

Astro Loyalty

Real-time integration with Astro Loyalty in Retail Pro 9

Version History

- Version 1.0 – April, 2022: Released beta version with Frequent Buyer and Points support.
- Version 1.1 – September, 2022: Added support for Offers program; enhanced Points redemption; adjusted functionality for Return receipts.
- Version 1.2 – March, 2023: Improved messages for store activation and some bug fixes.
- Version 1.3 – August, 2023: Added support for new Offers program type; added better transaction failure and error handling.
- Version 1.4.x – September, 2023: Bug fixes; automatically update Customer when adding; detected manually removed Astro discounts; prevent overwriting automatic customer discounts; added support for customer frequent buyer cards.
- Version 1.5 – November, 2023: Added a “calculate discounts” button to recalculate any Astro Loyalty discounts that were inadvertently removed or overwritten, such as when the Promotional Discounts feature is used at the end of the receipt process.
- Version 1.6 – September, 2024: While interacting with the floating “Receipt Menu” and viewing the rewards for a completed Frequent Buyer card, reward items whose UPC codes are not found in inventory are removed from the list of claimable rewards to prevent invalid receipt entries.
- Version 1.7 – February, 2025: Some UPC codes in Retail Pro contain 13 digits with a leading zero that is not recognized by Astro Loyalty. A new option allows cutting this extra digit off.
- Version 1.8 – April, 2025: Add more logging and trapping of out-of-ordinary quantities.
- Version 1.8.1 – May, 2026: Bug fix for rare case of high-quantities; more logging.
- Version 1.8.2 – June, 2026: Added cashier confirmation if large quantity detected (> 100).

Introduction

The Astro Loyalty plugin for Retail Pro 9 provides real-time integration with the **Offers**, **Frequent Buyer**, and **Points** customer loyalty programs provided by Astro Loyalty. The plugin was developed and is maintained by Cornelius Concepts, LLC, a Retail Pro Development Partner and is sold through Retail Pro Business Partners to pet and feed stores all over North America.

Installation

The Astro Loyalty plugin is installed like other Retail Pro 9 plugins: files are placed in the Plugins folder of Retail Pro 9 and registered. The following files are required:

- AstroLoyalty.dll
- AstroLoyalty.mnf
- AstroLoyaltyBtn.bmp

Once these files are in the Plugins folder, run *Command Prompt as Administrator*, go to the RetailPro9\Plugins folder, and enter:

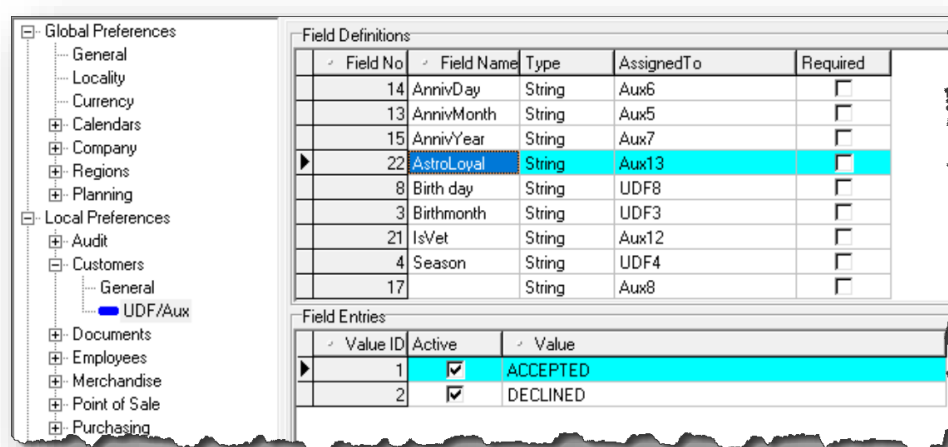
```
regsvr32 AstroLoyalty.dll
```

Post-Installation Retail Pro Tasks

Customer UDF

For efficient link to Astro Loyalty customers, the plugin saves the Astro Loyalty Customer ID in the Retail Pro customer record using a user-defined field, or UDF. This UDF must be created manually by a Retail Pro administrator (RPro Admin). To do this, the RPro Admin, using the Retail Pro interface, drills down from the *Options* button to *System Preferences > Local Preferences > Customers > UDF/Aux* and adds a **Field Definition** by clicking the *New* button. The **Field Name** must be "AstroLoyal" and should have two **Field Entries**:

- ACCEPTED
- DECLINED



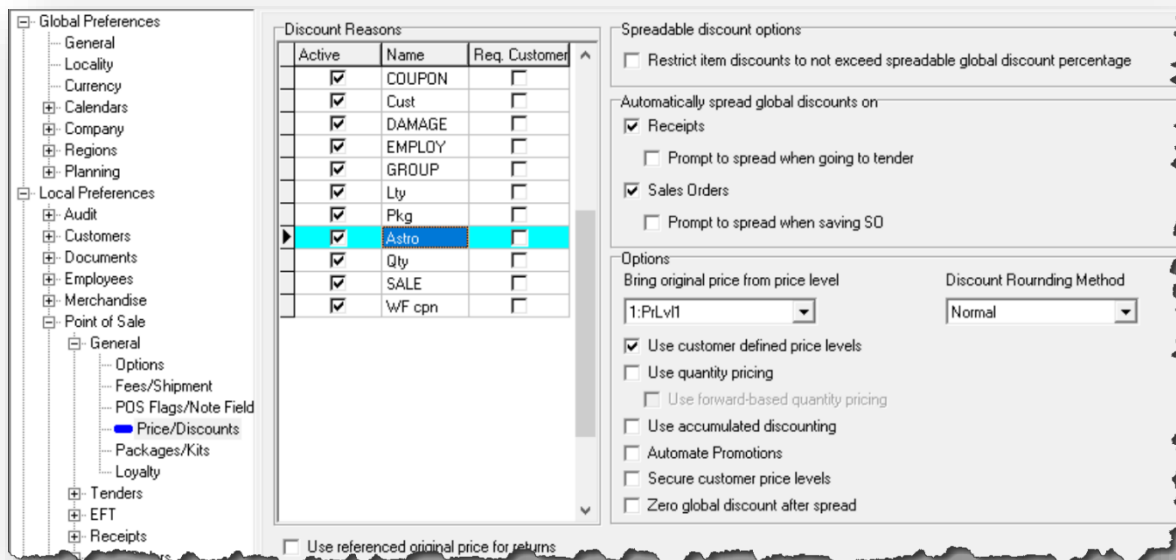
In addition to the numeric Astro Loyalty Customer ID, the ACCEPTED and DECLINED values of this UDF provide a way for a store's customer to opt out of the Astro Loyalty program.

Discount Reason

When Astro Loyalty rewards are redeemed, discounts are recorded on the Retail Pro receipt. These discounts will use a special "discount reason" set aside for Astro Loyalty rewards, not only for marking the items for use by plugin but also so the retailer can run reports and separate out Astro Loyalty discounts from other types of discounts given to customers.

To set this up, the RPro Admin drills down from the *Options* button to *System Preferences > Local Preferences > Point of Sale > General > Price/Discounts* and adds or selects a **Discount Reason** to use. Later when configuring the Astro Loyalty plugin, this Discount Reason will be selected so the plugin will know which one to use when assigning discounts to items on a receipt.

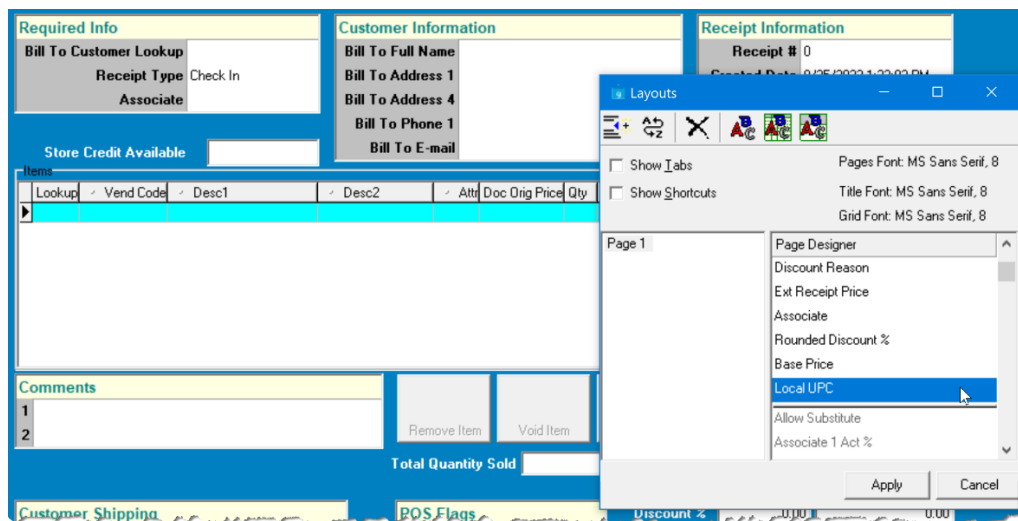
In the example screenshot below, "Astro" has been added for use by the plugin but a different one can be created.



Receipt Screen – Items Grid

When claiming rewards for free items, the items added to the receipt are referenced by UPC. In addition to the typical “Lookup UPC” column that is usually in the field list, the **Local UPC** column needs to be included as well. It can be hidden from view but must be in the available list of fields the plugin can access or the items get immediately removed by Retail Pro as soon as the plugin adds them.

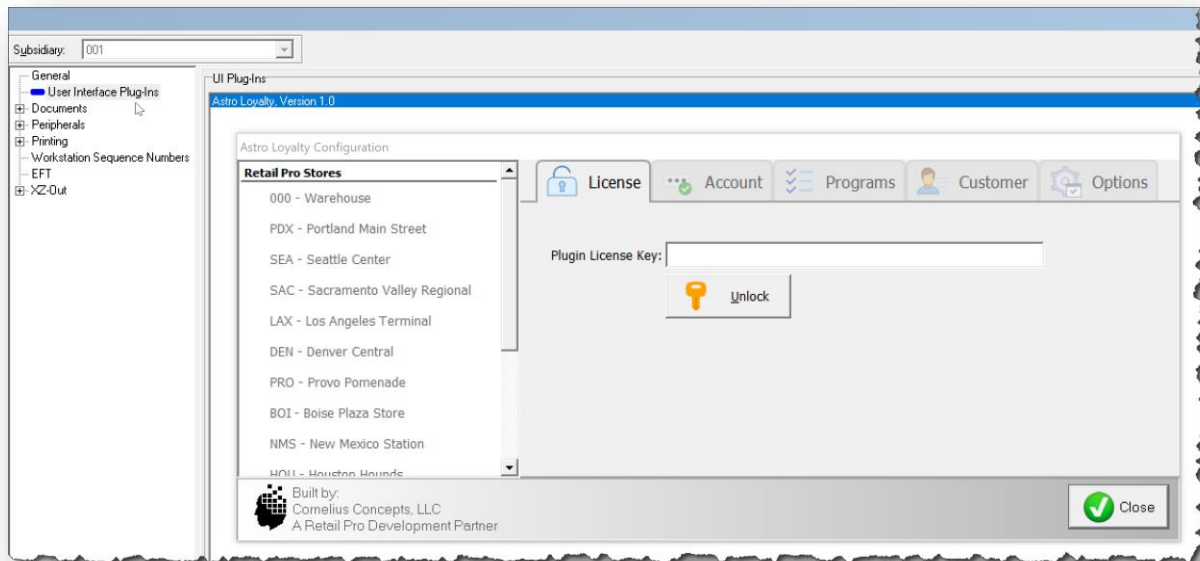
To verify this field is in the list (or to add it if it’s not), you need to be logged in with security rights to modify screen designs (e.g. SYSADMIN), then *right+click* on the “Items” column header of a former receipt and select *Interface > Page Manager*. A pop-up window appears; in the right-hand column is a list of fields under Page Designer. The top half is the list of currently enabled fields, the bottom half are fields that are not included. If the “Local UPC” is not in the top half, scroll through the alphabetical fields in the bottom half to find it, double-click it to add it to the top half, then click *Apply*.



Plugin Configuration

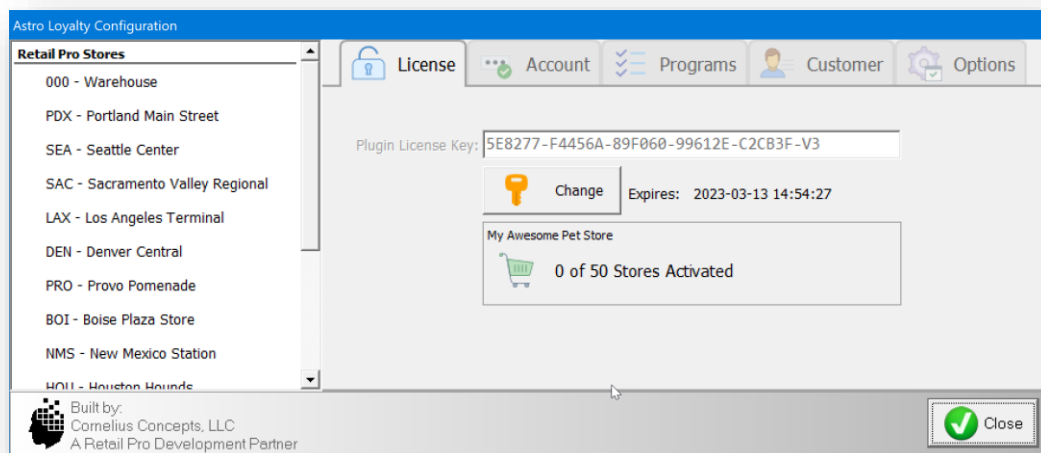
License

Once the Customer UDF and Discount Reason mentioned in the previous section have been set up, it's time to configure the Astro Loyalty plugin itself. It is configured through Retail Pro 9's standard plugin interface under *Options > WS Preferences > User Interface Plug-Ins* and clicking on the **Astro Loyalty** entry. The stores defined in Retail Pro are listed on the left and various configuration tabs are on the right. Before any of the stores can be configured, a valid license key must be given on the **License** tab:



The license key will be provided by the Retail Pro Business Partner and is linked to the Client ID of the Retail Pro 9 installation.

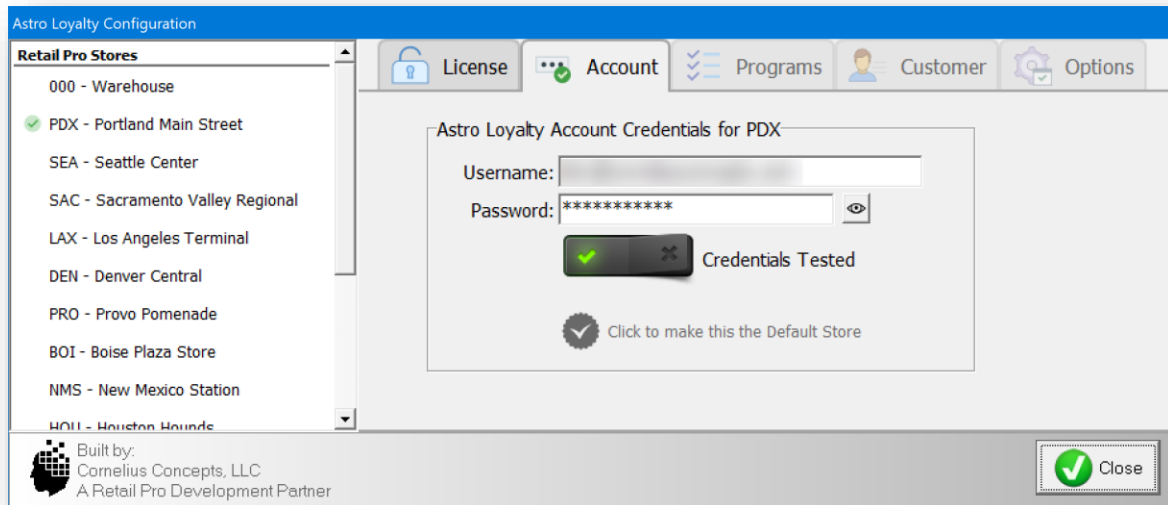
Once the license is entered and validated, the expiration and store name are displayed:



The **License** tab is global for all stores; all other configuration tabs are store-specific; you must first click on the store name in the list on the left, then click on one of the tabs described below.

Account

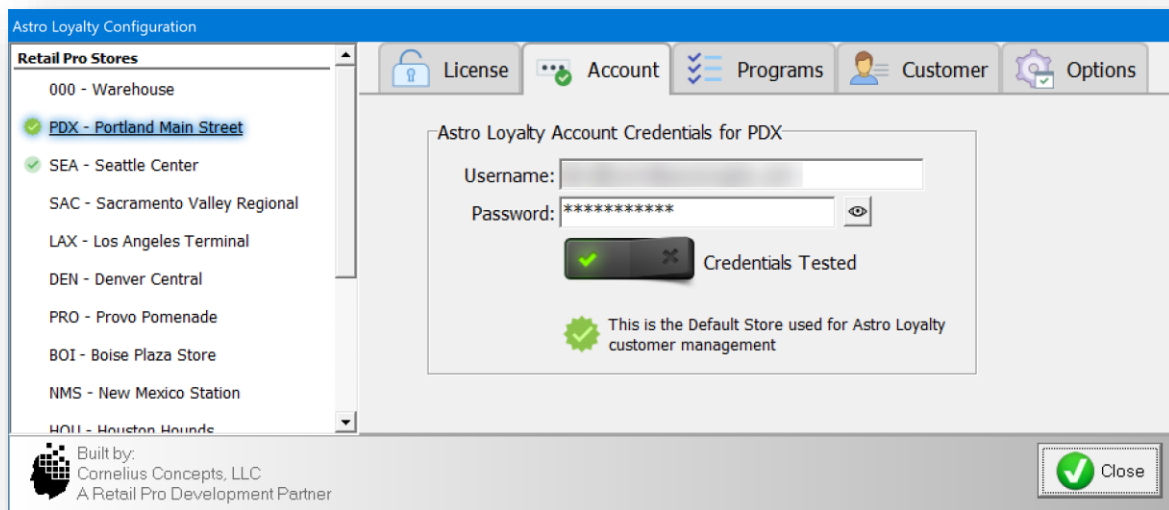
Now that an active Astro Loyalty license is in place, the stores can be configured. Each store that uses Astro Loyalty must enter the unique credentials provided for that location by Astro Loyalty on the store's **Account** tab, then click to enable that store. The plugin attempts to connect with Astro Loyalty using the credentials provided and if successful, marks the store as enabled:



Default Store

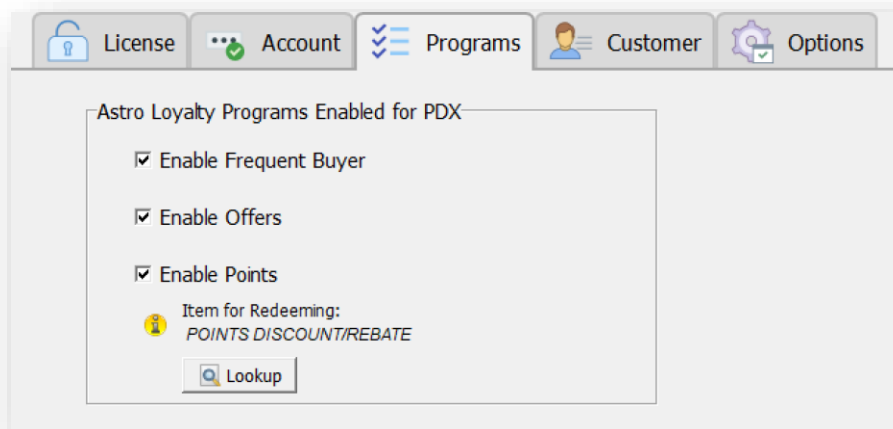
When working with a receipt, Astro Loyalty always knows which store account to use because Retail Pro's receipt context defines the current store code. However, when working in the Customer module, the current store is undefined. Therefore, we need to tell the plugin which of its enabled stores to use for communication with Astro Loyalty.

Once at least one of the stores are enabled, you can click the circled checkmark to mark that store as the default store. There can only be one default store—a different one can be selected at any time which unselects a previously selected default store if one was established.



Programs

Not all of Astro Loyalty's programs will be used by a store; check only those in which the store is participating on the **Programs** tab of this configuration. This limits the amount of information sent to Astro Loyalty and hides screens and buttons for the programs that are irrelevant.



The Points program requires the selection of a non-inventory Retail Pro item created specifically for redeeming rebates and discounts in the Points program. This item does not need a UPC or ALU but does need a price (otherwise, whenever redeeming points for discounts or rebates, you'll be prompted to set the price). A *Lookup* button is provided to select this item. Once the item is selected, its description shows under the label, "Item for Redeeming."

Customer

If a new customer wants to participate in the benefits provided by Astro Loyalty programs, they first must have a customer record in Retail Pro. Once that has been created, the customer can be added to Astro Loyalty as a new customer or linked with an existing one. The customer information is always synchronized one-way, *from* Retail Pro *to* Astro Loyalty.

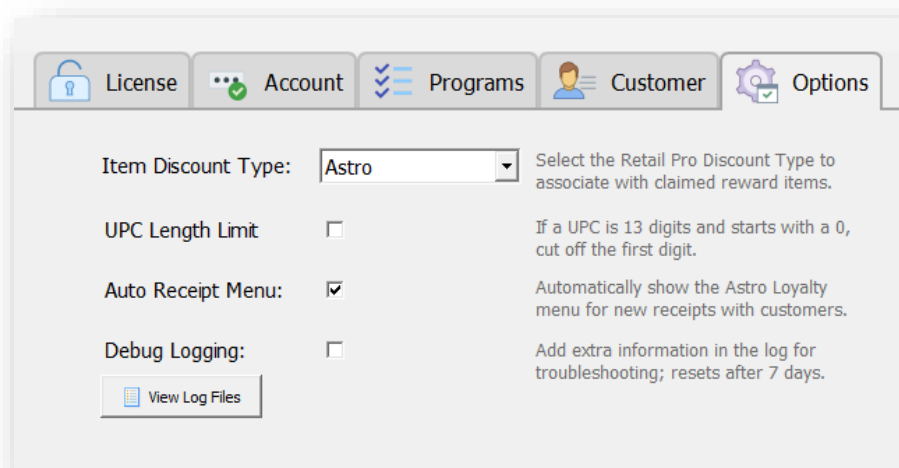
The screenshot shows the 'Customer' tab in the plugin's settings. The 'Customer Field Mapping' section is titled 'Astro Loyalty → Retail Pro'. It contains three fields: 'City' mapped to 'Address 3', 'State' mapped to 'Address 4', and 'Phone' mapped to 'RPro Phone' with radio buttons for 'Phone 1' (selected) and 'Phone 2'.

Retail Pro has more fields than Astro Loyalty (6 address lines and 2 phone fields as opposed to Astro Loyalty's single address line and phone). When sending updated customer information to Astro Loyalty, the plugin needs to know from which of these Retail Pro address lines to pull city and state and which phone field to send.

If customer records in Retail Pro are configured to store city and state values on a single address line, select that one address line for both fields—the plugin can separate them if they are in the common "city, state" format.

Options

Finally, the **Options** tab of the Astro Loyalty plugin configuration provides these additional settings:



- **Item Discount Type:** In the *Post-Installation Retail Pro Tasks* section above, a *Discount Reason* was set aside for use by the plugin; this is where you select that reason. The drop down here lists all Discount Reasons found in Retail Pro; select the one to apply to receipt items used to mark rewards for Astro Loyalty.
- **UPC Length Limit:** Some UPCs are set at 13 digits and contain a leading zero. If this is causing problems with items being recognized by the Astro Loyalty program, check this box to remove that leading zero, sending a 12-digit UPC to Astro Loyalty.
- **Auto Receipt Menu:** When a customer is placed on a new receipt in Retail Pro, a floating window providing real-time interaction with the customer's Astro Loyalty information can be displayed by clicking a side-button provided in the plugin. As a convenience, this floating window can be automatically displayed by checking this box.
- **Debug Logging:** Actions taken by the plugin are logged in a text file and contain a record of interactions with Astro Loyalty such as linking a customer, adding a transaction, and redeeming a reward. If there arises a need to troubleshoot a problem, the Debug Logging checkbox can be checked to add detailed information in the log to help pinpoint the source of the problem. Since this additional information could eventually take up a lot of disk space, it automatically turns off after 7 days.

To view log files, click the *View Log Files* button and select a file from the list. They are text files with a file extension of `.log` and can be viewed with any text editor, such as Notepad.

Customer Management

In the Customer module of Retail Pro, a side-button is provided by the Astro Loyalty plugin to manage customer linking between Retail Pro and Astro Loyalty. Management here is optional and can be done from the Receipt Menu (described below) but allows traversing across multiple customers using the *Prev* and *Next* buttons. You can also opt the customer out of the Astro Loyalty programs which will prevent sending any information to Astro Loyalty for that customer.

The information for Astro Loyalty programs for customers in this screen uses the Default Store selected in the configuration.

Contact & Address Info

From the **Contact & Address Info** tab of this screen, you can update the address, phone number, and email address in Astro Loyalty to match the billing address associated with the Retail Pro customer and resend the Astro Loyalty welcome email:

The screenshot displays the Retail Pro Customer Management interface. The top toolbar includes buttons for New, Inactivate, Edit, Cancel, Copy, Form View, Print, and Review Report. The left sidebar contains navigation options: Help, Next, Previous, Date Range, Filtered View, Cancel Filter, Show Customers, History, Profile, Adjust Loyalty, and Astro Loyalty. The main area shows a list of customers with columns for Cust ID, Last, First, E-mail, Phone1, Phone2, Last Sale Dt, Str Code, and Addr1. The customer Ezekiel Bittner is selected, and the 'Contact & Address Info' tab is active. The tab displays the customer's name, Astro ID (6536030), and Loyalty Points (1180.40). Below this, the 'Address' and 'Phone' fields are shown for both Retail Pro and Astro Loyalty. The 'Email' field is also displayed. At the bottom, there are buttons for 'Update Astro Information' and 'Resend Welcome Email'. The bottom of the screen shows navigation buttons for Prev, Next, Opt Out, and OK.

Cust ID	Last	First	E-mail	Phone1	Phone2	Last Sale Dt	Str Code	Addr1
121	Logsdon	Elwood	el@nowhere.net	410410		7/26/2020	000	
8696	Leake	Charisse	nalnmfa908@example.com	(977) 804-3317	(987) 320-12	2/17/2022	SEL	1895 North Qualwood
5651	Bittner	Ezekiel	LesSherwood@example.com	(475) 555-1212	(935) 555-12	8/21/2022	PDX	143 S Appleton RD
9694	Chen	David	David.Chen@example.com	(408) 555-0310		3/1/2022	SEA	220 Chapel Hill Circle
203								Bend Road
565								Wood Park
290								Parkway
390								Rushwood
465								Hunting Hill
699								St Flintwood
798								Stonewood
290								Wood Way
869								Woodway
103								Wood Lane
799								Wood Lane
565								Wood Lane
699								Wood Lane
31								Wood Lane
7								Wood Lane
290								Wood Lane
291								Wood Lane
799								Wood Lane
465								Wood Lane
970								Wood Lane
699								Wood Lane
3								Wood Lane
203								Wood Lane
969								Wood Lane
869								Wood Lane
799								Wood Lane
699								Wood Lane
103								Wood Lane
465								Wood Lane
969								Wood Lane
8699	Dupree	Leonard		(667) 981-8446	(513) 150-5		SEL	876 NE Rushwood
9697	Cheung	Kandace	AlbertsonZ34@example.com	(749) 215-6334	(213) 123-5		SAC	46 Hidden River

Opt Out / Opt In

You can also click the *Opt Out* button to mark this customer as not participating in the Astro Loyalty programs; once a customer is opted out, the button changes to *Opt In*—the status can be changed at any time. While opted out, no customer information is sent to Astro Loyalty, Astro Loyalty points are not accumulated, and Frequent Buyer cards are not available.

Frequent Buyer

Switching to the **Frequent Buyer** tab shows details of the current status of the customer's Astro Loyalty punch cards including the name, ID, and description of the card along with a visible representation of the progress of punches toward the next reward:

Astro Loyalty Customer Management

Ezekiel Bittner Loyalty Points: **849.67**
AstroID: 6536030

Contact & Address Info **Frequent Buyer** Points

KLN/Tuffy's CAT | 5/5.5oz Can x12 CASES | Official Buy 12 Get 1 Free
Card ID: 20409746 [Expand Details](#)
Dog & Cat Kibble & Case Frequent Purchase Program. Items are grouped according to Food Type, Species, and Size. Customers can redeem only purchased items on their card. You must complete and redeem your card at one local pet food store or chain.

1 2 3 4 5 6 7 8 9 10 11 12

Champion Petfoods CAT | 10lb & 12lb Kibble LG | Official Buy 12 Get 1 Free
Card ID: 20407178 [Expand Details](#)
Champion Pet Foods Frequent Purchase Program for Acana & Orijen. Trial Size Bags are Excluded. Once you purchase 12 bags belonging to Same Species and Weight Group within 24-months, you will receive One bag from the same group Lesser than or Equal to that of the Least Valued item you purchased. Your Address is required upon redemption. All of your purchases must occur at the same local pet food store or chain.

1 2 3 4 5 6 7 8 9 10 11 12

Champion Petfoods CAT | 4lb Kibble SM | Official Buy 12 Get 1 Free
Card ID: 19549938 [Expand Details](#)
Champion Pet Foods Frequent Purchase Program for Acana & Orijen. Trial Size Bags are Excluded. Once you purchase 12 bags belonging to Same Species and Weight Group within 24-months, you will receive One bag from the same group Lesser than or Equal to that of the Least Valued item you purchased. Your Address is required upon redemption. All of your purchases must occur at the same local pet food store or chain.

1 2 3 4 5 6 7 8 9 10 11 12

← Prev Next → Opt Out OK

Clicking the *Expand Details* button reveals the transactions accrued for the selected card.

Points

On the **Points** tab are displayed the events that affected points, both points accrued for sales and points used for redemptions or returns:

Astro Loyalty Customer Management

Ezekiel Bittner

AstroID: 6536030

Loyalty Points:

849.67

Contact & Address Info

Frequent Buyer

Points

Description	Purchase Date	Qty	Points
Earn 1pt for every \$1 purchase	4/22/2022	-150.00	-150.00
Earn 1pt for every \$1 purchase	4/22/2022	-295.00	-295.00
Earn 1pt for every \$1 purchase	4/22/2022	354.13	354.13
Free Dog Treat	4/22/2022	1.00	-25.00
Earn 1pt for every \$1 purchase	4/21/2022	79.31	79.31
\$10 off your purchase	4/21/2022	1.00	-100.00
Earn 1pt for every \$1 purchase	4/21/2022	69.31	69.31
\$10 off your purchase	4/21/2022	1.00	-100.00
Earn 1pt for every \$1 purchase	4/21/2022	317.24	317.24
Earn 1pt for every \$1 purchase	4/21/2022	-13.00	-13.00
Earn 1pt for every \$1 purchase	4/21/2022	237.93	237.93
Free Dog Treat	4/21/2022	1.00	-25.00
Earn 1pt for every \$1 purchase	4/21/2022	-36.00	-36.00

← Prev

Next →

✖ Opt Out

✓ OK

Offers

It should be noted that even if the Offers program is enabled for the default store, there is no useful information to show in the Customer module of Retail Pro and therefore no Offers tab in the Customer Management screen.

Receipts

The main functionality of the plugin happens during the receipt process and several aspects are taken into account behind the scenes to enhance the customer experience, reduce cashier fatigue, and eliminate errors.

Customer Linked and Opted In

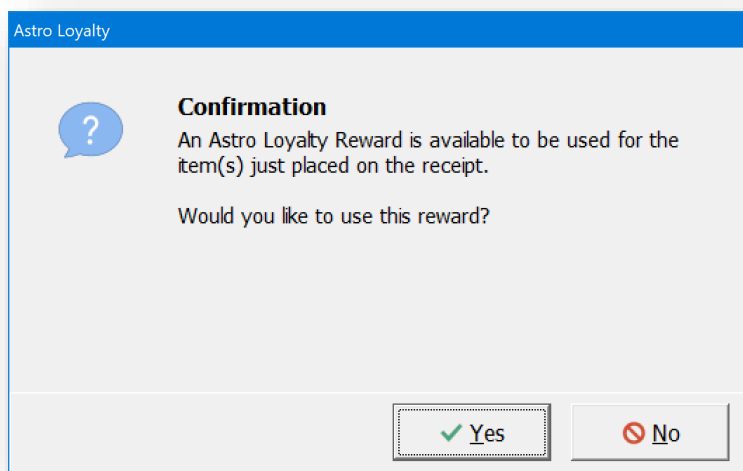
For customers to receive loyalty rewards, they must have an account in Astro Loyalty with their Astro Loyalty Customer ID stored in their Retail Pro customer record; additionally, they must be opted-in to participate in the Astro Loyalty program. This simply means that the customer UDF named "AstroLoyal" (described earlier) is marked ACCEPTED. A customer can change their participation in the Astro Loyalty programs at any time with a simple button in the floating Receipt Menu (described below).

Note: Some of the Frequent Buyer and Offers programs require email and/or address information from the customer before giving rewards.

Receipt Purchases – Frequent Buyer

If the Frequent Buyer program is enabled, then as items are placed on the receipt, they are sent to Astro Loyalty as Frequent Buyer transactions for the card. If the receipt is canceled or put on hold, the transactions in Astro Loyalty are removed; a held receipt that is re-edited will reprocess the items and add the transactions back to Astro Loyalty if applicable at that time.

If a Frequent Buyer card has been filled and an item that matches one of the eligible reward items is added to the receipt, a prompt to use the item as the reward will appear:



Answering "No" will add the item to the receipt as a normal purchase, adding it to a new Frequent Buyer card. The skipped reward can be claimed later.

Receipt Purchases – Offers

If the Offers program is enabled, then as items are placed on the receipt, they are checked against a master list of enrolled Astro Loyalty offers for the store. If an item qualifies for an Offer reward, the reward is automatically applied, either in the form of a discount on the item, or a rebate applied against the price of the item. There is no manual “claim” process for rewards in the Offers program.

Receipt Purchases – Points

If the Points program is enabled, points will be accumulated for the customer in Astro Loyalty after the receipt is tendered and saved. There is no automatic “claim” process for rewards in the Points program—to “claim” points rewards, use the Receipt Menu described below.

Reward Items

Astro Loyalty rewards appear on the Retail Pro receipt as discounted items with the specially selected discount reason; if a particular reward is for a free item, the discount amount is 100%.

The Frequent Buyer and Offers programs have the ability to automatically assign Astro Loyalty rewards as described above (Frequent Buyer rewards can also be manually claimed). Points rewards must be manually claimed—the process for claiming rewards will be described below.

The following screen shot shows three rewards on one receipt, indicated by the Discount Reason of “Astro” as selected in this particular configuration. The first reward is a \$3.00 discount from a manufacturer offer; the second is a \$10.00 rebate claimed from accumulated points for this customer; the third is a bag of free cat food resulting from a completed frequent buyer card:

Required Info				Customer Information				Receipt Information			
Bill To Customer Lookup				Bill To Full Name Ezekiel Bittner				Receipt # 0			
Receipt Type Regular				Bill To Address 1 143 S Appleton RD				Created Date 8/23/2022 2:23:34 PM			
Associate CARLAC				Bill To Address 2 Apt 123				Sales Order #			
				Bill To Phone 1 (475) 555-1212				Cashier CARLAC			
Bill To E-mail LesSherwood@example.com				Store Portland Main Str PDX							
Store Credit Available											
Items											
Lookup	Vend Code	Desc1	Desc2	Attr	Size	Qty	Doc Orig Price	Rcpt Price	Disc%	Ext Rcpt Price	Disc Rsn
	BOXCAT	SCOOP AND SPRAY	LITTER EXTENDE		24 OZ	1	24.00	21.00	12.50	21.00	Astro
	CHMPET	DRY CAT FOOD	CHAMPION USA AC BC		10LB	1	33.88	33.88	0.00	33.88	
	RPRO	POINTS DISCOUNT/REB.				1	1.00	-10.00	100.00	-10.00	Astro
	CHMPET	DRY CAT FOOD	CHAMPION USA AC BC		10LB	1	33.88	0.00	100.00	0.00	Astro

These rewards are considered "claimed" but not yet redeemed. If the receipt is put on hold, points rewards are removed and the claimed discount rewards will revert to simple purchases and re-evaluated when the receipt is re-edited. If the receipt is canceled, all purchases and pending rewards will be discarded; discarded rewards can be claimed later (with the possible exception of Manufacturer Offers which have expiration dates). Points used for claimed rewards never permanently subtract from the customer's points balance until a receipt with a points reward is tendered and saved.

Other Reward Notes:

- Once a reward for a free or discounted item is claimed and put on the receipt, it's quantity cannot be changed.
- If the price of a reward item is changed, the discount reason prompt is presented by Retail Pro and if the one used for Astro Loyalty is selected, the price change is rejected; if a different discount reason is selected, the reward is "unclaimed" and the price and discount are reset.
- If the UPC is changed, the reward is "unclaimed" and the discount reason used for Astro Loyalty is removed.
- Manually selecting the discount reason reserved for Astro Loyalty is not allowed.
- All claimed (pending) rewards are redeemed once the receipt is tendered and saved.
- Receipts marked as "Return" receipts do not accumulate Frequent Buyer punches and no rewards can be claimed or redeemed. Once a receipt has been marked as a "Return" receipt, the Astro Loyalty plugin will deactivate for that receipt, even if it is switched back to a "Regular" receipt—only completing or canceling the receipt and starting a new one will re-engage the Astro Loyalty plug-in functionality; the exception is that points (if enabled for your store) will still be affected: if the item subtotal is negative, it can subtract from a customer's point balance.

Choose/Edit Items button

If the *Choose/Edit Items* button in Retail Pro is used, all items on the receipt (except non-inventory items used to record points discounts and rebates) are re-processed as if they were newly added to the receipt (this is because all items and their quantities could've changed when using this button). As these items are re-evaluated, they could initiate the same prompts to accept Frequent Buyer rewards as seen previously and Offers rewards will again be automatically claimed.

It is highly recommended to claim rewards after all regular purchasable items have been added to the receipt and as the last step before tendering to avoid confusion and re-processing.

Receipt Menu

To interact with Astro Loyalty functions and to check customer status in any of the programs during the receipt process, a side-button is provided in the receipt screen that activates a floating "Receipt Menu" providing abbreviated status information displayed on each of its "menu buttons." The floating interface can be moved around depending on the cashier's preference and "sticks" wherever it is left, reappearing in the same place it was last viewed; it can also be toggled vertically or horizontally.

The screenshot shows the Retail Pro interface with a floating "Astro Loyalty" menu. The menu contains the following sections:

- Customer:** Charisse Leake
- Frequent Buyer:** Cards: 5, Rewards: 1
- Mfg Offers:** Available Offers: 9
- Points:** Balance: 868

The background receipt screen displays the following information:

- Required Info:** Bill To Customer Lookup, Receipt Type: Regular, Associate: CARLAC
- Customer Information:** Bill To Full Name: Charisse Leake, Bill To Address 1: 4432 West Main, Bill To Address 4, Bill To Phone 1, Bill To E-mail: nalmzmfa908@example.com
- Store Credit Available:** [Empty field]
- Items:** A table with columns: Lookup, Vend Code, Desc1, Desc2, Attr, Doc Orig. The table contains one item: CHMPET, DRY CAT FOOD, CHAMPION USA ACANA, HH, 33.
- Comments:** [Empty text area]
- Customer Shipping:** Ship To Customer Lookup, Ship To Address Name: Benton
- POS Flags:** POS Flag 1, POS Flag 2
- Total Quantity Sold:** [Empty field]

The screenshot shows the Retail Pro interface with a floating "Astro Loyalty" menu. The menu contains the following sections:

- Customer:** Charisse Leake
- Frequent Buyer:** Cards: 5, Rewards: 1
- Mfg Offers:** Available Offers: 9
- Points:** Balance: 868

The background receipt screen displays the following information:

- Comments:** [Empty text area]
- Customer Shipping:** Ship To Customer Lookup, Ship To Address Name: Benton, Ship To Address 1: 1895 North Quailwood Way, Ship To Address 2, Ship To Postal Code: 70689
- POS Flags:** POS Flag 1, POS Flag 2, POS Flag 3
- Total Quantity Sold:** 4
- Subtotal:** 39.07
- Tax Area:** 0.00
- Discount %:** 0.00
- Shipping:** 0.00
- Fee Name:** 0.00
- Receipt Total:** 39.07

Receipt Menu – Customer

Customer contact information and opt-out status, along with management of each of the customer's loyalty programs can be accessed through "fly-out" windows activated next to the corresponding menu button. If the *Customer* button is clicked a "fly-out" window is opened right next to it, similar to what is seen in the Customer module—but much more compact. This allows the cashier to add a customer to Astro Loyalty or update an existing customer's Astro Loyalty contact information during the check-out process.

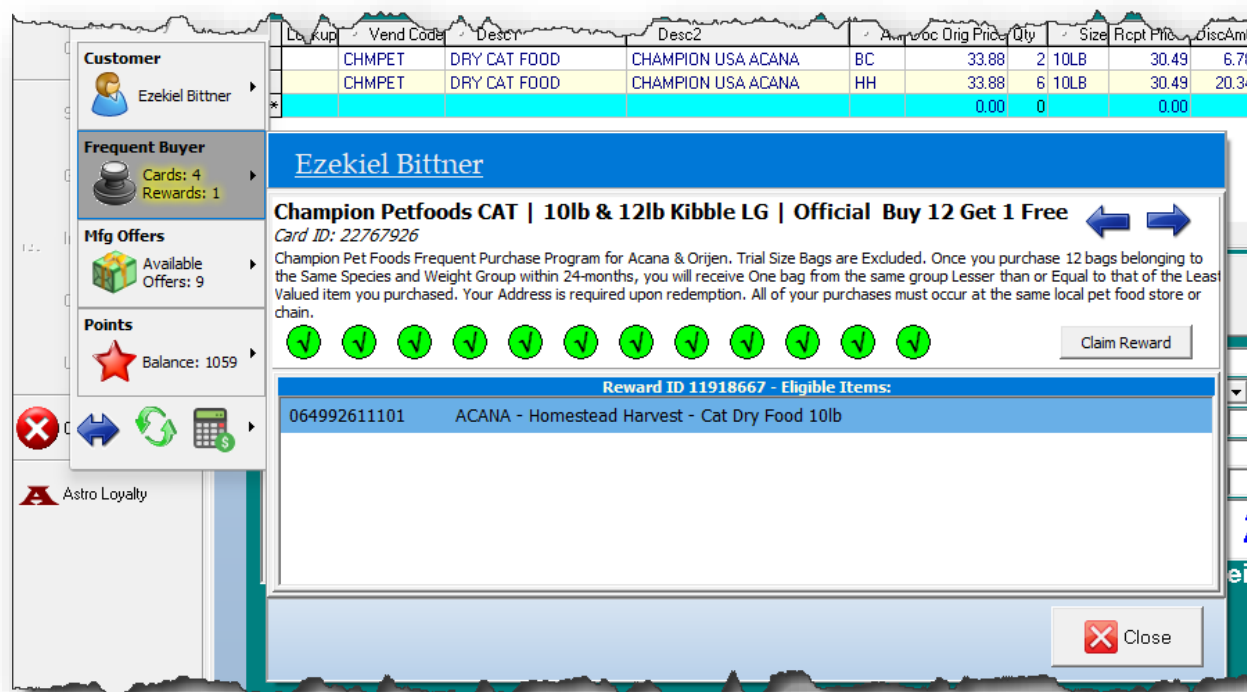
A Retail Pro customer added to the receipt that does not have a corresponding Astro Loyalty customer record will show as "<Unassigned>". Clicking the Customer fly-out window and then the *Add* button will associate the Retail Pro customer with an Astro Loyalty customer, either by adding a new Astro Loyalty customer with the information from Retail Pro or by selecting an existing Astro Loyalty customer record; existing records are matched by email address or phone, or a list of matching first and last names is presented from which one can be selected.

Devon Ruffin		Astro ID: <not assigned>
Retail Pro	Address 39 Chapel Hill Lane Algonquin CA 88781	Address
	Phone (449) 555-1212	Phone
	Email Greenlee@example.com	Email

Once the Retail Pro customer is linked to an Astro Loyalty customer, the two sets of data are listed and can be compared. If the customer's address in Retail Pro has changed, the Astro Loyalty record can be updated by simply clicking the *Update* button. If the customer wants to opt out of the program, they can do that from here as well.

Receipt Menu – Frequent Buyer

The *Frequent Buyer* button similarly opens a fly-out window to view card punches and their transactions; use the blue arrows to cycle through various cards. If a card is full, the card's reward is available and the Claim Reward button appears with a list of eligible items replacing the transactions:



Clicking the *Claim* button puts the selected reward item on the receipt with the discount reason reserved for Astro Loyalty. Once an item is claimed, the button switches to *Unclaim* for that item; clicking *Unclaim* will remove the reward item from the receipt.

Note: Some Frequent Buyer programs require email and/or address information before granting rewards. If the customer information is lacking this, reward submission will fail and an explanatory message will appear. The customer record in Retail Pro will need to be amended with the required information, Astro Loyalty updated, then the reward can be re-submitted.

Receipt Menu – Offers

The *Mfg Offers* button's fly-out window shows a list of manufacturer offers enrolled for the current store along with their description. If there are any items on the current receipt that match a current offer resulting in a discounted or free item, another tab in this window appears listing those offers that will be redeemed when the receipt is tendered. Some offers have limits on the number of items that can be discounted; if the limit has been reached for an item, a third tab appears listing the reason there is no discount.

The screenshot shows the Astro Loyalty software interface. On the left is a sidebar with the following sections:

- Customer:** Ezekiel Bittner
- Frequent Buyer:** Cards: 4, Rewards: 1
- Mfg Offers:** Claimed Rewards: 2
- Points:** Balance: 874

At the bottom of the sidebar are three icons: a blue arrow, a green circular arrow, and a yellow information icon.

The main window displays a receipt table with the following data:

Item	Qty	Unit Price	Total Price
CFP2277 CHMPET DRY CAT FOOD CHAMPION USA & HH 10LB	4	33.88	0.00
CFP9588 CHMPET DRY CAT FOOD CHAMPION USA & TU 12LB	8	79.31	0.00
BOXCAT SCOOP AND S LITTER EXTENDED 24 OZ	1	21.00	12.50
CHMPET ACANA - FREE FREE-RUN CHICK CHICKEN 8 OZ	1	0.00	00.00

The 'Mfg Offers' fly-out window is open, showing the name 'Ezekiel Bittner' and two tabs: 'Manufacturer Offers for this Store' (selected) and 'Offers Redeeming on this Receipt'. The list of offers includes:

- Etta Says! | Buy 2, Get 1 FREE on Select Etta Says! Treats
- ökokat® | Dollars OFF ökokat® Litter
- Nulo | Buy 4, Get 1 FREE on Freestyle Cat Pouches
- Nandi Pets | FREE Freeze-Dried Lamb Treat with Purchase of any Treat
- Grandma Lucy's | BOGO on Small Bags
- ACANA | Dollars OFF ACANA High Protein Biscuits

Below the list is a descriptive text for 'Etta Says! meat treats': 'Etta Says! meat treats are packed with flavor and protein to keep your dog fueled for whatever adventure they go on. These treats are 100% human-grade with high protein and low fat.'

A 'Close' button with a red 'X' icon is located at the bottom right of the fly-out window.

Note: Some Offers programs require email and/or address information before granting rewards. If the customer information is lacking this, reward submission will fail and an explanatory message will appear. The customer record in Retail Pro will need to be amended with the required information, Astro Loyalty updated, then the reward can be re-submitted.

Receipt Menu – Points

The *Points* button's fly-out window allows claiming of a reward, viewing points events, and manually adjusting a customer's points balance. Here's a screenshot of the **Reward Options** tab showing available points rewards for this store, the points required for each, and a button to claim the reward:

The screenshot shows the Astro Loyalty interface. On the left, a sidebar contains icons for 'Choose/Edit Items', 'Customer', 'Frequent Buyer', 'Mfg Offers', and 'Points'. The 'Points' section shows a balance of 984. The main window displays a list of items with columns: Lookup, Vend Code, Desc1, Desc2, Attr, Doc Orig Price, and Qty. The items listed are:

Lookup	Vend Code	Desc1	Desc2	Attr	Doc Orig Price	Qty
	CHMPET	DRY CAT FOOD	CHAMPION USA ACANA	BC	33.88	
	CHMPET	DRY CAT FOOD	CHAMPION USA ACANA	HH	33.88	
	CHMPET	DRY CAT FOOD	CHAMPION USA ACANA	HH	33.88	
	NANDI	FREE GROOMING			0.00	
	NANDI	DOG TREAT	BUSHVELD ANTELOPE - CLASS		9.99	

Below the items list, there is a 'Comments' section. The 'Points' menu is open, showing the 'Reward Options' tab. The menu title is 'Ezekiel Bittner'. The tabs are 'Reward Options', 'Loyalty Activity', and 'Adjust Points'. The 'Reward Options' tab displays a table of rewards:

Type	Title	Points Req'd
Free Item	Free Lotus Canned Dog Food	25
Free Item	Free Grooming	150
Free Item	Free Dog Treat	25
Rebate	\$10 off your purchase	100
Discount	10% off your next purchase	100

At the bottom of the menu, there are buttons: 'Claim' (with a money bag icon), 'Unclaim Rebate/Discount', and 'Close' (with a red X icon).

Claiming Points Rewards

There are three types of points rewards: 1) Free Items, 2) Discount, and 3) Rebate. Free items are placed on the receipt just like Frequent Buyer rewards. Discounts and Rebates use a specially designated, non-inventory item placed on the receipt where the price is set according to the award value in order to reduce the total due on the receipt. For example, if the current sub-total is \$20 and an award is being claimed for 10% off, the non-inventory item's price added will be set at -\$2.00 bring the new receipt sub-total down to \$18.00.

Points History

The **Loyalty Activity** tab shows the same information as the Points tab of the Customer Management screen described earlier, the events that affected points, both points accrued for sales and points used for redemptions or returns.

Adjusting Points

If necessary, a customer's points balance can be changed on the **Adjust Points** tab:

The screenshot shows the 'Adjust Points' dialog for customer Ezekiel Bittner. The dialog has three tabs: 'Reward Options', 'Loyalty Activity', and 'Adjust Points'. The 'Adjust Points' tab is active, showing the 'Current Astro Points Balance: 984'. Below this, there is an 'Adjustment Amount' field with a spinner box set to 25. There are two buttons: a green '+ Add' button and a red '- Subtract' button. A 'Close' button is at the bottom right. In the background, a table of transactions is visible.

Lookup	Vend Code	Desc1	Desc2	Attr	Doc Orig	Pric
	CHMPET	DRY CAT FOOD	CHAMPION USA.ACANA	BC		33.8
	CHMPET	DRY CAT FOOD	CHAMPION USA.ACANA	HH		33.8
	CHMPET	DRY CAT FOOD	CHAMPION USA.ACANA	HH		33.8
	NANDI	FREE GROOMING				0.0
	NANDI	DOG TREAT	BUSHVELD ANTELOPE - CLAS			9.9

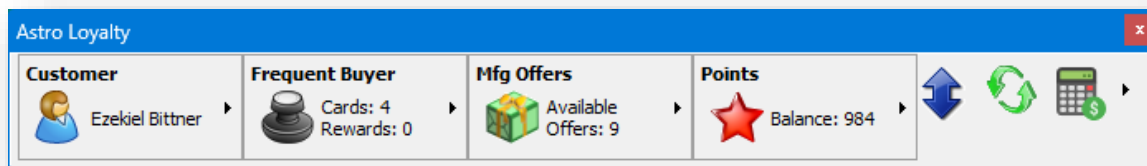
You can type the amount of the adjustment or use the edit box's arrow keys to set the amount, then click either the *Add* or *Subtract* buttons to adjust the customer's points balance by that amount. The adjustment is sent directly to Astro Loyalty—there is no item added to the receipt nor does the receipt need to be tendered in order for the adjustment to take place. The adjustment will show up as a standard transaction on the Loyalty Activity tab.

Other Buttons

There are four buttons at the end of the floating Astro Loyalty receipt menu: Toggle Orientation, Refresh Programs, Calculate Discounts, and Plugin Information.

Toggle Orientation

The blue left-right arrow shown in vertical mode toggles orientation to horizontal mode:



Once in horizontal mode, it is changed to an up-down arrow that toggles it back to vertical mode.

Refresh Programs

The green cyclical arrows button refreshes the plugin's internal list of enrolled Offers and Frequent Buyer programs in which the store is currently enrolled. This should seldom be necessary as the list is refreshed on a daily basis but if programs are added during the middle of the day, this will ensure customers are taking advantage of all the latest loyalty programs available to them.

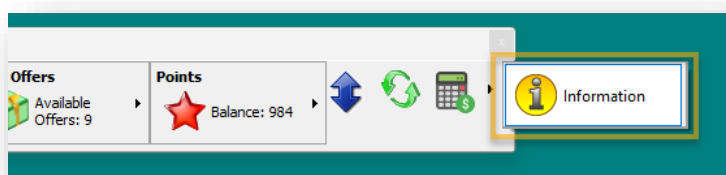
For Return receipts, this button temporarily changes to a Warning Notification to remind the cashier why the Frequent Buyer and Manufacturer Offers programs are inactive.

Calculate Discounts

This button was added to accommodate Promotional Discounts applied just before a receipt is tendered. We found that it overwrites the Astro Loyalty discounts that may have been applied as items were added to the receipt. If this is the case, click this button

Plugin Information

The last button is visible after clicking the fly-out arrow at the far end of the Astro Loyalty receipt menu which displays a circled "i" button; clicking it simply displays the name and version of the plugin.



Feedback

We have put a lot of work into this plugin and hope it enhances the check-out process for pet and feed stores using Astro Loyalty with Retail Pro 9. Please report any problems with this plugin or submit suggestions for improvement to support@corneliusconcepts.com.

Thank you!

About Cornelius Concepts

Cornelius Concepts, LLC is a software development company, based out of Portland, Oregon developing many types of applications, mobile apps, and web services. We are an authorized Retail Pro Development Partner, writing back-end integrations and plugins for a wide variety of retailers around the world since 2004.

Cornelius Concepts is available for online training and support of Retail Pro products we produce. We can also be available for remote troubleshooting of customer installations as needed.

Please see our website, <https://corneliusconcepts.com> for more information.

