

Value-Added Products

Value-Added Products Team

TracPoint Mailer Setup

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Mailer Setup

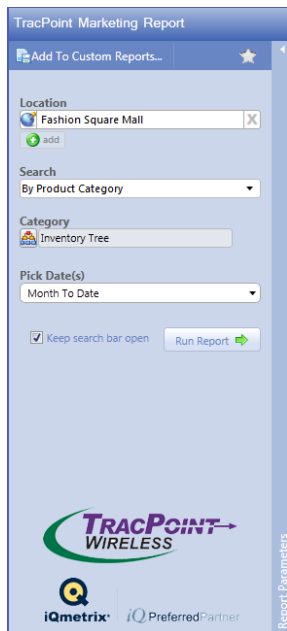
Setting up a mailer program in RQ4 is very simple, but can vary depending on what parameters you want to set within your stores. You can make the program as simple or as complex as you want.

If a 3rd party list is used, please go to the Mailer Setup in RQ4 section.

TracPoint Marketing Report

The TracPoint Marketing Report will enable the iQmetrix user to generate a list of clients to send to TracPoint for marketing. Once an iQmetrix user has a marketing idea in mind, they would run the report to get a customer list and provide that to TracPoint. TracPoint would generate the marketing campaign and mail out to the clients on the list with the offer they are eligible for.

This report is found in the Reports Console | Customers | scroll to the bottom in the list...or just search TRACPOINT in the search field at the top of the Reports Console.



Location:

The report will default to the location you are logged into, but any level of the company tree can be selected (Company | Region | District | Location)

Use the add button to add multiple locations, districts, or regions.

note: Region and District search options are as of RQ4 v4.1.1

Search:

Select By Product Category, By Product, By Manufacturer or By Vendor. Note that this will change the third search option.

Pick Date(s):

Select any of the show options in the drop down list.

After you have used the Tracpoint Marketing Report to pull the customers you want to send mailers to, you can export this list into Excel and send it directly to Tracpoint. At this point, you can work with Tracpoint to design and set the parameters for the mailers.

Mailer Setup in RQ4

After following the instructions below, it is important to note that you send the coupon SKUs to Tracpoint directly so they can create barcodes that match the SKUs. This helps at the point of sale (explained in the next section), because your salesperson can scan in the SKU and the coupon discount will automatically be found.

Please note that all screen shots in this document are from RQ4 v4.1.3, so screenshots may differ depending on what version you're on.

The most common and effective practice for setting up these mailers is to treat the cards like coupons. Setting up coupons is very simple, and is outlined below:

To set up your coupons please follow these steps:

Go to **Settings Console | Company Settings | Point of Sale | Coupon Setup**

The Detail Tab

The screenshot shows the 'Coupon Setup' application window. The 'Details' tab is active, displaying the following information:

- Coupons List (Left Sidebar):** Loyalty Program, Test, phone discount, 25\$ off qualified upgrades (highlighted).
- Product SKU:** COUPON000004
- Description:** 25\$ off Upgrade
- Short Description:** 25\$ off qualified upgrades
- Select the G/L promotions account this coupon belongs to:** Gift Card Liability
- Discount Method:** Fixed By Invoice
- Deduct:** 25 \$
- Availability:** Continual
- Locations:** Fashion Square Mall, TracPoint Wireless
- Taxes:** + Add Taxes

1. Once there, click on the New button
In the Details Tab, the Product SKU is created automatically upon saving
2. Once the coupon has been saved, press the Labels button to print a label in order to scan the SKU into RQ4
3. To disable a coupon, check off the Disable checkbox
4. Enter in a description in the Description field
5. Enter in a short description in the Short Description field; when you tab out of the description field, the short description will auto fill with the first 30 characters of the description. This can be edited
6. Select a G/L promotions account by clicking on the Category button to open the Choose G/L Account window and double clicking your selection
7. Choose your Discount Method. You can choose from the following:
 - Fixed by Invoice - If you choose this method, you will need to enter the amount to deduct off the invoice in the Deduct: \$ text box.
 - Percentage Of Invoice - If you choose this method, you will need to enter the percentage amount to deduct off the invoice in the Deduct: % text box.
8. Choose the Availability of this coupon.

- a. Continual - These coupons will be effective once saved. This is ideal for open-ended coupons.
 - b. Date Range - This will allow the user to enter a start and end date for the coupon to automatically take effect and then disable automatically; by choosing this method, you must select your Date Range from the From and To drop down menus provided
9. Choose the Location the coupon is valid in by clicking on the Globe icon and double clicking your selection(s). The coupon will be attached to locations, allowing the greatest flexibility for all users
 10. Choose any taxes that need to be added to this coupon

The Criteria Tab

The screenshot shows the 'Coupon Setup' application window. The 'Criteria' tab is active, displaying the following configuration options:

- The invoice must have a minimum value to allow the coupon** \$0.00
- If this coupon is used, no other coupon type can be used on the same invoice**
- Allow this coupon to appear on a single invoice multiple times**
- This coupon can only be used if at least one of the following products is on the invoice:**

Products

By Category

Product SKU	Product	Included
Phones		
CAVZAF000022	Samsung U410	<input checked="" type="checkbox"/>
CAVZAF000046	LG-VX8500 White	<input checked="" type="checkbox"/>
CAVZAF000055	Motorola MOTORAZR V9m	<input checked="" type="checkbox"/>
CAVZAF000059	Novatel V640	<input checked="" type="checkbox"/>
CAVZAF000066	LG Voyager	<input checked="" type="checkbox"/>

The invoice must have a minimum value to allow the coupon. If this criteria is selected, please enter the amount in the text box provided

If this coupon is used, no other coupon type can be used on the same invoice

Allow this coupon to appear on a single invoice multiple times

To allow this coupon to only be used if certain products are on the invoice, you will need to specify which

products. To do this, choose whether to search By Product or By Category from the drop down menu. If you are searching By Product, please click on the Magnifying Glass icon to bring up the Inventory Tree. Navigate through the tree and double click your selection(s), or select multiple products by using the Ctrl/SHIFT keys on your keyboard and press OK. You can also select all products in a category by pressing the Select All button.

If you are searching By Category, please click on the Magnifying Glass icon to bring up the Inventory Tree. Navigate through the tree and double click your selection. Once the category has been selected and is in the graph, you can click the Expand (+) or Contract (-) buttons next to the Category name to get a complete listing of the items in that category.

The Commissions Tab

The screenshot shows the 'Coupon Setup' application window. On the left, a list of coupons includes 'Loyalty Program', 'Test', 'phone discount', and '25\$ off qualified upgrades' (which is selected). On the right, the 'Commissions' tab is active, displaying a table titled 'Commission Details'.

Employee Group	Commission Type	Rate %	SPIF \$
Administrator	Non-Commissionable	0.00%	\$0.00
Store Clerk	Non-Commissionable	0.00%	\$0.00
Store Manager	Non-Commissionable	0.00%	\$0.00
Sub Agent	Non-Commissionable	0.00%	\$0.00

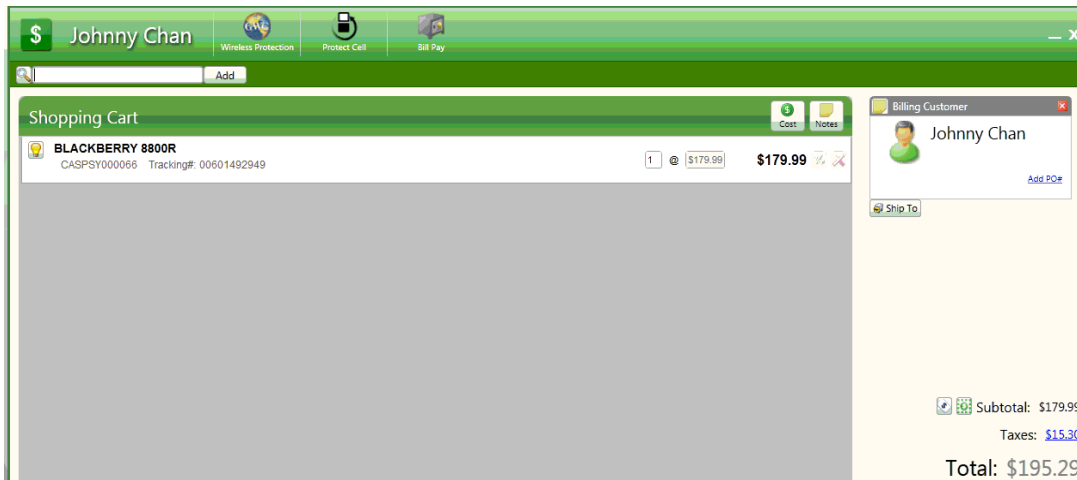
Use the grid to specify the commission structure for this product. Commissions can be set based on the coupon and the commission group; meaning that one coupon can be commissioned differently for

different Employee/Commission groups

The commissions from coupons will be tied to the invoice, but not to a product

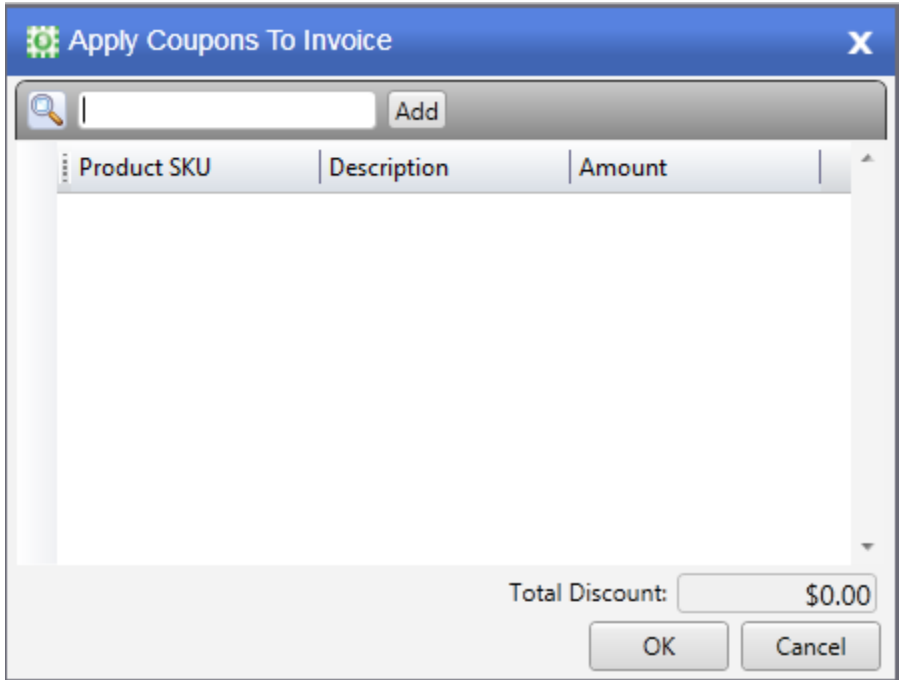
Applying the Coupon at the Point of Sale


Now that you have created the coupons, it is important to understand how they work at the point of sale.



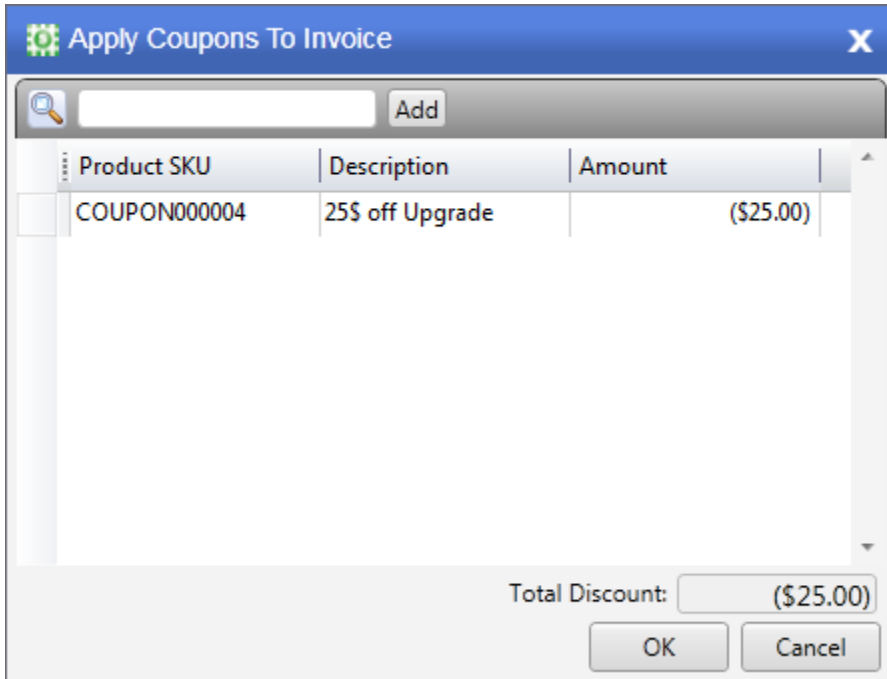
Create the sale as you normally would.

Coupons are applied to an invoice, as opposed to a specific product. This allows the ability to keep products Non-Discountable while still being able to reduce the amount of the invoice.



If you wish to apply a coupon to the sale, click on the **Coupons**  button, which is located next to “subtotal” at the right of the screen. This will open the **Apply Coupons to Invoice** window.

Scan in the coupon SKU and press the Add button.



Once you have selected the coupon(s) you would like to apply, press OK to add it to the invoice. You can also press Cancel to cancel this transaction.

You will see the coupon amount has now been applied to this invoice.

Proceed to the checkout and finish the sale as you normally would



Fashion Square Mall
 7014-590 East Camelback Road
 Scottsdale CA 85251
 (555)564-1688

Invoice



Invoice : FAINGIN554

Tendered On: 18-Jan-2011 04:29 PM
 Sales Person: Alyssa Turik
 Tendered By: Joel McGillivray
 Tendered At: Fashion Square Mall

Bill To: Johnny Chan

Product SKU	Description	Tracking #	Qty	Your Price	Your Total
CASPSY000066	BLACKBERRY 8800R	00601491985	1	\$179.99	\$179.99
Payment:				Subtotal:	\$179.99
Cash	\$170.29			25\$ off qualified upgrades:	(\$25.00)
				Arizona State Tax:	\$15.30
Change:	\$0.00			Total:	\$170.29

Comments:

Thank you for shopping at Successful Cellular. Please visit us online at successfulcellular.com

The coupon reductions can be seen on the invoice

Reporting

The Coupon Summary Report is an all in one Report for information regarding coupons.

The Report is laid out with six tabs for very detailed Reporting. There are daily, location, coupon and employee summary tabs plus coupon and employee commission detail tabs. One especially useful piece of data is found on the employee summary in the Take Rate column which allows you to determine which employees are applying the most coupons. Below is a screen shot of the report. Please consult the help files for more information on each individual tab.

Coupon Summary Report Fashion Square Mall : 1/1/2011 to 1/21/2011

Add To Custom Reports... ★

Location: Fashion Square Mall

Pick Date(s): Month To Date

Keep search bar open Run Report

21 Records Returned

Date	Qty Applied	Qty Refunded	Net Qty	Total Value
01/01/2011	0	0	0	\$0.00
01/02/2011	0	0	0	\$0.00
01/03/2011	0	0	0	\$0.00
01/04/2011	0	0	0	\$0.00
01/05/2011	0	0	0	\$0.00
01/06/2011	0	0	0	\$0.00
01/07/2011	0	0	0	\$0.00
01/08/2011	0	0	0	\$0.00
01/09/2011	0	0	0	\$0.00
01/10/2011	0	0	0	\$0.00
01/11/2011	0	0	0	\$0.00
01/12/2011	0	0	0	\$0.00
01/13/2011	0	0	0	\$0.00
01/14/2011	0	0	0	\$0.00
01/15/2011	0	0	0	\$0.00
01/16/2011	0	0	0	\$0.00
01/17/2011	0	0	0	\$0.00
01/18/2011	1	0	1	(\$25.00)
01/19/2011	0	0	0	\$0.00

PLEASE NOTE THE FOLLOWING:

Coupons and Taxes - Taxes are calculated on what is in the product grid in terms of prices. So for example, if you have a coupon to discount an invoice by \$10.00, the taxes are still calculated on the sub-total which is the sum of the products in the grid. The customer pays the tax on the prices in the grid, not discounted values due to coupons. Coupons are applied to the invoice rather than a product.

Coupons cannot be added if there are no products listed in the Products grid.

If a coupon is added and fits the invoice criteria that is specified for the coupon, and then the user removes an item(s), the coupons will be checked for validity and automatically removed. If a coupon is to be removed, the user will be notified with the following message: "With the change to the invoice at least one coupon no longer applies."

If the user picks a coupon that can be the only coupon on the invoice, if they open the picker again, they will receive the following message: "The coupon that is currently chosen can be the only coupon on the invoice. Do you wish to remove it?" Click Yes to remove it or No to cancel the request.

The coupon amount cannot take the transaction below zero; that is if the subtotal with coupons would be less than zero, the system will show \$0.00 owing. If the coupon total is greater than the invoice total, the value of the coupons to be written to the G/L will equal the invoice; as only the invoice amount is being promo'd. If there is more than one coupon that result in the coupons being greater than the invoice total, the adjusted coupon amount to go to the G/L will be the coupon of the greatest value.

For any further questions, please contact:

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