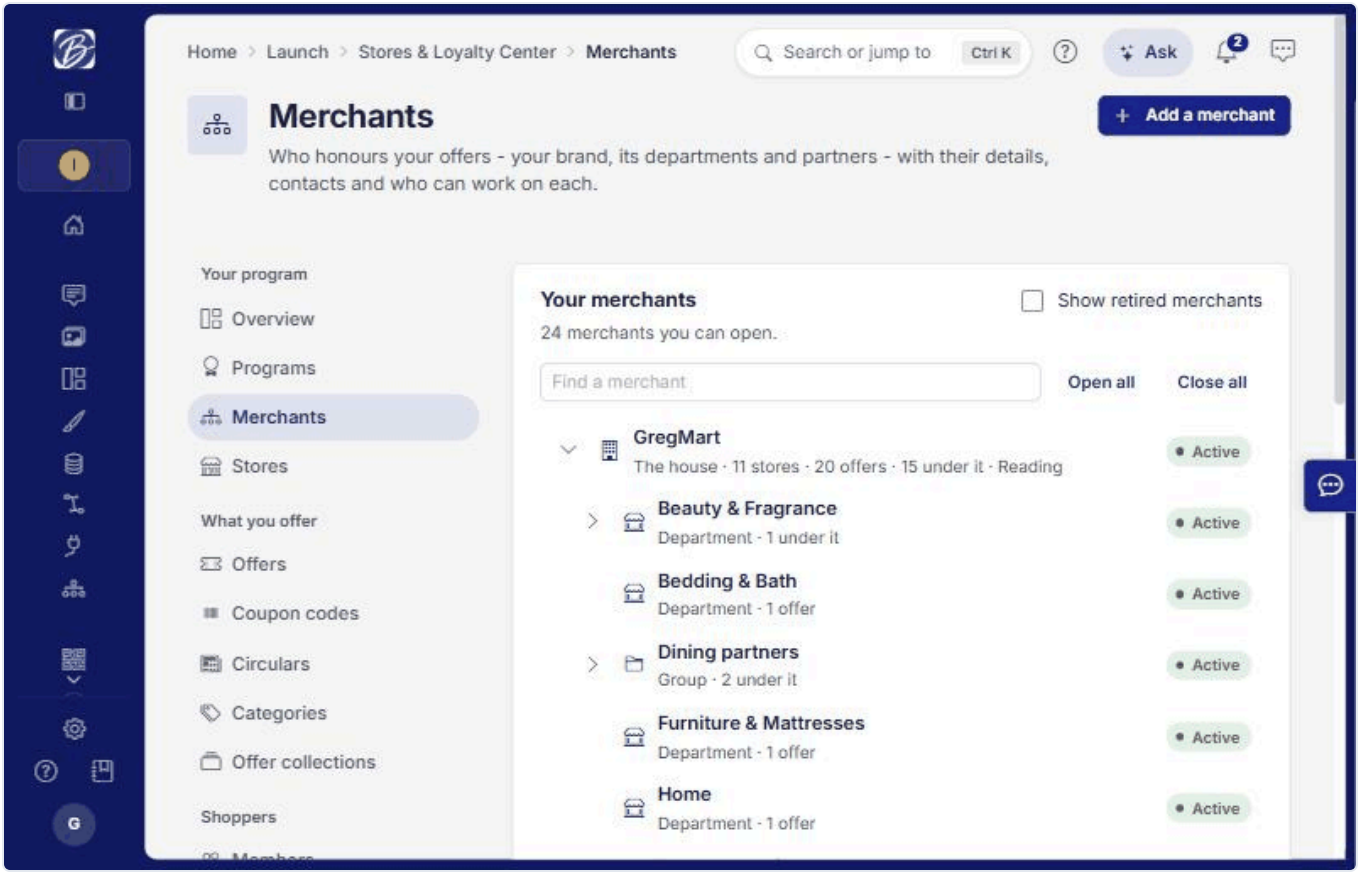
# Merchants

## What this page is for

**Merchants** is where you arrange everyone who honours your loyalty offers. Your brand itself is the first merchant, called the house, and it is made with your program. Under it you add departments, concessions, brands and partners, so a department store can run its cosmetics counter, its home department and the pizza place next door each with its own offers, stores and people.

Each merchant has a page with everything about it: its details and opening hours, the people who work there, who can open it in the Stores & Loyalty Center, the stores it owns and the merchants beneath it. Someone who works for one merchant, such as the head of a department, sees only that merchant and what is beneath it.

## What you see




- *The tree.* **Your merchants**, the house at the top and every merchant beneath it, each with its kind, its status and how many stores and offers it has. **Find a merchant** narrows the tree and keeps each match in its place. **Open all** and **Close all** open or fold every branch.

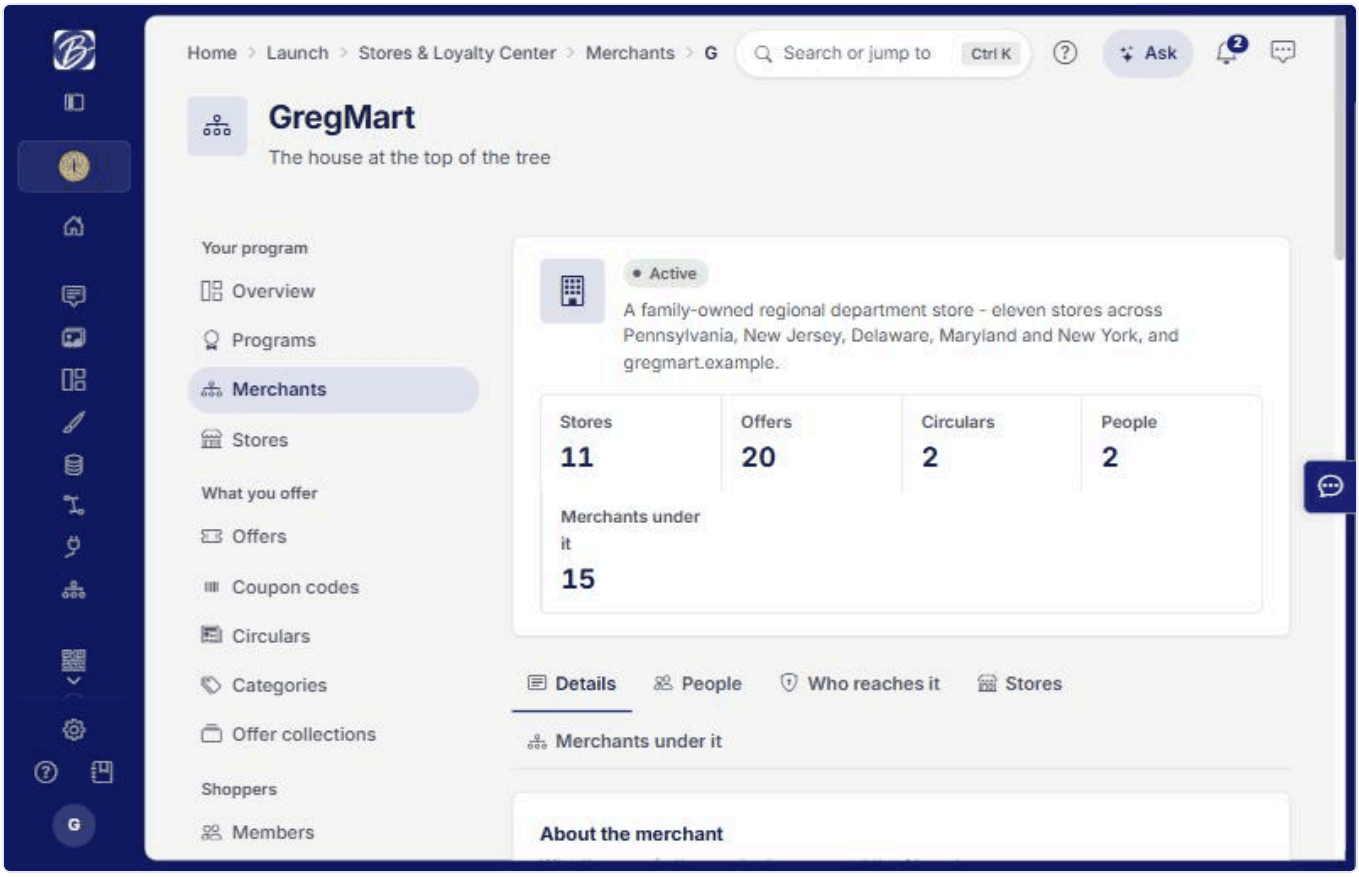
- *If you work for some merchants only.* **You work for** lists your merchants and your role at each, and the tree is titled **The merchants you work for**. You never see the rest of the workspace.
- *A merchant's page.* At the top, the merchant at a glance: its status, **Your role here** when you work for some merchants only, and the figures **Stores**, **Offers**, **Circulars**, **People** and **Merchants under it**. Select the number of stores, people or merchants under it to open that tab. On a wide screen the tree stays beside it, so you can move from one merchant to the next.
- *The tabs.* **Details**, **People**, **Who reaches it**, **Stores** and **Merchants under it**. On **Details**, who the merchant is and where it hangs stay open; the rest is folded, and each folded part says in one line what it holds, such as *Open 6 days a week · 2 holiday changes*. Select **Open** to change it. A part opens by itself when something in it needs a fix.
- *People are named.* Everyone who signs in is shown by name and email, never by a number. A person who holds no loyalty role yet is marked **No loyalty role**: until someone gives them **Loyalty manager** or **Store redeemer** on the Users page, the Stores & Loyalty Center stays closed to them.
- *Where a merchant came from.* A merchant brought in from another system carries a small label naming that system. Its details are kept by that system, so here you can change only **Your note** and the look its coupons wear.

## What you can do

### Add a merchant under another

1. Open the merchant it belongs under. For a department of your brand, that is the house.
2. Open the **Merchants under it** tab and select **Add a merchant under it**.
3. Type its **Name** and choose its **Kind**: a department, a brand, a concession, a franchisee, a partner or a group. Converse fills in the **Short name** for you.
4. Select **Add the merchant**. Its own page opens so you can fill in its details.

## Fill in a merchant's details




1. Open the merchant and stay on **Details**.
2. Under **About the merchant**, set its **Name**, **Legal name**, **Kind** and **Status**, a **Description** shoppers may read, and **What it is, for the AI** in plain words.
3. Under **Pictures**, select **Open**, then **Choose a file** for its **Logo** and **Cover picture** - from your library, a new upload or free stock art - or paste the web address of a picture. You see each picture as soon as you choose it.
4. Under **How to reach them**, select **Open** and add its **Website**, **Phone**, **Email** and address.
5. Under **Social links**, select **Open**, then **Add a link** for each network.
6. Under **Its look**, choose the **Design** its coupons wear from your workspace's published designs, or **The workspace's own look**. Only people who work on designs see the list; anyone else sees which look it wears.
7. Under **Fine print and notes**, select **Open** and write the **Fine print** added to every offer it honours, a **Payout note** for your records and **Your note**.
8. Select **Save**. If something needs a fix, a note appears beside the field, the part that holds it opens, and nothing is saved.

## Set opening hours and holidays

1. On **Details**, find **Opening hours** and select **Open**.

2. For each day, select **Open this day** and set when it **Opens** and **Closes**. Select **Add hours** for a second set, such as a lunch break. A day with no hours is closed.
3. Select **Same as Monday on weekdays** to copy Monday to Tuesday through Friday.
4. Under **Holidays and special days**, select **Add a holiday or special day**, pick the date, and either leave **Closed all day** ticked or set that day's own hours. Say **What the day is**, such as Christmas Day.
5. Select **Save**.

## Move a merchant to another place in the tree

1. Open the merchant and find **Where it hangs** on **Details**.
2. Under **Hangs under**, choose the merchant it should move to. Only the places you may move it to are listed.
3. Read the note: moving a merchant changes who reaches it. People with reach above its old place lose it, and people above its new place gain it.
4. Select **Save**.

If you work for some merchants only, you can move a merchant only where you are owner, here and at both ends of the move.

## Add the people who work at a merchant

1. Open the merchant and the **People** tab.
2. Select **Add a person**, then give their **Name**, **Job title**, **Email** and **Phone**.
3. Choose **What they do here** and their **Standing**. What they do here is a label; what they can open is given on **Who reaches it**. **Standing** is a note for your records: choosing Invited sends nothing - **Invite them to sign in** does.
4. Select **Add the person**.

## Let a person sign in

A person at a merchant, such as your cosmetics buyer, signs in with their own Listrak Converse account. Only someone who runs the whole Stores & Loyalty Center decides who signs in as whom.

*If they have no account yet* (you need to be able to manage Users):

1. On **People**, make sure the person has an **Email**, then select **Invite them to sign in** beside them.
2. Under **Their role in the Stores & Loyalty Center**, keep **Loyalty manager** for someone who runs their merchant's stores and offers, or choose **Store redeemer** for someone who only redeems at the register. Converse suggests the one that fits what they do there.
3. Select **Send the invitation**. Converse emails them the invitation and links them to this person at the same time. If the email already belongs to someone in your workspace, Converse says so and offers **Link them instead**.

*If they already sign in to your workspace:*

1. On **People**, select **Link who signs in** beside the person.

2. Choose them under **Person** - everyone is listed by name and email, and the person whose email matches is chosen for you.
3. Read the warning, then select **Link the account**.

Either way, they then reach nothing until you give them reach on **Who reaches it** - the note that confirms the link takes you there. If you cannot manage Users, the page tells you who to ask, and which email to invite.

Linking limits a person to the merchants you give them reach at, and that limit stays after an unlink. Never link someone who runs the whole program, and never link yourself.

## Decide who reaches a merchant

1. Open the merchant and the **Who reaches it** tab. The four roles are explained at the top: **Can view**, **Can redeem**, **Can edit** and **Owner**.
2. Select **Give someone reach**, choose the **Person** and their **Role here**, then select **Give reach**.
3. To change a role, select **Change** beside the person, choose the role and select **Save**. To take it away, select **Take reach** and confirm.

Reach given at a merchant covers every merchant beneath it too. The last owner of a merchant cannot be taken away or lowered until someone else is owner.

## Give someone the whole workspace back

A person who was linked as one of a merchant's people stays limited to their merchants after the link is gone. If they are left reaching nothing, the Stores & Loyalty Center shows them an empty page until someone gives the whole workspace back.

1. On **Who reaches it**, select **Their whole reach** beside the person to see every merchant they reach and since when. After you take someone's reach, unlink them or remove them, where they now stand appears on its own.
2. To look anyone up, go to **Merchants**, find **Check someone's reach** and select **Look someone up**, then choose the **Person**.
3. When they reach nothing, select **Give back the whole workspace** and confirm. If they still sign in as one of a merchant's people, or still hold reach somewhere, Converse says which to undo first.

Only someone who runs the whole Stores & Loyalty Center sees a person's whole reach.

## Retire a merchant

1. Open the merchant and select **Retire**, then confirm with **Retire**.
2. If merchants, stores, offers, circulars or collections still belong to it, Converse says so and keeps it. Move or retire those first. The house always stays.

## How it fits

Every offer, deal and circular names the merchant that honours it, and every store belongs to one merchant. The tree decides who can work on what: a department head given reach at their department sees their department's offers, stores and numbers and nothing else, and the people at the register redeem only at their own stores. The Stores page lists every store, and each merchant's **Stores** tab lists its own.

## Good to know

- The house is made when you make your program on the Programs page. Until then the tree is empty.
- The tree goes at most four levels below the house, and a merchant can never sit under itself or one of its own merchants.
- A merchant's people are staff, never members of your program.
- **Show retired merchants** brings retired merchants back into the tree so you can read them.
- If a list or a page cannot be read, it says so and offers **Try again**. Nothing is guessed.

## Related pages

- Stores & Loyalty Center: the program, its tiers and the overview.
- Stores: every store, its hours, its pin on the map and its stories.
- Users: invite the people who will sign in and give them their roles.