iVend Loyalty

Loyalty Management & Customer Retention Application

Product Overview

Today, every retail chain faces intense competition and one of their biggest challenges is acquiring and retaining customers. The Loyalty Management Server is designed to significantly improve customer retention by bring them continuously back to the retail stores and at the same time aims to improve the customer satisfaction level. Against the transactions carried out at the stores using the iVend Retail Store & POS solution, customers can accrue and redeem points across the network of stores and in the process get rewarded for their loyalty.

The Loyalty Server is easy to configure and use and offers a plethora of configuration options that can be customized to derive maximum mileage out of the system. The Loyalty application installs on each store to provide powerful and quick processing of loyalty points and tenders and is completely real time. Deployment on individual stores also enables the Instant Redemption feature allowing customers to redeem their rewards instantly.

Product Features

The iVend Loyalty Server 3.0 solution offers a multitude of feature and functionality as listed below:

- ✓ Hassle Free Installation
- ✓ Out of the Box Configuration
- ✓ Usability & Design
- ✓ Key Features & Functionalities
- ✓ Integration and Customization Support

Hassle Free Installation

Intuitive Installation: The installer is designed to detect all prerequisites before starting with the actual installation process. In the absence of a prerequisite, the installer automatically installs the required components first.

Minimum User Input: Except for critical information such as database, SMTP and administration credentials, the installer performs most of the setup tasks on its own. The user is shielded from making errors.

Smooth Un-installation: The uninstall process is as trivial as the installation process. In most cases server restarts are not required.

Out of the Box Configuration

Default Setup: The Loyalty Server ships with a default configuration that is suitable for most retail enterprises. The merchant can choose to keep the default configuration pertaining to award and redeem of points and quickly go live.

Minimal Effort for Large Scale Implementation: iVend Loyalty supports great tools to support large scale implementation scenarios.
- Quickly take a backup of the head office database
- Restore the backup on the store
- Install the application using the same installer
- Configure user access for store managers

That is all. No re-implementation or data initialization routines means painless and hassle free implementation.

Proactive Alerts: Merchants using the iVend Loyalty application have the option to configure important loyalty events which can send scheduled and/or automated alerts to their customers to keep them updated and informed. The merchants get to view intuitive reports pertaining to their individual loyalty program.

Usability & Design

Wizard Based Setup: Most of the application configuration related to setup of Loyalty Cards, Users, Redemption and Award of Points and Loyalty Plans are completely wizard driven. The features are classified based on logical modules and present stepwise screens for setting up of features and functionalities. This guided mechanism eases the pains of an end user and minimizes possibilities of errors. Moreover, the default settings are preconfigured which are generally suitable for most customers.

Intuitive User Interface: Each control provides detailed feedback through tooltips and most grid based columns on all screens are sort-able. Quick Search feature along with user defined reports gets you to the most relevant data instantaneously. Combined with simple navigation and context based screens, the application is simple and easy to use.

Exception Management and User Help: The application handles most of the foreseeable error gracefully and navigates to the exact field that has generated the error when the error information is double clicked. An option to click on the error reporting hyperlink is provided that allows the end user to directly log on to the CitiXsys Support Center and generate a support ticket. Context sensitive help is provided on each screen which can be collapsed and expanded when the "F1" key is pressed.

Key Features & Functionalities

Auto Detect Operation Modes: iVend Loyalty is by default configured to operate in a real time mode i.e. replication and consolidation of data across stores and the head office happens in real time. However, when connectivity is not available it will process the transactions locally and then synchronize with the head office whenever the connectivity is restored.

Multiple Registration Modes: Registration of Loyalty Points can be configured in three modes. I can be either attached to a:
- ✓ Customer ID:
- ✓ Loyalty Card or:
- ✓ Loyalty Card Attached to a Customer ID:

Flexible Card Number Management and Allocation: Card Number generation is possible using either:
- ✓ Pre-Printed Loyalty Cards or
- ✓ System Generated Card Numbers: Creation of custom number schemes and generation of bulk numbers for distribution is offline mode is also provided in this mode
- ✓ Allocation of card numbers and number series to different stores is based on the mode of operation. When in online

mode, the numbers are issued in real time to the requesting POS while when in offline mode the distribution can be configured based on a combination of Store Codes and Store Group Codes

User Defined Loyalty Schemes: This feature allows definition of many combinations of criteria and user defined rules to configure and running multiple Loyalty Schemes. The heart of the application has the following features:

- ✓ Many Criterion combinations such as Customer Group, Item Group, Item, Promotion Scheme, Layaway Plan etc.
- ✓ Definition of Loyalty Points based on Quantity and Value with the ability to mark certain selections as exempt from the scheme
- ✓ Ability to include all possible criteria combinations using an "All" option
- ✓ Comprehensive Exclusion Rules that exclude items with Discount Overrides or Items marked as Promotional or items on Layaway etc.
- ✓ Possibility of running multiple schemes at any given point in time with the ability of Versioning each scheme
- ✓ Award of Loyalty Points based on Conflict Resolution rules and Hierarchal Fallback of Criteria Groups
- ✓ Detailed Audit Trails for all Scheme modifications within the system and much more.
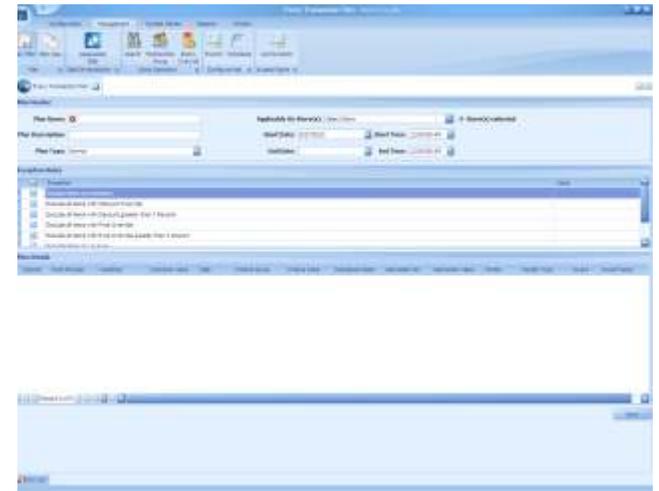
Slab Based Redemption of Points: All registered Loyalty Customers fall in one of the many user defined slabs that is the basis for redemption of Loyalty Points. Some useful features of Slab based Redemption are:

- ✓ User Defined Slabs e.g. Silver, Gold and Bronze
- ✓ Different Points-to-Currency conversion ratio for each Slab
- ✓ Different redemption percentage against an invoiced amount for each slab
- ✓ Different threshold limits and rules for upgrade to the next slab or downgrade to a slab below
- ✓ Slab versioning rules
- ✓ Current Slab and Fallback based redemption methods where the first allows for redemption of points by calculating points based on the current slab of the user while the latter begins with the current slab and iterates the next lower slab definitions when the threshold limit is exhausted

Rewards Management: This feature allows the functional administrator to manage the Loyalty Rewards in an effective manner. It is possible to award both points and currency to the loyalty customer simultaneously from multiple and simultaneous active plans. This module provides the features such as:

- ✓ Award and redemption of points and currency in a hybrid configuration.
- ✓ Points Journal that displays the minutest of details pertaining to award and redemption of points by a customer
- ✓ Loyalty Point Aging provides a time framed based aging of earned points either on the Customer Group, Customer ID or a Loyalty Card Number
- ✓ Loyalty Customer Status provides a flexible mechanism of upgrading or downgrading the status of a customer either in an automatically configured or a Manually Batch Process based manner.

Integration and Customization Support

Ubiquitous Web Service Support: Although the Loyalty application is tightly integrated with our iVend Retail application, it is also possible to integrate the application with practically any retail or ERP application using the universal and platform neutral web services based APIs. The APIs are supported with detailed documentation and provides publish/consume samples as illustration. Our 24X7 technical support team can also assist the willing customers during implementation.

Integration with SAP: CitiXsys is soon launching two more flavors of iVend Loyalty that shall be seamlessly integration with SAP Business One and All In One.
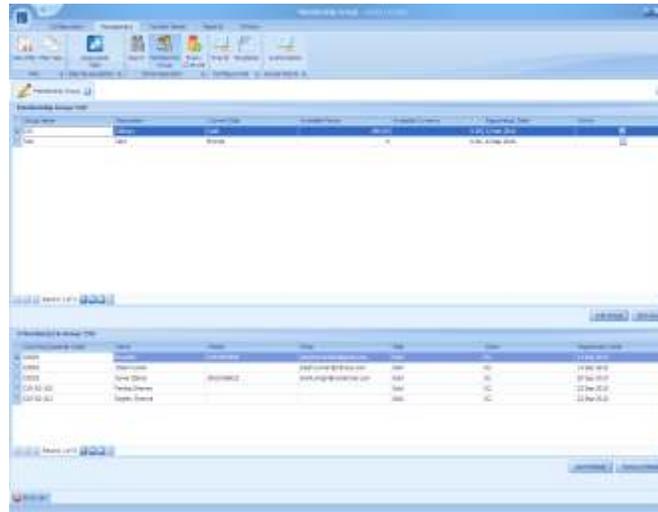
The iVend Loyalty Server application has many more features that can truly add tremendous value to any retailer by configuring, managing and tracking all schemes for enticing the customers and maximizing the brand value of the merchant.

Technology Description

This application has been meticulously designed on the cutting edge technologies and platforms in order to build scalability, maintainability and ease of use from ground up. The key technology features are listed below:

- ✓ .NET 4.0 Platform: A RAD standards based platform has in built OOPS capabilities that allow both scaling up and scaling out of applications.
- ✓ MS SQL Server 2008®: Enterprise level RDBMS that is excellent not only in storage of data but that has also broken many OLTP benchmarks
- ✓ Web Services 3.0: SOAP based calls from the Loyalty Server to the distributed Stores allow for a ready integration platform on the latest industry standards.
- ✓ ASP.NET 3.5: The leading and most popular of web development technologies provides OOPS based development standards and flexible deployment mechanisms
- ✓ SSIS (SQL Server Integration Services): A state of the art technology from MS SQL Server that quickly integrates with multiple back ends from many vendors using quick as well as drag-and-drop techniques (also called zero code development).

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