

Memo

To: The Store Team
From: Rebecca Burton (SUREfire Training Services Leader)
Re: Mobile Saver Marketing Program

Your store has decided to implement the Mobile Saver marketing program, offered in conjunction with Third Screen. Third Screen sends text messages to customer who join the program, advising them of special promotions available in-store when they use their privilege card.

Please refer to the following information that summarises how you operate this program in-store.

Note: If you run **multiple cards** with *differing* reward pricing in your business, a customer that uses multiple cards (e.g. a loyalty/mobile saver card and a seniors card) receives the best promotion and all eligible discounts. The transaction is recorded against the last **learned** card scanned.

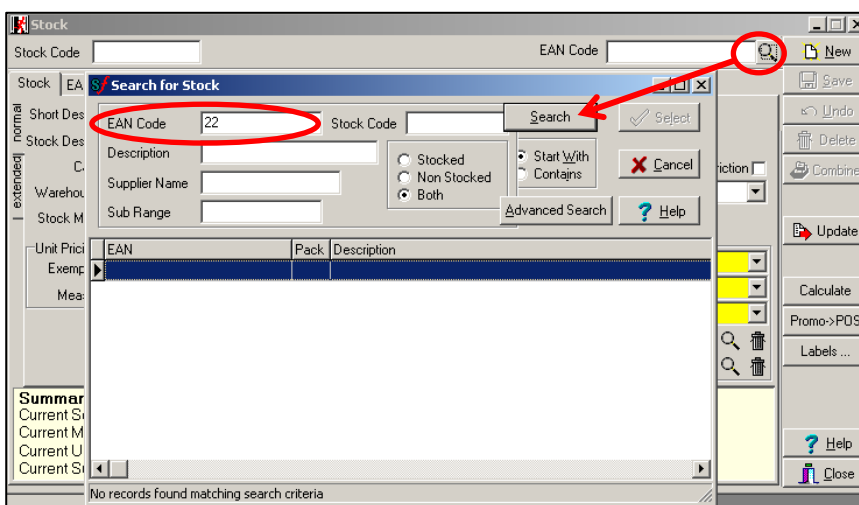
1. Print prefixed customer cards and membership forms.

The only way to join a Mobile Saver customer at POS is to issue configured prefixed cards that are saved as an AR customer account (cash only) in the BOS.

- Provide sign-up forms if you want to personalise the AR accounts (otherwise they'll all display as 'new customer' at POS).
- **Advise SUREfire support of the prefix that will be used, so they can configure the system. POS only displays the SMS function if a configured card prefix is added to the transaction.**
- If you already run a loyalty scheme, you can use the same prefixed card; the mobile saver privilege is configured on top of (extra to) any existing privilege against the card.

Otherwise, decide on a new 13-digit card number that includes a two-digit prefix in the range 21 -> 29, whichever isn't being used for EAN's in your system (the card number is based on EAN 13-digit so that it scans at POS; e.g. 2300000000001, 2300000000002).

- Perform a search on the **Stock** screen by EAN, to check which prefix is available (e.g. 21, 22, 23...); 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.

2. Join customers to the mobile saver program.

Once SUREfire have advised that your system has been configured, you can start to join customers! You can use the same dummy MB number for any customers who don't have a mobile phone but want to join the program; e.g. 9999 999 999.

- **Method one:** (*preferred*)
 - Perform a \$0.00 sales transaction (don't add any products or other cards/accounts, to avoid the MS details being recorded against the wrong account):
 - i. the operator scans a new card; POS automatically learns and creates this number as a cash customer account in the Back Office.
 - ii. the operator selects the **MISC** menu -> **SMS** marketing function to record the customer's mobile number. This activates SMS's (overnight) and joins them to the privilege group.
 - The customer receives any active discounts from their first sale.
 - Refer to the [POS-1d Mobile Saver Program Fact Sheet](#) for the full operator instructions.
- **Method two:**
 - The customer takes away a membership form, & sends a text message to activate SMS's.
 - The customer only receives discounts once their membership form is entered into the BOS.

3. Update the customer's account with the details on their membership form.

- If you joined customers via POS ([method 1](#)), all you have to do is retrieve the customer's account in the BOS, to add their name and check that their mobile number was recorded correctly.
- If a customer has only completed a membership form ([method 2](#)), create an AR account from scratch; add them to the price level 'mobile saver' (on the **General** tab), and the customer group 'mobile saver' (on the **Loyalty** tab; click **Add** to find the group).
- If their MB number is incorrect (or changes), update it at POS or in their account; Third Screen will learn it when the customer next shops (once the transaction data is transferred).
- Refer to the [BGEN-2b New Loyalty Customer Account Fact Sheet](#).

4. Create the offers in the Discount Wizard function.

- You'll be hosted or advised of three offers to create, and you can design one of your own discounts. Add the **Customer Group 'mobile saver'** as the criterion for these discounts.
- We recommend that you check the new discounts work at POS each week.
- Use the Third Screen Bookings website to record the text that's sent as SMS's to customers.
- Refer to the [PRO-3a through to PRO-3o Discount Wizard Fact Sheets](#).
- Run the **Reports -> Sales -> Discounts** report to review the number of mobile saver products that have sold (e.g. the Item Count when a 2 for \$5 discount occurs will increase by [2] units.)
- *Note: you can create promotions (on the Stock record -> Promotions tab) which only Mobile Saver customers receive, by using the 'Loyalty Pricing: Mobile Saver' option. However, the system doesn't link the price level to the sale, so these sales won't report on the Promotion Sales report.*

A customer can opt out of receiving the text offers.

- Third Screen will email your store if a customer sends an opt-out text message. If you don't want them to receive the discounts anymore, remove the MS price level and customer group from their account.
- Refer to the [BGEN-2d Maintain a Customer Account Fact Sheet](#).

Please contact our Retail Support Team if you have any questions about this program.

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