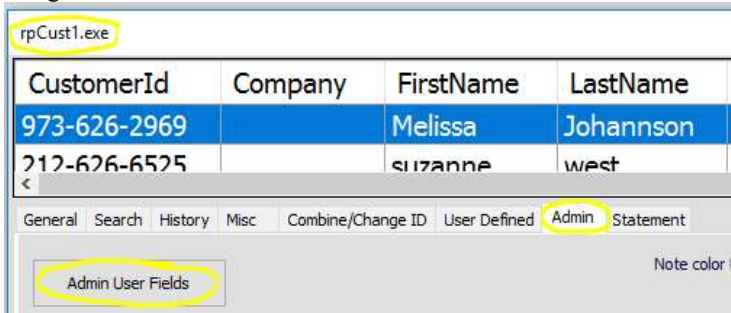
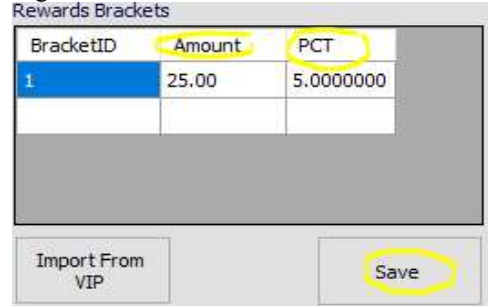


Figure 6



Amount is the minimum threshold level that the customer must reach in order to be able to redeem his/her rewards. The rewards will be redeemed in the increments of Amount. The **PCT** is the percentage the customer is going to earn back on every dollar he/she spends. For example, if the Amount = 25 and PCT = 5, the customer will earn 5% from every purchase he/she makes. For every \$100 the customer spends he/she will earn \$5 in rewards. Then when customer rewards balance reaches \$25 he/she can redeem \$25 towards the next purchase. If the customer has \$49 in rewards he/she can only redeem \$25. Once the customer reaches \$50 (next threshold with the increment of 25), he/she can redeem \$50. Click the save button after completing any changes to keep them.

2. Setting Customer as a Rewards Member

Open the *Cust* module, select the customer from the list at the top. A customer can be searched by using the bottom-left fields to type in relevant details. After locating the customer, check the 'Member' box in the center panel of customer details in the General tab as shown in the Figure 7. This applies any default rewards settings to the customer. Note that if the customer is not checked to be a member he/she will not receive the rewards even if connected to a sale. This step is necessary for all new and existing customers who you wish to earn rewards. Click the Save button after completing any changes.

Figure 7

The screenshot shows the 'rpCust1.exe' application window. At the top, there is a table with columns: CustomerId, Company, FirstName, LastName, Address1, Address2, City, state, Zip. The first row contains: 1234567890, , Mary, Smith, 540 Hudson S..., HACKENSA..., NJ, 07601. Below the table is a menu bar with options: General, Search, History, Misc, Combine/Change ID, User Defined, Admin, Statement. The 'General' tab is active. The main area contains several sections: CustomerID (1234567890), Company (dropdown), First Name (Mary), Last Name (Smith), Phone (123-456-7890), Address1 (540 Hudson Street), Address2, Zip (07601), State (NJ), City (HACKENSACK), Country (USA), Email (smith@gmail.com). In the center, there are checkboxes for 'Member' (checked) and 'Rewards' (highlighted). Other fields include Balance (****), Credit Limit (****), Tax ID, Class, DOB (01/01/00), Discount (0), and Recorded First At Store (01). At the bottom left, there are search fields for First Name, Last Name, and Phone, with a 'Go Search' button. At the bottom right, there are icons for Adv Search, Forget Layout, Save Layout, Save, Add New, Connect, and Bye Bye.

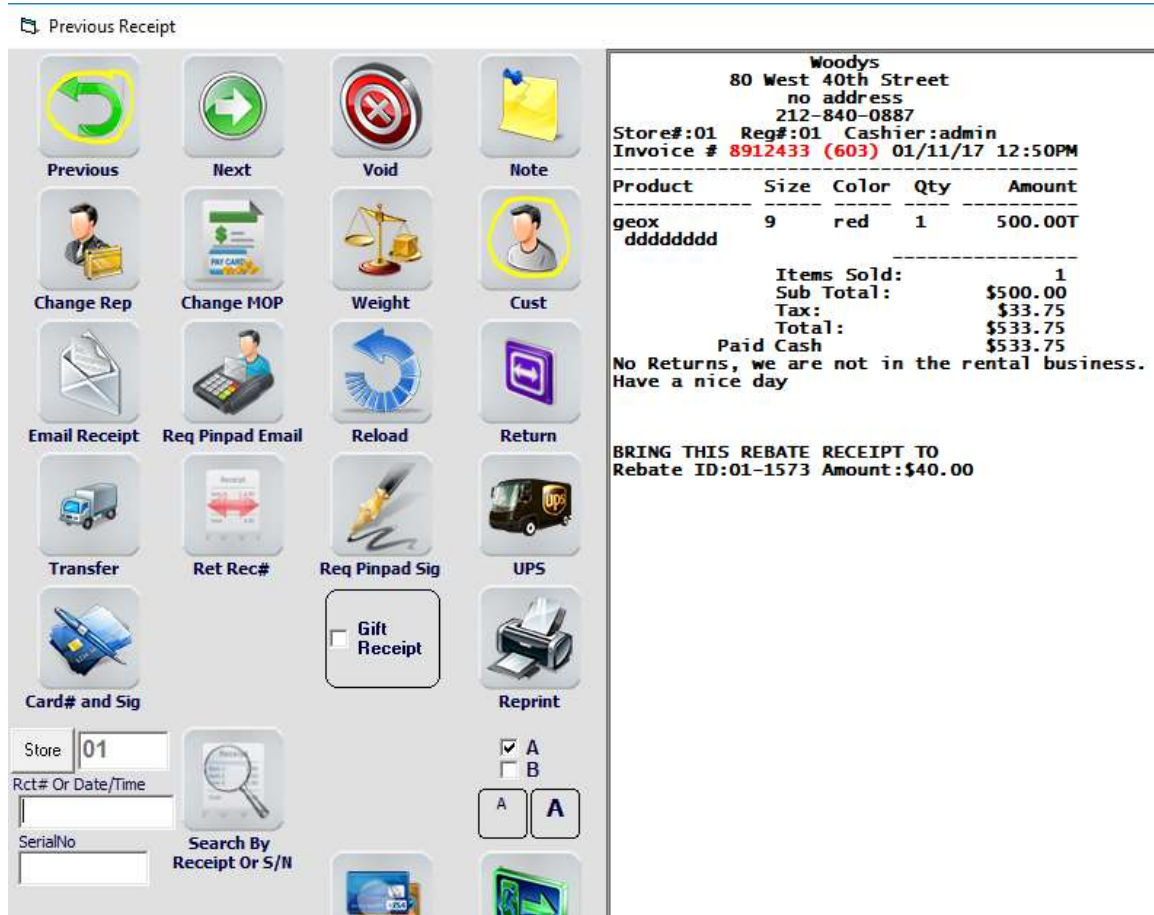
3. Earning Rewards

Once the previous steps are completed, the customers who were set as Members can start earning the rewards on every purchase they make. For this the cashier must select the customer from the *Cust* module located at the POS and click Connect button as displayed in Figure 7, to attach the desired customer to a sale.

Sales that do not have a customer attached will not provide rewards. If the cashier did not connect the customer during the sale, he/she can still attach a customer to the sale by opening *Previous*

module in the POS. Then cashier must find the correct receipt and click the Cust button as shown below in Figure 8. This will open a *Cust* module, that was previously described. There the cashier can select the desired customer and click Connect to attach him/her to the sale.

Figure 8



4. Checking Customer Rewards Balance

To view the current customer Rewards Balance open the *Cust* module from the POS, choose the customer you wish to check and click on the “Rewards” button located in the middle of the rpCust1 window that can be seen in Figure 7. A new window will open that displays a complete history of the customer's reward-earning purchases (see Figure 9). The 'Earned' amount reflects how much in rewards the customer has earned. 'Redeemed' shows the amount that has been used by the customer. The 'Balance' is the current amount of rewards. The cashier/manager can open any receipt from the list by double clicking on the receipt number.

Additionally, when the customer is connected to the sale, in the POS module, the cashier can

click on the Customer Info button (see Figure 10) that will display the customer information including his/her rewards balance.

Figure 9

Rewards History for Customer: 1234567890 Name: Mary Smith

Receipts with Earned Rewards								Receipts with Redeemed Rewards				
storeid	Date	Time	ReceiptNo	ReceiptTotal	Farned	Redeemed	Tax	Date	Storeid	Receiptno	Amount	Cashier
01	01/11/17	11:05 AM	8912420	225.00	11.25	11.25	15.19					
01	01/11/17	11:06 AM	8912421	152.00	7.60	7.60	10.26					
01	01/11/17	11:06 AM	8912422	-152.00	0.00	0.00	-10.26					
01	01/11/17	11:08 AM	8912424	800.00	40.00	0.00	54.00					
01	01/11/17	11:09 AM	8912426	119.00	5.95	0.00	8.03					
01	01/11/17	11:29 AM	8912428	119.00	5.95	0.00	8.03					
01	01/11/17	11:37 AM	8912429	225.00	11.25	0.00	15.19					
02	01/11/17	11:41 AM	8881138	29.00	2.90	0.00	0.00					

Earned: 84.90 Available To Redeem: 50.00 Balance: 66.05 Redeemed: 18.85 Spend To Next Level: 179.00 Receipt Total: 0.00

Buttons: A, A, Auto Size, Export, Email, Print, Adjust Rewards..., Bye Bye

Display Expired Rewards

5. Redeeming Rewards

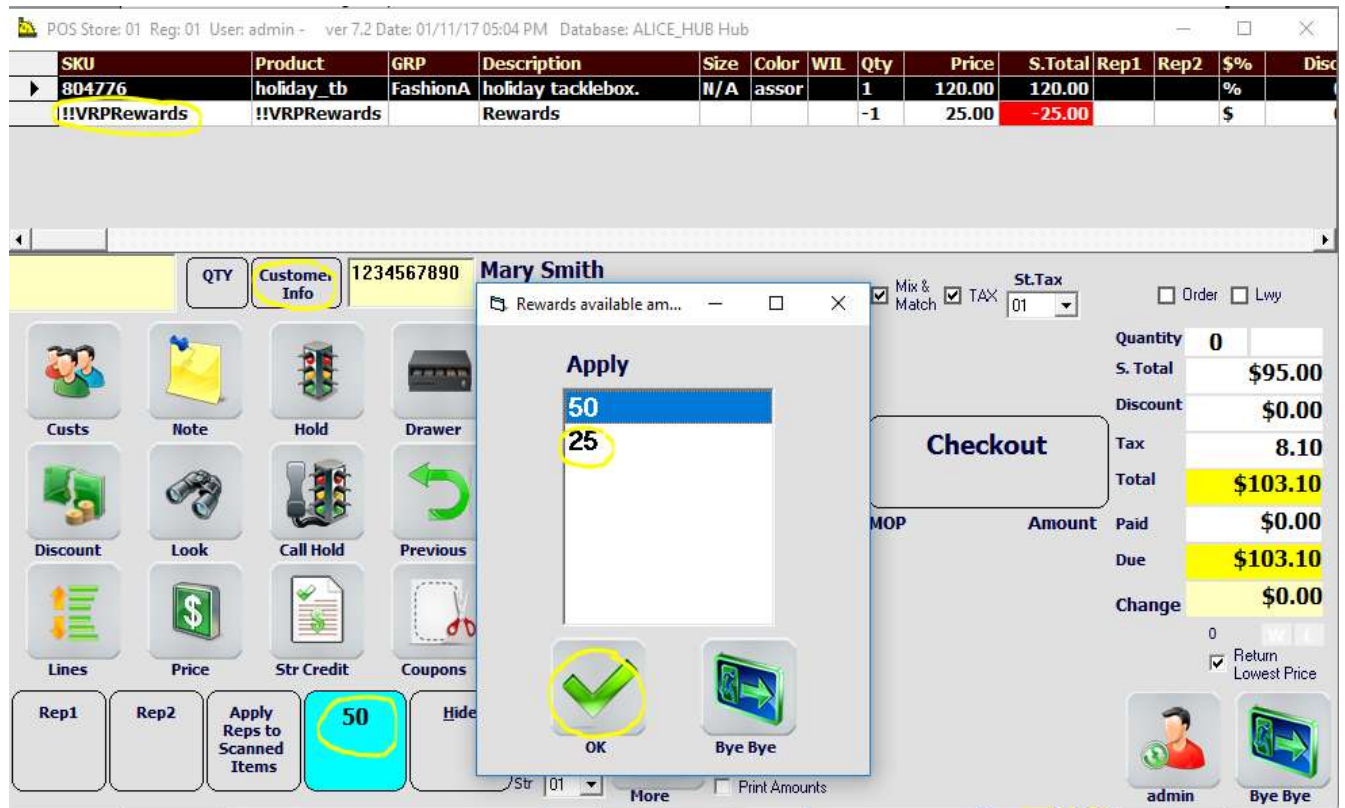
If the customer has rewards that are available for redemption, the “VIP” button in the POS window will display that amount when the customer is connected to a sale (see Figure 10). To redeem the customer rewards :

- connect the customer to the sale;
- scan the items the customer wants to purchase;
- click on the “VIP” button (It will be colored blue and will display the amount available for redemption);
- in the popup window select the amount the customer wishes to redeem then click OK;

A new line will be added to the list of the items in POS called “!!VRPRewards” that will indicate the amount being redeemed. The sale total will be reduced by that amount. For example, as can

be seen in the Figure 10 below, if the customer is buying a \$120 item and redeems \$25 towards the sale the total for the customer to pay is reduced to \$95.

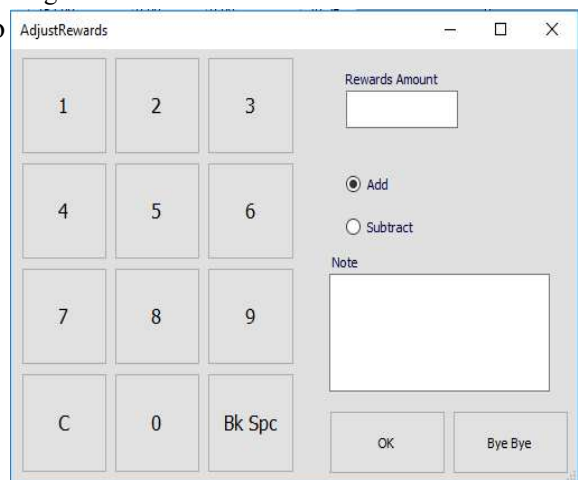
Figure 10



6. Manually Adjusting Rewards

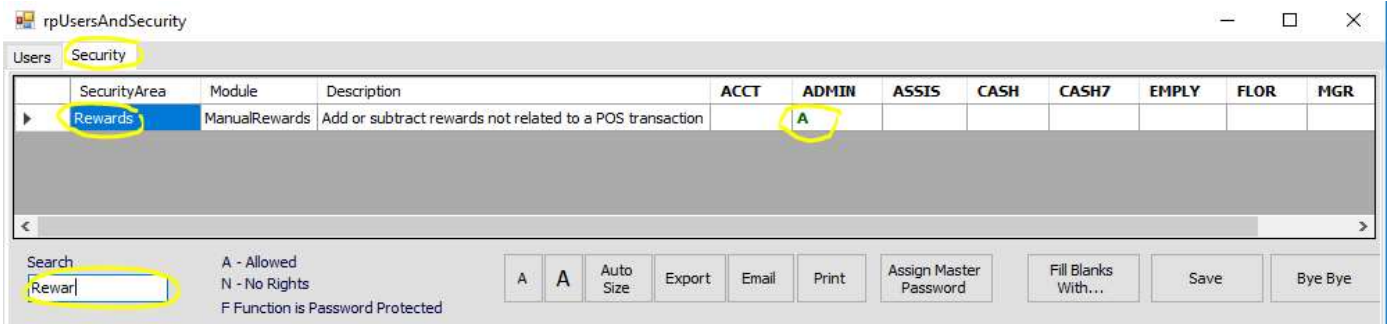
It is possible to manually add or subtract rewards to the customer account. To do this open customer rewards window such as in Figure 9 by finding a customer in the Cust module and clicking “Rewards” button in the middle. Then click the “Adjust Rewards” button as shown in Figure 9. The AdjustRewards pop-up will appear (see Figure 11). There check the Add or Subtract, enter the amount and click OK. The new line will be added to the customer Rewards history submitting the changes.

Figure 11



In VRP Security settings the administrator can select the users who will be allowed to do manual adjustment, as seen in Figure 12. This can be done by opening *Users* module in the Utilities, and then searching for Rewards in the Security tab.

Figure 12



7. Expiring Rewards

To set the expiration of rewards, go to *Setup* module, Global Setup tab and search for the RewardsExpirationMonths setting. Now set the SetupValue to the number of months that the customer rewards should be valid for (see Figure 13). Click “Save” to save changes. For example, if you want to give customers a year to use their rewards, then set the SetupValue to 12. In this case, the system will only count the customer rewards that were earned in the past 12 months and will not allow to redeem the rewards that were earned prior to that.

Figure 13

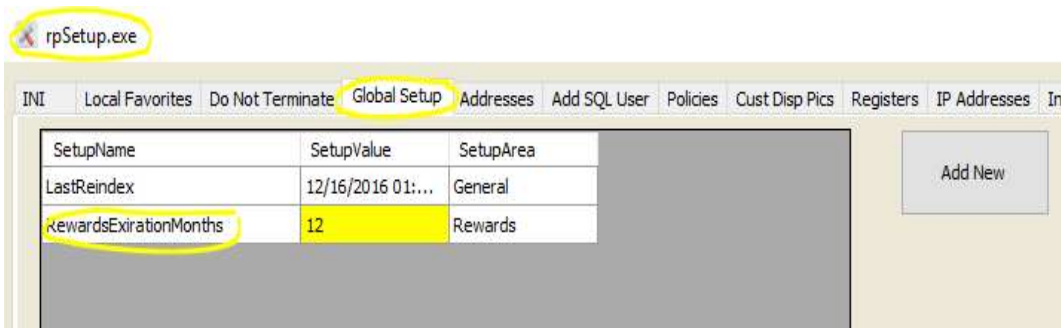


Figure 14 below shows the Rewards window for the customer with expired rewards. You can choose to display or to hide the expired rewards by checking the “Display Expired rewards” checkbox. The expired rewards records are displayed in the lighter color.

Figure 14

Rewards History for Customer: 5163710018 Name: Beth Herskowitz

Receipts with Earned Rewards								Receipts with Redeemed Rewards				
storeid	Date	Time	ReceiptNo	ReceiptTotal	Earned	Redeemed	Tax	Date	Storeid	Receiptno	Amount	Cashier
01	03/24/13	11:59 AM	280318	150.00	7.50	6.98	12.94					
01	05/08/13	04:28 PM	283102	195.00	9.75	0.00	16.82					
01	07/17/13	05:31 PM	288700	380.00	19.00	0.00	32.78					
01	12/02/13	11:49 AM	297438	0.00	2.00	0.00	0.00					
01	12/02/13	11:50 AM	297439	0.00	2.00	0.00	0.00					
01	12/02/13	11:50 AM	297440	0.00	2.00	0.00	0.00					
01	04/08/14	06:01 PM	303556	285.00	14.25	0.00	24.58					
01	04/03/16	02:36 PM	364884	295.00	14.75	0.00	25.44					
01	07/08/16	05:55 PM	390608	980.00	24.50	0.00	84.53					
01	07/10/16	12:50 PM	390653	105.00	2.63	0.00	9.06					
01	07/10/16	12:50 PM	390652	-105.00	0.00	0.00	-9.06					
01	07/10/16	12:52 PM	390654	-105.00	0.00	0.00	-9.06					
01	07/22/16	05:49 PM	392015	-625.00	0.00	0.00	-53.91					
01	07/22/16	05:56 PM	392016	595.00	14.88	0.00	51.32					

Earned Rewards applied to these receipts			
Cust	Store	Receipt	Amount

Earned	56.76	Available To Redeem	50.00	Balance	56.76	A	A	Auto Size	Export	Email	Print	Adjust Rewards...	Bye Bye
Redeemed	0.00	Spend To Next Level	729.60										
Receipt Total	1140.00												

Display Expired Rewards