

# Setting Up and Using Loyalty Programs

Loyalty programs encourage customers to return to your store by offering them rewards, discounts, special prices, and coupons for future purchases. This can help increase profits, influence sales success, and enable long-term business growth.

In this course, we will show you how to configure and use loyalty programs.

## Objectives

- Adding a Loyalty Program
- Setting Up Benefits
- Configuring Membership
- Assigning a Loyalty Program

## Adding a Loyalty Program

To add a loyalty program, select **Customers** from the main menu then tap **Setup**. Tap **Loyalty**.

A list of existing loyalty programs appears.  
To add one, tap the **Add** button.

The **Setup New Program** page displays and has two tabs: **GENERAL** and **MEMBERSHIP FEES**.

The **GENERAL** tab consists of two sections.

Give your program a good *name* and enter a thorough *description* in the respective fields.  
Determine if your program will be single-level or multi-level from the drop-down menu.  
Multi-Level allows you to *set threshold values* and specify the benefits at *different levels* in the program.  
Enter the number of months after which the program expires.  
The program *never* expires if you leave this field blank.  
Enter the number of months in *this* box if you want your rewards to *purge* when they are not used for a certain amount of time.  
You *can* leave this field blank.

Switch on the **Membership Fees** toggle to collect membership fees for this program.  
This activates the **Membership Fees** tab.

Select *this* link to give each loyalty customer a unique ID when they are enrolled in this program.  
The ID can be used to lookup the customer's account in point of sale or could be scanned if printed in barcode format on a loyalty card.

Set the **Program ID** toggle to yes.

All the other fields are disabled until the toggle is on.

Switch on the **Auto-Assign ID** toggle to automatically assign a program ID.

Enter a number in the **Next Numeric Value to Assign** field.

Switch on *this* toggle to add a suffix to the program ID such as 'LC' to indicated it is a loyalty customer.

Now the next ID assigned will be 1001LC.

Tap **Ok** to return to the *General* tab.

Switch on *this* toggle and tap **Edit** to add a message to customer receipts after they join the program.

Enter the text in the **Join Message** pop-up and tap **Ok**.

This toggle determines if the loyalty summary prints on sale receipts.

## Setting Up Benefits

The next step is to set up *benefits* for your loyalty program.

These determine how you want the rewards to be calculated.

If you choose *Points Per Dollar*, enter the number of points the customer earns for every dollar spent.

You can also give a few points to customers when they sign up for this program.

Enter the number of points required by the customer to collect the reward.

Determine the dollars that get issued as a reward.

For example, for every 100 points they earn, they will get \$5 off on their next purchase.

If the reward is assigned by *Percentage of Sales*, identify the percentage a customer will earn from their sales transactions.

*Sales Conversion to Reward* is the dollar amount that triggers the reward to be issued.

Enter the terms and conditions of the program in the **Terms Description** tab.

For example, reserving the right to change your loyalty program as needed.

In the **Benefits Description** tab, give a detailed outline of the program.

For example, for every 100 points a customer earns, they get \$5 off on their next purchase.

Finally, click **Save**.

## Configuring Membership

The **Membership Fees** tab will only be available if you've *switched on* the Membership Fees toggle.

Select the Membership Fees tab and choose the frequency of the fee.

For a one-time fee, select the **Non-recurring** option from the drop-down menu.

If the billing frequency is *Monthly*, choose the appropriate billing day from the drop-down menu.  
Enter the number of months or years after which the membership will end.  
Select the *billing store* and the *billing user* responsible for billing customers from the drop-down menus.

If the membership fee is prorated based on when someone signs up, determine how that amount is calculated.  
Choose an option from the drop-down menu.

Edit the level details of your loyalty program in the *Membership Fees* sub-section.

Check *this* box if you want to add a one-time fee to this level.  
You will need to identify a fee type product so that the correct amount is charged to the customer.  
If you have one already set up, you can search by its name or description.  
You can add a *new* membership fee item by clicking the link from the drop-down menu.

To add a billing fee to a *level*, check *this* box and select a fee type product equal to the billing fee amount in the **Billing Fee Item** column.

To make a level available for multiple members, check the *Multi Member* box and enter the number of members allowed in the **Members Allowed** column.

Once you've entered all the required information, tap **Save**.

## Assigning a Loyalty Program

Now that we have added a loyalty program, let's assign it to the appropriate customers.

Based on membership fee requirements, you can assign or use a loyalty program in two ways.

A loyalty program that does *not* need any membership fee can be assigned to a customer *when you add a new one or when you edit* their contact details.

Go to **Customers > Customers**.

Select the *customer* you want to assign to the loyalty program and tap **Edit**.

Click the **Loyalty** tab, and tap **Add**.

In the **Add Loyalty** pop-up, choose a loyalty program from the drop-down menu and tap **Ok**.

Your customer is now enrolled in this program and can benefit from it every time they shop.

A loyalty program that requires a membership fee can be *sold* at POS.

From the main menu, tap **Sales > POS**.

Use the search bar to bring up the customer's account.

Select the **Customers** tab.

Scroll down to view the list of loyalty programs.

*Already A Member* indicates that the customer is a member of the specific loyalty program.

Tap **Become A Member** to enroll the customer in a new loyalty program.

Enter any missing customer information and tap **Save**.

Complete the transaction as you normally would.

You can view the rewards and points total on the invoice or receipt.

## Recap

Loyalty programs are a great way to keep customers coming back to your store. For more information, refer to the related help articles, videos, and guided learning flows.

In this course, we showed you how to set up and use a loyalty program. We also showed you how to define the plan benefits and configure memberships and fees.

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