

# Feature Focus Guide: Campaign Rulebook

Core Product: Aloha Quick Service, Aloha Table Service  
Last Updated: December 11, 2023

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## Revision Record

Date	Version #	Description
Prior to 12/14/2022	v14.+	Introduced Campaign Rulebook.
	v17.1+	Included customer surveys and the ability to set printing conditions, such as a specific comp or promo cannot be applied to the guest check for the customer survey to print.
	v19.3.8+	Added the ability to define a set of conditions under which a customer survey prints.
12/14/2022		Converted the document to use new template.
01/17/2023		Updated the front cover and back page to reflect new NCR branding.
12/07/2023		Updated document to reflect NCR Voyix branding.

## About Campaign Rulebook

Campaign Rulebook at a Glance	
Core Product	Aloha Quick Service, Aloha Table Service
Complementary Products	No
Separate License Required?	No
Other References	Print Designer Feature Focus Guide, Customer Survey Feature Focus Guide, Aloha Quick Service Reference Guide, Aloha Table Service Reference Guide

Campaign Rulebook, available in Aloha<sup>®</sup> Quick Service and Aloha Table Service, supports marketing campaigns that help you generate traffic and increase sales in your restaurant. One common marketing approach is to offer a guest a reward they can redeem on a later visit, based on their purchases from the current visit. Using Campaign Rulebook, you can define a set of conditions under which a guest can earn a reward, either in the form of a printed voucher the guest can redeem on a later visit, a survey to complete, or it can be an immediate bounce-back reward. For example, when a guest purchases an entrée, you can print a voucher or customer survey offering the guest a free dessert on their next visit, with the provision that the guest redeem the voucher within a designated time period. Additionally, you can provide a survey whereby your guests can rate their visit to the restaurant and receive a reward after completion. Or, you can offer an immediate reward, such as a free \$5.00 gift card with the purchase of \$50.00 in gift cards. You can also print a voucher, on demand (see [Figure 1](#)), offer a guest a free item on their next visit.

You can also define a set of conditions under which a customer survey prints. For example, when a guest purchases a minimum of \$10.00 from the Food category, the designated customer survey prints on their guest check. You can also stipulate that a specific comp or promo cannot be applied to the guest check for the customer survey to print. In the Customer Survey function, a new choice, All, is available for 'Day part 1' on the Survey tab under the 'Day part/frequency setup' group bar. Selecting All ensures the survey prints for all day parts and removes the remaining 'day part' and

'frequency' options. When using Campaign Rulebook to set conditions under which a survey prints, you must use the Event Schedule function to activate the campaign and kick off the survey.




Figure 1 Print on Demand Offer

Create your surveys using the Survey function. You define the times when the survey is valid, the frequency the survey prints, such as for specific day parts or all day, a banner to precede the survey, and the text to appear in the survey.

 **Reference:** Refer to the Customer Survey Feature Focus Guide for more information.

Examples of some marketing campaigns include:

- 'Purchase an entrée valued at \$30.00 and receive a free appetizer on your next visit.'
- 'Purchase \$50.00 in gift cards and receive a free \$5.00 gift card.'
- 'We'd like to offer you a free hamburger as a thank you for completing our survey within 5 days of your visit. [www.alohacafesurvey.com](http://www.alohacafesurvey.com) Survey number: 1234-567-89. At the end of the survey, provide your email so we can send you the free hamburger offer.'
- 'Thank you for your visit. Please accept this voucher as a token of our appreciation. This voucher is good for \$5.00 off your next visit, from 01/12/2014 to 3/12/2014.'

 **Tip:** The Promotions feature in the Aloha<sup>®</sup> POS system is robust and can handle a lot of your marketing needs. Campaign Rulebook does not replace the Promotions function. If possible to achieve your promotion goal using Promotions, choose this function first.

# Configuring Campaign Rulebook

This document provides the configuration requirements within Aloha Manager and Aloha Configuration Center (CFC) for Campaign Rulebook. Refer to the Procedures at a Glance table for abbreviated steps, or, if you prefer more detail, click the link.

Campaign Rulebook Procedures at a Glance:	
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.	
1.	Access <b>Maintenance &gt; Hardware &gt; Print Designer</b> and design a voucher for each campaign in which you are trying to drive traffic back in to your restaurant at a later date. Use the layout of the 'General message' type in Print Designer to define and format the text that prints on the voucher. Refer to the <b>Print Designer Feature Focus Guide</b> for complete details regarding the layout of the 'General message' type. See <a href="#">page 7</a> .
2.	Access <b>Maintenance &gt; Messaging &gt; Survey</b> to create a survey in which to use in conjunction with a campaign. See <a href="#">page 9</a> .
3.	Access <b>Maintenance &gt; Guest Experience &gt; Campaign Rulebook</b> to create the rule that defines the conditions and actions under which a guest receives a reward for a campaign. See <a href="#">page 9</a> .
4.	Access <b>Maintenance &gt; Guest Experience &gt; Campaign Rulebook</b> to define conditions under which a customer survey prints. See <a href="#">page 16</a> .
5.	Access <b>Maintenance &gt; System Settings &gt; Activation Schedule</b> and <b>Maintenance &gt; System Settings &gt; Event Schedule</b> to activate the campaign. See <a href="#">page 19</a> .
6.	Access <b>Maintenance &gt; Payments &gt; Promotions</b> and create a <b>New Price promo</b> that auto-applies for use with a bounce-back gift card campaign. To designate the bounce-back gift card as free, type \$0.00 as the new price. See <a href="#">page 22</a> .
7.	Access <b>Quick Service Screen Designer</b> or <b>Table Service Screen Designer</b> and add a <b>button</b> to the Front-of-House (FOH) that allows you to print a campaign voucher on demand. (Optional) See <a href="#">page 25</a> .
8.	Access <b>Utilities &gt; POS &gt; Refresh POS &amp; All Installed Products</b> to refresh your POS system. See <a href="#">page 26</a> .

## Designing the voucher for a campaign

To define and format a voucher to print for a campaign in which you are trying to drive traffic back in to your restaurant at a later date, use the layout of the 'General message' type in Print Designer. We recommend you begin by copying the default 'General Message' template provided for you, rather than creating a layout from scratch, to save time and to complete the task more quickly. You can then remove elements from, or add elements to, your new layout, and move elements up or down, to change the order in which they appear on the voucher.

1. Select **Maintenance > Hardware > Print Designer**.



Figure 2 Print Designer - Layout Tab

2. Select **9996 General Message** from the 'Print Designer' drop-down list, if not already selected.
3. Click **Copy** in the Command panel to display the copy options.

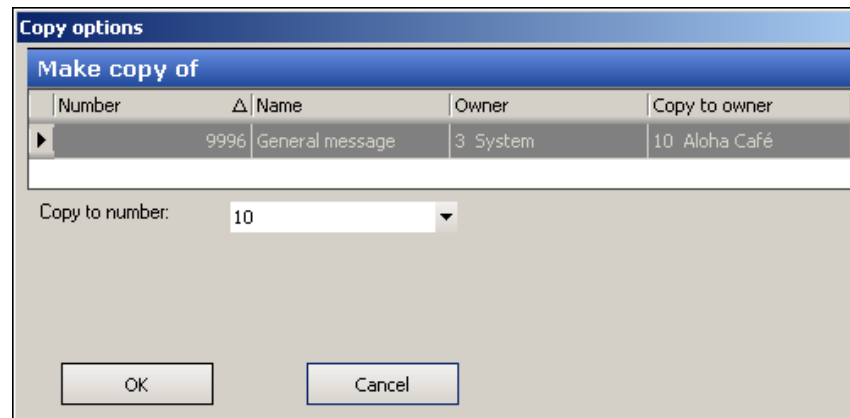


Figure 3 Copy of General Message

4. Accept the system assigned **number** or click the **drop-down arrow** next to 'Copy to number' to display the Number Assignment dialog box, from which you can choose an alternate number, and click **OK**.
5. Replace the **default text** of General Message in 'Name' with text that helps identify the layout, such as 'Guest Appreciation.'

- Click the **Design** tab. The default layout for the 'General message' layout appears.

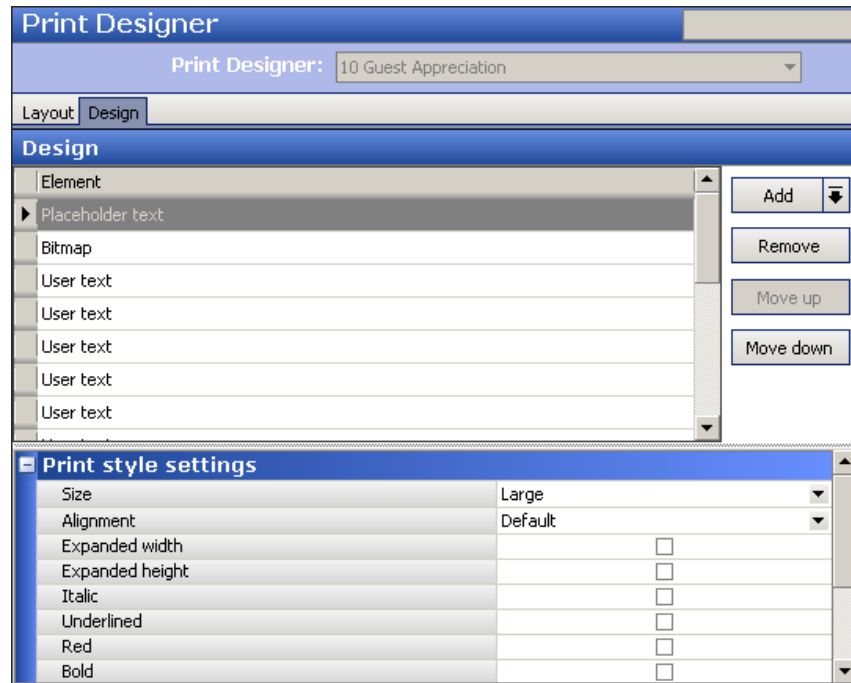


Figure 4 Print Designer - Design Tab

- Add or remove **elements** to the layout, based on your needs. For example, to insert a blank line between two lines of text, click the **Add** drop-down arrow, select **Linefeed** as the type, and click **OK**.
- Use **Move Up** and **Move down** to change the order in which elements appear in the layout.
- Select an **element** under the 'Design' group bar and options specific to that element appear under the 'Print style settings' group bar. Customize each element as you see fit.
  - Select the **relative size** of printed text for the selected element from the 'Size' drop-down list. Your choices are Large, Medium, Small, Very small, and Very large.
  - Select **Expanded width**, to stretch the printed element horizontally across the line.
  - Select **Expanded height**, to increase the height of the printed element.
  - Select **Italic**, **Underlined**, **Red**, or **Bold**, to change the appearance of the element, if desired.
- For 'User text' elements, under the 'User text settings' group bar, type the **text** to appear on that line of the voucher.
- To establish the number of calendar days after printing the voucher an offer is valid, select the **Redemption period** element under the 'Design' group bar and type the **number of days**, such as 10. The system then determines the redemption period beginning with the next business date.



For example, if you print the voucher on January 7th, the redemption period will be from January 8th to January 18th.

12. Click **Save** and exit the **Print Designer** function.

## Creating a customer survey


We expanded the Campaign Rulebook feature to allow you to also include a customer survey. You define a set of conditions under which a customer survey prints. You can also stipulate that a specific comp or promo cannot be applied to the guest check for the customer survey to print. Create a customer survey in the Survey function.

 **Reference:** Refer to the Customer Survey Feature Focus Guide for more information.

## Creating a campaign in Campaign Rulebook

The Campaign Rulebook function is where you define the actual set of conditions under which a guest can earn a reward for a campaign. You also specify the reward the guest receives when they meet the conditions of the campaign. The reward can be in the form of a printed voucher to be redeemed on their next visit to your restaurant, or an immediate reward, such as a free \$5.00 gift card with the purchase of \$50.00 in gift cards, or a survey to complete in exchange for a free item.

We recommend you create a separate category for each campaign. For example, create a separate category for your bounce-back gift cards in which you place only and all of your bounce-back gift card items. Create another category for your bounce-back t-shirts, and so on. In the case of bounce-back gift cards, you must also create a New Price promotion in which you stipulate the discounted price for the gift card. This is necessary because the system needs to automatically authorize the gift card at its full price, and then adjust the price for the bounce-back gift card to free on the guest check.

 **Tip:** For campaigns in which you offer other non-gift card items for free, just create a zero-priced item; a New Price promotion is not necessary.

**To create a campaign:**

1. Select **Maintenance > Guest Experience > Campaign Rulebook**.
2. Click **New** and accept the **system assigned number** or click the **ellipsis (...)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.

The screenshot shows the 'Campaign Rulebook' configuration window. At the top, there is a title bar 'Campaign Rulebook' and a dropdown menu showing 'Campaign Rulebook: 1 Guest Appreciation'. Below this, there are two tabs: 'Campaign Rulebook' and 'Rules'. The 'Identification' section is expanded, showing a table with the following fields: 'Number' (value: 1), 'Name' (value: Guest Appreciation), and 'Settings'. The 'Settings' section is also expanded, showing a table with the following fields: 'Apply action repeatedly if condition is met more than once' (checked) and 'Maximum number of times to apply the action' (value: 1).

Identification	
Number	1
Name	Guest Appreciation

Settings	
Apply action repeatedly if condition is met more than once	<input checked="" type="checkbox"/>
Maximum number of times to apply the action	1

Figure 5 Campaign Rulebook Tab

3. Under the 'Identification' group bar on the Campaign Rulebook tab, type a **name** for the campaign, such as 'Guest Appreciation.'
4. Under the 'Settings' group bar, select **Apply action repeatedly if condition is met more than once**, if you create a campaign that allows a guest to receive the reward for each valid occurrence of the campaign conditions on a guest check. For example, in a campaign that stipulates a 'Free Taco' voucher prints when a guest orders an entrée and a drink, if a family orders a burrito platter, an enchilada platter, and two drinks, valid conditions exist on the guest check for the guest to receive two 'Free Taco' vouchers.
5. Type the **maximum number of times** to apply the action, to stipulate the number of times a guest can qualify for a campaign, per guest check.
6. Continue to the **next procedure**.

**To establish the conditions under which a guest qualifies for a campaign reward:**

1. Select the **Rules** tab.

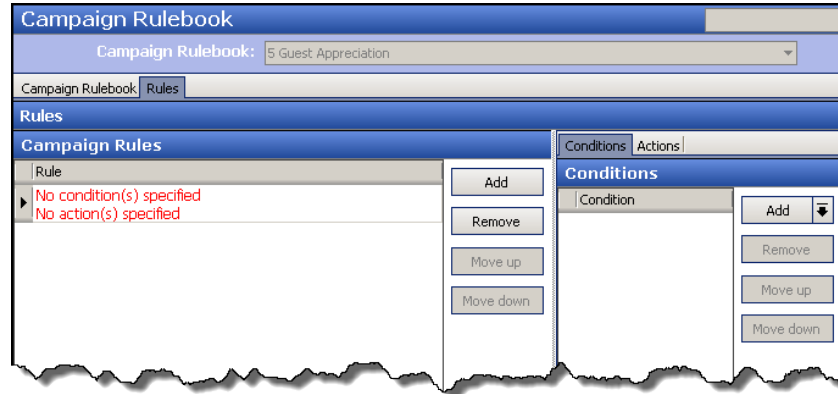


Figure 6 Rules Tab

2. Under the 'Campaign Rules' group bar, click **Add**. The 'Rule' appears in red text until you add a condition or action to the campaign rule, at which time the rule appears in green text.
3. To create a condition based on the category from which a guest makes a selection, on the Conditions tab located to the right, click the 'Add' drop-down arrow, select **Category** as the type, and click **OK**. The 'Category Condition' group bar appears.

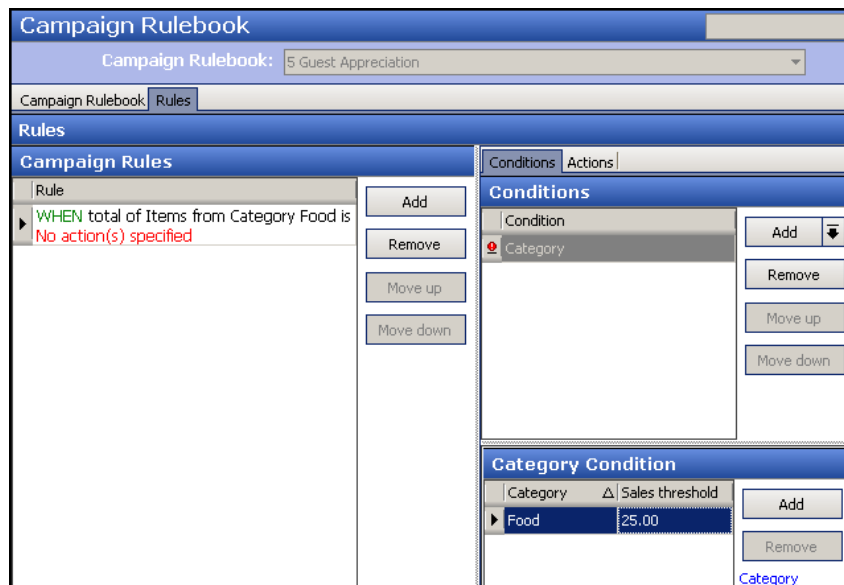


Figure 7 Condition - Categories

- a. Click **Add** to add a blank record.

- b. Click the **drop-down arrow** and select the **category** from which a guest must make a purchase to qualify for the campaign.
- c. Type the **minimum amount** a guest must purchase from the selected category before qualifying for the campaign in 'Sales threshold.' Zero (0.00) is a valid amount. For example, you can stipulate a guest must purchase at least \$25 from the FOOD category to qualify for the campaign.
- d. To create an 'or' situation and stipulate a guest can make a purchase from any of two or more categories to qualify, repeat **steps a thru c**. For example, do this if a guest must make a selection from either the FOOD category or the ENTREES category to qualify for this campaign.

**Tip:** You can define multiple conditions in a single rule. The system analyzes the conditions in the order they appear in the rule, and continues until a condition is true; once true, it applies the reward and exits Campaign Rulebook.

4. To create a condition based on the check total, under the 'Conditions' group bar, click the 'Add' drop-down arrow, select **Check total** as the type, and click **OK**. The 'Check total Condition' group bar appears.

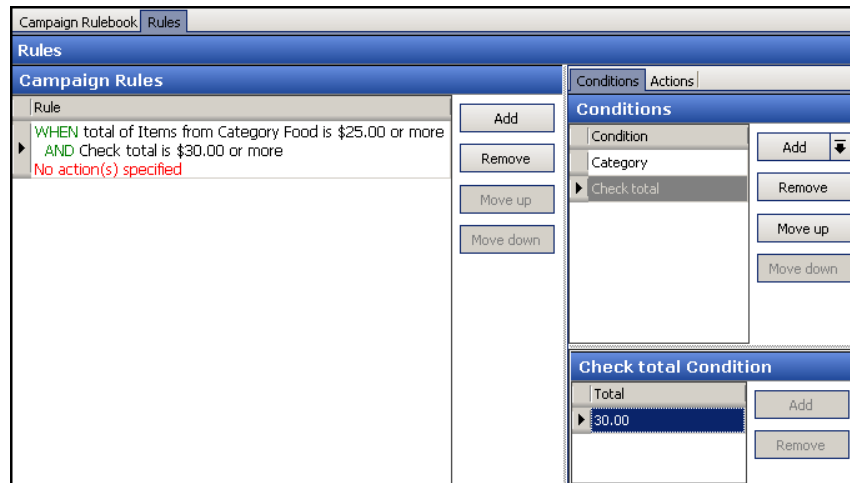


Figure 8 Condition - Check Totals

- a. Click **Add** to add a blank record.
- b. Click the **drop-down arrow** and type the **check total amount** required to qualify for the campaign. For example, you can stipulate the guest check must total at least \$30 to qualify for the campaign.

**Tip:** You can define multiple conditions in a single rule. The system analyzes the conditions in the order they appear in the rule, and continues until a condition is true; once true, it applies the reward and exits Campaign Rulebook.

- To delete a condition, click Remove under the 'Conditions' group bar.
5. To create a condition where the presence of a comp on the guest check stops the campaign from printing, under the 'Conditions' group bar, click the 'Add' drop-down arrow, select **Comp** as the type, and click **OK**. The 'Comp Condition' group bar appears.

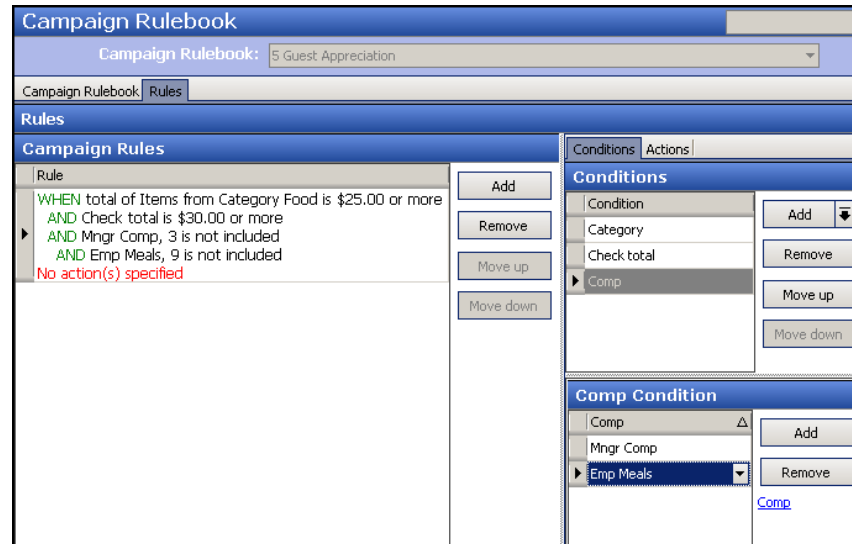


Figure 9 Condition - Comps

- a. Click **Add** to add a blank record.
- b. Click the **drop-down arrow** and select the **comp** to exclude the campaign from printing on the guest check.
- c. To add another comp, repeat **steps 2 and 3**.

To delete a condition, click Remove under the 'Conditions' group bar.

6. To create a condition where the presence of a specific promo on the guest check stops the campaign from printing, under the 'Conditions' group bar, click the 'Add' drop-down arrow, select **Promo** as the type, and click **OK**. The 'Promo Condition' group bar appears.
  - a. Click **Add** to add a blank record.
  - b. Click the **drop-down arrow** and select the **promo** to exclude the campaign from printing on the guest check. For example, 'Free Small Shake.'
  - c. To add another promo, repeat steps 2 and 3.

To delete a condition, click Remove under the 'Conditions' group bar.

7. Continue to the **next procedure**.

**To stipulate the actions of the campaign:**

1. Select the **Actions** tab, located to the right of the Conditions tab.
2. To print a voucher on the guest check for the guest to redeem on a later visit to your restaurant, click the **Add** drop-down arrow under the Actions group bar, select **Print general message** as the type, and click **OK**. The 'Print general message' group bar appears.

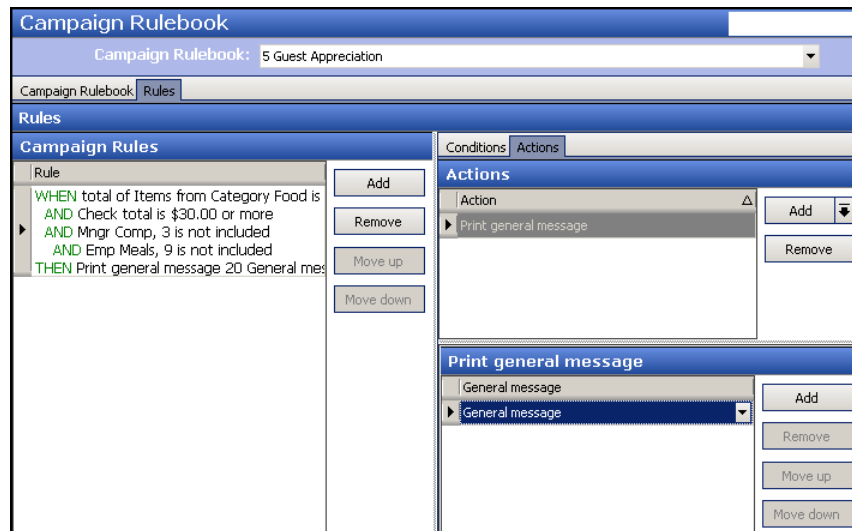


Figure 10 Printing General Message

- a. Under the 'Actions' group bar, click **Add** to add a blank record.
- b. Click the **drop-down arrow** and select **Print general message**.
- c. Under the 'Print general message' group bar, click **Add** and select the **general message** you created in Print Designer for this campaign.
- d. To add additional general messages to the guest check, repeat **steps a through c**.

The completed rule appears under the Campaign Rules group bar, allowing you to review your selections. To delete an action, click Remove.

3. To print a customer survey with the offer of a free or discounted item at the end, click the **Add** drop-down arrow under the Actions group bar, select **Print survey** as the type, and click **OK**. The 'Print survey' group bar appears.

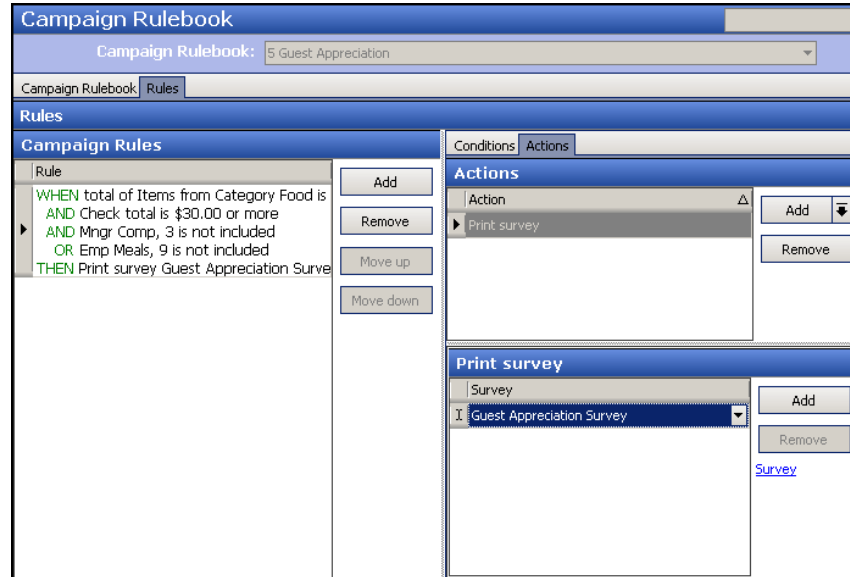


Figure 11 Printing Survey

- a. Click **Add** to add a blank record.
- b. Click the **drop-down arrow** and select **Print survey**.
- c. Under the 'Print survey' group bar, select the **survey** to print.
- d. To add additional surveys to the guest check, repeat **steps a through c**.

The completed rule appears under the Campaign Rules group bar, allowing you to review your selections. To delete an action, click Remove.

4. To reward the guest with a discounted item added to their guest check, such as a \$5.00 bounce-back gift card at no charge, click the **Add** drop-down arrow under the Actions group bar, select **Add item** as the type, and click **OK**. The 'Add item' group bar appears.

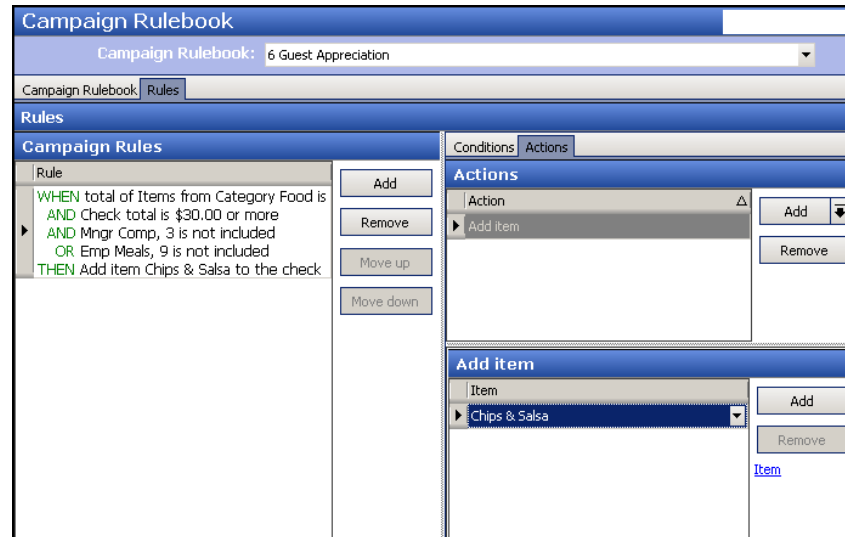


Figure 12 Adding Item(s)

- a. Click **Add** to add a blank record.
- b. Click the **drop-down arrow** and select the **Add item** from the drop-down list.
- c. Under the 'Add item' group bar, select the **item** to add.
- d. To add additional items, repeat **steps a through c**.

The completed rule appears under the Campaign Rules group bar, allowing you to review your selections. To delete an action, click Remove.

5. Click **Save** and exit the **Campaign Rulebook** function.

## Defining conditions for printing customer surveys

Campaign Rulebook feature allows you to also define a set of conditions under which a customer survey prints. For example, when a guest purchases a minimum of \$10.00 from the Food category, the designated customer survey prints on their guest check. You can also stipulate that a specific comp or promo cannot be applied to the guest check for the customer survey to print. In the Customer Survey function, a new choice, All, is available for 'Day part 1' on the Survey tab under the 'Day part/frequency setup' group bar. Selecting All ensures the survey prints for all day parts and removes the remaining 'day part' and 'frequency' options. When using Campaign Rulebook to set conditions under which a survey prints, you must use the Event Schedule function to activate the campaign and kick off the survey.

 **Reference:** Refer to the Customer Survey Feature Focus Guide for more information.



**To define conditions under which a customer survey prints:**

1. Select **Maintenance > Guest Experience > Campaign Rulebook**.
2. Click **New** and accept the **system assigned number** or click the **ellipsis (...)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.
3. Under the 'Identification' group bar on the Campaign Rulebook tab, type a **name** for the campaign, such as 'Guest Appreciation.'
4. Under the 'Settings' group bar, clear **Apply action repeatedly if condition is met more than once**, if you create a campaign that allows a guest to receive the reward for each valid occurrence of the campaign conditions on a guest check. For example, in a campaign that stipulates a 'Free Taco' voucher prints when a guest orders an entrée and a drink, if a family orders a burrito platter, an enchilada platter, and two drinks, valid conditions exist on the guest check for the guest to receive two 'Free Taco' vouchers.
5. Type **0 (zero)** to apply the action unlimited times, or specify a **number** to limit the number of times to apply the action.
6. Continue to the **next procedure**.

**To establish the conditions under which to print the customer survey:**

1. Select the **Rules** tab.

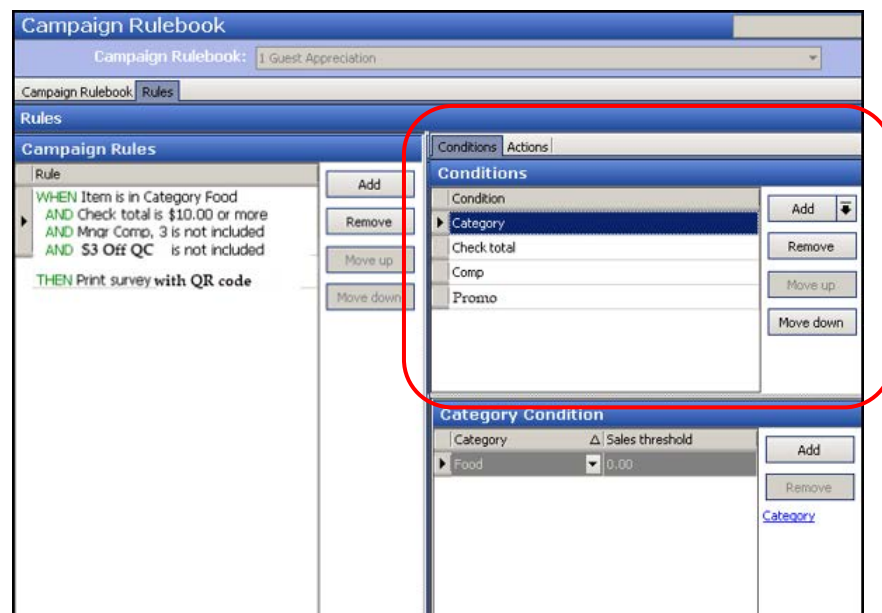


Figure 13 Campaign Rulebook - Conditions Tab

2. Under the 'Campaign Rules' group bar, click **Add**. The 'Rule' appears in red text until you add a condition or action to the campaign rule, at which time the rule appears in green text.

3. To create a condition based on the category from which a guest makes a selection, on the Conditions tab located to the right, click the 'Add' drop-down arrow, select **Category** as the type, and click **OK**. The 'Category Condition' group bar appears.
  - a. Click **Add** to add a blank record.
  - b. Click the **drop-down arrow** and select the **category** from which a guest must make a purchase to receive the survey.
  - c. Type the **minimum amount** the guest must purchase from the selected category before receiving the survey in 'Sales threshold.' Zero (0.00) is a valid amount. For example, you can stipulate a guest must purchase at least \$50 from the FOOD category before receiving the survey.
4. To create a condition based on the check total, on the Conditions tab located to the right, click the 'Add' drop-down arrow, select **Check total** as the type, and click **OK**. The 'Check total Condition' group bar appears.
  - a. Click **Add** to add a blank record.
  - b. Type the **amount of the check total** the guest must purchase before receiving the survey.
5. To stipulate a comp that cannot be included on the check, on the Conditions tab located to the right, click the 'Add' drop-down arrow, select **Comp** as the type, and click **OK**. The 'Comp Condition' group bar appears.
  - a. Click **Add** to add a blank record.
  - b. Click the **drop-down arrow** and select the **comp** to exclude, such as 'Mngr Comp' or 'Employee Meals,' setting the condition that if the related comp appears on the guest check, the guest does not receive the survey.
6. To stipulate a promo that cannot be included on the check, on the Conditions tab located to the right, click the 'Add' drop-down arrow, select **Promo** as the type, and click **OK**. The 'Promo Condition' group bar appears.
  - a. Click **Add** to add a blank record.
  - b. Click the **drop-down arrow** and select the **promo** to exclude, such as 'Free Med Fries,' setting the condition that if the related promo appears on the guest check, the guest does not receive the survey.
7. Continue to the **next procedure**.

**To establish the customer survey to print for the campaign:**

1. Select the **Actions** tab, located to the right of the Conditions tab.

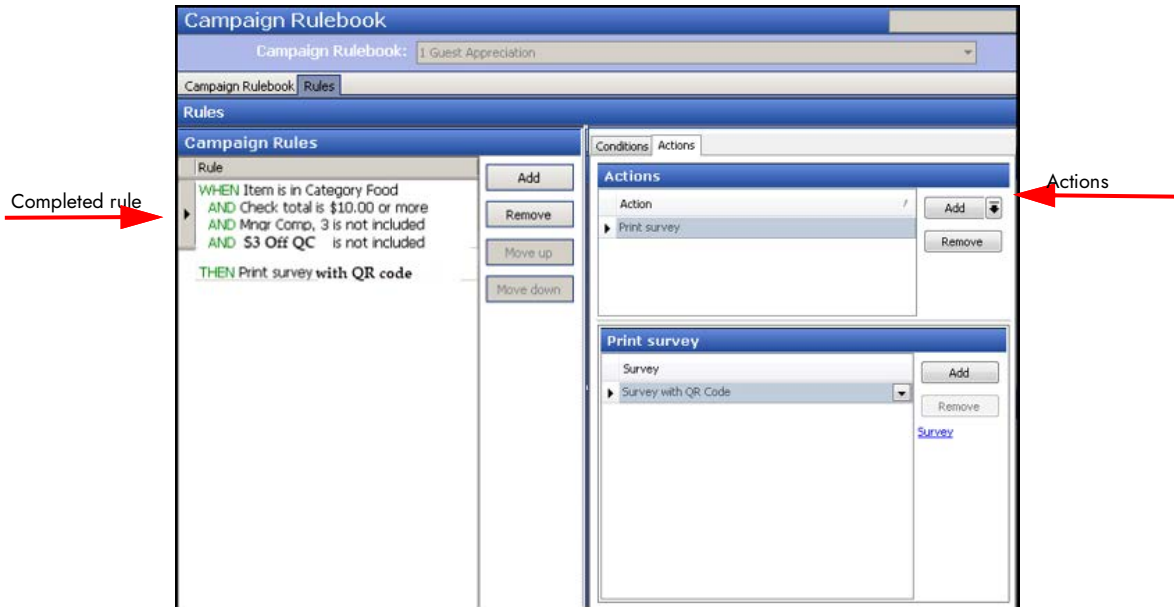


Figure 14 Campaign Rulebook - Actions Tab

2. Click the **Add** drop-down arrow under the Actions group bar, select **Print survey** as the type, and click OK. The 'Print survey' group bar appears.
  - a. Click **Add** to add a blank record.
  - b. Click the **drop-down arrow** and select the **survey** you created earlier.

The completed rule appears under the 'Campaign Rules' group bar, allowing you to review your selections.

3. Click **Save** and exit the **Campaign Rulebook** function.

## Activating a campaign

The Activation Schedule and Event Schedule functions work together to establish when and what campaigns to activate in a Campaign Rulebook. The activation schedule you choose determines when the campaign is to recur, such as daily or only on Thursday, and the time it is to start, such as start of day, or at 5:00 p.m. There are two event types used for supporting a campaign: Activate Guest Experience Campaign and Disable Guest Experience Campaign. Use Activate Guest Experience Campaign to designate a campaign to make active and choose an activation schedule with a desired recurrence and start time for kicking off the campaign. Use Disable Guest Experience Campaign to end a campaign prior to the end of day and choose an activation schedule with a desired recurrence and start time for disabling the campaign.

## Creating an activation schedule

Analyze your existing activation schedules to determine if a schedule with the desired recurrence interval and start time exists for activating the campaign as well as for cutting it off each day. If yes, use that activation schedule to activate the campaign; if not, create a new activation schedule to meet your needs. For the purpose of the scenario in this section, the campaign recurs daily and is in effect until 8:00 p.m. each day. The POS system provides a default 'Always' activation schedule configured for start-of-day, which meets the recurrence needs and start time for initiating the campaign; however, we need to create another activation schedule that starts at 8:00 p.m. to disable the campaign at that time and not wait until the end of day.

### To create an activation schedule that starts at 8:00 p.m. daily to use for disabling a campaign:

1. Select **Maintenance > System Settings > Activation Schedule**.
2. Click the **New** drop-down arrow, select **Daily** as the schedule type, and click **OK**.
3. Type a **name** for the activation schedule, such as Disable Daily Campaign.
4. Under the 'Time' group bar, enter the time using a 48-hour clock. To activate the schedule at 8:00 p.m. type **20:00**.
5. Click **Save** and exit the **Activation Schedule** function.



**Reference:** Refer to the Table Service or Quick Service Reference Guides for more information on Activation Schedules.

## Adding the Activate/Disable Guest Experience Campaign to event schedule

Adding the Activate Guest Experience Campaign event type to an event schedule designates the campaign to activate and the dates on which to offer this campaign to your guests. How you are using the Event Schedule function determines whether you add this event type to an existing event schedule or add it to a new event schedule you create. For the purposes of this document, we assume you use one event schedule to which you add all events. Add the 'Disable Guest Experience Campaign' event type to stop a campaign at a specific time of day rather than waiting for the end of day to occur to disable it.

### To activate the campaign using an existing event schedule.

1. Select **Maintenance > System Settings > Event Schedule**.
2. Select the **event schedule** to edit from the drop-down list.

3. Select the **Events** tab.

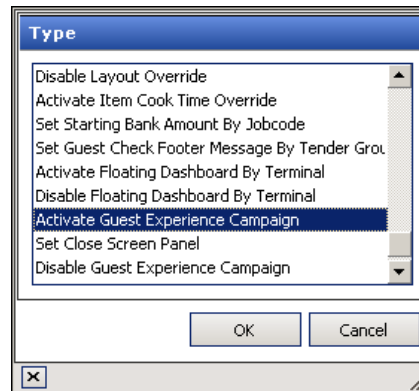


Figure 15 Type - Activate Guest Experience Campaign

4. Click the 'Add' drop-down arrow, select **Activate Guest Experience Campaign** as the event type, and click **OK**. Activate Campaign appears in the list of events.
5. Select **Always** from the 'Activation Schedule' drop-down list. Because the Always activation schedule stipulates to begin at 'start of day,' you cannot edit the 'Start time' in the event definition. This information is read only. If you want to stipulate a specific time of day to start the campaign, you need to select or create an activation schedule that starts at the correct time.
6. Select the **date** on which you want the campaign to become active at the store in 'Start date.'
7. Select the **date** on which you no longer want the campaign to be active at the store in 'End date.'
8. Under the 'Activate Guest Experience Campaign' group bar, select the campaign to activate from the drop-down list.
9. Continue to the next **procedure**.

**To stop the campaign at a specific time of day rather than waiting for the end of day to disable it:**

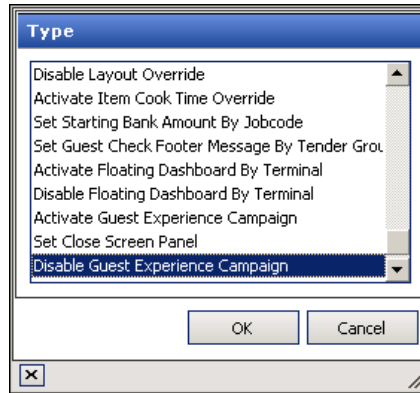


Figure 16 Type - Disable Guest Experience Campaign

1. Click the **Add** drop-down arrow, select **Disable Guest Experience Campaign**, and click **OK**. Disable Campaign appears in the list of events.
2. Select the **activation schedule** that starts at the time you want to stop the campaign.
3. Select the **same date** on which you want the campaign to become active at the store in 'Start date.'
4. Select the **same date** on which you no longer want the campaign to be active at the store in 'End date.'
5. Under the 'Disable Guest Experience Campaign' group bar, select the **campaign** to disable from the drop-down list.
6. Click **Save** and exit the **Event Schedule** function.

## Creating a promotion for a bounce-back gift card campaign

To configure the system so that it automatically adds a bounce-back gift card to the guest check based on a minimum purchase, such as a free \$5.00 gift card with the purchase of \$50.00 in gift cards, you must use the New Price promotion type, set the new price, in this case \$0.00 (free), and configure it to auto-apply. The New Price promotion is necessary because the system automatically authorizes the gift card at its full price, but adjusts the price for the bounce-back gift card to free on the guest check when it is offered as a reward on a bounce-back campaign. When creating a campaign where the guest receives a bounce-back gift card, we recommend putting the bounce-back gift card in a separate category. For example, create a category in which you only place your bounce-back gift card items.

**To configure a promotion to authorize a bounce-back gift card at its full amount, and then auto-apply the bounce-back gift card to the guest check at its discounted price:**

1. Select **Maintenance > Payments > Promotions**.

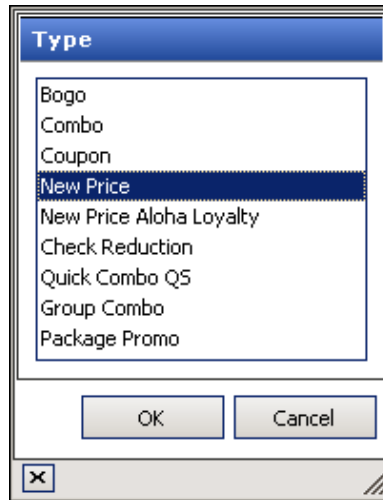


Figure 17 Type - New Price

2. Click the **New** drop-down arrow, select **New Price** as the type, and click **OK**.

3. Accept the **system assigned number** or click the **ellipsis button (...)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.

The screenshot shows the 'Promotions' window with the 'Settings' tab selected. The 'Promo' dropdown is set to '5 \$5 BB GC New Price'. The 'Settings' section includes the following fields and options:

Field	Value	Options
Number	5	...
Name	\$5 BB GC	
Type	New Price	
Active	<input checked="" type="checkbox"/>	
Start date	6/25/2015	▼
End date	7/22/2015	▼
TS First available button position	<input type="checkbox"/>	
TS Button position	None	...
OS Panel Sort Order	0	
Report as	Default	▼
Print check on close	<input checked="" type="checkbox"/>	
Manager required	<input checked="" type="checkbox"/>	
OS Do not show in promo lookup list	<input type="checkbox"/>	
TS Include discount amount in tippable sales	<input type="checkbox"/>	
Include discount amount in gratuity calculation	<input type="checkbox"/>	
Export ID	0	

Below the settings are sections for 'Bar code range' and 'Validation'.

Figure 18 Promotion Tab

4. Type a **name**, such as Free \$5 BB GC, to assist with identifying the promotion.
5. Select **Active**.
6. Use the drop-down arrows to select the **dates** on which the New Price promotion starts and ends from the calendar.
7. For Table Service, clear **First available button position** to enable 'Button position' and ensure **None** appears in 'Button position.' A bounce-back promotion does not need to appear on the Promotions screen because it auto-applies to the check.
8. Select **Print check on close**, to automatically print a copy of the guest check immediately after applying this promotion, for the guest to view.
9. Select **Manager required**, if a manager must enter their number to apply the bounce-back promotion. Clear this option to allow any employee to apply the bounce-back promotion.



10. Select the **New Price** tab.

Promotions	
Promo: 5 \$5 BB GC New Price	
Promotion	New Price   Requirements   Eligibility   Taxes   Restrictions
New price	
Base discount category	None
Maximum items eligible for new price	0
Auto-apply	<input checked="" type="checkbox"/>

Figure 19 New Price Tab

11. Select **Auto-apply** to automatically discount the bounce-back item when items on the guest check qualify for the bounce-back promotion.
12. Select the **Eligibility** tab.
13. Under the 'Items' group bar, click **Add** and select the **bounce-back gift card item**.
14. Type the **discounted price** for the bounce-back gift card in the New Price column. To discount a bounce-back gift card so that it is free, type 0.00 as the new price.
15. Click **Save** and exit the **Promotions** function.

## Adding button to FOH for on-demand campaign voucher printing

The Aloha POS system allows you to print a campaign voucher on demand from a FOH terminal.

**Tip:** We highly recommend using a script on the button, so that you can include manager approval for security reasons and have better control over who receives the campaign voucher.

You can add the button to any panel in Quick Service; however, for Table Service, you must add the button to either a floor plan in use or create a panel of the Order Entry type to customize the buttons available to you in the lower right portion of the order entry screen.

**Tip:** If you choose to customize the buttons available in the lower right portion of the order entry screen, refer to the Custom TS Order Entry Screen Feature Focus Guide for more information.

### To add a button for on-demand campaign voucher printing:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer** or **Table Service Screen Designer**.
2. Select **Work with Panels**.  
Select **Panel > Open Panel**, select a **panel**, and click **OK**.  
-OR-  
Create a **new panel**. If you are using Table Service, select either **New Floorplan Panel** or **New Order Entry Panel**.
3. Right-click the **panel** and select **New Button**. The Properties dialog box appears.
4. Under the 'Function' group bar, select **Script** from the 'Action' drop-down list.
5. Select the **ellipsis button (...)** from the 'Script Actions' drop-down list. The Edit Script Actions dialog box appears.
6. Click **Add**.
7. Under the 'Function' group bar, select **Just-in-time Manager Approval** from the 'Action Type' drop-down list.
8. Select **one or more access levels that need the ability to approve the on-demand print** from the 'POS Access Levels' drop-down list.
9. Click **OK**.
10. Click **Add**.
11. Under the 'Function' group bar, select **Print Message** from the 'Action Type' drop-down list.
12. Select the applicable **campaign message**, created using Print Designer, from the 'Message' drop-down list.
13. Click **OK**.
14. Under the 'Appearance' group bar, type a **name** for the button, such as 'Free\nBurrito.' To display text on multiple lines, insert '\n' without spaces for line breaks.
15. Configure the **remaining options** as you would for any other button.
16. Select **Panel > Save Panel** and exit **Quick Service Screen Designer** or **Table Service Screen Designer**.

## Refreshing the data

After all settings are in place in Aloha Manager, you must select Utilities > POS > Refresh POS & All Installed Products to transfer the new information to the FOH terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. If you run the refresh prior to the EOD process, select 'Automatically restart all POS terminals' and click OK to continue. After the data refresh is complete, all new settings become operational across the Aloha network.

**⚠ Caution: Refresh data with caution and never during peak hours of operation. All FOH terminals reboot during a refresh and are down for a short period of time.**

## Using Campaign Rulebook

In keeping with the examples sited in [“About Campaign Rulebook” on page 4](#), the following procedures walk you through printing a voucher the guest can redeem on a later visit based on their current purchases, an immediate bounce-back reward for a free \$5.00 gift card with the purchase of \$50.00 in gift cards, and printing a voucher on demand, offering the guest a free item on their next visit.

### Auto-printing a voucher based on guest purchases

You offer a campaign that automatically prints a voucher when a guest purchases an entrée valued at \$30.00. The voucher allows the guest to receive a free slice of French Silk pie on their next visit, as long as that visit is within a specific time frame. The guest orders a Steak, valued at \$30.00.

#### To auto-print a voucher based on guest purchases:

1. Log in to the **FOH**.
2. Start a new **check**.
3. Add the **Steak item** to the guest check. The system recognizes the Steak item is an entrée valued at greater than \$30.00.
4. When the guests are ready to leave, close the **guest check**.

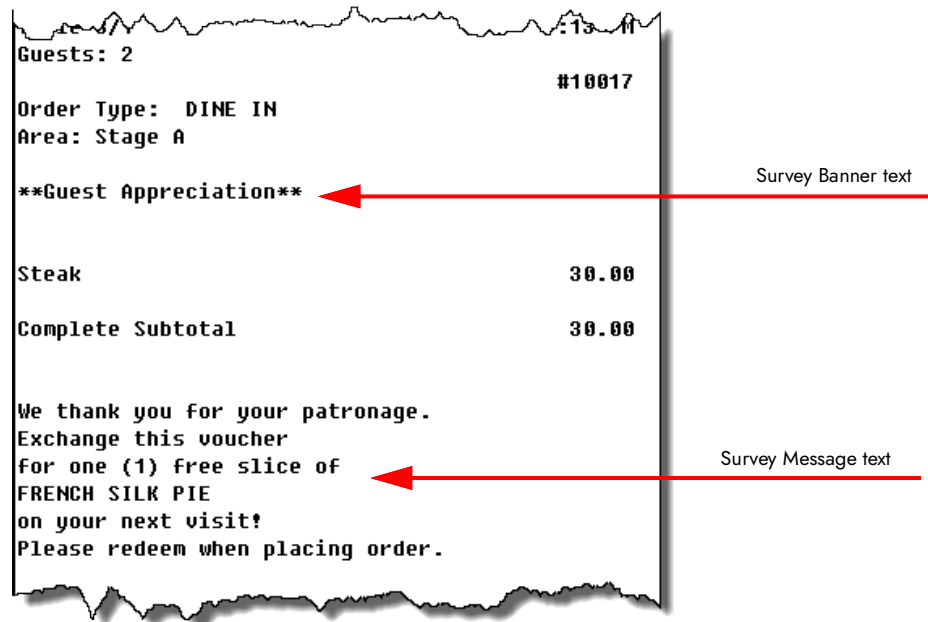


Figure 20 Auto-Printing a Voucher Based on Guest Purchases

A message in the form of a voucher prints at the bottom of the guest check, letting the guest know they qualify for the free appetizer if they visit the restaurant within the designated time frame.

## Printing a survey based on conditions

You offer a survey campaign that automatically prints a survey when a guest check totals \$30.00 and an employee meal comp is not included on the check. Your guest rates their experience at your restaurant and provides an email address upon completion, which allows you to email a coupon to the guest for a free item.

### To print a survey:

1. Log in to the **FOH**.
2. Start a new **check**.
3. Add the **items** to the guest check, which totals over \$30.00.
4. Verify an **employee meal comp** is not on the guest check.
5. When the guests are ready to leave, close the **guest check**.

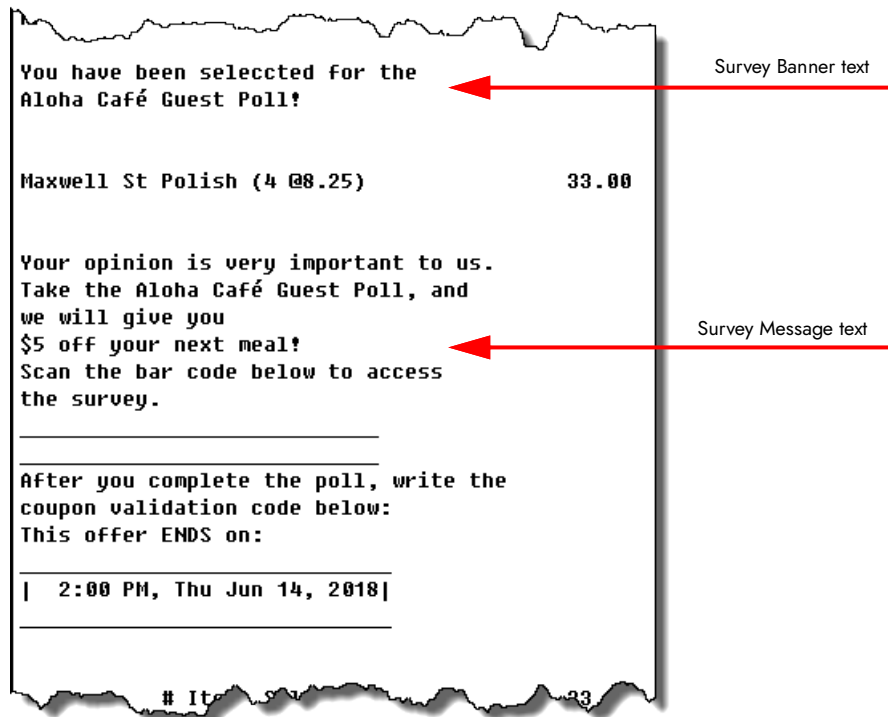


Figure 21 Printing a Survey Based on Conditions


A message in the form of a survey prints at the bottom of the guest check, letting the guest know if they complete the survey and provide a coupon validation code, they will receive \$5.00 off their next meal.

## Rewarding a guest with a bounce-back gift card

You offer a campaign that automatically rewards a guest with a free \$5.00 gift card when the guest purchases a minimum of \$50.00 in gift cards. The system discounts the bounce-back gift card differently, depending on if you use Quick Service or Table Service. Quick Service discounts the bounce-back gift card as soon as the verification is complete; Table Service discounts the bounce-back gift card only after you touch Close to apply payment and close the guest check.

### To reward a guest with a bounce-back gift card in Quick Service:


1. The cashier adds a **\$50.00 gift card** to the guest check. The system recognizes the guest qualifies for a free \$5.00 bounce-back gift card reward based on the purchase of a \$50.00 gift card and displays a prompt to notify the cashier. The cashier can touch OK to confirm and activate the free bounce-back gift card, or touch Cancel to decline it.
2. The cashier touches **OK** to confirm.

 **Tip:** If the cashier does not have sufficient access, the manager approval screen appears. A manager, or employee with sufficient access, must enter their password to continue.

3. The cashier adds a **\$5.00 bounce-back gift card** to the guest check to enable activation. The system verifies the gift card and, when approved, automatically applies the promotion to reduce the price of the bounce-back gift card to zero.
4. The cashier applies **payment** and **closes** the check.

### To reward a guest with a bounce-back gift card in Table Service:

1. The server adds a **\$50.00 gift card** to the guest check. The system recognizes the guest qualifies for a free \$5.00 bounce-back gift card reward based on the purchase of a \$50.00 gift card and displays a prompt to notify the server. The server can touch OK to confirm and activate the free bounce-back gift card, or touch Cancel to decline it.
2. The server touches **OK** to confirm.

 **Tip:** If the server does not have sufficient access, the manager approval screen appears. A manager, or employee with sufficient access, must enter their password to continue.

3. The server adds a **\$5.00 bounce-back gift card** to the guest check to enable activation. The system verifies the check.
4. The server touches **Close** to apply payment to the check. The system automatically applies the promotion to the \$5.00 bounce-back gift card to reduce the price to zero.
5. The server accepts **payment** and closes the **check**.

## Printing a voucher on demand

You offer a campaign that allows you to print a voucher on demand, thanking a customer for their visit and offering \$5.00 off their next visit as a token of appreciation. The guest must return to your restaurant and redeem the voucher within a specific time frame. This campaign is helpful in situations where you want to promote goodwill with a customer who may have been unhappy with their service.

### **To print a voucher on demand:**

1. The cashier touches the **'voucher' button** on the FOH. The manager approval screen appears.
2. If required, a manager, or employee with sufficient access, enters their **password**. The voucher prints to the local printer.

## Campaign Rulebook, Feature Focus Guide

NCR Voyix welcomes your feedback on this document. Your comments can be of great value in helping us improve our information products. Please contact us using the following email address:  
[Documentation.HSR@NCRVoyix.com](mailto:Documentation.HSR@NCRVoyix.com)