Customer Loyalty - Simple

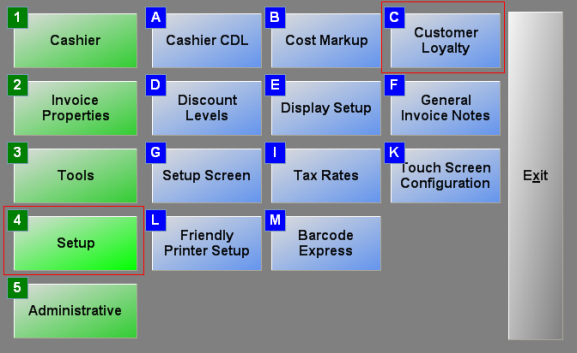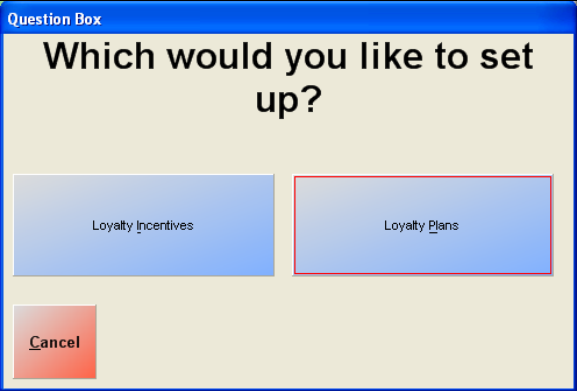**Question Box**

Which would you like to set up?
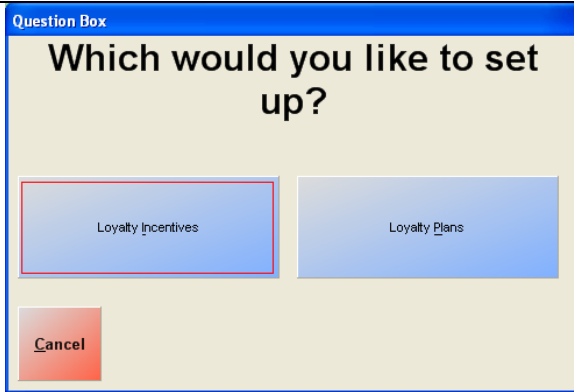
Loyalty Incentives   Loyalty Plans

Cancel

Setting up a loyalty plan

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 Plans**.
	3. Select **Add**.
	4. Provide a description for the loyalty plan. 5. Check **Accumulate Points** if one of your incentives will be point-based. 6. Select **Save**. 7. Select **Exit**.

Setting up a loyalty incentive

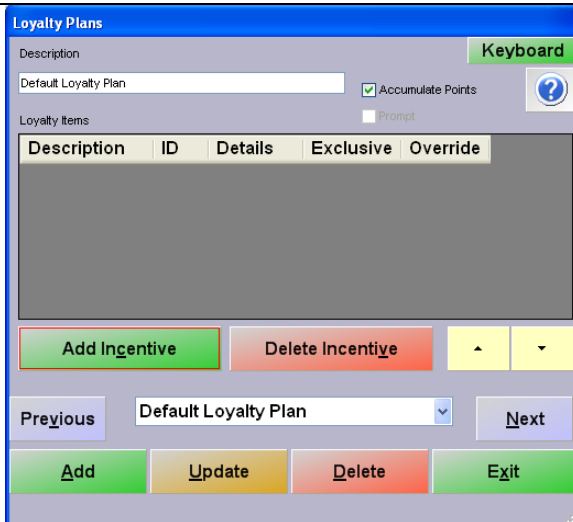|	
1. See step 1 in the above section.	
	1. Select **Loyalty Incentives**.
	2. Select **Add**.
	3. Provide a description for the incentive and select its type. • **Points Reward** encourages the collection of points so that they can be redeemed for a free or discounted item, a gift card, or a voucher. 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? `10` Points or Within how many days of birthday? `10` Days or Give reward within how many days? `10` Days or Select Coupon\Item	4. If **Points Reward** was selected in step 3, 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.
Reward ● Non-Inventory Item ○ Item in Inventory ○ Free Gift Card ○ Free Voucher	5. Select a reward. • **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.
6. If **Item in Inventory** was selected in step 5, specify the item number, the price (could be discounted or $0) for it, and which taxes (if any) apply to this price. If **Free Gift Card** or **Free Voucher** was selected, specify the value of the gift card or voucher.	
Save	7. Select **Save** and then **Exit**.
8. Repeat the steps of this section for every incentive which you would like to offer.	
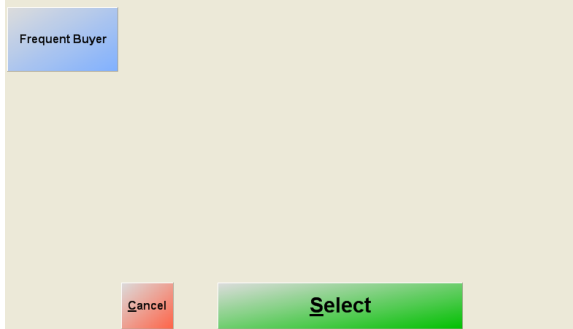
Adding a loyalty incentive to a loyalty plan

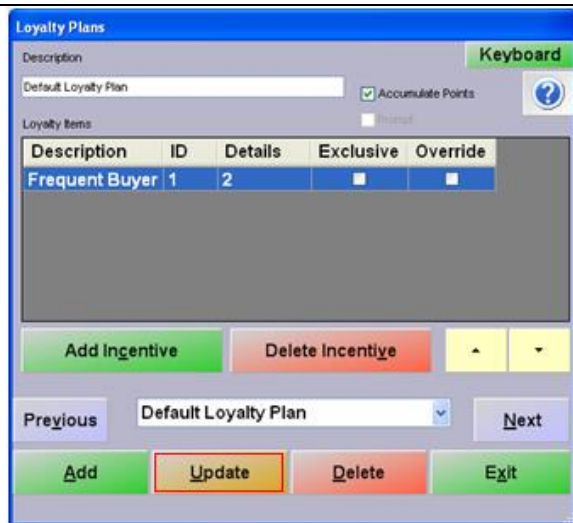|	
1. See steps 1 and 2 of the section of **Setting up a loyalty plan**.	
	2. Select **Add Incentive**.
	3. Select an incentive that you created earlier.
	4. Select **Update**.
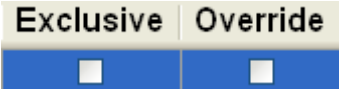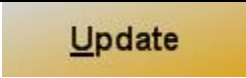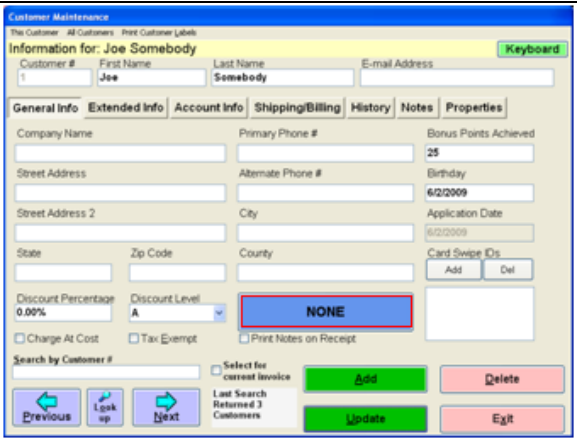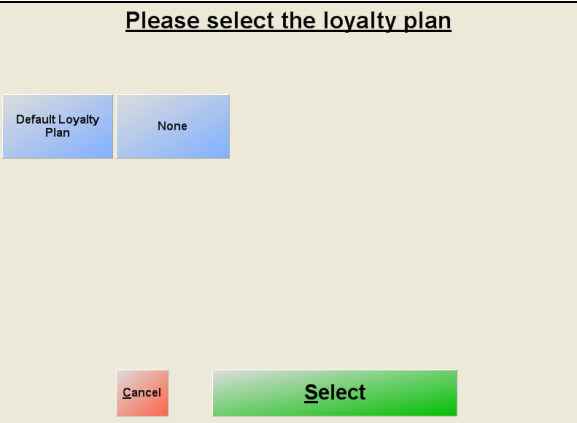
|	
☑ Prompt	5. Check **Prompt** so that when the customer is eligible for a reward, the cashier is notified instead of it automatically being added to the invoice.
Exclusive | Override ☐ | ☐	6. Check **Exclusive** if you would like the reward to be the only one offered to the customer when it becomes available, even if they are eligible for multiple awards. Check **Override** if you would like the reward to be offered despite another incentive being "Exclusive". 7. Repeat steps 2-6 to add more incentives to the loyalty plan.
▲ | ▼	8. 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.
Update	9. Select **Update** when finished.

Adding a customer to a loyalty plan

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

	1. Select **Customer Maintenance**.
	2. Select a customer. 3. Select the blue box containing the text **NONE**.
	4. Select a loyalty plan.
	5. Select **Update**.
	6. Select **Exit**.

Setting a default loyalty plan
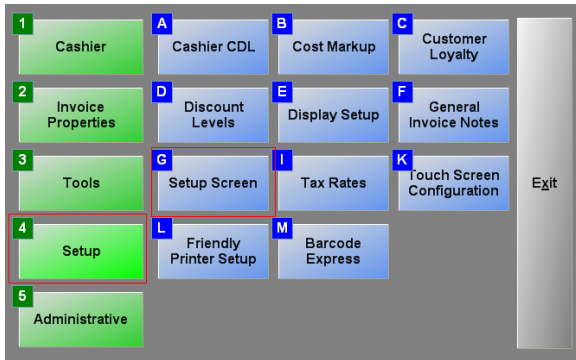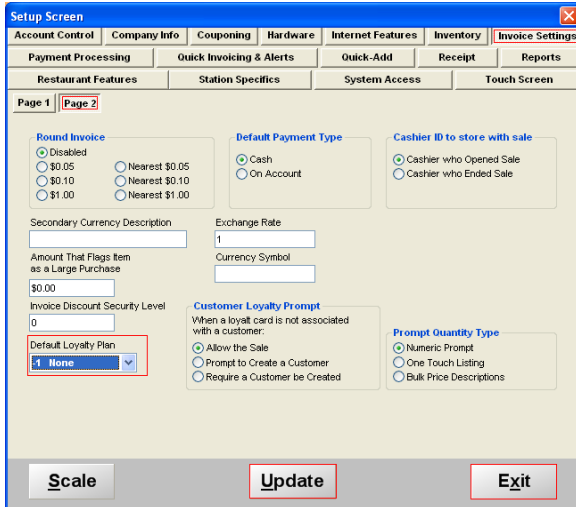
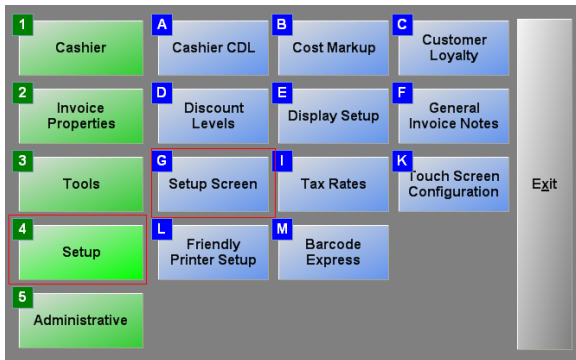|	
	1. After selecting **Manager**, select **Setup** and then **Setup Screen**.
	2. Select **Page 2** of **Invoice Settings**. 3. Change **Default Loyalty Plan** from **None** to the plan which you would like to be the default. 4. Select **Update**. 5. Select **Exit**.

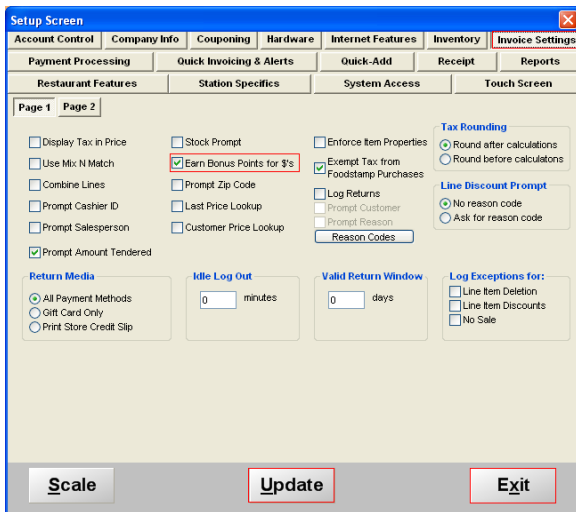**Assigning bonus points to individual items**

	1. After selecting **Manager**, select **Administrative** and then **Inventory Maintenance**.
	2. Select an item and modify its **Bonus Point** field. 3. Select **Save**.

Making it so that bonus points correspond to dollars spent at your store or restaurant
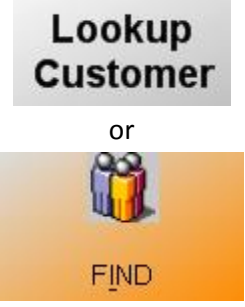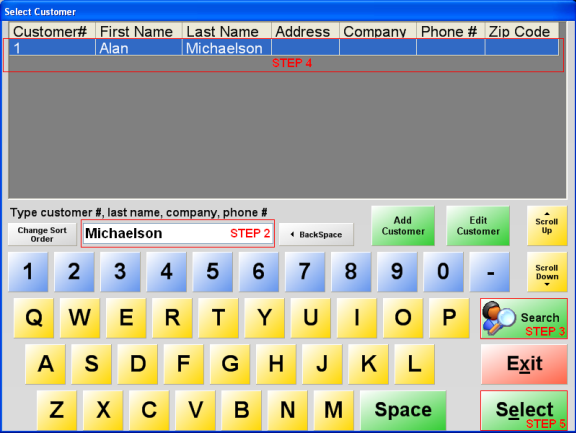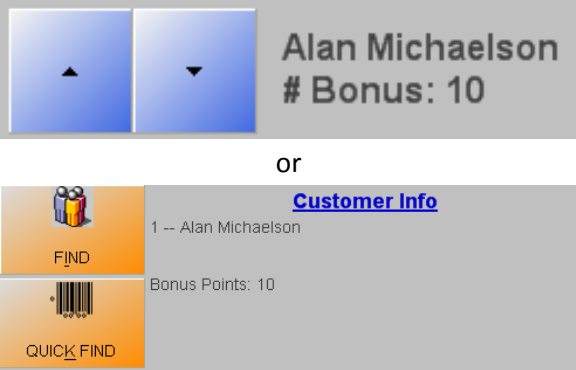
	1. After selecting **Manager**, select **Setup** and then **Setup Screen**.
	2. Select the **Invoice Settings** tab. 3. Check **Earn Bonus Points for $'s**. 4. Select **Update**. 5. Select **Exit**.

Selecting a customer for an invoice

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.

Lookup Customer or **FIND**	1. Select **Lookup Customer** in RPE or **FIND** in CRE.
	2. Enter search terms. 3. Select **Search**. 4. Highlight a customer on the list. 5. Select **Select**.
Alan Michaelson # Bonus: 10 or Customer Info 1 -- Alan Michaelson Bonus Points: 10	6. 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)
After items are added to the invoice and **PAY** is selected, bonus points may be accumulated and rewards may be offered.	