Eagle Loyalty Setup

Epicor Eagle Loyalty requires some planning to ensure that it is aligned with your business processes.

In this course, we will discuss various Options Configuration settings including those related to Credit Card Storage, the calculation of Trip Points, Loyalty Dollars, and the use of Dynamic Coupons.

Let's dig in.

Located in the Course Materials section you will find a complete list of Options and Security bits that should be reviewed prior to implementing a Loyalty program.

Following your purchase, Epicor's Licensing Department will enable any password protected options.

For assistance please contact them directly.

These protected Options include 1182, 9061, 9070, 9871, and 9811.

On Epicor Eagle Software Release Level 26 and higher, Options ID 9867 is also available.

These are kept on the System level, which means they apply to all Stores in a multi-store Eagle system.

There are several Loyalty Constants that must be set within Options Configuration.

Select System Management from your Eagle browser, then Options Configuration and then click the Options Configuration link.

You can also type OPTIONS or OPT in the Launch Bar.

Select 'Change Lookup' under the Ribbon menu.

From the Subsystems menu, select ALL.

Choose MLC Loyalty in the Options dropdown list.

Press Display, or F6.

Options ID 100 requires the entry of a Vendor Code.

You may enter any Vendor with a value in the 'Assigned Customer Number' Field.

We have set up the Vendor LOYAL specifically for use with the Loyalty Card program.

Options ID 130 identifies a default Coupon SKU.

Best Practice is to use CLC.

This is a SKU that must be setup in Inventory Maintenance.

Refer to the 'Dynamic Promotions' Epicor Learning Center Agenda for assistance with Coupon SKU setup.

And finally, Options ID 140, Point of Sale Link Window, determines when Eagle POS displays the pop-up window for Loyalty Number entry.

You can choose the beginning of the transaction, the end of the transaction or both the beginning and the end.

There are a few settings related to Credit Card Storage that will need to be reviewed.

This feature allows you to easily transfer rewards points onto a usable gift or credit card.

Set Options ID 3565, Keep Customer Credit Cards on System, to A, B or C depending on your business practice.

Set Options ID 9074, Check the Balance of Stored in-store Gift Card, to Yes.

The Eagle software will check for a gift card balance greater than zero and prompt the clerk to apply the balance to the sale.

The options related to Loyalty Trip Points require decisions on 'What', 'How', and 'When' to give Customers their Loyalty Rewards.

Options ID 9062 and 9069 determine which sales dollars qualify for Loyalty Points while 9063 through 9068 control the decision on how and when to give your customers loyalty rewards.

Sales Value to use for Trip Points calculation, Options ID 9062, allows points to be calculated using Sales Dollars, Cost Dollars, or Gross Profit Dollars.

Best Practice is to use Sales Dollars Period to Date as it's easiest for customers to understand.

Options ID 9063, Trip Points Multiplier, is used to calculate a point value.

The value entered here is multiplied against the dollar value in Options ID 9062.

For example, if the Sales Dollars Period to Date was $100 and the multiplier was one, the conversion would be 100 points or one point for every dollar spent.

 If you want customers to earn 1 point for every $2 spent, then the Multiplier would be .5.

1 point is now only equal to 50 cents.

You must spend 2 dollars to get one point.

Options ID 9065, Label to use for Trip Points, contains the Name of your custom Loyalty Program.

Options ID 9066, determines whether or not the customer's point balance will print on the bottom of their receipt.

Option ID 9067 and 9068 determine how many points a customer needs to earn Loyalty Dollars and the value of those Loyalty Dollars.

For example, if every time a customer earns 100 points you wish to reward them with five Loyalty dollars you would enter a value of 100 in ID 9067.

Then enter the number five in ID 9068.

This will create a reward in the amount of five Loyalty dollars every time they reach 100 points.

Remember to press Change to save your changes.

Options ID 9069 allows you to exclude certain departments from qualifying for Loyalty rewards.

Select Yes if you want to exclude a specific department.

The departments can be identified by a flag in MDE.

Finally, Option ID 3534 determines how many days of inactivity an account must have before Loyalty Dollars are purged.

Please note that if this amount is left at zero, all Loyalty Dollars will be zeroed-out, regardless of activity.

Once the Trip Point parameters have been set, a report called CALCPNT is scheduled to run to update each customer's Trip Points based on their sales.

To add this report, open Secure Access and sign on.

Type TMENU and press enter.

Type the letters CEQ and then press enter to begin creating the End-of-Day report Queue.

Enter the name of the Report Queue.

The Function Name is CALCPNT

Give the queue a description, such as 'Calculate Trip points'.

Click the Display button.

Set the correct Spooler channel.

Press Enter to move the cursor to the Calculate Period and year to date Trip Point field and enter a Y.

Press Add to add the queue.

A message displays confirming your entry.

With option 9069 set to Y, you will also need to queue an A/R Sales Analysis Report or RSA.

Type RSA in the launch bar and press Enter.

On the Print Setup Page, select Spooler Only as the Print to option.

On the Options page, select P and E.

Under Code Selection, enter the letter T in the 4th Account code position.

This is how Loyalty Accounts are identified within MCR.

Select Queue from the ribbon menu.

Select the LOYALTY queue from the drop down list and press 'OK'.

The report will run each evening.

A message will appear confirming your actions have been successful.

After calculating Trip Points, you can convert them into Loyalty Dollars.

This process transfers the amount to the Gift Card and allows it to be used as payment at Point of Sale.

Open the Gift Card Viewer by typing GCV in the Launch Bar.

Click the Miscellaneous button.

Select number 3, 'Run Loyalty Points Conversion'.

The report can be viewed in the Spooler as a GCC report.

Dynamic Coupons can print automatically at Point of Sale whenever the specified reward point threshold is met.

Set Options ID 9877 to the number of points needed to trigger a coupon to be issued.

Enter the Coupon ID in Options ID 9878

You can review the Dynamic Promotions Agenda for more detail on creating Dynamic Coupons.

Throughout this course you have seen to the process to configure your loyalty options and constants.

We discussed settings related to Credit Card Storage, the creation of Trip Points and the use of Dynamic Coupons.

You are now ready to begin adding customers to your Eagle Loyalty program.

Be sure to view all of the classes in the Epicor Eagle Loyalty Agenda.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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