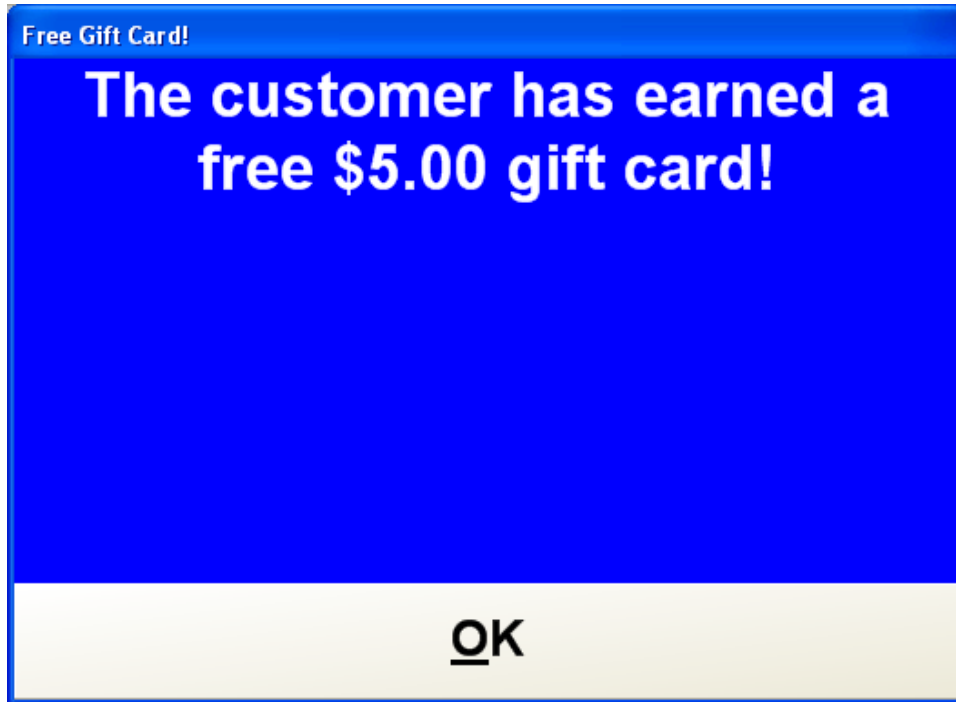

Customer Loyalty - Detailed



Overview

Customer Loyalty is great way to get repeat customers and increase sales. By offering your customer incentives to shop in your store, they will have a more enjoyable and rewarding shopping experience.

Customer Loyalty in CRE is used in conjunction with the Customer Maintenance screen and Bonus Points. In order to set up a loyalty plan you will need to do the following:

- A customer with an open account must be setup in Customer Maintenance.
see: [Creating a Customer](#)
- We will then create a loyalty incentive (the bonus you give the customer when they achieve a certain goal).
see: [Configuring a Loyalty Incentive](#)
- We will then create a loyalty plan (the bonus you give the customer when they achieve a certain goal).
see: [Configuring a Loyalty Plan](#)
- We will then add the incentive to a plan (similar to adding modifiers to a modifier group).
see: [Adding a Loyalty Incentive to a Loyalty Plan](#)
- We will then add the loyalty plan to the customer it will apply to (adding the modifier group to the standard item).
see: [Associating a Loyalty Plan to a Customer](#)
- We can then set some other options:
[Setting a Default Loyalty Plan](#)
[Assigning Bonus Points to Individual Items](#)
[Make Bonus Points Correspond to Dollars Spent](#)
- [Using Customer Loyalty Including Selecting a Customer for the Invoice](#)

Creating a Customer

Manager

Options

1. Select the **Manager** or **Options** button.
2. Enter the administrator password (default: admin) where applicable.
3. Select **Administrative** then, **Customer Maintenance**.

Customer Maintenance
This Customer All Customers Print Customer Labels Keyboard

Customer # 8459200880 First Name PCA Last Name Customer E-mail Address

General Info Extended Info Account Info Shipping/Billing History Notes Properties

Company Name Primary Phone # Bonus Points Achieved
Street Address Alternate Phone # Birthday
Street Address 2 City Application Date
5/26/2009
State Zip Code County Card Swipe IDs
Add Del
Discount Percentage Discount Level A NONE
 Charge At Cost Tax Exempt Print Notes on Receipt

Previous Next Save Delete Update Cancel

4. At the **Customer Maintenance** screen select **Add**.
5. Enter the following required information:
 - **Customer Number** (tip: Use the phone number as the customer number for easy reference).
 - **First Name**.
 - **Last Name**.
6. If applicable fill in the information under **General Info**.

Customer Maintenance
 This Customer All Customers Print Customer Labels Keyboard

Customer # 8459200880 First Name PCA Last Name Customer E-mail Address

General Info Extended Info **Account Info** Shipping/Billing History Notes Properties

Account Type
 Standard
 Layaway

Open Account Date 5/26/2008
 Close Account Date 5/26/2100

Balance Due \$0.00

Default Salesperson
 Membership Expiration

Credit Limit
 Max Balance \$150.00
 Restrict spending to \$0.00 over days starting

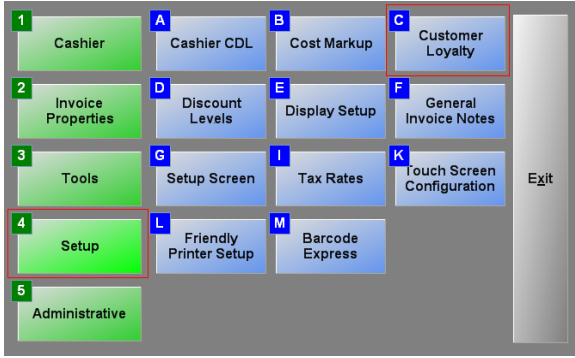
Require PO # Entry

Authorized Members

7. Select the **Account Info** tab.
8. For **Account Type**:
 - Select **Standard** to have a customer with a standard account.
 - Select **Layaway** to have a customer available for the Layaway features of the software.
9. Under **Open Account Date** select the **O** which will fill in today's date. This is the recorded date when the account was opened.
10. Under **Close Account Date** select the **C** which will fill in today's date which you will change until a later date in time. This is useful for limiting the amount of time that the account can be open.
11. Select **Save** and then select **Exit**.

Configuring a Loyalty Incentive

To set up a loyalty plan, open CRE/RPE, select **Manager**, provide the requested credentials, and then follow these steps.



1. Select **Setup** and then **Customer Loyalty**.



2. Select **Loyalty Incentives**.



3. Select **Add**.

Loyalty Incentives

Description	Incentive Type
<input type="text"/>	Points Reward
Redeem points for discounted or free item.	<ul style="list-style-type: none"> Points Reward Birthday Bonus Frequency Discount Fire Coupon\Item

4. Provide a description for the incentive and select its type.

- **Points Reward** encourages the collection of points so that they can be redeemed for a free or discounted item, a gift card, or a voucher. For instructions on how to set up bonus points, see the appropriate section of this document.
- **Birthday Bonus** gives a customer one of the aforementioned rewards on or around their birthday.
- **Frequency Discount** gives a customer one of the aforementioned awards if they visited the store and made purchases multiple times within a specified time window.
- **Fire Coupon\Item** adds an item or coupon to every invoice when **PAY** is selected.

Give reward after how many points? Points

or

Within how many days of birthday? Days

or

Give reward within how many days? Days

or

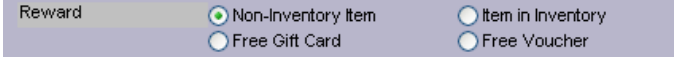

Select Coupon\Item

5. If **Points Reward** was selected in step 4, specify how many points are needed for a reward.

If **Birthday Bonus** was selected, specify the window around the customer's birthday during which they can receive the award.

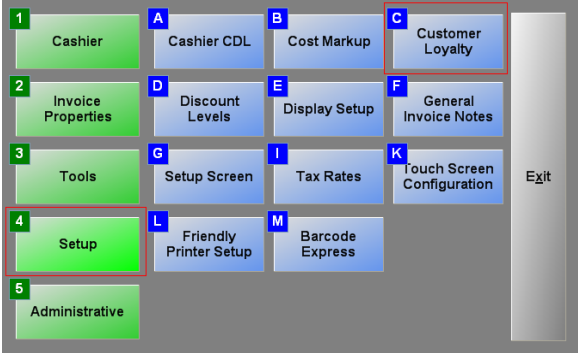


If **Frequency Discount** was selected, specify the time window for the customer to revisit the store and purchase something in order to receive the reward.

If **Fire Coupon\Item** was selected, select the coupon or item to be added to every invoice.

	<p>6. Select a reward.</p> <ul style="list-style-type: none"> • Non-Inventory Item: select this if you would like the reward to be an item that is not part of your inventory. • Item in Inventory: select this if you would like the reward to be an item in your inventory. • Free Gift Card: select this you would like the reward to be a gift card. • Free Voucher: select this if you would like the reward to be a store credit.
<p>7. If Item in Inventory was selected in step 6, specify the item number, the price (could be discounted or \$0) for it, the cost, and which taxes (if any) apply to this price.</p> <p>If Free Gift Card or Free Voucher was selected, specify the value of the gift card or voucher.</p>	
	<p>8. Select Save and then Exit.</p>
<p>9. Repeat the steps of this section for every incentive which you would like to offer.</p>	

Configuring a Loyalty Plan

To set up a loyalty plan, open CRE/RPE, select **Manager**, provide the requested credentials, and then follow these steps.

 <p>A screenshot of a software menu. On the left, there is a vertical list of categories: 1 Cashier, 2 Invoice Properties, 3 Tools, 4 Setup, and 5 Administrative. The 'Setup' category is highlighted with a red box. To the right of this list are several menu items arranged in a grid, each with a letter label in a blue box: A Cashier CDL, B Cost Markup, C Customer Loyalty, D Discount Levels, E Display Setup, F General Invoice Notes, G Setup Screen, I Tax Rates, K Touch Screen Configuration, L Friendly Printer Setup, and M Barcode Express. The 'Customer Loyalty' item is highlighted with a red box. An 'Exit' button is located on the far right.</p>	<p>1. Select Setup and then Customer Loyalty.</p>
 <p>A screenshot of a 'Question Box' dialog. The title bar says 'Question Box'. The main text asks 'Which would you like to set up?'. There are two buttons: 'Loyalty Incentives' and 'Loyalty Plans'. The 'Loyalty Plans' button is highlighted with a red box. There is also a 'Cancel' button at the bottom left.</p>	<p>2. Select Loyalty Plans.</p>
 <p>A screenshot of a single green button with the text 'Add' in white.</p>	<p>3. Select Add.</p>

Loyalty Plans Keyboard

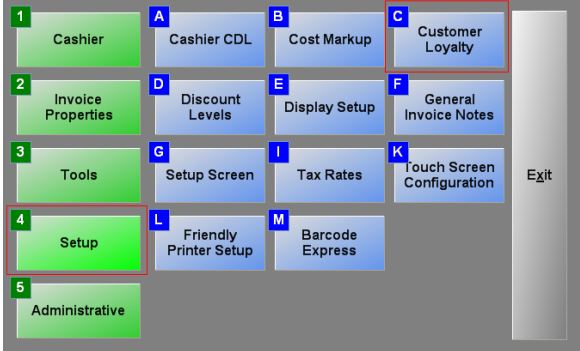

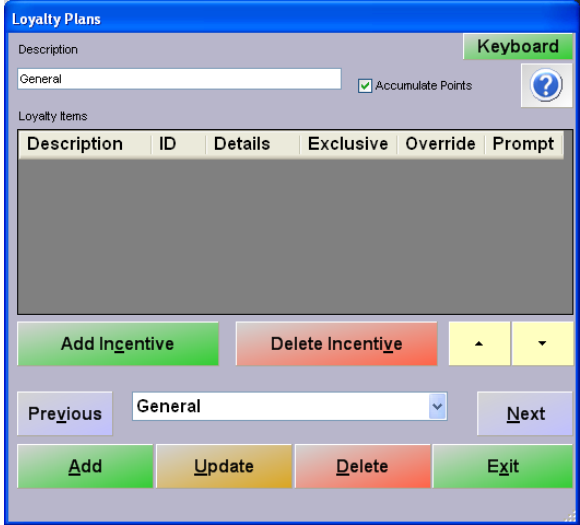
Description
 Accumulate Points ?

Loyalty Items

Description	ID	Details	Exclusive	Override	Prompt

4. Provide a description for the loyalty plan.
5. Check **Accumulate Points** if your incentive was setup as a Point Reward (step 4 of the previous section). This option will record the points that have accumulated.
6. Select **Save**.

Adding a Loyalty Incentive to a Loyalty Plan

 <p>A screenshot of a software menu. The menu items are arranged in a grid. A vertical column of green boxes on the left is numbered 1 to 5. A horizontal row of blue boxes at the top is lettered A to M. The 'Setup' button (row 4, column 1) and the 'Customer Loyalty' button (row 1, column 4) are highlighted with red boxes.</p>	<p>1. Select Setup and then Customer Loyalty.</p>
 <p>A dialog box titled 'Question Box' with the text 'Which would you like to set up?'. It contains two blue buttons: 'Loyalty Incentives' and 'Loyalty Plans'. The 'Loyalty Plans' button is highlighted with a red border. A red 'Cancel' button is at the bottom left.</p>	<p>2. Select Loyalty Plans.</p>
 <p>A screenshot of the 'Loyalty Plans' screen. It has a 'Description' field with 'General' and a checked 'Accumulate Points' box. Below is a table with columns: Description, ID, Details, Exclusive, Override, Prompt. At the bottom, there are buttons for 'Add Incentive' (green), 'Delete Incentive' (red), and navigation buttons 'Previous', 'Next', 'Add', 'Update', 'Delete', 'Exit'.</p>	<p>3. Select Add Incentive.</p>

Which incentive would you like to include in this plan?

A dialog box with a light beige background. At the top, the text reads "Which incentive would you like to include in this plan?". Below this, there is a blue rectangular button labeled "Frequent Buyer". At the bottom of the dialog, there are two buttons: a red "Cancel" button on the left and a green "Select" button on the right.

4. Select an incentive that you created earlier.

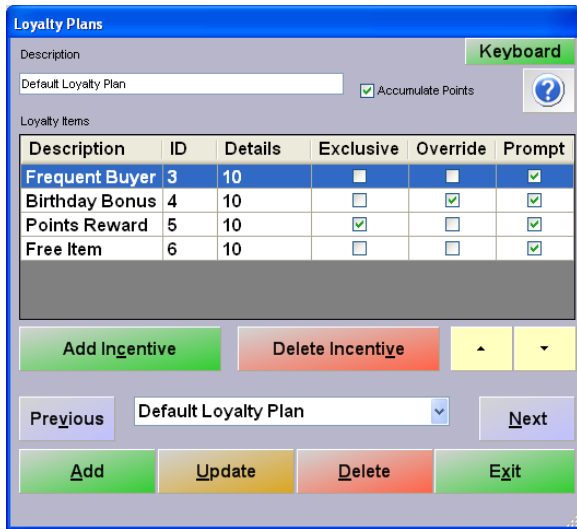
The "Loyalty Plans" application window. At the top, there is a "Description" field containing "Default Loyalty Plan" and a "Keyboard" button. A checkbox labeled "Accumulate Points" is checked. Below this is a table titled "Loyalty Items".

Description	ID	Details	Exclusive	Override	Prompt
Frequent Buyer	3	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Below the table are buttons for "Add Incentive" (green), "Delete Incentive" (red), and two yellow arrow buttons. At the bottom, there are "Previous" and "Next" buttons, a dropdown menu showing "Default Loyalty Plan", and a row of four buttons: "Add" (green), "Update" (yellow), "Delete" (red), and "Exit" (green).

5. Select **Update**.

Repeat steps 2-5 to add more incentives to the loyalty plan.



- **Exclusive** - Selecting this option will add priority to the incentives that it is selected for. If you would like to have all the incentives in the list to have the same priority (will follow the order that they are listed) then either check or uncheck all the incentives in the list (**Note:** if all the options are unchecked in the list then they can all be redeemed on one transaction). With this option selected the first incentive that is selected in the list, will be the only incentive that can be redeemed, unless Override is enabled for other incentives.
- **Override** - Selecting this option will make the incentive available even if another incentive is set as Exclusive.
- **Prompt** - With this option checked the cashier will be prompted if the loyalty incentive would like to be redeemed at this time. If this option is unchecked for any incentive it will automatically be added to the invoice when selecting PAY at the invoice screen.




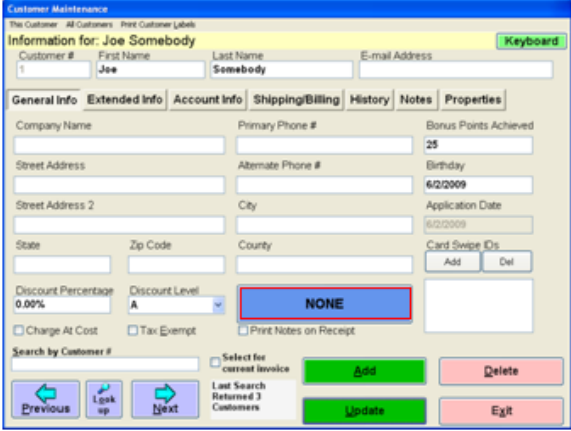
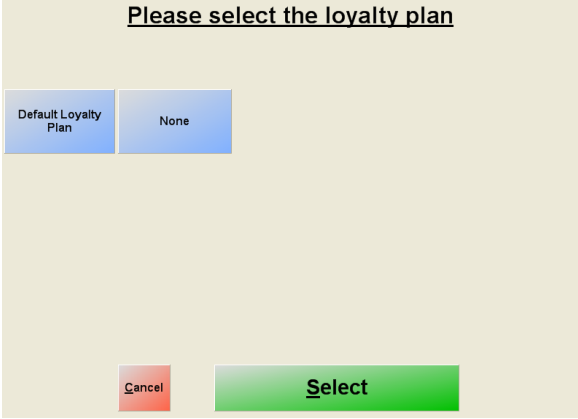


6. Select an incentive and then the up or down arrows in order to adjust the order in which the cashier will be prompted about it. The first incentive listed is the one with the highest priority.



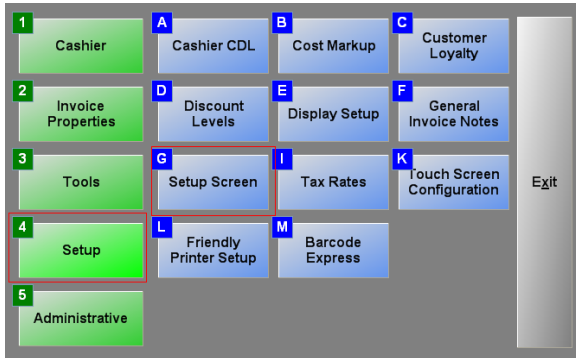
7. Select **Update** when finished.

Associating a Loyalty Plan to a Customer

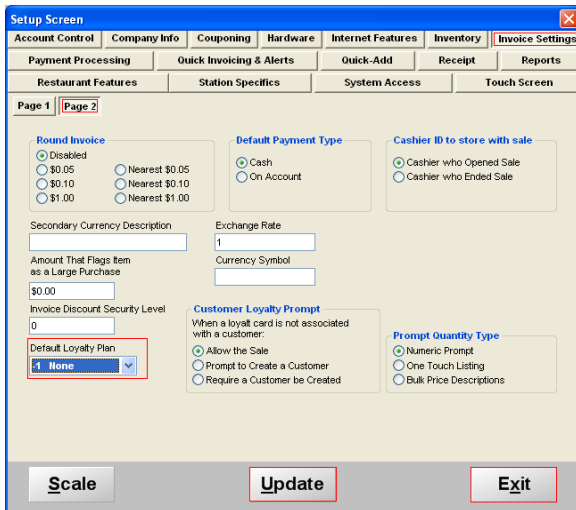
To associate a loyalty plan to a customer, select **Manager** from the login screen, provide the requested credentials, and follow these steps.

	<p>1. Select Customer Maintenance.</p>
	<p>2. Select a customer.</p> <p>3. Select the blue box containing the text NONE.</p>
	<p>4. Select the loyalty plan that we created.</p>
	<p>5. Select Update.</p>
	<p>6. Select Exit.</p>

Setting a Default Loyalty Plan



1. After selecting **Manager**, select **Setup** and then **Setup Screen**.



2. Select **Page 2** of **Invoice Settings**.
3. Change **Default Loyalty Plan** from **None** to the plan which you would like to be the default.
4. Select **Update**.
5. Select **Exit**.

Assigning Bonus Points to Individual Items

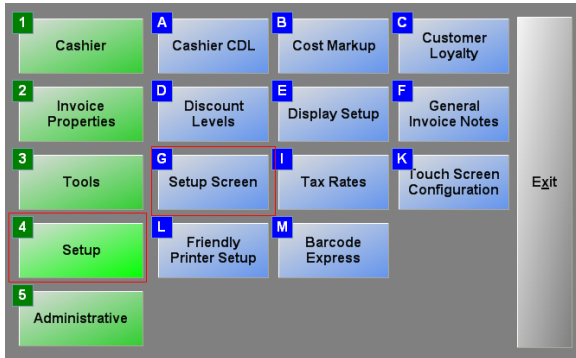


1. After selecting **Manager**, select **Administrative** and then **Inventory Maintenance**.

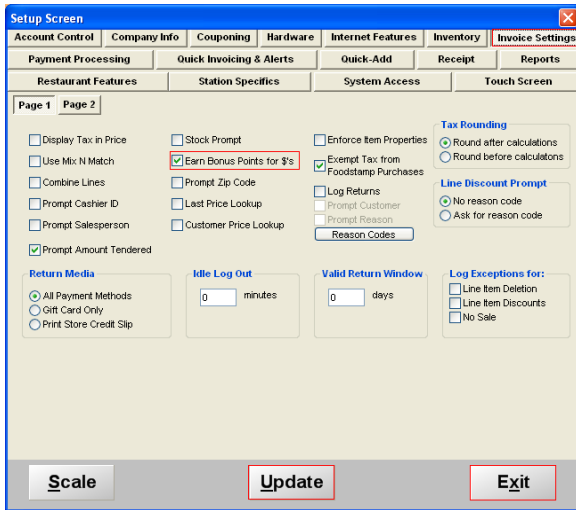
Inventory Maintenance
 Item: EGG CHEESE CROS
 Department for this Item: BREAKFAST
 Item Number: BREAK1
 Description: EGG CHEESE CROS
 Avg Cost: \$0.50000
 Price you charge: \$1.19
 Price with tax: \$1.19
 # In Stock: 4
 Tax: Tax 1, Bar Tax, Tax 2, Tax 3
 Options: Bonus Point 0, # Barcodes 0, Alternate SKUs Tag Along Items
 Commission: % of Gross Profit 0.0%
 Search by Item Number: Profit% 138.0%, Retail Discount 0%, Gross Margin 57.963%
 Buttons: Previous, Look up, Next, Add Item, Save, Transfer, Instant PO, Duplicate, Delete, Exit

2. Select an item and modify its **Bonus Point** field.
3. Select **Save**.

Make Bonus Points Correspond to Dollars Spent



1. After selecting **Manager**, select **Setup** and then **Setup Screen**.

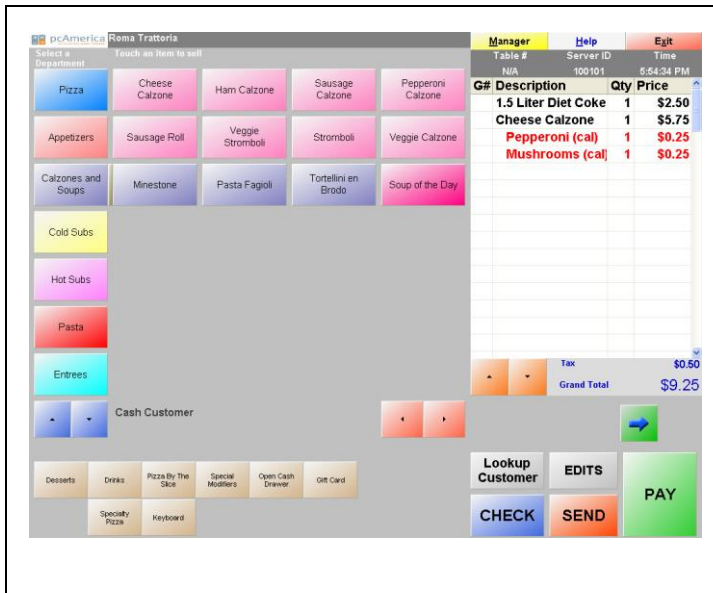


2. Select the **Invoice Settings** tab.
3. Check **Earn Bonus Points for \$'s**.
4. Select **Update**.
5. Select **Exit**.

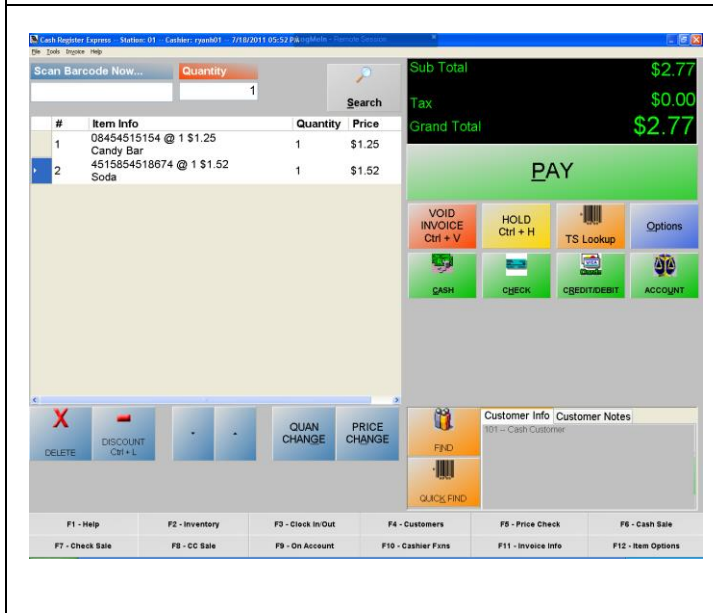
Using Customer Loyalty Including Selecting a Customer for an Invoice

In this example we have created two loyalty incentives (one that will be triggered after 10 bonus points have been achieved and the other at 20 points) which will prompt when they are achieved.

Selecting a customer when creating invoices is necessary for loyalty plans to work. You can do this from the invoicing screen of either CRE or RPE.



1. Add the items to the invoice that your customer is purchasing.

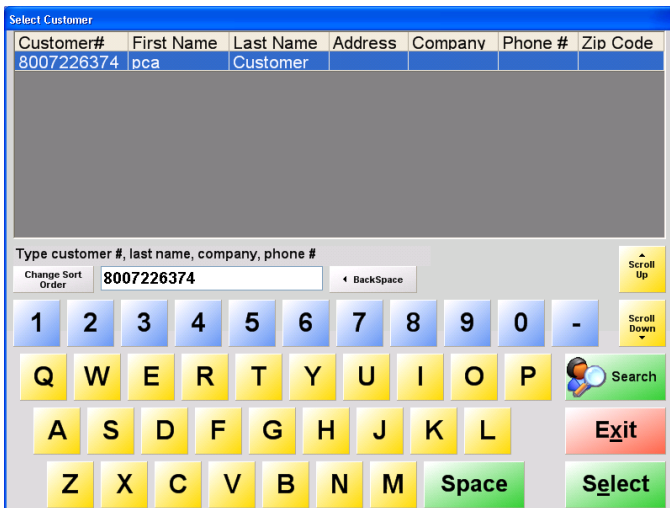


**Lookup
Customer**

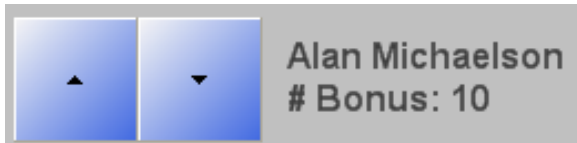
or



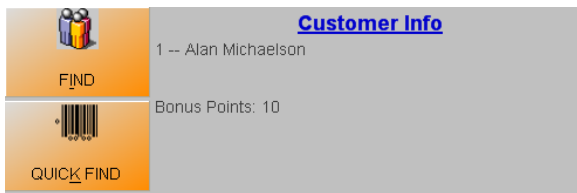
2. Select **Lookup Customer** in RPE or **FIND** in CRE.



3. Enter search terms.
4. Select **Search**.
5. Highlight a customer on the list.
6. Select **Select**.



or



7. In RPE, the customer's information will be located below the items on the touch screen. (top left)

In CRE, the customer's information will be located near the **FIND** button. (bottom left)



8. After items are added to the invoice and **PAY** is selected, bonus points may be accumulated and rewards may be offered.

Question Box

Bonus Available!

Type: Points Reward

Bonus: test1

Would you like to apply this?

Yes

No

9. In this example after the customer has reached 10 points the cashier will be prompted if the incentive would like to be redeemed.

Note: When this incentive is redeemed the points will get subtracted from the total points earned (for example, if the selected customer started with 15 points, and this incentive is redeemed the customer will be left with 5 points).

To Reach the 20 point incentive (below) the cashier will need to select No when prompted about this incentive. This will allow the points to cumulate to the next incentive point value.

Question Box

Bonus Available!

Type: Points Reward

Bonus: test2

Would you like to apply this?

Yes

No

10. In this example after the customer has reached 20 points the cashier will be prompted if the incentive would like to be redeemed.

Note: When this incentive is redeemed the points will get subtracted from the total points earned (for example, if the selected customer started with 25 points, and this incentive is redeemed the customer will be left with 5 points).