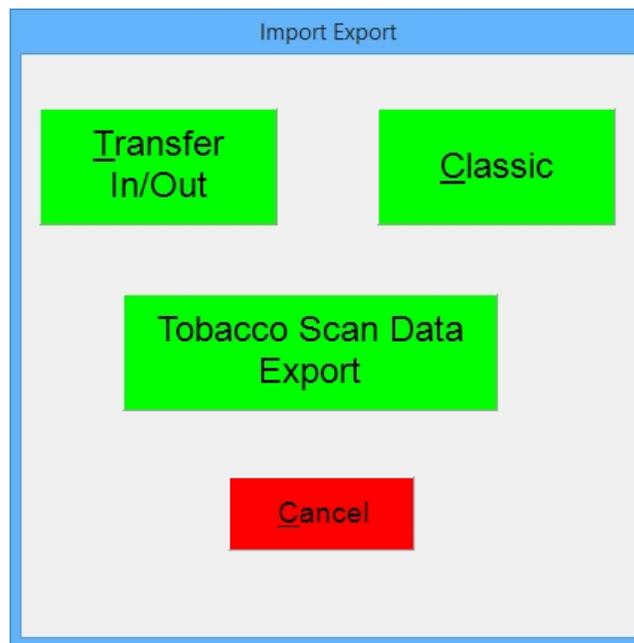


## TOBACCO SCAN DATA TOOL for PHILIP MORRIS & U.S. SMOKELESS TOBACCO COMPANY



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:

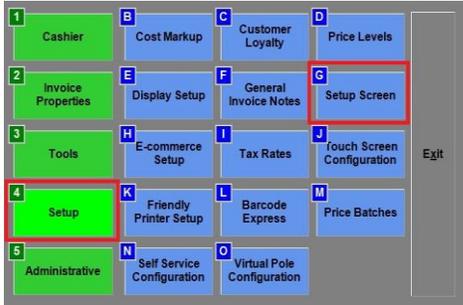
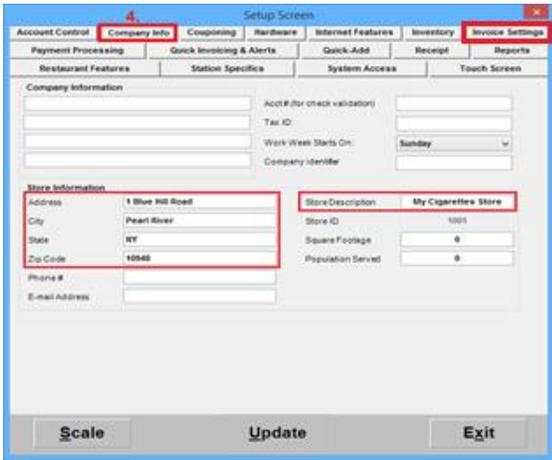
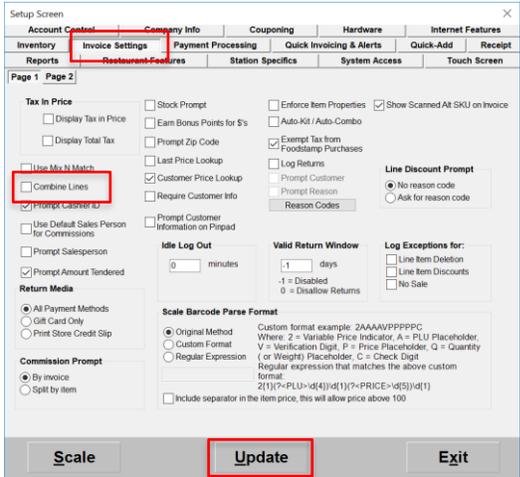
- CRE Version **12.80271** or newer **must be installed** in order to use this feature.
- **Before using this feature**, a retailer must contact an Altria Group Distribution Company representative to **register** their business to participate in the **Philip Morris (PM USA)** and/or **U.S. Smokeless Tobacco Company (USSTC)** Scan Data Programs. 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** and/or **USSTC** 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.
- As of CRE Version **12.9019**, you have the ability to use **Philip Morris** loyalty plans with customers.
- As of CRE Version **14.1010**, you have the ability to use **USSTC** loyalty plans with customers.

## **Revision History**

<b>CRE Version</b>	<b>Date</b>	<b>Author</b>	<b>Description of Changes</b>
12.80271	March 8, 2018	MP	1st Release
12.1019	April 23, 2019	JC	Adding Multi-pack and loyalty Configurations.
13.1026	February 2, 2021	BG	Automatically Applied Mix 'n' Match Discounts
14.1009	July 16, 2021	BG	Combine Lines flag note
14.1010	August 9, 2021	BG	Add USSTC

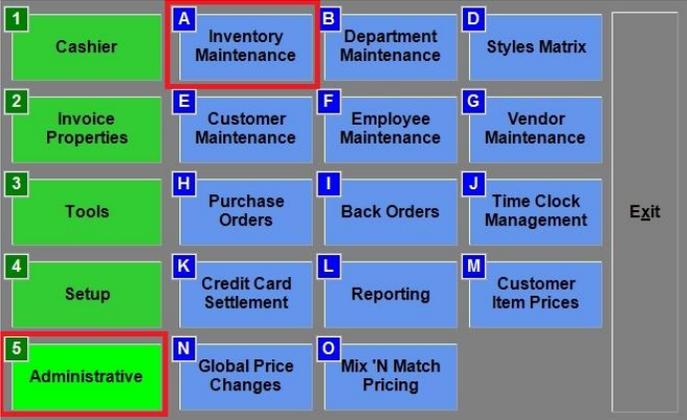
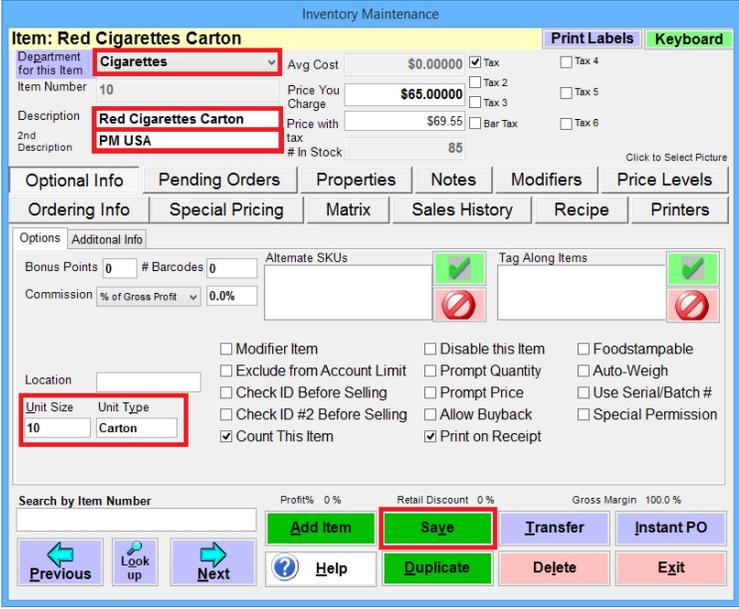
## Setting Up your Store Information

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.

 <p style="text-align: center;"><b>Manager</b></p> <p style="text-align: center;"><u>Options</u></p>	<ol style="list-style-type: none"> <li>1. Select <b>Manager</b> or <b>Options</b> and enter the administrative credentials</li> </ol>
 <p>1 Cashier 2 Invoice Properties 3 Tools 4 Setup 5 Administrative</p> <p>B Cost Markup E Display Setup H E-commerce Setup K Friendly Printer Setup N Self Service Configuration</p> <p>C Customer Loyalty F General Invoice Notes I Tax Rates L Barcode Express O Virtual Pole Configuration</p> <p>D Price Levels G Setup Screen J Touch Screen Configuration M Price Batches</p> <p>Exit</p>	<ol style="list-style-type: none"> <li>2. Select <b>Setup</b></li> <li>3. Select <b>Setup Screen</b></li> </ol>
 <p>Setup Screen - Company Info tab</p> <p>Company Information fields: Account #, Tax ID, Work Week Start On (Sunday), Company Identifier</p> <p>Store Information fields: Address (1 Blue Hill Road), City (Pearl River), State (NY), Zip Code (10948), Store Description (My Cigarettes Store), Store ID (1001), Square Footage (0), Population Served (0)</p> <p>Buttons: Scale, Update, Exit</p>	<ol style="list-style-type: none"> <li>4. Select the <b>Company Info</b> tab</li> <li>5. Under the <b>Store Information</b> section enter your store's information in the following fields: <ul style="list-style-type: none"> <li>● Store Description (<b>your store's name</b>)</li> <li>● Address</li> <li>● City</li> <li>● State (<b>CAPITAL LETTERS ONLY</b>)</li> <li>● Zip Code</li> </ul> </li> </ol>
 <p>Setup Screen - Invoice Settings tab</p> <p>Invoice Settings fields: Tax in Price, Stock Prompt, Earn Bonus Points for \$'s, Prompt Zip Code, Last Price Lookup, Customer Price Lookup, Require Customer Info, Prompt Customer Information on Pickup, Idle Log Out (0 minutes), Valid Return Window (-1 days, -1 Disabled, 0 = Disallow Returns), Log Exceptions for: Line Item Deletion, Line Item Discounts, No Sale</p> <p>Buttons: Scale, Update, Exit</p>	<ol style="list-style-type: none"> <li>6. Select <b>Invoice Settings</b></li> <li>7. To ensure accuracy in your scan data exports, we suggest turning OFF the <b>Combine Lines</b> setting</li> <li>8. Select <b>Update</b></li> </ol>

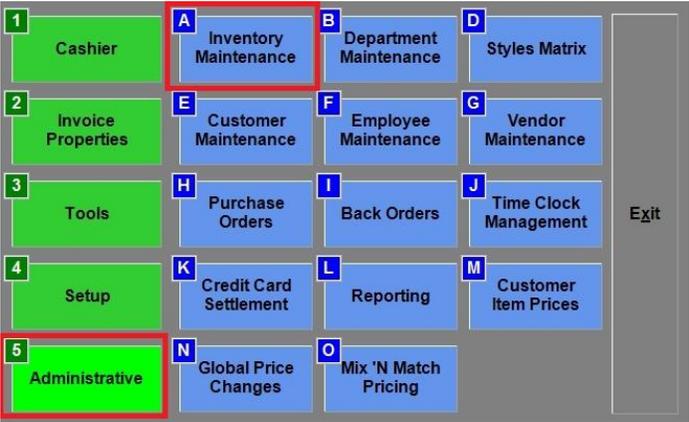
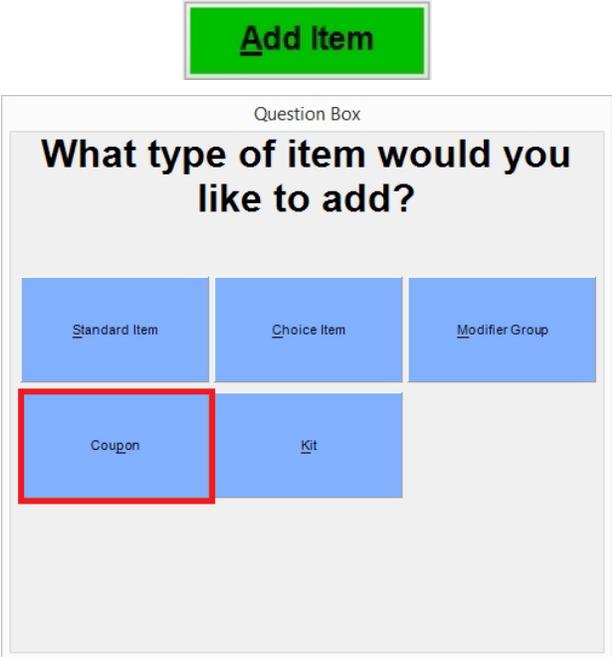
## Philip Morris / USSTC - Configuring Consumer Units

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 and USSTC require** 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.

 <p>The image shows a menu with two options: 'Manager' in a yellow box and 'Options' in a blue box.</p>	<ol style="list-style-type: none"><li>1. Select <b>Manager</b> or <b>Options</b> and enter the administrative credentials</li></ol>
 <p>The image shows a grid of administrative menu items. A red box highlights the 'Administrative' item (labeled 5). Other items include Cashier, Invoice Properties, Tools, Setup, Inventory Maintenance (labeled A), Customer Maintenance (labeled E), Purchase Orders (labeled H), Credit Card Settlement (labeled K), Global Price Changes (labeled N), Department Maintenance (labeled B), Employee Maintenance (labeled F), Back Orders (labeled I), Reporting (labeled L), Mix 'N Match Pricing (labeled O), Styles Matrix (labeled D), Vendor Maintenance (labeled G), Time Clock Management (labeled J), and Customer Item Prices (labeled M). An 'Exit' button is on the right.</p>	<ol style="list-style-type: none"><li>2. Select <b>Administrative</b></li><li>3. Select <b>Inventory Maintenance</b>.</li></ol>
 <p>The image shows the 'Inventory Maintenance' form for 'Red Cigarettes Carton'. The 'Department for this Item' is set to 'Cigarettes' (highlighted with a red box). The 'Description' is 'Red Cigarettes Carton' and the '2nd Description' is 'PM USA' (both highlighted with red boxes). The 'Unit Size' is '10' and the 'Unit Type' is 'Carton' (both highlighted with a red box). The 'Save' button is highlighted with a red box. Other fields include Avg Cost (\$0.00000), Price You Charge (\$65.00000), Price with tax (\$69.55), and # In Stock (85). There are various checkboxes for tax, modifiers, and printing options.</p>	<ol style="list-style-type: none"><li>4. Navigate to the item that needs to be configured.</li><li>5. For <b>Department for this item</b> select a department. This department must match the selected department during the export to include the item.</li><li>6. In the <b>Unit Size</b> specify the number of packs within the carton.</li><li>7. In the <b>Unit Type</b> specify the container of the item. Example (Carton, Roll, Pack, etc.)</li><li>8. For <b>Second Description</b> Enter (PM USA or Philip Morris or USSTC) to indicate the manufacturer of the item.</li><li>9. Select <b>Save</b></li></ol>

## 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"><li>1. Select <b>Manager</b> or <b>Options</b> and enter the administrative credentials</li></ol>
	<ol style="list-style-type: none"><li>2. Select <b>Administrative</b></li><li>3. Select <b>Inventory Maintenance</b>.</li></ol>
	<ol style="list-style-type: none"><li>4. Select <b>Add Item</b> when the inventory maintenance screen appears</li><li>5. Select <b>Coupon</b> when prompted</li></ol>

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%

[Previous](#) [Look up](#) [Next](#) [Save](#) [Save](#) [Transfer](#) [Instant PO](#)

[Help](#) [Duplicate](#) [Delete](#) [Cancel](#)

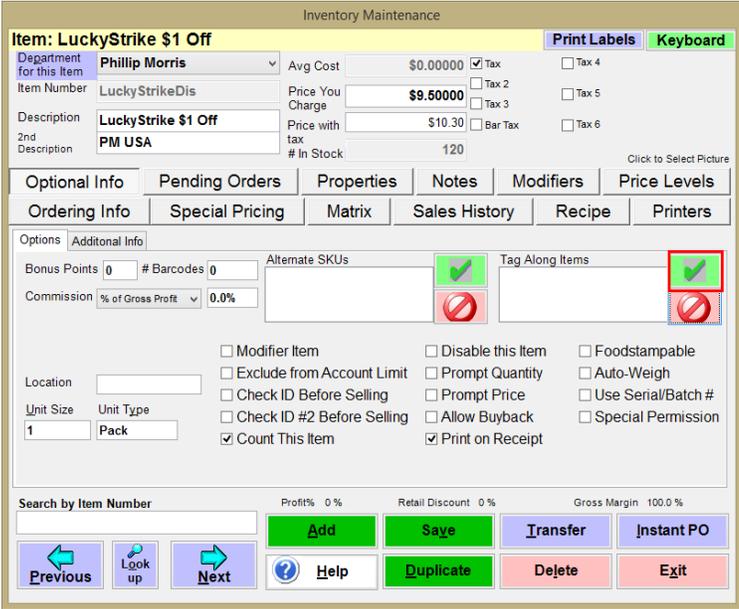
7. Configure the Coupon item with the following settings:

- 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"><li>1. Select <b>Manager</b> or <b>Options</b> and enter the administrative credentials</li></ol>
 <p>The image shows a grid of menu items. A red box highlights the "Administrative" item (labeled 5) and the "Inventory Maintenance" item (labeled A). Other items include Cashier, Invoice Properties, Tools, Setup, Customer Maintenance, Purchase Orders, Credit Card Settlement, Global Price Changes, Department Maintenance, Employee Maintenance, Back Orders, Reporting, Styles Matrix, Vendor Maintenance, Time Clock Management, Customer Item Prices, and Mix 'N Match Pricing. An "Exit" button is on the right.</p>	<ol style="list-style-type: none"><li>2. Select <b>Administrative</b></li><li>3. Select <b>Inventory Maintenance</b>.</li></ol>
 <p>The image shows the "Inventory Maintenance" screen for the item "LuckyStrike \$1 Off". The screen includes fields for Department (Phillip Morris), Item Number (LuckyStrikeDis), Description (LuckyStrike \$1 Off), and Price You Charge (\$9.60000). It also has various checkboxes for tax, bar tax, and other options. The "Tag Along Items" checkbox is checked and highlighted with a red box. At the bottom, there are buttons for "Add", "Save", "Transfer", "Instant PO", "Previous", "Look up", "Next", "Help", "Duplicate", "Delete", and "Exit".</p>	<ol style="list-style-type: none"><li>4. Navigate to an item you'd like to add the Manufacturer coupon too.</li><li>5. Select the Tag Along Check mark</li></ol>

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  

Optional Info   Pending Orders   Properties   Notes   Modifiers   Price Levels

Ordering Info   Special Pricing   Matrix   Sales History   Recipe   Printers

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  
 Disable this Item  
 Foodstampable

Check ID Before Selling  
 Check ID #2 Before Selling  
 Count This Item  
 Prompt Quantity  
 Prompt Price  
 Auto-Weigh

Use Serial/Batch #  
 Special Permission  
 Print on Receipt

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

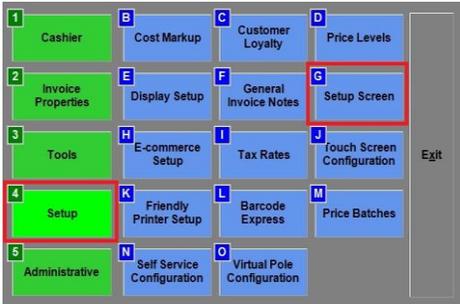
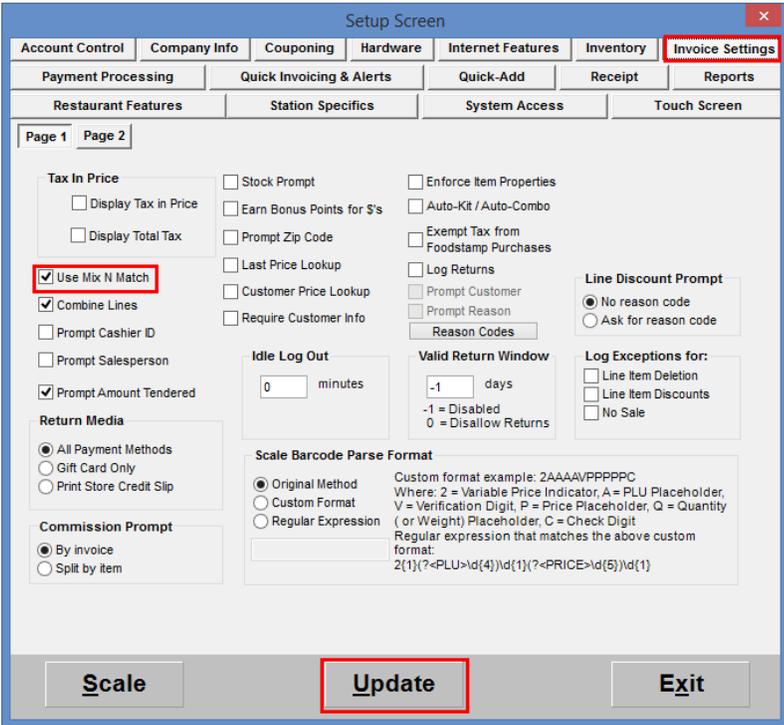
 
  
  
  
  
  

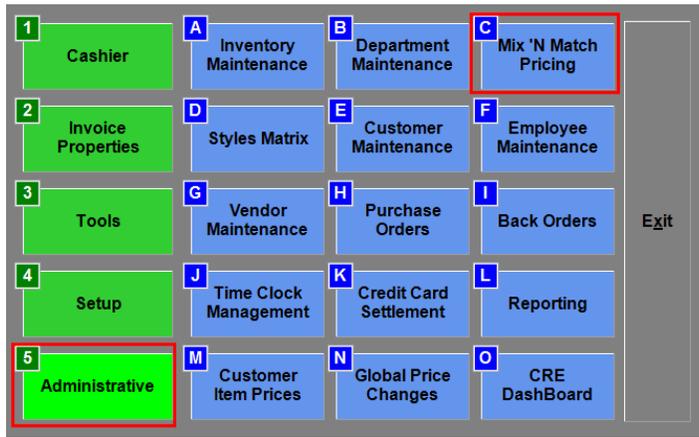
 
  
  

9. Select **Save**

## 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"><li>1. Select <b>Manager</b> or <b>Options</b> and enter the administrative credentials</li></ol>
 <p>The image shows a grid of menu items. 'Setup' (4) and 'Setup Screen' (G) are highlighted with red boxes. Other items include Cashier, Invoice Properties, Tools, Administrative, Cost Markup, Display Setup, E-commerce Setup, Friendly Printer Setup, Self Service Configuration, Customer Loyalty, General Invoice Notes, Tax Rates, Barcode Express, Price Levels, Touch Screen Configuration, and Price Batches.</p>	<ol style="list-style-type: none"><li>2. Select <b>Setup</b></li><li>3. Select <b>Setup Screen</b></li></ol>
 <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"><li>4. Select <b>Invoice Settings</b> Tab</li><li>5. Select <b>Use Mix N Match</b></li><li>6. Select <b>Update</b></li></ol>



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



9. Select **Add Price Group**.

**Mix 'N Match**

Department: NONE (10)

Price Group ID: PIMM4for2 (11)

Quantity Required: 4 (13)

Start Date: 4/18/2019

Price Group Type: (16)

Discount Amount: (16)

Description: PM USA Multi-Pack (12)

Amount to Discount: \$2.00 (14)

End Date: 5/18/2019 (15)

Tax 1  Tax 2  Tax 3  Foodstampable   
 Tax 4  Tax 5  Tax 6

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

Buttons: Add Price Group, Quick Help, Delete Price Group, Save (18), Add Item (17), Delete Item, Exit

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 Philip Morris or USSTC.
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.

## Automatically Applied Mix 'n' Match Discounts

As of version 13.1026, CRE allows merchants to configure once-per-transaction Mix and Match discounts to be applied automatically when invoice requirements are met. This ensures that these discounts are applied consistently and only once per qualifying instance, based on defined Mix and Match groups.

The screenshot shows the 'Mix 'N Match' configuration interface. It includes the following elements:

- Department:** MixNMatch (dropdown)
- Price Group ID:** Discount Amount (text input)
- Quantity Required:** 2 (text input)
- Start Date:** 3/15/2012 (text input)
- Price Group Type:** Discount Amount (dropdown)
- Description:** Discount Amount (text input)
- Amount to Discount:** \$1.99 (text input)
- End Date:** 3/15/2021 (text input)
- Tax Options:**  Tax 1,  Tax 2,  Tax 3,  Foodstampable,  Tax 4,  Tax 5,  Tax 6
- Apply discounts only once per invoice:**  (highlighted with a red box)
- Items in Group:** A table with columns: Item Number, Item Name, Price.

Item Number	Item Name	Price
Item A1	Item A1	\$7.99
Item A2	Item A2	\$7.99
- Buttons:** Add Item (green), Delete Item (pink), Add Price Group (green), Quick Help (white), Search for an Existing Price Group (white), Delete Price Group (pink), Save (yellow), Exit (pink), and a dropdown menu for 'Discount Amount -- Discount Amount'.

To use this feature, go to the **Mix 'N Match Pricing** screen of the main **Setup** screen. There, you will find a checkbox to **Apply discounts only once per invoice**.

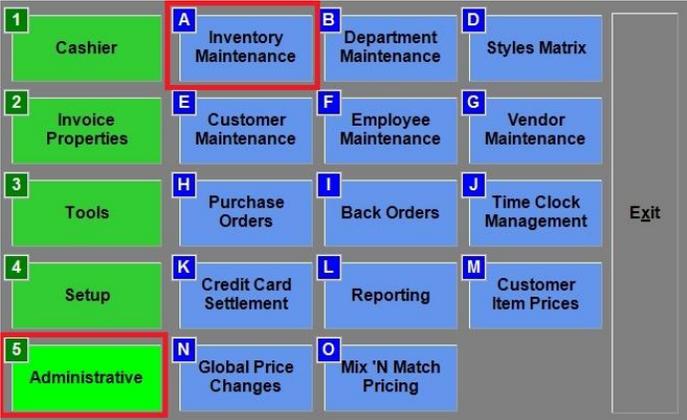
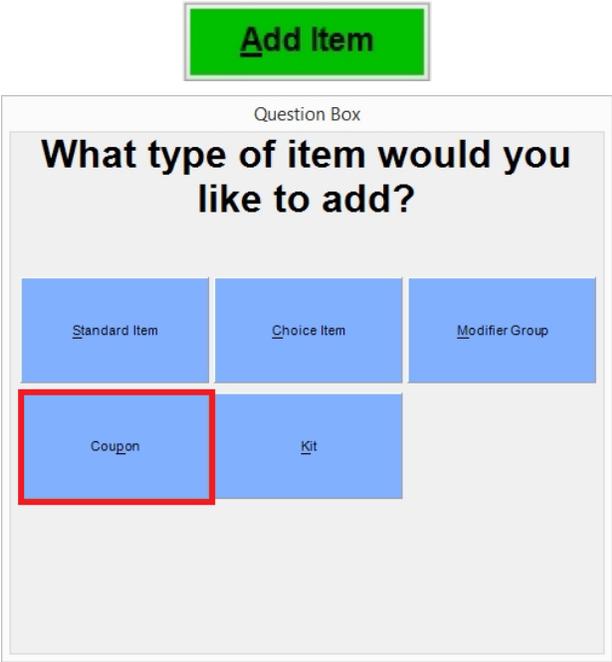
With this box checked, CRE will automatically apply discounts as demonstrated in the following examples:

- ▶ Merchant sets up a new Mix and Match group called MnM1 that includes two items, Item1 and Item2, and with a discount of \$1 when two or more qualifying items are sold. Merchant adds two or more qualifying items, and CRE applies a single \$1 discount, regardless of how many multiples of two are purchased.
- ▶ Merchant sets up a new Mix and Match group called MnM2 that includes two items, Item3 and Item4, and with a discount of \$2 when two or more qualifying items are sold. Merchant adds two or more qualifying items, and CRE applies a single \$2 discount, regardless of how many multiples of two are purchased.
- ▶ Merchant adds two or more items from each of the above Mix and Match groups and CRE automatically applies a \$1 discount MnM1 and a \$2 discount for MnM2.

## Configuring Loyalty Plan for Philip Morris / USSTC

### 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"><li>1. Select <b>Manager</b> or <b>Options</b> and enter the administrative credentials</li></ol>
	<ol style="list-style-type: none"><li>2. Select <b>Administrative</b></li><li>3. Select <b>Inventory Maintenance</b>.</li></ol>
	<ol style="list-style-type: none"><li>4. Select <b>Add Item</b> when the inventory maintenance screen appears</li><li>5. Select <b>Coupon</b> when prompted</li></ol>

Inventory Maintenance

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

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.** 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: \$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  Apply to already discounted items  
 Apply to items using special pricing  **Only allow through bonus plan**  Require Permission  
 Minimum Quantity For Bonus Plan: **5**

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. **2<sup>nd</sup> Description, Must be the name given for the loyalty plan by Philip Morris or USSTC.**
12. Check option Only allow through bonus plan
13. Enter minimum quantity of items to trigger the loyalty plan.

**Note: The 2<sup>nd</sup> description is what shows in the report in the loyalty column. This name must match Philip Morris's or USSTC'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 3  Tax 5  Tax 6  
Description: **LoyaltyPM \$1 Off**  
2nd Description: **PM USA Loyalty MultiBuy Pl** Click to Select Picture

Days Valid:  Restrictions:

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

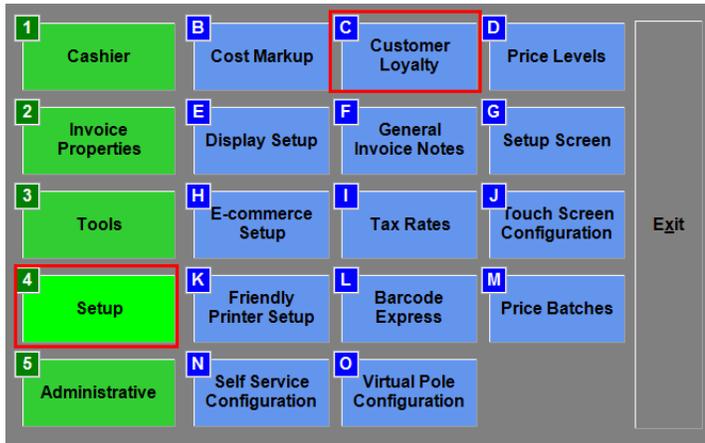
Minimum Amount: \$0.00 # Days Between Use: 0  
 Include all items besides above exceptions  Suppress Bonus Points of Affected Items  Allow on Deposit Invoices  
 Apply only to parent items  Only allow through bonus plan  Apply to already discounted items  
 Apply to items using special pricing Minimum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

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 various options. The 'Setup' option is highlighted with a red border and labeled '4'. The 'Customer Loyalty' option is also highlighted with a red border and labeled 'C'. Other options include Cashier, Invoice Properties, Tools, Administrative, Cost Markup, Display Setup, E-commerce Setup, Friendly Printer Setup, Self Service Configuration, Price Levels, General Invoice Notes, Tax Rates, Barcode Express, Price Batches, Touch Screen Configuration, and Virtual Pole Configuration. An 'Exit' button is located on the right side.</p>	<p>Options Screen:</p> <ol style="list-style-type: none"><li>1. Select <b>Setup</b>[4] Then Select <b>Customer Loyalty</b>[C]</li></ol>
 <p>A screenshot of a 'Question Box' with the text 'Which would you like to set up?'. There are two buttons: 'Loyalty Incentives' (highlighted with a red border) and 'Loyalty Plans'. A 'Cancel' button is located at the bottom left.</p>	<ol style="list-style-type: none"><li>2. Select <b>Loyalty Incentives</b></li></ol>
 <p>A green button with the text 'Add'.</p>	<ol style="list-style-type: none"><li>3. Select <b>Add</b></li></ol>

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:

**Keyboard**

- Modifiers
- Modifier Groups
- Choice Items
- Kits
- Rentals
- Style Items
- Serial Number Items
- Add New Item

**Help**

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

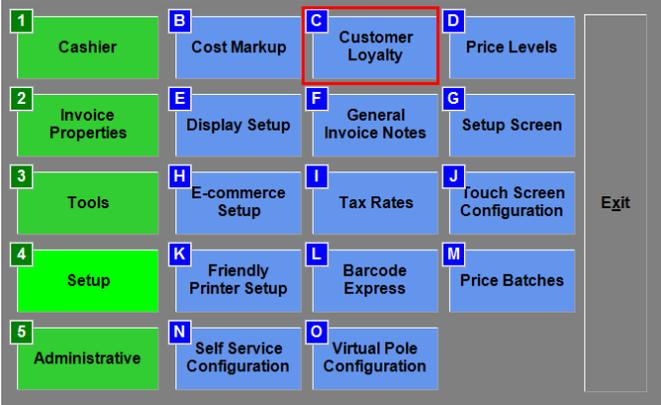
Previous      PM USA Loyalty Plan Incentive      Next

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

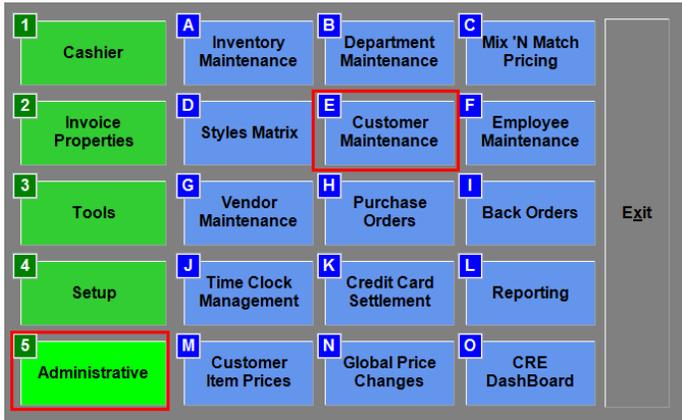
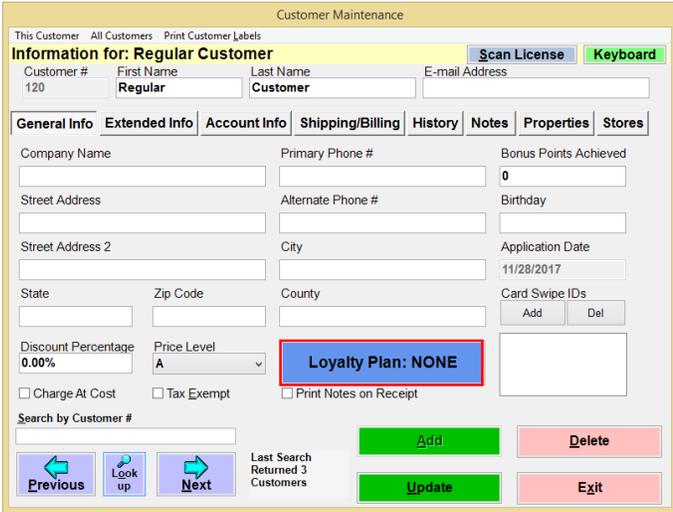
7. Once you have all your incentives added, then select save.

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 with various options. The 'Administrative' option is highlighted with a red box and labeled '5'. The 'Customer Maintenance' option is highlighted with a red box and labeled 'E'. Other options include Cashier, Invoice Properties, Tools, Setup, Inventory Maintenance, Styles Matrix, Vendor Maintenance, Time Clock Management, Customer Item Prices, Department Maintenance, Purchase Orders, Credit Card Settlement, Global Price Changes, Mix 'N Match Pricing, Employee Maintenance, Back Orders, Reporting, and CRE DashBoard. An 'Exit' button is also visible.</p>	<ol style="list-style-type: none"><li>1. Select <b>Administrative</b>[5] Then Select <b>Customer Maintenance</b>[E]</li></ol>
 <p>A screenshot of the 'Customer Maintenance' form. The 'Loyalty Plan' field is highlighted with a red box and contains the text 'Loyalty Plan: NONE'. The form includes fields for Customer #, First Name, Last Name, E-mail Address, Company Name, Primary Phone #, Bonus Points Achieved, Street Address, Alternate Phone #, Birthday, Street Address 2, City, Application Date, State, Zip Code, County, Card Swipe IDs, Discount Percentage, Price Level, Charge At Cost, Tax Exempt, and Print Notes on Receipt. There are also buttons for 'Add', 'Delete', 'Update', and 'Exit'.</p>	<ol style="list-style-type: none"><li>2. Search for the customer you want to add to the Philip Morris or USSTC loyalty plan.</li><li>3. Select the Loyalty Plan button</li></ol>
 <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 box. At the bottom of the dialog box, there are 'Cancel' and 'Select' buttons.</p>	<ol style="list-style-type: none"><li>4. Select the Loyalty plan</li></ol>

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  
 Street Address Alternate Phone # Birthday  
 Street Address 2 City Application Date  
 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

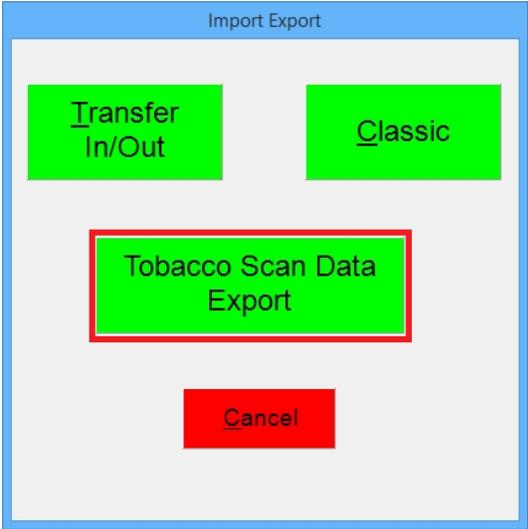
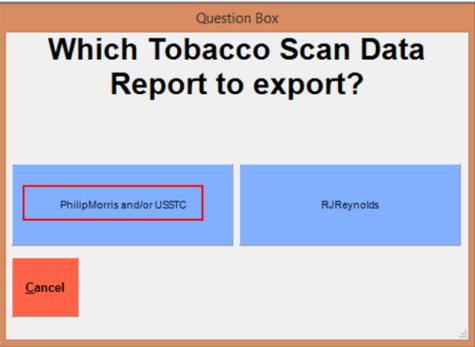
Search by Customer #

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>The screenshot shows a yellow box labeled "Manager" above a blue box labeled "Options".</p>	<ol style="list-style-type: none"><li>1. Select <b>Manager</b> or <b>Options</b> and enter the administrative credentials</li></ol>
 <p>The screenshot shows a menu with several options. A red box highlights the "Tools" option. Other options include ASCII Transfer, Labor Scheduler, Inventory Transfer, Invoice Properties, 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, End of Day.</p>	<ol style="list-style-type: none"><li>1. Select <b>Tools</b></li><li>2. Select <b>ASCII Transfer</b></li><li>3. Enter the <b>administrative password</b></li></ol>
 <p>The screenshot shows a dialog box titled "Import Export". It contains two buttons: "Transfer In/Out" and "Classic". A red box highlights the "Tobacco Scan Data Export" button. A "Cancel" button is also visible at the bottom.</p>	<ol style="list-style-type: none"><li>5. Select <b>Tobacco Scan Data Export</b></li></ol>
 <p>The screenshot shows a dialog box titled "Question Box" with the question "Which Tobacco Scan Data Report to export?". It has two buttons: "PhilipMorris and/or USSTC" and "RJRReynolds". A red box highlights the "PhilipMorris and/or USSTC" button. A "Cancel" button is also visible at the bottom.</p>	<ol style="list-style-type: none"><li>6. Select <b>PhilipMorris and/or USSTC</b></li></ol>

PhilipMorris and/or USSTC Export

Account Number

WeekEnding

Folder

Select Department

mnmdept  
 NONE  
Tobacco  
Tobacco1  
tobacco2

The 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 the manufacturing company 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** and **USSTC**, 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.