



# **MyGeniusCentral**

## **User Guide**

### **SmartRewards Loyalty Program**

### **How to Create Customer Lists**

## Introduction

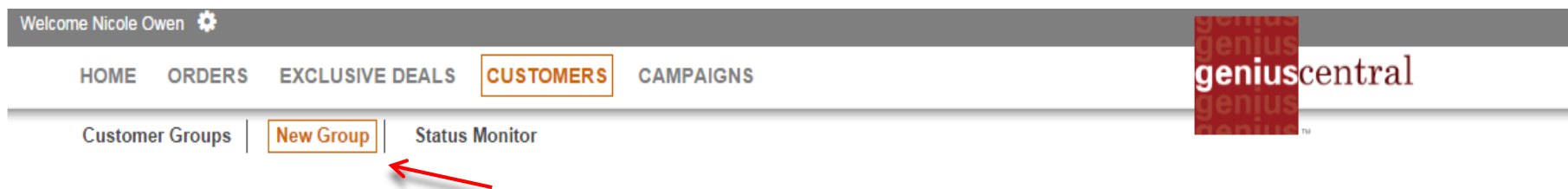
Welcome to **MyGeniusCentral.com**, a cloud-based password-protected website designed to provide retailers with the ability to manage their orders in one central online location. This portion of the user guide will explain how to **create customer lists** in the SmartRewards loyalty program.

The management console for the loyalty program is accessible from [www.MyGeniusCentral.com](http://www.MyGeniusCentral.com). We have set up an account for you on this website.

## SmartRewards – How to Create Customer Lists

As part of your SmartRewards loyalty program, you are able to view customer information like you never have before! With the List Generator in MyGeniusCentral.com, you can create groups of your customers using specific criteria to sort through their data. Then, these groups can be used for marketing campaigns, product and purchasing research and customer demographics.

To access the List Generator, simply hover over Customers in the main menu and select the submenu New Group.



## System and Customer Fields

Here is an explanation of the fields you'll see in the "System" and "Customer" sections of the List Generator:

**List Generator**
0 Downloads - 0 Qualifying Offers

**Lists:**  

Create New List

▼

**System**

**Contact Method:**  
☐ Mobile Phone

☒ Email

☒ Postcard

**Program:**  

All Programs

▼

**Program Points:**  

>

▼

**Customer**

**Zip Code('s):**  

All Zips

▼

**Store:**  

All Stores

▼

**Customer Status:**  

All Customers

▼

**Gender:**  

All Genders

▼

**Age Range:**  

All Ages (and unknowns)

▼

**Birth Month:**  

All Months

▼

**Days since last Visit:**  

>

▼

**AVG days between Visits:**  

>

▼

*Lists* – Choose to create a new list, or select an existing list. If you select an existing list, your criteria will be applied only to customers already in the existing list.

## System Fields

*Contact Method* – The email and postcard boxes are not mutually exclusive, so check both or either of them to get the best results for your list. Always uncheck Mobile Phone.

*Program* – You can select the SmartRewards loyalty program from which you want to pull customers. This is useful for you only if you have multiple programs

### Visits

Has visited store:	times	between:
> <input type="button" value="v"/>	<input type="text"/>	<input type="text"/> and <input type="text"/>
Has not visited store:	times	between:
> <input type="button" value="v"/>	<input type="text"/>	<input type="text"/> and <input type="text"/>
Visits in Top % <input type="button" value="v"/>	times	between:
	<input type="text"/>	<input type="text"/> and <input type="text"/>

### Purchases

Buys:	dollars	between:
> <input type="button" value="v"/>	<input type="text"/>	<input type="text"/> and <input type="text"/>
Does Not Buy:	dollars	between:
> <input type="button" value="v"/>	<input type="text"/>	<input type="text"/> and <input type="text"/>
Purchase in Top % <input type="button" value="v"/>	times	between:
	<input type="text"/>	<input type="text"/> and <input type="text"/>
Brand	Category	UPC List(comma separated)
- Buys - <input type="button" value="v"/>	- Buys - <input type="button" value="v"/>	<input type="text"/>
- Does not Buy - <input type="button" value="v"/>	- Does not Buy - <input type="button" value="v"/>	<input type="text"/>

*Program Points* – You can search for customers with a certain point level. For example, you could search for all customers who have less than 100 points and send them a promotion to let them know they're close to receiving a reward.

## Customer Fields

*Zip Code* – Search for customers in a specific location. You could use this to announce a new store opening in a specific area, or to advertise an event at a single-store location.

*Store* – Customers are assigned to the store where they signed up for your SmartRewards loyalty program. This is not necessarily always by the area or zip code where they live.

*Customer Status* – You can limit your search for active customers or missing-in-action customers. A customer is determined to be active if they have used their card at least once in 52 weeks. Customers are considered MIA if the frequency of visits is interrupted. Visit the Auto-MIA promotion to set the criteria for your MIA customers.

*Gender* – Search by customer gender.

*Age Range* – Search by customer age range. Use this and “Gender” to offer special promotions to specific demographic groups.

*Birth Month* – Create lists based on customers’ birth months. This can be helpful in sending out birthday promotions.

*Days Since Last Visit* – This will limit your search by the customers’ last visit to your store.

*Avg. Days Between Visits* – This will allow you to see how often customers are visiting your store. You may want to send these customers a promotion that will encourage them to come in the store on a more regular basis.

When you do a search in the “System” and “Customer” areas, you will be able to see the search results instantly. Give each of your groups a name and save them to use in campaigns.

## Visits and Purchases

Adding criteria from “Visits” and “Purchases” will increase the wait time for your list to be generated. There is significantly more data to sort through for these categories, so these lists can take more time to be delivered to you. Here is an explanation of the fields under “Visits” and “Purchases.”

### Visits

*Has/has not visited store* – This search feature allows you to narrow the list down to people who have visited or who have not visited your store a certain number of times or within a specific date range (optional). You can send a campaign thanking those customers who visit often, or to encourage the customers who rarely visit the store.

*Visits in top %* – This drop-down menu allows you to see customers who visit the store in a certain percentage or number. You can choose both top and bottom percentage or number. Enter the number or the amount where it says “Times.”

## Purchases

*Buys/Does Not Buy* – You can limit the search to customers who purchase or do not purchase more or less than a certain dollar amount. You may also set the timeframe in which they may or may not have made a purchase in your store by setting the dates (optional).

*Purchase in Top %* – Create lists to see which customers purchase the most in your store. Search for your top 10% and reward them with a special gift or coupon. Similar to visits, you can also see this in number format, as well as view the bottom percentage or specific number.

*Brand\** – This will allow you to see which customers are purchasing specific brands. Use this search feature to see who and how many customers purchased sale items to track effectiveness.

*Category\** – Search by category to see which customers purchased a product and did not purchase a complementary item. For example, search for customers who purchased cereal but did not purchase milk. The categories available in the drop-down list reflect what you have entered in that field in your POS.

*UPC\** – This feature allows you enter a product UPC to see customers who purchased or did not purchase that specific product.

\* Please note: If you are using **LoyaltyGenius** Basic, the information in the fields indicated above with asterisks will not be available.

## For Further Assistance

For further assistance with any aspect of your SmartRewards loyalty program, please contact GeniusCentral support at **800-360-2231** or by email at [CustomerService@LivingNaturally.com](mailto:CustomerService@LivingNaturally.com)