



DPN RETAILER SHOPPER CARE (CUSTOMER SERVICE TOOL) MANAGEMENT USING INCENTIVES MANAGER

v 1.3 March 2024



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WHAT IS SHOPPER CARE (CUSTOMER SERVICE TOOL)?

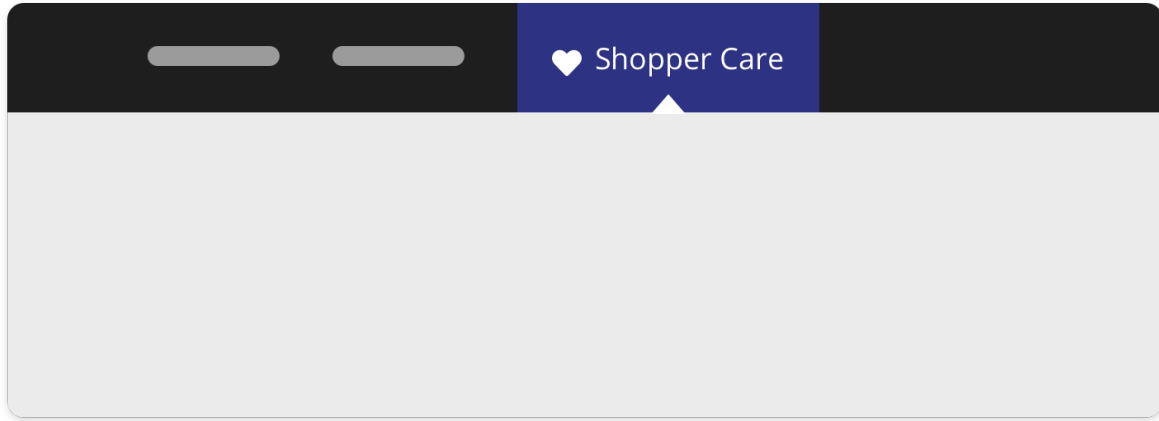
The Shopper Care (Customer Service Tool) feature gives you visibility into shopper accounts to help troubleshoot and resolve problems related to clipping and/or redeeming digital coupons, cash back offers and loyalty offers. Shopper Care (Customer Service Tool) provides insight into shopper activity and the ability to view available offers for the shopper. Additionally, you can take actions on offers, including manually clipping offers for shoppers.

ACCESSING INMAR INCENTIVES MANAGER

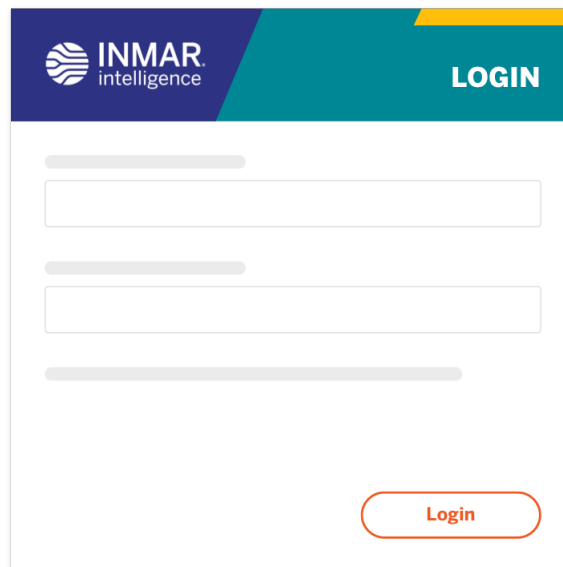
To begin, you'll need to log in using the URL, username, and password that was provided to you by the Implementation team. Please create your own password.

CONDUCTING A SEARCH

To conduct a customer search, select Shopper Care from the Menu Bar in Incentives Manager.

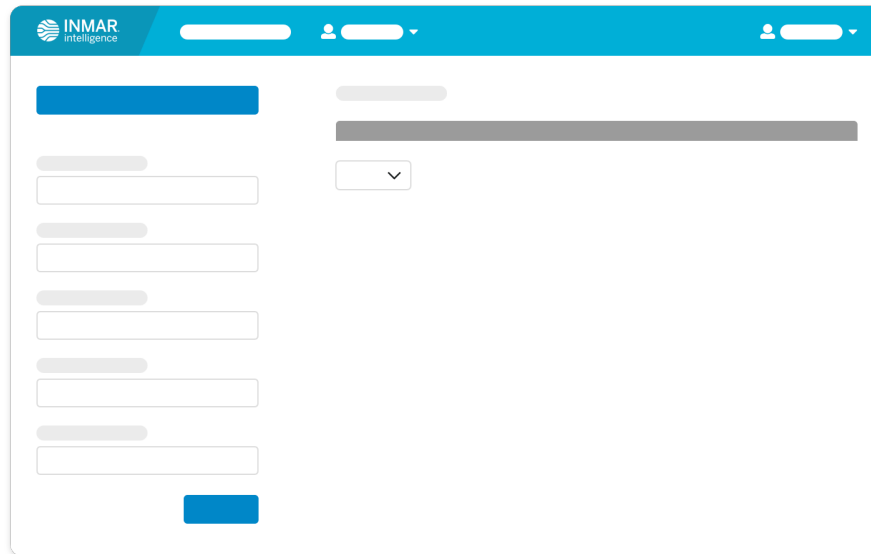


As a DPN Retailer, you will be directed to DPN Customer Service Tool. Log in to the site with provided credentials. For first time users, your user name is your email address and you will need to complete a password reset to set your password for future use.

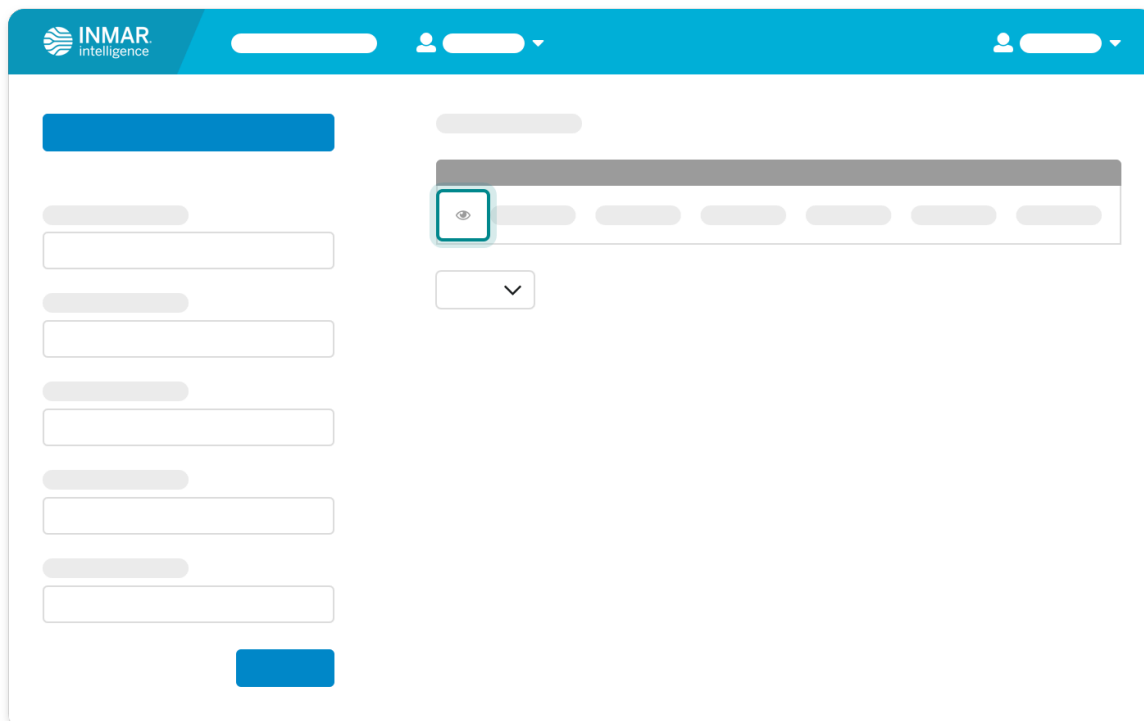

 A screenshot of a login page. The header is split into a dark blue section on the left with the 'INMAR intelligence' logo, and a teal section on the right with the word 'LOGIN' in white. Below the header is a white form area. It contains three input fields: the first is a short text field, the second is a longer text field, and the third is another short text field. At the bottom right of the form is a rounded rectangular button with an orange border and the word 'Login' in orange text.

To access the Customer Service Tool directly, use this URL: <https://customer-service.dpn.inmar.com>

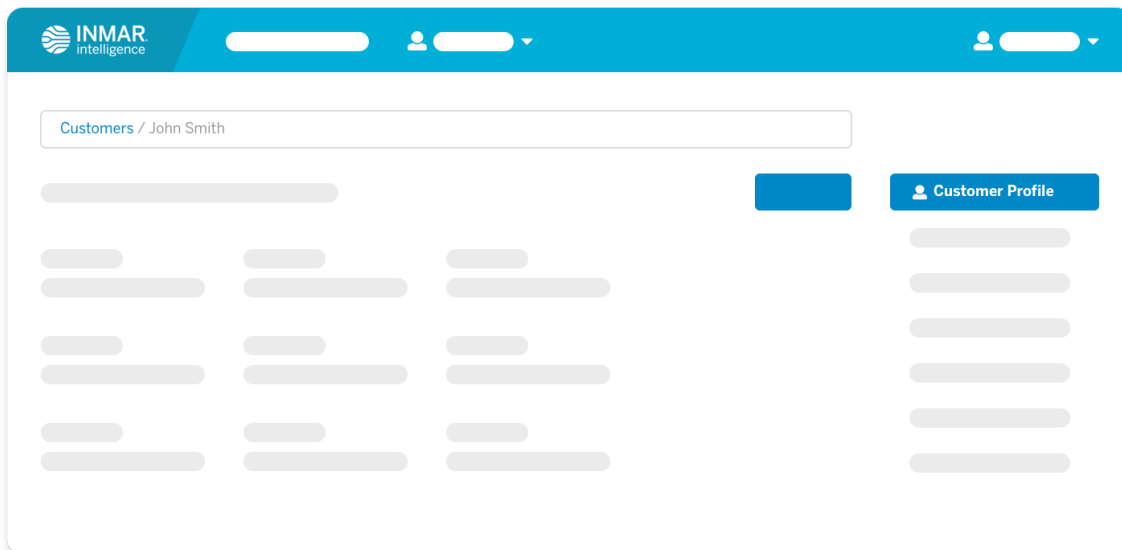
To search for a shopper, enter the appropriate search criteria, such as loyalty card number, email address, first name, last name or phone number associated with the account in the Customer Search fields on the left hand side and click SEARCH or press ENTER.



Once you've conducted a search for a shopper, select a record (if more than one is present) by clicking on the eye icon.



This will display the customer details for the shopper selected.



Shopper ID Information is listed below. Some values may or may not be applicable depending on the retailer's implementation:

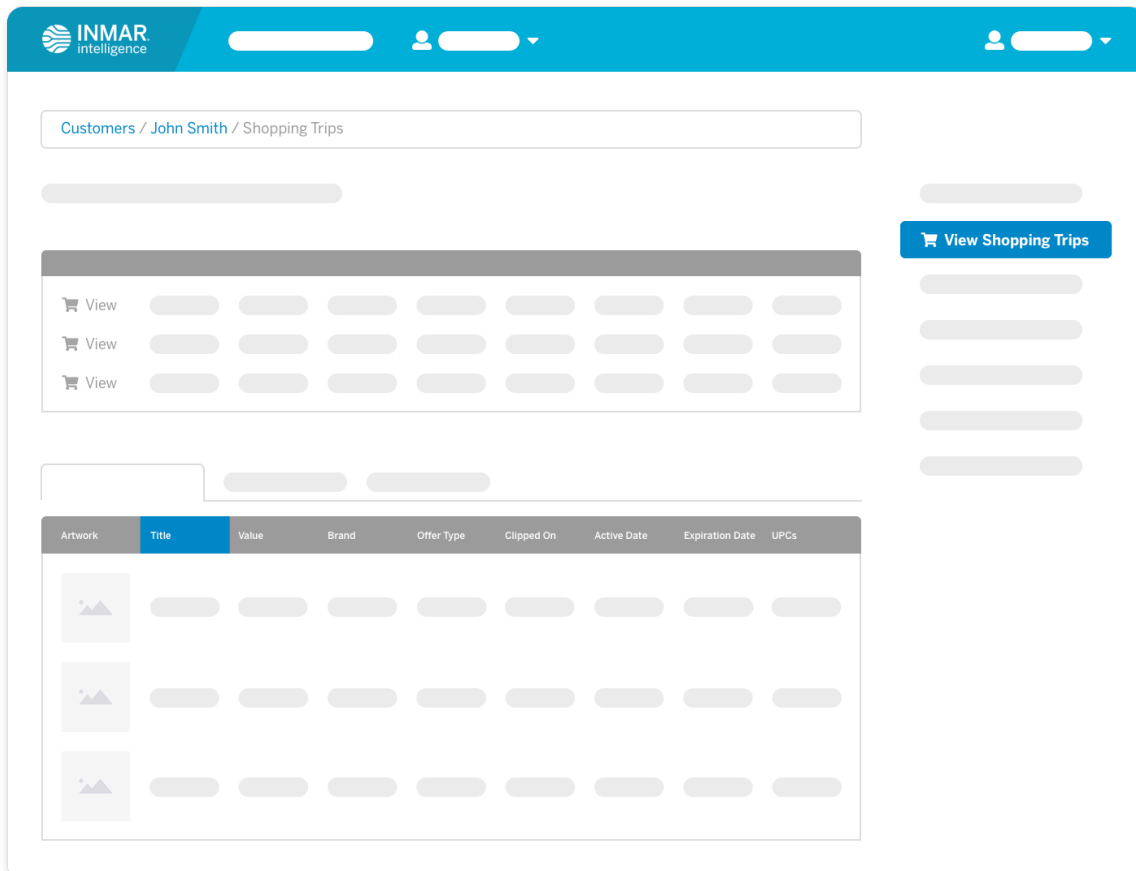
- Registration Status, if registered, will provide date/time
- Loyalty Card Number*
- Alternate Loyalty ID*
- Email Address associated with account
- First/Last Name*
- Primary/Alternate Phone*
- Birthdate*
- Address/City/State/Zip*
- Primary or Home Stores
- Charity*
- Retailer-defined shopper metadata fields, for example opt-ins and preferences*

* If Applicable

VIEW SHOPPING TRIPS

View Shopping Trips provides a view of basket, or trip, summaries as well as a view of offer details. Shopping Trips summarizes the transactions, showing the following fields:

- **Transaction ID** - ID associated with the individual transaction
- **Date** - Date of the transaction
- **Time** - Time of the transaction
- **Store** - Store in which the transaction took place
- **Lane** - POS lane of the transaction
- **Items Purchased** - Count of total items purchased
- **Incentive Count** - Count of total incentives that played within the transaction
- **Total** - Total amount the shopper paid for the transaction
- **Status** - Transaction status provided by the retailer
 - **Canceled:** The transaction was canceled by the retailer.
 - **Finalized:** The transaction was completed by the retailer and Inmar has completed processing this basket. Redemptions may require validation.
 - **Opened:** The transaction has not yet been finalized by the retailer. This can happen after the transaction has occurred as finalization may come through tlog validation.
 - **Recalled:** The transaction has been suspended, was resumed and is now recalled.
 - **Suspended:** Inmar has not received a finalize call for this transaction. This could be due to a technical issue, or it could mean that the transaction was canceled and never completed. Shopper should provide proof of completed transactions, if required. *NOTE: Suspended transactions do not earn loyalty points.*
 - **Voided:** The transaction was voided by the retailer.



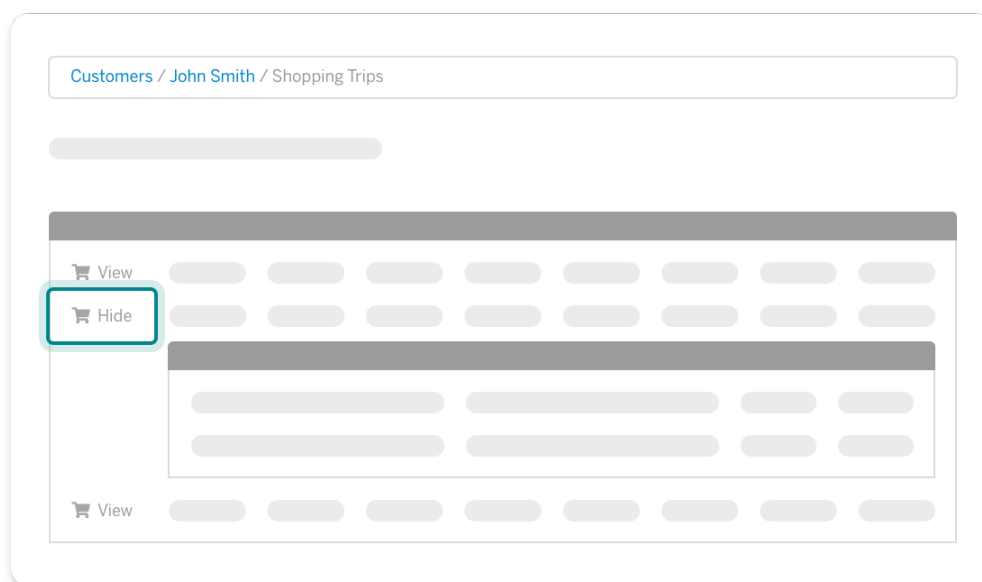
The screenshot displays the 'View Shopping Trips' interface within the INMAR intelligence system. At the top, there is a blue header with the INMAR intelligence logo and user profile icons. Below the header, a breadcrumb trail indicates the path: 'Customers / John Smith / Shopping Trips'. A 'View Shopping Trips' button is visible on the right side. The main content area features a table with transaction data. The table has columns for Artwork, Title, Value, Brand, Offer Type, Clipped On, Active Date, Expiration Date, and UPCs. The first three rows of the table are visible, each showing a transaction with a placeholder image for the artwork and various data points in the other columns.

Artwork	Title	Value	Brand	Offer Type	Clipped On	Active Date	Expiration Date	UPCs

Expanding a Shopping Trip

By clicking on the Shopping Cart View Icon, you will expand the shopping trip entry to reveal the customer's full shopping trip. Shopping trip details that are available include the following:

- **Product UPC** - The UPC purchased or the coupon number that played in the transaction
- **Description** - The UPC purchased or the coupon number that played in the transaction
- **Quantity** - Number of items purchased or offers redeemed
- **Amount** - Price paid for the item or the incentive value

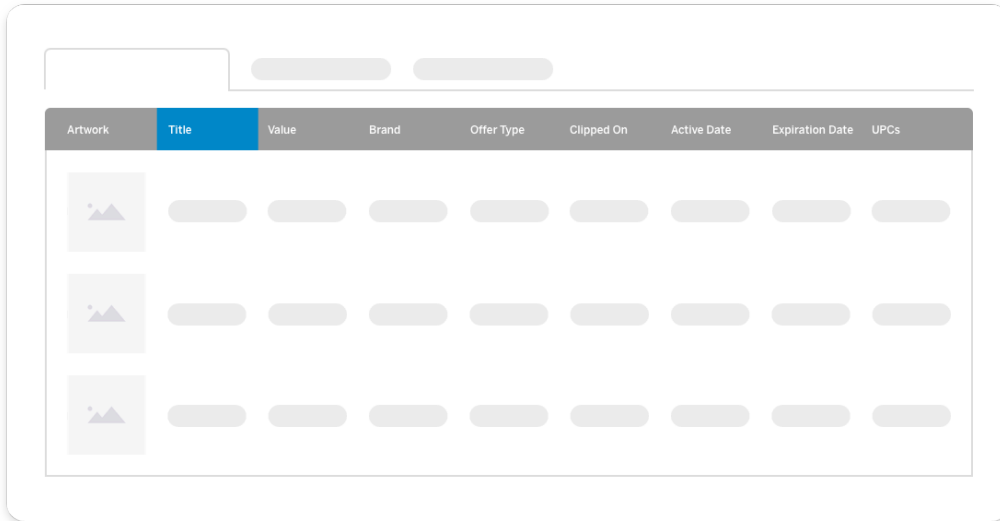





Please Note: If additional assistance is needed to research a transaction, please provide all of the details from the right of the shopping cart icon in the shopping trips summary section to your Inmar contact.

Offer Table and Details

Incentive details are summarized in a table below the shopping trips within the View Shopping Trips section for each customer. Offers are grouped in the tables by status/type. Hover over the column name for sort options:

- **Clipped Offers** - Shows all offers the customer currently has clipped to their account/card that can be redeemed.
- **Earned Cash Back Offers** - Shows all cash back offers the customer has earned in the last 90 days.
- **Redeemed Offers** - Shows all offers the customer has redeemed in store in the last 90 days
- **Expired Offers** - Shows all offers that were clipped to the card but expired in the last 90 days and were not redeemed in store



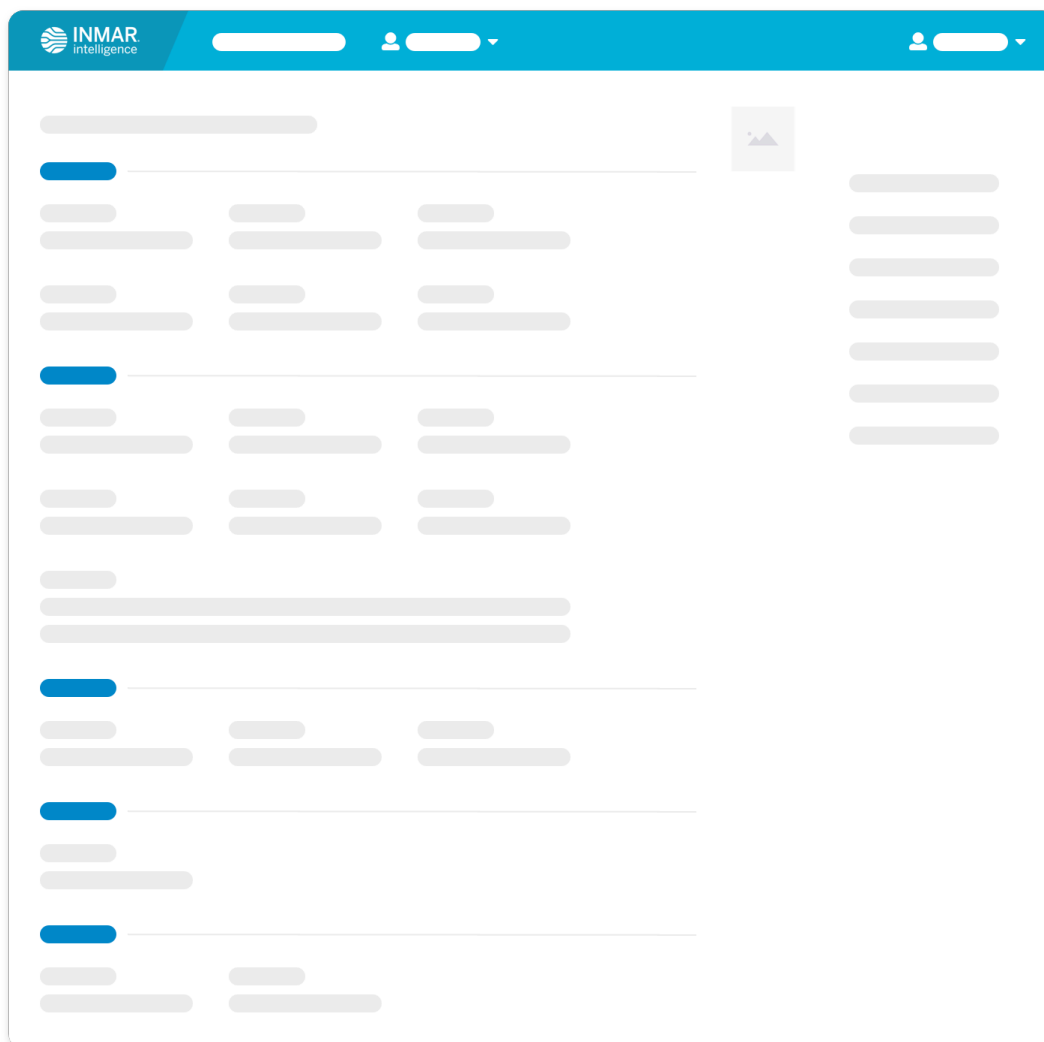
Artwork	Title	Value	Brand	Offer Type	Clipped On	Active Date	Expiration Date	UPCs
								
								
								

Expanding an offer

By clicking on an offer Title, you will expand the entry to reveal more detailed information about the offer. Offer data that is available in an expanded offer includes the following:

- Status
 - Issuer Status
 - Active for Clipping
 - Issuer
 - Retailer Status
 - Active for Redemption
- Setup
 - Offer Type (e.g., “Dollars Off Basket,” “Dollars Off Item,” etc.)
 - Offer Code
 - Alternate Offer Code
 - Inmar ID or Retailer Offer ID
 - Allow Consumer Clip
 - Stacking Allowed
 - Redemption Gating
 - Redemption Channel
- Create
 - Value Type
 - Face Value
 - Household Limit
 - Purchase Requirement
 - Reward Quantity
 - Number of Redemptions
 - Title/Short Description
 - Offer Description
 - Category
 - Brand
 - Terms
 - Retailer Tags

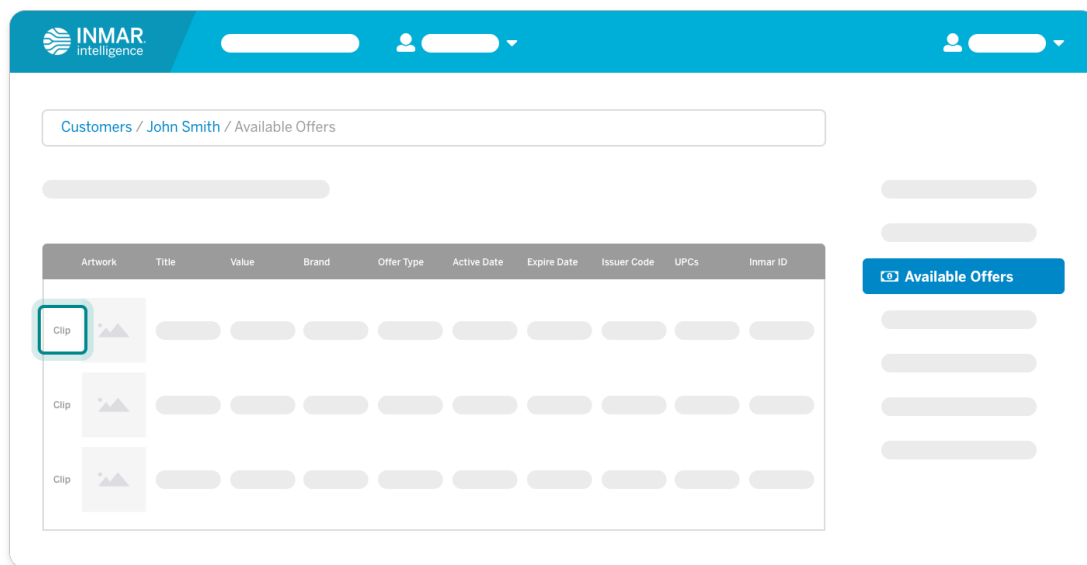
- Timing
 - Publish Start Date
 - Publish End Date
 - Expiration Date
- Geo Targeting - if applicable
 - Enforce restrictions at display
 - Enforce restrictions at redemption
 - Restrict Offer store details if applicable
- UPCs
 - Trigger UPCs
- Budget
 - Funding Type
 - Maximum Clip Volume



AVAILABLE OFFERS

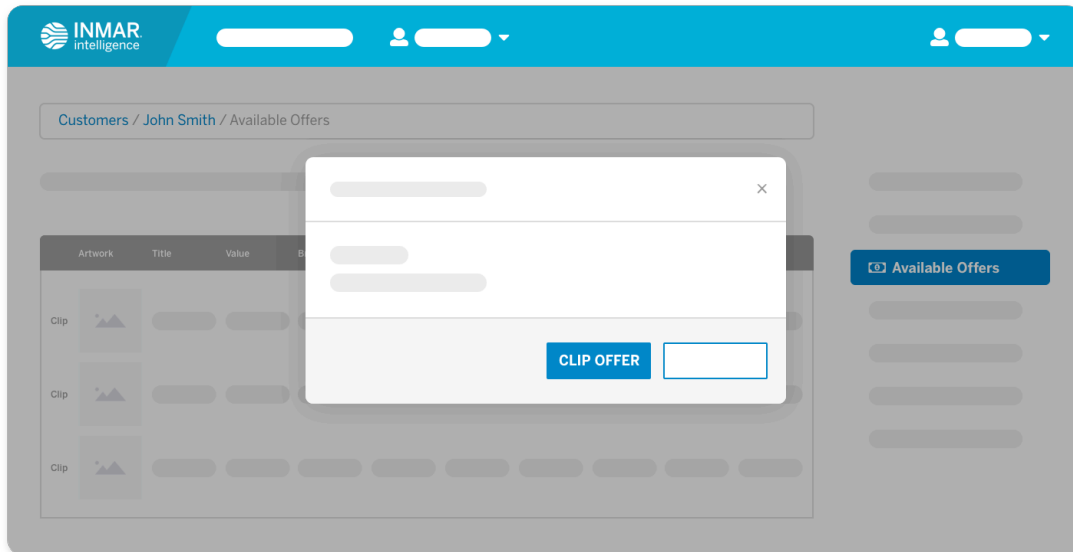
You can view the offers that are available for the customer to clip to their card in the Available Offers section. Offers in this section can be clipped to the customer's card by clicking on the "Clip Coupon" link for a discount offer or the "Clip Cashback" link for a cash back offer next to the offer Artwork. Key data in this view:

- Clip Link*
- Artwork - shows the coupon image
- Title - provides a short description of the offer
- Value
- Brand
- Offer Type
- Active Date - the first day that the offer can be redeemed
- Expire Date - the last day that the offer can be redeemed
- Issuer Code
- UPCs - items participating on the offer
- Inmar ID or Retailer Offer ID
- Redemption Channel



* Some offers may be available in both a discount and cashback option. For these offers, the Clip Link will display both "Clip Coupon" and "Clip Cashback". The service agent will need to understand from the customer what version of the offer to clip to the account if necessary. Only one version of the offer can be clipped to the account.

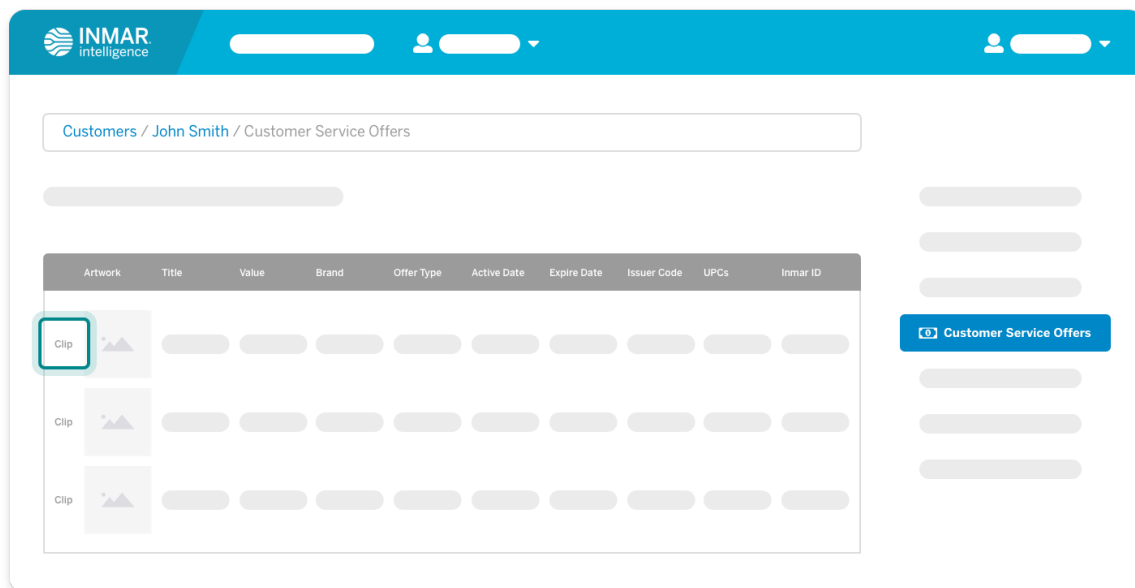
If clipping an offer to the customer's card, you will be presented with a confirmation message. To continue with the clip, select CLIP OFFER:



CUSTOMER SERVICE OFFERS

You can view the offers that are available to clip to the customer's account for customer services purposes within the Customer Service Offers section. These offers can be clipped to the customer's card by clicking on the "Clip Coupon" link next to the offer Artwork. Key data in this view:

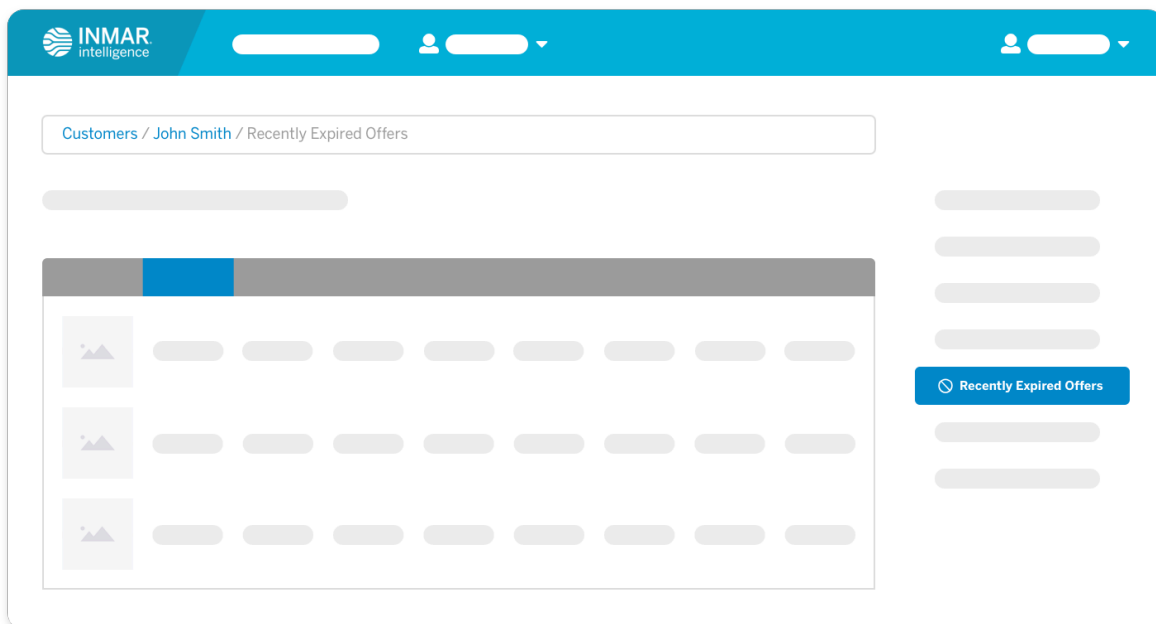
- Clip Link
- Artwork - shows the coupon image
- Title - provides a short description of the offer
- Value
- Brand
- Offer Type
- Active Date - the first day that the offer can be redeemed
- Expire Date - the last day that the offer can be redeemed
- Issuer Code
- UPCs - items participating on the offer
- Inmar ID or Retailer Offer ID
- Redemption Channel



RECENTLY EXPIRED

You can view expired offers from the retailer level in the Recently Expired section. Offers in this section are not specific to the customer record, but cover all recently expired offers for the retailer. They are sorted by the most recently expired at the top, but can be sorted by Title, Value, Brand, Active Date or Expire Date by clicking on the column name. Key data in this view:

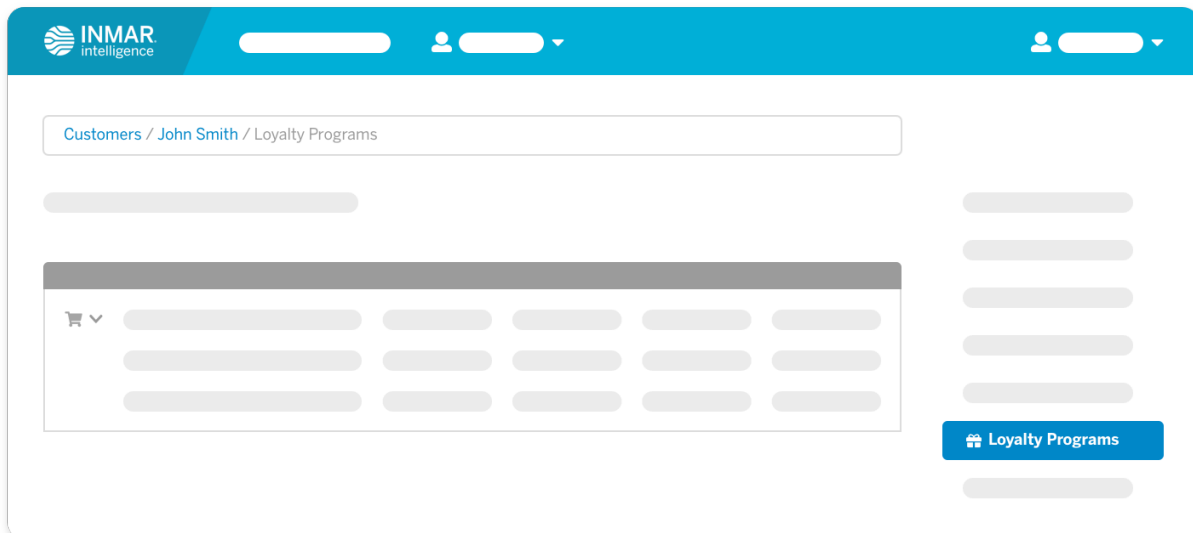
- Artwork - shows the coupon image
- Title - provides a short description of the offer
- Value
- Brand
- Offer Type
- Active Date - the first day that the offer can be redeemed
- Expire Date - the last day that the offer can be redeemed
- Issuer Code
- UPCs - items participating on the offer
- Inmar ID or Retailer Offer ID



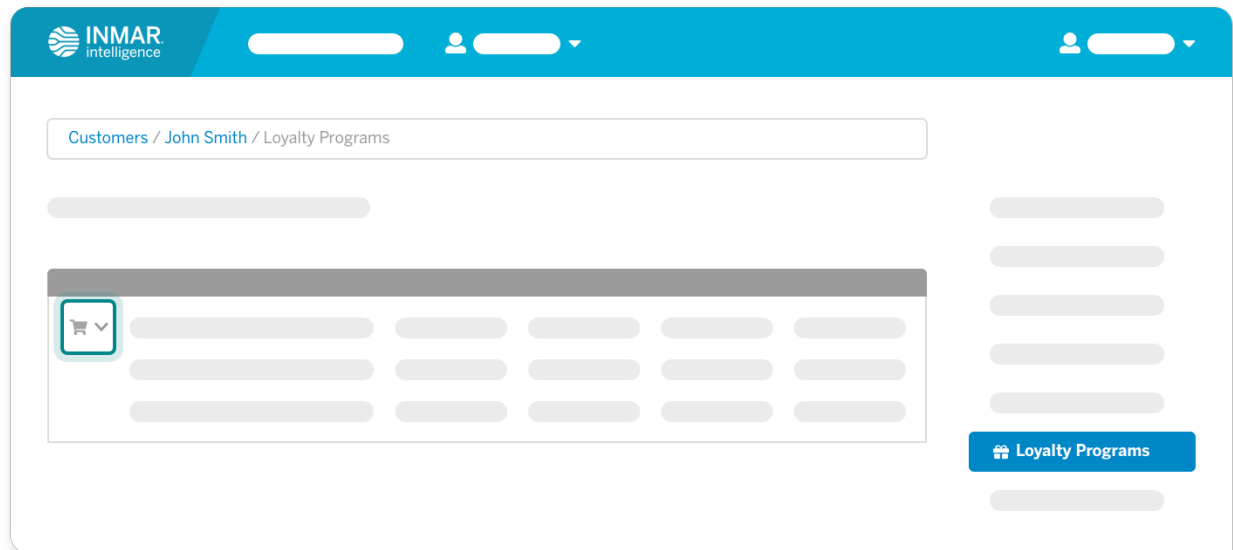
LOYALTY PROGRAMS

You can view all active loyalty programs for the customer in the Loyalty Programs view. Programs that are available for the customer to opt into or programs that have already clipped to their account are available in this view. "Loyalty" must be enabled in the retailer settings to view this section. Key Data in this View:

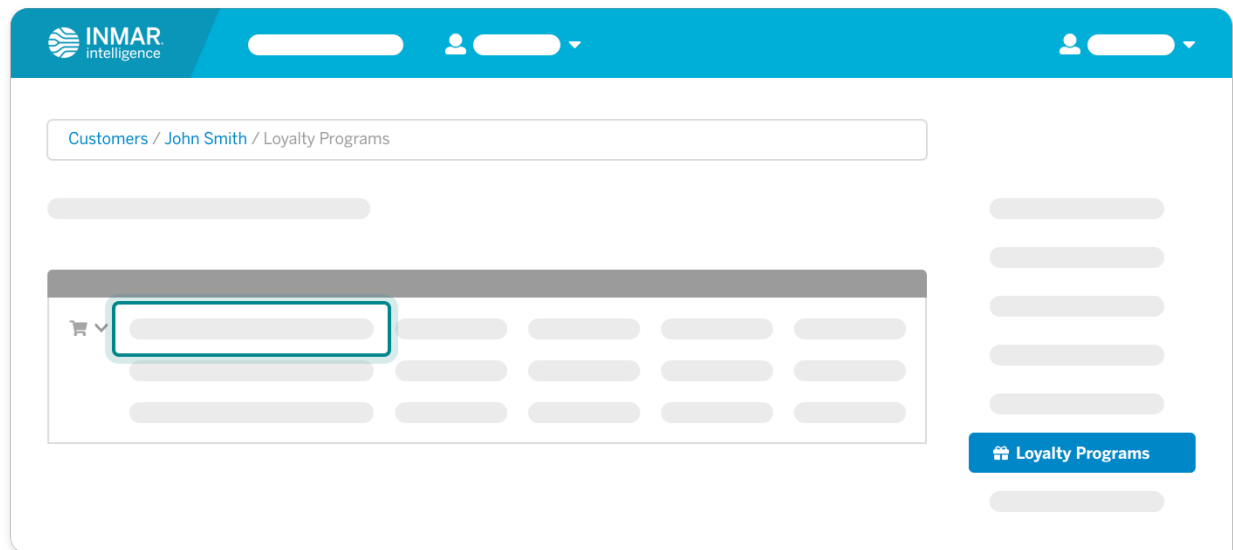
- **Name** - Loyalty Program Name
- **Dates** - Dates the program is active for earning points and redeeming rewards
- **Status** - Shows the customer's current status in the program
 - Available - Customer has not opted in, but program is available to the customer to clip
 - Clipped - Customer has opted into the program and clipped the qualifier offer
 - Redeemed - Customer has earned at least one reward and there is nothing left to do
 - Unavailable - Customer has not earned rewards and there is nothing left to do.
- **Opt-In Date** - Date the customer enrolled in the program, either by clipping a qualifier or enrolled automatically
- **Visible** - Indicates if the program would be visible in the shopper's wallet or on a retailer's website.
- **Points** - The current point balance for the program
- **Action** - Options available to the customer service agent
 - Opt In - Will clip all qualifying offers associated with the loyalty program to the customer account
 - Adjust Points - Allows the customer service agent the option to add or remove points from a selected loyalty program



Clicking on the Shopping Cart Icon next to a Loyalty Program will expand the selection to view customer activity in the program.

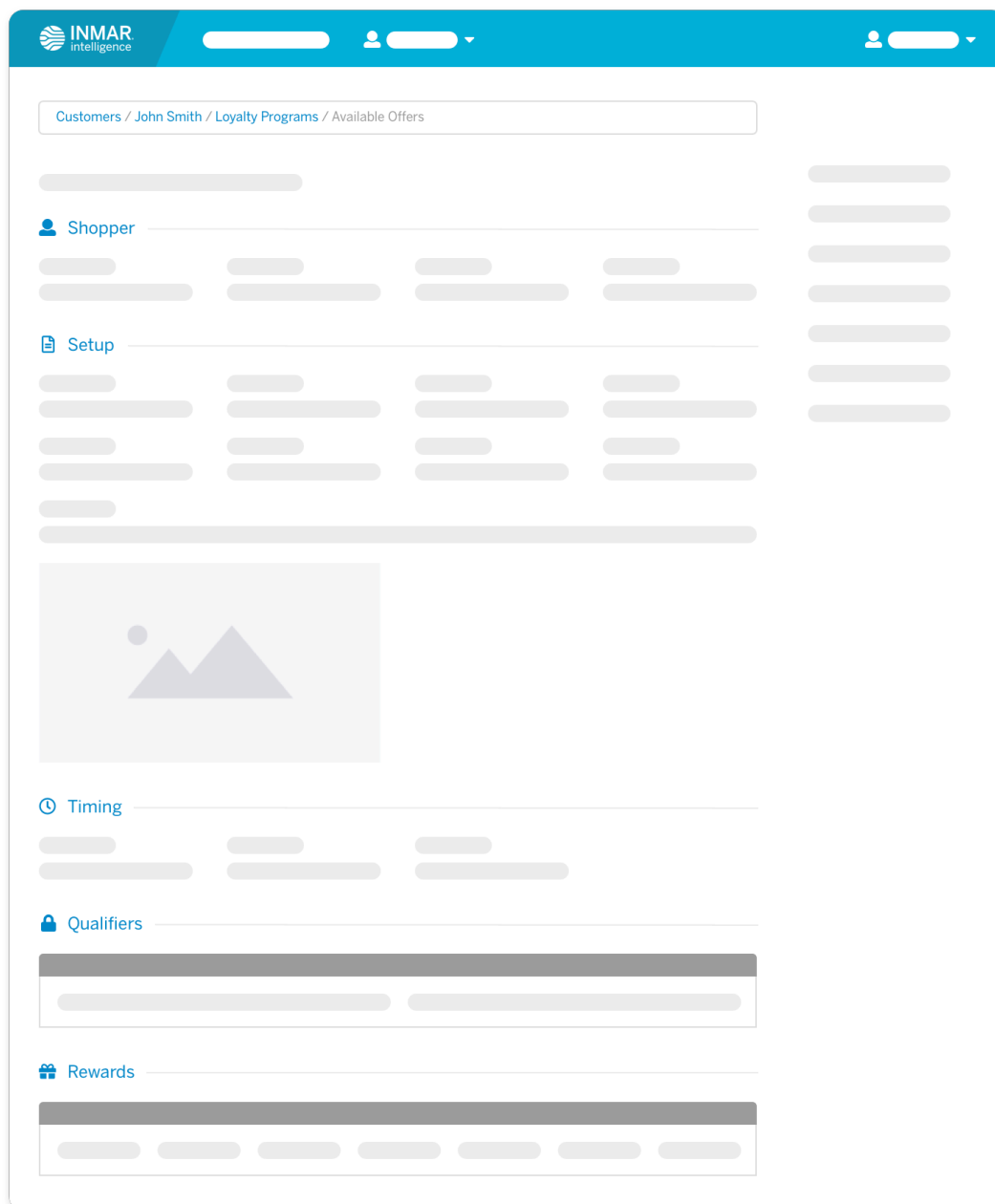


Clicking on a Loyalty Program Name will show the details of the program.



The program detail page shows all of the details of the loyalty program as well as the offers that are part of it. Programs can be opted in or points can be adjusted from this view as well under Actions. The shopper point balance is shown at the top of the page. Key data in this section:

- Shopper - Details program balance, status and opt-in option if available.
- Setup - Includes setup details of the loyalty program
- Timing - Effective dates of the loyalty program
- Qualifiers - Details qualifier (s) offers that earn customer points
- Rewards - Shows each reward group and the status for the shopper



Customers / John Smith / Loyalty Programs / Available Offers

Shopper


Setup

Timing

Qualifiers

Rewards

The Rewards section will indicate the status of the reward group, the number of times the customer has unlocked the group under Target Achieved, the number of times the customer has redeemed the reward under Target Redeemed and the details of the reward group including the incentive ID(s) associated with each group.

 **Rewards**

Reward Groups

Points Threshold: 100

Points Threshold: 200

Points Threshold: 300

LOYALTY ACTIVITY

Loyalty Activity shows recent shopper activity across all loyalty programs. This includes earning points and redeeming/clipping rewards. All columns are sortable. Key data in this section:

- Program - Loyalty program ID (with link to active program) and link to view program activity
- Source - the source of the record. Options are:
 - Shopping Trip (links to basket)
 - Program Earned
 - Program Rewarded
 - Program Engaged
 - Consumer Donation
 - Customer Service Points Adjustment
 - Points Used
 - Consumer Event - (Event Name)
 - Payout Account (Cash Back only)
 - Payout Returned (Cash Back only)
 - Loyalty Consumer Payout (Cash Back only)
 - Other
- Source ID - the ID of the source that triggered the record. Options are: transaction
 - Basket <ID> (link to basket)
 - Unlocked Reward
 - Earned <program id> (link to program details)
 - Unlocked <program id> (link to program details)
 - Engaged <program id> (link to program details)
 - Qualifier <offer id> (link to offer details)
 - Unlocked <offer id> (link to offer details)
 - Engaged <offer id> (link to offer details)
 - Reward <offer id> Clipped (link to offer details)
 - Cash out Activity ID <activity id>
 - Points Earned - Qualifier Offer <offer id> (link to offer details)
- Points - the number of points earned in the program during a transaction (shopping trip) or via an action by CSVC to adjust points. Negative numbers are the points decremented, either via a reward clip for programs set to "Decrement on Reward" or a CSVC to adjust points.
- Balance - Points balance after the transaction
- Date - Date of the transaction

Loyalty Activity