Using Customer Loyalty Programs

Once you have established a customer loyalty program, the system automatically accumulates points as customers make purchases. This course will show you how these points are awarded from a promotion and from individual products. We will talk about redeeming the points for merchandise and see the effects credit notes have on them.

We'll begin with points earned from a promotion. A new Quick Sale order has been started for a customer. A product is selected and the quantity entered. A promotion is in place where each $1 spent accumulates 1 point. A MOLT is automatically added to the order showing the number of points earned.

Another product is added to the order. The points earned are recalculated based on the Total price of the line added. As you continue to add lines, they will be inserted before the MOLT.

Customers can be rewarded when they buy products that have been set up to earn points. To begin, let's view the Selling tab properties for the selected product. We see the points that will be earned for every $100 sold on Collect, Delivered or Direct sales. A Collect sale is the same as a Quick Sale.

This product is added to the order. The line is added to order and also automatically earns points from the loyalty program. No additional information is shown regarding points earned from the product. Complete the sale. When the order is finished, Complete it. The printed Invoice shows the number of promotion points earned on the sale.

The customer's account has been updated as well. To view the points rewarded, open the properties for the customer. Open the Sales tab. The Total points earned from both the promotion and product are displayed at the bottom of the window. This value will continue to update as the customer earns points from future sales.

Customers can choose to redeem points at the time they place an order. Here, a sales order has been started with a customer and products added. This order is earning loyalty points. You can check to see how many points the customer has earned and manually apply them.

Click on the Other Options button. Select Redeem Loyalty Points. A pop up window displays the total points and the maximum dollars available to redeem. The amount is calculated based on the system option 'Base currency to loyalty point exchange rate'.

In this example 1,000 points being the equivalent of $1. If the customer chooses to cash in some points now, enter the Dollar amount to redeem and then click OK. A MOLT is added to the order showing the value of the discount being applied and the Description indicates the number of points being redeemed. The Goods total has been reduced by the discount causing an adjustment to the points earned on this sale. The discount is displayed as a separate amount in the footer area of the order. You can now proceed and complete the order.

Alternatively, when the option to prompt for redeem points is set, the pop-up window automatically appears when you Complete a sales order. Once you have finished entering the order, click the Complete button. The pop-up window with point details is displayed. Enter the dollar amount to redeem.

It is possible to bypass redeeming an amount in favor of accumulating more points. You can see in the background that the MOLT with the discount has been applied. Proceed through the steps to complete the order.

When a credit note is entered against a sale that has earned loyalty points, the points are reversed. To begin, we look at the points earned for the selected customer. Now a credit note is started. Set the Reason and Handling on the General tab.

At the Lines tab, enter the invoice number that has the goods being returned. Select the line then click OK. Enter the Quantity being returned and then complete the Credit Note. The properties for the customer are opened and the

Sales tab selected. The Total points earned has been reduced for the amount of the products returned.

With a program in place, rewarding customers with loyalty points occurs automatically. You should now recognize the lines added to an order from a promotion and the effects of selling individual products set to earn points. You should also be able to redeem points and be aware of the impact entering a credit note has on points previously earned.

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