

Integrated Loyalty Guide

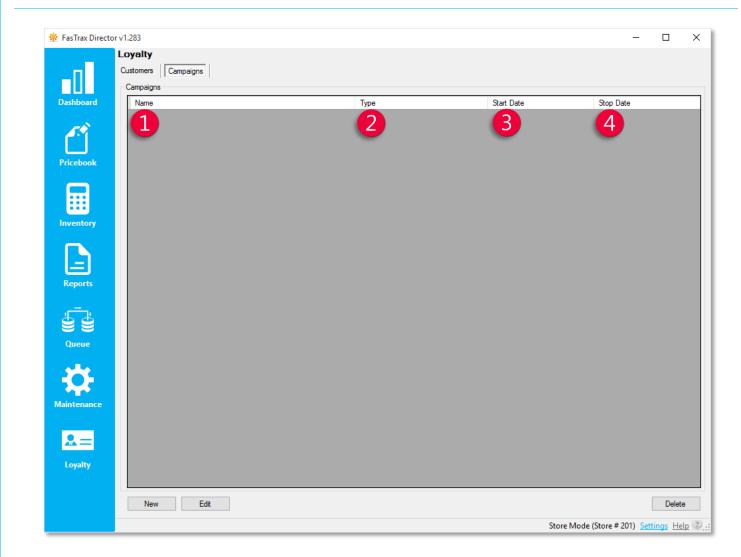
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Overview of Loyalty Campaigns

Loyalty Campaigns provide a method of rewarding customers for repeat business by giving discounts in the form of store coupons that can be redeemed on subsequent visits; the coupons can be printed for all customers or only for loyalty customers.

Once a customer is signed up for a **Loyalty Account**, Their sales are tracked, and coupons are printed after their purchases. These coupons can be set to be redeemed at the store that printed the coupon, or at every store, depending on relevant company policies.



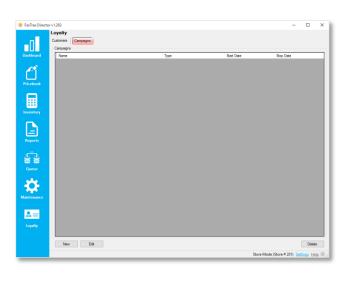
- 1 Name the name of the Loyalty Campaign
 - Type tells what the Campaign gives to the customer
 - o Currently, **Postsale Coupon** is the only type of campaign.
 - Start Date the beginning of the campaign
 - Stop Date the end of the campaign
 - Note that this is different from the **Expire Date** of the coupon and has no effect on coupons after they are printed.

Creating a Loyalty Campaign (Director)

1. In Director, choose the Loyalty module.







3. Choose the New button.

If you are editing an existing **Loyalty Campaign**, simply highlight the applicable line and choose the **Edit** button instead.

4. In the Campaign Details section, enter the parameters you wish for this discount to follow.

Campaign Types include:

Post sale coupon: Prints a coupon after the sale of qualifying items to provide a discount on the next visit.

PM/UST/RJR Points Rewards: When a loyalty customer has bought enough qualifying items, they get a discount on that transaction. Points are tracked for each type separately.

impaign Details		2)			
1						
Start D		-0	Campaign Type			`
Stop Date:	11/20/2015	- 2	Punchcard Trigger Type			
			Punchcard Trigger Value			
Header 1:				Coupon Value		
Header 2:					Only Valid At Print	ed Store
Header 3:					Single Use Per Ad	ccount
Text 1:					Coupon Expires	
Text 2:				Expire Date:	11/20/2015	
Text 3:						
Text 4:						
Text 5:						
Text 6:				6		
Text 7:						
Text 8:						
Items In Campa						
PLU/UPC	0	escription				



5. Choose Save when complete.

Save

Adding Items to a Loyalty Campaign

1. After logging into Director, choose the Pricebook module.



2. Choose Mass Updates from the menu ribbon.

hboard	Tree View Hierarchical View Filters	7474 Items In Filter	Description	Dept	Cost	Price	Margin	Vendor Part	Part Cost	CTN	Major Category	Category	Manufactu
Γ¶	ALT SMOKING	00000000001	test item	2004	\$1.000	\$20.00	95.00%	111	\$1.210	1			
	ALTERNATIVE SMOKING	00000000002	Cigar	100	\$0.010	\$1.00	99.00%	222	\$1.210	1	MISC	SHORTAGE FROM VEND	VARIOUS
ebook		0000000003	GAMBLER DISPLAY 16 OZ ASSOR	2005	\$1.000	\$3.00	66.67%			1	ROLL YOUR OWN	RYO TOBACCO	ARANGO
	DECIMAL ROUNDING	00000000004	OVERCHARGE FROM VENDOR	100	\$0.010	\$1.00	99.00%			1	MISC	OVERAGE FROM VENDOR	VARIOUS
		00000000005	Gift Certificate Sold	101	\$0.010	\$0.00	0.00%			0	GIFT CERTIFICATE		
	FREE PRODUCT DISCOUNT	0000000006	DAMAGED PRODUCT FROM VEN	100	\$0.010	\$1.00	99.00%			1	MISC	DAMAGED PRODUCT	VARIOUS
tory	FREIGHT CHARGE	0000000007	CUSTOMER DEPOSIT -nonrefunda	100	\$0.010	\$1.00	99.00%			1	MISC	DEPOSIT	CDO
	GIFT CERTIFICATE	0000000009	O-RING	2018	\$0.520	\$1.00	48.00%			0	ALTERNATIVE SMOKING	ALTERNATIVE SMOKING	ACE
	HAVARD INVENTORY VARIANCE	00000000010	SAS OIBD	105	\$0.010	\$0.00	0.00%			1	SAS OIBD	SAS OIBD	SAS
	HBA	00000000012	test kit	2018	\$0.100	\$1.00	90.00%			1			
rts	HOOKAH	00000000020	Lotto Scratch Redeem	2028	\$0.010	\$1.00	99.00%			1	LOTTERY SCRATCH	SCRATCH REDEEM	HOOSIER
	IMPORTED CIGARS	00000000030	1530 LOTTERY-ONLINE	2030	\$0.940	\$1.00	6.00%			0	LOTTERY ONLINE	ONLINE SALES	HOOSIER
.	IMPORTED ITEM	00000000035	1530 LOTTERY-ONLINE	2030	\$0.470	\$1.00	53.00%			0	LOTTERY ONLINE	ONLINE SALES	HOOSIER
Ě		00000000040	LOTTERY ONLINE REDEEM	2029	\$0.010	\$0.00	0.00%			1	LOTTERY ONLINE REDEEM	ONLINE REDEEM	HOOSIER
ie	DOTTERY ONLINE	00000000098	KEY DEPOSIT	100	\$0.010	\$0.00	0.00%			1	LOCKERS	KEY DEPOSIT	
ie ie	LOTTERY ONLINE REDEEM	00000000099	LOCKER RENTAL	100	\$0.010	\$0.00	0.00%			1	LOCKERS	LOCKER RENTAL	
	B-Mc LOYALTY	00000000100	DISCOUNT NO RETURNS	2022	\$1.850	\$2.50	26.00%			0	CIGARETTES	SUB-GENERIC CIGARETT	SAS
		00000000123	test	101	\$0.000	\$0.00	100.00%			1			
		00000000171	PIPE BAT SELF-CLEANING CIG LO	2018	\$3.500	\$7.99	56.20%			1	ALTERNATIVE SMOKING	ALT PIPE	GLOW
hance	Me New Item From Compare	00000000200	DISCOUNT NO RETURNS	2025	\$2.890	\$3.50	17.43%			0	CIGARETTES	BRANDED CIGARETTES	SAS
		000000003333	test	98	\$0.100	\$1.00	90.00%			1			
-	B-Mc POP	00000000599	HOOKAH MISC PIECES	2017	\$0.010	\$3.99	99.75%			0	HOOKAH	HOOKAH ACCESSORIES	EAST WES
	B-ME ROLL YOUR OWN	00000000643	PIPE BAT SELF-CLEANING BLACK	2018	\$1.980	\$3.99	50.38%			1	ALTERNATIVE SMOKING	ALT PIPE	GLOW
lty	SAS OIBD						F0 F00.			-			000 10
	B-Mc SNACKS	<											
	B-Mc SNUFF	Standard Prices C	Cost Updates Field Updates	Utilities	Addtl Utilities	Store Updati	ng Support U	tilities Zone Utilities	Price Zon	e Utilities - Co	ost Zone Utilities - Cigars Corr	npare Zones Avg Cost	
	SUPPLIES	Add To Buydow	m: blu	\sim	Add To Buydow	n							
					-								
		Add Vendor Parts T	o: 2 - Arango Cigar Co.	~	Add Vendor Part	s							
		Add To Discour	nt: SNUFF ROLL	~	Add To Discoun	t Value:	1						
	Pricebook Zone: 0 - Default												

- 3. Filter to the items you want to include in the Campaign
- 4. Add the Items to the campaign.
 - 1
 - Select the **Utilities** tab
 - Choose your campaign from the Add to Campaign dropdown
 - 3 Choose a Pts value for the items being added (Ex. 1 point for a pack of cigarettes, 10 pts for a carton).
 - 4 Click Add to Campaign to assign all items in the filter to the selected campaign.

Adding Loyalty Customers via the POS

- 1. After logging into POS, select Open POS
- 2. Within the POS, click the Customer gem.
- 3. This will bring up the Find Customer screen. To add a new customer from here, click New.
- 4. On the Customer Details screen, add any data needed for the customer. When finished, click Save.

Pro Tip: If you have a 2D barcode scanner, you can scan the customer's Driver's License to enter their info automatically.

new

first name:		last name:		
phone #:			⊠ ok t	to text
email:			⊠ ok t	to emai
address:				
city:				
state:		zip:		
DOB:	12/ 2/2015 -	license #:		
scannable ID:				
notes:				

For assistance with configurations, please contact Technical Support at Support@FasTraxPOS.com



