

Create your own incentive programs that allow customers to earn reward points for each dollar spent. Customers can use accumulated points to purchase additional products. You have total control over the program, including which accounts are eligible, the ratio of dollars spent to points earned, and the point value of reward items. You can even set up multiple rewards programs, assigning different programs to different groups of customers.

New features unique to ECinteractive and is.D-Force2® include the ability to award points to individual users, even if they are not the final approver of the order, and the option to apply all of a customer's reward points to a single reward account.

When a program is set up for a whole customer account, that customer account will need an administrator to utilize the points. Please review both Point Rewards programs described below prior to setting up any program.

Setting Up Rewards Categories, Products, and Programs

Creating Rewards Categories

1. Under **Rewards**, select **Product Management**.
2. Click **Add new reward category**.
3. Specify the **Category** for the reward items. You can list as many categories as you want. These categories will appear when users access the **Rewards** page located under the **My Account** link on the top navigation bar.
4. Click **Insert**.

Creating Rewards Products

5. Click **Manage Rewards Products** to add your items
6. Click **Add new reward product**. Items listed DO NOT need to reside in your inventory.
 - Indicate **Point Value** for the rewards item.
 - Provide a **Name** for the item.
 - Designate which **Category** this item belongs to. Each category you created above should be available in the pull down menu.
 - Provide a **Description** of the rewards item.
 - Insert **Product and Thumbnail** image for the reward item.
 - Click **Insert Record**.
 - Continue to add items as necessary.

Creating Rewards Programs

7. Under Rewards, select Program Management.
8. Click **Manage Administrator**.
9. Provide contact information of the person at your location who will be responsible for managing the rewards program.
10. Click **Continue**.
11. Click **Add New Program**.
12. Click **Add New Program**.
13. Provide a **Name** for the rewards program.

14. Provide a **Ratio Value** (\$ to points).
15. In the **Type** pull down menu, choose the appropriate option:
 - **Customer** (select this option if you wish to make this program available to specific users regardless of their account number.)
 - **Account** (select this option if you wish only the user(s) identified as program administrators for an account to receive/redeem points for purchases made by any user within that account).
16. If you selected the Customer type of program, go to the section below called Setting Up a Customer-Type Rewards Program to setup or modify Marketing settings.
17. If you selected the **Account** type of program, set up a Program Administrator by following these steps:
 - Click on the **Edit Accounts to Account Based programs** link (the “pencil”).
 - Click on **Assign account and program administrators**.
 - Select the appropriate **Account** from the pull down menu. A list of users for the selected account will appear.
 - Highlight the **User(s)** that will receive/redeem points and move them to the Program Administrators area.
 - Click **Save**.
 - For more information, go to the section below called Setting Up an Account-Type Rewards Program.

Setting Up A Customer-Type Rewards Program

You can set up multiple rewards programs, assigning different programs to different groups of customers. Customer-type programs are available to specific users regardless of their account number. To create a Customer-Type Point Rewards program, follow these steps:

Specifying Rewards Categories & Products

1. If you have not yet done so, set up Rewards Categories, Products, and Programs as described above.

CustomerSettings – Marketing

To allow/deny users the benefit of the Point Rewards program, follow these steps:

2. Under **CustomerSettings**, select **Marketing**.
3. Create or modify a group to assign to users.
4. In the pull down menu of the **Rewards Program** setting, choose the appropriate option:
 - If you DO NOT want a user to benefit from the Point Rewards program, use the **No Rewards Program** option.
 - If you want users to benefit from the Point Rewards program, select the appropriate **Customer** type program.
5. To make the appropriate changes (if necessary) to users’ Marketing settings, go to the **CustomerAdmin** section and choose **Customer Management**.

What the User Sees

When a user is set up to be eligible for Customer-type rewards points, several changes occur:

- The user is notified of Reward Points earnings during **CheckOut**:
 - After a user finishes adding items to their cart and clicks the **CheckOut** button, the reward points earned is displayed in the **Order Summary**.
 - The points earned are again displayed after the user clicks **Place my Order**.
- When the user is logged in, they can go to the **Rewards** page from the **My Account** top navigation menu . The Rewards page gives the user the following options:
 - The **Transaction History** tab displays which invoices generated reward points. The list includes all orders that were placed by the rewards-eligible user.
 - The **Questions?** tab lets the user submit questions to the Point Rewards administrator at the dealer’s location.
 - The **Rewards Catalog** tab lets the user view total points available, reward items and items sorted by category or point value, and redeem points by following these steps:
 - a. When categories are displayed, the user can choose any item from any category.
 - b. To expand the category to view the items, click on the “+”.
 - c. Select desired item(s) from list and click **Continue**.
 - d. Complete the Rewards page and click **Continue**. The page updates the total points being redeemed and points remaining. The system emails a reward redemption notice to the Point Rewards Administrator at the dealer’s office.

Setting Up an Account-Type Rewards Program

You can award points to individual users, even if they are not the final approver of the order, and apply all of a customer’s reward points to a single reward account. Depending on the customer's preferences, access to an Account-type rewards account can be restricted to one or more authorized end users; other users may not even be aware of its existence.

For example, if there are 20 users set up within one customer account, only the user(s) identified as program administrators for this account will be able to receive/redeem points for purchases no matter who submitted the orders. To create Account-type rewards programs, follow these steps:

Specifying Rewards Categories, Products, and Program Administrator

1. If you have not yet done so, set up Rewards Categories, Products, and Program as described previously.

Note: Since the Account program administrator has been identified, there is no need to create/modify a Marketing group settings to enable the rewards program.

What the Non-Administrator Account User Sees

In the Account-type Rewards Program, if particular users are not identified as Administrator, they are not shown any Point Reward information. Only the user designated as the program administrator for the account will have access to point reward information.

Points are, however, calculated on their orders and available only to the program administrator for that customer account.

What the Rewards Program Administrator Account User Sees

When a user is set up as a Rewards Program Administrator and is logged in, they can go to the **Rewards** page from the **My Account** top navigation menu. The Rewards page gives the user the following options:

- The **Transaction History** tab lists invoices that generated reward points. The list includes all orders placed by any user within the rewards-eligible customer account.
- The **Questions?** tab lets the user submit questions to the Point Rewards administrator at the dealer's location.
- The **Rewards Catalog** tab lets you view total points available, reward items and items sorted by category or point value, and redeem points by following these steps:
 - a. When the categories are displayed, program administrators can choose any item from any category.
 - b. To expand the category to view the items, click on the “+” icon.
 - c. Select desired item(s) from list and click **Continue**.
 - d. Complete the Rewards page and click **Continue**. The page updates the total points being redeemed and points remaining. The system emails a reward redemption notice to the Point Rewards Administrator at the dealer's office.

Dealer Information

In the Admin Control Panel, the dealer can view rewards transaction history for account or customer programs by selecting **Rewards – Transaction History**.

In the future, this page will provides ability to credit or debit adjustments. We will announce when this enhancement is released. **DO NOT** try to make any adjustments until further notice.