Loyalty User Guide

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About RMH Loyalty

RMH Loyalty is a customer loyalty extension for **Retail Management Hero**. It is a comprehensive solution allowing users to create flexible customer loyalty scenarios involving various types of loyalty points and rewards. RMH Loyalty has its foundation in two customer loyalty systems for Microsoft Dynamics RMS: **Hero Points** and **Q-Rewards**.It can be used by either a new RMH customer or by upgrading existing Microsoft Dynamics RMS.

RMH Loyalty uses the rich customer functionality in POS. This means that it is unnecessary to implement any kind of a loyalty card or other type of the loyalty identification; all loyalty information is attached to a particular customer account in POS. To activate the loyalty functionality during the POS transaction, select a customer or create a new one. POS can look up a customer account by various criteria, including the account number, name, address, phone number, email address, etc. It also allows using customer aliases (unique numbers alternatively designating the customer account). Therefore, if a retail store prefers using customer loyalty cards, the card number could be associated with the customer account as an alias, after which the card could simply be scanned or swiped during the POS transaction in order to add the account to the transaction.

RMH Loyalty keeps all its data in the same database as Store Manager and is fully integrated with POS. Therefore, in order to use RMH Loyalty you must have an installed and fully licensed POS (except if you're installing Central Loyalty Manager).

Concepts

Loyalty programs

Loyalty Manager allows retailers to create one or more loyalty programs. There may be multiple loyalty programs active at the same time and applying to different item categories, customers, etc. A customer may be collecting and redeeming the loyalty value

on multiple programs simultaneously. For example, in a pet supply store the customer is participating in three separate loyalty programs: collecting quantity points for two separate buy 10 get 1 free loyalty programs, and a price points loyalty for accessories.

A loyalty program always consists of a mandatory collection schedule and redemption schedule, which define how to collect and redeem the loyalty value. It also has two optional rules, effective date and require confirmation.

Mandatory parameters:

- One or more **collection schedules**: A set of collection rules that determines how the loyalty values are collected.

- A **redemption schedule**: A set of rules determining how the collected loyalty value may be redeemed.

Optional parameters:

- **Effective date**: Determines a time period during which the loyalty program is in effect. If not provided, the loyalty program is always in effect.

- **Require confirmation**: A flag that prompts the cashier to request explicit consent from the customer for participating in the loyalty program. Appears only once when a customer is first eligible for a loyalty value collection.

Loyalty programs use a concept of the loyalty batch. Loyalty batch is associated with a customer. The customer always has one open batch per loyalty program the participate in. The batch opens every time a new loyalty program starts for a customer. When the customer receives a redemption, the current loyalty batch is closed and a new batch is opened with transfer of the remaining points balance.

Collection schedules

A **collection schedule** is a set of loyalty point collection rules. There may be more than one collection schedule defined, each associated with one or more loyalty programs. The same collection schedule may be used in multiple loyalty programs as long as their redemption schedules are different.

Refer to the following topics for more information:

- Collection types
- Collection rules

Redemption schedules

A **redemption schedule** is a set of point redemption rules. They determines how the customer's accumulated loyalty points can be redeemed. There may be more than one redemption schedule defined, each associated with one or more loyalty programs. The same redemption schedule may be used in multiple loyalty programs as long as their collection schedules are different.

Refer to the following topics for more information:

- Redemption types
- Redemption rules
- Redemption matrix

Point accelerators

A **point accelerator** is a promotional tool. Accelerators multiply the collected points based on the accelerator rules. For example, you might set up accelerators for club members, where club members receive 2x more points than non-club members. (In a club member scenario, the accelerator has be connected to a customer group.) You might also set up a promo for a specific date or range of dates, such as July 4th, where

shoppers receive 4x more points. Similarly, you might also set up a "happy hour" accelerator for a normally slow time of the day, such as Tuesday mornings, where shoppers receive 5x more points.

Refer to the following topics for more information:

- [Accelerator types](#)
- [Accelerator rules](#)

Incentive groups

An **incentive group** (also called an item group) is a mechanism to group items for the purpose of implementing unique collection and redemption settings for that group. Incentive groups can be either included in (or excluded from) collection schedules or redemption schedules.

Using incentive groups is optional. If a collection schedule or redemption schedule do not include an incentive group, it means that the collection schedule or redemption schedule applies to all items indiscriminately.

An incentive group may contain individual items or all items assigned to specific departments or categories. You can create multiple incentive groups.

Although it is possible to add individual items or all items assigned to specific departments or categories to more than one incentive group, adding items to multiple incentive groups should be used with caution. Make sure that there is no clash between the loyalty programs that inherit these incentive groups from the respective collection and redemption schedules.

Customer groups

A **customer group** is used to create various customer communities for the purpose of loyalty points collecting or redeeming. Like incentive groups, customer groups can be

either included in (or excluded from) collection schedules or redemption schedules.

For example, it is possible to create several customer groups and assign them Silver, Gold, and Platinum status. Each group would participate in collection schedules which define different point per dollar value using accelerators or otherwise.

Loyalty batch

A **loyalty batch** is a set of loyalty transactions that is completed when a reward is received.

If a customer participates in one or more loyalty programs, he or she always have one open batch per loyalty program and a history of the closed batches. Each closed batch signifies that the customer has received a redemption for that loyalty program.

The very first batch for a loyalty program is created when the customer has collected their first loyalty points in that program. The batch is closed when the redemption was received. By counting the number of the closed batches per customer, the manager knows how many rewards the customer has received and for which loyalty program type.

> **Note:** If not all points are used for the reward and the batch is to be closed because the redemption has been received, the remainder of the points is transferred to the newly opened loyalty batch of the same loyalty program.

Collection schedules

Collection types

There are three different types of collection schedules:

- Price points (PP)
- Basket points (BP)
- Quantity points (QP)

The collection type defines what triggers loyalty value accumulation.

Price points

In price points loyalty collection the trigger is the item's purchase price. Ultimately, the number of collected loyalty points depends on how much money the customer spends at the store. The points are awarded based on the item's price. For example, for each $1 get 1 loyalty point.

Basket points

Basket points loyalty collection forces the loyalty program to look at the transaction sub-total. With this type of loyalty collection, the merchant awards the customer with a certain number of points only when the transaction subtotal (basket size – hence the name) reaches a certain value; otherwise the customer receives no points. By gradually raising the basket value over time, the merchant will encourage a higher average ticket. For example, spend $30 – get 10 points; spend less – get no points.

> **Note:** Basket points is per-visit type of loyalty. Basket points collection type can also be used to award customers with points per visit. For example, create a collection schedule of the basket points type, and select $1 as the trigger to award 100 points. That means that each time the customer visits the stores and purchases anything worth more than $1, they will be awarded 100 points.

Quantity points

With quantity points the loyalty points are awarded per item count, over a period of time. For example, buy 1 medium bag of dog food – get 1 point.

Collection rules

In addition to the collection type, there are also collection rules. Certain rules apply only to certain collection types, while others apply to all types. Some rules are

mandatory, others are optional. In the following table the mandatory rules appear in **bold font**. Some rules may be repeated in the collection schedule (for example, include several customer groups), while others may appear only once (e.g. minimum purchase" for price points).

Complete list of the collection rules (click to expand)

Rule	Applic-able type	Man-datory	Occur-rence	Poss-ible value	Defau-lt	Descrip-tion
Include item incentive group(s)	All types	No	Multiple, no duplic-ates	One or more incentive group(s)		The item incentive group(s) that this collection schedule applies
Include customer group(s)	All types	No	Multiple, no duplic-ates	One or more cus-tomer group(s)		The cus-tomer groups that this collection schedule applies
Exclude item incentive group(s)	All types	No	Multiple, no duplic-ates	One or more incentive group(s)		The item incentive group(s) that this collection schedule does not apply
Exclude customer group(s)	All types	No	Multiple, no duplic-ates	One or more cus-tomer group(s)		The cus-tomer groups that this collection schedule

Rule	Applicable type	Mandatory	Occurrence	Possible value	Default	Description
						does not apply
Points per unit	**PP, QP**	**Yes**	**Single**	**Positive decimal**	**1**	The number of points collected per unit (dollar for PP or quantity for QP). Ex: - 1 Point for $1 (PP) - 100 points for 1 purchased "1L Milk" (QP)
Points per Basket Value	**BP**	**Yes**	**Multiple**	**Pair <money, decimal>**	**$10, 1**	Ex: - 1 points for $10 basket - 2 points for $20 basket, etc.
Rounding	PP, BP	No	Single	Pick list: No rounding, Nearest, Down, Up	Nearest	Determines how fractional points are rounded, e.g. 1.55 collected points will round up to 2.0 points

Rule	Applic-able type	Man-datory	Occur-rence	Poss-ible value	Defau-lt	Descrip-tion
						with the "Nearest" or "Up" rounding
Minimum purchase	PP	No	Single	Positive currency value	0	Determin-es that a neces-sary min-imum subtotal is required to collect points
New Cus-tomer Bonus Points	PP, BP	No	Single	Positive decimal	0	Adds bonus points to any cus-tomer which never had points col-lected, on the first purchase
Include accel-erator(s)	PP, BP	No	Multiple	One or more points accel-erator(s)		See Points Accel-erators further below
Exclude for Dis-counted	PP, BP	No	Single	Boolean	Enabl-ed	Excludes point col-lection for any item that is dis-counted

Rule	Applic-able type	Man-datory	Occur-rence	Poss-ible value	Defau-lt	Descrip-tion
Exclude for Non-inventory	PP, BP	No	Single	Boolean	Enabl-ed	Excludes point col-lection for non-inventory items
Exclude for Charges	PP, BP	No	Single	Boolean	Enabl-ed	Excludes points col-lection for charge items
Exclude for not priced	PP, BP	No	Single	Boolean	Enabl-ed	Excludes points col-lection for items that are not priced and the cashier manually provides the price
Exclude for vouch-ers	PP, BP	No	Single	Boolean	Enabl-ed	Excludes points col-lection voucher item type
Exclude for Redemp-tion	PP, BP	No	Single	Boolean	Enabl-ed	Excludes point col-lection for a trans-action which also con-tains points redemp-

Rule	Applic-able type	Man-datory	Occur-rence	Poss-ible value	Defau-lt	Descrip-tion
						tion
Exclude for lay-aways	PP, BP	No	Single	Boolean	Enabl-ed	Excludes point col-lection for layaway trans-action types
Exclude for back-orders	PP, BP	No	Single	Boolean	Enabl-ed	Excludes point col-lection for back-order trans-action types
Exclude for work orders	PP, BP	No	Single	Boolean	Enabl-ed	Excludes point col-lection for work orders trans-action types
Exclude cus-tomers with Dis-counts	All types	No	Single	Boolean	Enabl-ed	Excludes cus-tomers with pre-set dis-counts
Exclude cus-tomers with Price levels	All types	No	Single	Boolean	Enabl-ed	Excludes cus-tomers with pre-set price levels

Rule	Applicable type	Mandatory	Occurrence	Possible value	Default	Description
Exclude employees	All types	No	Single	Boolean	Enabled	Excludes customers that are marked as "employees"
Save collected points as item comment	PP	No	Single	Boolean	Enabled	Enables saving the collected points per each item in the line item comment field
Show collected points detail	All types	No	Single	Boolean	Enabled	Enables a popup at the end of the transaction to display the collected points detail

Note: Any optional Boolean rule (e.g., exclude employees) is always enabled when added. If the rule is not to be enabled, simply do not add it to the collection schedule.

Redemption schedules

Redemption types

A redemption type determines the method of loyalty value redemption. It is assigned when a redemption schedule is created and cannot be changed afterwards. The redemption types are:

- Dollar Discount ($D)
- Percent Discount (%D)
- Offset (O)
- Coupon ($C)
- Percent Coupon (%C)
- Offset Coupon (OC)
- Reward Item (RI)

A redemption type defines how the loyalty value (points) is applied.

Dollar Discount

The **Dollar Discount** ($D) reward type converts a certain number of loyalty points into a transaction discount that is applied on a customer's visit and purchase. For example, "$10 discount for 100 points", "$20 discount for 200 points" etc.

> **Note:** Normally the Dollar Discount redemption type is used in a loyalty program with the Price Points (PP) or Basket Points (BP) collection type.

> **Note:** The $D reward type attempts to discount each individual item in the transaction proportionally to its price.* If an item is marked as non-discountable, the discount reward cannot be applied to it*. Therefore, this type of reward always calculates a "discountable subtotal" of the transaction, which may be less than the actual subtotal. Keep this in mind in order to

avoid confusion when a transaction appears to have a sufficient subtotal for redemption, but the loyalty system does not prompt to apply the reward.

Percent Discount

The **Percent Discount** (%D) reward type converts a certain number of loyalty points into a percent discount which is applied to a future sale transaction. E.g. "10% discount for 100 points", "20% for 200 points" etc.

> **Note:** Usually the Percent Discount redemption type is used with Price Points (PP) or Basket Points (BP) collection types.

> **Note:** Just as the $D reward type, this redemption attempts to discount each individual item in the transaction. If an item is marked as non-discountable, the reward cannot be applied to it. Therefore, this type of reward always calculates a "discountable subtotal" of the transaction, which may be less than the actual subtotal. Keep this in mind in order to avoid confusion when a transaction appears to have a sufficient subtotal for redemption, but the loyalty system does not prompt to apply the reward.

Offset

The **Offset** reward type is used in the cases when the $D or %D type of reward cannot be used – e.g., when the items cannot be discounted. The offset method uses a negative price charge which is added to the transaction, therefore discounting the subtotal without changing the item prices. For example: "$10 off for 100 points", "$20 off for 200 points" – in each of these cases a negative charge with the price of -$10 (negative 10) or -$20 (negative 20) will be added to the transaction as a sort of rebate, therefore offsetting the subtotal without changing the item prices.

> **Note:** Usually the Offset redemption type is used with the Price Points (PP) or Basket Points (BP) collection types.

Coupon

The reward type **Coupon** (C) works almost exactly as the $D reward, except instead of immediately applying the available loyalty discount to a sale transaction, the loyalty system issues a personal discount coupon (prints on the POS printer) which could be used in a future transaction. For example: "$10 coupon for 100 points", "$20 coupon for 200 points".

Reward coupon can be configured with validity time frame (valid "from" and "until") - which is a great marketing tool to encourage the customers to visit more often and use the coupons before expiration date.

> **Note:** Usually the Coupon redemption type is used with Price Points (PP) or Basket Points (BP) collection types.

Percentage Coupon

This reward type **Percentage Coupon** (%C) works almost exactly as the %D reward, except instead of applying the discount to the reward transaction, the loyalty system issues a personal discount coupon (prints on the POS printer) which could be used in a future transaction. For example: "10% coupon for 100 points", "20% coupon for 200 points".

A reward coupon can be configured with a validity time frame (valid "from" and "until"), which is a great marketing tool to encourage the customers to visit more often and use the coupons before the expiration date.

> **Note:** Usually the Percentage Coupon redemption type is used with the Price Points (PP) or Basket Points (BP) collection types.

Offset Coupon

The reward type **Offset Coupon** (OC) works almost exactly as the Offset reward, except instead of applying an offset reward to the transaction, the loyalty system issues a personal discount coupon (prints on the POS printer) which could be used in a

future transaction. The difference between C and %C is the type of the coupon: this coupon will be applied not as a discount, but as an offset. For example: "10% coupon for 100 points", "20% coupon for 200 points".

A reward coupon can be configured with a validity time frame (valid "from" and "until"), which is a great marketing tool to encourage the customers to visit more often and use the coupons before the expiration date.

> **Note:** Usually the Offset Coupon redemption type is used with the Price Points (PP) or Basket Points (BP) collection types. Just as the Offset reward type it is best used in the retail stores where the items cannot be disounted for various reasons.

Reward Item

The reward type **Reward Item** (RI) awards an actual item at a discount or free - as a redemption of the loyalty points. It implements the type of a retail loyalty system which traditionally is handled by *stamp cards*. For example: "Buy 5 large drinks, get one at 50% off", or "Buy 10 bags of dog dry food, get one free" (this particular program is widely known in the pet supply industry as *"Frequent Buyer"*).

The reward type works best with the Quantity Points (QP) collection type which helps to implement the stamp card scenarios. Typically, in such scenarios there are multiple loyalty programs, each of which is dedicated to a particular incentive group that is includes in aspecific collection schedules. Those incentive groups contain items which are grouped by similar attributes - the same or similar price, size, brand, but have a different flavor. For example: "all small hot drinks", "all large cold drinks" for a coffee shop, or "Nutro Dog Large 40lb", "Pedigree Dog Small 10lb" for a pet supply store. For every such incentive group the loyalty system will keep a separate count through the QP collection schedule, and the reward item will come out of the same incentive group (see the redemption rule "Same group as Collection Schedule" below).

The **Reward Item** redemption can also be used with Price Points (PP) or Basket Points (BP) in the form of a *free gift* in exchange for a number of redemption points. E.g. "Free OPI Nail Polish for 100 points".

Redemption rules

In the same way as the Collection, a Redemption Schedule must be equipped not just with a type but with additional rules. Certain rules apply only to certain redemption types, while others apply to all types. Some rules are mandatory; others are optional. In the following table the mandatory rules appear in **bold font**. Some rules may be repeated in the redemption schedule (for example, include several Customer Groups), while others may appear only once (e.g. "Minimum Purchase" for PP).

Complete list of the redemption rules (click to expand)

Rule	Applic- able type	Man- datory	Occur- rence	Poss- ible values	Default	Descrip- tion
Reward value per point	$D, O, $C	**Yes**	Multiple, no duplic- ates	Pair of: # of points reward value	100/$10	Applies redemp- tion sched- ule: e.g. $10 off for 100 points, $20 off for 200 points etc.
Reward value per point	%D, %C	**Yes**	Multiple, no duplic- ates	Pair of # of points reward value (%)	100/1- 0%	E.g. 10% off for 100 points, 20% off for 200 points etc.
Reward value	RI	**Yes**	Multiple, no duplic-	Triplet of: # of	10/1/10- 0%	E.g., for 10 points,

Rule	Applic-able type	Man-datory	Occur-rence	Poss-ible values	Default	Descrip-tion
per point			ates	points# of reward items% dis-count		1 reward item at 100% dis-count
Reason code	$D, %D, $C, %C	**Yes**	Single	Any Dis-count Reaso-n Code		A Dis-count reason code type, which is auto-matically applied to every dis-counted item. The reason code must not be used for any other discount
Offset Charge/-NI Item code	O, OC	**Yes**	Single	Non-invent-ory Item or Charge lookup code		A neg-ative charge which will offset the trans-action sub-total by the reward value
Applies to the same incentive	All types	No	Single	Boolea-n	Enabled	If selec-ted, applies only to the

Rule	Applic-able type	Man-datory	Occur-rence	Poss-ible values	Default	Descrip-tion
group as Col-lection						same incentive groups as the col-lection schedule in the loy-alty pro-gram
Include incentive group(s)	All types	No	Multiple, no duplic-ates	Any incent-ive item group		Applies the reward only to the items from the selected item groups
Exclude incentive group(s)	All types	No	Multiple, no duplic-ates	Any incent-ive item group		Does not apply the reward to the items in the selected item groups
Include cus-tomer group(s)	All types	No	Multiple, no duplic-ates	Any cus-tomer group		Applies the reward only to the cus-tomers from the selected customer groups
Exclude	All types	No	Multiple,	Any		Does not

Rule	Applic-able type	Man-datory	Occur-rence	Poss-ible values	Default	Descrip-tion
cus-tomer group(s)			no duplic-ates	cus-tomer item group		apply the reward to the cus-tomers in the selec-ted item groups
Redeem on Back-orders	All types	No	Single	Boolea-n	Enabled	Specifies if the points can be redeemed on picking back orders
Redeem on Lay-aways	All types	No	Single	Boolea-n	Enabled	Specifies if the points can be redeemed on picking layaways
Redeem on Work Orders	All types	No	Single	Boolea-n	Enabled	Specifies if the points can be redeemed on picking work orders
Redeem on Refunds	All types	No	Single	Boolea-n	Enabled	Specifies if the points can be redeemed on trans-actions

Rule	Applicable type	Mandatory	Occurrence	Possible values	Default	Description
						that contain returns or exchanges
Maximum discount	All types	No	Single	Percent	0%	A maximum reward discount that could be applied to the transaction. Calculated as percentage of the subtotal. %0 means no limit
Redeem in the same transaction	All types	No	Single	Boolean	Enabled	The option allows the ability to redeem the loyalty value in the same transaction in which it is collected
Coupon Time Limits	$C, %C, OC	No	Single	Pair of two integers	1/30	Determines the coupon availability

Rule	Applic-able type	Man-datory	Occur-rence	Poss-ible values	Default	Descrip-tion
						time frame: days before activation / days valid after activation

Note: Any optional Boolean rule (e.g., "Redeem for Work Orders") is always enabled when added. If the rule is not to be enabled, simply do not add it to the collection schedule.

Redemption matrix

The following table illustrates the typical use of collection and redemption types in one loyalty system. The symbol "X" signifies a common scenario while "?" indicates that though such scenario is possible, it may be less frequently used.

For example, while collection points based on purchase price and redeem them as a discount (PP+ $D) is the typical scenario, awarding points for the quantity of specific purchased items and then rewarding them with a generic discount coupon (QP+$C) is less common.

Note that Percent reward types (%D and %C) are by nature prone to abuse (i.e., when a customer acquires points on smaller purchases but then applies the % reward to a large purchase), so they have to be used with caution.

In the same way, the coupons generally must be activated at some date in the future from the issuing date. Otherwise, the shoppers may be tempted to request immediate adjustment of the last transaction with their new coupon.

	Price Points (PP)	Basket Points (BP)	Quantity Points (QP)
Dollar Discount ($D)	X	X	?
Percent Discount (%D)	?	?	?
Offset (O)	X	X	?
Coupon ($C)	X	X	?
Percent coupon (%C)	?	?	?
Offset Coupon (OC)	X	X	?
Reward Item	?	?	X

where **X** means "definitely use", and **?** means "possibly use in certain scenarios".

Point accelerators

Accelerator types

There are four point accelerator types:

- Happy hour (HH) – Day of the week, from - until hours. E.g., every Monday from 3pm till 6pm

- Promo (PRO) – A date/time span. E.g. from January 1, 9am until January 15th, 9pm

- Sales (SL) – The total of historical sales for a customer. E.g., the customers who spent life-time over $1,000

- Club (CL) – A selected group of customers

Accelerator rules

All accelerator rules are mandatory.

Rule	Applic-able type	Man-datory	Occur-rence	Possible val-ues	Descrip-tion
Happy Hour	HH	Yes	Multiple, no duplicates	Combination of: ■ Day of the week ■ From time ■ Until time ■ Mul-tiplier (decima-l)	Applies a "happy hour" rule, e.g.: every Monday from 4:00PM to 6:00PM, x2 points
Promo	PRO	Yes	Multiple, no duplicates	Combination of: ■ From date/-time ■ Until date/-time ■ Mul-tiplier	E.g., May 1 to May 31, from 14:00 to 16:00 (note that it is not "from date/time to date/time", but "from date to date, dur-ing time from - time to period of every day")

Rule	Applic-able type	Man-datory	Occur-rence	Possible val-ues	Descrip-tion
				(decima-l)	
Sales	SL	Yes	Multiple, no duplicates	Pair of: ■ Total sales (money) ■ Mul-tiplier (decima-l)	E.g.: - $1000: x2 - $2000: x3
Club	CL	Yes	Multiple, no duplicates	Pair of: ■ Cus-tomer Group ■ Mul-tiplier (decima-l)	Split your customers into groups (e.g. Plat-inum, Gold, Silver) and give them different point mul-tipliers, i.e. Silver: 1x points, Gold: 2x points, Plat-inum: 3x points

Note: Accelerators must be unique for the accelerator type. I.e., you cannot have two HH accelerators "Monday from 3pm 'till 6pm". But the Collection Schedule can have multiple non-duplicate accelerators of the same type. E.g. PRO: "Jan 1-Jan 15", "March 15 – April 30" etc. Also, a Collection Schedule may have multiple accelerators of different types. I.e.: Happy

> Hour and Club. The higher value point multiplier will apply. I.e., if you have
>
> HH 2x multiplier and CL x3 multiplier, the customer will collect triple points.

Getting started

Opening Loyalty Manager

Use the Loyalty Manager shortcut to open Loyalty Manager.

There are several tabs organized vertically on the left-hand side of the window:

- Customer Management

- Incentive Groups

- Customer Groups

- Collection

- Redemption

- Accelerators

- Loyalty

- Configuration

- Maintenance

Use the arrow buttons at the top and bottom to scroll through the tabs.

There are two panels on each tab. The upper panel contains the entities that are defined on that tab, e.g., Customer Groups. The lower panel contains the entity details, e.g., Customers.

The ribbon contains two button groups: entity and detail. Use the entity and detail button groups to add, remove, and look up data.
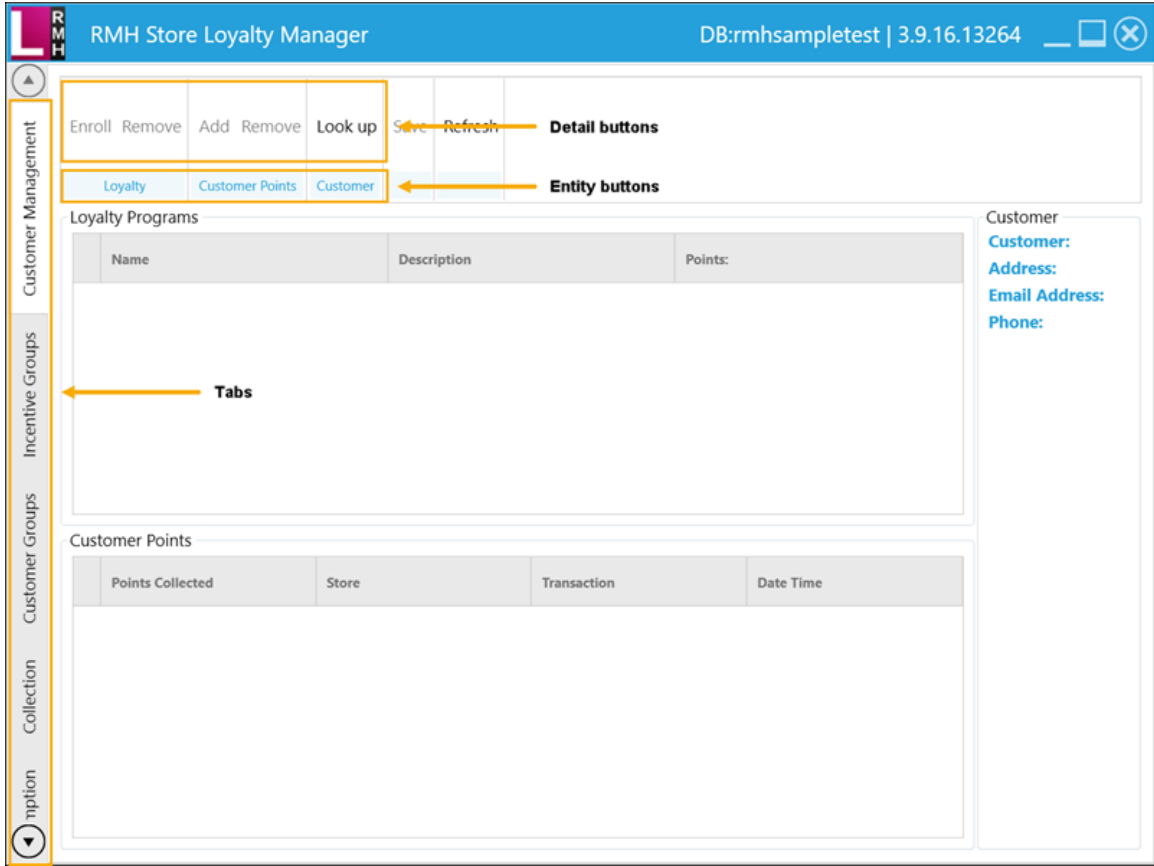
Note: To use Loyalty Manager you must configure at least one active loyalty program. Loyalty programs require at least one collection and one redemption schedule.

Creating a collection schedule

1. Click the **Collection** tab.

2. In the **Collection** button group, click **Add**.

3. Enter the **Name** and **Description**, and then select the collection **Type**:

   - Price Points

   - Basket Points

   - Quantity Points
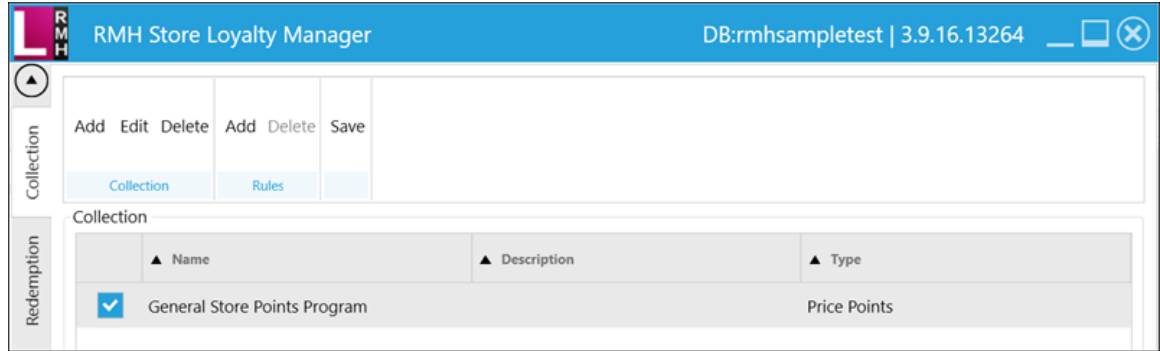
4.   Click **Save**.

5.   In the **Rules** button group, click **Add**.

6.   From the **Rule** drop-down, select the type of rule:

- **Points per unit** (mandatory for Price Points and Quantity Points)

- **Points per Basket Value** (mandatory for Basket Points)

- Include item incentive group(s)

- Include customer group(s)

- Exclude item incentive group(s)

For example, for a price points program, the mandatory rule is points per unit. If you keep the default value of 1, for every dollar they spend the customer will receive 1 price point.
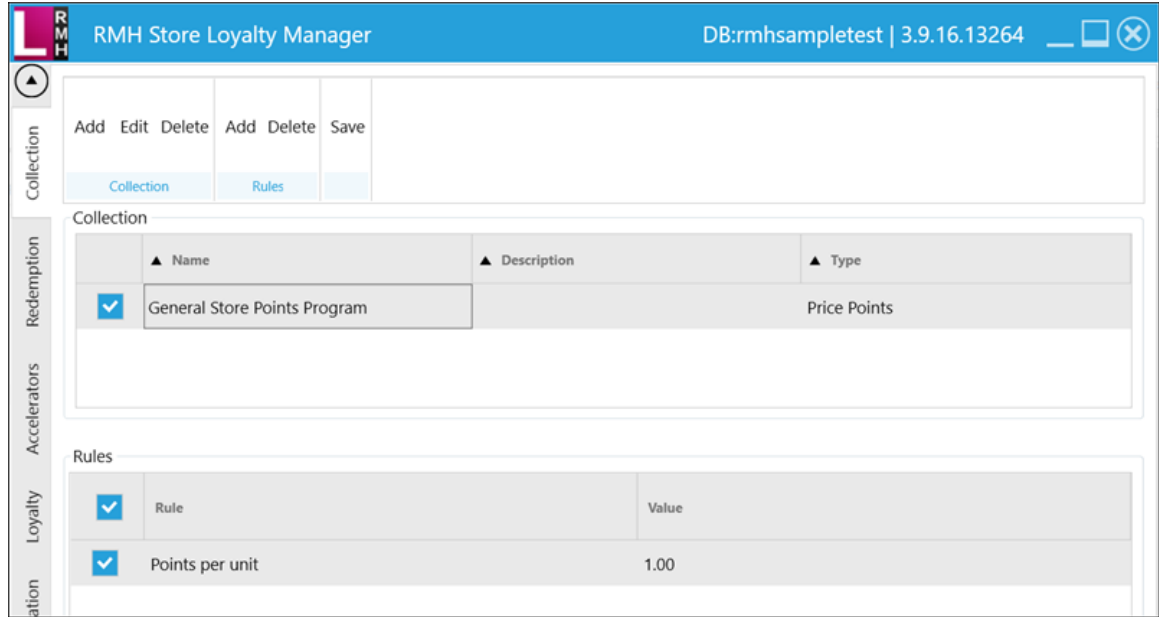
7. If desired, add other price points rules. Refer to Collection rules for more information.

    Note: If you want to limit the scope of point collection, you may want to include rules for incentive item group(s), and customer group(s). If you do so, only those items and customers defined in the included groups will generate or receive points. If you do not limit the scope of point collection, it means that all items and all customers will generate and receive loyalty points in every transaction.

8. Click **Save**.

9. Click **Save**.

 Creating a redemption schedule

1. Click the **Redemption** tab.

2. In the **Redemption** button group, click **Add**.

3. Enter the **Name** and **Description**, and then select the redemption **Type**:

- $ Discount

- % Discount

- Offset

- $ Coupon

- % Coupon

- Offset Coupon

- Reward Item
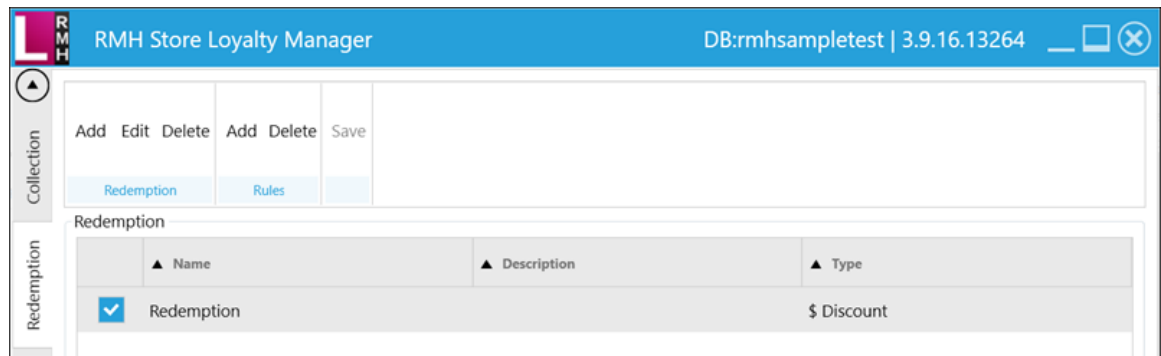
4. Click **Save**.

5. In the **Rules** button group, click **Add**.

6. From the **Rule** drop-down, select the type of rule:

- **Reason code** (mandatory for $ Discount, % Discount, Offset, $ Coupon, % Coupon)

- **Reward value per point** (mandatory for $ Discount, % Discount, Offset, $ Coupon, % Coupon, Offset Coupon)

- **Offset Item/ Charge Code** (mandatory for Offset, Offset Coupon)

- **Coupon Time Limits** (mandatory for $ Coupon, % Coupon, Offset Coupon)

- **Reward value per point** (mandatory for Reward Item)

- Applies to the same incentive group as Collection

- Include incentive group(s)

- Exclude incentive group(s)

- Include customer group(s)

- Exclude customer group(s)

- Redeem on Backorders

- Redeem on Layaways

- Redeem on Work Orders

- Redeem on Refunds

- Maximum discount

- Redeem in the same transaction

7. Enter the **Value**.

8.   Click **Save**.

9.   Click **Save**.

Creating a loyalty program

1.   Click the **Loyalty** tab.

2.   In the **Loyalty** button group, click **Add**.

3.   Enter the **Name** and **Description**.

4.   Click **Save**.

5.   In the **Loyalty Entry** button group, click **Add**.

6.   From the **Rule** drop-down, select **Collection Schedule**.

7.   From the **Value** drop-down, select the appropriate collection schedule.

8.   Click **Save**.

9.   In the **Loyalty Entry** button group, click **Add**.

10. From the **Rule** drop-down, select **Redemption Schedule**.

11. From the **Value** drop-down, select the appropriate redemption schedule.

12. Click **Save**.
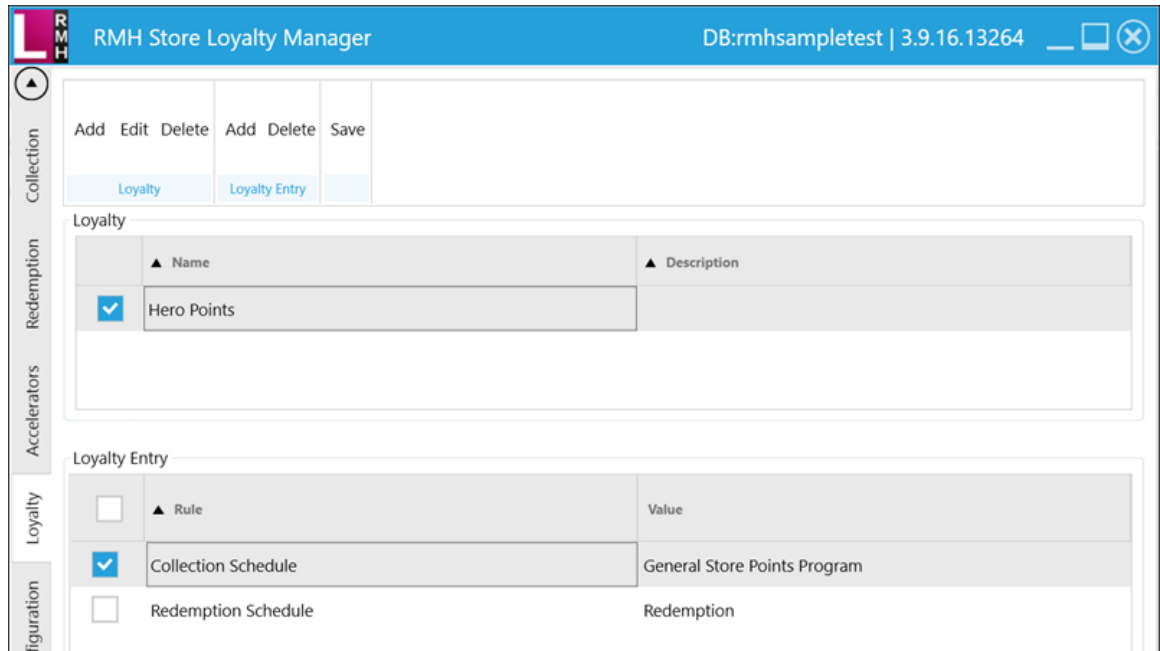
13. If desired, add optional rules:

   - **Effective Date:** When the loyalty program starts. If an Effective Date is not provided, the loyalty program starts immediately.

   - **Require Confirmation:** If selected, the cashier must confirm the customer's participation in the loyalty program when they are about to collect their first loyalty points.
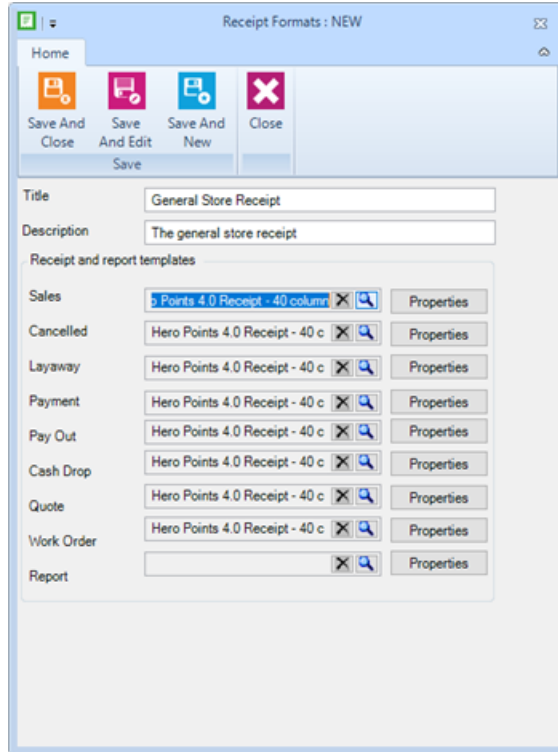
14. Click **Save**.

Configuring the POS receipt

If you want, you can add loyalty information or coupons to your store's receipts.

> **Note:** Some payment integrations and other POS extensions use their own receipt templates. Installing Loyalty Manager may disrupt the information these extensions may need to print on the receipt, such as credit card payment confirmation. Please contact your partner for a customized receipt template that can work with both Loyalty Manager and your POS extension.
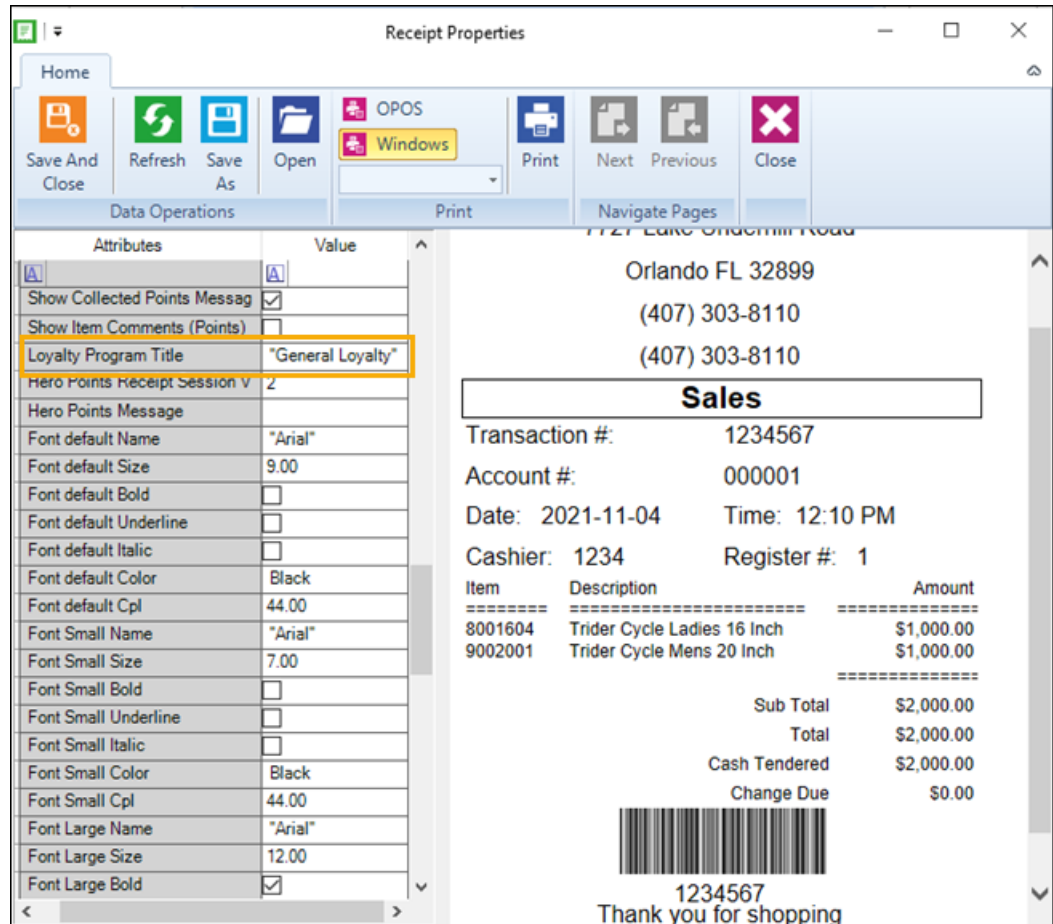
To configure the receipt template:

1. Open **Store Manager**.

2. Click **Setup**.

3. Expand **Hardware**.

4. Click **Receipt Formats**.

5. Click **New**.

6. Enter the **Title** and **Description**.

7. Beside the **Sales** field click the **Browse** icon.

8. Go to the **RMH POS** installation folder and open the **ReceiptTemplates** subfolder.

    > **Note:** In most installations the path is C:\Program Files (x86)\Retail Hero\RMH POS\ReceiptTemplates.

9. Select **HeroPoints40.Receipt.xml**.

10. If prompted "Would you like to update all transaction types that are currently set to 'Hero Points 4.0 Receipt - 40 column'?" click **Yes**. This receipt template will apply to all transaction types except for the X/Z Report.

11. Add the loyalty program name:

    a.   Click **Properties**.

    b.   Scroll down to **Loyalty Program Title**.

    c.   Select and delete the default loyalty program title ("Hero Points"). Enter your store's loyalty program name, e.g. "General Loyalty".

d. Click **Save And Close**.

e. If prompted "Would you like to update all transaction types that are currently set to 'Hero Points 4.0 Receipt - 40 column'?" click **Yes**.
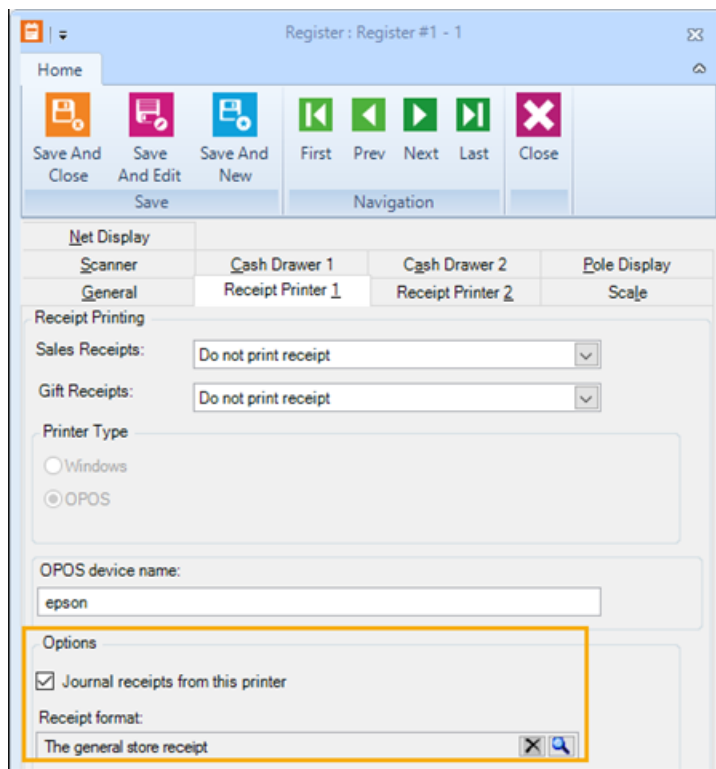
12. Click **Save And Close**.

13. The message "Each POS Station must be restarted in order for this change to take effect" displays. Click **OK**.

 Assign the new receipt template to the registers the will use it:

1. Open **Store Manager**.

2. Click **Setup**.

3.   Expand **Hardware**.

4.   Click **Register List**.

5.   Double-click the register that will use the receipt format.

6.   Click the **Printer 1** or **Printer 2** tab.

7.   Select **Journal receipts from this printer box**.

8.   Beside the **Receipt format** field click the **Browse** icon.

9.   Select the receipt format that you created.

10. Click **Save And Close**.
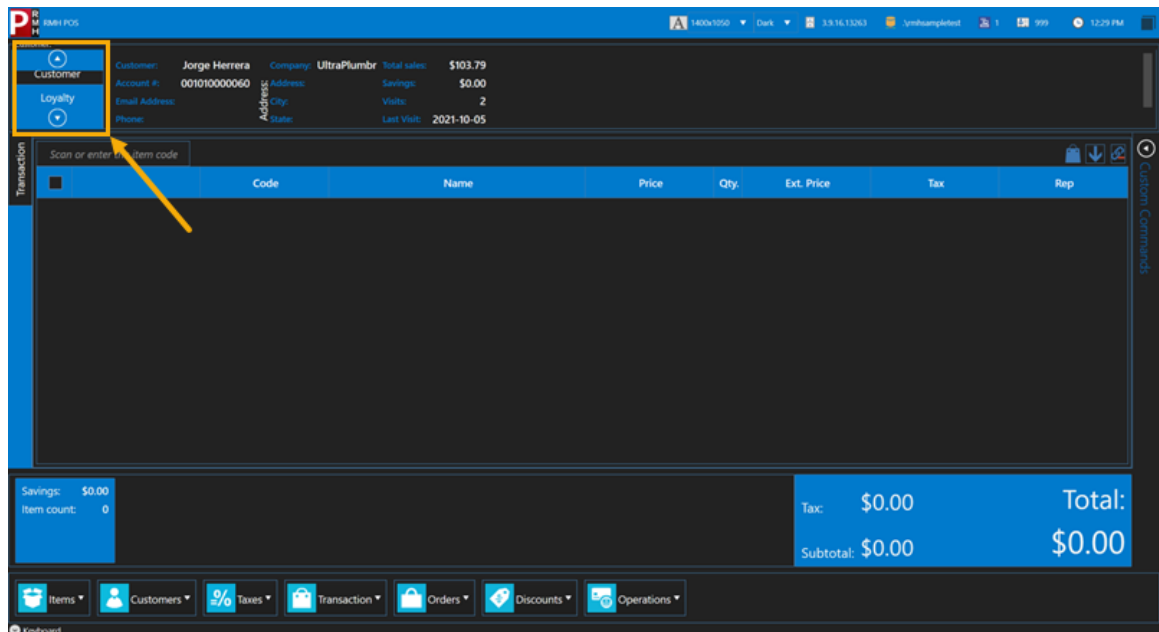
Using Loyalty Manager at the POS

To ring up transactions for customers who belong to a store loyalty program:

1. Open POS.

2. Select a customer.

   > **Note:** You must select a customer. In Loyalty Manager, loyalty programs
   > are connected to customer accounts.
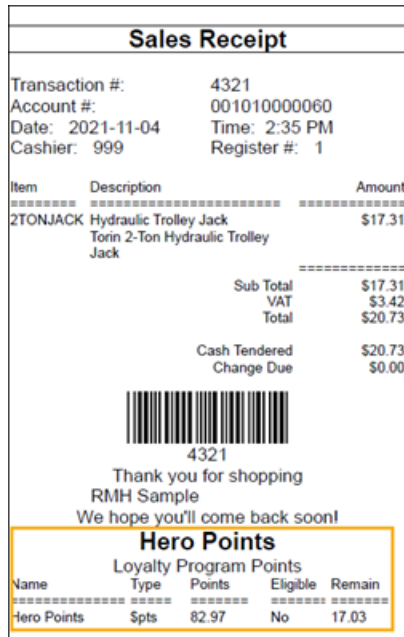
3. Click **Loyalty**.

   > **Note:** If necessary, click the up or down arrows until Loyalty displays.

4. Scan or enter items.

5. Click **Transaction** and select **Tender Sale**.

6. Enter the tender amount.

A message displays to inform the cashier of how many points the customer collected in this transaction.

7.   Review the receipt. If you have configured the Loyalty Manager receipt, you will notice an additional section at the bottom of the receipt.

**To look up if a customer is eligible to redeem a loyalty program reward:**

1.   Open POS.

2.   Select the customer.

3.   Click **Loyalty**. The customer's loyalty program status displays at the top of the screen:
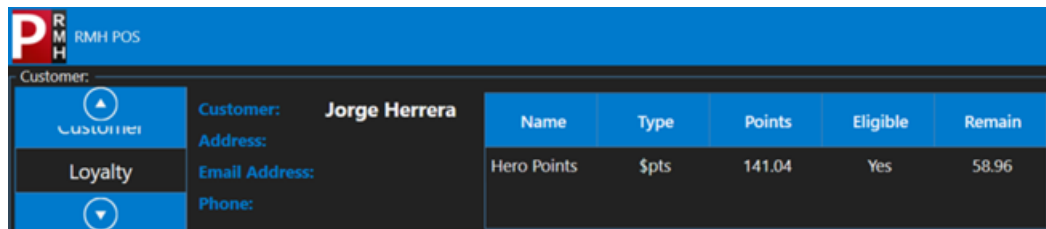
> **Note:** If the customer participates in more than one loyalty program, all programs and the current running total will be listed.

To redeem points or other rewards for customers who meets the redemption requirements:

1. Open POS.

2. Select a customer.

3. Click **Loyalty**.

4. Scan or enter items.

5. Click **Transaction** and select **Tender Sale**.

6. Select the reward to redeem.
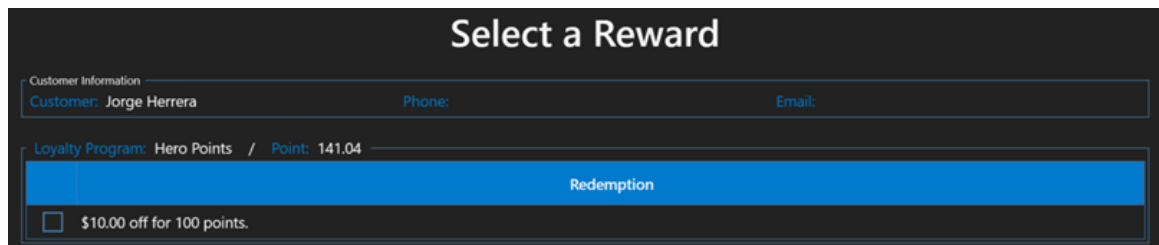
> **Note:** If the customer has got more than one loyalty program available for redemption, the selection will present all options, but only one redemption can be used at a time.

7. Click **Select**. The reward value is applied to the Total Due amount on the Tender screen.

8. Enter the remaining tender amount.

9. Review the receipt. The reward is identified in the transaction calculation and in a message below.

Best practices

Although Loyalty Manager is very flexible and allows a lot of interesting scenarios, there are some more typical scenarios to consider.

Loyalty ideas

Please consider the following common sense ideas about a retail loyalty program:

- The simpler the loyalty program is, the more effective it is. When the customers do not understand the rules and red tape, they do not feel the loyalty program benefits them.

- Do not restrict but reward. For example, instead of limiting certain groups of customers from collecting loyalty points, reward the most frequent customers with additional perks, such as Sales accelerators (e.g., all customers who historically spent more than $2,000, get double points).

- Create tiers of loyalty by using either Customer Groups, or the Club Accelerator. Add the most loyal customers to the top tier, but do not deny participating in the loyalty collection to the new customers

- Encourage new customers by adding "New Customer Bonus" points.

- Be generous and make your rewards sizeable. In general, the customer should get about 10% or higher discounts for participating in the loyalty program. A program which rewards the customer with 1-5% discount is not enticing.

- Use Coupon redemption type and set the time limits on the coupon as way to encourage the customers to visit more often. Remember that lowering your margin by implementing a loyalty discount, will be offset many times over by the item and customer turn generated by the loyalty program.

- Although Loyalty Manager does not require customer cards, it may be a good idea to have such. Design and order from your local supplier sequentially numbered loyalty cards and/or key tags (with barcode or mag-stripe) and distribute among your customers. On the first visit, add the card number to the customer's Aliases list. At subsequent visits, simply scan the card into the POS "Scan" entry field and the customer's account will be automatically found and attached to the transaction.

Typical loyalty scenarios

Hero Points

A sample scenario from the legacy Hero Points 3.X for Dynamics RMS. This scenario is designed to reward a customer with 10% loyalty discount.

- Collection:

    - Type: Price Points

    - Point per Unit: 1 point per $1 spent

    - Rounding: Up

- Show collected points detail: Yes

- New customer bonus points: 100

- Limitations:

    - Exclude employees

    - Exclude customers with discounts

    - Exclude customers with price levels

    - Exclude for vouchers

- Redemption:

    - Type: $ Discount

    - Reward value per point: 3 or more levels, e.g., $10 for 100 points, $20 for 200 points, $30 for 300 points, etc.

    - Reason code: a dedicated loyalty reason code

Such program may be made more granular by including or excluding certain incentives (item groups). Without those the collection schedule applies to any item in the inventory (except for those sorted out by the item type). When using incentive groups, you may limit which items do or don't collect the loyalty points.

Moreover, with incentive groups it is possible to create different collection schedules that will allow you to collect a different loyalty value on different product groups. For example, instead of putting slow-moving items on sale, you can award higher collected loyalty value on these items.

Using customer groups you also can create different collection schedules with different accumulated loyalty value. This way, you create various "loyalty tiers" for your customers.

Q-Rewards

The following is a sample scenario from the legacy Q-Rewards for Dynamics RMS. This scenario is designed to reward a customer with a free item at the end of the collection cycle. The program only makes sense with an incentive (item) group, which includes the items of similar attributes: type, price, manufacturer, etc.

There may be more than one such loyalty program. For example, a coffee shop may have only few such incentive groups, e.g.

- "Small hot regular beverages"
- "Large hot regular beverages"
- "Small hot premium beverages"
- "Large hot premium beverages"

But a pet supply store that runs a "frequent buyer" program may include hundreds of these incentive groups, congregating the products by type, size, price and manufacturer. E.g.:

- "Canidae Dog Small 4lb food bags"
- "Canidae Dog Large 20lb food bags"
- "Pedigree Premium Cat Small 4lb food bags"
- "Pedigree Dog Small 4lb food bags"
- Etc. …

A quantity points scenario:

- Collection:
    - Collection type: Quantity Points
    - Include incentive group: "Canidae Dog Large"

- Points per unit: 1 (one points per each purchased item)

- Show collected points detail: Yes

- Limitations:

    - Exclude Employees

- Redemption:

    - Reward per point: for 10 points - 1 item at 100% discount

    - Applies to the same incentive group as Collection: Yes

This loyalty program will collect 1 point for each purchased item from the "Canidae Dog Large" incentive group, and reward the customer with the free 11th item from the same incentive group (essentially, it will apply a 100% discount to the 11th item).

NOTE: Multiple collection schedules (one per each incentive group) can use the same redemption schedule, as long as "Reward per Point" stays the same and the rule to apply to the same incentive group as the collection, is turned on.

Basket Points

A following is a sample scenario from the legacy Hero Points 3.X for Dynamics RMS. This Basket Points scenario awards the customer with points only if a certain subtotal value (basket size) is reached, and rewards with a coupon discount.

- Collection:

    - Type: Basket Points

    - Points per basket value: 100 points for $30 basket

    - Limitations:

        - Exclude Employees: Yes

- Collection

- Type: $ coupon

- Reason Code: Dedicated loyalty discount reason code

- Reward value per point: $3

- Coupon time limits: Activate after 7 days, valid for 30 days after activation

This configuration will award 100 points every time the customer spends at least $30 (before tax) and as a redemption issues a $3 coupon which activates in 7 days after issuing and is valid for 30 days thereafter.

Glossary

A

accelerators
A mechanism for multiplying collected loyalty points.

alias
Aliases are like nicknames. You can define one or more aliases for an item. Aliases are a useful way to search for an item in POS or Store Manager. Each alias must be unique and cannot be the same at the item lookup code.

AR
The accounts receivable (AR) is money that is owed to a company by a customer who received products and services that were provided on credit.

assembly item
An assembly item is composed of items that are bundled or assembled into a package and sold under a separate lookup code, e.g., a gaming package with a controller, console, and game, or a cell phone contract that includes a specific cell phone. When a customer purchases an assembly item, the in-stock quantity of the individual assembly components is updated in the store database. More importantly, the cashier can change the quantity, price, or taxes of individual assembly components, e.g., the cashier can add or remove components and both the in-stock quantity of the components and the price of the assembly item are automatically adjusted.

B

back office

In a retail store, the back office usually refers to office space at the back of the store where managers and other team members perform tasks like counting cash, running reports, or reordering inventory out of sight of customers. This area may or may not be secured to prevent unauthorized entry. At Retail Management Hero, sometimes the Store Manager application is referred to as the Back Office Manager (BOM).

back order

An order for an item that is currently out-of-stock.

backup

A copy of a file, such as the store database, that is created in case the original file is damaged or deleted. Stores should backup their database every day.

bar code

A code that can be read by a scanning device. The bars that make up the barcode represent a series of numbers.

batch

Store Manager uses batches to export data to external accounting software applications. A unique batch number is assigned to each register when it is opened. This batch remains open until you run a Z report to close the register. You can then post the information in the closed batch to an external file that can be imported into your accounting software.

billing cycle

The period of time between billings for products or services, e.g., a month.

bin location

The location in the store where an item is stored.

blind closeout

A blind closeout is the process of closing a batch at a register without running a Z report. Typically, cashiers will perform a blind closeout at the register at the end of their shift and then take their cash drawer to the back office where they can balance their cash drawer and complete the closing process out of sight of customers.

block sale

You can block sales of items according to a schedule or starting or ending on a specific date.

buy X and get Y for Z
> A type of discount where a customer buys a specified quantity of items ("X") at full price and then gets a specified number of items ("Y") for free or at a discounted price, e.g., BOGO or "buy one get one" free discounts.

C

cash drawer
> A electronic cash drawer is a cash drawer that is connected to the register via a cable. Typically, electronic cash drawers open automatically at the end of a transaction.

child item
> A child item is an item that can either be sold singly or in a specific quantity within a parent item, e.g., 24 single bottles of water (child) in a case (parent). When the on-hand quantity of the single item is depleted, the parent item can be opened up to add the single items to the quantity on-hand.

collection schedule
> A set of rules which determines how the points are collected.

committed
> A value that represents the quantity of an item that has been back ordered or work ordered. This value does not represent what is currently in-stock.

conversion rate
> The ratio between two currencies, e.g., 1:2, which indicates how much of one currency is needed to exchange for the equivalent value of another currency. Store Manager uses the conversion rate to convert the local currency used by the store to a foreign currency.

custom commands
> You can define custom commands that display on the right side of the POS screen. You might use custom commands to provide access to third party integrations or any custom POS functions that you have built using the POS Software Development Kit (SDK). At Retail Management Hero, these custom commands are sometimes referred to as shortcut keys that allow cashiers to access a function quickly. You can use custom commands with custom keys and task pads.

customer group
> A group of customers to which collection or redemption apply. Consists of individual customer accounts.

D

database
> A structured set of data that is stored and accessed by a computer software application. In relational databases, data is organized into tables that can be linked (related) based on a value that is common to each, e.g., a lookup ID or customer ID.

denomination
> Denomination refers to the recognized face value of specific units of a currency, usually in the form of coins and bank notes. For example, in the U.S. the most recognized denominations for coins are pennies ($0.01), nickels ($0.05), dimes ($0.10), and quarters ($0.25). The most recognized denominations for bank notes are $1.00, $2.00, $5.00, $10.00, $20.00, $50.00, and $100.00.

device
> In Retail Management Hero, a device refers to any electronic device such as a keyboard, monitor, cash drawer, scale, scanner, printer, etc.

drop
> Excess cash that is removed from a cash drawer and put in the store's safe until the register is reconciled at the end of the cashier's shift.

E

EAN
> The European Article Number (EAN) is an international numbering and barcode standard used to identify a specific item that is sold in a specific packaging configuration by a specific manufacturer.

exchange rate
> The rate, e.g., 1.35, at which one country's currency can be exchanged for another currency. Store Manager uses the exchange rate to convert any amounts tendered in foreign currencies to the local currency.

F

field
> A field in a computer software application is a drop-down, checkbox, or text box where you can select pre-defined values (drop-down or checkbox) or enter text (text box). Field data is stored in a database record.

function button
> In the POS user interface, there are a number of function buttons at the bottom of the screen: Items, Customers, Taxes, Transaction, Orders, Discounts, and Operations. Use these button to access related functions.

G

gift card

There are two types of gift cards: (1) A voucher generated by the store in the form of a gift card, which may have a magnetic strip or barcode; and (2) A gift card from Visa, Amex, or another company that is processed through the payment system.

gift certificate

A type of voucher, usually printed on heavy card stock. The voucher number and prepaid dollar amount can be preprinted on the certificate or written on the certificate by the cashier. The gift certificate holder can use the certificate to purchase goods or services up to the total dollar amount specified on the certificate.

GL

The general ledger (GL) is a book that summarizes all of a company's financial transactions through offsetting debit and credit accounts.

GST

Goods and Services Tax (GST) is a value added tax. Countries that charge GST include Canada, the UK, France, Spain, Italy, Vietnam, Singapore, South Korea, and India.

I

incentive group

A group of items to which collection or redemption may apply. An incentive group may contain individual items, or entire departments and categories.

inventory

In a retail store, inventory refers to a list of items sold by the store and the quantity of each item that the store has on hand.

Inventory Wizard

In Store Manager, the Inventory Wizard is a tool you can use to make bulk changes to items in your store database, e.g., change the item price, cost, reorder information, or sales tax, or apply discounts.

item

In Retail Management Hero, items are specific goods or services sold by the store. Every item must have a unique item lookup code.

J

journal

The journal contains all transactions in the store's database.

K

kit item
> Kit items contain other items that are in the store database but are only sold as one item, e.g., a first aid kit. Kit items are sold as standard items. Kit items and assembly items are not the same. When a customer purchases a kit item, the in-stock quantity of the individual kit components do not change in the store database. In addition, the cashier cannot change the quantity, price, or taxes of individual kit components.

L

Label Designer
> In Store Manager, the Label Designer is a tool you can use to create templates for your own labels, e.g., add graphics and custom text.

Label Wizard
> In Store Manager, the Label Wizard is a tool that you can use to select a template, enter filter criteria to select items, and then print the required number of labels for those items.

landed cost
> Store Manager can automatically calculate the landed cost for each item received through purchase orders and inventory transfers. The landed cost of an item is the sum of the item's cost, tax, shipping, and other fees. You can specify the default cost distribution method that RMH Store Manager uses when items are received: Quantity, Value, or Manual.

lane
> In a retail store, a lane refers to a checkout lane where a customer takes the items they wish to purchase so the cashier can add the items to a transaction in POS and collect payment. A lane may be configured as an actual lane, or it may simply be a counter or desk.

layaway
> Layaway is a process where a customer pays for an item (or items) in increments. The customer only receives the item when it has been fully paid for. The customer typically pays a minimum deposit on the item to place it on layaway.

lookup code
> A unique set of alphanumeric characters used to identify an item, e.g., barcode numbers if an item has a barcode.

lot matrix item
> A lot matrix item is composed of items that are packaged in different quantities and have different prices based on the quantity purchases, e.g., a can of beer that

may be sold individually, or in 6-pack, 12-pack, or 24-pack quantities. Lot matrix items typically have the same lookup code but have different prices that correspond to the lot size (e.g., package quantity).

loyalty batch

A complete set of the loyalty transactions - between the first instance of collecting the points, and redemption (full or partial).

loyalty points

A mechanism of collecting loyalty value. Depending on the collection, type may be awarded based on the purchased items price, quantity, or on the transaction subtotal.

loyalty program

A combination of the collection schedule and redemption schedule with some optional parameters (such as effective dates).

M

matrix item

A matrix item is composed of items that are essentially the same, e.g., t-shirts or pants, but vary in one or two ways like size or color. These items, or components, typically have the same lookup code, description, and price as the matrix item. However, you have the option of setting up unique lookup codes, descriptions, and prices for each component. You can define up to three dimensions, e.g., size or color, to differentiate between components in the matrix. Within each dimension you can define several attributes, e.g., XS, S, M, L, XL, XXL, XXXL.

merchant account

A merchant account is a special business account set up to process debit and credit card transactions. It is not a normal bank account. Its sole purpose is to process debit and credit card transactions and deposit those funds into the store's checking account, minus any transaction fees.

mix and match

A type of discount where the customer can buy a specified quantity of items (the same item or similar items) for a discounted price, e.g., you have candy bars A, B, and C that you normally sell for $.85/ea. but you set up a mix and match discount where the customer can buy three of those candy bars, in any combination, for $1.99.

N

net display

A net display is a monitor, usually connected to a register, where you can display product photos, multimedia advertisements, or websites.

New Item Wizard
>	The New Item Wizard is a tool that you can use to add items and their components to the store database. The New Item Wizard is particularly useful for adding matrix, lot matrix, and assembly items to the store database.

no sale
>	In POS, a no sale is a type of transaction that allows the cashier to open the cash drawer without completing a sale. In Store Manager, you can control whether cashiers are allowed to enter a no sale. If they are allowed to enter a no sale, you can require a reason code and printed receipt.

O

offline database
>	You can set up POS to use an offline database if the network connection to the main database is disrupted.

offline inventory
>	Offline inventory are items that are not for sale, such as items that are damaged, have been returned, or that you plan to transfer out of the store. Note: Do not confuse offline inventory with items that are blocked for sale.

on hold
>	An on hold transaction is on that has not been completed. It has been saved for retrieval and completion at a later time. When an on hold transaction is retrieved, it appears in the state it was in when it was saved.

open up
>	When the on-hand quantity of a single (child) item is depleted, you can use Store Manager to open up the parent item and add the quantity of child items to the on-hand quantity for the single item, e.g, you open up a case of 24 bottles of water so you can sell the 24 bottles of water individually as single items. This is also known as breaking. It is a useful way to extract single items from carton or case inventories.

OPOS
>	OLE for Point of Sale (OPOS) is a standard that ensures that hardware and software is compatible. You can connect OPOS compatible hardware or peripherals, e.g., printers, pole displays, cash drawers, scales, and scanners, to registers running POS.

P

parent item
>	A parent item contains a set quantity of a single item, e.g., a case (parent item) of 24 bottles of water (single or child items). When the on-hand quantity of the single

item is depleted, the parent item can be opened up to add the single items to the quantity on-hand.

payment provider

A payment provider is responsible for collecting cash from authorized debit or credit card transactions and depositing it into the merchant account according to the settlement transactions submitted by the store.

peripheral

A peripheral is a device, e.g., printer, scale, scanner, that is plugged in to a computer.

PO

A purchase order (PO) is an order for specific items that is placed with a supplier.

R

reason code

A reason code is a pre-defined list of explanations for a specific action, e.g., price correction, cancelled sale, staff discount, etc.

redemption schedule

A set of rules which determines how the points are redeemed.

register

A register refers to the computer running POS in a lane. A number of devices may be connected to the register, such as a monitor, keyboard, mouse, electronic cash drawer, scanner, or scale.

reorder point

The reorder point is the mimimum number of items you can have on-hand before you should place a PO with the supplier to reorder the item.

restock level

The restock level is the quantity of an item that you want to have in stock. Store Manager uses the restock level to computer the quantity of the item to order when you generate a PO for the item.

return

A return is a transaction in which a customer returns an item they purchased. They may return the item for exchange with the same or a similar item, or for a full or partial refund on the purchase price.

reward transaction

A sales transaction in which the collected loyalty value is being redeemed.

role
> In Store Manager, you create roles for different employee functions in the store (e.g., manager, cashier, sales representative) and assign specific privileges or rights to the role. When you create a user account for a new employee you assign a role to the user account, and then customize their privileges or rights as required.

S

sales quote
> A sales quote contains a list of items that the store or sales representative is willing to sell for the price specified in the quote. A sales quote is typically only valid for a limited period of time, e.g., two weeks.

serial number
> A serial number is a unique identifier assigned to an item. It is typically a sequential or incremented number, e.g., 1, 2, 3, 4.

serialized item
> A serialized item has a unique serial number assigned to it. Store Manager can track the purchase of serialized items by serial number.

settlement
> Settlement is a process where the store sends authorized debit or credit card transactions to the acquiring bank to be processed. The acquiring bank then "purchases" the transactions and deposits cash in the store's bank account.

T

tag along item
> A tag along item is sold along with another item. When the other item is rung up at the register, the tag along item is automatically added to the sale.

tare weight
> The tare weight is the extra weight accompanying an item that is not included in the item's weight when the sale price of the weighted item is calculated, e.g., packaging.

tender type
> The tender type is a monetary classification, e.g., cash, debit, credit.

transaction
> A transaction is any action at the register (using POS) that involves the entry of items from the store database, e.g., sales, returns.

U

UPC
A universal product code (UPC) is a type of code printed on item packaging that identifies the item. The code has two parts: a scannable barcode and a 12-digit number located beneath the barcode.

URL
A universal resource locator (URL) is a website address, e.g., http://www.rmh-pos.com

user account
A user account is required to log in to Central Manager, Store Manager, Loyalty, or POS. Every employee should have their own unique user account.

V

VAT
Value added tax (VAT) is a type of tax that is levied on the price of a product or service. It is typically applied to items when they are rung up at the register (the point-of-sale). Stores that charge VAT must have a VAT account with the government so they can both submit VAT that they collected from customers and request credit for VAT they paid for products and services.

void
You may opt to void a transaction if, for example, the customer paid for the transaction using the wrong credit card or debit card. When a transaction is voided, it is as if it never happened. Inventory is not affected, and the sale method is cancelled (for example, their card will not be charged). You can only void a transaction if the batch is still open. You cannot void transactions in closed batches.

voucher
A voucher is an item that acts as a gift card or gift certificate.

W

weighted item
A weighted item is an item whose sale price at the register (the point-of-sale) is determined by its weight. The cashier must input the weight of the item manually or through an electronic scale. The item may have an associated tare weight.

work order
A work order is a type of transaction that is saved so it can be retrieved and completed at a later time. A deposit is typically collected from the customer for work orders.

X

X report

An X report is a report that displays current sales statistics for a register. Running an X report does not close the batch; it only displays sales information.

XML

Extensible markup language (XML) is a way of formatting data so it is easy to distribute across networks or between computer software applications.

Z

Z report

A Z report is similar to an X report because it displays current sales statistics for a register. However, running a Z report closes the batch. You should only run a Z report once a day. Most stores run a Z report at store closing.

ZZ report

A ZZ report is similar to a Z report. However, it is a report on all of the Z reports that were generated since the last ZZ report.