Retail Scan Data Incentive Reports

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Overview of Retail Scan Data Incentive Reports

There are two different retail scan data incentive reports within FasTrax Director that can be sent in to their respective manufacturers, Altria and RJ Reynolds. These are an easy way to bring in additional revenue by providing sales data that they request in very specific formats.

These can be found within FasTrax Director within the "Reports" module, under the "Sales Reports" header. To participate, working closely with an Altria and RJ Reynolds representative will be required, as they provide credentials and certifications that have to be completed first.

Following this guide will show how to properly set up items, multipack discounts, loyalty discounts, buydowns, promotional discounts, and the unit of measure.

Item Requirements

Items need the following parameters set up in "Item Details" in order to pass certification and send weekly:

1. Description – This should be detailed and easily decipherable
2. Department – The RJ Reynolds and AOM portion of the Altria report reports on the department level
3. Price – This should be the price before any discounts or buydowns
4. Link Information – Properly associating both packs to cartons and cans to rolls together are required
5. Manufacturer – The correct manufacturer is required on each and every item
6. Product Code – This is located under the "Secondary" tree information tab and requires the unit of measure value
7. RJR Promo Reporting – This is located in the "Additional Info" hyperlink and is used on the RJ Reynolds report to report the promotional value of promotional items, such as promotional packs

Buydown Requirements

Buydowns need to have the correct naming scheme and the checkbox checked to show in the report

1. Show In Retail Report – This should be checked for all buydowns that are to be reported
2. Name In Retail Report – This is the name that will be reported in the scan data report of the buydown

Multipack & Loyalty Discount Requirements

When discounting multiple packs in the same transaction, system discounts MUST be utilized. Specialty pricing or manually discounting item(s) are not options.

1. Discount Name – Assign the discount name according to what the representative requires
2. Discount Type – Choose the discount type, which is most commonly "$ Off Each Item" for multipack and loyalty discounts
3. Start / End Date – The date range the discount will be active
4. Qty – The item threshold required before the discount triggers
5. $ Off Each Item – The amount discounted off each item attached to the discount
6. Item Limit Per Sale – The number of times the discount can trigger in a single transaction
7. Require Loyalty – When checked, required a loyalty customer on the transaction to receive a discount
8. Is Altria Discount – Checked for Altria funded discounts, such as business enhancement funds or loyalty

PM/UST Retail Scan Data Fields

1. Start / End Date – The time frame of data to be on the report
2. Generate PM Data – Includes Philip Morris products in the report
3. Generate UST Data – Includes UST products in the report
4. Management Account Number – The account number provided by the Altria representative
5. Include Loyalty – Includes loyalty sales data, campaigns, and discounts in the report
6. Generate AOM Data – Allows user to choose specific departments to include in report
7. Chain Name – Name of company on business license
8. Automatically FTP File – Automatically sends scan data report to Altria
9. Use Security Key – Uses a security key if required when automatically FTPing the file to Altria
10. FTP Site – The URL of the FTP site the report is to be sent to, provided by the Altria representative
11. PM Loyalty UPC – The UPC for PM loyalty discounts that is provided by the Altria representative
12. UST Loyalty UPC – The UPC for UST loyalty discounts that is provided by the Altria representative
13. Username – The username for the FTP server provided by the Altria representative
14. Password – The password for the FTP server provided by the Altria representative

RJ Reynolds Scan Data Fields

1. Start / End Date – The time frame of the data to be on the report
2. Sequential File # – The sequential file number
3. Create As Test – Generates test data for certification
4. Use 34 Column Layout – Uses the 34 column layout of the report if required by RJ Reynolds representative
5. Outlet Name – Name of company on business license
6. Automatically FTP File – Automatically sends scan data report to RJ Reynolds
7. FTP Site – The URL of the FTP site the report is to be sent to, provided by the RJ Reynolds representative
8. FTP Port – The port number for the FTP site, provided by the RJ Reynolds representative
9. FTP Username - The password for the FTP server provided by the RJ Reynolds representative
10. FTP Password – The password for the FTP server provided by the RJ Reynolds representative
11. Available Departments – The list of available departments capable of being included in the report
12. Selected Departments – The list of departments that will be included in the report

POS Required Settings

1. Prompt For Item On Manuf Coupon – This setting prompts the cashier to tie a coupon to a specific item, each time a manufacturer coupon is scanned. It is required for both Altria and RJ Reynolds, so the representatives know the reasoning for pricing differences

Store Parameter Required Settings

1. Store Number – The store number on the business license
2. Store Name – The store name on the business license
3. Address – The store address on the business license
4. City – The city on the business license
5. State – The state on the business license
6. Zip – The zip code on the business license
7. Phone – The phone number on the business license

Common Feedback & Questions

1. Does FasTrax utilize loyalty reporting option 1 or option 2 for the Altria Retail Scan Data Report?
   a. FasTrax utilizes option 1

2. How does the Marlboro Loyalty discount look when set up?

3. How does a typical multipack discount look when set up?

4. How does the Altria business enhancement discount look when set up?

5. Unit of measure is causing validation warnings
    a. This would be because the product code of the item is incorrect or not set at all. Refer to the item setup of this document to see how to resolve this

6. Value added promotions is causing validation warnings
    a. The promotional value of the item has not been set. Refer to the item setup of this document to see how to add the "RJR Promo Value"

7. Can multiple discounts fire for the same items, such as loyalty and multipack?
    a. Yes, just make sure the discount priority level for the loyalty discount is a higher value than the others

8. How do you look at a specific transaction that received a validation warning?
    a. For the both reports, there is a column that contains a series of numbers that has transaction information. It is in the following format: XXXYYZZZZZ where X = store number, Y = register number, and Z = receipt number. You can run an e-journal report to view the actual receipt of the transaction