

## [Slide 1] Introduction & Agenda

Welcome to Annex Cloud Academy. In the next few minutes, I will take you through a general overview of the Incentive Engine module within the Annex Cloud Loyalty Experience Platform.

[Slide 2] By the end of this course, you will be able to:

1. [Click] Understand what the Incentive Engine is at Annex Cloud.
2. [Click] Describe the value of leveraging benefits from the Incentive Engine.
3. [Click] Configure codes in the Incentive Engine.

## [Slide 3] What is the Incentive Engine?

[Slide 4] The Incentive Engine is a code, or voucher creation and management solution. [Click] The Incentive Engine offers an automated experience where Annex Cloud will generate a list of codes based on criteria set by the program administrator. [Slide 5] These codes can be linked to your [Click] preconfigured Loyalty or Refer-a-Friend rewards like discounts and free products, or they can be used for [Click] gift cards or store credit. The use of the codes is decided upon configuration, which you'll see in the next portion of our lesson. Whether you employ a loyalty strategy or not, you can quickly and easily configure, manage, associate, and distribute rewards with the Incentive Engine.

[Slide 6] The Incentive Engine is particularly impactful for omni-channel organizations that often find challenges in integrating different systems. We often hear how vouchers or gift cards generated by the point-of-sale (POS) don't work in e-commerce and vice versa. Annex Cloud's Incentive Engine offers a solution. [Click] It is an efficient way to manage omni-channel promotions and distribution, ensuring that members can redeem their offers—such as gift cards, vouchers, coupons—either partially or in full, anywhere they choose.

[Slide 7] Annex Cloud's Incentive Engine seamlessly connects e-commerce and point-of-sale systems to create a holistic viewpoint of your member data without interrupting the buyer journey, whether it be at a brick-and-mortar store or online.

Head to the next portion of our lesson to see how to configure codes and benefits in the Incentive Engine!

## [Slide 8] Incentive Engine Configuration

### *Groups*

[Slide 9] In the Annex Cloud platform, ensure you are on the [Click] 'Products' tab on the admin dashboard. At the bottom of the page, nestled in the [Click] 'Program Types' window, is the Incentive Engine module. Click [Click] 'Go' to navigate to the Incentive Engine dashboard.

[Slide 10] You are defaulted to the [Click] 'Groups' tab within the Incentive Engine dashboard. On the lefthand side of the screen, you will see four selectable tabs: [Click] Groups, Codes, Member Dashboard, and Additional Settings. On the 'Groups' screen, there is a large table divided into two sections: [Click] 'Group Details' and [Click] 'Code Details.'

In the 'Group Details' section, you see several columns with different labels relating to existing groups. In the [\[Click\]](#) Group ID section, you will see columns for the [\[Click\]](#) names of the groups, their associated identification numbers, [\[Click\]](#) what kind of group and its redemption type, [\[Click\]](#) group benefit types, [\[Click\]](#) the type of user, [\[Click\]](#) source, and [\[Click\]](#) start and expiration dates. In the 'Code Details' section, you can see [\[Click\]](#) how many codes are currently being used, [\[Click\]](#) how many are disabled, [\[Click\]](#) assigned, unassigned, and a [\[Click\]](#) total code count. To create a new group, [\[Click\]](#) click the 'Create Group' in the top right corner of the screen.

**[Slide 11]** You are taken to the 'Create Group' screen. First, you must choose whether your [\[Click\]](#) group is 'Fixed' or 'Dynamic.' Selecting the [\[Click\]](#) 'Fixed' option means that the benefits and/or code values are the same (static) across the group, while the [\[Click\]](#) 'Dynamic' option means the code values and benefits are undefined at the start but can be updated or defined at any time. Next, there is the [\[Click\]](#) 'Group Name' field where you can input a name for the new group. In the required [\[Click\]](#) 'Redemption Type' drop-down list, you must select either 'Full' or 'Partial' as the redemption type. The [\[Click\]](#) 'Full' option means that once a code is redeemed, even if not for the full amount of the code, the code cannot be used again. The [\[Click\]](#) 'Partial' option, however, allows a code to be reused if the total amount isn't fully redeemed on the first use. For example, if you have a code benefit worth twenty dollars, and you use ten dollars of the code, the 'Partial' option ensures you can reuse the code at another time and redeem the remaining ten dollars of the code. It is important to note that choosing either 'Full' or 'Partial' alters the remaining fields and the selectable options in some of the required drop-down lists.

#### *Full Redemption Type*

**[Slide 12]** If you select the [\[Click\]](#) 'Full' option in the 'Redemption Type' drop-down, the next displayed field is [\[Click\]](#) 'Code Redemption Limit. This field lets you determine how many times a code is redeemable by the member. Note that if you select 'Fixed' as the group type, you can choose to manually input a numerical value as the limit, or you can check the 'Unlimited' checkbox to remove the redemption limit entirely. **[Slide 13]** If you select [\[Click\]](#) 'Dynamic' as your group type, [\[Click\]](#) this field defaults to a numerical value of "1" and cannot be changed. In the required [\[Click\]](#) 'Benefits' field, you can choose several options from a [\[Click\]](#) drop-down list. **[Slide 14]** [\[Click\]](#) The 'Discount Amount' option applies a [\[Click\]](#) set amount to the code as a discount, i.e., \$20. The [\[Click\]](#) 'Discount Percentage' option applies a set percentage value to the code, i.e., 25%. You can also control the maximum discounted amount a member can receive in the 'Maximum Amount' field. For example, if you input one hundred (100) as the numerical value, the member receives a maximum of one-hundred dollars as a discount, even if the discount percentage is greater than one-hundred dollars.

The [\[Click\]](#) 'Free Product' benefit type awards the member with a free product, depending on which product SKU is uploaded to the 'Product SKU' field. The [\[Click\]](#) 'Product Discount Amount' option lets you award a member a discount on a defined product, i.e., twenty dollars. You define the product discount eligibility by uploading a product SKU in the 'Product SKU' field. Finally, the [\[Click\]](#) 'Product Discount Percentage' option lets you define specific products eligible for a discount with a product SKU and set an applicable discount percentage to those selected products. There is also a 'Maximum

Amount' field, which lets you configure the maximum discounted value a member receives when they purchase a specified product.

### *Partial Redemption Type*

**[Slide 15]** If you select the **[Click]** 'Partial' option in the 'Redemption Type' drop-down, the next displayed field is **[Click]** 'Partial Type.' You can select either 'Store Credit' or 'Gift Card' depending on which reward type you would like to offer your members. **[Slide 16]** If you select **[Click]** 'Store Credit,' you can input a **[Click]** numerical value so members can redeem their credit points in the form of discounts during their future purchases. Code issuers, general store owners, and administrators can create a code and assign a specific value to it. When the member places a new order, store credit is applied when making the purchase. **[Slide 17]** The **[Click]** 'Gift Card' option allows clients to sell digital gift cards on their platform. Annex Cloud gift cards are a form of prepaid debit cards that contain specific amounts of money available for a variety of purchases on client websites. Gift cards are redeemable only for purchases and cannot be cashed out. In the **[Click]** 'Custom Deduction' field, you can configure if you want the gift card to devalue by a set amount over a specified period. In the **[Click]** 'Devaluate' field, input a numerical value and then select 'Percentage' or 'Direct Amount' to determine the deduction type. You can also select when the devaluation occurs by setting its frequency in **[Click]** days, months, or years. Lastly, you can set the duration of consecutive **[Click]** deductions that are also done in days, months, or years.

In the **[Click]** 'Date Range' section, you can determine the date range for your code, which lets you set a period for when the code is eligible for redemption. Note that if you are editing the group prior to the beginning of the date range, you can edit the start date and time. Once you are past the set date, it can no longer be changed. With the end date range, as long as the set time does not expire, the range can be extended for as long as necessary. **[Slide 18]** In the **[Click]** 'Currency' field, select the applicable currency type from the drop-down list. In the **[Click]** 'Code Type' field, you can choose two options: 'Private' and 'Public.' The **[Click]** 'Private' option means that the code generated is designated for an assigned member, which means only that specified member is eligible to redeem the code. The **[Click]** 'Public' option means that a code is generated for anyone and can be redeemed without restriction. The **[Click]** 'Low Code Alert Count' lets you set a target value that notifies an admin when the remaining total code count reaches a low value. **[Click]** You can configure which admin receives the notification of the low code number by inputting an email address in the 'Alert Sent To' field. In the required **[Click]** 'Users' field, you can select your users to be 'Predefined Users' or 'Dynamic Users.' The **[Click]** 'Dynamic Users' option means the users are assigned at any time. If the code group is created now, this option lets you assign code groups down the road. The **[Click]** 'Predefined Users' option, however, requires a file of the specified users to be uploaded. Next is the **[Click]** 'Linked To' field, which lets you select an already integrated reward program from a drop-down list: Loyalty or Refer a Friend (RAF). Lastly, in the **[Click]** 'Source' field you can manually enter the functionality for which rewards are awarded for a group.

Once all the fields are completed, **[Click]** click 'Create Group' at the bottom of the screen. **[Slide 19]** Congratulations! You have successfully created a group. On the 'Congratulations'

popup window, [\[Click\]](#) click ‘Add Codes’ to continue to the next section of Incentive Engine training.

**[Slide 20]** You are defaulted to the ‘Add Incentive Codes’ screen. First, you can choose whether to [\[Click\]](#) create new codes or [\[Click\]](#) upload existing codes. With the ‘Upload Codes’ option, you must upload a file in the [\[Click\]](#) ‘File Upload’ field with the applicable codes in a CSV format. **[Slide 21]** The [\[Click\]](#) ‘Create Codes’ option lets you generate new codes for your group. You can set the number of created codes by entering a numerical value in the [\[Click\]](#) ‘Number of Codes’ field. For example, if you want to generate 10,000 codes, input *10000*. In the [\[Click\]](#) ‘Code Length’ field, you can configure how long your codes are, meaning how many characters comprise a single code. If you input a value of twenty, your codes are twenty characters long. In the [\[Click\]](#) ‘Charset’ field, you can choose from several options in a drop-down list that determine the character set combinations of your codes. For instance, the ‘Numeric’ option means all the characters in your codes contain numbers, while the ‘Alphanumeric’ option means the codes are a hybrid of numbers and alphabetical letters. Please note that as you are selecting the parameters of the codes, you can see the [\[Click\]](#) ‘Code Preview’ dynamically generating at the bottom of the screen. The [\[Click\]](#) ‘Prefix’ and ‘Postfix’ fields let you input numbers or letters to help brands quickly identify where the code goes. For instance, if the prefix for RAF is 001, a code with the first three digits as 001 indicates the code is associated to the RAF reward. Once you have configured your codes fields, [\[Click\]](#) click ‘Add Codes.’

**[Slide 22]** You are returned to the ‘Groups’ tab dashboard, where you can see your newly created group displayed with the applicable Group and Code Details. In the ‘Group ID’ column, next to each group identification number, there is a clickable [\[Click\]](#) ‘+’ button. Once clicked, you can toggle the [\[Click\]](#) ‘Status’ of each group to active or inactive. In the [\[Click\]](#) ‘Action’ row, there are several options. You can add codes to the group, edit the group, view the code details, delete the group, or clone the group.

## **Codes**

**[Slide 23]** Once your codes are created and attached to your group, you can assign or re-assign codes to members, as necessary. On the lefthand side of the screen, click on [\[Click\]](#) ‘Codes.’ Two options display below the ‘Codes’ tab: ‘Code Assign’ and ‘Code Re-assign.’

To assign codes to users, click [\[Click\]](#) ‘Code Assign.’ **[Slide 24]** The Code Assign screen displays several blank fields. In the [\[Click\]](#) ‘User Id’ field, you can input either an existing user identification number, or add a new user. Once you have entered a value, the [\[Click\]](#) ‘User Details’ fields can be edited. However, selecting an existing user id automatically populates the user details fields with their predefined values. For new User Ids, input the applicable first name, last name, email address, and phone number for the user, as necessary. In the required [\[Click\]](#) ‘Select Group’ field, select the appropriate group from the drop-down list. Please note that if a group has expired, meaning the set expiration date has passed, that group name will not appear as a selectable option. In the [\[Click\]](#) ‘Discount Amount’ field, select the desired benefit amount associated with the selected group. Once all the fields are filled, [\[Click\]](#) click ‘Submit.’ **[Slide 25]** A popup window alerts you that the incentive code is successfully assigned to the User Id entered,

as well as shows the populated incentive code, the associated group ID, and what value the code has. To exit the window, [\[Click\]](#) click ‘Close.’

**[Slide 26]** To reassign codes to different users, [\[Click\]](#) click ‘Code Re-assign.’ The Code Re-assign screen displays several blank fields. In the [\[Click\]](#) ‘User Id’ field, select an existing user identification number from the drop-down list. The [\[Click\]](#) ‘User Details’ fields auto populate the fields. In the [\[Click\]](#) ‘Select Group’ field, select the group identification number you want to transfer the code to. In the [\[Click\]](#) ‘Select Code’ field, choose the code. Depending on the benefit amount associated with the code during its creation, the value prepopulates in the [\[Click\]](#) ‘Discount Percentage’ field. Once all the fields are filled, click [\[Click\]](#) ‘Submit.’ **[Slide 27]** A popup window alerts you that the incentive code is successfully reassigned to the User ID entered, as well as shows the populated incentive code, the new group ID, and what value the code has. To exit the window, [\[Click\]](#) click ‘Close.’

### ***Member Dashboard***

**[Slide 28]** On the lefthand side of the screen, [\[Click\]](#) click ‘Member Dashboard.’ You are defaulted to the Dashboard admin page where you can view how Incentive Engine information will appear to loyalty members on your site. The Member Dashboard provides information on incentives earned, their redemption status, incentive expiration dates, and more.

You can download the Incentive Engine deployment script by [\[Click\]](#) clicking ‘Download Implementation Code,’ which displays in Notepad. If you want to make changes to an existing member dashboard theme, [\[Click\]](#) click ‘Edit.’ **[Slide 29]** If you want to build your own dashboard from scratch, you have the option by selecting [\[Click\]](#) ‘Activate’ under the ‘Build Your Own Theme’ module.

### ***Additional Settings***

**[Slide 30]** The [\[Click\]](#) ‘Additional Settings’ tab allows the brand to filter out certain words during the code generation process. You can exclude number sequences, undesirable words (profanity, competitor names, people’s names, etc.) from being randomly generated. To do this, [\[Click\]](#) click ‘Add Words’ to bring up the Add Exclude Words screen. **[Slide 31]** You can either [\[Click\]](#) manually enter the word you want to exclude from appearing or [\[Click\]](#) upload a CSV of all the words or numerical sequences you want to prevent from appearing in your codes. Enter the word to exclude and [\[Click\]](#) click ‘Submit.’ **[Slide 32]** If you wish to remove an existing word from the Exclude Words list, [\[Click\]](#) click the gray checkbox next to the applicable word and [\[Click\]](#) click ‘X Delete.’ **[Slide 33]** A popup window displays and confirms you want to delete the selected word. [\[Click\]](#) Click ‘Yes, Delete It’ to remove the word from the list.

### **[Slide 34] Takeaways**

**[Slide 35]** Thank you for watching! If you remember nothing else from this lesson, keep in mind these three things:

1. **[Click]** The Incentive Engine is an automated solution that allows you to create and manage codes or vouchers that will be used by loyalty members.
2. **[Click]** The codes autogenerated by Annex Cloud are aligned to the criteria set by program administrators to ensure they align with the look and feel of the brand.
3. **[Click]** The Incentive Engine is an efficient way to manage omnichannel promotions and distribution, ensuring that members can redeem their offers—such as gift cards, vouchers, and coupons—either partially or in full, anywhere they choose.