



## Soft Intelligence, Inc.

Overview for Rewards Plus V4  
Revised 07/21/2016

Rewards Plus (R+) is a customer loyalty program that rewards customers with a reward after the purchase of "X" items within "Y" months. Customers must purchase like items, all from the same brand/size. Customers may have multiple loyalty programs going at the same time. The number of months allowed to purchase the required amount can be set for each R+ Program.

R+ Customer History tables are populated and maintained automatically whenever a customer purchases a qualified product. New purchases add to bag count. Purchases older than "Y" months will drop off the eligible list. Once a customer reaches the required number of bags, those sales are locked until redeemed. The default walk in customer for the store will automatically be excluded.

When the Cashier enters the number of a participating customer, an Auto-Note appears to inform the cashier if the customer is eligible for any rewards and the status of programs they are members. The Auto-Notes are also maintained by the R+ program.

Customer participation and updated totals are printed at the bottom of the receipt each time that customer purchases, regardless of purchase being in one of the programs.

Single button redemption. No hoops to jump through, simply select the item and click a button.

If a customer redeems a reward, it resets the counts to zero. Along with the normal receipt, a Vendor Redemption Form also prints for submission to the vendor for reimbursement. The Redemption form includes all of the qualified sales information to verify the validity of the redemption. A laser printer is required for this feature.

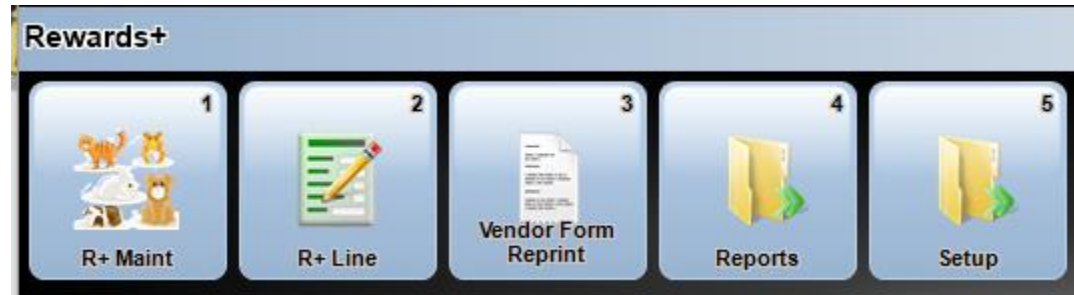
### **NEW Features:**

- Items are now classified as Qualified when the required quantity is purchased. Qualified items do not expire.
- Rewards Plus tables for Brand, Size, Goal, R+ Term, and Programs
- New Reports for tracking Rewards+ programs and redemptions.
- Error checking to prohibit invalid redemptions.
- Offline Tickets are populated into the Rewards Plus tables prior to posting.
- Ability to exclude specific customers from Rewards Plus.

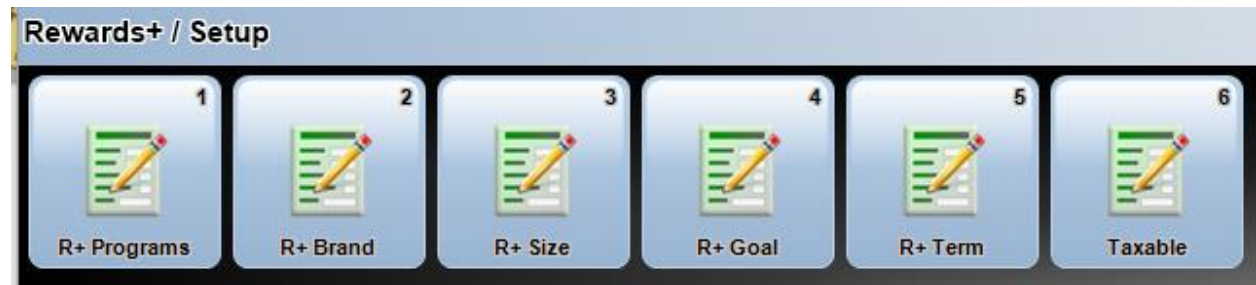


## Setup Rewards+ Programs:

Your main CP menu has a Rewards+ button for Rewards Plus.



## Setup:



## Taxable:

Are you required to charge state sales tax even on the rewards?

Yes or no.

If yes, simply select the correct store and check the box if required to charge Sales Tax.

The default is NO.

Taxes are charged based on Price 1 of the item being redeemed.

Please note that this a "Per Store" setting. Store 1 can charge Sales tax on a redemption while Store 2 doesn't charge the tax.

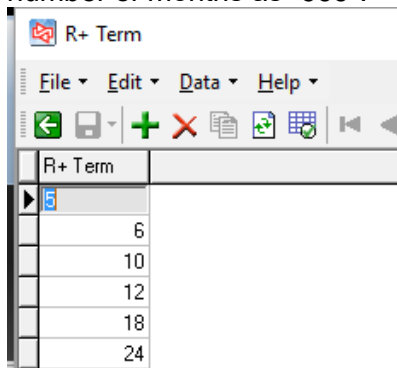
Tax Redemptions?

Store EAST



### R+ Term:

Here we enter the choices for the number of months your customers have to purchase the required amount to qualify for a reward. While there is no “unlimited” feature, you can enter the number of months as “999”.

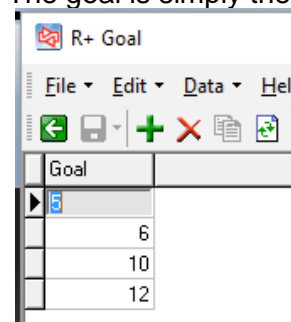


The screenshot shows the 'R+ Term' software window. It has a menu bar with 'File', 'Edit', 'Data', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is a table with one column labeled 'R+ Term'. The table contains the following rows:

R+ Term
6
10
12
18
24

### R+ Goal:

The goal is simply the number of items that need to be purchased to qualify for a reward.

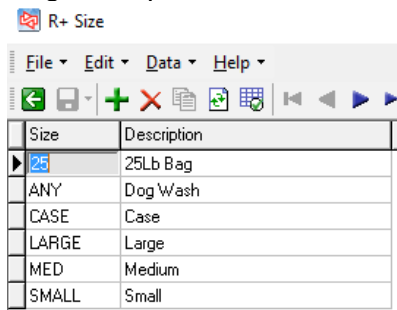


The screenshot shows the 'R+ Goal' software window. It has a menu bar with 'File', 'Edit', 'Data', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is a table with one column labeled 'Goal'. The table contains the following rows:

Goal
6
10
12

### R+ Size:

What size? Large, Medium, Small, 25lb bag? You can setup cases of canned food and exclude single can purchases.

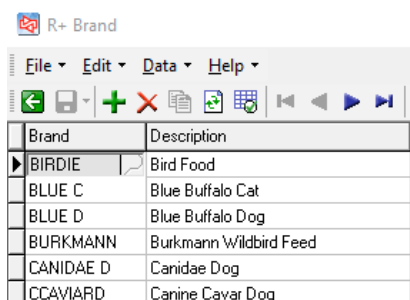


The screenshot shows the 'R+ Size' software window. It has a menu bar with 'File', 'Edit', 'Data', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is a table with two columns: 'Size' and 'Description'. The table contains the following rows:

Size	Description
25	25Lb Bag
ANY	Dog Wash
CASE	Case
LARGE	Large
MED	Medium
SMALL	Small

### R+ Brand:

The brand name of the item.



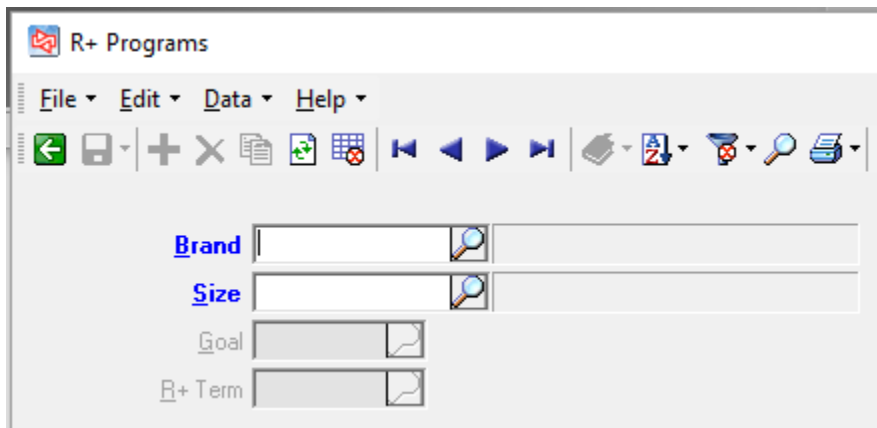
The screenshot shows the 'R+ Brand' software window. It has a menu bar with 'File', 'Edit', 'Data', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is a table with two columns: 'Brand' and 'Description'. The table contains the following rows:

Brand	Description
BIRDIE	Bird Food
BLUE C	Blue Buffalo Cat
BLUE D	Blue Buffalo Dog
BURKMANN	Burkman Wildbird Feed
CANIDAE D	Canidae Dog
CCAVIARD	Canine Cavar Dog



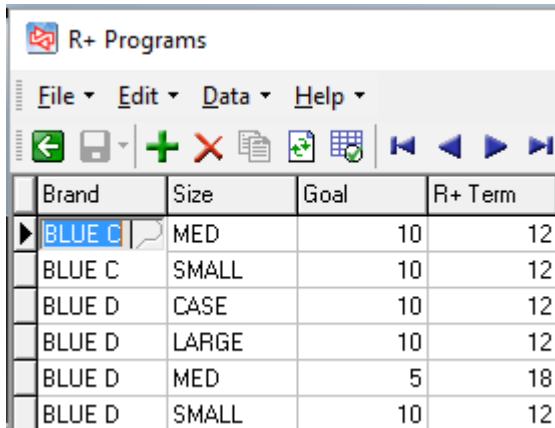
## R+ Programs:

This is where we combine the BRAND, SIZE, GOAL, and R+ TERM.



The screenshot shows the 'R+ Programs' application window. It has a menu bar with 'File', 'Edit', 'Data', and 'Help'. Below the menu is a toolbar with various icons for navigation and editing. The main area contains four input fields: 'Brand', 'Size', 'Goal', and 'R+ Term'. Each field has a small magnifying glass icon to its right, indicating a search or lookup function.

Each program is based on the BRAND and SIZE and will have a GOAL and R+ TERM. Please note that a single vendor can have different GOALS and R+TERMS.



The screenshot shows the 'R+ Programs' application window with a data table. The table has four columns: 'Brand', 'Size', 'Goal', and 'R+ Term'. The first row is highlighted in blue and contains the values 'BLUE C', 'MED', '10', and '12'. The other rows contain the following values:

Brand	Size	Goal	R+ Term
BLUE C	MED	10	12
BLUE C	SMALL	10	12
BLUE D	CASE	10	12
BLUE D	LARGE	10	12
BLUE D	MED	5	18
BLUE D	SMALL	10	12

You can change the GOAL and R+ TERM for a program but not the BRAND or SIZE. If you change the R+ TERM, it is "going forward". Rewards+ does not go back and change Expired to Eligible or Qualified to Eligible.

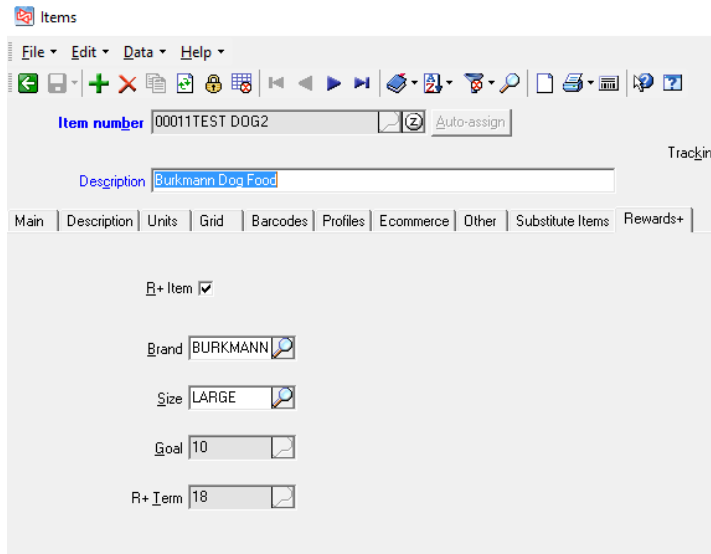
Changing the goal will not affect items already set as Qualified. If you reduce the GOAL (say from 10 to 5) all currently Eligible items will then be marked as Qualified. All qualified items are used on a redemption. Please see the Excess Report below.

If you change either the GOAL or R+ TERM, Rewards+ will change the related fields in the Item Table and the Rewards+ Maintenance Tables



## Setup Items for Rewards+:

In Counterpoint, we set each item as being a R+ Item, and which Program it belongs using the Rewards+ tab on the Items Screen. This must be done for each eligible item.



Items

File Edit Data Help

Item number 00011TEST DOG2 Auto-assign

Description Burkmann Dog Food

Main Description Units Grid Barcodes Profiles Ecommerce Other Substitute Items Rewards+


R+ Item

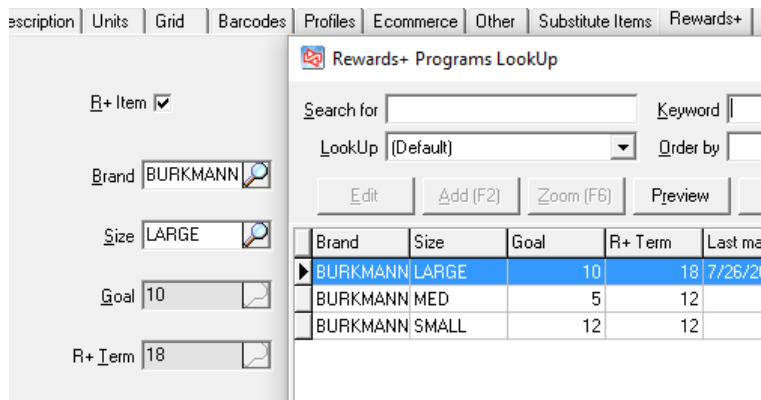
Brand BURKMANN

Size LARGE

Goal 10

R+ Term 18

Your LOOKUPS  will show you the selections for that field. Once you select your BRAND, the SIZE lookup will only offer sizes available for that BRAND in the R+ Programs table. The GOAL and R+ TERM will automatically populate when you save the item.



escription Units Grid Barcodes Profiles Ecommerce Other Substitute Items Rewards+

Rewards+ Programs LookUp

Search for Keyword

LookUp (Default) Order by

Edit Add (F2) Zoom (F6) Preview

Brand	Size	Goal	R+ Term	Last mai
BURKMANN LARGE		10	18	7/26/20
BURKMANN MED		5	12	
BURKMANN SMALL		12	12	

Note that you do have an option for R+ Item – checked or unchecked. Check this box to make the item eligible for R+. You may uncheck the box later, this will let you ‘deactivate’ an item without losing the program information.



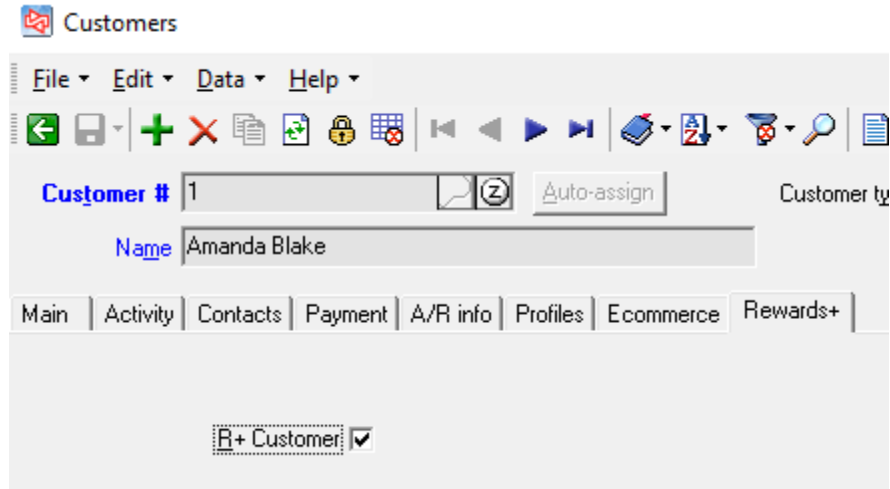
## Setup Customers in Rewards+:

All customers are automatically included in R+ although you may have reasons to exclude specific customers.

MAIN MENU – CUSTOMERS – CUSTOMERS - Click the Rewards+ tab.

If R+ Customer is checked, they are included. Remove the check to exclude the customer from R+.

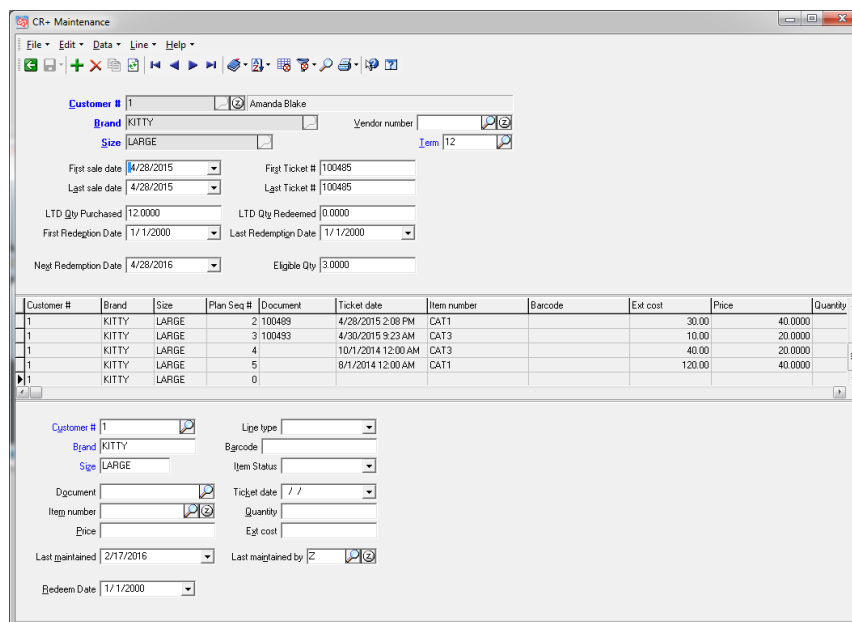
The default is checked so all new customers are included.



The screenshot shows the 'Customers' application window. At the top, there is a menu bar with 'File', 'Edit', 'Data', and 'Help'. Below the menu bar is a toolbar with various icons. The main area contains a form with the following fields: 'Customer #' with the value '1', 'Name' with the value 'Amanda Blake', and a checked checkbox labeled 'R+ Customer'. Below the form is a tabbed interface with tabs for 'Main', 'Activity', 'Contacts', 'Payment', 'A/R info', 'Profiles', 'Ecommerce', and 'Rewards+'. The 'Rewards+' tab is currently selected.

You do not have to enter new customers into programs. Customers will automatically be entered when they purchase a qualified item. Your default “walk-in” customer is excluded.

Maintenance tables are provided to fix entries and to manually add purchases from a previous tracking program.



The screenshot shows the 'CR+ Maintenance' application window. The main area contains a form with the following fields: 'Customer #' with the value '1', 'Brand' with the value 'KITTY', 'Size' with the value 'LARGE', 'First sale date' with the value '4/28/2015', 'Last sale date' with the value '4/28/2015', 'LTD Qty Purchased' with the value '12.0000', 'LTD Qty Redeemed' with the value '0.0000', 'First Redemption Date' with the value '1/1/2000', 'Last Redemption Date' with the value '1/1/2000', 'Next Redemption Date' with the value '4/28/2016', and 'Eligible Qty' with the value '3.0000'. Below the form is a table with the following columns: 'Customer #', 'Brand', 'Size', 'Plan Seq #', 'Document', 'Ticket date', 'Item number', 'Barcode', 'Ext cost', 'Price', and 'Quantity'. The table contains five rows of data. Below the table is another form with the following fields: 'Customer #' with the value '1', 'Brand' with the value 'KITTY', 'Size' with the value 'LARGE', 'Document' with the value '1', 'Item number' with the value '1', 'Price' with the value '30.00', 'Last maintained' with the value '2/17/2016', and 'Redeem Date' with the value '1/1/2000'.

Customer #	Brand	Size	Plan Seq #	Document	Ticket date	Item number	Barcode	Ext cost	Price	Quantity
1	KITTY	LARGE	2	100489	4/28/2015 2:08 PM	CAT1		30.00		40.0000
1	KITTY	LARGE	3	100493	4/28/2015 9:23 AM	CAT3		10.00		20.0000
1	KITTY	LARGE	4		10/1/2014 12:00 AM	CAT3		40.00		20.0000
1	KITTY	LARGE	5		8/1/2014 12:00 AM	CAT1		120.00		40.0000
1	KITTY	LARGE	0							



Program is updated after each sale for that customer and automated routines run nightly and update all participating customers regardless of purchases made.




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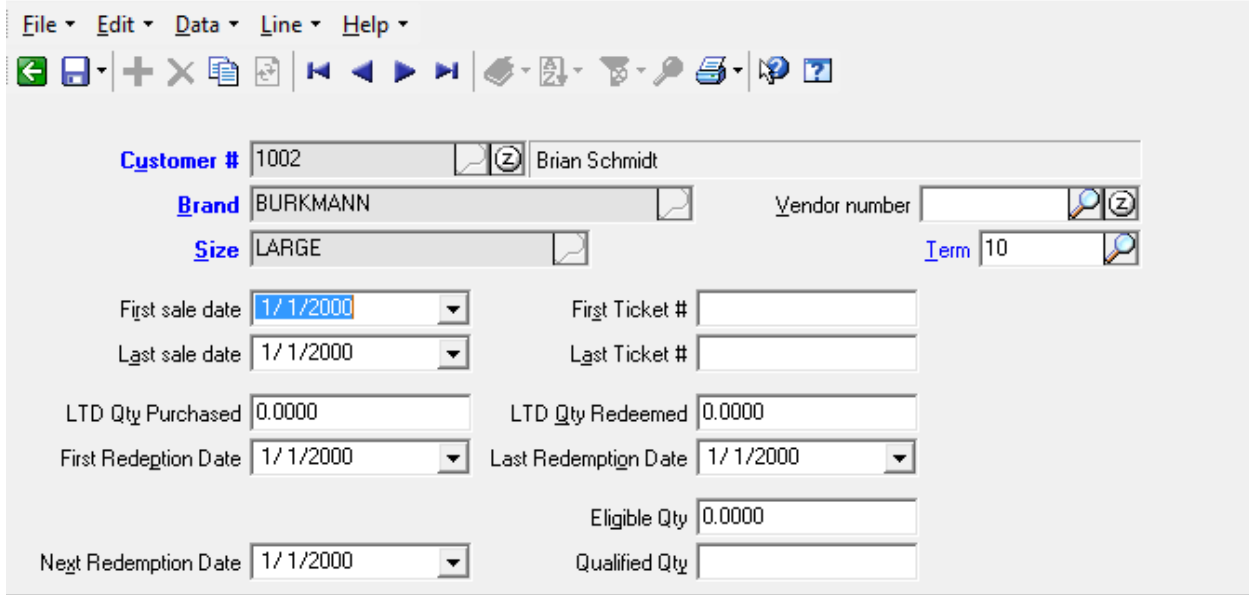
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## Manually entering data from previous programs:

You can manually enter data from previous rewards programs. How much data you enter will be dependent on your vendors and what they require to reimburse you for any redemptions.

First, enter the Customer, Brand, Size and Term in the Header. **Save.**

 Rewards+ Maintenance



<b>Customer #</b>	1002			Brian Schmidt			
<b>Brand</b>	BURKMANN			<b>Vendor number</b>	<input type="text"/>		
<b>Size</b>	LARGE			<b>Term</b>	10		
<b>First sale date</b>	1/ 1/2000			<b>First Ticket #</b>	<input type="text"/>		
<b>Last sale date</b>	1/ 1/2000			<b>Last Ticket #</b>	<input type="text"/>		
<b>LTD Qty Purchased</b>	0.0000			<b>LTD Qty Redeemed</b>	0.0000		
<b>First Redemption Date</b>	1/ 1/2000			<b>Last Redemption Date</b>	1/ 1/2000		
<b>Next Redemption Date</b>	1/ 1/2000			<b>Eligible Qty</b>	0.0000		
				<b>Qualified Qty</b>	<input type="text"/>		





Now start entering the previous sales. If your vendors will permit, you can simply enter a single line with the previous quantity sold.

Customer #	Brand	Size	Plan Seq #	Document	Ticket date
▶ 1002	BURKMANN	LARGE	0		

<p><u>C</u>ustomer # <input type="text" value="1002"/> </p> <p><u>B</u>rand <input type="text" value="BURKMANN"/> </p> <p><u>S</u>ize <input type="text" value="LARGE"/> </p> <p><u>D</u>ocument <input type="text" value="TICKET #"/> </p> <p><u>I</u>tem number <input type="text" value="00011TEST DOG2"/> </p> <p><u>P</u>rice <input type="text" value="0.0000"/></p> <p><u>L</u>ast <u>m</u>aintained <input type="text" value="7/ 5/2016"/> </p> <p><u>R</u>edeem Date <input type="text" value="1/ 1/2000"/> </p>	<p><u>L</u>ine type <input type="text" value="Sale"/> </p> <p><u>B</u>arcode <input type="text"/></p> <p><u>I</u>tem Status <input type="text" value="Eligible"/> </p> <p><u>T</u>icket date <input type="text" value="/ /"/> </p> <p><u>Q</u>uantity <input type="text" value="8.0000"/></p> <p><u>E</u>xt cost <input type="text"/></p> <p><u>L</u>ast maintained by <input type="text" value="Z"/> </p>
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## Rewards+ Reports:




### Redemption Tracking:

Provides a breakdown of Redeemed Items

You can group the report by Customer, Vendor, Program, or Item.

#### Redemption Tracking

Parameters | Ticket History Line

Group By:  

- Customer
- Vendor
- Program
- Item

The report will show all tickets with a Rewards+ Redemption and totals for each group.

Date 7/21/2016 Time 11:00:05AM

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Pet Rewards V4  
Rewards+ Redemption Tracking Report by Program

**BLUE D / MED**

Ticket#	Cust#	Item#	Brand/Size	Vend#	Ticket Date
100531	1	0001TEST DOG FOOD	BLUE D / MED	1004	04/07/2016
Ticket Count: 1		Customer Count: 1		Qty Redeemed: 1	

**DOGGY / LARGE**

Ticket#	Cust#	Item#	Brand/Size	Vend#	Ticket Date
100556	1	DOG1	DOGGY / LARGE		05/19/2016
Ticket Count: 1		Customer Count: 1		Qty Redeemed: 1	



Pet Rewards V4  
Rewards+ Redemption Tracking Report by Customer

**1** **AMANDA BLAKE**

<u>Ticket#</u>	<u>Cust#</u>	<u>Item#</u>	<u>Brand/Size</u>	<u>Vend#</u>	<u>Ticket Date</u>
100531	1	0001TEST DOG FOOD	BLUE D / MED	1004	04/07/2016
100556	1	DOG1	DOGGY / LARGE		05/19/2016
100543	1	CAT2	KITTY / MED		04/08/2016
<b>Ticket Count: 3</b>	<b>Customer Count: 1</b>			<b>Qty Redeemed: 3</b>	

**100005** **J. LOMBARDI**

<u>Ticket#</u>	<u>Cust#</u>	<u>Item#</u>	<u>Brand/Size</u>	<u>Vend#</u>	<u>Ticket Date</u>
100564	100005	PUPPY3	PUPPY / SMALL	1234	06/28/2016
<b>Ticket Count: 1</b>	<b>Customer Count: 1</b>			<b>Qty Redeemed: 1</b>	
<b>Ticket Count: 4</b>	<b>Customer Count: 2</b>			<b>Qty Redeemed: 4</b>	



## Excess Report:

Example: Your customer currently has 9 items eligible and they need one more to qualify for a reward. Their next purchase is 2 items. Rewards+ will now show 11 items as qualified. If they then collected their reward, all 11 items would be used for the redemption.

If you choose, you can run the Excess Report which will give you a list of the customers which have an excess of qualified items and you may manually edit the customer's items to change one back to Eligible.

## Qualified Report:

A simple list of all customers that have qualified for a reward.

## Rewards+ Stats:

By Rewards+ Program, the number of customers who are in each program, how many items are Eligible, the number of customers that are currently qualified for a reward, LTD Expired, and LTD Redeemed.

7/21/2016

Page 1 of 1

### Rewards+ Stats by Brand/Size

	# of Customers	Current# Eligible	# Qualified	LTD Expired	LTD Redeemed
BLUE C/SMALL	1	2	0	0	0
BLUE D/MED	1	3	0	0	1
DOGGY/LARGE	3	1	0	1	12
DOGGY/SMALL	2	2	0	1	0
DOGWASH/ANY	1	0	0	0	0
KITTY/LARGE	1	1	0	11	0
KITTY/MED	1	0	0	12	1
PUPPY/LARGE	2	0	0	2	0
PUPPY/MED	2	4	0	1	0
PUPPY/SMALL	3	10	0	0	9

## Program List:

A list of all programs showing Brand, Size, Goal, and R+ Term.



Pet Rewards V4  
Rewards+ Program List

Order by:

Brand	Size	Goal	RP Term
BLUE C	CASE	10	12
BLUE C	MED	10	12
BLUE C	SMALL	10	12
BLUE D	CASE	10	12
BLUE D	LARGE	10	12
BLUE D	MED	5	18
BLUE D	SMALL	10	12
BURKMANN	LARGE	12	12
BURKMANN	MED	5	12
BURKMANN	SMALL	12	12
CANIDAE D	SMALL	12	12
CCAVIARD	LARGE	12	12
CHAMPION C	MED	12	12

**VendForm from Hist:**

If your vendor needs another copy of the Vendor Redemption Form, you can reprint the form from Ticket History.

You will need to know the Customer#, Brand, Size, and Redemption Date.

VendForm from Hist

Customer # 100005

Brand PUPPY

Size SMALL

Rdm Date 6/28/2016

E-mail Preview Print Options >> Close Help



# Puppy Food

**Retailer:** Store Name  
Add1  
Add2  
Add3  
City, State ZIP  
Phone

**Invoice No:** 100564  
**Invoice Date:** 6/28/2016

**Vendor:** PET FOOD SUPPLIER  
1234 Plano Rd  
Plano, TX 75023

**Customer:** J. LOMBARDI  
**# 100005**  
.  
jlobardi555@gmail.com

**Received By:** \_\_\_\_\_

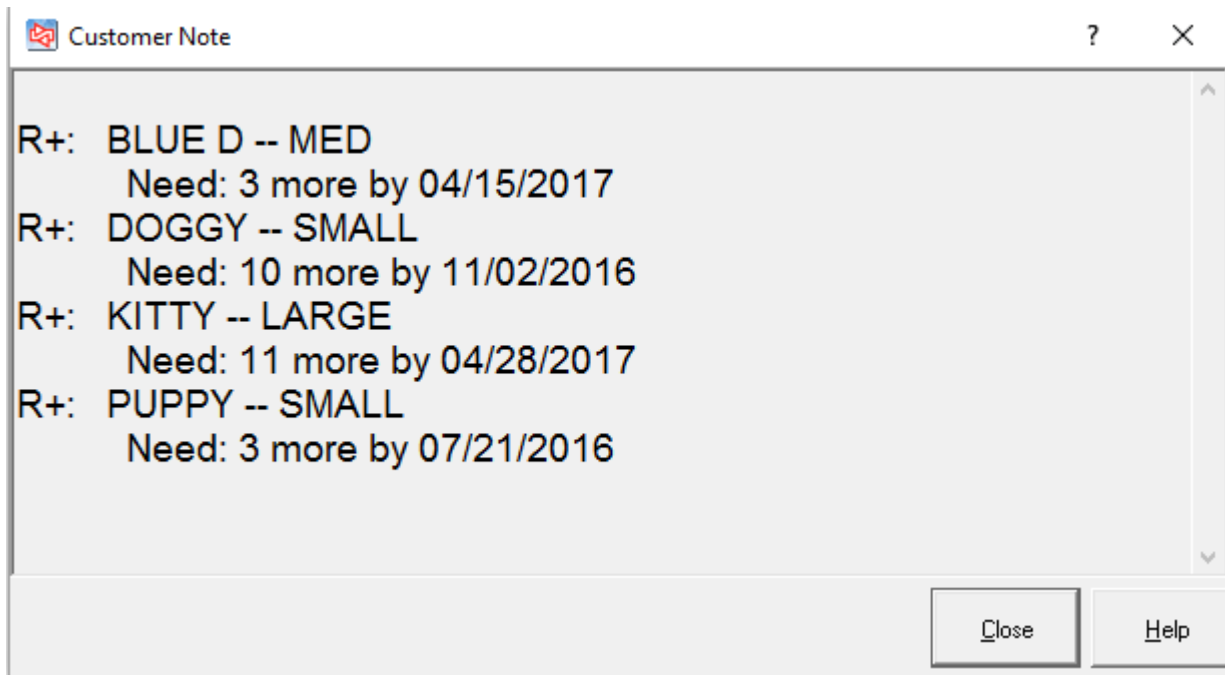
<u>Brand/Size</u>	<u>Item#</u>	<u>Description</u>	<u>SKU</u>	<u>Qty Sold</u>	<u>Price</u>	<u>Tkt#</u>	<u>Date Sold</u>
PUPPY/SMALL	PUPPY3	SMALL BAG OF PUPPY FOOD	800008	1	\$20.00	100532	04/07/2016
PUPPY/SMALL	PUPPY3	SMALL BAG OF PUPPY FOOD	800008	1	\$15.00	100550	01/19/2016
PUPPY/SMALL	PUPPY3	SMALL BAG OF PUPPY FOOD	800008	1	\$15.00	100549	02/19/2016
PUPPY/SMALL	PUPPY3	SMALL BAG OF PUPPY FOOD	800008	1	\$15.00	100551	03/19/2016
PUPPY/SMALL	PUPPY3	SMALL BAG OF PUPPY FOOD	800008	1	\$15.00	100552	05/19/2016
PUPPY/SMALL	PUPPY3	SMALL BAG OF PUPPY FOOD	800008	1	\$15.00	100553	05/19/2016
PUPPY/SMALL	PUPPY3	SMALL BAG OF PUPPY FOOD	800008	1	\$20.00	100557	06/02/2016
PUPPY/SMALL	PUPPY3	SMALL BAG OF PUPPY FOOD	800008	1	\$20.00	100563	06/28/2016
PUPPY/SMALL	PUPPY3	SMALL BAG OF PUPPY FOOD	800008	1	\$0.00	100564	06/28/2016

LOYALTY



**Screen Shots:**

AutoNotes:



## Redemption Errors

