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Category	Technical
Course	POS Config.
Version	1.1
Client	Generic
Software	2.14.100

**Hints and Tips**

- ✓ SUREfire complete these steps as part of the set up.
- ✓ Refer to the [Mobile Marketing Memo](#) for a summary of how to operate this program.
- ✓ When customers sign up to the loyalty program, their MB number is associated with their prefixed card or AR account. This number will be used to notify the customer of special promotional activities.
  - Refer to the [POS-1d POS Mobile Saver Program Fact Sheet](#) to join customers to the program.
  - There can only be one phone number for a customer.
- ✓ **What card prefix to use?**
  - MS can only be linked at POS if a prefixed card is added to the transaction.
  - If you don't already issue prefixed loyalty cards, configure a 13-digit card that includes a two-digit prefix in the range 21 -> 29, whichever isn't being used for EAN's.
    - Perform a search on the **Stock** screen by EAN, to check which prefix is available (e.g. 27, 28, 29...); move to a [3] or [4] digit prefix if they're all in use.
    - Advise all users who register products that this prefix is now unavailable.
- ✓ If you have **multiple cards** with differing reward pricing, a customer that uses multiple cards (e.g. loyalty and senior) receives the best promotion and all eligible discounts.
  - The transaction is recorded against the **last learned** card scanned.

# Configure Mobile Saver (SMS) Program

The Mobile Saver marketing loyalty program is offered in conjunction with Third Screen. Third Screen sends text messages to customers who join the loyalty program, advising them of special discounts available in-store when they use their privilege card/account.

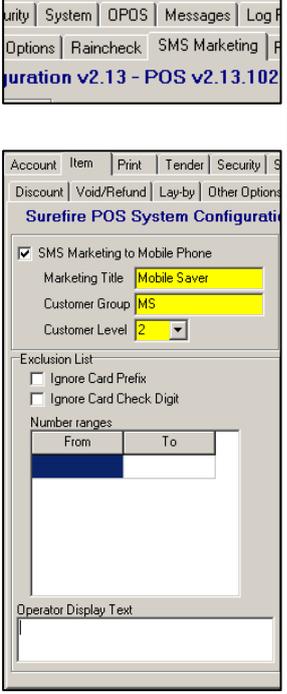
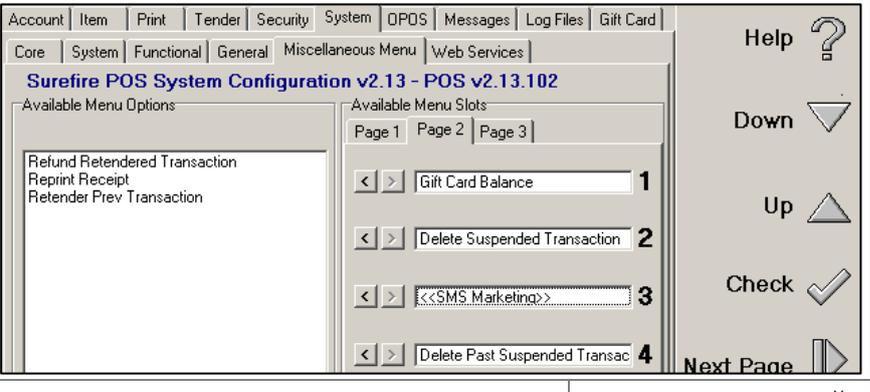
## Procedure to Configure a Mobile Saver (SMS) Program

1.	SUREfire Retail Support needs to set up a nightly .xml extract of sales transaction data to Third Screen. <i>* Third Screen learns a mobile number once the customer shops in the store.*</i>	
2.	Configure the <b>Customer Group</b> you want to associate to the program. <i>*E.g. Code: MS, Description: Mobile Saver.*</i> <i>*Refer to the <a href="#">Tech-4c Configure Customer Groups Fact Sheet</a>.*</i> <i>*You'll enter the customer group at step 8.*</i>	
3.	Configure the <b>Pricing Level</b> that you want to associate to the program. <i>*Refer to the <a href="#">Tech-4d Configure Special Customer Pricing Fact Sheet</a>.*</i> <i>*E.g. Code: [2], Description: Mobile Saver; you usually leave a gap in the numbering to future proof loyalty levels, as you can't edit the code. *</i> <i>*You must add MS to the <b>Customer Loyalty</b> tab; in some systems all 4 positions are populated with loyalty groups that have a % discount against them (e.g. bronze, gold). Confirm with the store that they are obsolete (they should be), and delete them to avoid inheriting any unwanted discount.*</i> <i>*You'll enter the pricing level at step 8.*</i>	
4.	Configure the card prefix to use. <i>*If you already run a loyalty scheme (e.g. VIP), you'll simply use the prefix already configured.*</i> <i>*See Hints and Tips.*</i> <i>*Refer to the <a href="#">TECH-2d Configure Customer Cards Fact Sheet</a>.*</i> <i>*Do NOT add the Mobile Saver <b>Customer Group</b> or <b>Price Level</b> against it; this is done at step 8.*</i> <i>*Select <b>Learn Customer</b> to auto-create an account when a new card number is issued at POS.*</i>	
5.	From the HOS/BOS <b>System</b> menu, select <b>Location Setup</b> .	

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**Hints and Tips**

- ✓ POS can automatically issue up to TWO customer group/price level rewards against a **learned** prefixed card; the one saved against the card prefix at step 4, and the one saved against **SMS Marketing** at step 8.
- ✓ The Mobile Saver **Customer Group** and **Price Level** are associated once the customer's mobile phone number is recorded against their AR account; this is how the saving is triggered at POS.
  - **Customer Group**; only customers who belong to the customer group get the discount.
  - **Price Level**: only customers who belong to the price level get the promotion or discount (note: if they belong to two levels, such as VIP and MS, only one level shows on their AR account).
- ✓ The **Exclusion List** section is usually only used if you have old cards that you want to replace with a new range of cards; the configured **Display Text** will display at POS when the operator tries to register the customer's mobile phone number. The operator will need to issue a new card if the customer still wishes to join the program.
  - Only select **Ignore Card Prefix** check box if the barcode range you type in the grid contains a prefix.
  - Only select the **Ignore Card Check Digit** check box if the barcode range you type in the grid contains a check digit.

<p>6. If a Head Office user, select the Location that you want to define. <i>*You'll be defining the receipt text for all stores at and below the level that you select.*</i></p>	
<p>7. Double-click the <b>Configure</b> icon. <i>*If a Head Office user, click <b>Yes</b> to continue.*</i></p>	
<p>8. Complete the following steps to enable the mobile marketing button to record the customers mobile number at POS:</p> <ol style="list-style-type: none"> <li>a. Click the <b>Item -&gt; SMS Marketing</b> tab.</li> <li>b. Select the <b>SMS Marketing to Mobile Phone</b> check box.</li> <li>c. In the <b>Marketing Title</b> field, type the name you want to call the program.</li> <li>d. <i>*This name will display on the button at POS that's used to record a customer's mobile number.*</i></li> <li>e. In the <b>Customer Group</b> field, type the code of the customer group you created at step 2.</li> <li>f. Select the applicable <b>Customer Level</b> you created at step 3.</li> <li>g. If you will exclude a range of card numbers from receiving the benefit, type the number ranges that will be excluded; select the <b>Ignore Card Prefix</b> and/or <b>Ignore Card Check Digit</b> check boxes if applicable, and enter the message text to display at POS.</li> </ol>	
<p>9. Complete the following steps to configure the position of the Mobile Saver function on the POS operator screen.</p> <ol style="list-style-type: none"> <li>a. Click the <b>System -&gt; Miscellaneous</b> tab.</li> <li>b. Click the <b>Page 3</b> tab.</li> <li>c. <i>This is where the &lt;&lt;SMS Marketing&gt;&gt; function is inserted by default.</i></li> <li>d. If you want to move the function, click [<b>&lt;</b>] to move it out of the slot, then highlight <b>SMS Marketing</b> and click [<b>&gt;</b>] against the slot to move it into.</li> </ol>	

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**Hints and Tips**

- ✓ Selecting the **Enable XML Output** check box will create daily.xml files alongside the standard daily.dat files.
  - The .xml files are located in the Uploads directory.
  - Thedailydatapacketsimport, exe program will extract the Third Screen transactional and customer data, and create a dailysms\*.xml file in the Exports directory based off that data. That file is then sent to Third Screen overnight.
  
- ✓ The configuration is applied to the registers when **File Transfer** next runs and the operator logs off/on; if made at Head Office, this occurs after **HOS Export/Import** next runs.

<p>10. Complete the following steps to enable transactional and customer data to be exported to Third Screen :</p> <p>a. Click the <b>Log Files -&gt; Log Files Settings</b> tab.</p> <p>b. Select the <b>Enable XML Output</b> check box.</p> <p><i>*See Hints and Tips.*</i></p>	
<p>11. Click .</p>	
<p>12. Click <b>Yes</b> to continue.</p> <p><i>*Or click <b>Cancel</b> to return to the settings.*</i></p>	
<p>13. Click <b>OK</b>.</p>	
<p>14. Click  to exit the Location Setup.</p>	