

Setting up the Loyalty Points

To setup the loyalty points system, there are few steps to take, the first is to create a Payment Type called Loyalty (you can name it anything else) and it should post to an expense account such as Discounts Given.

Note : A maximum of up to 9 Payment Types can be entered here

Payment Name	A/C to Post to on Sales	A/C to Post to on Purchase	Deposit	Default	Round	Open Till	
Cash	Bank Account	Bank Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Cheque	Bank Account	Bank Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Credit Card	Credit Cards	Credit Cards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
AMEX	Credit Cards	Credit Cards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
DINERS	Credit Cards	Credit Cards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
EFTPOS	Bank Account	Bank Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Loyalty	Discounts Given		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Rounding: Down
0.05

Save (F2) Close (Esc)

After saving the new payment type, now go to the Loyalty Tab and setup the Loyalty screen as desired, you have to assign how many points you wish to assign against the dollar amount, noting that the system will give the client one loyalty point for each dollar spent. So let's assume that we want to give the client \$50 for each \$1000 spent and also we want to have a time limit on the loyalty points of say 30 days, so if the client does not come back within 30 days and use his loyalty points, the points will expire, you can also prevent the loyalty points from expiring by entering a zero in the number of days to expire.

Note that the system will keep track of the loyalty points for the client and will automatically issue the loyalty points voucher when the number of points are reached or exceeded the allotted number of points (in this case 1000).

System Setup

Company General **Sales** Stock Purchase P.O.S Hardware Payments Loyalty

Points to Redeem: 1000

For the Amount of: 50.00

Days to Expiry: 30

Payment Name: Loyalty

Docket Header: **Acme Enterprises**
 12 Golf Avenue, Parkwood WA 6987
 Tel: (09) 84569874 Fax: (08) 94569857
 Store Credit

Docket Footer: Terms and conditions if use:
 1 - You can use credit voucher as cash
 2 - This voucher is transferable
 3 - No refund will be issued if lost

Save (F2) Close (Esc)

Points to Redeem: Enter the number of loyalty points the client needs to accumulate before he/she is issued with a loyalty points voucher.

For the Amount of: Enter the amount to be given against the allotted number of loyalty points. The example above shows that we are giving the client \$50 for every 1000 loyalty points which is \$1000 dollars spend. This represents a 5% discount we are giving the client and acts an incentive for the client to come back and buy from us to get that discount.

Days to Expiry: Enter the number of days to expiry from the date of issue. Entering zero will cause the points not to expire.

Payment Name: This is a drop down list that displays the payment types, you must choose the Loyalty payment type that we have created in step one, note that the loyalty payment option will be disabled in the POS screen for any client who does not have enough loyalty points to spend.



Docket Header and Footer: Enter the text you wish to display on the loyalty points header and footer.

You also have to make sure that you properly setup any client you wish to join to the loyalty points, by enabling the loyalty points flag in the client card as shown below.

Edit Client

Client Type	Client Code	Title	Business Name	Business No.
Business	ABS	Messers.	ABS Computers	

Trading Details		History	
Address	58 Maccalla Road	Delivery Address	58 Maccalla Green
			CANNING VALE
City	CANNING VALE		WA 61554
State	WA	http://	www.abscomputers.com
	61554	Email	james@abscomputers.com
Country	Australia	No Bulk Email	<input type="checkbox"/>
Telephone	0895563146	Notes	Good client who pays on time
Mobile	0412373722	Contact	James
Fax	0895563146	Pricing	Retail <input checked="" type="checkbox"/> Tax Inclusive
Salesman		Trading Term	30
Join Loyalty	<input checked="" type="checkbox"/>	Credit Limit £	1000
Total Points	6.530	Start Trading	27/06/2007
		Stop Trading	/ /

 Save (F2)	 Close (Esc)
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