

# Customer Loyalty

## What is the Customer Loyalty Program?

CLP definitions exist as an extension of Vendor Receivable Deals. The mechanisms were already in place to define special manufacturer programs, the items that are involved, and the customers enrolled. Vendor Receivable Deals didn't, however, address the numerous conditions and requirements that were imposed by manufacturers as qualifiers for awarding participation money to retailers. DAC-CV1 CLP builds on the foundation provided by Vendor Receivable Deals and provides the means to define the qualifying criteria.

The CLP definitions are interfaced into the Deals, and can be accessed from several areas:

### Work with Deals:

Work with Vendor Deals now includes the ability to restrict the list of deals to only those that are part of CLP. Enter a "Y" for "CLP Only?" to restrict. See example below.

```
CVHXDFR   DISPLAY Creative Data Research-SUPPORT      8/26/03 14:38:45
                                Work with Deals
Vendor Deal  Deal Type CLP Only?
-----
                Y          Dates  Cents Off  Price  Incentive

Type options, press Enter.
2=Edit  C=Copy  Z=Zoom to Header  L=Loyalty Program

? Vendor Name
- CONWAY COMPANY, L.P.          1/01/03 No Restriction
  202 National Deal           N 12/31/03      /      /
L DURACELL                    10/01/02 Must Buy X in Each Group
  163 Duracell 2002 4th Q     N 12/31/02      /      /

F3=Exit  F4=Search  F10=Add
```

Key an “L” to access the Loyalty Program data:

Customer Loyalty Program							
Deal	163	Duracell 2002 4th Q	% Basis->	*NET*			
	* CLP 00016 MASTER DEFINITION *						
Prerequisite Deal	(Dependency)						
Goal Type	Must Buy	X in	Each Group	(PgUp/PgDwn)			
Level	Goal	Pct	\$Earn	Lower Level	Special	Group	
1	1		*OR* .500	(Lowest) Required?	Out of	GRPS	
2			*OR*	N	Out of	GRPS	
3			*OR*	(Highest) N	Out of	GRPS	
F3=Exit F4=Select F11=Delete							

CLP Master Definition:

The master definition record for CLP contains the default settings for a particular loyalty program. Please note that the text “\* CLP XXXXX Master Definition \*” denotes for the operator that they are working with the master record. The XXXXX represents the specific deal number. Also note the entries to the far right. They designate whether the requirements of a subordinate (lower) level of the definition must be satisfied prior to the higher level being considered.

Goal Types:

There are eight different possibilities for the Goal Types:

- 1) **Stock All Items in a Deal:** This would be used when all items must be regularly stocked to earn a rebate. Example:

Item #'s	Item	Pack	Need Stock	Level 1	Level 2	Level 3
57690	TRIDENT SPEARMINT VALUE PAK 12-CT	box	x	\$ 0.10		
57660	TRIDENT CINN VALUE PAK 12-CT	box	x	\$ 0.10		
62154	HALLS S-F BLACKCHRY STICK 20-CT	box	x	\$ 0.15		
77596	DENTYNE ICE ARCTIC CHILL 12-CT	box	x	\$ 0.09		
77597	DENTYNE ICE WINTERGREEN 12-CT	box	x	\$ 0.09		
74999	CERTS COOL MINT DROP FRESHMINT 12-CT	box	x	\$ 0.10		
74998	CERTS COOL PEPPERMINT DROP 12-CT	box	x	\$ 0.10		
75031	CERTS POWER MINT SPEARMINT 12-CT	box	x	\$ 0.16		
75030	CERTS POWER MINTS 12-CT	box	x	\$ 0.16		
77665	TRIDENT FRESHMINT VALU-PACK 12-CT	box	x	\$ 0.10		
61814	ROLAIDS EXTRA STRENGTH FRUIT 12-CT	box	x	\$ 0.08		
	<b>Must stock ALL Items to earn Rebate</b>					

2) **Merchandising Compliance:** This would be used when a minimum number of product facings is required to earn a rebate. Example:

Item #'s	Item	Pack	Need Stock	Level 1	Level 2	Level 3
85160	HAWKEN TOBACCO ROLL SHIP 5-CT	Roll		\$ 0.05	\$ 0.08	\$ 0.10
85171	KODIAK ICE LONG CUT ROLL 5-CT	Roll		\$ 0.05	\$ 0.08	\$ 0.10
85170	KODIAK TOBACCO ROLL 5-CT	Roll		\$ 0.05	\$ 0.08	\$ 0.10
85172	KODIAK LONG CUT STRAIGHT 5-CT	Roll		\$ 0.05	\$ 0.08	\$ 0.10
85135	COUGAR FULL FLAVOR SNUFF 5-CT	Roll		\$ 0.05	\$ 0.08	\$ 0.10
85137	COUGAR NATURAL LONGCUT 5-CT	Roll		\$ 0.05	\$ 0.08	\$ 0.10
85136	COUGAR WINTERGREEN SNUFF ROLL 5-CT	Roll		\$ 0.05	\$ 0.08	\$ 0.10
85138	COUGAR WINTERGREEN LONG CUT 5-CT	Roll		\$ 0.05	\$ 0.08	\$ 0.10
89182	GRIZZLY FC NATURAL	Roll		\$ 0.05	\$ 0.08	\$ 0.10
85160	HAWKEN TOBACCO ROLL SHIP 5-CT	Roll		\$ 0.05	\$ 0.08	\$ 0.10
85171	KODIAK ICE LONG CUT ROLL 5-CT	Roll		\$ 0.05	\$ 0.08	\$ 0.10
	<b>Regardless of level (1-2-3) one SKU each of Grizzly Natural &amp; Wintergreen must be included in the CONWAY set.</b>					
	<b>Requirements: Prevent out of stocks, Product and vendors prominently located in moist snuff section, participate in at least two CONWAY moist snuff consumer oriented promotions during the calendar year.</b>					

**Level 1 = Minimum 4 facing CONWAY vendor , Minimum 4 CONWAY brands authorized and stocked.**

**Level 2 = Minimum 6 facing CONWAY vendor , Minimum 5 CONWAY brands authorized and stocked.**

**Level 3 =Minimum 7 facing CONWAY vendor , Minimum 6 CONWAY brands authorized and stocked.**

Note: Compliance is something that will need to be determined outside of the computer system. There is no way for the CLP Programs to audit whether a retailer is adhering to the product placement criteria that is involved in a merchandising compliance agreement.

3) **Case Level Purchases Only:** This would be used when items must be purchased in case quantities to earn a rebate. Example:

Item #'s	Item	Pack	Need Stock	Level 1	Level 2	Level 3
98290	R&H PUMP CHOC-LO 6/#10	cs		\$ 1.56		
98480	R&H BUTTERSCOTCH TOPPING 6/#5	cs		\$ 1.08		
98490	R&H CARAMEL TOPPING 6/#5	cs		\$ 1.04		
98500	R&H CHERRY TOPPING CRUSHED 6/#	cs		\$ 1.40		
98505	R&H RICHBEST HOT FUDGE 6/#10	cs		\$ 2.43		
98510	HOT FUDGE SUNDAE TOPPING #400	cs		\$ 2.70		
98520	R&H MARSHMALLOW TOPPING 6/#5	cs		\$ 0.91		
98530	R&H PINEAPPLE TOPPING CRUSHED	cs		\$ 1.09		
98540	R&H STRAWBERRY TOPPING CRUSHED	cs		\$ 1.39		
98550	R&H CHOCOLATE CONE COAT 6/#10	cs		\$ 2.70		
98370	R&H BANANA SHAKE BASE 6/#5	cs		\$ 1.11		

**Level 1 = Must purchase all Items in Case Quantities ONLY.**

**Level 2 =**

**Level 3 =**

4) **Required Items to Buy:** This would be used when there are specific required items to buy to earn a rebate. Example:

Item #'s	Item	Pack	Need Stock	Level 1	Level 2	Level 3
42266	HAM #2243 PEPPERDALE CHOICE 10#			.01 per lb		
42268	HAM #2254 PEPPERDALE BUFFET 10#			.01 per lb		
42272	HAM #2242 SLICED PEPPERDALE 6/			.01 per lb		
42545	SAUSAGE #2030 PORK LINK 1-OZ 10#			\$ 0.10		
42547	SAUSAGE #2055 PORK PATTY 4/1 10#			\$ 0.10		
42570	POLISH SKINLESS #1380 4:1 10#			\$ 0.15		
42576	SAUSAGE #1350 CHEDDAR 5:1 10#			\$ 0.15		
42577	SAUSAGE #1756 HOT MAMAS 5:1 10#			\$ 0.15		
42580	HOTDOG #1750 SKINLESS NTRL 4:1			\$ 0.10		
PROMO	HAM #2250 PREM BONELESS APPROX			.01 per lb		
PROMO	HAM #2243 PEPPERDALE CHOICE 10#			.01 per lb		
PROMO	HAM #2264 PEPPERDALE PIT APPRO			.01 per lb		

**Requirements: Rebates earned on regular stock pricing only, bid pricing can not earn rebates.**

**Level 1 = Earn rebates on all purchases, must use Pepperdale exclusively for all Hams, Hot Dogs, Sausages.**

**Level 2 =**

**Level 3 =**



6) **Must Buy at Least “X” in Each Group:** This would be used there is a requirement to buy at least a certain amount of items in each group to earn a rebate. Example:

Item #'s	Item	Pack	Size	Level 1	Level 2	Level 3
Level 1						
70230	DUTCH MASTER PANATELA 5/5-PK			\$ 0.50		
70270	DUTCH MASTER PRESIDENT 5/5-PK			\$ 0.50		
72822	PHILLIE BLUNT 10/5-PACK			\$ 0.75		
72828	BACKWOODS BLACK & SWEET 6/8-PK			\$ 1.00		
72827	BACKWOODS SWEET AROMATIC 6/8-PK			\$ 1.00		
72829	BACKWOODS WILD-N-MILD ORIG 6/8-PK			\$ 0.75		
Level 2						
22831	BACKWOODS WILD RUM 6/8PK				\$ 0.75	
New	PHILLIES CHOCOLATE BLUNT 10/5 PK				\$ 0.75	

**Requirements**

**Level 1 = Must purchase a minimum of one item from each group (Dutch Master, A&C Grenadier, Hava Tampa, Backwoods) to earn rebate**

**Level 2 = Must meet level 1 requirements to earn rebate on level 2 items.**

7) **Buy at Least “X” Deal Items:** This would be used when minimum numbers of the deal items must be purchased to earn a rebate. Example:

Item #'s	Item	Pack	Size	Level 1	Level 2	Level 3
90090	CHEX MORNING MIX CINNAMON 12/1	box	12ct	\$ 0.093	\$ 0.186	\$ 0.233
90091	CHEX MORNING MIX FRUIT&NUT 12/1	box	12ct	\$ 0.093	\$ 0.186	\$ 0.233
97934	BUGLES NACHO CHEESE 7.5-OZ (12)	ea	7.5oz	\$ 0.034	\$ 0.068	\$ 0.086
97940	BUGLES ORIGINAL 3-OZ 5-CT	box	5ct	\$ 0.071	\$ 0.142	\$ 0.178
54154	GARDETTO ITALIAN RECIPE 5-OZ	ea		\$ 0.020	\$ 0.041	\$ 0.051
54155	GARDETTO DELUXE SNACK-ENS 5.5-	ea		\$ 0.020	\$ 0.041	\$ 0.051
54156	GARDETTO ITALIAN CHEESE 5-OZ (12)	ea		\$ 0.020	\$ 0.041	\$ 0.051
54157	GARDETTO MUSTARD PRETZELS 6.5-	ea		\$ 0.020	\$ 0.041	\$ 0.051
54159	GARDETTO REDUCE FAT SNAKENS 5.25	ea		\$ 0.020	\$ 0.041	\$ 0.051
54168	CHEXMIX TRADITIONAL 8.75-OZ (5)	ea	8.75oz	\$ 0.033	\$ 0.066	\$ 0.082
54169	CHEXMIX BOLD PARTY BLEND 8.75-(5)	ea	8.75oz	\$ 0.033	\$ 0.066	\$ 0.082
54170	CHEXMIX CHEDDAR 8.75-OZ (5)	ea	8.75oz	\$ 0.033	\$ 0.066	\$ 0.082
<b>Requirements</b>						
<b>Level 1 = Must consistently stock and sell a minimum of 7 of the Snack Items</b>						
<b>Level 2 = Must consistently stock and sell a minimum of 14 of the Snack Items</b>						
<b>Level 3 = Must consistently stock and sell a minimum of 22 of the Snack Items</b>						

8) **No Restrictions:** This would be used when there are no restrictions on the deal to earn a rebate.

CLP Detail Screen:

The CLP Detail screen provides a view of the detail elements that comprise the CLP definition. The CLP Detail screen is accessed from Work with Deals by choosing the “2=Edit” option beside a CLP related deal. Please note in the example below that CLP supports different incentive rates at the item level. Item level CLP overrides are accessed by entering an “L” beside the desired item.

Under column titled “Type” the CLP attribute for an item is displayed. CLP item attributes will be described later in this document.

```

CVHXDFR    DISPLAY Creative Data Research-SUPPORT      8/26/03 14:45:30
                    Work with Deals
Vendor Deal  Deal Type CLP Only?
  _____  -      Y      Dates  Cents Off  Price  Incentive

Type options, press Enter.
2=Edit  C=Copy  Z=Zoom to Header  L=Loyalty Program

? Vendor Name
2 CONWAY COMPANY, L.P.          1/01/03 No Restriction
   202 National Deal           N 12/31/03      /      /
- DURACELL                     10/01/02 Must Buy X in Each Group
   163 Duracell 2002 4th Q     N 12/31/02      /      /

F3=Exit  F4=Search  F10=Add
    
```

```

DCH8DFR    DISPLAY Creative Data Research-SUPPORT      8/26/03 14:48:08
                    CLP Details
Vendor W1920 CONWAY COMPANY, L.P.          No Restriction
Deal      202 National Deal          1/01/03 - 12/31/03
Item _____ Type _ Item Level Difference? N

2=Edit  D=Delete Item from Deal  L=Loyalty Item Level Overrides
? Item  Item Description          Type Goal  Goal $  Goal %
L 300200 BEECHNUT CHEWING TOBACCO 01200 CT          10.000      1
                                           2
                                           3

F3=Exit  F4=Search  F5=Enroll Items in Deal  F10=Edit Header
    
```

CLP Item Level Overrides:

When a particular loyalty program requires items to have incentive rates other than those defined in the CLP master definition record, they may be overridden at the item level.

Note that the item description appears for verification purposes. Also, note that the prerequisite deal entry is not present (or applicable) for an item level CLP definition.

When you first setup an item level CLP definition it will default to the entries from the master definition record. This was done for ease of maintenance.

Customer Loyalty Program						
Deal	202 National Deal		% Basis-> *NET*			
300200	BEECHNUT CHEWING TOBACCO 01200		CT			
Goal	Type	No Restriction	(PgUp/PgDwn)			
Level	Goal	Pct	\$Earn	Lower Level	Special	Group
1		_____	*OR* <u>10.000</u>	(Lowest)	Required?	
2			*OR*			
3			*OR*	(Highest)		
F3=Exit F4=Select F11=Delete						

CLP Item Attributes:

Some CLP types require that some items be further segregated into various types. These attributes are accessed by entering a "2=Edit" beside an item from within the CLP Details screen.

Valid attribute entries are:

- Item Groups (enter "1-5") for "Must Buy X in Each Group" types.
- Required Items (enter an "R") for "Required Items to Buy" CLP type.

```
DCH8DFR    DISPLAY Creative Data Research-SUPPORT      8/26/03 14:48:08
              CLP Details
Vendor W1920 CONWAY COMPANY, L.P.                No Restriction
Deal      202 National Deal                      1/01/03 - 12/31/03
Item _____ Type _ Item Level Difference? N

2=Edit  D=Delete Item from Deal  L=Loyalty Item Level Overrides
? Item  Item Description              Type Goal  Goal $  Goal %
2 300200 BEECHNUT CHEWING TOBACCO 01200  CT          10.000      1
                                     _____  _____  _____  2
                                     _____  _____  _____  3

F3=Exit  F4=Search  F5=Enroll Items in Deal  F10=Edit Header
```

```
CVH0E1R    CHANGE Creative Data Research-SUPPORT      8/26/03 14:56:38
              Edit Deal Details

Vendor . . . : W1920 CONWAY COMPANY, L.P.
Deal . . . . : 202 National Deal                No Restriction
Item . . . . : 300200 BEECHNUT CHEWING TOBACCO 01200  CT

              Customer Loyalty Attribute . . _

Type changes, press Enter.
Deal Type . . . . N Rebate Based on Net Cost
Deal Start Date . . . . : 10103
Deal End Date . . . . . : 123103
Qty Sold/Purchased . . . : 0

Discount % . . . . . _____ (for Wholesaler)
Rebate % . . . . . _____ (for Retailer)

F3=Exit  F11=Delete  F12=Key screen  F15=Unlock Dates
```

CLP Customer Enrollment:

Deal Customer Enrollment provides access to the enrolled customer's CLP status for each loyalty program. This is necessary in order to indicate that merchandising requirements have been met by a retailer. Merchandising requirements cannot be determined by the computer system and must rely on an audit of the retailer's store. Enter "C=CLP Status" beside a customer/deal to access the CLP status.

```
CVH1DFR      DISPLAY Creative Data Research-SUPPORT      8/26/03 15:00:20
              Customer Deal Enrollment
Customer Deal  Vendor
_____  _____  Status _ (CLP Levels 1-3, X=Excluded)

Type options, press Enter.
C=Edit CLP Level  D=Delete  V=View CLP  2=Edit Deal  E=Exclude  I=Include

? Cust#  Customer Name          Deal  Vendor Deal Description          STS
-
- 700200  ** GLOBAL ENROLLMENT **      202  W1920  National Deal
-          AMERICA'S STORE #103      202  W1920  National Deal
-          ** GLOBAL ENROLLMENT **      203  W1920  test stacking allowance
- 10210  EAGLES AUX *                  163  W2415  Duracell 2002 4th Q
- 25075  A & C DRUG                     163  W2415  Duracell 2002 4th Q
C 700100  AMERICA'S STORE #102          163  W2415  Duracell 2002 4th Q
- 700300  AMERICA'S STORE #104          163  W2415  Duracell 2002 4th Q
-          ** GLOBAL ENROLLMENT **      200  W3570  John's Test Deal
- 700300  AMERICA'S STORE #104          101  W4700  Test For Tracking ADC
-          ** GLOBAL ENROLLMENT **      5000 W4730  Trade Show
- 700200  AMERICA'S STORE #103          24   000120
- 7       TEST CUST              144  000120  Test CLP          +

F3=Exit  F4=Search  F8=Global Enrollment  F10=Enrollment Tool
```

```
              Edit Customer CLP Status
Deal :      163 Duracell 2002 4th Q
Customer 700100 AMERICA'S STORE #102

CLP Status _ (1,2,3 Level Attained)

F3=Exit
```

The Customer Loyalty Program Menu is reached by taking **Option #4** from the **Vendor Relations Menu**:

```
User: BARBARA          Menu: VRCV1          Date:
8/20/03

===== VENDOR RELATIONS =====
=====
|||||||
THE    ||      1. Vendor Deals & Tracking
DAC CV1||      2. Vendor Billing
SYSTEM||      3. Vendor Receivables
|||||||      4. Customer Loyalty Program
|||||||      5. Vendor/Customer Tracking

M E N U   C A L L S
19. Purchasing Menu    20.
22.                    23. Dac Main Menu    21.
                                     90. Sign Off

==> 4

-----
F3=Exit  F4=Prompt  F9=Retrieve  F12=Cancel
F13=Information Assistant  F16=AS/400 main menu
```

### Customer Loyalty Program Menu:

```
User: BARBARA          Menu: CLPCV1          Date: 8/26/03

===== > CUSTOMER LOYALTY PROGRAM <=====
=====
|||||||
THE    ||      1. Print Customer Loyalty Report
DAC CV1||      2. Display Customer Loyalty Status
SYSTEM||      3. Print CLP Definitions
|||||||      4. Enroll/Print Customer
|||||||      5. Customer Summary for Deals/CLPs

M E N U   C A L L S
19. Vendor Receivables  20.
22.                    23. Dac Main Menu    21.
                                     90. Sign Off

==>

-----
F3=Exit  F4=Prompt  F9=Retrieve  F12=Cancel
F13=Information Assistant  F16=AS/400 main menu
```

**Print Customer Loyalty Report:** Prints a report of customer earnings.

**Display Customer Loyalty Status:** For a specific customer, deal and vendor, displays the details of the status for that customer: level achieved, program dollars earned, and any product grouping information.

**Print CLP Definitions:** For selected vendor, or all vendors, prints a report of the CLP Master Definitions.

**Enroll/Print Customer:** Allows functions for enrolling, printing, or copying enrollment information for the customer.

**Customer Summary for Deals/CLPs:** Shows Customer Deal Summary, allowing for ranking and/or refreshing of selected or all deals.

### Print Customer Loyalty Report (Option #1):

The Customer Loyalty Report may be created by using **option 1** from the Customer Loyalty Program Menu.

```
User: BARBARA           Menu: CLPCV1           Date:
8/26/03

===== > CUSTOMER LOYALTY PROGRAM <=====
=====
|||||
THE    ||                1. Print Customer Loyalty Report
DAC CV1||              2. Display Customer Loyalty Status
SYSTEM ||              3. Print CLP Definitions
|||||                  4. Enroll/Print Customer
|||||                  5. Customer Summary for Deals/CLPs

                                M E N U   C A L L S
19. Vendor Receivables   20.
22.                      23. Dac Main Menu           21.
                                90. Sign Off

====> 1
-----
F3=Exit  F4=Prompt  F9=Retrieve  F12=Cancel
F13=Information Assistant  F16=AS/400 main menu
```

DCHDPVR	ENTER	Creative Data Research-SUPPORT	8/26/03 9:46:31
Customer Loyalty Report Selection			
Type choices, press Enter.			
Customer #	_____	(Blank for All)	
Vendor .	_____	(Blank for All)	
Deal # .	_____	(Blank for ALL)	
Start Date	_____	(Blank=No Date Restriction)	
End Date	_____	(Blank=No Date Restriction)	
Enter an Override Account Name If You Are Modeling from a Single Customer to Produce a Sample Report for a Propective Customer.			
Override Account Name	_____		
F3=Exit    F4=Search    F6=Print Detail    F18=Print Summary			

### Screen Fields:

**Customer #** – Can be Blank for ALL customers, or you may fill in the number if you know it, or us F4 to search and select the desired number.

**Vendor #** – Can be Blank for ALL vendors, or you may fill in the number if you know it, or us F4 to search and select the desired number.

**Deal #** – Can be Blank for ALL deals, or you may fill in the number if you know it, or us F4 to search and select the desired number.

**Date Range** – Can be Blank for ALL date ranges, or you may fill in the desired date ranges. (MMDDYY format)

**Override Account Name** – Fill this in is you would like to produce a report based on the selected customer, but with a different name, for purposes of producing a sample report for a prospective customer.

**To Produce the Customer Loyalty Program Report, press F6:**

Creative Data Research-Development	Customer Loyalty Program Report	BARBARA	DCG8PFR	8/26/03
15:39:12 Page	1			
	Amount Earned			Group/Required
Customer	30100 A.J.'S BEACON			
CLP	246	( Level 1 Goal	) (Level 2 Goal	) (Level 3 Goal )
LEVEL REACHED ->				
Type: Merchandising Compliance		DATES->	-	
Item 13221 DURACELL SIZE AA (2)		.00	BO	24
Item 860313 DURACELL BATTERY 9V 1604B		.00	PK	24
*Total 246	Merchandising Compliance	.00	*	48
	Items Purchased ->	2		
CLP	293 CLP Test Deal	( Level 1 Goal	2 ) (Level 2 Goal	4 ) (Level 3 Goal )
LEVEL REACHED ->	2			
Type: Minimum Purchases		DATES->	6/01/00 -	9/30/02
Item 552600 SNICKERS BAR KINGSIZE		336.00	BOX	48
*Total 293 CLP Test Deal	Minimum Purchases	336.00	*	48
	Items Purchased ->	1		
Vendor	40000 M & M / MARS	336.00	**	96
** Customer Totals	30100 **	336.00		
** END OF REPORT **				

**To Produce a Summary Report, key in a Deal# and press F18:**

Creative Data Research-SUPPORT	CLP Item Summary	BARBARA
DCMVPFR	8/26/03 10:02:	
Vendor	Name	Deal # Description From - To
000120	ADAMS & BROOKS INC	144 Test CLP
** END OF REPORT **		

## Display Customer Loyalty Status (Option #2):

The Customer Loyalty Status may displayed by using **option 2** from the Customer Loyalty Program Menu.

```
User: BARBARA           Menu: CLPCV1           Date:
8/26/03

===== > CUSTOMER LOYALTY PROGRAM <=====
=====
|||||||
THE      ||           1. Print Customer Loyalty Report
DAC CV1 ||           2. Display Customer Loyalty Status
SYSTEM  ||           3. Print CLP Definitions
|||||||           4. Enroll/Print Customer
|||||||           5. Customer Summary for Deals/CLPs

                                M E N U   C A L L S
19. Vendor Receivables      20.
22.                          23. Dac Main Menu      21.
                                90. Sign Off

==> 2 _____

F3=Exit  F4=Prompt  F9=Retrieve  F12=Cancel
F13=Information Assistant  F16=AS/400 main menu
```

```
DCINPVR   ENTER   Creative Data Research-SUPPORT      8/26/03 10:0
                                Customer CLP Status

Customer Number _____
Deal Number . _____
Vendor Number _____

CLP Level Achieved           Program $ Earned
Level 1 Goal                 0
Level 2 Goal                 0
Level 3 Goal                 0

Product Grouping Information

F3=Exit  F4=Search  F10=View Details
```

**Customer #** – You may fill in the number if you know it, or us F4 to search and select the desired number.

**Vendor #** – You may fill in the number if you know it, or us F4 to search and select the desired number.

**Deal #** – You may fill in the number if you know it, or us F4 to search and select the desired number.

```

DCINPVR   ENTER   Creative Data Research-SUPPORT           8/26/03 10:13:19
                        Customer CLP Status

Customer Number 700300 EAGLES AUX *
Deal Number .   144 Duracell 2002 4th Q           Must Buy X in Each Group
Vendor Number   000120 DURACELL

CLP Level Achieved      Program $ Earned
Level 1 Goal           1
Level 2 Goal           0
Level 3 Goal           0

                        *GROUPS*
Product Grouping Information

F3=Exit  F4=Search  F10=View Details
  
```

Press **F10** to view details:

```

                        Customer CLP Detail

144 Test CLP           6/01/02 - 12/31/02 Item
700300 AMERICA'S STORE #104      ADAMS & BROOKS INC

Type options, press Enter.
Z=Zoom
? Item Description           Invoice# Qty UM 1 Qty UM 2
- VIRG SLIM ULTRA LIGHT MENTHOL      7426           1
Z DORAL ULTRA LIGHTS           7426           15
- DORAL ULTRA LIGHTS           7444           2
- DORAL ULTRA LIGHTS           7501           2
- DORAL ULTRA LIGHTS           7645           2-
- MARLBORO BOX 100'S           7645           2-
- DORAL ULTRA LIGHTS           7654           +

F3=Exit
  
```

Key a "Z" to Zoom to details: (DISPLAY only)

CVLMD1R	DISPLAY Creative Data Research-SUPPORT	8/26/03 10:18:39
Receivable Detail		
Customer Number . . . :	700300 AMERICA'S STORE #104	
Item Number . . . . . :	1604 DORAL ULTRA LIGHTS	
Vendor . . . . . :	000120 ADAMS & BROOKS INC	
Deal Number . . . . . :	144 Test CLP	
Invoice Number . . . :	7426	
Deal Type . . . . . :	N	
Amount Due . . . . . :		
Qty U/M 1 . . . . . :	15	
Qty U/M 2 . . . . . :		
Retailer Amount . . . . :	.79	
Distributor Amount . . . :		
Deal Price . . . . . :		
Deal Percent . . . . . :		
Post Date . . . . . :	6/27/02	
Line Item Info: Price	27.90	Net 26.40
F3=Exit		

### Print CLP Definitions (Option #3):

The CLP Definitions Report may be printed by using **option 3** from the Customer Loyalty Program Menu.

```
User: BARBARA           Menu: CLPCV1           Date:
8/26/03

===== > CUSTOMER LOYALTY PROGRAM <=====
=====
|||||||
THE      ||           1. Print Customer Loyalty Report
DAC CV1 ||           2. Display Customer Loyalty Status
SYSTEM  ||           3. Print CLP Definitions
|||||||           4. Enroll/Print Customer
|||||||           5. Customer Summary for Deals/CLPs

                                M E N U   C A L L S
19. Vendor Receivables   20.
22.                      23. Dac Main Menu           21.
                                90. Sign Off

====> 3 _____
F3=Exit  F4=Prompt  F9=Retrieve  F12=Cancel
F13=Information Assistant  F16=AS/400 main menu
```

```
DCJGPVR  ENTER  Creative Data Research-SUPPORT      8/26/03 10:22:27
                CLP Print Definitions

Type choices, press Enter.

Vendor _____ (Blank for All)

F3=Exit  F4=Search  F6=Submit Print
```

**Vendor #** – Can be Blank for ALL vendors, or you may fill in the number if you know it, or us F4 to search and select the desired number.

Press **F6** to Submit the Report:

Sample of "No Restriction" Type:

Betty's Wholesale		CLP Definitions		BARBARA	DCI2PFR	8/28/03 12:58:37	
Page	1						
Vendor	W0120 LAMBERT & SONS						
Deal	30 GEORGES	Type: No Restriction		Dates:	1/01/03 - 12/31/03	Pre-Requisite	CLP
Item	Description	Goal	%	\$Earn	Require Lower?	Special Group	Group/Required
* MASTER CLP DEFINITION *		Level 1 ->	0	1.50			
		Level 2 ->	0	.00	N		
		Level 3 ->	0	.00	N		
43824	TRIDENT ASSORTED 8PK (20)	Level 1 ->	0	1.50			
		Level 2 ->	0	.00	N		
		Level 3 ->	0	.00	N		
43830	TRIDENT FRESHMINT 8PK (20)	Level 1 ->	0	1.50			
		Level 2 ->	0	.00	N		
		Level 3 ->	0	.00	N		
43996	CERTS FRESH MIXED FRUIT 24-CT	Level 1 ->	0	1.50			
		Level 2 ->	0	.00	N		
		Level 3 ->	0	.00	N		

Sample of "Must Buy 'X' in Each Group" Type:

Vendor	W0300 SAMMY'S CONSOLIDATED						
Deal	33 ATLANTIC USA	Type: Must Buy X in Each Group		Dates:	1/01/03 - 12/31/03	Pre-Requisite	CLP
Item	Description	Goal	%	\$Earn	Require Lower?	Special Group	Group/Required
* MASTER CLP DEFINITION *		Level 1 ->	1	.00	.750		
		Level 2 ->	1	.00	.750	Y	4
		Level 3 ->	0	.00		N	
55230	D.M. PANATELA 5/5PK	Level 1 ->	0	.00		1	-> 4 <-
		Level 2 ->	1	.00	.500	N	4 *ITEM DEFINITION*
		Level 3 ->	0	.00		N	
55270	D.M. PRESIDENTS 5/5PK	Level 1 ->	0	.00		1	-> 4 <-
		Level 2 ->	1	.00	.500	N	4 *ITEM DEFINITION*
		Level 3 ->	0	.00		N	
55822	PHILLIES BLUNT 10/5PK	Level 1 ->	0	.00		1	-> 4 <-
		Level 2 ->	1	.00	.750	N	4 *ITEM DEFINITION*
		Level 3 ->	0	.00		N	
55040	A&C GRENADIER DARK (GOLD) 10/6PK	Level 1 ->	0	.00		1	-> 3 <-
		Level 2 ->	1	.00	1.000	N	4 *ITEM DEFINITION*
		Level 3 ->	0	.00		N	

### Samples of "Buy at Least X Deal Items" Type:

Vendor W0670 BEELLER COMPANY		Type: Buy at Least X Deal		Items	Dates:	1/01/03 - 12/31/03	Pre-Requisite	CLP
Deal	Item Description	Goal	%	\$Earn	Require Lower?	Special Group	Group/	Required
	* MASTER CLP DEFINITION *	Level 1 ->	26	2.00				
		Level 2 ->	41	3.00	Y			
		Level 3 ->	60	4.00	Y			
67859	SUNSHINE CHEEZ-IT BOX 2-OZ (24)	Level 1 ->	26	2.00				
		Level 2 ->	41	3.00	Y			
		Level 3 ->	60	4.00	Y			
67892	SUNSHINE VIENNA FINGER 16-OZ (12)	Level 1 ->	26	2.00				
		Level 2 ->	41	3.00	Y			
		Level 3 ->	60	4.00	Y			

Vendor W0955 MANNY MANUFACTURING COMPANY		Type: Buy at Least X Deal		Items	Dates:	1/01/03 - 12/31/03	Pre-Requisite	CLP
Deal	Item Description	Goal	%	\$Earn	Require Lower?	Special Group	Group/	Required
	* MASTER CLP DEFINITION *	Level 1 ->	1	3.00				
		Level 2 ->	0	.00	N			
		Level 3 ->	0	.00	N			
88600	SCOTCH TRANSPARENT TAPE #14422 1CT	Level 1 ->	1	3.00				-> 4 <-
		Level 2 ->	0	.00	N			
		Level 3 ->	0	.00	N			
88602	MASKING TAPE 3/4 X 90 #14717	Level 1 ->	1	3.00				-> 4 <-
		Level 2 ->	0	.00	N			
		Level 3 ->	0	.00	N			
88800	STYLING COMB LARGE #15001 1CT	Level 1 ->	1	3.00				-> 4 <-
		Level 2 ->	0	.00	N			
		Level 3 ->	0	.00	N			

Vendor W1220 WISHER INTERNATIONAL INC 1		Type: Buy at Least X Deal		Items	Dates:	1/01/03 - 12/31/03	Pre-Requisite	CLP
Deal	Item Description	Goal	%	\$Earn	Require Lower?	Special Group	Group/	Required
	* MASTER CLP DEFINITION *	Level 1 ->	3	.00	.500		1	
		Level 2 ->	3	.00	1.000	Y	2	
		Level 3 ->	0	.00		N		
41529	WISHER CHERRY TIP CIGARILLO 20/5PK	Level 1 ->	3	.00			1	-> 2 <-
		Level 2 ->	3	.00	1.000	Y	2	*ITEM DEFINITION*
		Level 3 ->	0	.00		N		
41535	WISHER SWEET GIANTS 10/5PK	Level 1 ->	3	.00			1	-> 2 <-
		Level 2 ->	3	.00	1.000	Y	2	*ITEM DEFINITION*
		Level 3 ->	0	.00		N		
41544	POPTIMO CORONA NATURAL UPRIGHT 25CT	Level 1 ->	3	.00			1	-> 2 <-
		Level 2 ->	3	.00	.750	Y	2	*ITEM DEFINITION*
		Level 3 ->	0	.00		N		
41545	POPTIMO CORONA RUM NAT UPRIGHT 25CT	Level 1 ->	3	.00			1	-> 2 <-
		Level 2 ->	3	.00	.750	Y	2	*ITEM DEFINITION*
		Level 3 ->	0	.00		N		

### Samples of "Minimum Purchase" Type:

Vendor W0950 STATE TOBACCO COMPANY		Type: Minimum Purchases		Dates:	1/01/03 - 12/31/03	Pre-Requisite	CLP
Deal	Item Description	Goal	%	\$Earn	Require Lower?	Special Group	Group/
	* MASTER CLP DEFINITION *	Level 1 ->	1	.00	.300		
		Level 2 ->	2	.00	.750	Y	
		Level 3 ->	0	.00		N	
55180	DURANGO CHEWING TOBACCO POUCH 12CT	Level 1 ->	1	.00	.300		
		Level 2 ->	2	.00	.750	Y	
		Level 3 ->	0	.00		N	

Vendor W0140 MY LICORICE COMPANY		Type: Minimum Purchases		Dates:	1/01/03 - 12/31/03	Pre-Requisite	CLP
Deal	Item Description	Goal	%	\$Earn	Require Lower?	Special Group	Group/
	* MASTER CLP DEFINITION *	Level 1 ->	4	.00	.033		
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
91246	SOUR PUNCH STRAWS BLUE RASPBRY 24CT	Level 1 ->	4	.00	.400		
		Level 2 ->	0	.00		N	*ITEM DEFINITION*
		Level 3 ->	0	.00		N	
91247	SOUR PUNCH STRAWS STRAWBERRY 24CT	Level 1 ->	4	.00	.400		
		Level 2 ->	0	.00		N	*ITEM DEFINITION*
		Level 3 ->	0	.00		N	
91690	SUPER RED ROPE 60-CT	Level 1 ->	4	.00	.800		
		Level 2 ->	0	.00		N	*ITEM DEFINITION*
		Level 3 ->	0	.00		N	
92990	AMERICAN LIC RED VINES HB 8OZ (12)	Level 1 ->	4	.00	.016		
		Level 2 ->	0	.00		N	*ITEM DEFINITION*
		Level 3 ->	0	.00		N	

Sample of "Stock All Items in a Deal" Type:

Vendor W5038 FARMCITY FOODS		Type: Stock All Items in Deal		Dates: 1/01/03 - 12/31/03		Pre-Requisite CLP	
Deal	60 FARMCITY/SARGE	Goal	%	\$Earn	Require Lower?	Special Group	Group/Required
	* MASTER CLP DEFINITION *	Level 1 ->	0	.00	.240		
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
28121	SARGE CHOCOLATE MILK 12/32-OZ	Level 1 ->	0	.00	.240		
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
28123	SARGE DOUBLE CHOCOLATE 12/16-OZ	Level 1 ->	0	.00	.240		
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
28125	SARGE CHOCOLATE MILK 12/16-OZ	Level 1 ->	0	.00	.240		
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
28126	SARGE STRAWBERRY MILK 12/16-OZ	Level 1 ->	0	.00	.240		
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	

Sample of "Case Level Purchases Only" Type:

Vendor W0993 EVERYDAY OIL COMPANY		Type: Case Level Purchases Only		Dates: 1/01/03 - 12/31/03		Pre-Requisite CLP	
Deal	67 HOPPED UP MOTOR OIL	Goal	%	\$Earn	Require Lower?	Special Group	Group/Required
	* MASTER CLP DEFINITION *	Level 1 ->	0	.00	.240		
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
73910	HOPPED UP MOTOR OIL 5/30 12/1QT CS	Level 1 ->	0	.00	.240		
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
73911	HOPPED UP MOTOR OIL 5/30 12/1QT (84)	Level 1 ->	0	.00	.240		
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
73924	HOPPED UP MOTOR OIL 10/30 12/1 CS	Level 1 ->	0	.00	.240		
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
73925	HOPPED UP MOTOR OIL 10/30 12/1QT(84)	Level 1 ->	0	.00	.240		
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	

Sample of "Merchandising Compliance" Type:

Vendor W0925 PEACOCK FOODS		Type: Merchandising Compliance		Dates: 1/01/03 - 12/31/03		Pre-Requisite CLP	
Deal	140 PEACOCK SALTY SNACK	Goal	%	\$Earn	Require Lower?	Special Group	Group/Required
68178	PEACOCK SALTED CASHEWS 24CT (NP)	Level 1 ->	0	6.00			
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
68180	PEACOCK DRY ROAST PEANUT 24-3/99¢	Level 1 ->	0	6.00			
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
68185	PEACOCK CASHEWS 24/69¢	Level 1 ->	0	6.00			
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
68190	PEACOCK PEANUTS 24-3/99¢	Level 1 ->	0	6.00			
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	
68191	PEACOCK HONEY ROAST PEANT 24-3/99¢	Level 1 ->	0	6.00			
		Level 2 ->	0	.00		N	
		Level 3 ->	0	.00		N	

## Enroll/Print Customer (Option #4):

The Enroll/Print Customer may be accessed by using **option 4** from the Customer Loyalty Program Menu.

```
User: BARBARA           Menu: CLPCV1           Date:
8/26/03

===== > CUSTOMER LOYALTY PROGRAM <=====
=====
|||||||                1. Print Customer Loyalty Report
THE      ||            2. Display Customer Loyalty Status
DAC CV1 ||            3. Print CLP Definitions
SYSTEM  ||            4. Enroll/Print Customer
|||||||                5. Customer Summary for Deals/CLPs

                                M E N U   C A L L S
19. Vendor Receivables        20.
22.                            23. Dac Main Menu        21.
                                90. Sign Off

===> 4

-----
F3=Exit  F4=Prompt  F9=Retrieve  F12=Cancel
F13=Information Assistant  F16=AS/400 main menu
```

```
DCKKPVR  ENTER  Creative Data Research-SUPPORT      8/26/03 10:51:24
                CLP Customer Enrollment

Customer _____

Press F10 to Enroll This Customer In All Customer Loyalty Programs

F6 Without a Customer Number Will Print All CLP Enrollments.
Specify a Customer Number to Print a Single Customer's Enrollment Information.

F20 Will Copy CLP Enrollment From the Customer to the Target Customer.

Target Customer _____

F3=Exit  F4=Search  F6=Print  F10=Enroll Customer  F20=Copy Enrollment
```

**Customer #** – You may fill in the number if you know it, or us F4 to search and select the desired number.

Use **F10** to enroll the customer into All Customer Loyalty Programs:  
 Answer **"Y"** in the pop-up window to continue the enrollment.

```

DCKKPVR   ENTER   Creative Data Research-SUPPORT      8/26/03 10:54:47
                        CLP Customer Enrollment

                Customer 700300

                Press F10 to Enrol      This will enroll the      lty Programs
                F6 Without a Cu      selected customer in all
                Specify a Customer Number CLP's. Continue?      ollments.
                F20 Will Copy CLP En      Y                          ment Information.
                Target Customer      rget Customer.

F3=Exit   F4=Search   F6=Print   F10=Enroll Customer   F20=Copy Enrollment
  
```

Use **F6** to Print Enrollment List:

```

Creative Data Research-SUPPORT   CLP Enrollment List   BARBARA   DCKLPFR   8/26/03 10:59:20   Page   1

Customer 10210 EAGLES AUX *
Vendor Vendor Name
W2415 DURACELL

Deal Deal Description      Level
163 Duracell 2002 4th Q

Customer 25075 A & C DRUG
Vendor Vendor Name
W2415 DURACELL

Deal Deal Description      Level
163 Duracell 2002 4th Q

Customer 700300 AMERICA'S STORE #104
Vendor Vendor Name
W2415 DURACELL

Deal Deal Description      Level
163 Duracell 2002 4th Q

** END OF REPORT **
  
```

Use **F20** to copy enrollment from one Customer to another:

```
DCKKPVR   ENTER   Creative Data Research-SUPPORT      8/26/03 11:03:51
                                CLP Customer Enrollment

                                Customer 700300 AMERICA'S STORE #104

                                Press F10 to Enroll This Customer In All Customer Loyalty Programs

                                F6 Without a Customer Number Will Print All CLP Enrollments.
                                Specify a Customer Number to Print a Single Customer's Enrollment Information.

                                F20 Will Copy CLP Enrollment From the Customer to the Target Customer.

                                Target Customer 700100 AMERICA'S STORE #102

                                F3=Exit   F4=Search   F6=Print   F10=Enroll Customer   F20=Copy Enrollment
```

```
DCKKPVR   ENTER   Creative Data Research-SUPPORT      8/26/03 11:03:51
                                CLP Customer Enrollment

                                Customer 700300 AMERICA'S STORE #104

                                Press F10 to   This will copy all CLP's   Loyalty Programs
                                F6 Without   from the first customer
                                Specify a Customer N   to the target. Continue?   P Enrollments.
                                F20 Will Copy C   Y   nrollment Information.

                                Target Customer 700100 AMERICA'S STORE #102   he Target Customer.

                                F3=Exit   F4=Search   F6=Print   F10=Enroll Customer   F20=Copy Enrollment
```

Answer the pop-up box with a “Y” to continue the enrollment.

**Customer Summary for Deals/CLPs (Option #5):**

The Customer Summary for Deals/CLPs may be accessed by using **option 5** from the Customer Loyalty Program Menu.

```

User: BARBARA           Menu: CLPCV1           Date:
8/26/03

===== > CUSTOMER LOYALTY PROGRAM <=====
=====
|||||||                1. Print Customer Loyalty Report
THE      ||            2. Display Customer Loyalty Status
DAC CV1 ||            3. Print CLP Definitions
SYSTEM  ||            4. Enroll/Print Customer
|||||||                5. Customer Summary for Deals/CLPs

                                M E N U   C A L L S
19. Vendor Receivables      20.
22.                          23. Dac Main Menu      21.
                                90. Sign Off

===> 5

-----
F3=Exit  F4=Prompt  F9=Retrieve  F12=Cancel
F13=Information Assistant  F16=AS/400 main menu

```

```

DCL7DFR  DISPLAY Creative Data Research-SUPPORT      8/26/03 11:10:44
                                Customer Deal Summary
Customer Name                    Cust# Deal# Vendor
-----
Type options, press Enter.
Z=Zoom to Details
? Customer Name                  Cust# Deal Deal Description
Z AIRPORT GIFT SHOP              20384 231 JOLT B3G1F CASE DEAL
WET PLANET BEVERAGES            Vendor 84414 Dates 7/01/03 - 12/31/03
  Retailer $ Distributor $ Qty UM1 Qty UM2 CLP $Earned
  -----
  13.95                2
- AMERICA'S STORE #102          700100 125 Homefolk's Test
M & M MARS CANDY COMPANY        Vendor 40001 Dates 4/01/02 - 12/31/02
  Retailer $ Distributor $ Qty UM1 Qty UM2 CLP $Earned
  -----
  2.50                1
+

F3=Exit F4=Search F6=Ranking Report F10=Refresh a Deal F22=Refresh ALL Deals

```

Key a "Z" to Zoom to Details:



Use **F6** to print the CLP Item Summary: (You must enter a Deal# to do this)

Creative Data Research-SUPPORT	CLP Item Summary	BARBARA	DCMVFFR	8/26/03 10:02:
Vendor Name	Deal #	Description	From	- To
000120 ADAMS & BROOKS INC	144	Test CLP		
** END OF REPORT **				

You can Refresh all deals by using **F22**, or key a Deal# and use **F10** to Refresh a specific Deal.