SmartReceipt
User Guide for Phase 2

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PROGRAM UPDATE

SmartReceipt rolled out in December 2014/January 2015 and now we have enhancements to make this an even stronger marketing tool.

What is SmartReceipt?

- A tool for increasing guest frequency to help drive sales and profits.
- A cool receipt that prints out valuable **coupon offers** and important marketing information.
- Randomizes coupon offers for our **guests**.

Key Enhancements

- Additional optional coupon offers that you can select for your shop.
- Fun and important optional messages can be added for your store—from Now Hiring! to Order Your Mother's Day Cake Now.
- Add or remove coupons or messages at any time.
  Note: The four (4) mandatory locked coupons by the Brand cannot be changed or removed.
- Access your Online Account from any computer to control SmartReceipt at one or all of your stores
- Print coupons can still be accepted. Follow your current in-store procedures.
- Rotate up to a total of 8 offers and marketing messages at a time

Crew Recommended Practices

- Hand receipt to EVERY guest.
- SHOW guests our new receipts
- TELL guests that they received a **coupon offer** for their next visit.
- HIGHLIGHT the coupon
- EXPLAIN to guests that they can tell us about their visit and receive a **coupon** for their next visit by:
  - Visiting www.tellbaskinrobbins.com or scanning the QR code on the receipt (within 3 days).
  - Answering the questions on our Guest Satisfaction Survey **and then,**
  - Receiving $1.00 off their next purchase of $4.00 or more.

SmartReceipt Optional Coupon Offers

In addition to the four required offers, you can choose to add optional offers that will rotate on SmartReceipt

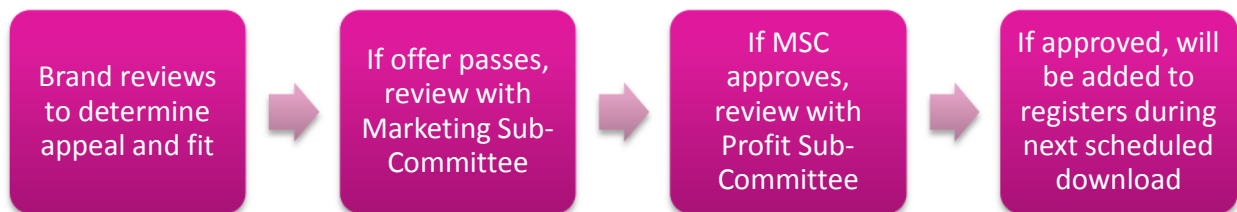| Optional Offer	Rationale	Aggressiveness	Recommended Way to Use
Buy Any Sundae, Get One Free	• Strongest traffic driver • Highest redemption rate during test: 4.8%	High	Great for off-peak weeks or when you need to boost guest counts
Buy Any Cone, Get One Free	• Strong traffic driver • 2nd Highest redemption rate in test: 2.2%	High	Great for off-peak weeks or when you need to boost guest counts
31% Off Your Order	• Strong potential to drive traffic	High	Use it to bring guests in during off-peak. Able to lift ticket and party size.
$1 off any Fresh Pack	• Good ticket driver at $8.80 during test	Moderate	Good add-on purchase at any time of year
$5 Banana Split	• Proven successful in several test markets	Moderate	Appetite appeal brings people back. Above average price for promo item
$5 Off a Cake ($20 or more)	• Strong ticket driver • Drives cake business	Moderate	Drive cake sales when not in the middle of a major Cake holiday
$2 Off a Purchase of $10 or more	• Good ticket driver • Helps increase party size	Moderate	Good offer any time of year to lift ticket and party size
Free Topping (with any Ice Cream purchase)	• Adds fun to the ice cream purchase at a low cost	Low	Could be offered at any time of year. Likely not a great traffic driver.
Free Waffle Cone (with the purchase of any Scoop)	• Adds fun to the ice cream purchase at a low cost	Low	Raises awareness of our waffle cone program

SmartReceipt Optional Promotional Messages

Key Message	Timing
Now Hiring! Cool jobs at this Baskin-Robbins	Phase 2 Start Date to 12/31
Come Celebrate the 31st at Baskin-Robbins!	Two-week lead ups to the 31st in May, July, Aug, Oct, and Dec.
Order your Mother's Day Cake Now	4/25 to 5/9
Order your Father's Day Cake Now	6/6 to 6/20
Order your Halloween Cake Now	10/16 to 10/30
Order your Thanksgiving Cake Now	11/10 to 11/24
Order your Holiday Cake Now	11/27 to 12/24
Check out our New Flavors! There is always something new at B-R	Phase 2 Start Date to 12/31

Requesting a New Coupon or Promotional Message Process

One of the other features is if you have an idea for a new coupon or promotional message you can request it for your shop.

- The new Coupon Request process will likely take 3 months.

Brand reviews to determine appeal and fit	→	If offer passes, review with Marketing Sub-Committee	→	If MSC approves, review with Profit Sub-Committee	→	If approved, will be added to registers during next scheduled download

- The new Promotional Message Request process will likely take 2 to 4 weeks.

Brand reviews to determine appeal and fit	→	If offer passes, review language with DBI Legal	→	If approved, offer will show up as an option on SmartReceipt dashboard

SmartReceipt Details

Online cake ordering information

Easier to read Guest Survey information

One of new optional coupons good for future dates

Your store's address

Details of purchase

Optional message field: Choose key messages like "Now Hiring" or "Order Your Mother's Day Cake Now." Note: these messages will add to the length of the receipt

OPERATIONAL HOW-TOS

Setting up Your Account

1. Go to www.receipt.com
2. Click **Login** [at the top-right corner of the screen].
3. Click **Forgot Password?.**
4. Enter the same email address in which your initial log in was sent.
5. Click **Reset Password.**
6. Go to your email account and open 'Reset password instructions' email.
7. Click on the link to change password.
8. Log in using newly created password.

Dashboard Overview

Change email/ password

*Change an offer for a specific store

End your session

View notifications from SmartReceipt

Send feedback to SmartReceipt

Your account name

Baskin Franchisee — My Account | Inbox | Change Context | Send Feedback | Logout
Baskin Robbins Corporate Lab Market - Company Level

*This link only appears on dashboards of multi-store owners.

Select coupons & messages

Baskin Franchisee — My Account | Inbox | Change Context | Send Feedback | Logout
Baskin Robbins Corporate Lab Market - Company Level

Opt-in Messages

Sync

Update changes

Opt-in Zones
2 opt-in zones available to Baskin Robbins Corporate Lab Mar

Opt in messages home screen

Search

Name	Optin Count
Coupon (BR) (Baskin Robbins)	6
Promotional Messages (Baskin Robbins)	

Number of coupons, promotions and surveys currently being used

Adding Coupons

Adding coupons is two part process.

1. Selecting the coupon(s) on the dashboard to upload it to the POS.
2. Activating the coupon(s) on the POS for redemption.

Part 1: Selecting Coupons on the Dashboard

1. Go to www.receipt.com
2. Click **Login** at the top-right corner of the screen.
3. Log in using credentials.

If…	Then…
You are a **single store** owner	Go to step 6.
You are a multi store owner and want to add a coupon to *all* stores	Go to step 6.
You are a multi store owner and want to add a coupon to *only* one store	Proceed with step 4.

4. Click **Change Context.**
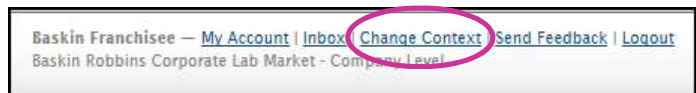
    Result:
    Your stores appear individually.

5. Click on the store in which you would like to add a coupon.
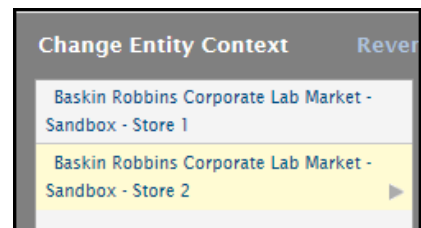
    Result: The respective store is listed.

    Note: To return to the Parent level and edit content for all stores, click on **Revert Context.**

6. Click on **Coupon.**

Result: Coupon screen opens with all available coupons.
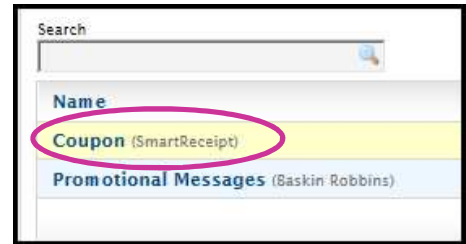
7. Click on the coupon you want to add and drag it to the left (Opt-in) side.
   a. To view the coupon and expiration period, hover over it with your mouse.
   b. Repeat until all coupons have been added.
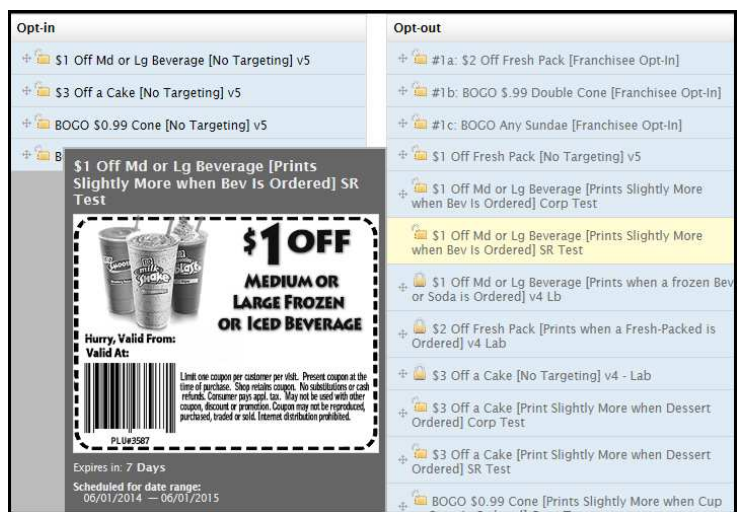
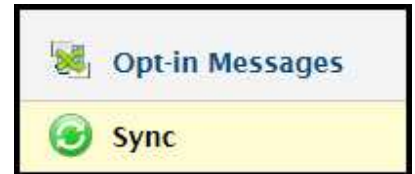Coupon now added

8. Click **Save** in the top right corner.
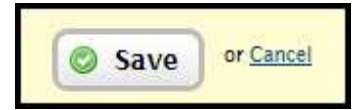
Result:

- You will be brought back to the main menu and the Optin Count will show the new total number offers currently in effect.
- In this example, there were initially 4 coupons. Since one was just added, there are now 5.
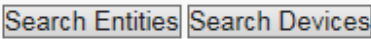
9. Click **Sync** on the left side.

10. Select your store.

Note:

Item	Description
Search Entities and Search Devices ![Search Entities Search Devices]	• Used to search for store (entity) names or terminal (device) names. • Should not be needed as everything should show up and there will be no need to search.
Red Status button ![red x]	• Indicates the software on the terminal has stopped communication back to our servers (e.g. internet down) • Updates will not be able to be 'Sync'd" to the terminal until the connection is restored • **Contact Support (866-688-7428)** to ensure this is addressed

11. Click **Sync** at the top.
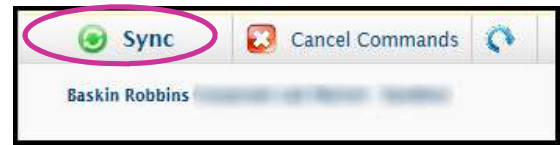
Result:

- Sync message screen appears.
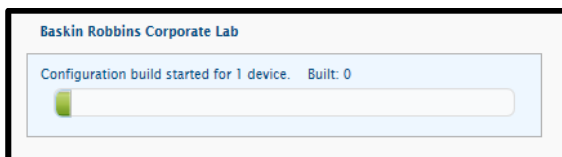- You can choose to sync now or later.
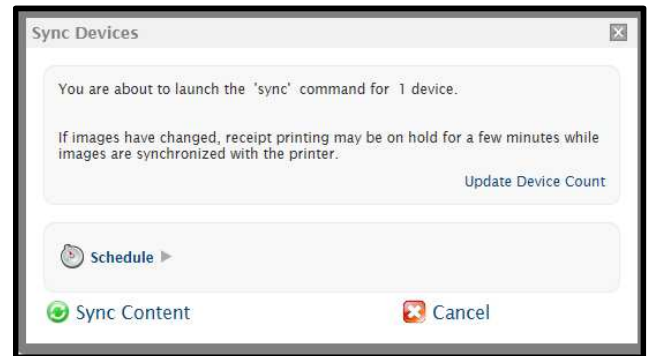
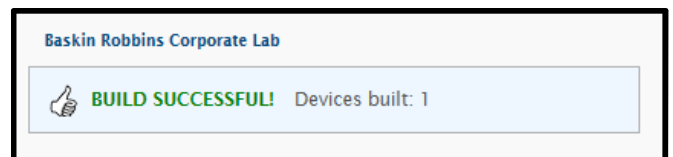12. Click **Sync Content** (in this example we chose to sync now).
Note: If you would like to schedule your sync for a later date, then follow the steps for Scheduling your Sync on page 23.
Result: The syncing process bars appear.

Syncing in progress   *Syncing complete*

- Syncing new coupons usually takes 3-5 minutes.
- The changes will not take effect until they have been synced.

Suggested Practices:
- Sync your store(s) when traffic is slow or the store is closed, as your receipt printer may be unavailable during the Sync.

- Ensure the POS terminal and printer are ON at the time of the Sync.

Part 2: Activating the Coupon(s) on the POS

All optional coupons are sent down as inactive to PAR POS systems.

- Coupons **MUST** be activated by going into Coupon Setup in the Back Office.
- Choose a maximum of four optional offers at any one time.
- If you also want to add a marketing message, such as Now Hiring or Order Your Cake today, then you should choose a maximum of three offers.
- Having more optional offers may cause your register to hesitate when it prints the SmartReceipt.

Current Coupon Names:

- SRO-Free Waffle Cone
- SRO-Free Topping
- SRO-$5 Banana Split
- SRO-$1 Off Fresh Packed
- SRO-$5 Off Any Cake

- SRO-BOGO Any Sundae
- SRO-BOGO Any Cone
- SRO-$2 Off $10 or more
- SRO-31% Off Order
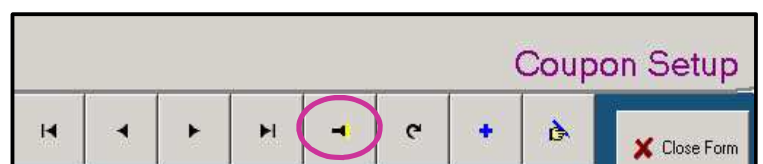
1. Log into the Back Office (System→Manager→Back Office).

2. Click on the Window tab across the top and uncheck **Show Active Records Only**.
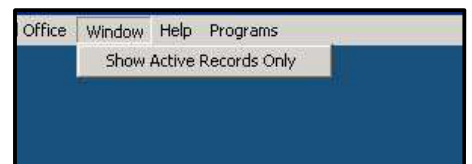
3. Click on **General Setup → Coupon Setup.**

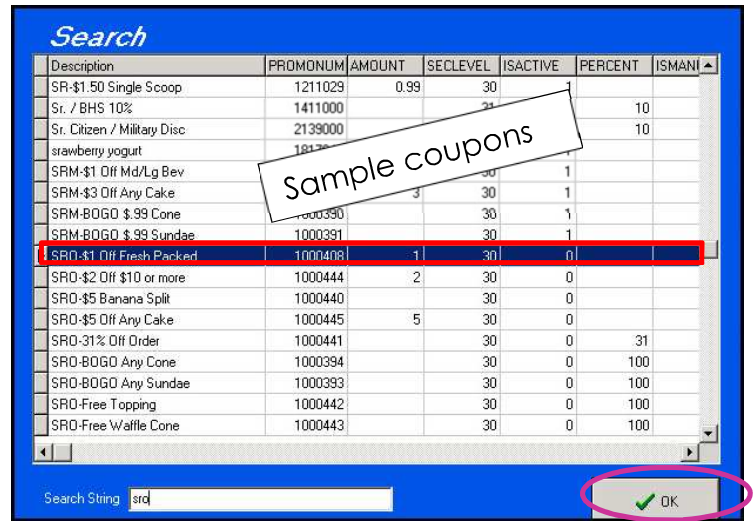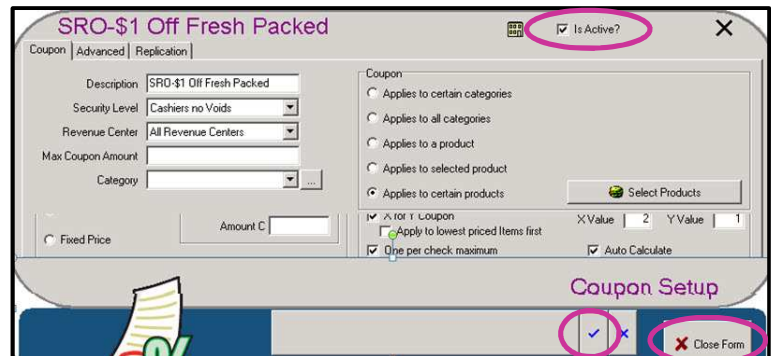4. Click on the Flashlight icon to search.

5. Enter the first character of the coupon name in the search string field. For example enter SRO.

   Result: All coupons starting with SRO appear.

6. Click on the coupon.

7. Click on **OK**.

8. Check the **Is Active?** box to activate.

9. Click the check mark to save the coupon.

10. Repeat steps for all coupons.

11. Click **Close Form** to exit Coupon Setup.

12. Exit out of the Back Office.

13. Log out from the main menu screen.

Removing Coupons

Removing coupons is a two part process.

1. De-Selecting the coupon(s) on the dashboard to remove it from the POS.
2. De-activating the coupon(s) on the POS.

Part 1: De-Selecting the coupon(s) on the Dashboard

1. Go to www.receipt.com
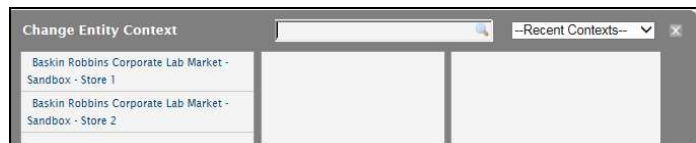2. Click **Login** [at the top-right corner of the screen].
3. Log in using credentials.

If…	Then…
You are a **single store** owner	Go to step 6.
You are a multi store owner and want to remove a coupon from *all* stores	Go to step 6.
You are a multi store owner AND want to remove a coupon to *only* one store	Proceed with step 4.

4. Click **Change Context.**

Baskin Franchisee — My Account | Inbox | Change Context | Send Feedback | Logout
Baskin Robbins Corporate Lab Market - Company Level

Result:
Your stores appear individually.

Change Entity Context   --Recent Contexts--   x
Baskin Robbins Corporate Lab Market - Sandbox - Store 1
Baskin Robbins Corporate Lab Market - Sandbox - Store 2

5. Click on the store in which you would like to remove a coupon.

Change Entity Context   Rever
Baskin Robbins Corporate Lab Market - Sandbox - Store 1
Baskin Robbins Corporate Lab Market - Sandbox - Store 2 ▶

Result: The respective store is listed.

Opt-in Zones
2 opt-in zones available to Baskin Robbins Corporate Lab Market - Sandbox - Store 2

Note: To return to the Parent level and edit content for all stores, click on **Revert Context**.

Change Entity Context   Revert Context
Baskin Robbins Corporate Lab Market - Sandbox - Store 1
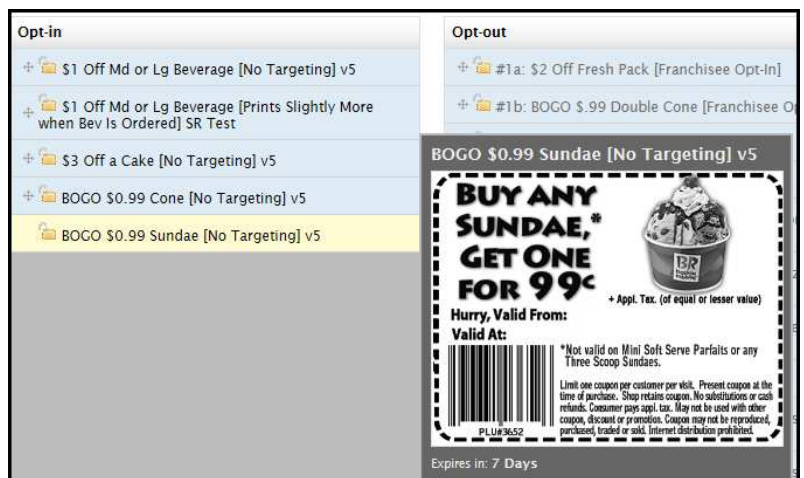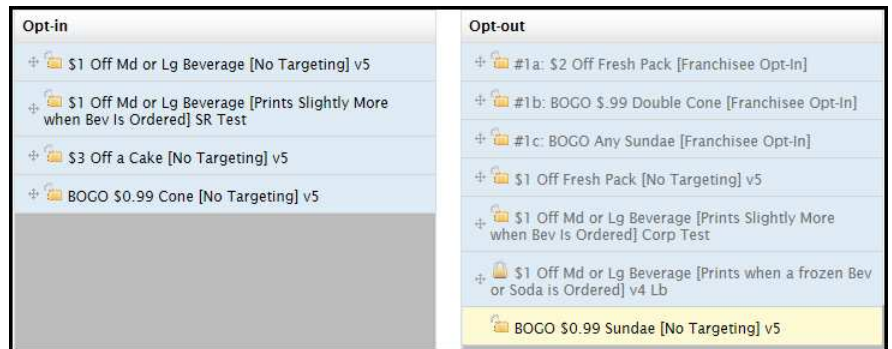Baskin Robbins Corporate Lab Market - Sandbox - Store 2

6. Click on **Coupon.**
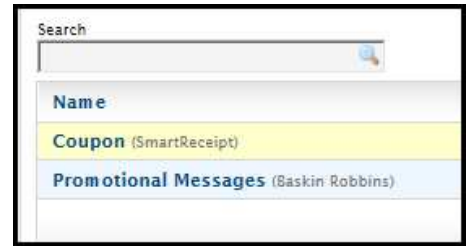
7. Click and drag the offer you want to remove to the right (Opt-out) side
   a. To view the coupon, expiration period and targeting details, hover over it with your mouse.
   b. Repeat until all coupons have been removed.

Result:

8. Click **Save** in the top right corner.

Coupon now removed

Page 14

Result:

- You will be brought back to the main menu and the Optin Count will show the new total number offers currently in effect.
- In this example, there were initially 5 coupons. Since one was just removed, there are now 4.

Note: You can Add and Remove coupons or messages during the same session.

9. Click **Sync** on the left.
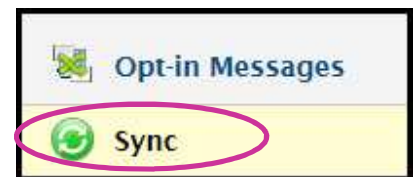
10. Select your store(s)
    a. You can select multiple stores at once

11. Click **Sync** at the top.

Result:

- Sync message screen appears.
- You can choose to sync now or later.

12. Click **Sync Content** (in this example we chose to sync now)

Note: If you would like to schedule your sync for a later date, then follow the steps for Scheduling your Sync on page 23.

Result: The syncing process bars appear.

Syncing in progress   *Syncing complete*

Baskin Robbins Corporate Lab

Configuration build started for 1 device.   Built: 0

Baskin Robbins Corporate Lab

👍 BUILD SUCCESSFUL!   Devices built: 1
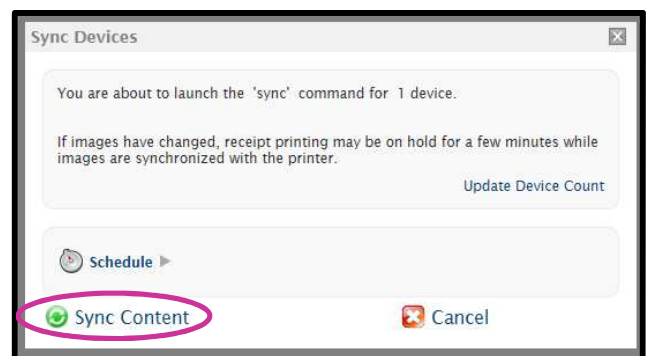
- Syncing new coupons usually takes 3-5 minutes.
- The changes will not take effect until they have been synced.

Part 2: De-activating the coupons on the POS

Coupons must remain active on the POS for the duration of the redemption period in order for guests to use the coupon.

- Coupons are valid for one week starting the day after the guest receives the coupon.
- Cake offers are valid for two weeks starting the day after the guest receives the coupon.

For example, if the guest receives a SmartReceipt coupon on 4/2/15, then it is valid 4/3/15 – 4/10/15 and it should not be removed until 4/11/15 or later.

1. Log into the Back Office (System→Manager→Back Office).

2. Click on **General Setup → Coupon Setup.**
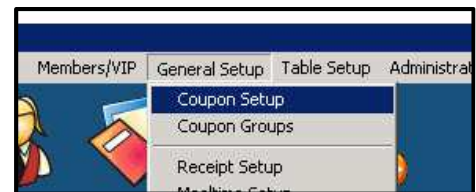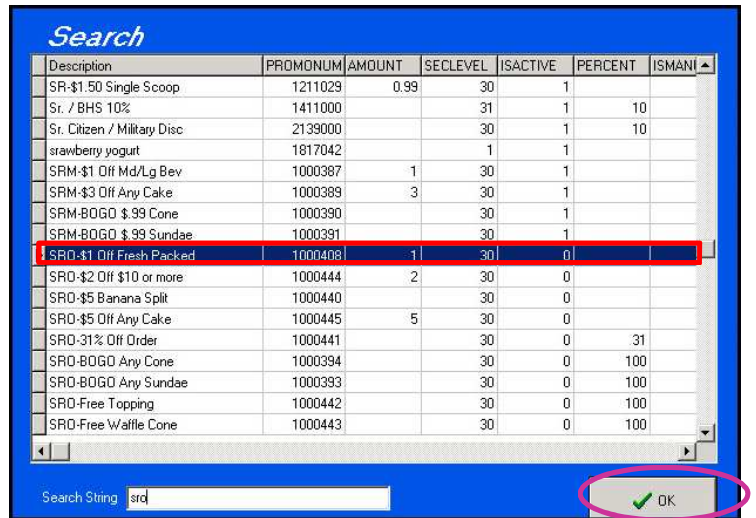

3. Click on the Flashlight icon to search.
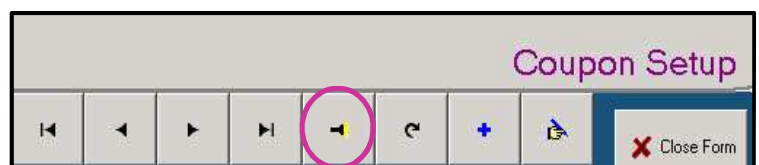
4. Enter the first character of the coupon name in the search string field. For example enter SRO.

    Result: All coupons starting with SRO appear.

5. Click on the coupon.

6. Click on **OK**.
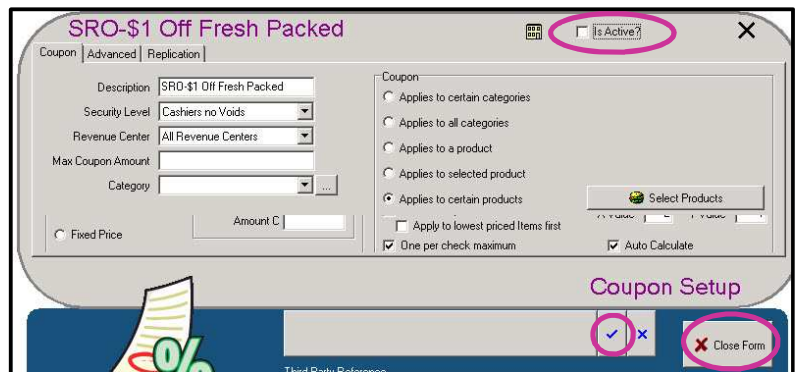

7. Un-check the **Is Active?** box to de-activate.

8. Click the check mark to save the coupon.

9. Repeat steps for all coupons.

10. Click **Close Form** to exit Coupon Setup.

11. Exit out of the Back Office.

12. Log out from the main menu screen.

Remember:
Do not remove coupons until one day after the offer expires.

Adding Promotional Messages

1. Go to www.receipt.com
2. Click **Login** [at the top-right corner of the screen].
3. Log in using credentials.

| If…	Then…
You are a **single store** owner	Go to step 6.
You are a multi store owner and want to add a promotional message to *all* stores	Go to step 6.
You are a multi store owner AND want to add a promotional message to *only* one store	Proceed with step 4.

4. Click **Change Context.**
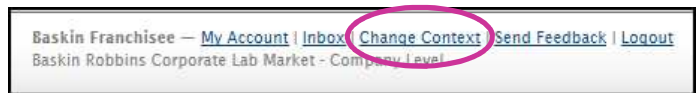
Result:
Your stores appear individually.

5. Click on the store in which you would like to add a promotional message.
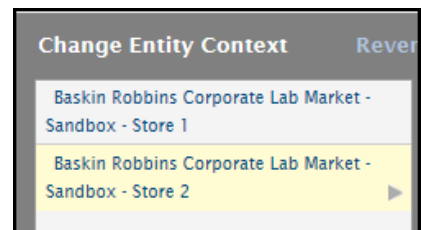
Result: The respective store is listed.

Note: To return to the Parent level and edit content for all stores, click on **Revert Context.**
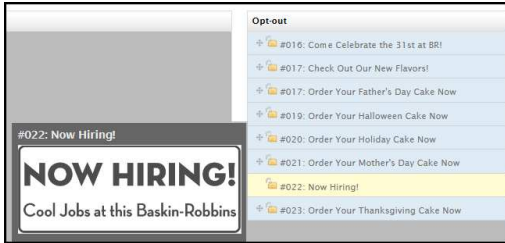

6. Click on **Promotional Messages.**
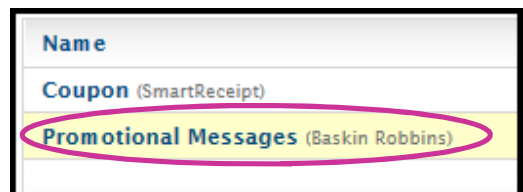
7. Click on the offer you want to add and drag it to the left (Opt-in) side.
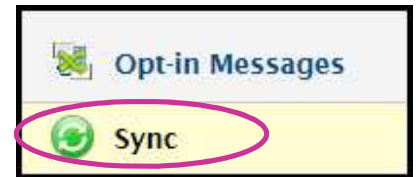   a. To view the message hover over it with your mouse.

8. Click **Save** in the top right corner.
   Result: You will be brought back to the main menu and the Optin Count will show the new total number offers currently in effect.
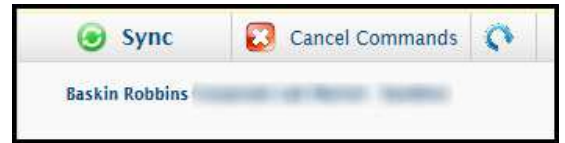

9. Click **Sync** on the left.

10. Select your store(s)
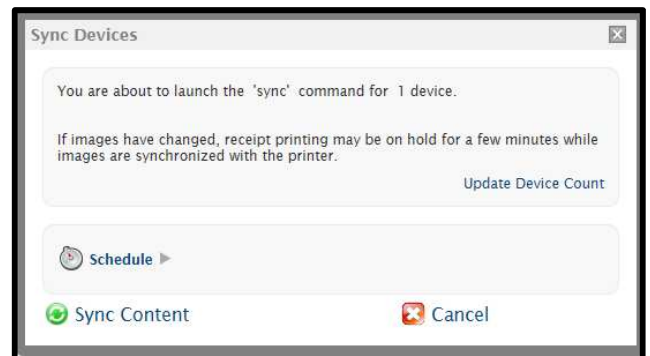   a. You can select multiple stores at once.

11. Click **Sync** at the top.

Result:

- Sync message screen appears.
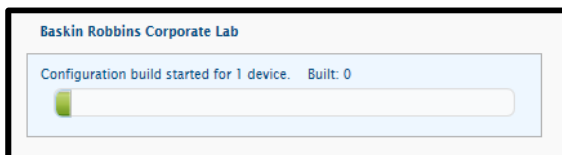- You can choose to sync now or later.

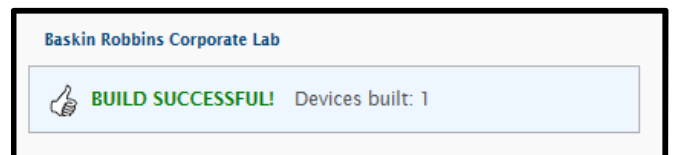13. Click **Sync Content** (in this example we chose to sync now).

Note: If you would like to schedule your sync for a later date, then follow the steps for Scheduling your Sync on page 19.

Result: The syncing process bars appear.

Syncing in progress   *Syncing complete*

- Syncing new coupons usually takes 3-5 minutes.
- The changes will not take effect until they have been synced.

Removing Promotional Messages

1. Go to www.receipt.com
2. Click **Login** [at the top-right corner of the screen].
3. Log in using credentials.
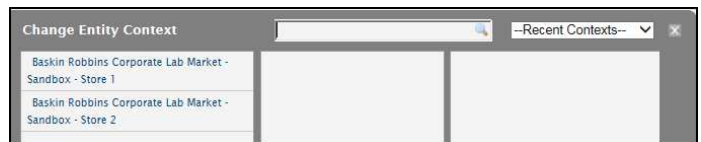
| If…	Then…
You are a **single store** owner	Go to step 6.
You are a multi store owner and want to remove a promotional message from *all* stores	Go to step 6.
You are a multi store owner AND want to remove a promotional message to *only* one store	Proceed with step 4.

4. Click **Change Context.**
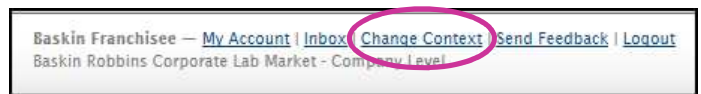
Result:
Your stores appear individually.

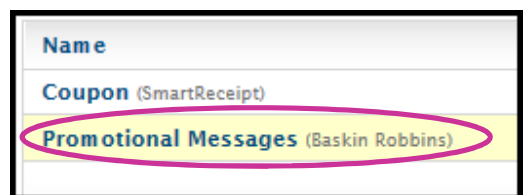5. Click on the store in which you would like to remove a promotional message.
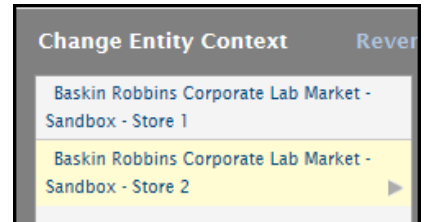
Result: The respective store is listed.

Note: To return to the Parent level and edit content for all stores, click on **Revert Context**.
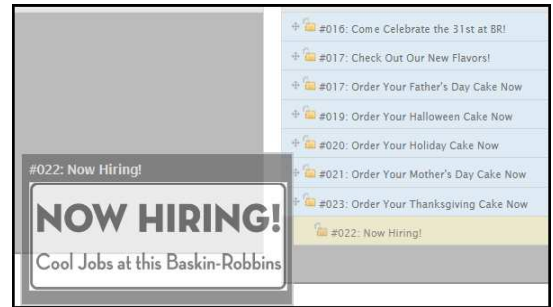

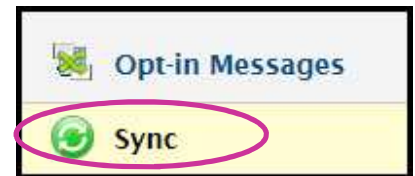6. Click on **Promotional Messages.**

7. Click and drag the offer you want to remove to the right (Opt-out) side.

8. Click **Save** in the top right corner.

9. Click **Sync** on the left.

10. Select your store(s).
    a. You can select multiple stores at once.
11. Click **Sync** at the top.
    a. Syncing new coupons usually takes 3-5 minutes.
    b. The changes will not take effect until they have been synced.

Result: You will be brought back to the main menu and the Optin Count will show the new total number offers currently in effect.

Note: You can Add and Remove coupons or messages during the same session.
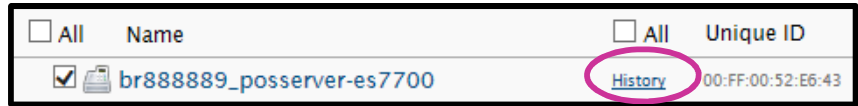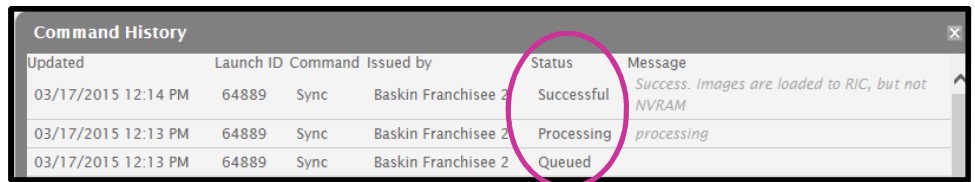
Checking the Sync Status

You can check the status of any sync process at any time.

1. Click on your store.
2. Click on the history link.


Result: The history box opens with the status.

- Successful = sync has completed
- Processing = sync is in progress
- Queued = sync is waiting for the store's software to respond

Scheduling A Sync

You can schedule your coupons and promotions for a later date and time.

1. Opt In and save the respective coupons and/or promotions.
2. Click **Sync** on the left panel.
3. Select the terminal(s) to Sync
4. Click **Sync** on the top panel.

5. Click **Schedule.**
6. Click in the box and either navigate or enter the date AND time of the sync.
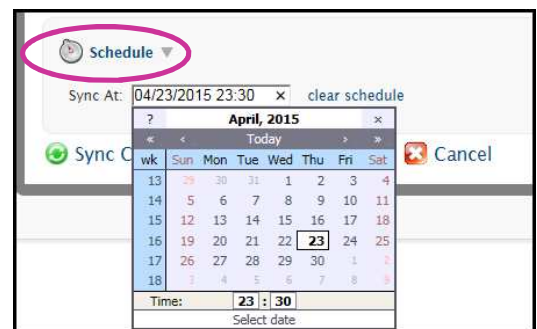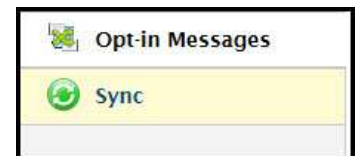
   Note: The time is in military time.

7. Click **Sync Content.**
   Note: The Sync command will show as Queued until scheduled time.


Suggested Practices:
- Sync your store(s) when traffic is slow or the store is closed, as your receipt printer may be unavailable during the Sync.
- Ensure the POS terminal and printer are ON at the time of the Sync.

Redeeming a Coupon

1. Ring in order.
2. Click **Tender.**
3. Scan barcode on coupon.
   Note: you must be on the tender screen for the coupon to scan.
4. Continue with transaction.
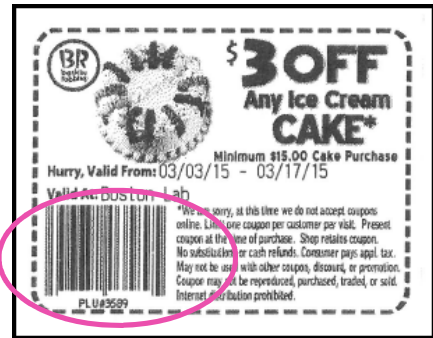
| If…	Then…
The barcode does not scan or the scanner is not working	Look at the offer on the coupon and **match it** with the corresponding offer from the coupon list in the POS system. All Smart Receipt coupons begin with SRM or SRO.

Manually Entering a Coupon

1. Ring in order.
2. Click **Tender.**
3. Click **Coupons.**
   Result: Available coupons display.
4. Identify and click the appropriate coupon.
5. Click **OK.**
   Result: the coupon amount is subtracted from the order.

Submitting a New Coupon or Promotion/Marketing Message Request

1. Go to www.receipt.com.
2. Click **Login** [at the top-right corner of the screen].
3. Log in using credentials.
4. Click **Send Feedback** [at the top-right corner of the screen].

5. Click the dropdown box under **Feedback Type.**
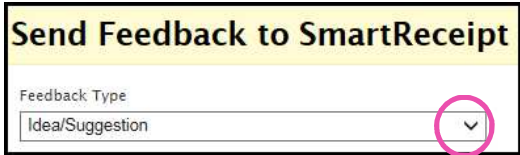
6. Choose the request type. In this example we chose a **Coupon Request**.

7. Complete the **subject** line with the coupon information.

8. Enter a detailed **message**.
   a. Be as specific as possible.

9. Click **Send**.

   Result:

- The offer is reviewed by the Brand and you will be notified by the Baskin-Robbins® Brand Marketing Team.
- If approved, the coupon/promotional the offer will be added to the dashboard on the Opt out side

10. Follow the process for **Adding a Coupon** or **Adding a Promotional** Message to add the new offer.

Note:

- An automated response is generated from SmartReceipt when the Franchisee submits a request.
- The Franchisee will hear from the Brand team within 4 weeks on whether or not the coupon/message requests was approved or denied.
- If a coupon request is approved, it will then go to the Marketing Sub Committee and Profit Sub Committee. This process could take 2-3 months.

SUPPORT

If you have questions or issues, please use the guidelines below for support.

If you have questions or issues about…	Then contact…
Store Operational processes	Your DBI Operations Manager
SmartReceipt Dashboard For example: • I can't login to my SmartReceipt account • How do I find available SmartReceipt coupons?	SmartReceipt Helpdesk • Monday – Friday, 7AM-5PM PST at 866-688-7428 • After Hours and Weekends call 866-688-7428, select option 1 to leave a message for a return call or email support@receipt.com
POS For example: • I cannot redeem a SmartReceipt coupon on my POS • My printer is not printing the SmartReceipt format • How do I activate a coupon in the Back Office?	PAR Helpdesk, 1-800-533-2134, option 1