Loyalty Club

The primary aim of the Loyalty program is to entice your customers back to your store by offering them a discount after a certain number of purchases or a certain amount spent. This is achieved by accruing points based on the purchase price of the items until either a set amount of points is reached or a set amount of purchases are made. The accrued points may then be used as a discount amount off a further purchase.

There are five areas to decide upon and set up to operate a loyalty program.

- Default points on the Category Codes.
- Options in System Defaults.
- Options in Station Defaults
- Set Customers as Club members.
- Set points on existing stock items.

Set the defaults on the Category Codes.

1) Select Alt A Admin from the Main Menu**.**
2) Select F7 Stock.
3) Select F2 Categories.
4) Highlight the required Category and select Alt C Change.

Loyalty Club Eligible	Check to enable loyalty for this category. If left unchecked, no product within this category will accrue points regardless of any other setting.
Loyalty Club Min $	Any item within this category below this amount will not attract points. This is an optional setting, if left blank all items within this category will accrue points as set on the individual stock item.
Loyalty Club Points %	The default percentage for new stock. This will only affect new stock being added, not existing stock items.

Set Up Options In System Defaults

1) Select Alt A Admin from the Main Menu.
2) Select F2 System
3) Select Alt L Loyalty.

Loyalty Club Style

Not Used	Loyalty is disabled.
Points	Redemption is based on the number of points accrued.
Qty	Redemption is based the number of purchases.

Rule 1 & Rule 2 & Auto Min $

A reminder for operators to ask the customer if they are loyalty club members. When a sale is made for an item at or above the Auto Min $ amount, and a loyalty member has not been selected, the operator is prompted with the default message, 'Item(s) are eligible for Loyalty Club. Update Club Details?'. If the Auto Min $ is left blank no prompt is given. Rules 1 & 2 allow you to input your own message to override the default message.

Default Points %
Overall system default for points % on all stock items. Settings on the Category Codes will override this.

Required
The required points or purchase quantity required before the points are redeemable, e.g. 30 points or 10 purchases.

Expiry Months
The number of months for which the points are valid.

Allow Adjustments
Tick to allow manual adjustment to customers accrued points.

Points Decimal Places
Zero, One, Two   Rounds the accrued points,
                  e.g. 10% on $28.90 - Zero = 3 points, One = 2.9 points, Two = 2.89 points

Points Rounding
If zero decimal places is selected, round up or down to a whole digit.

Set loyalty program options in Station Defaults.

    1) Select Alt A Admin from the Main Menu.
    2) Select F3 Station.
    3) Highlight the required station.
    4) Select Alt C Change.
    5) Select the Details 2 Tab

Display Club Points Update   Optional setting. If checked, at the completion of a club sale a prompt will display showing the points accrued for that customer.

Set each customer as a Loyalty Club Member.

For a customer to accrue loyalty points their account must be flagged for club membership.
    1) Select F10 Customers from the Main Menu.
    2) Find the Customer, then Alt V to View.
    3) Ensure that the box - Loyalty Club - is ticked**.**

Setting Points On Stock Items

The points able to be accrued on any item are held against each stock item individually. These may be edited or altered individually or mass updated using the 'Stock Tagging' facility.

() Refer to the Operation - Stock manual and also the Operation - Stock Tagging\ manual for information on editing points percentages.

The points are based on a percentage of the purchase price, i.e. 10% points on a $28.95 item will accrue 2.9 points, (or 3 points if rounding is used).

This allows you the flexibility to set differing points against product with different profit margin, hopefully to encourage purchases of higher profit items.

As an example, you might set your points by the following formula...

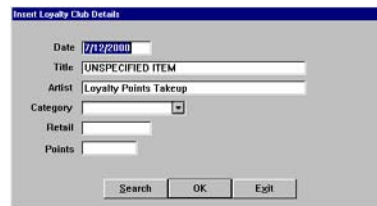|		
Normal price CD's (any price with full margin)	10%	$28.95 = 2.90
	10%	$18.95 = 1.90
Discounted Chart/ New Release CD's	5%	$24.95 = 1.25
Sale/ Markdown CD's	Nil	Nil
Accessories (Headphones, Storage etc.)	15%	$19.95 = 2.99
T-Shirts and Posters	10%	$29.95 = 3.00
Videos & DVD's	5%	$34.95 = 1.75
Blank Tapes	20%	$4.95 = 0.99

Modifying A Customers Accrued Points

Manual Adjustments

If you have enabled 'Allow Adjustments' in the System Defaults, any customers accrued points may be manually adjusted up or down.

1. Select F10 Customers from the Main Menu.
2. Find and highlight the required customer
3. Select Alt L Loyalty
4. Input required adjustment. If reducing points, enter a negative quantity, e.g. -2.
5. Select OK

Forcing A Completed Sale Onto Loyalty

If you have completed a sale but neglected to select the customer, you can 'push' the sale onto their club from the Transaction Log.

1. Select Alt T Trading from the Main Menu.
2. Select F3 Tran. Log
3. Find and highlight the transaction.
4. Select Alt L Loyalty.
5. Find and highlight the customer.
6. Select Alt S Select.

Sales And Point Redemption's

Loyalty Club sales are performed in much the same manner as fully paid sales, with the addition of selecting the customer after inputting the items. Account sales will automatically be included on the loyalty club if the selected customer is a loyalty member.

Steps:

1. Input a valid Operator ID.
    - ☞ The transaction indicator will display SALE and the Control Menu will change to the Main Menu.

2. Input the item(s) using any of the described input methods.
    - ☞ The Main Menu will change to the Sales Menu.

3. Apply any price changes required.

4. Select F5 for Loyalty from the Sales Menu.
    - ☞ This calls the Customer Browse screen.

5. Select or Add the customer.
    - ☞ This brings you back to the sales screen with the customer name in the Customer Detail Field.

6. Subtotal (press the + key on the numeric pad).

7. Select the tender type.

8. Enter the amount tendered if Cash, or enter on the existing amount if the amount is correct.

📖 Depending on options selected in Admin-Station Settings-Details 2, a confirmation window may open showing the loyalty status for that customer and the points added for the current transaction.

Loyalty Redemption

Redemption is virtually automatic. Once a customer has accrued the points or quantity required, at the <u>next</u> sale for that customer a prompt will open to inform the operator that redemption is available. A Yes /No option allows the redemption to be applied or continue accrual until the next purchase.

Special Promotions

The flexibility of maintaining the points per item allows you to modify the points value per item or group of items for promotional periods. For instance, as a special promotion you could offer double points on Soundtracks for a period. Simply 'Tag' all your soundtracks and mass update the points to double the normal. When the promotional period is over, once again tag your soundtracks and mass update back to the normal amount. The possibilities are endless.

✆ Refer to the Operation - Stock Tagging manual for instruction on tagging and mass updating.