Eagle Loyalty Quick Add and Subscriptions

When using Eagle Loyalty in your business, customers want to be enrolled as soon as possible to earn Rewards.

The most efficient way to do this is with the 'Quick Add' function in Point Of Sale.

Let's go through the required Setup, and Use of Eagle Loyalty Quick Add and take a look at the Subscription feature.

There are several Options and Security bits that will need to be reviewed prior to using Quick Add. Review the documentation provided in the Course Materials section of the Eagle Loyalty Overview course.

You will need to setup a Default Loyalty Customer to use as a template.

In Customer Maintenance, create a cash customer.

Enter LOYALTY DEFAULT in the 'Name' field and use DEFAULT for the 'Sort Name'.

Set the 'Credit Limit' to zero.

Best Practice suggests changing 'Print Invoices in POS' to 'No' and 'Charge Allowed' to "No".

Place a 'T' in the fourth code position.

Several Reports and Utilities will utilize this Code to identify Loyalty Customers.

The last step for setup must be done at All POS terminals that will be using Quick Add.

At each terminal, open Customer Maintenance from Eagle Browser.

Click 'Tools' and choose 'Options'.

In the 'Default Customer for Add Mode' enter the default customer you set up in MCR.

Select 'Yes' next to 'Calculate Next Customer Number'.

Type 1 in the 'Increment Customer Number by text box.

Click 'OK'.

When a customer decides to sign up for your Loyalty program, make sure your cursor is in the 'Customer' field.

Now press 'Menu' to open the Header Menu.

Choose Option 8, 'Add or Change a Customer'.

The 'Customer Add/Change' window displays.

Required fields of information are noted with an asterisk.

Blank out the Sort Name and it will be rebuilt based on your Options settings.

You can enter the Loyalty Number by manually typing it in.

On Eagle Software Release 26 and higher the system can also be configured to automatically generate a Loyalty ID number.

You can swipe a Gift Card with the cursor in the 'Loyalty Dollars ID' field   or manually enter the 16-digit number.

Eagle Software Release 26 and higher can generate the 'Loyalty Dollars ID' based on a preset bin range. See the documentation provided in the Course Materials for details.

Once the required information has been entered, simply press 'Add'.

If you are using Eagle Software Release 26 or higher,   you can enable the Option to utilize Loyalty Subscription Renewal.

Set to 'Yes', you can charge loyalty customers an annual fee for participation in your program.

When new loyalty customers are added, they will be assigned a 'Loyalty Subscription Expiration' date.

This date will default to one year from the date added.

In Point of Sale, if the customer's 'Loyalty Subscription Expiration' has been reached, the clerk will be asked if the customer wants to renew.

If they answer yes, the Loyalty Subscription SKU will be posted to the transaction when you press the Total key.

The Loyalty Expiration Date will also be updated to one year from the date of renewal.

If this prompt is answered 'No', the loyalty customer is still eligible for 'loyalty only' pricing and promotions and their purchases will still accumulate.

However, those purchases will not be converted to points until their subscription has been renewed.

If changes are needed to an Eagle Loyalty customer, they can be manually entered in Customer Maintenance.

Click the 'Loyalty Number' hotlink.

Update the 'Loyalty ID' or 'Loyalty Dollars ID' if needed.

Now press 'Change'.

The 'Loyalty Subscription Expiration' date can also be manually adjusted in MCR.

Open the Miscellaneous tab, update the information, and press Change.

With some simple setup you can utilize the Quick Add feature at Point of Sale for your new loyalty customers.

On Eagle Software Release 26 and higher you can set expiration dates and charge reward program related subscription fees.

By maintaining accurate data within MCR you will obtain valuable reporting critical to expanding your clientele   and your loyalty program.

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