



# Smart Launch

## Loyalty



### What is Smart Launch?

Whether you are new to CATAPULT® or an experienced user—we know you're eager to master every facet of the platform to grow your success. We also realize that folks have varied degrees of technical aptitude. Some choose to "go it alone" and take a DIY approach with new technologies, others prefer step-by-step guidance.

#### "Smart Launch" was developed for the latter group.

Smart Launch consultants can help you master different aspects of your CATAPULT technology stack as you plan out a series of near-term tangible goals. They'll also help you build out a framework for reaching long-term objectives.

Smart Launch programs are available for CATAPULT WebCart™ (ECommerce), **Loyalty solutions**, General Ledger (Accounting Solutions), Inventory Automation, and Briefcase™ (Reporting and Analytics functions).

### Program Outline for Loyalty

#### **Duration: Up to 20 hours of consultation and a minimum of three months of Success Navigator**

Program enables retailers to utilize CATAPULT's Loyalty Points and LoyaltyBot® functions at a master level. Program includes development of a rollout strategy, review of points accrual settings and customer rules, inventory setup, customer setup, store setup, review of reports available, POS training for cashiers, a review of possible LoyaltyBot campaign ideas, and a review of how to set up store coupons with Loyalty.



#### WHAT IS SUCCESS NAVIGATOR?

Our Success Navigator program provides you with guidance on maximizing retail successes so that you can sustainably grow your enterprise. Discover the freedom to innovate through ongoing strategic consultation and customized solutions. Our industry experts—retail veterans with decades of experience—will work with you to help get the most value out of CATAPULT® and every other dimension of your retail enterprise.

Here is what you can expect from the Smart Launch one-on-one consultation:

## Loyalty Points

- **Information Gathering:** You and your Smart Launch consultant will determine your expectations for the Smart Launch program. They will help you develop a rollout strategy and assist you in determining your short and long-term goals.
- **Points Review:** You'll determine methods available for customer points accrual, eligible items/groups, excluded items/groups, and point redemption settings.
- **Customer Rules and Setup:** You'll review the data currently on file for customers before reviewing the processes for setting up boarding profiles, and then the processes for boarding customers into CATAPULT's Loyalty configuration.
- **Inventory Setup:** You'll learn how to set up inventory configurations within CATAPULT Loyalty and how to apply item restrictions.
- **Store Setup:** You'll learn how to configure Store Multiplier and Loyalty Tender functions.
- **Reports:** You'll review and train on various reports available with Loyalty Points.
- **POS Training:** You'll receive cashier training with regards to Loyalty functions, setting up points on receipt, and setting up points on CID.

For more information or to sign up for this Smart Launch program, please contact the ECRS Customer Care team at 1-800-211-1172 option 1, or submit a support ticket via myECRS.

## LoyaltyBot

- **Introduction:** Your Smart Launch Consultant will help you to understand how LoyaltyBot works with Loyalty Points, and review possible campaign ideas.
- **Promotions:** You'll learn how to develop promotions that award points to customers for completing specific actions or making specific purchases.
- **Store Coupons:** You'll discover how to execute store coupons in conjunction with LoyaltyBot.
- **Campaigns:** During training, you'll review the following aspects with regard to campaigns:
  - Using LoyaltyBot with Loyalty Points
  - Event Based Rules
  - Transactional Rules
  - Punch Card Rewards
  - Expiration Rules
  - Campaign Manager Setup / Training
- **Reports:** You'll review and train on various reports available with LoyaltyBot.
- **POS Training:** You'll receive cashier training with regards to LoyaltyBot functions.

### WANT TO "DO-IT-YOURSELF" INSTEAD?

If you are interested in the "go it alone" approach, you can find resources pertinent to [Loyalty on CAT-U Online](#).

*The information provided in this document is for informational purposes only and is subject to change without notice. All information provided is known to be current at the time of publication. ECRS does not guarantee the correctness and completeness of the information provided on this document.*



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ECRS is a privately-held Retail Success Company driven by a desire to change the way retailers use technology in their operations. We use a value-focused, customer-centric approach to create success stories, not only through comprehensive, omnichannel POS technology, but also with our team of highly-experienced retail automation specialists who will help you extract the maximum value from your investment.

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