

Chapter 4.04: Customer Retention Program

Introduction

The *Customer Retention Program* is a customer incentive program integrated into Route Manager. Customers can earn bonus points toward future purchases or bonus items. This is how the program works:

- ▶ Credits are earned for the purchase of goods and services. *Reward Points* are automatically recorded and credited to the customer's account for specific items when invoices are posted.
- ▶ Special offerings can be periodically presented to redeem points for new purchases of existing items or bonus items.
- ▶ Credit points are manually accounted for as they are redeemed and the current point count is reported on the customer receipt when using the handheld.

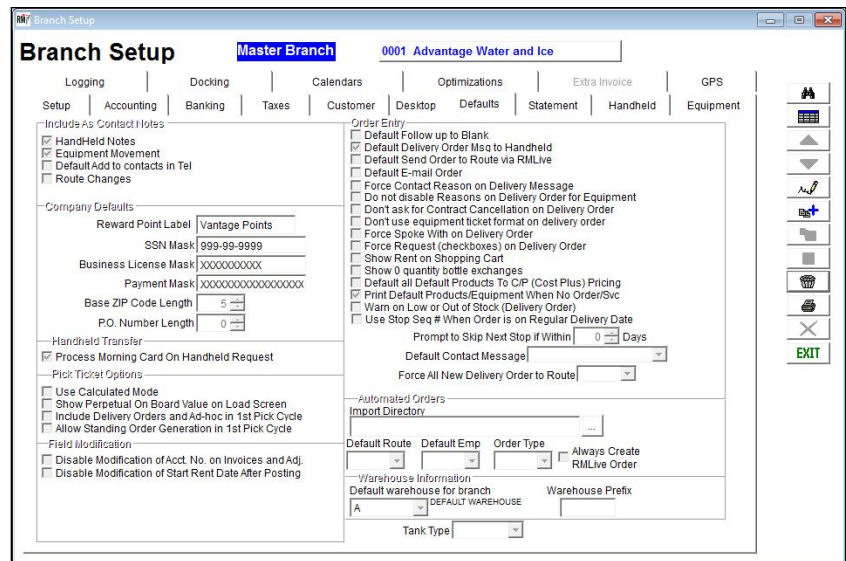
The concept is the same as frequent flyer program where your customers have a reason to stay with you instead of buying from your competition.

Setting up Reward Points

For the 'Customer Retention Program' to work properly, the following areas need to be setup: *Branch Setup*, *Customer Type Codes*, and *Product Charge Codes*. This section covers each of these modules in detail.

Branch Setup

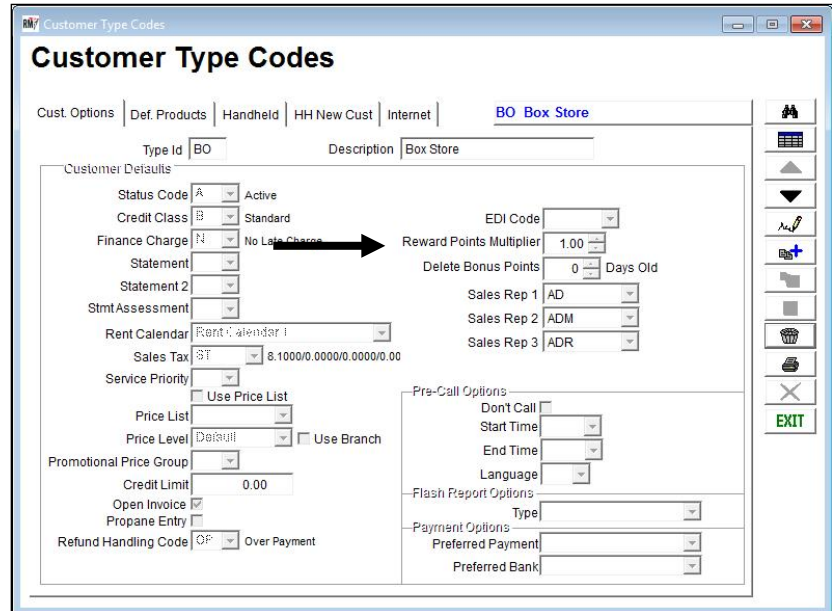
First, you will personalize the *Reward Point Label*. The name you select will appear on all screens associated with the point system. For this example, we have entered 'Vantage Points' as the label under *File > Branch Setup > Defaults* tab (below).



The screenshot shows the 'Branch Setup' window for 'Master Branch' and '0001 Advantage Water and Ice'. The 'Defaults' tab is selected. The 'Company Defaults' section is expanded, showing the 'Reward Point Label' set to 'Vantage Points'. Other settings include SSN Mask (999-99-9999), Business License Mask (XXXXXXXXXX), Payment Mask (XXXXXXXXXXXXXXXXXXXX), Base ZIP Code Length (5), and PO. Number Length (0). The 'Order Entry' section contains various checkboxes for default behaviors, such as 'Default Follow up to Blank', 'Default Delivery Order Msg to Handheld', and 'Default E-mail Order'. The 'Automated Orders' section includes 'Import Directory' and 'Always Create RMLive Order'. The 'Warehouse Information' section shows 'Default warehouse for branch' as 'A' and 'Warehouse Prefix' as 'DEFAULT WAREHOUSE'.

Customer Types

To enable *Reward Points* on a customer's account go to *Lists > Customer Setup Codes > Customer Type Codes*. An entry must be made under 'Reward Points Multiplier' on the *Cust. Options* tab, as shown below.

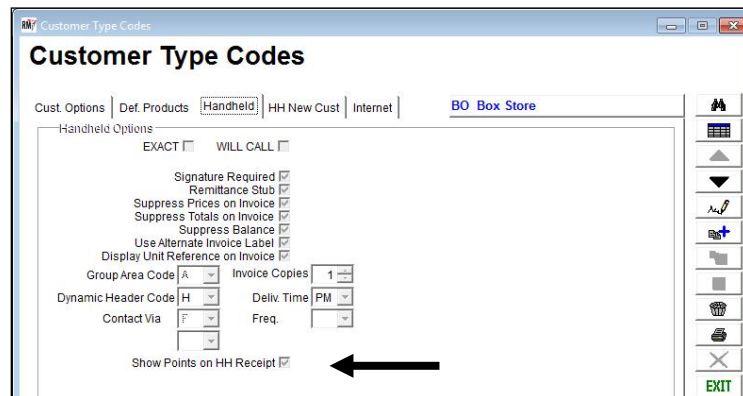


The screenshot shows the 'Customer Type Codes' window with the 'Cust. Options' tab selected. The 'Type Id' is 'BO' and the 'Description' is 'Box Store'. The 'Reward Points Multiplier' field is set to '1.00'. Other fields include Status Code (A), Credit Class (B), Finance Charge (N), Statement, Stmt Assessment, Rent Calendar (Rent Calendar 1), Sales Tax (ST), Service Priority, Price List, Price Level (Default), Promotional Price Group, Credit Limit (0.00), Open Invoice, Propane Entry, Refund Handling Code (OP), EDI Code, Delete Bonus Points (0 Days Old), Sales Rep 1 (AD), Sales Rep 2 (ADM), Sales Rep 3 (ADR), Pre-Call Options, Flash Report Options, and Payment Options.

The number of points per product will be multiplied by the number entered here. In this example, "1.00" has been entered. If the *Reward Points Multiplier* is left at "0.00", points will not accumulate on accounts assigned to the current *Customer Type Code*.

NOTE: Specify the 'Delete Reward Points....Days Old' field to automatically purge points after a certain amount of days.

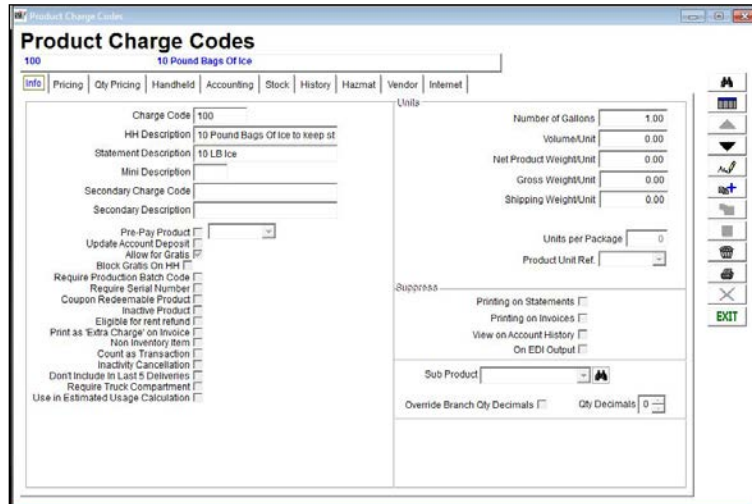
To include accumulated *Reward Points* on the customer's printed receipt go to *Lists > Customer Setup Codes > Customer Type Codes* and select the *Handheld* tab, then choose 'Show Points on HH Receipt'.



The screenshot shows the 'Customer Type Codes' window with the 'Handheld' tab selected. The 'Show Points on HH Receipt' checkbox is checked. Other fields include EXACT, WILL CALL, Signature Required, Remittance Stub, Suppress Prices on Invoice, Suppress Totals on Invoice, Suppress Balance, Use Alternate Invoice Label, Display Unit Reference on Invoice, Group Area Code (A), Invoice Copies (1), Dynamic Header Code (H), Deliv. Time (PM), Contact Via (F), and Freq.

Product Charge Codes

Reward Points must be manually accounted for as they are redeemed. This means that you must create a product code for the reward you are offering, whether it is a product you already sell, free rental, merchandise, etc. Go to *Lists > Product Codes > Product Charge Codes*.

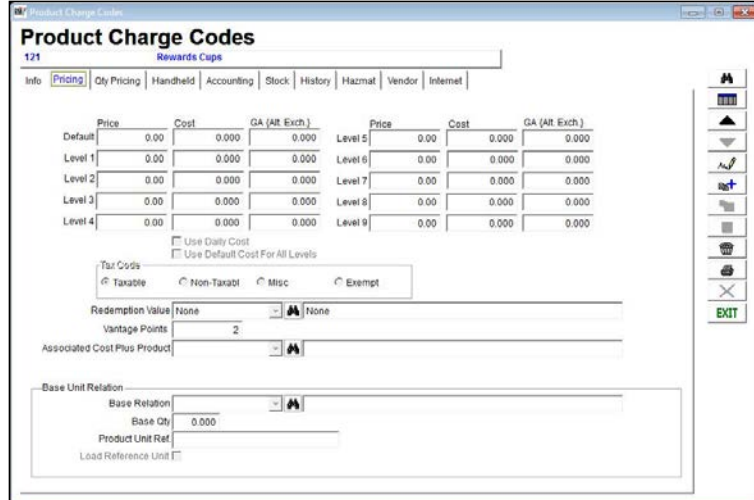


The screenshot shows the 'Product Charge Codes' form. The 'Charge Code' is '100' and the 'HH Description' is '10 Pound Bags Of Ice to keep st'. The 'Statement Description' is '10 LB Ice'. The 'Units' section shows 'Number of Gallons' as 1.00, 'Volume/Unit' as 0.00, 'Net Product Weight/Unit' as 0.00, 'Gross Weight/Unit' as 0.00, and 'Shipping Weight/Unit' as 0.00. The 'Pre-Pay Product' checkbox is checked. The 'Pricing' tab is selected at the top.

1. If you are offering merchandise, enter a charge code for the product, as well as the various descriptions in the appropriate fields. If you are offering a product that you already sell, enter a new charge code for that product.

NOTE: Do not delete an existing charge code for a product that you are offering as a reward product. You will simply have two charge codes for one product.

2. Next, click on the *Pricing* tab and enter the total number of 'Reward Points' it will take to receive the item for free, enter this amount as a negative number (shown below).



Product Charge Codes
121 Rewards Cups

Info Pricing Qty Pricing Handheld Accounting Stock History Hazmat Vendor Internet

	Price	Cost	GA (All Exch.)		Price	Cost	GA (All Exch.)
Default	0.00	0.000	0.000	Level 5	0.00	0.000	0.000
Level 1	0.00	0.000	0.000	Level 6	0.00	0.000	0.000
Level 2	0.00	0.000	0.000	Level 7	0.00	0.000	0.000
Level 3	0.00	0.000	0.000	Level 8	0.00	0.000	0.000
Level 4	0.00	0.000	0.000	Level 9	0.00	0.000	0.000

Use Daily Cost
 Use Default Cost For All Levels

Tax Code: Taxable Non-Taxabl Misc Exempt

Redemption Value: None

Vantage Points: 2

Associated Cost Plus Product:

Base Unit Relation

Base Relation:

Base Qty: 0.000

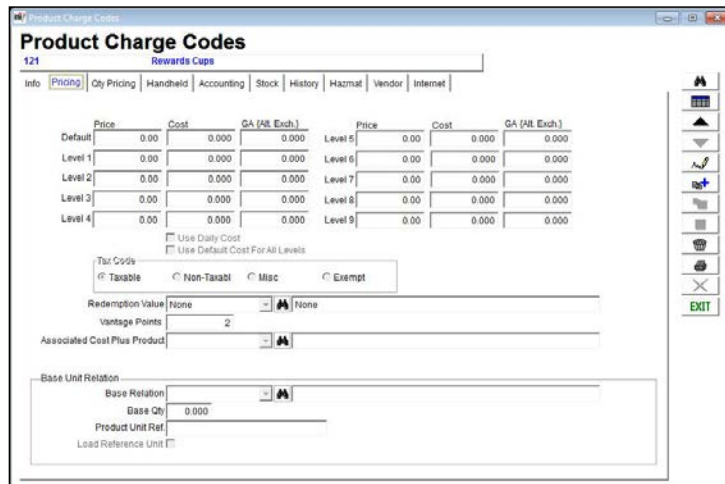
Product Unit Ref:

Load Reference Unit:

EXIT

3. Setup the remaining options for this product and 'Save' the new item.
4. Lastly, browse through all of your regular items for sale and enter the number of 'Vantage Points' redeemed for the sale of each. Repeat this step for all items that offer rewards to the customer for purchasing.

Example below: the customer accumulates 2-points when purchasing 'Rewards Cups'.



Product Charge Codes
121 Rewards Cups

Info Pricing Qty Pricing Handheld Accounting Stock History Hazmat Vendor Internet

	Price	Cost	GA (All Exch.)		Price	Cost	GA (All Exch.)
Default	0.00	0.000	0.000	Level 5	0.00	0.000	0.000
Level 1	0.00	0.000	0.000	Level 6	0.00	0.000	0.000
Level 2	0.00	0.000	0.000	Level 7	0.00	0.000	0.000
Level 3	0.00	0.000	0.000	Level 8	0.00	0.000	0.000
Level 4	0.00	0.000	0.000	Level 9	0.00	0.000	0.000

Use Daily Cost
 Use Default Cost For All Levels

Tax Code: Taxable Non-Taxabl Misc Exempt

Redemption Value: None

Vantage Points: 2

Associated Cost Plus Product:

Base Unit Relation

Base Relation:

Base Qty: 0.000

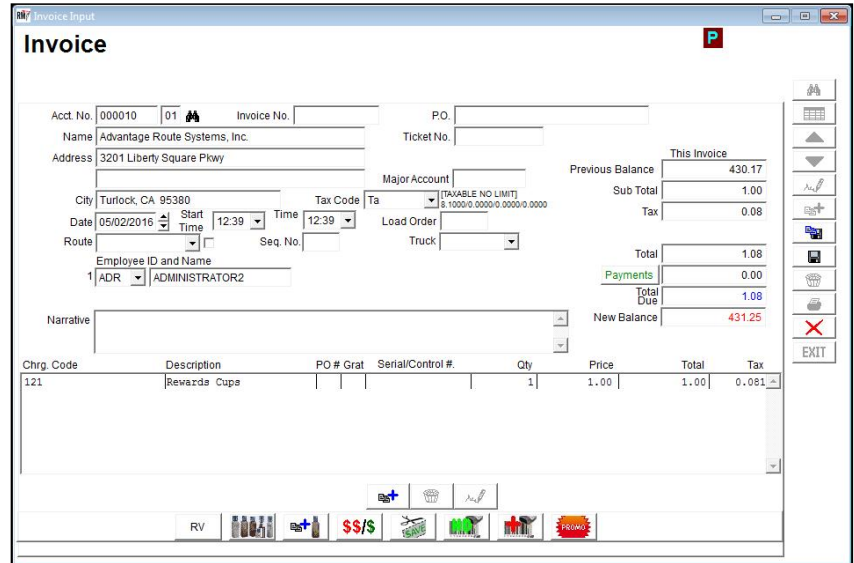
Product Unit Ref:

Load Reference Unit:

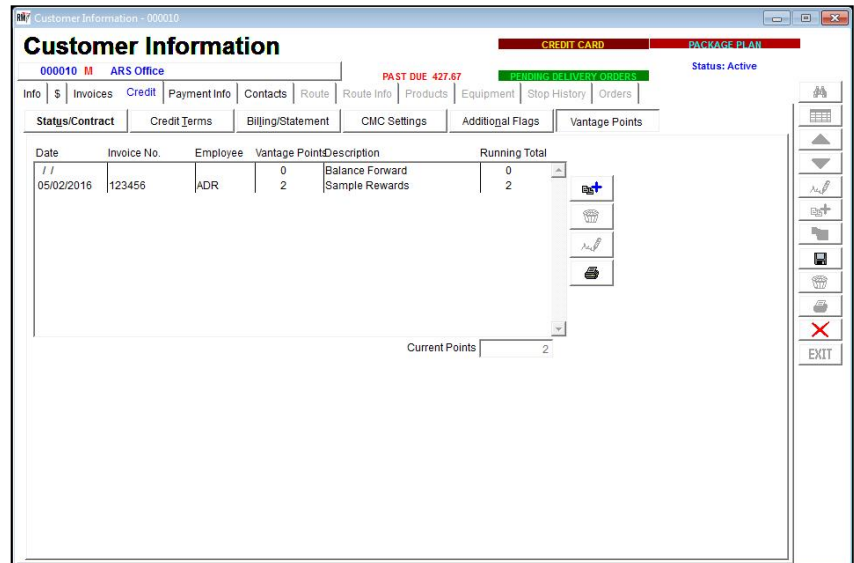
EXIT

Now that your reward products are set up, your customers will be able to redeem 'Reward Points.' To credit a customer's account for 'Reward Points,' invoice transactions must be posted.

In the example below, five (5) packages of Plastic Cups have been sold and posted to an account, accumulating two (2) points per package.



After the transaction is posted, the customer's account will be updated to reflect the *Reward Points* totals. The information is stored under the 'Reward Points' option within *Customer Information*, on the *Credit* tab.



NOTE: You can manually update the information displayed in the 'Reward Points' column by clicking the *Modify* option.

Point Status Report

Reward Points awarded are listed in the *Point Status Report*, found under *Reports, Accounting Reports>Customer*.

Status Report
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Status Report

Sort Option 1

by Customer ▾

Sort Option 2

by Type ▾

Change Branch(s)

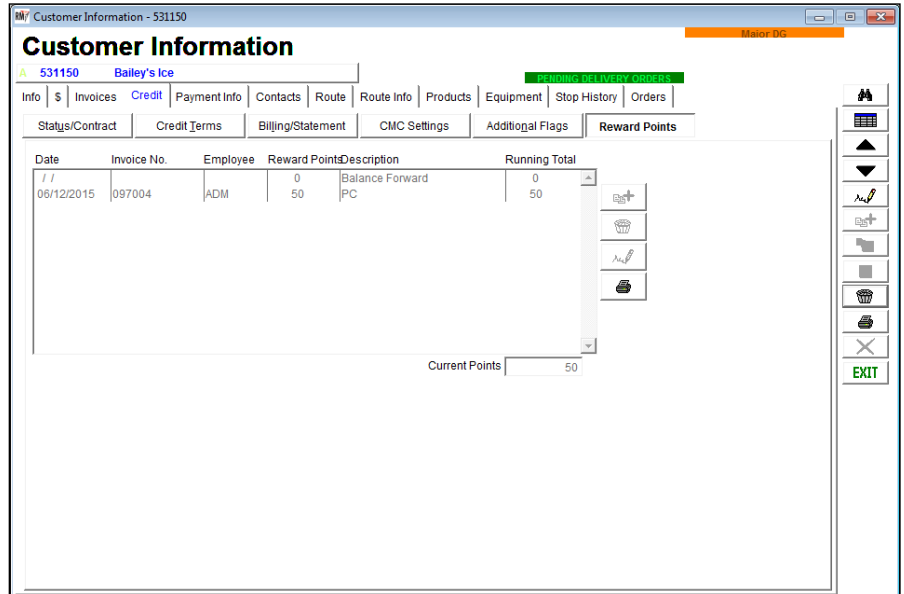
<u>Acct. No.</u>	<u>Current Points</u>	<u>Date</u>
From <input type="text"/>	From <input type="text" value="0.00"/>	From <input type="text" value="06/12/2015"/>
To <input type="text" value="999999"/>	To <input type="text" value="999999.99"/>	To <input type="text" value="06/12/2015"/>

Summary Totals Only

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FAX
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Redeeming Points

Once the customer has accumulated enough points to redeem an item, it will be necessary to create a transaction under *Invoices and Adjustments*. The account example below has accumulated 50 points (credit tab), giving the account enough points to qualify for the 'Ice Chest' promotion.



Customer Information - 531150

Customer Information

531150 Bailey's Ice

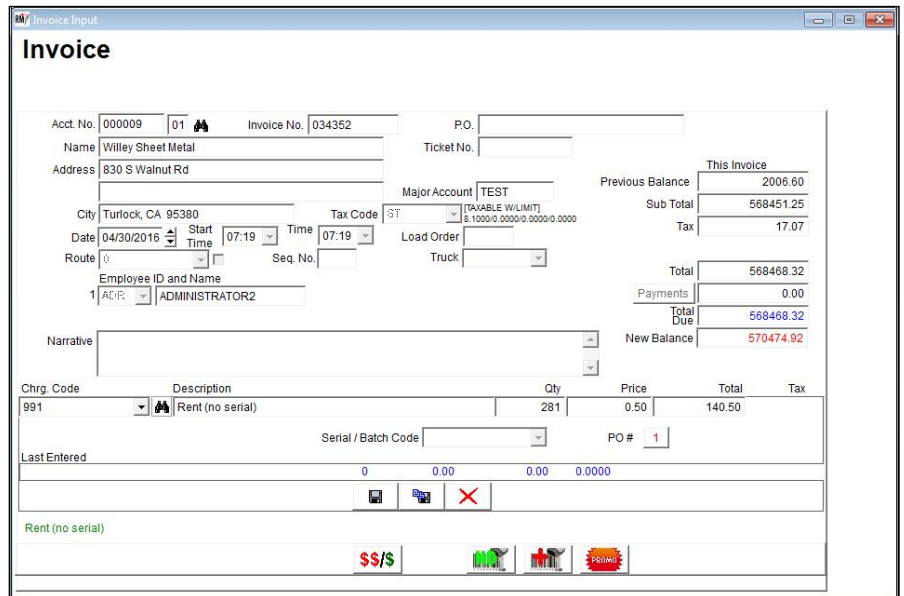
Info | Invoices | Credit | Payment Info | Contacts | Route | Route Info | Products | Equipment | Stop History | Orders

Status/Contract | Credit Terms | Billing/Statement | CMC Settings | Additional Flags | **Reward Points**

Date	Invoice No.	Employee	Reward Points	Description	Running Total
06/12/2015	097004	ADM	50	Balance Forward PC	0 50

Current Points: 50

An invoice is created and the 'Ice Chest' code is used.



Invoice Input

Invoice

Acct. No. 000009 01 Invoice No. 034352 P.O. _____

Name Willey Sheet Metal Ticket No. _____

Address 830 S Walnut Rd

City Turlock, CA 95380 Tax Code ST Major Account TEST Previous Balance 2006.60

Date 04/30/2016 Start Time 07:19 Time 07:19 Load Order _____ Sub Total 568451.25

Route 0 Seq. No. _____ Truck _____ Tax 17.07

Employee ID and Name
1 ACPR ADMINISTRATOR2 Total 568468.32

Narrative _____ Payments 0.00

Total Due 568468.32

New Balance 570474.92

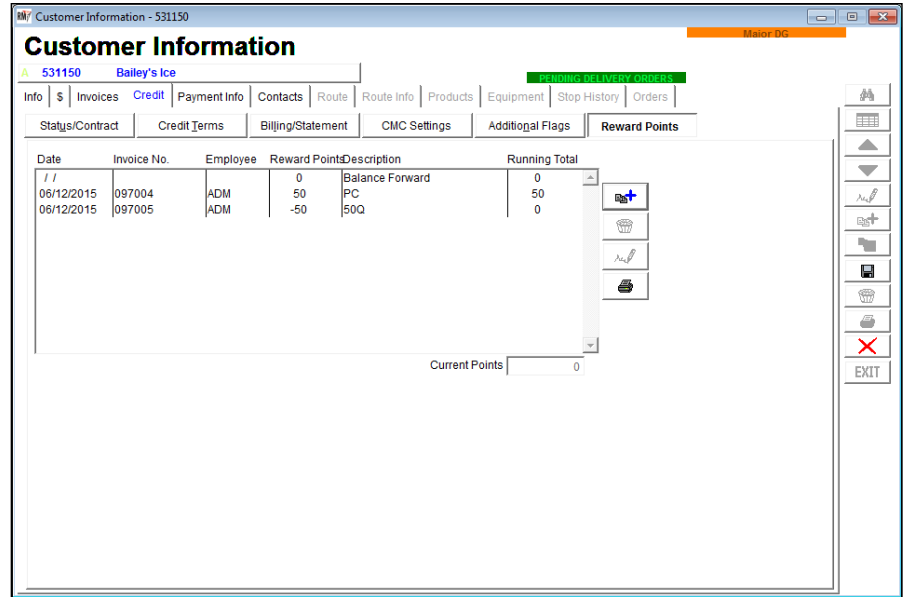
Chrg. Code	Description	Qty	Price	Total	Tax
991	Rent (no serial)	281	0.50	140.50	

Serial / Batch Code _____ PO # 1

Last Entered 0 0.00 0.00 0.0000

\$\$\$

Once the transaction is posted, the customer's *Reward Point* information is updated, the 'Ice Chest' invoice has used all of this customer's points (below).



Handheld

Each customer's total points are printed on their handheld receipt. However, only the points accumulated prior to the delivery are shown.

Any sales made on the handheld will accumulate new points as the transactions are transferred to the desktop and posted.

Once posted, they will they be viewable on the customer information tab as shown above.

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