Transferring Third Party Loyalty into RM Loyalty

Contents

Overview

This document covers the actions needed to be taken to upload customer data from MercuryLoyalty to RMLoyalty. The process is simple: obtain Mercury Loyalty customer data, transfer and format data in RMLoyalty CSV file, and finally upload the data into the RMLoyalty Admin web UI. Upon request by the restaurant, Mercury will provide a CSV file for import. The CSV will contain more information than needed for RMLoyalty. To compensate for the difference in data requirements, you copy and paste data from the Mercury provided CSV file into the RMLoyalty CSV file. Hyperlinks to the RMLoyalty CSV Import file are found under the Requirements section of this document. In most copying data between the two CSV files is straight forward. However, in some instances there is no matching data for the RMLoyalty CSV document. In this circumstance, you will just fill in the data for all cells under the appropriatye column. There is also a difference how Mercury Loyalty handles dates. In this case you will have to combine cells using a formula and the copy it into the appropriate cell in the RMLoyalty CVS file. Once the data has been successfully edited between the CSV docs, you can then upload the data into the RMLoyalty.

Considerations

You should have the following in place before you transfer customer data into RMLoyalty

1. An email should be sent out to existing customers of the old loyalty program warning that you plan to switch over to a new loyalty platform. In store marketing can also be used to send the same message. The massage should contain information such as awards programs might change, they will be receiving an email/SMS message asking them to re-register to assign themselves a new password (customer information and points will be ported forward, etc

2. A Welcome Message in the RMLoyalty UI should be crafted that identifies the new program and encourages them to re-register to assign themselves a new password. This is important because RMLoyalty will auto send the Welcome Message the instant the customer data is uploaded.

Requirements

The following is a list of requirements needed to transfer and upload customer data to RMLoyalty.

- Active RMLoyalty Account
- Mercury supplied Customer Data CSV file.
- RMLoyalty.csv document Can be downloaded here:
  - CSV Format
  - Excel Format- will need to convert to CSV format before uploading but contains birth date formula on second spreadsheet.
- Microsoft Excel

Data to Transfer

Below is a chart that matches cell information between Mercury Loyalty and RMLoyalty. There are some instances where data for RMLoyalty does not exist in Mercury Loyalty. Instructions for copying and pasting for each field is outlined below the chart.

Important- the column headings in the RMLoyalty CSV doc must remained intact and should not be changed. Changing the heading cells will result in upload failure in the RMLoyalty Admin Site.

Cell Desciption	Mercury Loyalty Cell	RM Loyalty Cell
First Name	K1	A1
Last Name	L1	B1
Street	M1	C1
City	O1	D1
State	P1	E1
Zip	Q1	F1
Birthdate	W1,V1,U1	G1
Email	F1	H1
EmailSubscribed	No Matching Cell	I1
MobilePhone	H1	J1
MobileSubscribed	No Matching Cell	K1
Last Visit	AB1 (Date needs reformatting)	L1
Total Visits	No Matching Cell	M1
Total Points	C1	N1
Current Points	B1	O1
Active	No Matching Cell	P1
JoinDate	AA1 (Date needs reformatting)	Q1

Data Transferring Instructions

Below are detailed instructions for copy and pasting data between the two loyalty programs.

First Name- Copy the first name of the customer in column "K", starting on cell K2, in the Mercury CSV document. Paste into RMLoyalty CSV document in column "A" starting on cell A2

Last Name- Copy the last name of the customer in column "L", starting on cell L2, in the Mercury CSV document. Paste into RMLoyalty CSV document in column "B" starting on cell B2

Street- Copy the street name of the customer in column "M", starting on cell M2, in the Mercury CSV document. Paste into RMLoyalty CSV document in column "C" starting on cell C2

City- Copy the City name of the customer in column "O", starting on cell O2, in the Mercury CSV document. Paste into RMLoyalty CSV document in column "D" starting on cell D2

State- Copy the State name of the customer in column "P", starting on cell P2, in the Mercury CSV document. Paste into RMLoyalty CSV document in column "E" starting on cell E2

Zip- Copy the Zip code of the customer in column "Q", starting on cell Q2, in the Mercury CSV document. Paste into RMLoyalty CSV document in column "F" starting on cell F2

Birthdate- The birth date in Mercury Loyalty is spread across three columns (W1,V1,U1) . RMLoyalty contains the birth date in only one column. The easiest method to transfer the data will be to combine the columns and the paste in RMLoyalty CSV. Create a new spreadsheet (use new tab at bottom of Mercury Loyalty CSV document)

- Copy the birth date data starting on cell W2 and drag cursor over cells V2 and U2, in the Mercury CSV document. Paste into new spreadsheet.
- In any cell to the right of where customer birth data is, insert the formula =**(B1&"/"&C1&"/"&A1)**. In this formula B1 is the birth month, C1 is the birth date, and A1 is the birth year. You may need to change the cell numbers depending how you copy the birth date data into the new spreadsheet. In our example we copied cells W1, V1, and U1 from the exiting spreadsheet into cells A1, B1, and C1 of the new spreadsheet and insert the formula in cell D1. You will need to copy the formula into all column cells (i.e. column D in our example).

A1	B1	C1	D1
Birth Year	Birth Month	Birthday	Formula
1992	12	24	=(B1&"/"&C1&"/"&A1)

- You must format the cells with the appropriate data format (i.e. 3/14/2001) before copying data over to the RMLoyalty CSV doc
- Once all birth date data has been merged and formatted correctly, Paste into RMLoyalty CSV document in column "F" starting on cell F2.

Email- Copy the email address of the customer in column "F", starting on cell F2, in the Mercury CSV document. Paste into RMLoyalty CSV document in column "H" starting on cell H2

EmailSubcribed- Column "I". There is no matching data in the MercuryLoyalty CSV document. The value in all cells in column I (starting at I2) should be "True". A "False" value will mean the restaurant will not be able to e-mail any of their customers because "False" is interpreted as being opted-out to receive e-mails.

MobilePhone- Copy the mobile phone number of the customer in column "H", starting on cell H2, in the Mercury CSV document. Paste into RMLoyalty CSV document in column "J" starting on cell J2

MobileSubcribed- Column "K". There is no matching data in the MercuryLoyalty CSV document. The value in this field should be "True". A "False" value will mean the restaurant will not be able to send SMS messages to any of their customers because "False" is interpreted as being opted-out to receive SMS text messages.

Last Visit- There is a format mismatch for this field in the MercuryLoyalty CSV doc (lastupdate, column AB) and RMLoyalty. The value in the MercuryLoyalty doc is date plus time. This format should be changed to an mm/dd/yyyy format (i.e. 03/14/2011) before copying into RMLoyalty. After the format change: Copy the last update value of the customer in column "AB", starting on cell AB2, in the Mercury CSV document. Paste into RMLoyalty CSV document in column "L" starting on cell L2.

TotatVisits- There is no matching data in the MercuryLoyalty CSV document. The value in this field should be "1" in all cells under column "M" starting on cell M2.

Total Points- Copy the total point's number of the customer in column "C", starting on cell C2, in the Mercury CSV document. Paste into RMLoyalty CSV document in column "N" starting on cell N2

Current points- Copy the current point's number of the customer in column "B", starting on cell B2, in the Mercury CSV document. Paste into RMLoyalty CSV document in column "O" starting on cell O2

Active- There is no matching data in the MercuryLoyalty CSV document. The value in this field should be "True" in all cells under column "P" starting on cell P2.

JoinDate- There is a format mismatch for this field in the MercuryLoyalty CSV doc (createdate, column AA) and RMLoyalty. The value in the MercuryLoyalty doc is date plus time. This format should be changed to an mm/dd/yyyy format (i.e. 03/14/2011) before copying into RMLoyalty. After the format change: Copy the createdate value of the customer in column "AA", starting on cell AA2, in the Mercury CSV document. Paste into RMLoyalty CSV document in column "Q" starting on cell Q2.

Upload Data in RMLoyalty Web Admin UI

Once the RMLoyalty CSV document is ready, proceed to the Restaurant Manager Loyalty web Admin page. Use the following steps to upload the data:

1. Click on the "Members" menu heading at top of the page
2. Verify you are using the correct Merchant Key account. In most circumstance there will only be one Merchant Key. If more than one merchant key exists, use the drop down menu for the Important Members field to select correct key.
3. Click "Choose File" and navigate to where RMLoyalty CSV doc is located.
4. Click "Upload" button.

The time to upload will vary depending on the size of the import file. A file of 3000 customers may take 10-20 minutes depending on internet speed.