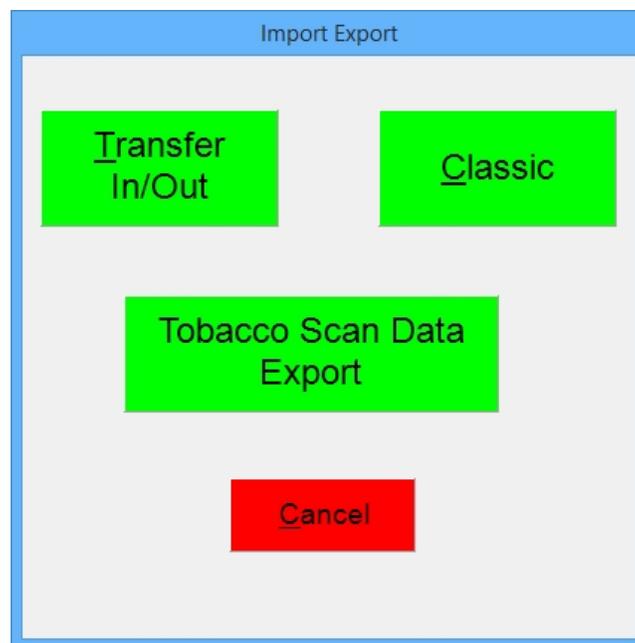


Tobacco Scan Data Export Tool – Phillip Morris



Cash Register Express now supports the ability to export invoice data relating to a specified department in a file that can be given to companies that collect this data. This export can be used by brands that issue manufacturer coupons. This will make it easier for these manufacturers to calculate the total amount to refund to the store for coupons that were used to apply discounts to the tobacco products.

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Important Notes:

- CRE Version **12.80271** or newer **must be installed** in order to use this feature.
- **Before using this feature**, a retailer must contact an Altria Group Distribution Company representative to **register** their business to participate in the PM USA Scan Data Program. The retailer will then work with a Scan Data Help Desk representative to assist with the setup, data collection and transmission processes to certify their scan data exports before they begin to receive refunds for the manufacturer promotions. **Contact** the Scan Data Help Desk @ 1-844-230-3454 to **learn how to register**.
- After the scan data has been exported into the .txt file from CRE. **It must be submitted** via the method specified by the representative from the Scan Data Help Desk.
- If you are exporting sales data for **Philip Morris** products, you must have your **Management Account Number** or **Retail Control Number** available prior to configuring CRE to perform the exports. Without this account number, your exported data may be rejected.
- CRE Version **12.9019** or newer you have the ability to use **Phillip Morris Loyalty Plans** with customers.

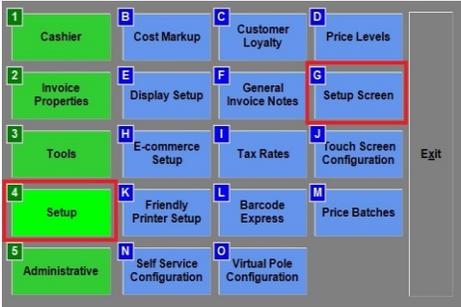
Revision History

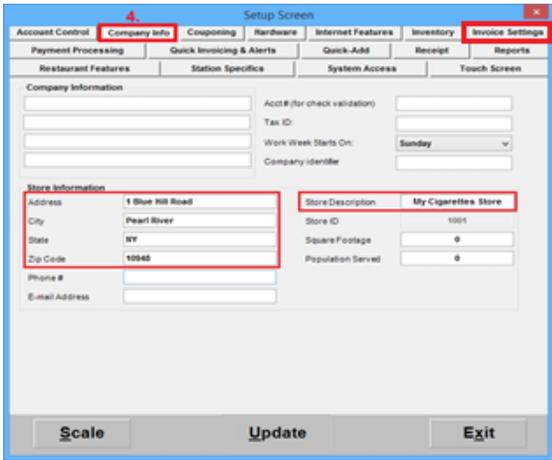
| Document Version | Date | Author | Description of Changes |
|-------------------------|----------------|---------------|---|
| 1.0 | March 8, 2018 | MP | 1st Release |
| 1.1 | April 23, 2019 | JC | Adding Multi-pack and loyalty Configurations. |

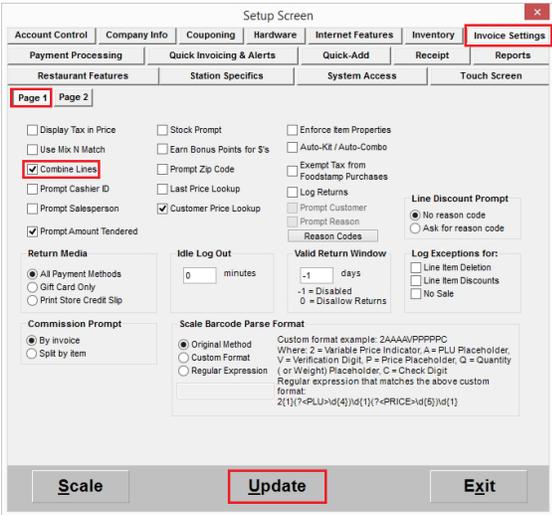
Setting Up your Store Information

Your store information must be configured in the **Company Information** tab of the **Setup Screen** prior to performing an export. If this information is not included in the export the sales data may be rejected.

| | |
|--|---|
|   | <ol style="list-style-type: none"> 1. Select Manager or Options and enter the administrative credentials |
|--|---|

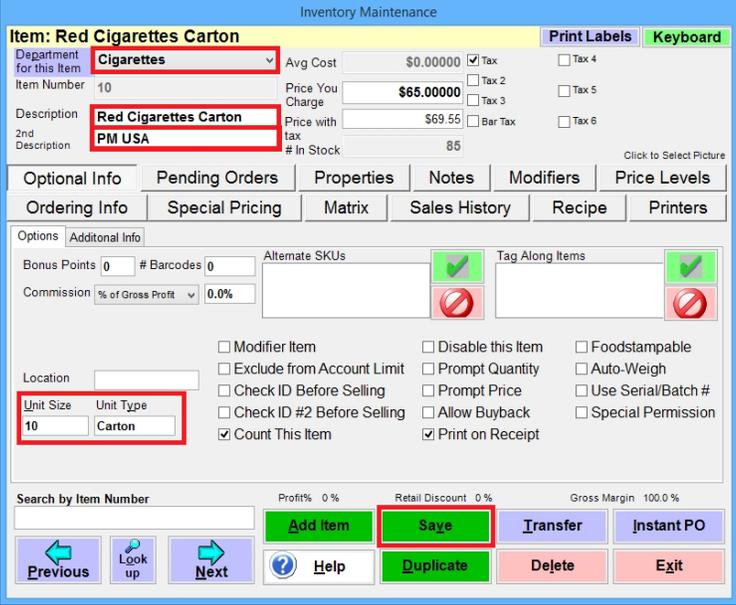
| | |
|---|---|
|  | <ol style="list-style-type: none"> 2. Select Setup 3. Select Setup Screen |
|---|---|

| | |
|--|--|
|  | <ol style="list-style-type: none"> 4. Select the Company Info tab 5. Under the Store Information section enter your store's information in the following fields: <ul style="list-style-type: none"> ● Store Description (your store's name) ● Address ● City ● State (CAPITAL LETTERS ONLY) ● Zip Code |
|--|--|

| | |
|---|--|
|  | <ol style="list-style-type: none"> 6. Select Invoice Settings 7. Enable Combine Lines 8. Select Update |
|---|--|

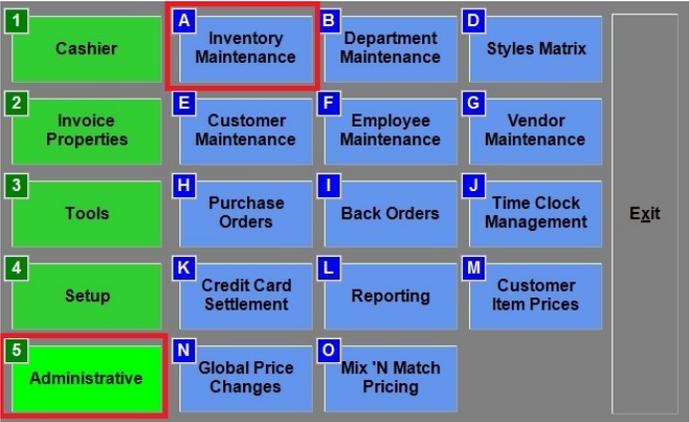
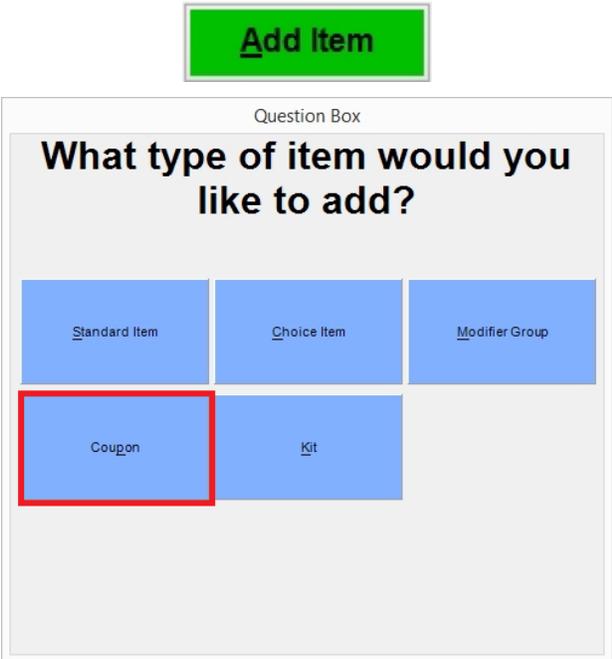
Phillip Morris - Configuring Consumer Units

In order for the exported data to provide the right information, your items in the inventory maintenance must be configured with the correct unit type and unit measurement information. Depending on the item's manufacturer, different unit sizes must be configured. As an example, **Philip Morris requires** both the **quantity** and the **consumer units** of certain products in their export. As an example, if you sell a carton of cigarettes, the quantity of 1 carton as well as the consumer units of 10 packs must be included in the exported data. The same must be done for chewing tobacco, and other products.

| | |
|---|---|
|  | <ol style="list-style-type: none"> 1. Select Manager or Options and enter the administrative credentials |
|  | <ol style="list-style-type: none"> 2. Select Administrative 3. Select Inventory Maintenance. |
|  | <ol style="list-style-type: none"> 4. Navigate to the Philip Morris item that needs to be configured. 5. For Department for this item select a department. This department must match the selected department during the export to include the item. 6. In the Unit Size specify the number of packs within the carton. 7. In the Unit Type specify the container of the item. Example (Carton, Roll, Pack, etc.) 8. For Second Description Enter (PM USA or Philip Morris) to indicate the manufacturer of the item. 9. Select Save |

Adding a Manufacturer Coupon to CRE

In order for the export tool to recognize the difference between a coupon offered by the store and the manufacturer, specific parameters must be configured when making the coupon.

| | |
|---|---|
|  | <ol style="list-style-type: none">1. Select Manager or Options and enter the administrative credentials |
|  | <ol style="list-style-type: none">2. Select Administrative3. Select Inventory Maintenance. |
|  | <ol style="list-style-type: none">4. Select Add Item when the inventory maintenance screen appears5. Select Coupon when prompted |

Inventory Maintenance

Enter information for the item and touch 'Save' [Print Labels](#) [Keyboard](#)

Department for this Item: **NONE** Flat Amount Percent Tax Tax 4

Item Number: **123456789** Discount Amount: **(\$1.00)** Tax 2 Tax 5

Description: **1\$ off 1 Pack** Tax 3 Tax 6

2nd Description: **PM** Click to Select Picture

Days Valid: Does this coupon expire? Expiration Date:

Valid Days and Times

| | |
|-----------|-------------------|
| Sunday | 12:00 AM-11:59 PM |
| Monday | 12:00 AM-11:59 PM |
| Tuesday | 12:00 AM-11:59 PM |
| Wednesday | 12:00 AM-11:59 PM |
| Thursday | 12:00 AM-11:59 PM |
| Friday | 12:00 AM-11:59 PM |
| Saturday | 12:00 AM-11:59 PM |

[Add Time](#)
[Delete Time](#)

Search by Item Number: Profit% 0% Retail Discount 0% Gross Margin 0%

[Save](#) [Save](#) [Transfer](#) [Instant PO](#)

[Previous](#) [Look up](#) [Next](#) [Help](#) [Duplicate](#) [Delete](#) [Cancel](#)

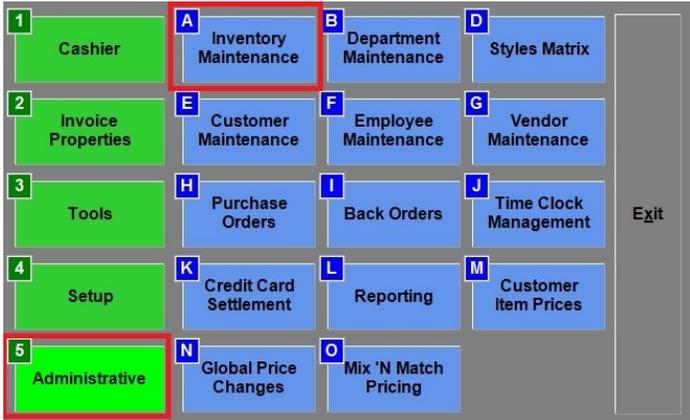
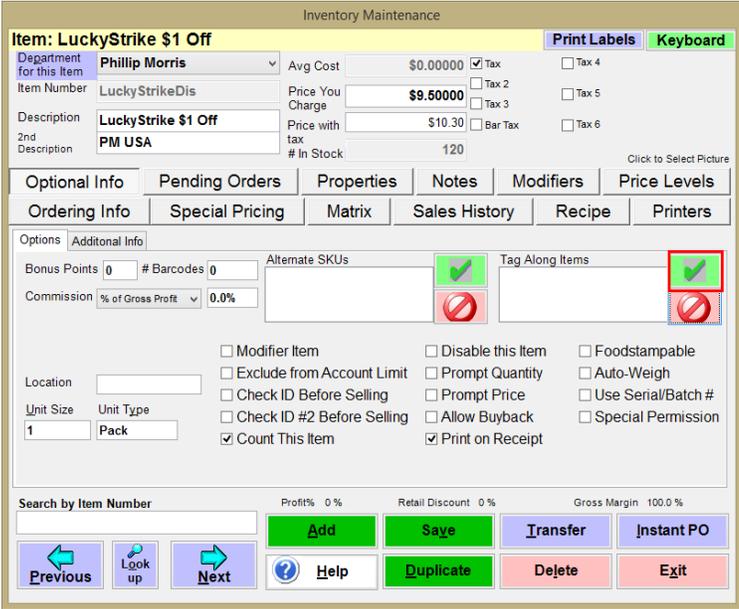
7. Configure the Coupon item with the following settings:

- For the **Department for this Item** select a department that is **NOT THE SAME** as your tobacco items.
- For the **Item Number**: scan the barcode on the manufacturer coupon.
- For the **Description** enter the type of discount that will be applied to the item (**Example: \$1 off 1 pack**) this description is what will appear on the invoice screen for the cashier to know what discount is being applied.
- For the **2nd Description** enter the manufacturer/brand of the item/coupon. This should be provided by the manufacturer company that is running the promotional coupons. This is used in the export to determine which promotion is being applied to each item. **This is required in order to receive the manufacturer refund for the coupon.**
- **Discount Type**; Either **Flat** or **Percent**
- For the **Discount Amount** enter the discount that will be applied to the item when the coupon is added to the invoice.

8. Configure the rest of the coupon settings such as restrictions and expiration. To learn more about configuring these settings, read the [Coupons FAQ Guide](#).

Linking Manufacturer Coupon to tobacco product

This section shows how to link the coupon to the tobacco product.

| | |
|---|--|
|  <p>The image shows a menu with a yellow box labeled "Manager" and a blue box labeled "Options".</p> | <ol style="list-style-type: none">1. Select Manager or Options and enter the administrative credentials |
|  <p>The image shows a grid of menu items. A red box highlights the "Administrative" item (labeled 5). A red box also highlights the "Inventory Maintenance" item (labeled A).</p> | <ol style="list-style-type: none">2. Select Administrative3. Select Inventory Maintenance. |
|  <p>The image shows the "Inventory Maintenance" screen for the item "LuckyStrike \$1 Off". The "Tag Along Items" section has two checkboxes, both of which are checked and highlighted with red boxes.</p> | <ol style="list-style-type: none">4. Navigate to an item you'd like to add the Manufacturer coupon too.5. Select the Tag Along Check mark |

Search Inventory

| Item Number | Description | Price | Stock | Description 2 | Vendor Part Num |
|-------------|----------------|-------|-------|---------------|-----------------|
| 123456789 | \$1 off 1 Pack | -1.00 | 0 | PM | |

Keyboard

Modifiers

Modifier Groups

Choice Items

Kits

Rentals

Style Items

Serial Number Items

Add New Item

Category: No Category Selected | Department: No Department Select | Vendor: No Vendor Selected

Item Number
 Description
 Vendor Part Num
 Style
 Search Main Fields

Enter Search Text:

6. **Search** for the Manufacturer Coupon you'd like to apply to that item.
7. Select the coupon to highlight it in blue
8. Press **Select**

Inventory Maintenance

Item: LuckyStrike \$1 Off Print Labels Keyboard

Department for this Item: Phillip Morris
 Avg Cost: \$0.00000
 Tax
 Tax 4

Item Number: LuckyStrikeDis
 Price You Charge: \$9.50000
 Tax 2
 Tax 5

Description: LuckyStrike \$1 Off
 Price with tax: \$10.30
 Bar Tax
 Tax 6

2nd Description: PM USA
 # In Stock: 120

Click to Select Picture

Options Additional Info

Bonus Points: 0 # Barcodes: 0 Alternate SKUs: Tag Along Items: 123456789

Commission: % of Gross Profit: 0.0%

Modifier Item
 Exclude from Account Limit
 Check ID Before Selling
 Check ID #2 Before Selling
 Count This Item

Disable this Item
 Prompt Quantity
 Allow Buyback
 Print on Receipt

Foodstampable
 Auto-Weigh
 Use Serial/Batch #
 Special Permission

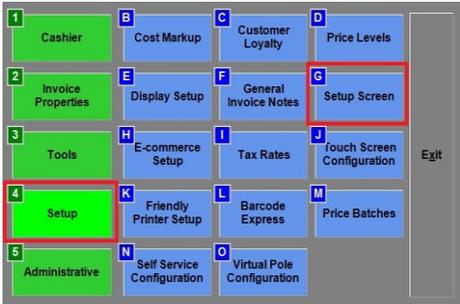
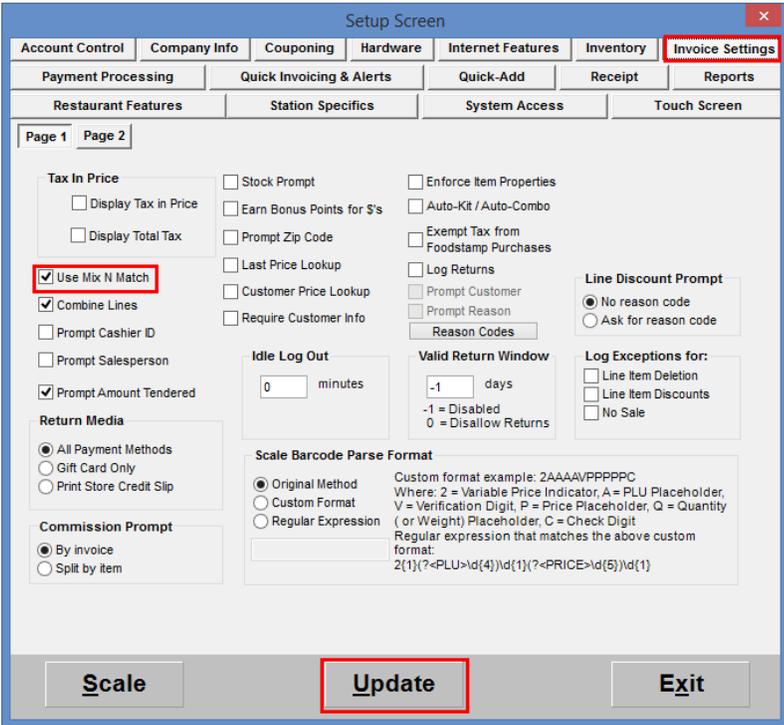
Location:
 Unit Size: 1 Unit Type: Pack

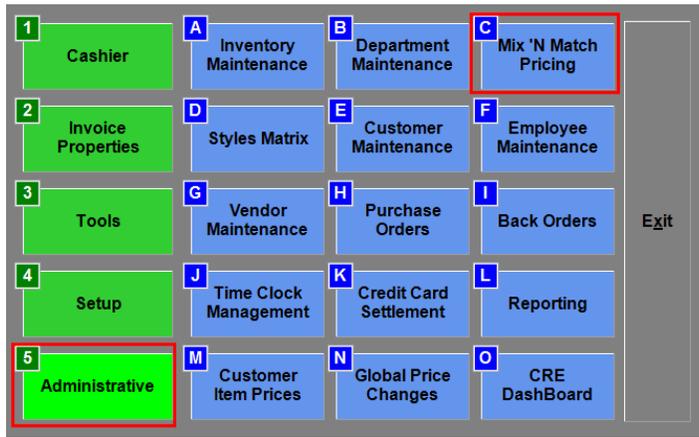
Search by Item Number:
 Profit%: 0%
 Retail Discount: 0%
 Gross Margin: 100.0%

9. Select **Save**

Adding a Multi-Pack Discount

This section will guide you through creating a Mix & Match group to trigger the multi-pack discount. You first must have the mix and match option selected.

| | |
|---|--|
|  <p>The image shows two buttons: a yellow 'Manager' button and a blue 'Options' button below it.</p> | <ol style="list-style-type: none">1. Select Manager or Options and enter the administrative credentials |
|  <p>The image shows a grid of menu items. Item 1 is 'Cashier', 2 is 'Invoice Properties', 3 is 'Tools', 4 is 'Setup', and 5 is 'Administrative'. Other items include 'Cost Markup', 'Customer Loyalty', 'Price Levels', 'Display Setup', 'General Invoice Notes', 'Setup Screen', 'E-commerce Setup', 'Tax Rates', 'Touch Screen Configuration', 'Friendly Printer Setup', 'Barcode Express', 'Price Batches', 'Self Service Configuration', and 'Virtual Pole Configuration'. An 'Exit' button is on the right.</p> | <ol style="list-style-type: none">2. Select Setup3. Select Setup Screen |
|  <p>The image shows the 'Setup Screen' with the 'Invoice Settings' tab selected. The 'Use Mix N Match' checkbox is checked. The 'Update' button is highlighted with a red box.</p> | <ol style="list-style-type: none">4. Select Invoice Settings Tab5. Select Use Mix N Match6. Select Update |



7. Select **Administrative** [5]
8. Select **Mix 'N Match Pricing** [C]



9. Select **Add Price Group**.

Screenshot of the "Mix 'N Match" form with numbered callouts 10-18. The form includes the following fields and controls:

- 10. Department: NONE
- 11. Price Group ID: PIMM4for2
- 12. Description: PM USA Multi-Pack
- 13. Quantity Required: 4
- 14. Amount to Discount: \$2.00
- 15. Start Date: 4/18/2019
- 16. End Date: 5/18/2019
- 16. Price Group Type: (dropdown)
- 16. Discount Amount: (dropdown)
- Tax 1, Tax 2, Tax 3, Tax 4, Tax 5, Tax 6, Foodstampable (checkboxes)
- 17. Add Item (button)
- Delete Item (button)
- 18. Save (button)
- Exit (button)
- Quick Help (button)
- Delete Price Group (button)

| Item Number | Item Name | Price |
|--------------|---------------|--------|
| Luckystrike1 | Lucky Strike1 | \$5.10 |
| Luckystrike2 | Lucky Strike2 | \$5.20 |

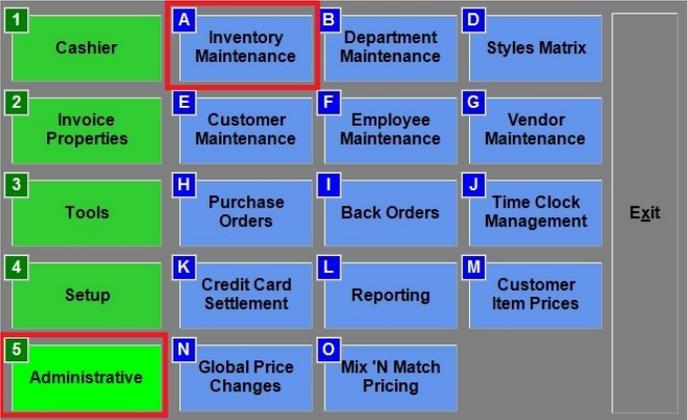
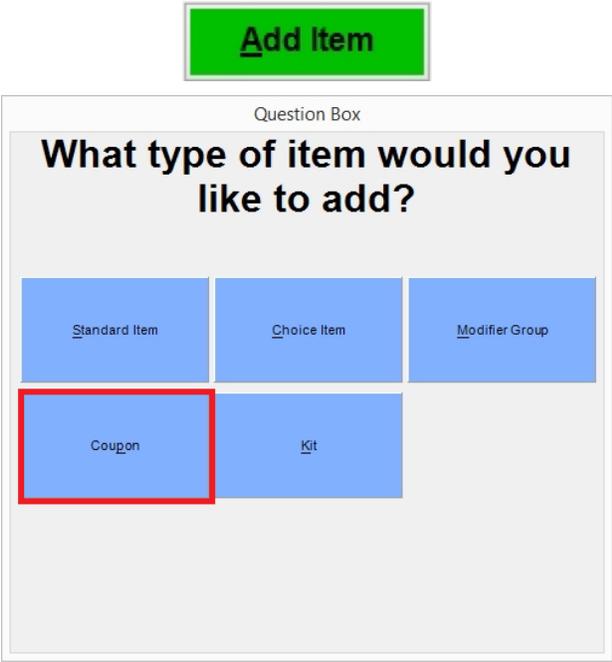
10. For **Department**, Select a Department other than the department of your tobacco products.
11. For **Price Group ID**, Enter an Alpha-numeric value.
12. For **Description** Enter Description required by Phillip Morris.
13. For **Quantity** required enter the # of items needed to trigger the discount.
14. For **Amount to Discount**, enter the discounted amount.
15. Configure the **Start** and **end dates**.
16. Select **Discount Amount** for Price Group Type.
17. Select **Add items and search** for the items to include in the price group.
18. Select **Save**

When a customer purchases the required quantity of items within the price group, the discount will automatically be applied to the invoice.

Configuring Loyalty Plan for Phillip Morris

Configure Loyalty plan coupon:

You must create a special coupon that only works with CRE's Loyalty Plan. Follow instructions below.

| | |
|---|---|
|  | <ol style="list-style-type: none">1. Select Manager or Options and enter the administrative credentials |
|  | <ol style="list-style-type: none">2. Select Administrative3. Select Inventory Maintenance. |
|  | <ol style="list-style-type: none">4. Select Add Item when the inventory maintenance screen appears5. Select Coupon when prompted |

Inventory Maintenance

Coupon: **LoyaltyPM \$1 Off** Print Labels Keyboard

Department for this item: **PM Coupons** Flat Amount Percent Tax Tax 4

Item Number: **LoyaltyPMCP** Tax 2 Tax 5

Description: **LoyaltyPM \$1 Off** Tax 3 Tax 6

2nd Description: **PM USA Loyalty MultiBuy Pl.** Click to Select Picture

Days Valid | Restrictions

| Rule | Type | Description | Include |
|------|------|-------------|---|
| | | | <input type="button" value="Include"/> <input type="button" value="Exclude"/> <input type="button" value="Exclusive"/> <input type="button" value="Delete"/> |

Minimum Amount: # Days Between Use:

Include all items besides above exceptions Suppress Bonus Points of Affected Items Allow on Deposit Invoices
 Apply only to parent items Apply to already discounted items
 Apply to items using special pricing **Only allow through bonus plan** Require Permission

Minimum Quantity For Bonus Plan:

Search by Item Number Profit%: 0% Retail Discount: 0% Gross Margin: 0%

6. For **Department**, Select a Department other than the department of your tobacco products.
7. **Item number**, Enter any Alpha-numeric value
8. Select Flat Amount
9. Discount Amount, Enter a negative value. Example: -1.00
10. Description, Enter a Description
11. **2nd Description, Must be the name given for the loyalty plan by Phillip Morris.**
12. Check option Only allow through bonus plan
13. Enter minimum quantity of items to trigger the loyalty plan.

Note: The 2nd description is what shows in the report in the loyalty column. This name must match Phillip Morris's name for the loyalty plan.



14. Select **Include**.

Question Box

What type of rule would you like to add?

15. Select either an item, department or category to include for triggering the coupon. This example, I selected departments.

- **Item:** Choose certain items from any department. One by one select
- **Department:** Choose the entire department of items. Multi-select
- **Category:** Choose Entire category of departments. Multi-select

Note: More details in this link on restrictions and other options. [Coupons FAQ Guide](#)

Select departments to include

| | | | | |
|--------|----------------|------------|------------|------------|
| NONE | Phillip Morris | PM Coupons | RJ Coupons | RJ Reynold |
| Snacks | Tobacco | | | |

16. Select **Department(s)** then
Click the **Select** button

Inventory Maintenance

Coupon: **LoyaltyPM \$1 Off**

Department for this Item: **PM Coupons** Flat Amount Percent Tax Tax 4
Item Number: LoyaltyPMCP Discount Amount: **(\$1.00)** Tax 2 Tax 5
Description: **LoyaltyPM \$1 Off** Tax 3 Tax 6
2nd Description: **PM USA Loyalty MultiBuy Pl** Tax 6
Click to Select Picture

Days Valid: Restrictions:

| Rule | Type | Description | |
|---------|------------|----------------|--|
| Include | Department | Phillip Morris | <input type="button" value="Include"/> |

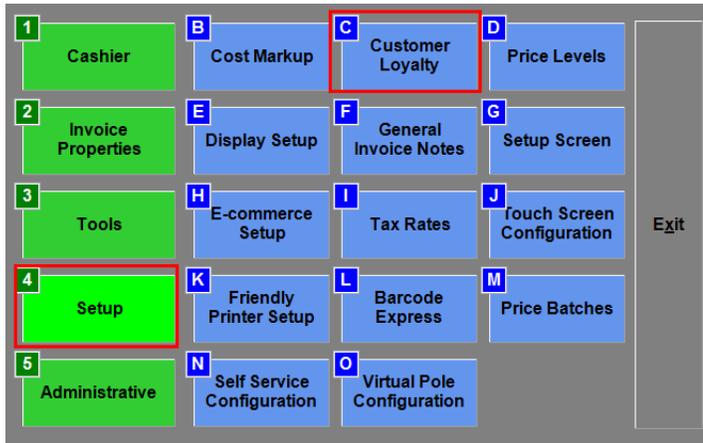
Minimum Amount: \$0.00 # Days Between Use: 0
 Include all items besides above exceptions Suppress Bonus Points of Affected Items Allow on Deposit Invoices
 Apply only to parent items Only allow through bonus plan Apply to already discounted items
 Apply to items using special pricing Require Permission
Minimum Quantity For Bonus Plan: 5

Search by Item Number: Profit%: 0% Retail Discount: 0% Gross Margin: 100.0%

17. Select **Save**

Create Loyalty incentive

In this section, you will be guide through the creation of the incentive for the tobacco loyalty plan

| | |
|---|---|
|  <p>A screenshot of a software menu with a grid of options. The 'Setup' option is highlighted with a red border. The 'Customer Loyalty' option is also highlighted with a red border. A vertical 'Exit' button is on the right side. The menu items are: 1. Cashier, 2. Invoice Properties, 3. Tools, 4. Setup, 5. Administrative, B. Cost Markup, E. Display Setup, H. E-commerce Setup, K. Friendly Printer Setup, N. Self Service Configuration, C. Customer Loyalty, F. General Invoice Notes, I. Tax Rates, L. Barcode Express, O. Virtual Pole Configuration, D. Price Levels, G. Setup Screen, J. Touch Screen Configuration, M. Price Batches.</p> | <p>Options Screen:</p> <ol style="list-style-type: none">1. Select Setup[4] Then Select Customer Loyalty[C] |
|  <p>A screenshot of a 'Question Box' with the text 'Which would you like to set up?'. There are two blue buttons: 'Loyalty Incentives' (highlighted with a red border) and 'Loyalty Plans'. A red 'Cancel' button is at the bottom left.</p> | <ol style="list-style-type: none">2. Select Loyalty Incentives |
|  <p>A green button with the text 'Add'.</p> | <ol style="list-style-type: none">3. Select Add |

Loyalty Incentives

Description: Incentive Type: **Keyboard**

Fire a coupon or sell an item every visit

Fire Coupon/Item

Click Below to Select the Coupon/Item to Fire

Currently Selected:
None

4. Enter any Description
5. Select **Fire Coupon/Item** for Incentive Type
6. Select **Coupon/Item**

Search Inventory

| Item Number | Description | Price | Stock | Description 2 | Vendor Part Num |
|-------------|-------------------|-------|-------|-----------------------------|-----------------|
| LoyaltyPMCP | LoyaltyPM \$1 Off | -1.00 | -7 | PM USA Loyalty MultBuy Plan | |

Category: Department: Vendor:

Item Number
 Description
 Vendor Part Num
 Style
 Search Main Fields

Current Selection: LoyaltyPMCP

Enter Search Text:

7. Search for the coupon create in the previous section. Highlight coupon and then click on the select button

Loyalty Incentives

Description: Incentive Type: **Keyboard**

Fire a coupon or sell an item every visit

Fire Coupon/Item

Click Below to Select the Coupon/Item to Fire

Currently Selected:
LoyaltyPMCP -- LoyaltyPM \$1 Off

8. Select the **Save** button

Loyalty Incentives

Description: PM USA Loyalty Plan Incentive Incentive Type: Fire Coupon/Item **Keyboard**

Fire a coupon or sell an item every visit

Fire Coupon/Item

Click Below to Select the Coupon/Item to Fire

Select Coupon/Item

Currently Selected:
LoyaltyPMCP-- LoyaltyPM\$1 Off

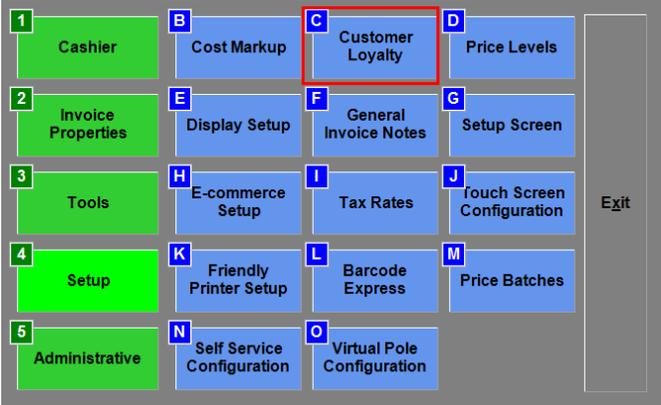
Previous PM USA Loyalty Plan Incentive Next

Add **Update** **Delete** **Exit**

9. Select the **Exit** button

Setup Loyalty Plan with the incentive

This section will guide you through the creation of a loyalty plan and attaching incentives to that plan. These Steps below are a continuation from the previous section.

| | |
|--|---|
|  <p>A screenshot of a software menu with five main categories on the left: 1 Cashier, 2 Invoice Properties, 3 Tools, 4 Setup, and 5 Administrative. Under 'Cashier', there are buttons for Cost Markup (B), Customer Loyalty (C), and Price Levels (D). Under 'Invoice Properties', there are Display Setup (E), General Invoice Notes (F), and Setup Screen (G). Under 'Tools', there are E-commerce Setup (H), Tax Rates (I), and Touch Screen Configuration (J). Under 'Setup', there are Friendly Printer Setup (K), Barcode Express (L), and Price Batches (M). Under 'Administrative', there are Self Service Configuration (N) and Virtual Pole Configuration (O). An 'Exit' button is on the right. The 'Customer Loyalty' button is highlighted with a red border.</p> | <p>1. Select Customer Loyalty[C]</p> |
|  <p>A screenshot of a 'Question Box' dialog with the text 'Which would you like to set up?'. There are two buttons: 'Loyalty Incentives' and 'Loyalty Plans'. The 'Loyalty Plans' button is highlighted with a red border. There is also a 'Cancel' button in the bottom left corner.</p> | <p>2. Select Loyalty Plans</p> |
|  <p>A screenshot of a green button with the text 'Add' in black.</p> | <p>3. Select Add button</p> |

Loyalty Plans

Description Keyboard

PM Loyalty Plan Accumulate Points ?

Loyalty Items

| Description | ID | Details | Exclusive | Override | Prompt |
|-------------|----|---------|-----------|----------|--------|
| | | | | | |

Add Incentive
Delete Incentive
▲
▼

Previous
Next

Save
Update
Cancel
Exit

4. Enter any name for the Description
5. Select **Add Incentive**

Which incentive would you like to include in this plan?

PMCouponFire

PM USA Loyalty Plan Incentive

rgergerg

Cancel
Select

6. Select the Incentive just created

Loyalty Plans

Description Keyboard

PM Loyalty Plan Accumulate Points ?

Loyalty Items

| Description | ID | Details | Exclusive | Ove |
|-------------------------------|----|---------|-------------------------------------|-----|
| PM USA Loyalty Plan Incentive | 2 | 0 | <input checked="" type="checkbox"/> | |
| PMCouponFire | 1 | 0 | <input type="checkbox"/> | |

Add Incentive
Delete Incentive
▲
▼

Previous
Next

Save
Update
Cancel
Exit

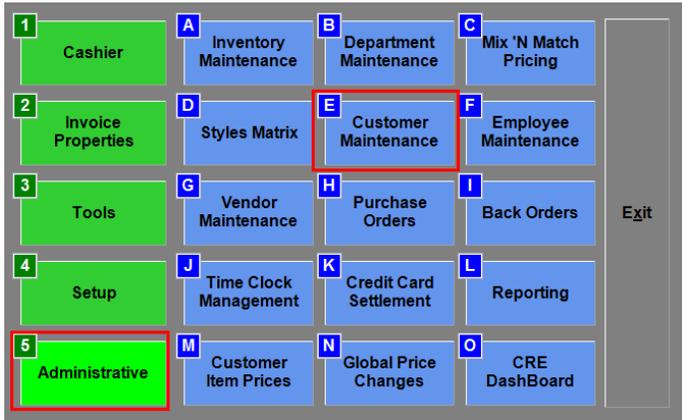
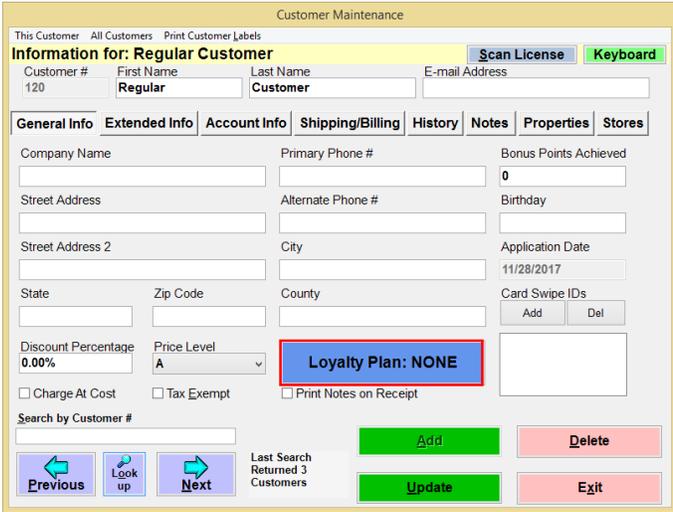
7. Once you have all your incentives added, then select save.

Note: you can have multiple incentive associated with one loyalty plan. **You Must have check the exclusive for the primary incentive.**

| Description | ID | Details | Exclusive |
|-------------------------------|----|---------|-------------------------------------|
| PM USA Loyalty Plan Incentive | 2 | 0 | <input checked="" type="checkbox"/> |
| PMCouponFire | 1 | 0 | <input type="checkbox"/> |

Applying the Loyalty plan to a customer

This section, you will be shown how to associate the plan to the customer. This is a continuation from the previous section.

| | |
|---|--|
|  <p>A screenshot of a software menu. The menu items are arranged in a grid. On the left side, there are five green buttons labeled 1 through 5: 'Cashier', 'Invoice Properties', 'Tools', 'Setup', and 'Administrative'. The 'Administrative' button is highlighted with a red border. In the main grid, there are blue buttons labeled A through O. The 'Customer Maintenance' button (labeled E) is highlighted with a red border. An 'Exit' button is located on the right side of the menu.</p> | <ol style="list-style-type: none">1. Select Administrative[5] Then Select Customer Maintenance[E] |
|  <p>A screenshot of the 'Customer Maintenance' form. The form has a title bar 'Customer Maintenance' and a navigation bar with 'Scan License' and 'Keyboard' buttons. Below the title bar, there is a section for 'Information for: Regular Customer' with fields for Customer # (120), First Name (Regular), Last Name (Customer), and E-mail Address. There are several tabs: 'General Info', 'Extended Info', 'Account Info', 'Shipping/Billing', 'History', 'Notes', 'Properties', and 'Stores'. The 'General Info' tab is active. In the 'Loyalty Plan' field, the value is 'NONE', which is highlighted with a red border. There are 'Add' and 'Delete' buttons at the bottom right. A search bar is at the bottom left with 'Previous', 'Look up', and 'Next' buttons. A status bar at the bottom right says 'Last Search Returned 3 Customers'.</p> | <ol style="list-style-type: none">2. Search for the customer you want to add to the Phillip Morris's Loyalty plan.3. Select the Loyalty Plan button |
|  <p>A screenshot of a dialog box titled 'Please select the loyalty plan'. It contains two buttons: 'PM Loyalty Plan' and 'None'. The 'PM Loyalty Plan' button is highlighted with a red border. At the bottom of the dialog, there are 'Cancel' and 'Select' buttons.</p> | <ol style="list-style-type: none">4. Select the Loyalty plan |

Customer Maintenance

This Customer All Customers Print Customer Labels

Information for: Regular Customer [Scan License](#) [Keyboard](#)

Customer # 120 First Name Regular Last Name Customer E-mail Address

General Info | **Extended Info** | **Account Info** | **Shipping/Billing** | **History** | **Notes** | **Properties** | **Stores**

Company Name Primary Phone # Bonus Points Achieved 0

Street Address Alternate Phone # Birthday

Street Address 2 City Application Date 11/28/2017

State Zip Code County Card Swipe IDs Add Del

Discount Percentage 0.00% Price Level A **Loyalty Plan: PM Loyalty Plan**

Charge At Cost Tax Exempt Print Notes on Receipt

Search by Customer #

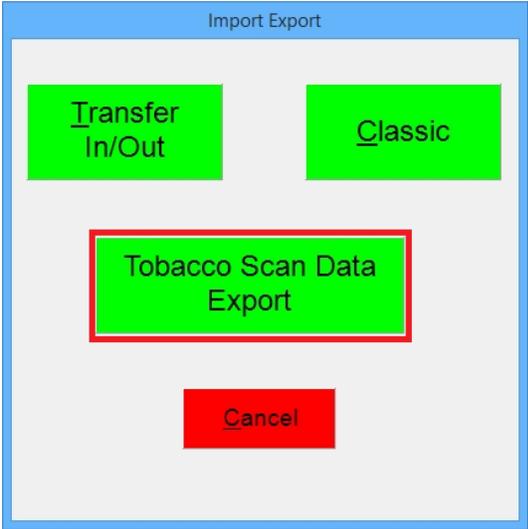
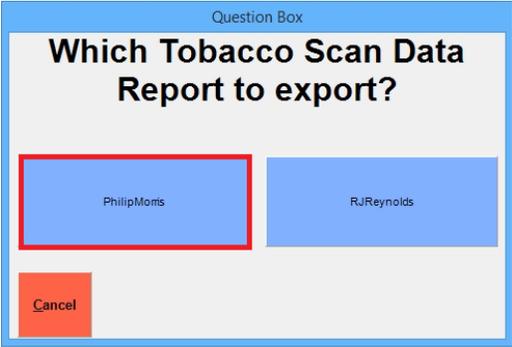
[Previous](#) [Look up](#) [Next](#) Last Search Returned 3 Customers

[Add](#) [Delete](#)
[Update](#) [Exit](#)

5. Select Update

Note: Now the Loyalty plan is associated with the customer. Loyalty Plan will be applied to the invoice after you select pay from the invoice screen.

Performing an Export

| | |
|---|--|
|  <p>A screenshot showing a yellow box labeled "Manager" above a blue box labeled "Options".</p> | <ol style="list-style-type: none">1. Select Manager or Options and enter the administrative credentials |
|  <p>A screenshot of a menu with various options. The "Tools" option is highlighted with a red box. Other options include Cashier, Invoice Properties, ASCII Transfer, Labor Scheduler, Inventory Transfer, Payroll, Wage Calculator, Quickbooks Sales Pass, Scheduler, Cash Pullout, Vendor Payouts, Setup, Serial/Batch Number Tracking, Send Mass E-Mail, Inventory Track Express, and Administrative. An "Exit" button is also visible.</p> | <ol style="list-style-type: none">1. Select Tools2. Select ASCII Transfer3. Enter the administrative password |
|  <p>A screenshot of a dialog box titled "Import Export". It contains two buttons: "Transfer In/Out" and "Classic". Below them is a button labeled "Tobacco Scan Data Export" which is highlighted with a red box. At the bottom is a "Cancel" button.</p> | <ol style="list-style-type: none">5. Select Tobacco Scan Data Export |
|  <p>A screenshot of a dialog box titled "Question Box" with the question "Which Tobacco Scan Data Report to export?". It contains two buttons: "PhilipMorris" and "RJReynolds". The "PhilipMorris" button is highlighted with a red box. At the bottom left is a "Cancel" button.</p> | <ol style="list-style-type: none">6. Select PhilipMorris |

PhilipMorris Export

Account Number

WeekEnding

Folder

Select Department

1

NONE

The Philip Morris Export screen shown above contains the following configuration options.

- **Account Number** - Also known as the **Retail Control Number** or **Management Account Number**, is **required** by Philip Morris in order to issue refunds for manufacturer coupons.
- **Week Ending Date** - determines what week of sales data is included in the export. See image below for more information for choosing the correct date.
- **Folder** - this shows where the export file will be created in Windows. You change this location by select the **Browse** button and choosing where a new folder location.
- **Select Department** - determines what items are included in the export. It is highly recommended that you separate your types of tobacco products into different departments. Chewing Tobacco, Cigarettes, Cigars, Vape products should all have their own departments.
- **Generate** - creates the report in the specified folder, if a file already exists with the same week ending date, you'll be prompted to confirm that you want to overwrite the file.

7. After you've configured the settings above, select the **Generate** button. This will create a .txt file with your store name and the selected week ending date as the name of the file. Example; Myliquorstore20171210.txt

Account Number

WeekEnding

Folder

December 2017

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| 26 | 27 | 28 | 29 | 30 | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 31 | 1 | 2 | 3 | 4 | 5 | 6 |

Today: 12/1/2017

For the Week Ending Date, select any date for the entire weeks' worth of sales data to include in the export. For **Philip Morris**, the sales data for all transactions that contain tobacco products **starting** on **Sunday** and ending on **Saturday** are required. As an example, if I select Thursday December 7th, it will automatically specify the week ending on Saturday December 9th. The sales data from December 3rd through December 9th is included in the export.