

**Overview**

eFrequency is the new Radiant Hospitality Systems solution designed to provide single and multi-store organizations with management, reporting, and POS integration needed to support an electronic based frequent guest program.

This FAQ guide contains the following sections aimed toward answering questions on different tasks that might be performed from various personnel within your company:

- **eFrequency Glossary** – Includes commonly used terms with reference to the eFrequency system. (See pages 2 - 5.)
- **Getting Started with eFrequency** – Contains the “least you need to know” about eFrequency. (See pages 5 - 7.)
- **Setting up an eFrequency Card** – Includes questions and answers on setting up your magnetic strip cards that can be used for eFrequency. (See pages 8 - 10.)
- **Configuring your Stores for eFrequency** – Consists of questions and answers on customizing your eFrequency settings on your POS systems. (See pages 10 - 13.)
- **Gathering Member Information** – Contains questions and answers on gathering your eFrequency member information. (See pages 13 - 16.)
- **Creating and Implementing Your Bonus Plans** – Consists of questions and answers to help you design and create the bonus plans that will be used within your eFrequency rewards program. (See pages 16 - 25.)
- **Accessing Member Information** – Includes questions and answers for accessing your eFrequency rewards program’s member information once it’s stored in your company’s eFrequency database. (See pages 25 - 26.)
- **eFrequency Usage** – Contains questions and answers that cover various scenarios regarding the usage of eFrequency. (See pages 26 - 30.)
- **Internationalization** – Includes questions and answers regarding translation and multi-currency support within eFrequency. (See pages 30 - 31.)
- **Security and System Administration** – Consists of questions and answers with respect to the security features available for eFrequency. Aids you in being proactive in the event customers or in-store personnel try to “beat the system.” (See pages 31 – 32.)

**eFrequency Glossary**

To help you follow along with this FAQ, we suggest you familiarize yourself with the following terms. You will see these terms used throughout the eFrequency applications and supplemental documentation, so it is important to understand each of their definitions before getting started with eFrequency.

- **Back Office Machine** – The computer that resides at the store and administers the Aloha Manager application.
- **Bonus Plan** – Bonus plans are assigned to eFrequency card types and determine how your members will qualify for rewards. Each bonus plan has a user-specified name, a start and optional expiration date, a scheduling interval, plan type, reward type, reset date option, and optional bonus events.
- **Bonus Plan Event** – Bonus plan events allow a user-specified multiplier to increase credit earned for a bonus plan. You can schedule bonus events to occur at various times such as on one or more specified days of the week, during certain times of the day, on your members birthday, etc. Additionally, you can place qualifiers for the bonus event such as certain items that must be purchased in a specific revenue center, or within a specified order mode, etc. *Example:* A company that has very slow mid-day periods, can award double-value credit if members use their card during your Lunch day part.
- **Bonus Plan Reset Options** – Bonus plan-reset dates are used to re-initialize your member's credit earned for their bonus plans. The different reset options are to reset after your members receive their rewards, every year on a specified date, a specified number of days after members enroll in the bonus plan, a specified number of days after the bonus plan is implemented, or never reset.
- **Bonus Plan Reward Type** – Reward types determine what kind of reward your members will earn. The different reward types include Reward Voucher, Real-time Discounts, eCard Add Value, and Corporate-issued Rewards.
- **Bonus Plan Schedule** – Bonus plans can be scheduled to occur each day, all day, or only during specific dates/times. Additionally, you can place qualifiers for the bonus plan schedule such as any items purchased toward credit must be purchased in a particular revenue center or within a specific order mode. *Example:* You can create a bonus plan where members only earn credit during happy hour on Monday night in your bar revenue center.
- **Bonus Plan Type** – Bonus plan types are the method eFrequency uses to determine if the member associated with the POS guest check has qualified for a reward. Each bonus plan has a plan type associated with it. The different bonus plan types include a currency-based plan, an items-based plan, a frequency-based plan, a lottery style plan, and a points-based plan.
- **Credit** – Credit is what your members earn for their visit that qualifies for one or more bonus plans. Credit can be dollars spent, items ordered, number of visits, or points earned. *Example:* A member earning credit for a points based bonus plan would show the number of points earned. A member earning credit for items based plan would show the number of item ordered.
- **Corporate-issued Reward** – Corporate-issued reward types support the corporate office or a third party issuing the reward. This type of reward is used if the reward is not to be issued at the local store. In-store communication of reward (via a voucher) is optional.



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- **Currency-based Plan Type** – Currency-based plan types allow your members to earn rewards based on the currency amount spent on items within one or more specified categories. *Example:* Buy \$20.00 worth of items in the Appetizers category and receive a reward.
- **Data center** – Data center is the term used for a location that houses eFrequency data. The Enterprise data center is located at Level 3 Communications (<http://www.level3.com>), a world-renowned, highly secured data center. When the eFrequency data is sent from your stores it goes to the data center where all the processing takes place, and secures your data
- **End of Day (EOD)** – A process that runs on the back office workstation that closes out the sales for the date of business (DOB), archives the DOB, and starts a new DOB.
- **eCard** – eCard is a web-based, enterprise gift card solution offered by Radiant Hospitality Systems. Using the central data model, you can easily set up types of gift cards that can be purchased and redeemed in a group of stores or all of your stores. The gift card data is synchronized between your stores and the Enterprise data center, allowing you to generate a multitude of powerful reports relating to your customers gift card usage directly over the Internet.
- **eCard Add Value Reward** – This reward method allows a member to receive additional value added to their eCard once they reach the specified bonus plan level. This feature is only available to companies that are licensed for Aloha eCard. In addition, the member's card must be setup as both an eCard and an eFrequency card.
- **eFrequency Card Number** – The eFrequency card number is the number assigned to the member for identification. The card number can be an eCard or a card specifically created for the eFrequency program. The card must match the magnetic card specifications for the eCard program.
- **eFrequency Card Type** – The eFrequency card type is assigned to each member and determines the bonus plans in which the member can earn rewards. The eFrequency card type contains a user-defined name, description, card prefix, and one or more bonus plans.
- **Frequency-based Plan Type**– Frequency-based plan types allow your members to earn rewards based on the number of times they use their cards. *Example:* Use your eFrequency card 10 times and receive a reward.
- **Items-based Plan Type** – Items-based plan types allow your members to earn rewards based on the number of items purchased within one or more specified categories. *Example:* Buy 15 items within the Appetizers category and receive a reward.
- **Look-up List** –The server or cashier can search for members that contain similar profile information by using the look-up list on the POS. For example, if you have two members whose names are Andrew Prince, the look-up list can be used to view additional information such as their phone number, address, etc. This additional information ensures the proper member is being assigned to a guest check in order to earn credit.
- **Lottery Plan Type** – The lottery plan type allows members to earn rewards based on items ordered within one or more specified categories, supplying the member a chance to win a reward at random based on user-defined odds. *Example:* Buy an item within the Appetizers category and obtain a 1 in 20 chance of receiving a reward.
- **Member** – A Member is the customer or guest who has enrolled in your eFrequency program.

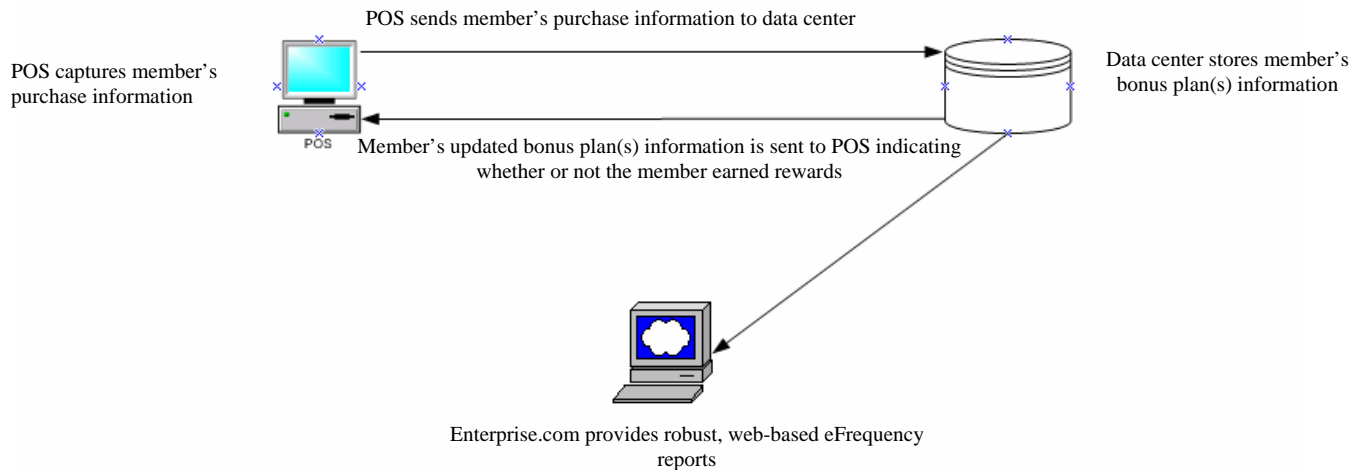


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- **Points-based Plan Type** – Points-based plan types allow your members to earn rewards based on the number of points they earned for the currency amount spent, or number of items purchased within one or more specified categories. *Example:* For every \$5.00 spent on items in the Appetizer and/or Dessert categories, earn one point. A reward will be issued once the member earns 20 points.
- **Profile Data** – Profile data is information collected on your members. Profile data includes, but is not limited to the member name, address, phone number, email address, and customized profile information.
- **Qualifier** – A qualifier determines the criteria that must be met for your members' eligibility to earn credit toward rewards. Examples of qualifiers are the items that must be purchased, the time of day the eFrequency card must be used, etc.
- **Real-time Discount** – Real-time discount reward types support applying a promotion or comp on the POS guest check when the member earns the reward.
- **Reward Voucher** – The Reward Voucher reward type is a custom-defined text-based message that describes the reward to the member. This reward voucher is printed separately from the guest check.
- **Sign-up Voucher** – A sign-up voucher is an optional voucher (separate from the guest check) that prints at the POS when your members first use their eFrequency cards. You can customize the voucher to include the profile data you want to capture from your members such as their name, email address, phone number, etc.
- **Virtual Environment** – A virtual environment is the connection description at the store. eFrequency is offered only in a virtual environment. The store connects to the data center for each eFrequency transaction. This differs from eCard, where local stores can house eCard data and synchronize the data with the central site periodically throughout the day.

### How it Works

To help you gain an understanding of the fundamental flow of events for eFrequency, the following diagram depicts a basic, high-level view of how data is communicated between the POS and the Enterprise data center.



### Getting Started with eFrequency

#### 1. What is eFrequency?

eFrequency is a web-enabled back-office system that empowers operators to manage their customer relations management (CRM) programs from their corporate office, and reward or recognize their loyalty program members in a variety of ways, such as real-time discounts applied directly to the guest check or a coupon to be used during the member's next visit. As a sister-product to eCard, eFrequency empowers operators to immediately turn gift cardholders into eFrequency members so that the member's gift card and eFrequency card are the same.

#### 2. What are the types of restaurants for which eFrequency is intended?

eFrequency is designed for quick service concepts such as coffee shops, sandwich shops, etc. as well as fine-dining establishments such as elite steakhouses. During the design phase of eFrequency, Radiant Hospitality Systems gathered input from virtually every type of restaurant concepts including enterprises with more than 400 stores to small companies with fewer than three sites.

#### 3. Will I need a POS version upgrade in order to use eFrequency?

The required POS version to run eFrequency is 5.3.12. The HASP key must be licensed for 5.3 in order to support this version of the POS.

#### 4. What are the start up costs and ongoing costs for eFrequency?

eFrequency is priced very similar to eCard, meaning there is a flat, monthly fee, based on the number of stores your company has licensed for eFrequency. There is also a one-time

activation fee per store. For pricing information, please contact your Radiant Hospitality Systems Sales Representative.

**5. What are the basic steps that need to be performed in order to roll out eFrequency for my company?**

The first thing you will need to do is ensure that each store that will be using eFrequency are installed with the new POS version (5.3.12). If you do not currently have the minimum POS version at your locations, you will need to plan a rollout strategy for implementing this new version.

From your Enterprise.com site, you will need to setup each store and license them for eFrequency. You can easily license your stores online using the Site Setup application, which is available from your company's Enterprise.com web site.

If your stores are not currently licensed for the Enterprise.com or eCard offerings, you will need to ensure that each store is properly set up on your company's Enterprise.com web site. The information for setting up your stores will be automatically emailed to you when you sign up for the service, or you can obtain the information from the Enterprise.com Help system.

Once your stores are set up on your Enterprise.com web site, our support technicians will install the eFrequency components on the back-office computer at each store. This is a very stealth process in which our technicians dial into the stores via PC anywhere and quickly install the components—without interrupting daily operations. You should allow 2-3 weeks from the time you license eFrequency to the actual installation at the POS.

While your stores are in queue to be installed for eFrequency, you'll need to perform a few tasks on your Enterprise.com site that will allow you to immediately rollout your company's reward program after the eFrequency software is installed. This consists of the following:

- *Customize the eFrequency POS Settings* – One of the first steps is to customize the eFrequency environment for your stores. These are optional features that allow you to define certain business rules such as what member information is gathered, if and how members can use alternate forms of ID to earn credit for visiting your stores, security settings, etc. This task can be performed anywhere, anytime you have access to your Enterprise.com web site and the application used to configure these setting. Customizing this POS information is detailed in the *Configuring your Stores for eFrequency* section on page 10.
- *Create your Bonus Plan(s)* – Another step is to create the bonus plan(s) your company will be implementing. Imagination is the key here, and you'll find that the eFrequency Bonus Plan Setup application provides you a plethora of options to go with your most imaginative loyalty programs. Bonus plans are detailed in the *Creating and Implementing your Bonus Plans* section on page 16.
- *Set up your magnetic strip cards for eFrequency* – After creating your bonus plans, you can add eFrequency functionality to an existing eCard card type. If your company does not utilize the eCard software, you'll need to order your new magnetic strip cards and configure them for eFrequency. Adding eFrequency functionality is simple and can be performed from your company's Enterprise.com web site in a matter of minutes. Setting up your cards is detailed in the *Setting up an eFrequency Card* section on page 7.

**6. Can we continue to use our existing Aloha Frequent Buyer system in addition to eFrequency as we roll eFrequency to our POS systems?**

Yes! eFrequency does not impact the Aloha Frequent Buyer product in anyway. However, if you are running both applications, each application will have its own configuration and databases. Meaning, you will have to maintain the two applications separately – eFrequency is maintained from the Enterprise.com website and Frequent Buyer is maintained from the stores Back Office workstation. Therefore, all member information and history will be stored in two separate databases.

**7. Can I convert my existing Aloha Frequent Buyer customers to eFrequency members?**

Yes and no. Yes, you can supply Radiant Hospitality Systems with your current Aloha Frequent Buyer customers' profile information your company has collected (name, address, etc.). If you would like to import your existing member's profile information, please open a support incident from your Enterprise.com website and request the eFrequency Member Import file. Our support engineers will email you an Excel spreadsheet. Once you send the Excel spreadsheet back, it will be imported into your company's eFrequency database. However, your Aloha Frequent Buyer customer history (earned credit, reward status, purchase history, etc.) cannot be imported into your company's eFrequency database. Optionally, you can manually add existing Aloha Frequent Buyer profile data via the eFrequency Member application, which is part of the eFrequency solution.

**8. Does eFrequency work like my eCard system in that eFrequency information can be cached at the store and synchronized with the data center at specified intervals?**

No. eFrequency utilizes a virtual environment, meaning each time your eFrequency members are "assigned" to a guest check or an eFrequency report is generated at the POS, the store will connect to the data center to obtain and process the applicable information. This means your eFrequency system is always running in real-time.

**9. If I have additional questions after reading this FAQ, whom should I contact?**

If your questions are relative to pricing, you should contact your Radiant Hospitality Systems sales representative. If your questions deal with functionality or prerequisites for eFrequency, please contact your reseller or open a support incident on your Enterprise.com website.

**10. What are the database requirements for utilizing the eFrequency application among multiple stores?**

You will need to ensure that you are utilizing a "master database", which has all items that your stores use. A master database assumes that an item ID represents a single item across all stores. For example, Item 50 cannot be Coca-cola at one store, and Chicken Fried Steak at another stores.



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**Setting up an eFrequency Card****1. What kind of magnetic stripe cards work with eFrequency?**

Radiant's preferred card vendor is the exclusive card vendor for eFrequency. All cards must be purchased from the preferred vendor. Contact your reseller or Radiant Hospitality Systems representative for pricing and to place the order for cards.

**2. Can my customers use their existing eCards for eFrequency purposes?**

Yes! One of the key features to eFrequency is that your most loyal customers—those that use eCard and also want to enroll in your company's eFrequency program—can carry a single card into your stores, using it both as a gift card and to earn credit for their purchases.

**3. How do I include eFrequency functionality to my existing eCards?**

Our powerful, easy-to-use Card Setup application allows you to quickly add eFrequency functionality to your existing eCards literally by a click of your mouse! You simply set the card to be an eFrequency card in the Card Setup wizard, and then define the business rules you want implemented with the card type.

**4. Can I create two separate card types? One for eCard only and one for eFrequency only?**

Yes. If you would like to have a card that is separate from your eCards, you can define a new card type that holds eFrequency only functionality. To perform this you'll need to purchase new cards from Radiant's preferred card vendor with a prefix that differs from your existing eCards. Once you receive the cards it's a matter of simply configuring the card for eFrequency on your Enterprise.com website.

**5. Am I limited to the number of eFrequency card types I can create?**

No. Just like our eCard solution, you can create as many different eFrequency card types that are desired by your company. Each card, however, will need a unique five-digit prefix number that defines the rules associated for the card.

**6. What if I add eFrequency functionality to an existing eCard, but later change my mind and decide to use a separate card for my eFrequency program?**

As long as no one has started using the original card for eFrequency purposes, you can modify the card type by removing the eFrequency functionality. Removing eFrequency from the card deactivates the eFrequency functionality, and you will have customers in the field expecting to use the card for that purpose. Our system can detect whether or not any of your customers have used the card for eFrequency purposes, and will disable the feature that removes eFrequency once the card type is used for eFrequency. Of course you can always change the eFrequency business rules associated with the card (add/remove bonus plans, etc.) at anytime regardless if the card is currently in use or not.

**7. Can I create a single card type that can be used only as an eCard in certain stores and only as an eFrequency card in others?**

No. Because the stores that can honor the card are defined by card type, any store that can sell and redeem an eCard will also be able to honor eFrequency and vice-versa.



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**8. What happens when my eCard cardholders use their cards for the first time following the eFrequency activation?**

Once you have set up a card type to include eFrequency, our system that card type as an eFrequency card. Before swiping the card (or manually entering the number) the cashier or server touches a button that instructs the system to assign that member to the guest check. The system then checks to see if the member already exists in your company's eFrequency database. If the member isn't found, the system adds the member to the eFrequency database. The member can still earn credit for that visit. In addition to this, the system can determine whether or not the member's profile information is stored in the database, and if it's not, automatically print a custom "sign-up voucher" that the member can use to enter his or her profile information. For detailed information on gathering your member's profile information, please refer to the *Gathering Member Information* section on page 13.

**9. How many bonus plans can I include on my eFrequency cards?**

A great feature with eFrequency is that you can have an unlimited number of bonus plans associated with a single eFrequency card. Bonus plans are the crux of your eFrequency program and determine how members can earn rewards. For example, you can add three bonus plans to a single card. One bonus plan allows members to earn rewards on Monday night based on the items they order. Another bonus plan allows members to earn rewards based on the dollar amount they spend during your lunch day part, and the third bonus plan allows members to earn rewards every fifth visit to your stores. This is a very flexible, cost-effective means of implementing your eFrequency program. For detailed information on bonus plans, please refer to the *Creating and Implementing Bonus Plans* section on page 16.

**10. How many connections are initiated to the data center if my customers want to pay by redeeming their eCard—and still earn eFrequency credit for their purchases—using the same card?**

Only one connection is needed! The cashier or server simply selects the eCard tender button on the POS and swipes the card (or manually enters the card number). At this point, the system checks to see if the card contains eFrequency functionality, and if it does, communicates the necessary information to the data center, while redeeming the eCard at the same time.

**11. Using the scenario above, if the member did not qualify for eFrequency credit, or was not found in the database, will the eCard redemption still take place?**

Yes. Even if the member does not qualify for credit and has not yet provided profile information, the eCard redemption will still process appropriately.

**12. If I have both eCard and eFrequency defined on a single card type, does my eCard now utilize a "virtual environment" like eFrequency?**

No. Even though eFrequency utilizes a virtual environment, if you are currently storing eCard information at the local stores and synchronizing that data with our data center at specified intervals, using a single card that includes both eCard and eFrequency will not affect your current eCard settings at the store. This means that the in-store eCard caching rules still apply.

**13. Will eCard redemptions prior to my customers becoming eFrequency members count toward bonus plan credit?**

No. Only purchases that occur after your customers become eFrequency members (upon first using their eCard/eFrequency card) will count toward their bonus plan credit.

**Configuring your Stores for eFrequency****1. Can I customize the eFrequency POS settings for my company?**

Yes. You can configure POS settings from your Enterprise.com website by using the eFrequency Configuration wizard. This wizard allows users with access to configuration information for the POS such as the POS prompts and button text in-store personnel will see when assigning members to checks. Generally this configuration setup is a one-time event that occurs before eFrequency is deployed to the stores.

**2. What if one or more of my stores' eFrequency POS settings need to differ from the rest of my sites?**

You can easily specify the default environment for specific stores that differ from the company settings through the eFrequency Configuration application. This wizard allows you to override the settings for stores that do not match the default company settings. For example, if you have one more stores that require eFrequency button text that differs from the rest of your stores', you can override the company eFrequency button text for those stores.

**3. What if someone at my QuickService locations changes the button text used to assign members to guest checks? Is there any way to prevent this?**

Because the button text for assigning members in QuickService is configurable via the Panel Editor, the Store Configuration application will not set or override the button text used to assign members.

**4. Do my members need to present their eFrequency card to earn credit or can they use another form of ID so the system can recognize them as members?**

Yes! You can configure all or specific stores to allow members to present an alternate form of ID (such as their name, driver's license number, etc.) in order to receive credit for their purchases.

**5. What forms of alternate IDs can my members use to earn eFrequency credit at my stores?**

This is entirely up to your company. eFrequency provides you with a comprehensive list of profile data you can gather from your members, which is then stored in your company's eFrequency database. This includes data such as your members' birthdays, first/last names, addresses, etc. A key feature is that YOU decide which forms of alternate identification your members can use to earn credit. For example, your company can specify that your member's can only be assigned to a guest check by either presenting their card or their phone number.

**6. What if there is certain profile data I want to gather from my members that's custom to my company? Can I gather this and store it in our eFrequency database?**

Absolutely! We understand that each company desires data that is unique to their company such as their members' favorite bottles of wine, favorite entrées, etc. eFrequency addresses this by allowing you to define up to five custom profile fields that can be used to gather company-specific information from your members.

**7. What about duplicate member profile data? How will we know the member being assigned to the guest check is the correct member?**

You choose the following with respect to your member data:

- *The member data you want to collect*
- *The member data that can be used as alternate IDs*
- *The member data that is returned to the POS*

These options allow you to ascertain additional member information in the event two or more members have the same alternate IDs when assigning them to guest checks. For example, you have configured eFrequency to allow members to be assigned to guest checks by using their first and/or last names. John Smith comes into the restaurant and uses his last name as a form of ID. Upon querying your eFrequency database, it's determined that there are three John Smith's enrolled in your program. eFrequency will send all of the profile data you've configured to return to the POS when looking up members via alternate IDs. This data might be phone number, driver's license number, and address. The data will display to the server or cashier in a "look-up list". In this example, the server cashier can then ask the member for their phone number, address, or driver's license number to ensure it is the correct John Smith. You can configure the system to allow any number of alternate IDs as well as return any profile fields to ensure the correct member is being assigned to the guest check.

**8. I have concerns about displaying our members' credit card numbers and Social Security numbers to my in-store personnel. How does eFrequency address this?**

The Store Configuration application provides you with masking options for member data returned during an alternate ID lookup. You can partially mask the following:

- *Social Security numbers*
- *Credit card numbers*
- *Drivers License numbers*
- *eFrequency card numbers*

This information will also be masked on all eFrequency reports, ensuring that the integrity of your members' personal information is not jeopardized.

**9. What if I don't want my members to use alternate IDs as a means of earning eFrequency credit?**

eFrequency allows you to configure whether or not you want to allow your members to use alternate IDs. If you elect to disallow your members from using alternate IDs, they must have their card (or card number) in order to be assigned to a guest check. As an additional option, you can configure eFrequency so that only members with their cards in hand can earn credit by requiring the card to be swiped through the POS magnetic card reader.

**10. Can I configure my POS systems to print member information on guest checks?**

Yes! Using the powerful eFrequency Configuration application, you decide the information will print on your members' guest checks. This includes any combination or all of the following:

- *Member Name* – Prints the member's first and/or last name.
- *Card Type* – Prints the card name that you defined in the Card Setup application.
- *Card Number* – Prints the member's eFrequency card number.
- *Credit Earned for Current Visit* – Prints the credit the member earned on that visit for any of the bonus plans in which your members are enrolled. For example: Points Earned for *Business Person's Lunch*: 15 points.
- *Credit Balance for Affected Bonus Plans* – Prints the current credit balance for any of the bonus plans in which the member earned credit on that check. For example: Current Balance for *Business Person's Lunch*: 55 points.
- *Credit Balance for All Bonus Plans* – Prints the current credit balance for all bonus plans in which he or she is enrolled, regardless of whether or not they earned credit during that visit. This is a great way to "remind" your members of the bonus plans in which they enrolled as a means of enticing them to visit your stores to earn credit for other bonus plans. For example: Current Balance for *Business Person's Lunch*: 55 points. Current Balance for *World Beer Tour*: 12 items.

**11. Can the same member information that's printed on guest checks also display on the POS' on-screen check display?**

Absolutely. The same options you choose to print on your members' guest checks will also display to the server or cashier on the POS' on-screen check display.

**12. Where on the guest checks will member information print?**

The member information will print between the check item detail and the tender information.

**13. Can I limit the number of rewards that my members can earn on a single guest check?**

Absolutely! Because a member can enroll in an unlimited number of bonus plans using a single card, there is the possibility of a member earning a multitude of rewards on a single transaction. eFrequency addresses this by allowing you to place a threshold that determines the number of rewards a member can earn on a single check. Better yet, you can define *which* rewards the member will receive in the event the number meets or exceeds the defined threshold, and even optionally "queue" or save the other rewards to be automatically issued the next time members visit your stores.

**14. After making changes to my stores' POS settings in the eFrequency Configuration application, when can I expect the updates to be implemented at the store?**

The eFrequency Configuration application is synchronized with the stores licensed for eFrequency every 24 hours.

**15. Do I need to refresh my terminals so they can receive the updated configuration?**

No. The first time a member is successfully assigned to a guest check after receiving the new settings, all terminals will automatically update with the new information.

**Gathering Member Information****1. What are the options for gathering our members' profile information?**

There are a variety of ways to gather your members profile information. One method is to purchase pre-printed sign-up forms along with your eFrequency cards. These forms can contain the card number along with its attached magnetic stripe card. For cards that have already been distributed to your customers (i.e. eCards), you can purchase pre-printed sign-up forms that do not contain card numbers.

eFrequency also provides you with a cost-effective means of providing your members with sign-up material in the form of a fully customizable "sign-up voucher" that prints at the POS.

**2. How can the eFrequency system create a sign-up voucher for my prospective members?**

You can configure the system to print a sign-up voucher when a member first uses his or her card. The system knows when a card is first being used for eFrequency purposes, and the POS will automatically print the sign-up voucher during that transaction. This is a voucher that is separate from the POS guest check. The sign-up voucher is fully customizable, allowing you to request any of the available profile data that can be stored in your company's eFrequency database.

**3. Can sign-up vouchers be associated with an existing card type that contains eCard functionality?**

Yes. If you add eFrequency functionality to an existing eCard type, upon your members first using that card for eFrequency purposes, the system will print the defined sign-up voucher.

**4. What if the server or cashier loses the sign-up voucher and the member never gets entered into our eFrequency database.**

The eFrequency Configuration application has an additional option in which the system will print the sign-up voucher in the event a member's profile information is not found in your company's eFrequency database. This is different than the "one-time" sign up voucher that prints the first time the card is used. When using this option, the system will check if the member's profile in the database contains any other profile information other than the card number. If only the member's card number is in the database, another sign-up voucher will print.

**5. Can I define font settings for my eFrequency sign-up vouchers?**

Yes. You can define certain font settings such as large font, justification, bold, etc. This is performed very easily by simply selecting the font setting you desire to incorporate while you are defining the sign-up voucher.

**6. What if one or more of my printers does not support the font settings I included in a sign-up voucher? Will the voucher still print?**

The printer on which the sign-up voucher is being printed must support the included font settings for the sign-up voucher. For example, if you create your sign-up voucher to include the font to be centered rather than left justified, and a printer at one of your stores does not support printing in centered text, the sign-up voucher will print per the printer's default settings at that store.

**7. Can the member profile information be entered directly into the POS so I don't have to enter member profile information via the Internet?**

No. During the design of eFrequency, the overwhelming number of customers we consulted with did not see a need for in-store personnel to enter member information directly in the POS system. The reasons include additional hardware needed at the POS, efficiency of entering member data, the integrity of the data entered, etc. However, the Member Setup application allows you (or anyone with access) to log on to the Internet and add member profile data at anytime. This can be an in-store manager—who perhaps enters all new members at the end of his or her shift—or someone at the corporate office who receives the sign-up vouchers or pre-printed forms.

**8. Once I obtain member information, how is that data stored in our company's eFrequency database?**

There are two ways to store your members' profile data into your company's eFrequency database:

- *Import Member Data from an External File Source* –Your company (or an outsourced data-entry company) can enter member data into our Member Import Spreadsheet provided by the Enterprise support team.
- *Use the Member Setup Application* – Anyone within your company with access to the Internet and your company's Enterprise.com web site can directly enter member profile information over the Internet using eFrequency's powerful Member Setup application. Your company defines who has access to this application as well as what functions they can perform within the application.

**9. How often can I send you files for import? Is there any additional cost for importing this information into our database**

You can send us the Member Import spreadsheet as often as needed and we will import the information into your eFrequency database within two business days. There is no additional cost for importing member information as this is considered part of the eFrequency service.

**10. I'd like to enter the member information in the Member Setup, but only want to gather a few profile fields. Is there a fast way around this?**

Yes. The eFrequency Configuration application allows you to define which member profile data you will be gathering, and disable all the other fields. This aids in rapid entry because the person entering the data in the Member Setup application can quickly tab only to those text boxes he or she needs to enter data. For example, if your company only wants to gather member names, phone numbers, and addresses, all other data entry fields on the Member Setup application will be disabled. The person entering the data can quickly tab to the name field, then the phone number field, then the address field, bypassing the unnecessary data fields (such as credit card number, company name, etc.).

**11. What member profile information can I store in my company's eFrequency database?**

The following table lists the member profile fields that can be either imported into your eFrequency database (via an Excel spreadsheet), or entered directly via the Member Setup application.

Anniversary Date	Birth Date	Card Number	Card Type
Credit Card Number	Driver's License Number	Email Address	First Name
Phone Number	Other Phone Number	Phone Number	Social Security Number
Street 2	Zip code	Company Defined Profile Information	

**12. Can one member have multiple cards assigned to a single profile? For example, for families?**

No. Within eFrequency, there is a one-to-one relationship between reward status and a card number. This means that credit earned on one card is only applied for that profile, and multiple cards cannot accrue credit for a single profile.

**13. How will I know if my member's profile data is NOT being entered into our eFrequency database?**

The Member Setup application let's you view members associated with a range of card numbers. You can periodically check for a range of card number and determine if profile information has been associated with it or not. This information will also inform you when the card was last used, reward status etc.

**14. Can members use their card before their member profile information is added to our company's eFrequency database?**

Absolutely! As long as a member has a valid eFrequency card, they can earn reward credit regardless of whether their profile information has been added to your company's eFrequency database or not. In fact, there is no requirement that your company ever has to capture your members' profile information.

### Creating and Implementing Bonus Plans

#### 1. What are bonus plans?

Bonus plans define the means in which your members can earn credit for receiving rewards. An example of a bonus plan would be “Buy 10 Coffee’s in One Week and Receive a Free Muffin”. In this example, you define the business rules for the bonus plan. I.e., What items the member must purchase to qualify for the bonus plan (coffee); the number of items the member must purchase to earn the reward (10); what the reward will be (one free muffin), and how long the member has to earn the reward (one week) before their credit is reset (reset plan every 7 days).

#### 2. What types of bonus plans can I create?

There are five types of bonus plans:

1. Currency-based - A currency-based bonus plan is one in which your members earn rewards based on the amount of money they spend at your stores. For example, you can create a bonus plan that rewards your customers for every \$20.00 they spend.
2. Frequency-based - A frequency-based bonus plan is one in which your members earn rewards based on the number of times they visit your stores. For example, you can create a bonus plans that rewards your members every 10<sup>th</sup> time they use their eFrequency card at any of your stores. Or the plan can be based on a special occasion such as the Members Birthday, Anniversary, or Sign-up date. For example, you can create a bonus plan that rewards your members on the birthday.
3. Items-based - An items-based bonus plan is one in which your members earn rewards based on the number of items they purchase at your stores. For example, you can create a bonus plan that rewards your members every 10<sup>th</sup> beer they purchase at your stores.
4. Lottery - A lottery plan is a unique plan in that it allows your company to set the “odds” for which your members have a chance to receive a reward simply by using their cards at your stores. For example, you can create a lottery bonus plan that gives your members have a 1 in 10 chance of winning a free coffee each time they visit your store, or perhaps they have a 1-500 chance of winning \$100.00 added to their eCard.
5. Points-based - A points-based bonus plan is one in which your members earn points based on items purchased or dollars spent at your stores. For example, you can create a bonus plan rewards your members 25 points for every \$5.00 they spend at your stores. Member points can then be redeemed for various rewards.

#### 3. Can I define when my bonus plans start and end?

Yes. All bonus plans can include a starting and ending date. This is ideal for bonus plans that are seasonal such as a holiday season promotion.

#### 4. Can I qualify the items members must purchase to earn credit toward their rewards?

Yes. The Bonus Plan application allows you to specify which category of items your members must purchase in order for them to earn credit. This can be for one or more categories. For example, you can create a bonus plan that only awards members if they order any item from your appetizers and/or desert categories.

**5. Can I specify which items within a specific category that members must purchase to earn credit toward their rewards?**

No. Item qualification for member credit is at the category level. If you would like to qualify one or more specific items (excluding the other items in its category), you can create a new category using the Enterprise.com Category Wizard for those specific items and use that as the category qualifier.

**6. Can I specify whether or not discounted items that are purchased by members will count toward their reward?**

Yes. You have the option of specifying whether or not items that have a comp or promotion applied to them will count toward your members' rewards. If you do decide to allow discounted items to count toward rewards, you have a further option of specifying whether or not the earned credit should be based on the item price before or after the promotion or comp was applied.

**7. What about modifiers? Do they count toward rewards?**

This is up to your company. You have the option of specifying whether or not items that are ordered as modifiers will count toward your members' rewards.

**8. Can I specify whether or not an item purchased by members will only count once toward their reward on that visit, and not on future visits?**

Yes. Your members can earn credit each time they purchase an eligible item (even if it's the same item), or you can specify that the item purchase will only count once toward their reward. This is ideal for companies wanting to encourage their members to purchase different items in efforts to receive their reward.

**9. Can my members automatically earn rewards on special occasions such as their birthday?**

Yes. Using the frequency-based plan type, you can configure the system to give your members' rewards on their birthday, wedding anniversary, or the date they enrolled in your bonus plan. Birthdays and wedding anniversaries are dependant on whether that specific profile data is stored on your company's eFrequency database. In other words, if a member has not supplied you with his or her birthday, the system cannot detect when the birthday is, thus that member will not receive the reward.

**10. Do my members need to come in on their birthday to receive the "special occasion" reward?**

This is up to you. You can configure eFrequency to only present the reward on the specific special occasion date, during the week of the special occasion, or during the month of the special occasion.

**11. If I select to allow my members to receive a reward on the week of their birthday, will they receive a reward each time they use their card at my stores that week?**

No. The member will only receive the special occasion reward once. For example, if you have a member whose birthday is June 1<sup>st</sup>, eFrequency will grant the member his reward the first time he visits one of your stores during the week of June 1<sup>st</sup>.

**12. Can I define the number of points my members will earn based on the amount of dollars they spend or number of items they purchase?**

Yes. The Bonus Plan application allows you to specify whether members earn points based either on the amount of money they spend or the number of items they purchase at your stores. For example, you can create a bonus plan that rewards members one point for every dollar they spend, or create a plan that rewards them 3 points for every 3 items they purchase.

**13. How can my members find out how many points they have accrued?**

Members can get their current standing while visiting any of your stores. The server or cashier can quickly generate a "Member Report" directly from the POS. This information is available for all plan types. You can also elect to print an updated total standing for the member directly on the member guest check. This way, the member gets an up-to-date balance each time he or she uses their eFrequency card.

**14. How do my members redeem their points for rewards?**

Companies can use either the Member History application, which allows you to manually deduct points from a member's bonus plan. The system does not currently support the member automatically selecting a reward for which they would like to redeem their points.

**15. Can points accrued from two points-based bonus plans go toward one reward threshold?**

Yes. The Bonus Plan application allows you to link multiple points-based plans together. This allows members to accrue points for items purchased or dollars spent differently. For Example, you can create a bonus plan that rewards member's one point for every one entree, and link that plan to another bonus plan that rewards them 3 points for every 3 beverages and desserts they purchase. This allows members to accrue more points for beverages and desserts differently

**16. What types of rewards are available with eFrequency?**

The Bonus Plan application provides you with four powerful reward types:

- *Corporate-issued* – Used when the corporate office or a third party will be issuing the reward. This type of reward is used if the reward is not to be issued at the local store. For example, you can create a bonus plan that rewards users with a leather jacket. The jacket would be distributed from the corporate office or third party vendor.
- *eCard Add Value* – Used to add value to members' eCards balance. For example, you can create a bonus plan that rewards members by depositing \$10.00 to their eCard for every \$100.00 they spend at your stores. The eCard Add Value reward is only available for companies who are licensed for eCards.
- *Real-time Discount* – Used to instantly apply a POS promotion or comp to a members guest check. For example, you can create a bonus plan that reduces the members' guest check by 10 percent every 5<sup>th</sup> time they use their eFrequency cards at your stores.
- *Reward Voucher* – Used to print a voucher at the store (separate from the guest check) that members can redeem upon their next visit to your stores. For example, you can create a bonus plan that rewards member with a voucher for a free coffee the next time they visit one of your stores.

**17. How does a real-time discount reward work? Does it act like a regular comp or promotion?**

Yes. When you are setting up your real-time discount, you first select whether the discount applied to the guest check will be a comp or a promotion. Next, you select the applicable comp or promotion to apply. Last, you would specify the discount amount and which items are eligible to be discounted. The comps and promotions for which you can choose are the existing eFrequency comps/promotions you have defined in Aloha Manager at your stores.

**18. What types of comps and promotions are supported with real-time discounts?**

eFrequency promotions can be defined in Aloha Manager as New Price discounts.  
eFrequency comps can be defined in Aloha Manager as a percent off or dollar off discount.

**19. Can I select the specific items to discount on the guest check when a real-time discount is issued?**

No. With the initial release of eFrequency, when a real-time discount is applied to a guest check, the POS will apply the discounted amount across all eligible items on the check. For example, if there are three soft drinks on a check, and one of them is to be discounted, the POS will report the discount evenly across all three soft drinks (not on a specific soft drink). A future release of eFrequency will allow you to select the specific item to be discounted when using the real-time discount reward type. However, you can limit the eligible items for the real-time discount to a specified category of items. For example, if you did not want the discount to be applied to all beverages on the check, you could create a beverage category, limiting the discount to be applied only to items in that category.

**20. What can cause a real-time discount to be rejected at the POS?**

Any business rule associated with a comp or promotion that is violated will cause the real-time discount to be rejected at the store. For example, if the comp or promotion ID does not exist in the local store database, the POS cannot apply the eFrequency real-time discount.

**21. How will the server/cashier know if a real-time discount is rejected?**

There will be no onscreen or guest check messages that tell a server/cashier that a real-time discount has been rejected because in most cases, the POS user would not be able to take any corrective action. Any real-time rewards that are rejected will be reported on Enterprise in eFrequency reports.

**22. If a real-time discount is rejected due to business rules associated with the comp or promotion, will my members simply lose that reward?**

Your company can define whether or not members lose real-time discount rewards that are rejected at the POS. You can configure eFrequency to “queue” or save real-time rewards that are rejected by the POS for future visits made by the member. For example, if a real-time discount of \$5.00 is rejected at the POS, the reward is placed in a queue. The next time the member uses his or her card at any or your stores, eFrequency will automatically apply the comp or promotion to the guest check (assuming it does not violate any business rules associated with the comp or promotion).

If you elect not to queue rejected real-time discounts, eFrequency will disregard them and the reward will not be valid again until the member reaches the defined threshold for that reward. For example, if a member is enrolled in a bonus plan that gives them a 10 percent discount on every fifth visit, and a real-time discount is rejected, the member will not receive the reward until his next fifth visit (assuming it isn't rejected again).

**23. How will my members know if they have received a real-time discount?**

The discount your members receive will display on the guest check. Optionally, you can configure eFrequency to print a customized voucher that informs the user they have received the discount. For example, upon receiving a real-time discount, the POS can print a voucher that reads, “Congratulations, John. You have just received a \$5.00 discount off your check!”

**24. Are there any reporting issues I should be aware of using real-time discounts?**

No. There should be no discrepancies in the comp/promotions amount reported on the POS and on Enterprise.com.

**25. What if the comp/promotion amount is greater than the guest check total? Will the check have a negative balance?**

No. eFrequency will not apply a real-time discount to a guest check if the check total is not equal to or greater than the comp/promotion amount. For example, if the check amount is \$8.00, but the member receives a real-time discount for \$10.00 off, the real-time discount would not be applied to the check, and if your company supports the queued reward feature, the reward will be queued for a future visit. If your company does not support queued rewards, the real-time discount would be disregarded.

**26. How does the eCard Add Value reward work?**

If your stores are licensed for eCard, members who possess a combination eCard/eFrequency card can earn rewards that add value to their eCard balance. Using the Bonus Plan application, you define the threshold members must meet or exceed to receive the reward, and identify the dollar amount that is added upon receiving the reward. When



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your members receive the reward, eFrequency deposits the defined amount to their eCard balance.

**27. Does the eCard Add Value reward amount need to be in whole dollars?**

No. You can configure eFrequency to add any dollars and cents amount, such as \$10.50, or even just .50 cents.

**28. Which store gets charged for the eCard Add Value reward amount?**

When setting up the bonus plan that rewards an eCard Add Value, you choose whether you want the store in which the reward was earned to be charged with the deposit, or you can select a specific store that will be charged for the eCard add value. The latter option is ideal for companies to charge a corporate store with the eCard reward because the store where the reward was earned did not receive the money for the added value.

**29. If the eCard Add Value reward is charged to the store where the reward was earned, will that store's Daily Sales Report be affected?**

No. The Daily Sales Report will not reflect the add value amount because the store did not receive money for the add value. The eCard Sales report will report the add value at the selected store and affects the Enterprise eCard reporting the same as if a manual adjustment was made that increased the eCard balance.

**30. Does the store for which the eCard Add Value reward is being charged need to be licensed for eCard?**

Yes. The store that is being charged for the eCard Add Value deposit must be licensed for eCard.

**31. Can a member earn an eCard Add Value reward at a store not licensed for eCard as long as the add value amount is charged to a store that is licensed for eCard?**

No. Both the store that awards the eCard Add Value reward and the store that is charged for the add value reward must be licensed for eCard.

**32. Will my members know when they've earned an eCard Add Value reward?**

Yes! Whenever your members earn an eCard Add Value reward, you can choose to have eFrequency print a voucher that notifies them of the reward. This voucher is separate from POS guest check and is fully customizable.

**33. How do reward vouchers work? Can I customize reward vouchers?**

You can define bonus plans that reward your members with a voucher that prints at the POS upon earning the reward. The voucher is separate from the POS guest check and is fully customizable. When creating the voucher, you simply enter the text that should appear on the voucher. For example, "Congratulations, John. You have purchased your 10<sup>th</sup> coffee. Present this voucher on your next visit to any of our stores and receive a FREE muffin."

eFrequency offers keywords that dynamically render data stored in your company's eFrequency database onto the voucher. An example of this is a member's first name. Using keywords, you can render member names into the voucher using the %MemberFirstName% keyword. You would enter the voucher text as: "Congratulations %MemberFirstName%. You have just received . . ." When a member earns a reward, the voucher prints the member's first name where you placed the %MemberFirstName% keyword. For example, "Congratulations, John." In order to achieve this however, the member's first name must be stored in your company's eFrequency database. Other examples of keywords include the

bonus plan's name, the amount of credit still needed to earn a reward for the bonus plan, etc. There are over 60 keywords for which you can choose to completely customize your reward vouchers!

**34. What if I use a keyword in my voucher text such as %MemberFirstName% and a voucher prints for a member whose first name is not stored in our company's eFrequency database?**

Some keywords might not contain values—such as those that render member profile information. If you include a keyword for which eFrequency cannot find a value, the system will default to a pre-defined value for that keyword. Using the %MemberFirstName% keyword as an example, if a member's first name was not stored in your company's eFrequency database, the system will default to "Valued guest".

**35. Can I utilize multiple reward levels within a single bonus plan?**

Yes. The currency, items, frequency, and points-based bonus plans allow you to define an unlimited number of reward levels so that members can earn different rewards based on various thresholds. For example, you can create a frequency-based bonus plan with three reward levels. The first level rewards users with a 5 percent discount after their 10<sup>th</sup> visit. The second level rewards them with a 20 percent discount after their 15<sup>th</sup> visit, and the third level rewards them with a 50 percent discount after their 75<sup>th</sup> visit.

**36. What happens if my members earn rewards for multiple levels in a single visit?**

The member could potentially receive multiple rewards in a single visit. For example, a plan has three reward level thresholds: \$10.00 earn a free coffee; \$20.00 earn a free desert, and \$50.00 earn a free entrée. If a member comes to your store and spends \$55.00 on eligible items, the member would receive all three rewards. However, if the "Maximum number or rewards a member can receive in a single day" setting defined in eFrequency Configuration will be checked. If the maximum was set to two rewards, the member would only receive two rewards for the visit and not all three.

**37. Can I place a limit on the amount of credit (such as points) my members can earn on a single guest check?**

Yes. The Bonus Plan application provides you with an option to define the maximum amount of credit (points, items, dollars, or visits) that a member can earn on a guest check. For example, A member who is enrolled in an items-based plan comes in to your store and picks up the tab for his church group. Even though there are 70 eligible items on that guest check, if you have the bonus plan configured to only allow a maximum of 20 items earned per check, the member would only receive credit for 20 items.

**38. If I limit the amount that can be earned on a guest check and a member exceeds that limit, what happens to the remaining credit?**

If the member exceeds the maximum allowable credit, the eFrequency system will disregard any credit for that visit in excess of the defined maximum amount.

**39. Can I schedule the days/times that my members can earn credit for a bonus plan?**

Yes. A bonus plan can occur only during the day of the week and times of the day that you specify. For example, you can create a bonus plan that only awards your members credit on the Fridays and Saturdays during the hours of 2:00 pm – 4:00 pm.



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**40. What other qualifiers can I place on a bonus plan?**

In addition to defining when bonus plans are “active” and the eligible items members must purchase to earn credit, you can also define the day part(s) or hours of the day in which the bonus plan is active, the revenue center in which the member must purchase the items to earn credit, and/or the order mode for the transaction.

**41. How do I reset a bonus plan?**

The Bonus Plan application provides you with options to reset your members’ earned credit for that bonus plan to zero. The following options are available:

- *When member receives the reward* – This option resets the members’ earned credit to zero after they have received the reward for the bonus plan.
- *Every year on a specified date* – This option resets the members’ earned credit to zero each year on the day and month you specify.
- *Reset every specified number of days after the member enrolls in the bonus plan* – This option resets the members’ earned credit to zero every x number of days after the member enrolls in the bonus plan.
- *Reset every specified number of days after the bonus plan start date* – This option resets the members’ earned credit to zero every x number of days after the user-defined start date for the bonus plan.

**42. When do these reset plans occur?**

The bonus plan will reset at midnight on the date of business change for the specified reset date.

**43. How does the option that resets a member’s credit after receiving a reward affect bonus plans with multiple reward levels?**

The credit resets to zero after the member receives the reward for the last level. For example, if you have three reward levels, the member’s credit would not reset until the member earns the third reward.

**44. Can I reward members with extra credit if they come in on a certain day or order specific items?**

Yes. The Bonus Plan application includes an excellent feature called *bonus events*. Bonus events allow you to place a multiplier on credit earned based on certain qualifications such as when and where your members use their cards, the items they purchase, etc. For example, you create a bonus plan that gives members one point for every dollar they spend. You can add a bonus event to the plan that grants members two points for every dollar they spend in your bar revenue center on Monday nights. Bonus events are a great way to entice your members to visit your stores during off-peak hours/days, or to sample items they might not typically order.

**45. What qualifiers can I place on bonus events?**

You can use the same qualifications (activation interval, eligible items, time of day, revenue centers, day parts, and order modes) that are available with bonus plans. Additionally, you can specify the number of items purchased, or the dollar amount spent within one or more categories for your members to qualify for the bonus event.

**46. Is credit earned for a bonus event determined by the time the check is opened or by the time an item is ordered on the check?**

This varies. If the bonus event is configured to qualify by day part, the check open time is used to determine if the check member will receive event credit. If the bonus event is configured to qualify by hours, the time the item was ordered would be used.

**47. Can I define the maximum amount of credit members can earn for a bonus event?**

Yes. Just as you can define the maximum amount of credit a member can earn at the bonus plan level, you can also limit the amount of credit that can be earned for each bonus event.

**48. Can bonus plans contain multiple bonus events?**

Yes. A bonus plan can contain multiple bonus events, each with its own credit multiplier and qualifications. Each bonus event will multiply credit earned separately. For example, a check qualifies for an event that awards double credit on beer items and a second event that awards triple credit on beer items during happy hour. The member would earn credit for each event individually. The member would earn 5 points on the check for the bonus plan. The member would receive an additional 5 points for the double credit event and an additional 10 points credit for the triple credit event. The member would receive a total of 20 points of credit for the bonus plan and events.

**49. Can I specify the stores where the bonus events can occur?**

Yes. For example, you can create a bonus plan that is active in all your stores, but the bonus event associated with the plan is only active in certain stores.

**50. What sort of modifications can I make to bonus plans after they've been created?**

Users within your company that have appropriate security access can edit various settings within a bonus plan at any time. This includes settings such as the eligible items, reward levels, scheduling options, bonus events, etc.

However, the following settings CANNOT be changed after *any* member has enrolled in that bonus plan has earned credit for the plan:

- Plan type
- Start date
- Changing a Frequency-based plan from "Every x number of visits" to "On special occasion" (and vice-versa)
- Allowing/disallowing items to count only once toward credit
- Changing points earned per dollar spent to points earned per number of items purchased—and vice-versa

Once a member has earned credit for a specific bonus plan, these settings will be disabled.

**51. When do the changes I make to my bonus plans take affect?**

The changes will take affect the next day of business.

**Accessing Member Information****1. After my members start using their eFrequency cards, how can I access information pertaining to them?**

The eFrequency Member Lookup application allows you to look up member information at anytime, only needing access to the Internet and access to your company's Enterprise.com website. Using this application, you can use various search criteria for accessing members such as their names, the last time a member used their eFrequency card, a range of card numbers, a specific card type, the first time a card was used, and an open search string that allows you to enter any search value.

The Member History application allows you to print or view a complete history of each time your members used their cards.

**2. What type of information can I obtain on my members via the Member Lookup application?**

Upon searching for a single member or a group of members, the data returned will display the following information with reference to your members' eFrequency card usage:

- The member's card number
- The member's first and last name
- The last time the member used his or her card
- The date the member signed up for your rewards program<sup>1</sup>
- The card type the member used for the transaction
- The date of the transaction
- The store name where the transaction occurred
- The check number for the transaction
- The bonus plan name(s) that were affected by the transaction
- The rewards (if any) that were issued for that transaction
- The amount of credit earned (if any) for that transaction
- The total purchase amount for the check

**3. Can I view check-level detail for each of my member's eFrequency transactions?**

Yes! The Member History application provides an efficient means to view the check detail associated with each eFrequency transaction by simply clicking on the transaction's check number, which will link you to the Drilldown Viewer. From here you can view pertinent information such as the other items that were ordered on the check, the time the item was ordered, etc.

**4. How long is my member's purchase history retained in our company's eFrequency database?**

A member's purchase history will be retained for 13 months.

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<sup>1</sup> The "sign-up date" is either when your members first use their eFrequency card or when their profile information was saved in your company's eFrequency database—whichever occurs first.

**5. Can I adjust the balance of a member's eFrequency credit?**

Yes. Users within your company that have the proper security rights can manually adjust credit balance by using the Member History application. Simply enter the member's card you would like to adjust, choose the bonus plan to adjust, enter a reason for the adjustment, and the new balance. This is very similar to the eCard manual adjustment feature.

**6. If I adjust a member's credit to the point where they are eligible for a reward, when can the member expect to receive the reward?**

If a member's adjusted credit meets or exceeds the reward threshold for a bonus plan, the next time that member is assigned to a guest check at any of your stores that participate in that bonus plan; the member will receive his or her reward. However, if upon the members visit to a store that does not participate in that plan, the member would not receive that reward.

**7. If I adjust a member's credit to where they receive an eCard Add Value reward (a reward that deposits money into their eCard account), when is that amount available to the member?**

Any eCard add value amount that's the result of a manual adjustment made within the eFrequency Member History application is not available to members until the next time they use their eFrequency card at your stores.

**eFrequency Usage****1. What is the cashier/server process at the POS when a member wants to earn eFrequency credit?**

The following illustrates a high-level summary for the process that takes place at the POS when your member's use their eFrequency cards:

1. The server/cashier orders the member's requested items on the check.
2. The eFrequency member presents his or her card number or some other form of profile ID to the server/cashier.
3. The server cashier presses a button that "assigns" the member to that guest check.
4. The POS sends the member's purchase information to the Enterprise data center, where the processing of any credit that has been earned by the member takes place.
5. The Enterprise data center sends information back to the POS indicating the member's new bonus plan(s) balance and whether or not the member has received a reward.
6. The server/cashier communicates the balance due to the member.
7. The member pays the amount due on the guest check.
8. The server/cashier closes the guest check.

**2. What is the response time for assigning a member to a guest check to determine if the member earned a reward?**

This is dependant on the type of Internet connection utilized at the store. For stores with a high-speed Internet connection, the response time for this is as low as four seconds. For stores that dial-out via a phone line for Internet connection, the response time will take a slightly longer.

**3. What happens if the Internet connection at the store is inoperable during the process of assigning a member to a guest check?**

In the event that the store is unable to communicate with the Enterprise data center due to an inoperable Internet connection, a message will display on the on-screen check to the server/cashier indicating that the member cannot be assigned due to connection issues at the store.

**4. What happens if the POS communicates the member information to the Enterprise data center, and then loses its connection before it receives the applicable information back from the data center?**

If a "pending" transaction does not receive a response from the Enterprise data center, the transaction will time out after a pre-set period of time. This means that even though the member might have earned credit (and possibly a reward), the updated balance and proposed reward has not been communicated to the POS. After this period of time, the POS will display a user-friendly message to the server/cashier indicating that the transaction timed out.

**5. In the scenario described above, what happens if the member earned credit and is eligible for a reward?**

When the check is closed (either by the server/cashier or during the EOD process), any credit and rewards earned by the member are queued for that member. If the member earned a reward on that transaction but did not receive it because the response from the eFrequency data center timed out, the next time that member used his or her card at one of your stores, the reward is granted to the member.

**6. What if the POS becomes inoperable when there is a pending transaction?**

If a member has been assigned to a check and the POS stops functioning for some reason, any credit and rewards earned by the member will be queued. Once the POS becomes operable and communication between the POS and eFrequency data center is established, the member's reward standings are updated. The next time the member uses his or her card at one of your stores, the reward is granted to the member.

**7. How do you recommend we test eFrequency before rolling it out to all of our stores?**

The best way to test eFrequency is to begin with a test in your lab. After testing eFrequency in your lab, we recommend you expand the test to one or two stores. You should consider creating one or more bonus plans that are active only in lab store and/or test stores. You can do this by setting up a Replication Group that only contains the test store. In the Bonus Plan application, you can then activate the bonus plan only for the one-store Replication Group. After you are confident in the bonus plan(s) you have defined, you can begin rolling them out to all of your stores that will accept the bonus plan(s). When testing the POS settings that you configure in the eFrequency Configuration application, you can "force" synchronization by deleting the eFreq.ini file and performing a member lookup. The system will detect that the eFreq.ini is missing, and replace it with the updated eFreq.ini.

**8. Can more than one member be assigned to the same check?**

No. Only one eFrequency member can be assigned to a guest check.

**9. Can more than one member be assigned to the same table?**

Yes. Multiple members can be assigned to the same table, but only one member can be assigned to each guest check for the table. The server would need to utilize the Split Check feature on the POS to add additional checks to the table.

**10. If our servers/cashiers have to wait until all items have been ordered before assigning a member to a check, what happens if the member is assigned and then decides to order something else?**

In the event a member is assigned to a check and later decides to modify the check by removing or adding items from the check, the member must be un-assigned from that check. This is an uncomplicated process for the server/cashier because the button they use to assign the member will change its text to "Un-assign Member" after the member is assigned to the check. The server/cashier simply presses the "Un-assign Member" button and edits the check as necessary. The button used to un-assign the member then changes its text to "Re-assign Member". After the check has been edited, the server/cashier presses the "Re-assign Member" button, and the member is assigned back to the check.

**11. Does re-assigning a member to a guest check require an Internet connection to the eFrequency data center?**

Yes. Because members will typically be re-assigned after edits have been made to the check the member is assigned to, the POS must communicate the updated information to the eFrequency data center. For example, if a member who is assigned to a check (and his or her information has been sent to the eFrequency data center) decides to order something else, the POS must send the new check information to the eFrequency data center to update the purchase information is associated with that member.

**12. What if the server/cashier mistakenly assigns a member to the wrong guest check?**

If a server/cashier erroneously assigns a member to an incorrect check, it is ultimately responsible for the server/cashier to realize this mistake. Once realized, the server/cashier can easily remove the member from the check by selecting the member and pressing the "Delete" button. This removes the member from the check, and the server/cashier can then access the proper check and assign the member to that check.

**13. Does deleting a member from a check require communication to the eFrequency data center?**

No. The delete transaction is queued at the store and is communicated to the eFrequency data center at the next synchronization between the store and the data center.

**14. What happens if a member is assigned to the wrong check and earns a real-time discount? Is the discount reflected on the wrong check?**

No. After a member is deleted from a check, the POS will automatically remove any real-time discounts that have been applied to that check.

**15. What if a server/cashier needs to close a check while information is still processing between the store and the eFrequency data center?**

If a check that has a member assigned to it is processing, the server/cashier must first delete the member from the check before closing the check.



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**16. What happens if a server/cashier forgets to close a check to which a member is assigned?**

During the EOD process, the check will close and communicate any credit the member earned on the check to the eFrequency data center and ignore any rewards that resulted from the credit.

**17. What if I have a store that's open for 24 hours? How does eFrequency handle this?**

The POS will run EOD either at a specified time, or will be manually fired by in-store personnel. During this time, all checks that are open on the POS will temporarily close—regardless if members are assigned to the checks or not. Before the EOD process completes, a new trans.log is started and all previously open checks on the POS are opened as a new check on the master terminal. The member will automatically be re-assigned to the new day's check.

**18. Can a member be assigned to a refund check?**

No. If you need to refund credit to a member that was earned on a previous visit to one of your stores, you should use the Member History application to manually adjust the member's bonus plan credit.

**19. Can members earn credit for multiple bonus plans on the same check?**

Yes. Members can earn credit for all bonus plans that are associated with the card that's used to assign the member to the check.

**20. Can a guest check with a member assigned to it be combined with another guest check?**

No. Guest checks that currently have members assigned to them cannot be combined with another check, regardless if the destination check has a member assigned to it or not. The same holds true if the check to which a member assigned is the destination check, meaning that a check cannot be combined with a check that has a member assigned to it. If the server or cashier attempts to combine checks and one of the checks has a member assigned to it, a user-friendly error message will appear informing the server or cashier why the checks cannot be combined.

**21. What if a member loses his or her card? Can I transfer card history and reward credit to another card?**

Yes. You can use the Member Lookup application to access the member who lost his or her card. Reassign the member a new card number and open a support incident to notify support of what has occurred, be sure to include the old card number and the new card number. The support team will notify you when the eFrequency reassignment has been completed. If there was a balance on an eCard, you must adjust the balance on the lost eCard to \$0.00 and adjust the balance on the new eCard to reflect the balance that was outstanding on the lost card.

**22. What happens when my members use their eCard/eFrequency card to pay for their order?**

When the card is swiped (or number entered) the POS will automatically assign the member to the check for eFrequency purposes. This means that a member cannot choose to redeem an eCard/eFrequency card without being assigned to the check. If the member earns a real-time discount for the transaction, the card will be redeemed using the discounted amount.



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**23. What happens if a member is redeeming an eCard/eFrequency card, and the store's Internet connection is down and I do not have a backup ISP? Can the member still use the card for redemption purposes?**

Yes. If the store is unable to connect to the data center when a customer is redeeming an eCard with eFrequency functionality on it, the eFrequency transaction will time out—notifying the server or cashier—but the eCard redemption will process. This is based on whether the store is caching the card balance or the auto-approve threshold for the card has been met.

**24. When a member receives an eCard Add Value reward, when is the added value actually reflected on the card?**

Because eFrequency offers you the option of selecting which store the eCard Add Value reward is charged to, the transaction actually takes place at the eFrequency data center and not at the store where the reward was earned. Thus, the eCard Add Value deposit will not take place until the check is closed, and the information has successfully been communicated to the eFrequency data center. The eCard balance should be available at the store level after the next business day. This allows eCard stores to synchronize with the central site to receive the card balance update.

**25. Are there any issues with redeeming an eCard Add Value reward?**

The member will be able to redeem the eCard Add Value reward after a full business day. The eCard Add Value occurs at the central site and based on each store's local cache synchronization schedule, the card balance may not be updated at the local store within the same business day.

**26. For my QuickService stores, can I use the Assign button function in a script?**

Yes. You can use the button function that assigns members to checks in a script, but another button will need to be defined elsewhere on a panel to allow the server/cashier the ability to utilize the Unassign/Reassign functions.

**27. Can I manually apply a comp or promotion while a member is assigned to a check?**

No. Any changes to the check amount require that there is no member assigned to the check or the member is in the unassigned state. Before manually applying a comp or promotion on a guest check to which a member is assigned, you must first un-assign that member, apply the comp or promotion, and then re-assign the member to the check.

### **Internationalization**

**1. I have stores outside of the United States. How is multi-currency handled with eFrequency?**

eFrequency provides multi-currency for the points-based plan by converting currency spent into points. If you would like to support another currency other than USD, you can specify the number of points earned for each unit of currency. For example, members can earn five points for every dollar they spend, and five points for every two Pesos they spend.

**2. Can I utilize other bonus plan types for stores outside of the United States?**

Yes. As noted above, you can use the points-based plan to convert currency into points across stores in different locals. All other plan types support internationalization since the plans are based on other metrics, i.e. number of visits or number of items purchased.

**3. Are eFrequency applications translated into other languages?**

Yes. The eFrequency applications can be viewed in other supported languages, by changing the logged in user's default language in the User Setup application.

**4. Will my voucher text automatically be translated into the language of my choice?**

No. You will need to create the voucher text in multiple languages. For example, if you want two vouchers, one in English and one in Spanish, you need to create two bonus plans that support the different languages in the voucher text.

**Security and System Administration****1. What are some things I can do to prevent in-store personnel and customers from trying to "beat the system"?**

eFrequency provides you with various security features that help deter in-store personnel and/or customers from abusing the system. However, educating yourself on what can and cannot be accomplished with relation to security and eFrequency—and enforcing those business rules as such—is extremely vital.

The security features are as follows:

- Members can be assigned to a check x times per day unless approved by a manager
- Require eFrequency member card to be swiped and disallow manual entry unless approved by a manager
- Disable the ability to assign member to check using an ID other than their eFrequency card
- Require Manager Password when assigning member to check

**2. Can I configure the POS to require password before my servers/cashiers can assign a members to guest checks?**

Yes. When setting up an eFrequency card, you can configure the card so that a password is required upon the server/cashier pressing the button that assign's members to guest checks. After a successful password entry, server/cashier can assign the member to the check.

**3. Why would I want to require a password on the POS prior to assigning my members to a guest check?**

If your company would like to employ "comp cards" using eFrequency, you can create a frequency-based bonus plan that issues a real-time discount as the reward. These "comp cards" cannot be used until a manager enters the password to assign the member. You can set the threshold for number of visits at two, which would require the manager to enter a password upon issuance of the card *and* when the card redeemed by the customer in a future visit. If you prefer to only require a password when the customer redeems the card in a future visit, simply set the threshold for visits at one. By setting the reset option of this bonus plan to "never" the card would only be good for one visit.

**4. What if I'm concerned about my in-store personnel copying a member's eFrequency**

**5. card number and using it for their own purposes?**

You can either configure the store to partially mask member card numbers on the POS and all eFrequency reports, and/or configure the store to only allow members whose cards are swiped to be assigned to guest checks.

**6. What if I'm concerned about my in-store personnel obtaining a piece of member profile data (such as driver's license number) and using that as a form of alternate ID for their own purposes?**

Allowing members to use an alternate form of ID is an option. Your company chooses which stores (if any) are allowed to accept alternate forms of ID for eFrequency. Additionally, you choose which forms of ID you want to allow. If you do decide to allow members to use alternate forms of ID, you should consider ones that can be partially masked on the POS and all reports. Driver's license, Social Security, credit card, and eFrequency card numbers can all be partially masked.

**7. What if one of my in-store personnel uses his or her own eFrequency card on all non-member checks to in efforts to receive masses of credit and reward vouchers?**

You can define—by store—the maximum number of checks to which an eFrequency member can be assigned during a single date of business. Once this limit has been met or exceeded, the POS will require a password before that member can be assigned to a check that day.

**8. Does the maximum number of checks to which a user can be assigned affect eCard redemptions?**

No. If even if a member has reached the limit to the number of checks to which he or she can be assigned during a single day of business, the member can still use his or her eCard/eFrequency card for redemption purposes.

**9. If I set the maximum number of checks to which a member can be assigned at "one" in all my stores, can my members earn credit in the same day at multiple stores?**

Yes. Because the maximum number of checks to which a member can be assigned during a single date of business is set at the store level, the threshold for this is only good at that store. Members can reach that threshold at each individual store during that date of business and still earn credit at each store, if applicable.

**10. What are the TCP/IP and Firewall requirements needed for the eFrequency?**

Ports 9099 and 8080 both must have outbound connections.

**11. Will the eFrequency work with VPN or Frame Relay?**

Yes. As long as there is Internet connectivity on your POS system, eFrequency will function with any IP network.

**12. What type of encryption is used to protect eFrequency transactions?**

eFrequency transactions are encrypted using an Information Concealment Engine. Our security engine features a 128-bit block cipher symmetrical key algorithm.

**13. What are the store requirements for eFrequency transactions?**

All your stores must have Aloha v5.3.12 or greater, and must have an active Internet connection, which can be a dial-up or WAN connection. Additionally, the BOH file server must be running Windows NT or greater as its operating system.



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**14. If the DSL connection at one of my stores fails, and we have a backup dial-up line, will the eFrequency automatically fail over to the dial-up line?**

Yes, if your stores contain a DSL line that is inactive during the submission of an eFrequency transaction, the system will fail over to a dial-up line if one is established. For example, you may have stores that generally connect via WAN or DSL. You can setup a backup ISP account that is only used should the WAN or DSL connection be unavailable.

**15. Can the EDC phone line be used for eFrequency?**

eFrequency transactions are done over IP, meaning that the system uses an Internet connection. While high-speed connections will definitely render a faster response time when processing eFrequency transactions, a dial up connection via ISP is sufficient for eFrequency. We recommend that you do not use your EDC line for your ISP connection.

**16. My stores use Internet protocol (IP) for EDC. Can I use the same ISP provider and phone line that I use for EDC for eFrequency?**

Because such a large percentage of checks are closed out to credit cards, we strongly suggest a separate phone line for eFrequency and EDC. However, you can use the same ISP, as long the ISP allows simultaneous logins for a single account. This will allow you to authorize credit cards at the same time you are processing eFrequency transactions. There is no problem in sharing a single high-speed connection between EDC and eFrequency.

**17. Can eFrequency use the same line as PC Anywhere?**

Yes. Many stores use their PC Anywhere phone line for processing eFrequency transactions. The PC Anywhere (i.e., "support line") can be used for eFrequency as long as PC Anywhere is running as always active. When PC Anywhere is setup to answer any incoming call, it ceases the modem resource, so that eFrequency, or any other software application, cannot access the modem device.