



Portal User Guide

Loyalty

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Managing loyalty

The Portal supports a wide range of features to collect customer information, keep in touch with and market to customers and reward customers for shopping at your sites.

Loyalty Programs

Loyalty programs allow you to reward customers for continuing to shop for you with incentives such as:

- Discounts.
- Exclusive memberships.
- Loyalty points to be accrued and redeemed.
- Randomised rewards such as jackpots and prizes.
- Special loyalty-only purchase prices and promotions.
- Special loyalty-only prices.

The Portal can manage multiple loyalty programs simultaneously. This means if your company participates in a multi-company loyalty program, such as a frequent flier rewards program or corporate rewards scheme, you can manage such schemes alongside other loyalty programs that are just within your company, like a membership discount or frequent shopper rewards.

Multi-company loyalty programs

A multi-company loyalty program is controlled by an entity outside your company. There are various configurations that allow loyalty points to be:

- Accrued outside your company and redeemed within your company.
For example, a customer purchasing goods from your store with a credit card company's reward points.
- Accrued within your company to be redeemed only with the external company.
For example, a customer earning frequent flier points by purchasing at your grocery store.
- Accrued and redeemed both within your company and outside it.

You may participate in more than one multi-company rewards program: the loyalty points between programs are not shared, and each customer maintains a separate loyalty points balance for each multi-company loyalty program. The Portal correctly determines where loyalty points should be allocated according to which loyalty program a loyalty card belongs to. If your company participates in one or more multi-company loyalty programs, please contact AMC Convergent IT to configure your Portal for multi-company loyalty.

Company loyalty programs

Company loyalty programs work only within your company. They can be restricted to a specific site, or points and benefits can be shared across all sites. You can run several company loyalty programs together, offering different benefits and even upgrade paths and tiered memberships, but each customer can only have one loyalty points balance:

- Per site, when loyalty points can only be redeemed at the site they were accrued at.
- Per company, when loyalty points are shared across all sites.

This internal loyalty points balance does not affect your participation in any multi-company loyalty programs: you can run company loyalty programs alongside multi-company programs. To manage a loyalty program just within your company or site, create loyalty card types that accrue points and receive awards.

See *Managing loyalty departments* on page 35.

Loyalty Members and Loyalty Points

Loyalty members are a type of customer within the Portal. A loyalty member may also be a customer or a debtor, but their loyalty account is what allows them to accrue loyalty points or receive rewards. Loyalty members may have multiple loyalty accounts and belong to both your company loyalty program and a multi-company loyalty program, but a specific loyalty account can only belong to a single loyalty program. You can also import loyalty membership information.

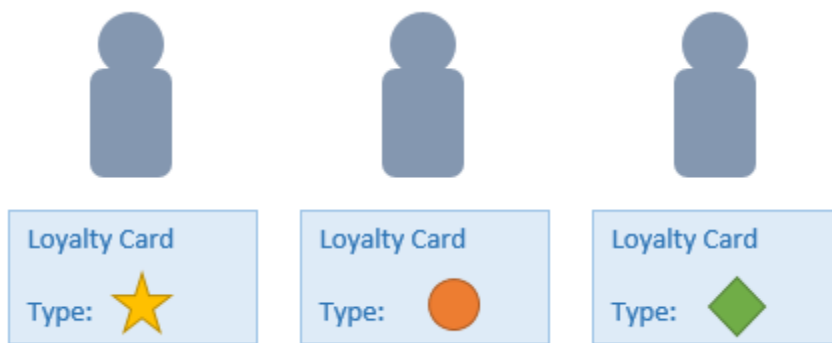
See *Managing loyalty members* on page 49.

Loyalty members accrue loyalty points from transactions and loyalty rewards, which can be redeemed for vouchers, membership renewal, or redeemed when purchasing goods or services. You can control the number of loyalty points awarded by specific items, departments, time of purchase, or loyalty membership type, including adding bonus loyalty points or loyalty multipliers for specific circumstances.

Loyalty Card Types, Groups and Filters

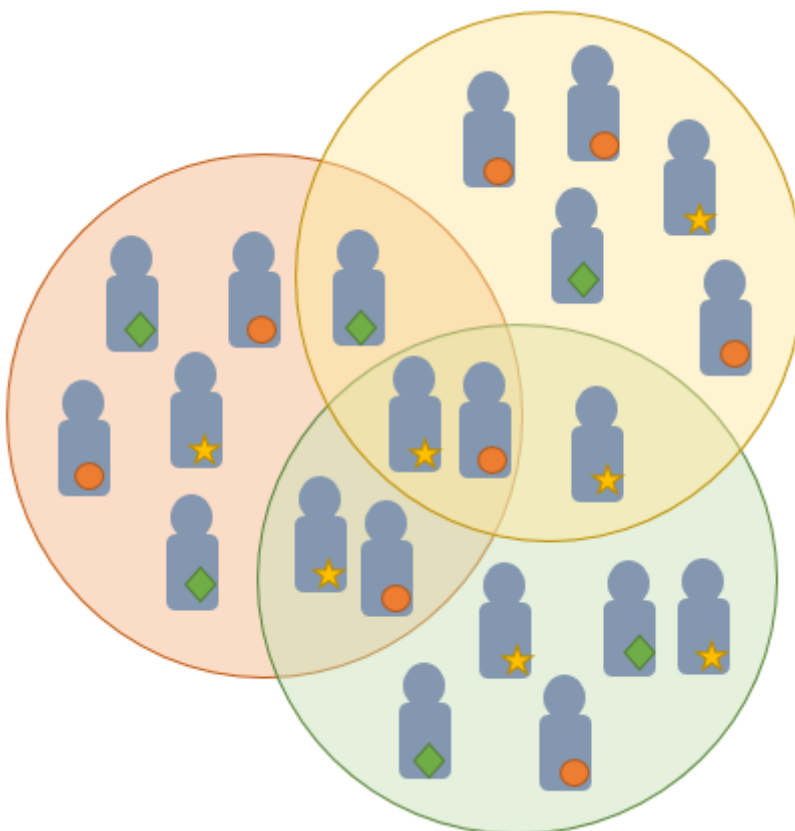
Memberships may give access to your services, grant discounts, accrue loyalty points, or reward loyalty members with prizes and jackpots, depending on the card type of the membership. The card type defines how the membership behaves within your company. A membership can only have one card type, but you can configure the card type to change automatically by set circumstances, such as time lapsed since joining, total expenditure, or a specific item purchase, such as a purchased membership upgrade. Card types can also specify a downgrade to a different card if circumstances aren't met.

See *Managing card types* on page 128.



Loyalty groups are used to collect and categorise memberships by different criteria, to make rewards, mail outs or other activities available to specific loyalty members. Loyalty groups are independent of card types: that is, two loyalty members with the same card type may belong to different groups, and loyalty members with different card types can belong to the same group. Loyalty members are added individually to groups, and can belong to multiple groups at once.

See *Managing loyalty groups* on page 178.



Filters are used to select specific loyalty members according to information, such as their postcode, birthday, first name, card type, group membership or other information. These loyalty members can then be reported on, or mailed out to using the mail out features.

See *Managing filters and reports* on page 425.

Redeeming Loyalty Points

Loyalty points can be redeemed when paying for transactions, or also to purchase services such as continued loyalty membership. The rate of redemption is controlled by the membership card type. Loyalty points can be redeemed directly through the Point of Sale, or converted into vouchers to be spent.

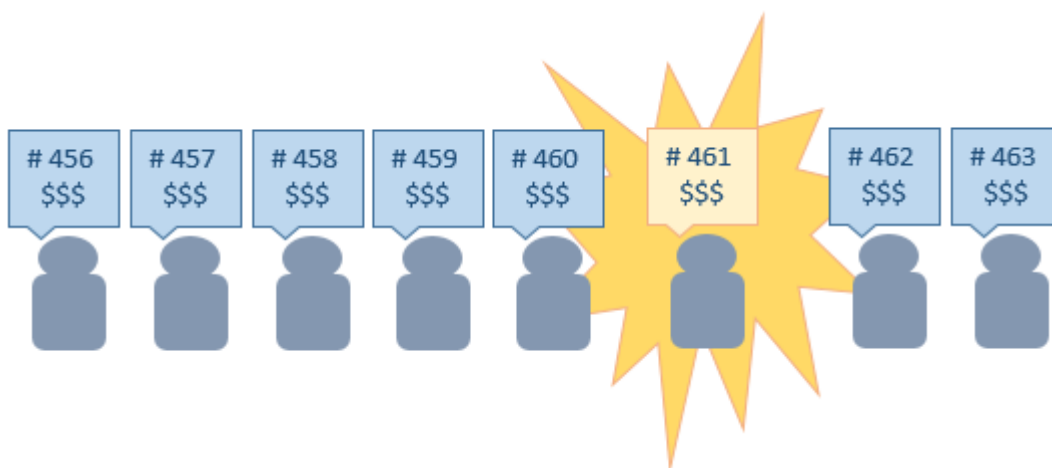
See *Maintaining loyalty vouchers* on page 298.

Loyalty Rewards and Prizes

The Portal provides a range of loyalty membership rewards, including regular discounts or loyalty points redemption, and randomised prizes and jackpots awarded to loyalty members.

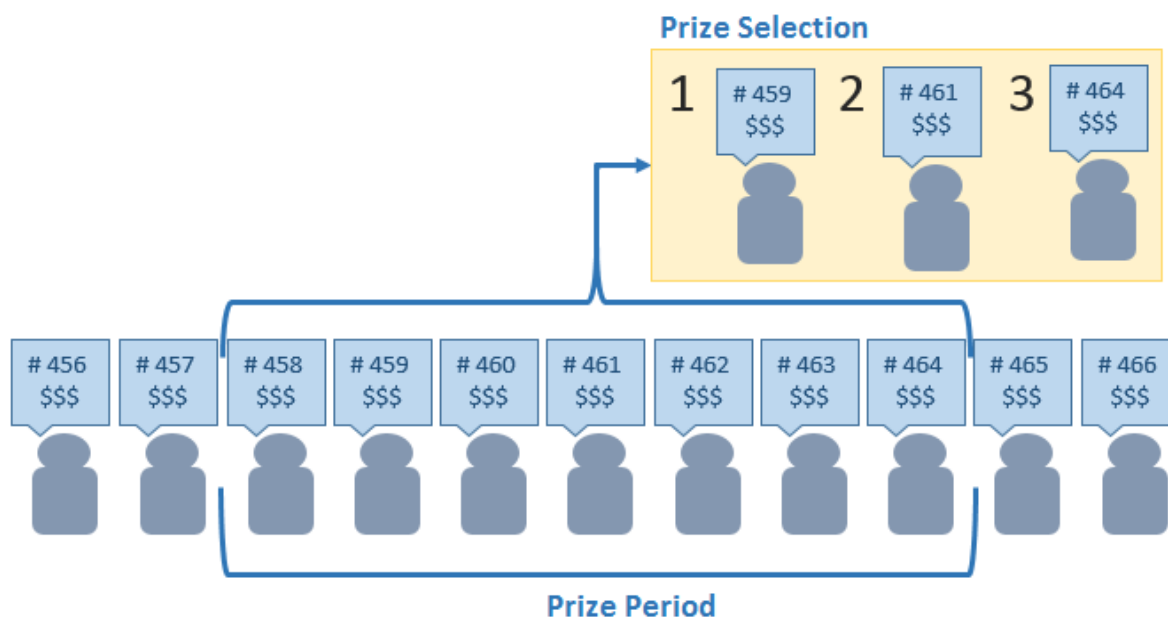
Jackpots

A jackpot is a pool of loyalty points that is awarded to the transaction that occurs on a randomly selected transaction number. Depending on your configuration, each eligible transaction prior to the jackpot award may add a percentage or number of loyalty points to the jackpot pool, either paid additionally from the venue that processed the transaction, or subtracted from the loyalty points that were accrued by the loyalty member during that transaction. Jackpots can be restricted to particular loyalty card types or groups.



Prizes

Loyalty prizes are similar to jackpots in that they award loyalty points to a random transaction. However, instead of awarding the points to the transaction that happens to be the designated transaction number, the Portal collects all transactions that occurred within the prize period and randomly selects the prizes among them. For example, a daily prize that awards three prizes would randomly select three transactions that had occurred over the past day to receive the prize.



Offers

Offers allow similar rewards to promotions, discounts and frequent shopper items, but they allow you to limit the reward to a specific number of customers. You can set a total limit of the number of offers that can be redeemed both across your company, and per site. Offers can also be restricted to specific items, loyalty groups, card types, times of day and sites. See *Managing Offers* on page 260.

Discounts, Promotions and Frequent Shopper Items

You can configure your company's discounts or promotions to be available only to loyalty members. Look for the **Loyalty Only** flag on the relevant maintenance screens.

You can also configure specific items or groups of items that grant loyalty members additional loyalty points on purchase, or are only available for purchase by specific loyalty card types. You can set minimum and maximum purchase amounts for rewards, and specify specific dates and times that rewards are available. For example, offering a product cheaply every Tuesday afternoon, offering a discount if a loyalty member purchases two or more, or offering an exclusive membership level only loyalty members can purchase.

See *Managing frequent shopper items* on page 320.

Loyalty Events and Mail Outs

You can contact your loyalty members easily via mail outs, email mail outs and SMS mail outs. You can use this to keep in touch with your customers, send customer feedback surveys, or send marketing materials and let them know about promotions.

See *Managing mail outs* on page 359.

Loyalty reports

Managing loyalty

You can sue the following reports to view statistics and information on your loyalty program.

See:

- *Loyalty Events History report* on page 469.
- *Loyalty Events report* on page 464.
- *Online Loyalty Promotion Message Maintenance screen* on page 257.
- *Card Sales report* on page 474.
- *Foreign Loyalty Movement report* on page 479.
- *Frequent Shopper Cards report* on page 482.
- *Frequent Shopper Member report* on page 488.
- *Lost Cards report* on page 493.
- *Loyalty Customers report* on page 497.
- *Loyalty Department report* on page 501.
- *Loyalty Discounts report* on page 506.
- *Loyalty Family Cards report* on page 511.
- *Loyalty Site Movement report* on page 514.
- *Loyalty Movement report* on page 518.
- *Loyalty Customer Purchases by Site report* on page 523.
- *New Loyalty Cards report* on page 529.
- *Pending Expired Points report* on page 532.
- *Pending Lost Cards report* on page 536.
- *Process Renew Cards report* on page 539.
- *Points Ageing report* on page 543.
- *Points Expired By Site report* on page 547.
- *Redemption report* on page 550.
- *Top 10 Loyalty Member report* on page 553.
- *Top 10 Loyalty Members - Details report* on page 558.
- *Loyalty Transaction Extraction report* on page 565.
- *Transactions per Hour report* on page 569.
- *Warning Loyalty Sales report* on page 574.

Configuring loyalty

You can configure how loyalty works both within your company, and for individual sites.
See:

- *Configuring your company for loyalty* on page 14
- *Configuring your company for loyalty information* on page 21.
- *Configuring your company for loyalty emails* on page 25.
- *Configuring your company for loyalty events* on page 29.
- *Configuring your site for loyalty* on page 32.

Configuring your company for loyalty

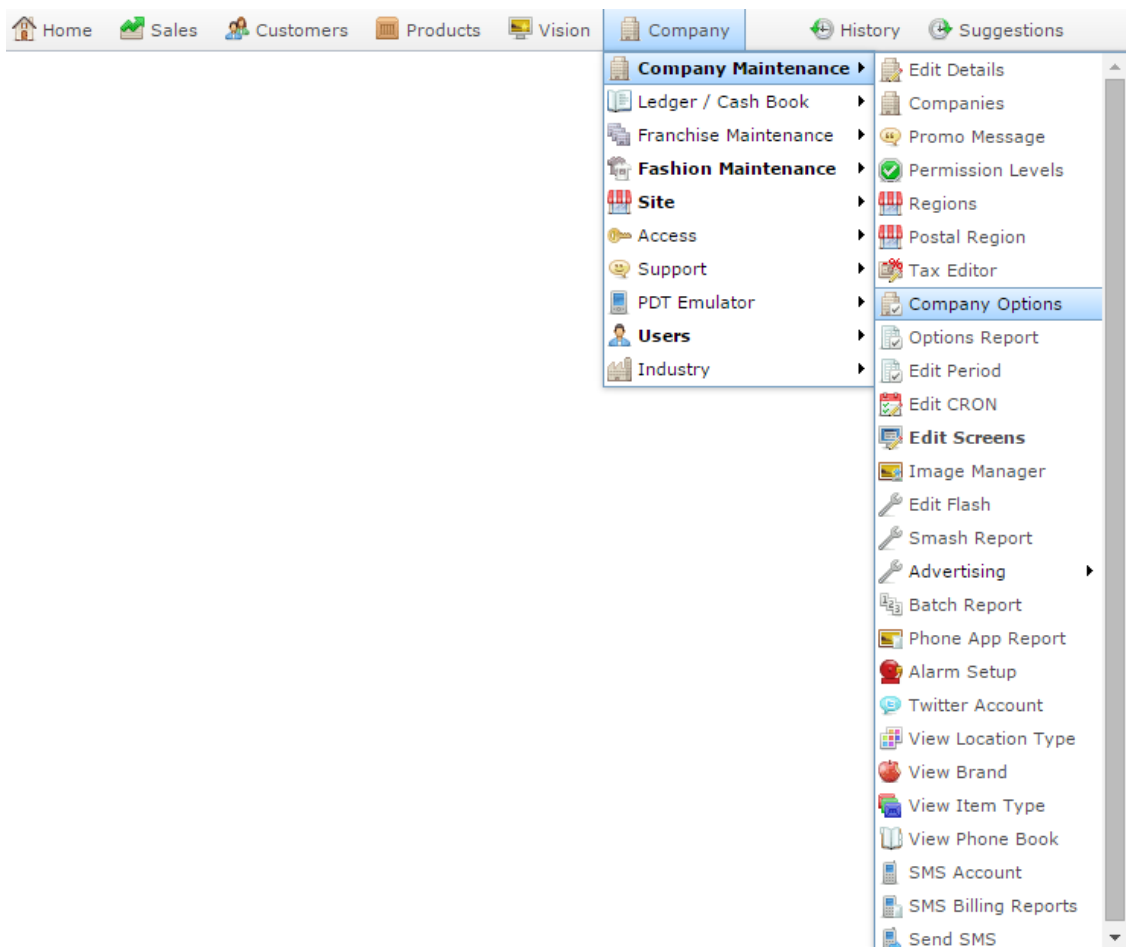
Use the Company Options - Loyalty section to configure your company for customer loyalty reward systems.

Note: There are several sections for configuring loyalty within your company. Also see: *Configuring your company for loyalty information* on page 21, *Configuring your company for loyalty emails* on page 25, and *Configuring your company for loyalty events* on page 29.

Opening the Company Options - Loyalty section

To open the Company Options - Loyalty section:

1. Press  **Company**.
2. Press **Company Maintenance > Company Options**.



The Artist section of the Company Options screen is displayed.

3. Open the **Section** drop-down list.

Options Maintenance

Company:

Configuration

Group:

Section:

Name	Value	Description
Artist Label	Artist	Set to to match company requirements
CD Label Label	CD Label	Set to to match company requirements
Catalog Label	Catalog	Set to to match company requirements
Release Date Label	Release Date	Set to to match company requirements
Title Label	Title	Set to to match company requirements

4. Press **Loyalty** from the **Section** drop-down list.

The Loyalty section is displayed.

Options Maintenance

Company:

Configuration

Group:

Section:

Name	Value	Description
Add Email Self Login	True	Set to Add Email as an option for user self login
Allow SMS on Password Recovery	False	Set to enable the pin recovery to be sent via SMS
Capture Extra Counts	:	Set Required label
Capture Favourite	:	Set Required label
Capture Income	:	Set Required label
Capture Label1	:	Set Required label
Capture Label10	:	Set Required label
Capture Label2	:	Set Required label
Capture Label3	:	Set Required label
Capture Label4	:	Set Required label
Capture Label5	:	Set Required label
Capture Label6	:	Set Required label

Company Options - Loyalty section key fields and buttons

Field	Description
Add Email Self Login	<p>Type true to permit loyalty customers to sign in using their email address.</p> <p>The Portal attempts to verify loyalty logins using:</p> <ol style="list-style-type: none"> 1. Email, if enabled using this configuration setting. 2. Mobile number, if the loyalty member has recorded a mobile number. 3. Card number.
Allow SMS on Password Recovery	<p>Type true to allow card PINs to be sent to loyalty members via SMS.</p>
Capture Extra Counts	<p>Type the label displayed when capturing this option.</p> <div data-bbox="895 1294 1391 1498" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 10px; margin-top: 10px;"> <p>Note: If you are using the user-defined loyalty member maintenance screen, this configuration setting is ignored.</p> </div>
Capture Favourite	<p>Type the label displayed when displaying the 'Favourite' option on the loyalty log in.</p> <div data-bbox="895 1697 1391 1861" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 10px; margin-top: 10px;"> <p>Note: If you are using the user-defined card login screen, this configuration setting is ignored.</p> </div>

Field	Description
Capture Income	Type the label displayed when requesting the customer's income level.
Capture Labels A / B	Type the label displayed when requesting custom information your company wants to record about loyalty customers. Note: These fields correspond to the Cap1, Cap2 fields in the Name tab of Loyalty Maintenance.
Capture Labels 1-9	Type the label displayed when requesting custom information your company wants to record about loyalty customers. Note: These fields correspond to the Soft Label 1-10 fields in the Name tab of Loyalty Maintenance.
Capture Occupation	Type the label displayed when requesting the customer's occupation. Note: This field is displayed on the Card tab of Loyalty Maintenance, and can be used to capture other information if required.

Field	Description
Cardtype Alter	Type true to allow an external web site to alter the card type of the loyalty customer using the Portal's web API.
Minimum Sales	Type the minimum amount a customer must spend in order to be able to redeem loyalty points.
Minimum Time	Type the minimum number of days a customer must be a loyalty member before they can redeem loyalty points.
Pin Case Sensitive	<p>Type true to make the PIN case sensitive.</p> <p>If a PIN is case sensitive, then the customer must use the exact upper and lower case letters of the PIN. For example, apple and APPLE would be two different PINS.</p>

Field	Description
SMS Password Recovery	<p>Type the SMS message used for password recovery SMS messages.</p> <p>Placeholders to personalise the message with the loyalty member's details are:</p> <p><<FIRST>> Loyalty member's first name.</p> <hr/> <p><<LAST>> Loyalty member's surname.</p> <hr/> <p><<MOBILE>> Loyalty member's mobile number.</p> <hr/> <p><<PIN>> Loyalty member's PIN.</p>
Show Transactions	Type true to show the customer's transactions when they log in.
Support Email	Type the email address for loyalty customer support.
Use Card as PIN on blank password	Type true to allow customers to use their card number as their PIN when logging in with their card.
Use Email as PIN on blank password	Type true to allow customers to use their loyalty email address as their PIN when logging in with their card.

Field	Description
Use Mobile as PIN on blank password	Type true to allow customers to use their mobile phone number as their PIN when logging in with their card.

Configuring your company for loyalty information

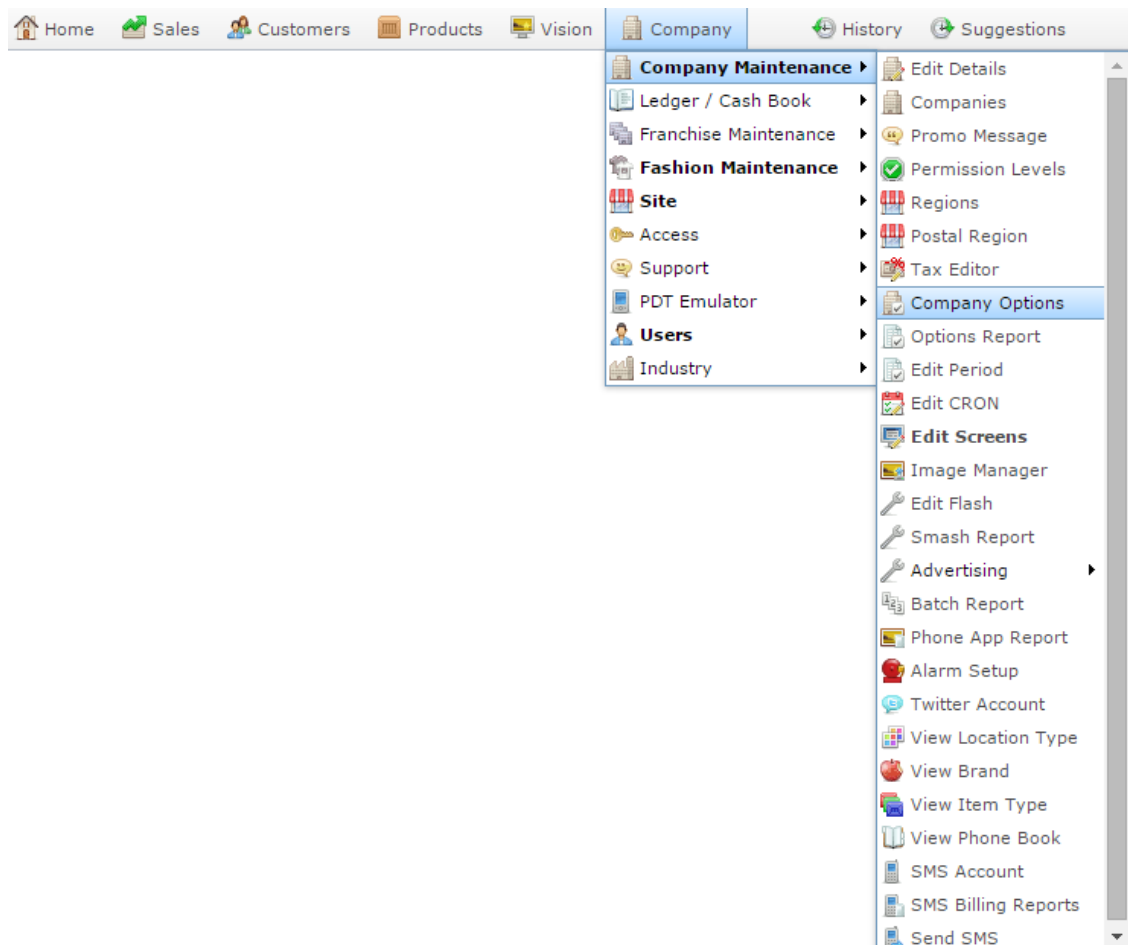
Use the Company Options - Loyalty Compulsory section to configure what information the Portal configures compulsory for loyalty customers.

Note: There are several sections for configuring loyalty within your company. Also see: *Configuring your company for loyalty* on page 14, *Configuring your company for loyalty emails* on page 25, and *Configuring your company for loyalty events* on page 29.

Opening the Company Options - Loyalty Compulsory section

To open the Company Options - Loyalty Compulsory section:

1. Press  **Company**.
2. Press **Company Maintenance > Company Options**.



The Artist section of the Company Options screen is displayed.

3. Open the **Section** drop-down list.

Options Maintenance

Company: Example Company

Configuration

Group: Portal

Section: Artist

Name	Value	Description
Artist Label	Artist	Set to to match company requirements
CD Label Label	CD Label	Set to to match company requirements
Catalog Label	Catalog	Set to to match company requirements
Release Date Label	Release Date	Set to to match company requirements
Title Label	Title	Set to to match company requirements

Update Delete

4. Press **Loyalty Compulsory** from the **Section** drop-down list.

The Loyalty Compulsory section is displayed.

Options Maintenance

Company: AMC Master

Configuration

Group: Portal

Section: Loyalty Compulsory

Name	Value	Description
Address	False	Set if Compulsory
Check On Enquiry	True	Set if Compulsory flags are to be checked on Terminal Enquiry
DateOfBirth	False	Set if Compulsory
Either	False	Set if either Email or Mobile Compulsory
Email	False	Set if Compulsory
First Name	True	Set if Compulsory
Gender	False	Set if Compulsory
Home Phone	False	Set if Compulsory
Ignore	False	Set to allow Portal edit to ignore Compulsory flags
Last Name	True	Set if Compulsory
Mobile Phone	False	Set if Compulsory
Occupation	False	Set if Compulsory
Postcode	False	Set if Compulsory
Suburb	False	Set if Compulsory
Work Phone	False	Set if Compulsory

Update Delete

Company Options - Loyalty Compulsory section key fields and buttons

Field	Description
Address	Type True if the loyalty member's address must be completed.
Check on Enquiry	Type True if the Portal should check that compulsory fields are complete when the customer's details are checked at a terminal.
Date of Birth	Type True if the loyalty member's date of birth must be completed.
Either	Type True if either the loyalty member's email or mobile number must be completed.
First Name	Type True if the loyalty member's first name must be completed.
Gender	Type True if the loyalty member's gender must be completed.
Home Phone	Type True if the loyalty member's home phone number must be completed.

Field	Description
Ignore	Type True if Portal operators can ignore compulsory fields when they edit loyalty records through the Portal, for example edit a loyalty member and delete an incorrect address, even though the address field is compulsory.
Last Name	Type True if the loyalty member's last name must be completed.
Mobile Phone	Type True if the loyalty member's mobile phone number must be completed.
Occupation	Type True if the loyalty member's occupation must be completed.
Postcode	Type True if the loyalty member's post code must be completed.
Suburb	Type True if the loyalty member's suburb must be completed.
Work Phone	Type True if the loyalty member's work phone number must be completed.

Configuring your company for loyalty emails

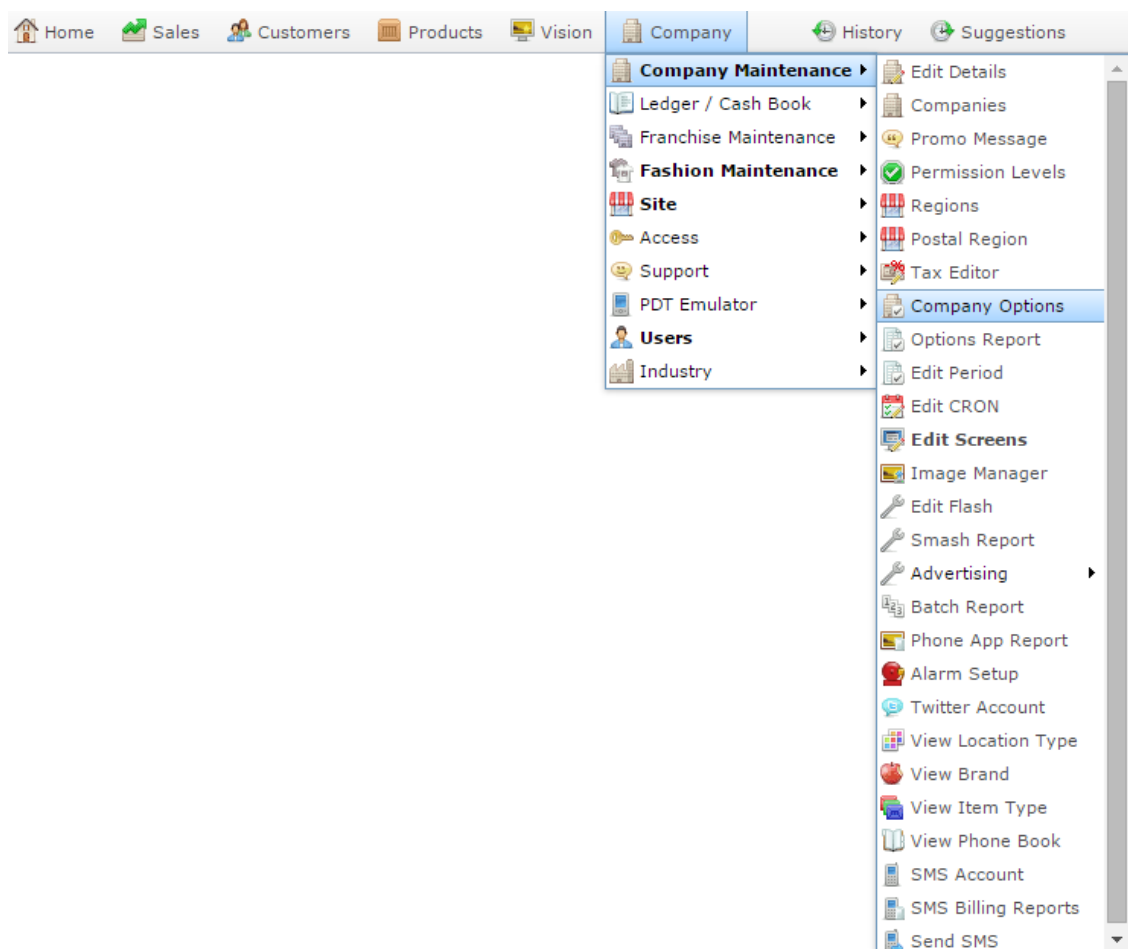
Use the Company Options - Loyalty Email section to configure your company for customer loyalty emails.

Note: There are several sections for configuring loyalty within your company. Also see: *Configuring your company for loyalty information* on page 21, *Configuring your company for loyalty* on page 14, and *Configuring your company for loyalty events* on page 29.

Opening the Company Options - Loyalty Email section

To open the Company Options - Loyalty Email section:

1. Press  **Company**.
2. Press **Company Maintenance > Company Options**.



The Artist section of the Company Options screen is displayed.

3. Open the **Section** drop-down list.

Options Maintenance

Company:

Configuration

Group:

Section:

Name	Value	Description
Artist Label	Artist	Set to to match company requirements
CD Label Label	CD Label	Set to to match company requirements
Catalog Label	Catalog	Set to to match company requirements
Release Date Label	Release Date	Set to to match company requirements
Title Label	Title	Set to to match company requirements

4. Press **Loyalty Email** from the **Section** drop-down list.

The Loyalty Email section is displayed.

Options Maintenance

Company:

Configuration

Group:

Section:

Name	Value	Description
Confirm	Click Here to Confirm Email	Set message for email confirmation
ConfirmReading		Set URL for Confirmed Reading, leave blank for portal default
Enable SpamAssassin	True	Set to True to enable Spam Assassin evaluation of email
Forward Default Message	I've just received this email and thought you might find it interesting	Set Default message when forwarding on to a friend
Forward Message	Click here to Forward to a Friend	Set Set message for forwarding on to a friend
From		Set to 'From' where customer sees email is from
Login	Click to Login to update your card details	Set Default message for Login action
Lost	Click here for password recovery	Set message for password recovery
Lost URL		Set URL for lost password recovery, leave blank for portal default
Opt In	Click Here to Confirm Opt In for emails	Set message for email opt in confirmation
Opt Out	Click here to opt out	Set message for Opt Out
Opt Out URL		Set URL for Opt Out, set blank for portal default
Reply Address		Set to address where Client replies to. Leave

Company Options - Loyalty Email section key fields and buttons

Field	Description
Confirm	Type the message to be displayed for confirmation links in emails.
ConfirmReading	Type the URL the confirmation link leads to, or leave blank to use the Portal default.
Enable SpamAssassin	Type True to enable SpamAssassin email evaluation to ensure your email won't be automatically marked as spam.
Forward Default Message	Type the message to be displayed by default when marketing messages are forwarded.
Forward Message	Type the link to display that helps customers forward the email to a friend.
From	Type the name the email appears to be from.
Login	Type the message to display for login links.
Lost	Type the message to be displayed for recovering passwords.

Field	Description
Lost URL	Type the URL link for customers to recover their login password. Leave blank to use the Portal default.
Opt In	Type the message to display for opt-in links.
Opt Out	Type the message to display for opt-out links.
Out Out URL	Type the URL for customers to opt-out of further emails, or leave blank to use the Portal default.
Reply Address	Type the email address to send customer's replies to loyalty emails to.
Return Address	Type the email address to sent email server messages to, for example regarding emails that failed to send.
Text	Type the message to be displayed when the email is opened in a text-only viewer.
View	Type the message to be displayed for the link to view the email online.

Configuring your company for loyalty events

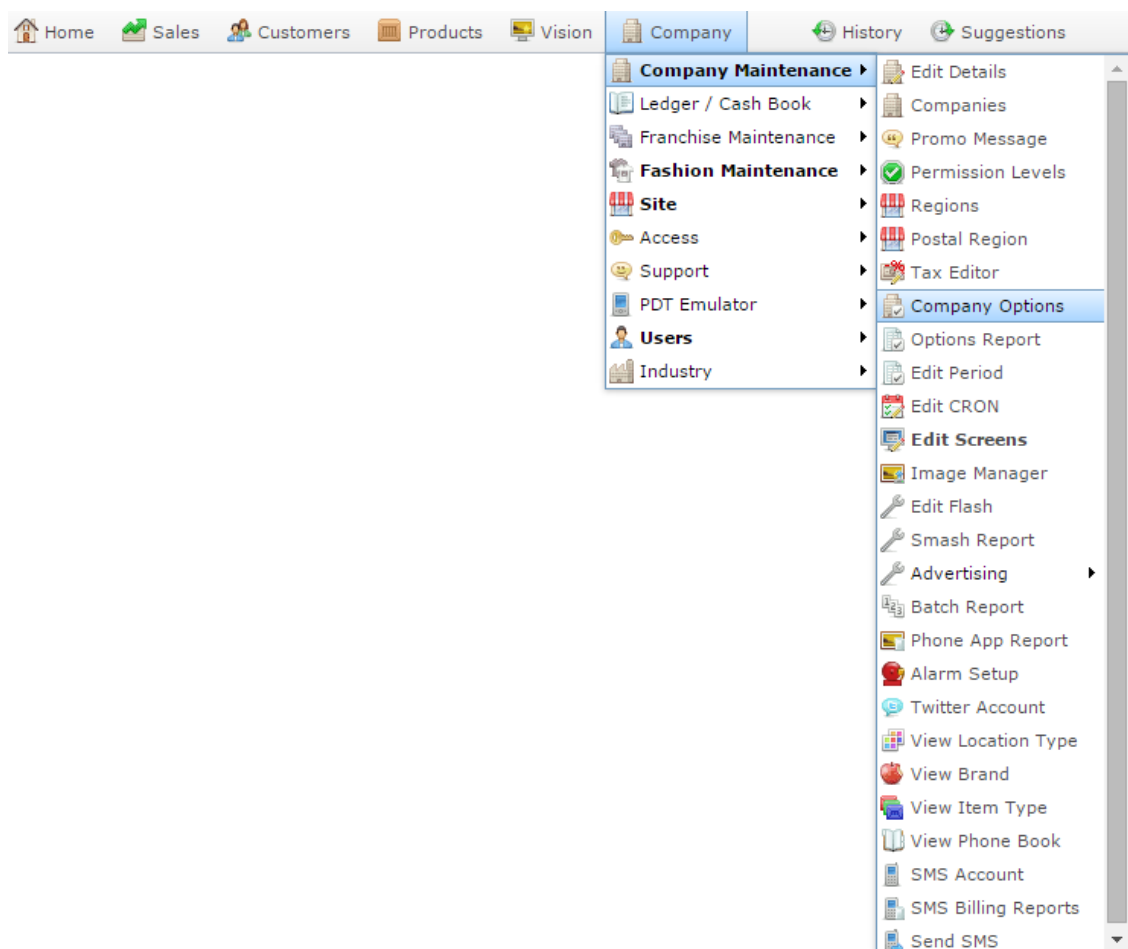
Use the Company Options - Loyalty Events section to configure your company for customer loyalty reward systems.

Note: There are several sections for configuring loyalty within your company. Also see: *Configuring your company for loyalty information* on page 21, *Configuring your company for loyalty emails* on page 25, and *Configuring your company for loyalty* on page 14.

Opening the Company Options - Loyalty Events section

To open the Company Options - Loyalty Events section:

1. Press  **Company**.
2. Press **Company Maintenance > Company Options**.



The Artist section of the Company Options screen is displayed.

3. Open the **Section** drop-down list.

Managing loyalty

Options Maintenance

Company: Example Company

Configuration

Group: Portal

Section: Artist

Name	Value	Description
Artist Label	Artist	Set to to match company requirements
CD Label Label	CD Label	Set to to match company requirements
Catalog Label	Catalog	Set to to match company requirements
Release Date Label	Release Date	Set to to match company requirements
Title Label	Title	Set to to match company requirements

Update Delete

4. Press **Loyalty Events** from the **Section** drop-down list.

The Loyalty Events section is displayed.

Options Maintenance

Company: AMC Master

Configuration

Group: Portal

Section: Loyalty Events

Name	Value	Description
From		Set to 'From' where customer sees email is from
Reply Address		Set to address where Client replies to, leave blank for portal default
Return Address		Set to address where eMail Server messages return to, leave blank for portal default

Update Delete

Company Options - Loyalty section key fields and buttons

Field	Description
From	Set the 'from' name that appears in customer's inboxes as who the email is from.
Reply Address	Set the address that emails are directed to when a customer replies to a loyalty email. If you want to use the Portal default, leave this field blank.
Return Address	Set the email address that messages from the server are sent to, for example regarding unsuccessful mailing attempts. If you want to use the Portal default, leave this field blank.

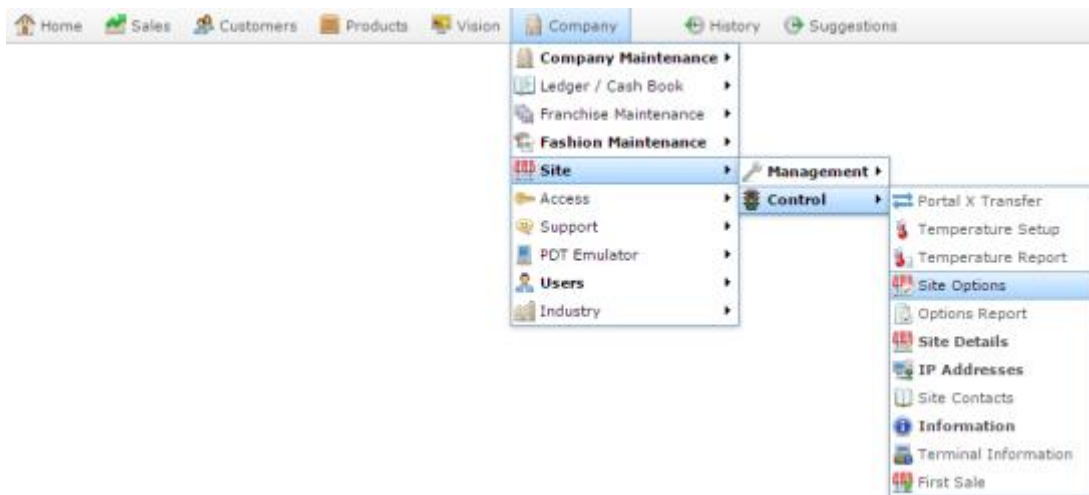
Configuring your site for loyalty

Use the Site Options - Loyalty section to configure your site for customer loyalty rewards systems.

Opening the Site Options - Loyalty section

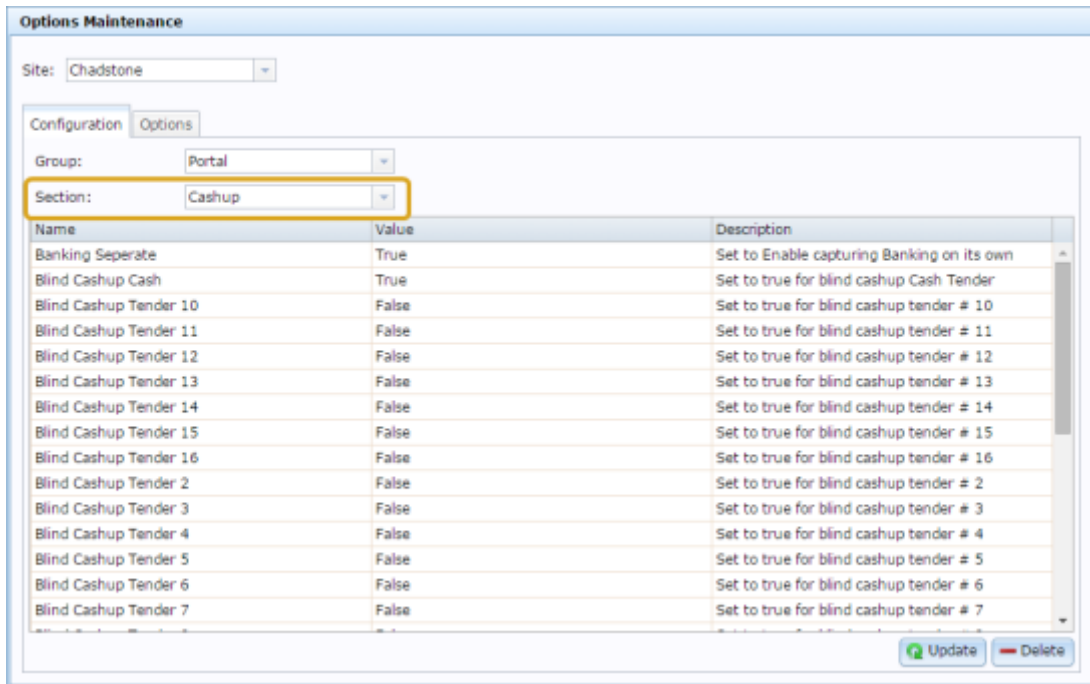
To open the Site Options - Loyalty section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



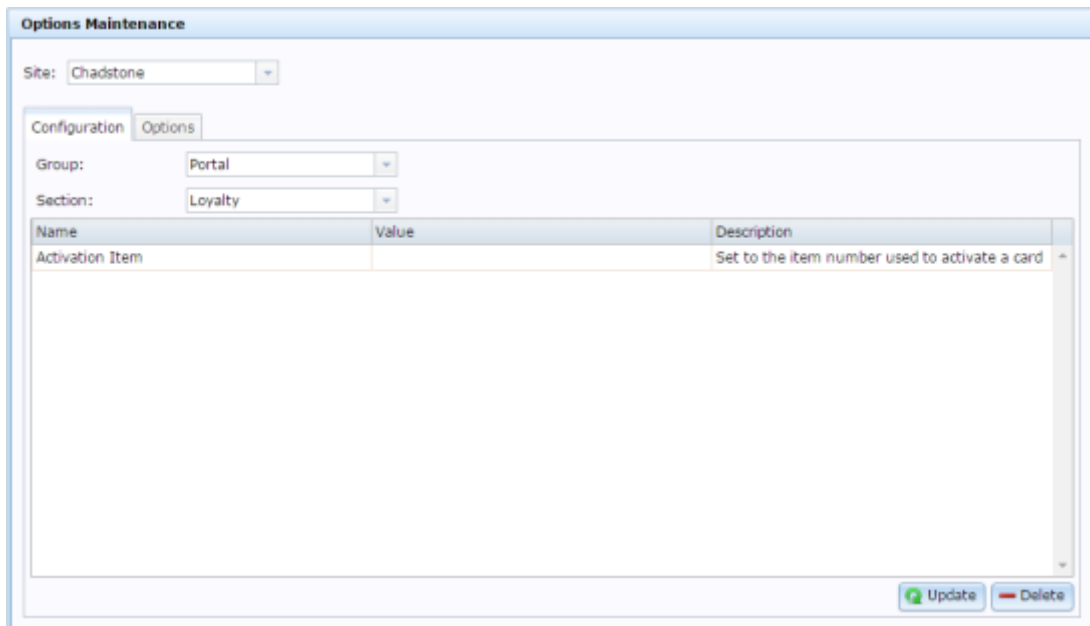
The Cashup section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.



4. Press **Loyalty** from the **Section** drop-down list.

The Loyalty section is displayed.



Site Options -Loyalty section key fields and buttons

Field	Description
Activation Item	Type the item code used to activate a loyalty card through the Point of Sale.

Managing loyalty departments

Create loyalty department settings to manage how items within a department award loyalty points, and how they can be redeemed.

See:

- *Loyalty Department Maintenance screen* on page 46
- *Loyalty Department Defaults report* on page 43.

What you can do:

- *Creating a loyalty department setting* on page 36.
- *Editing a loyalty department setting* on page 39.
- *Deleting a loyalty department setting* on page 41.

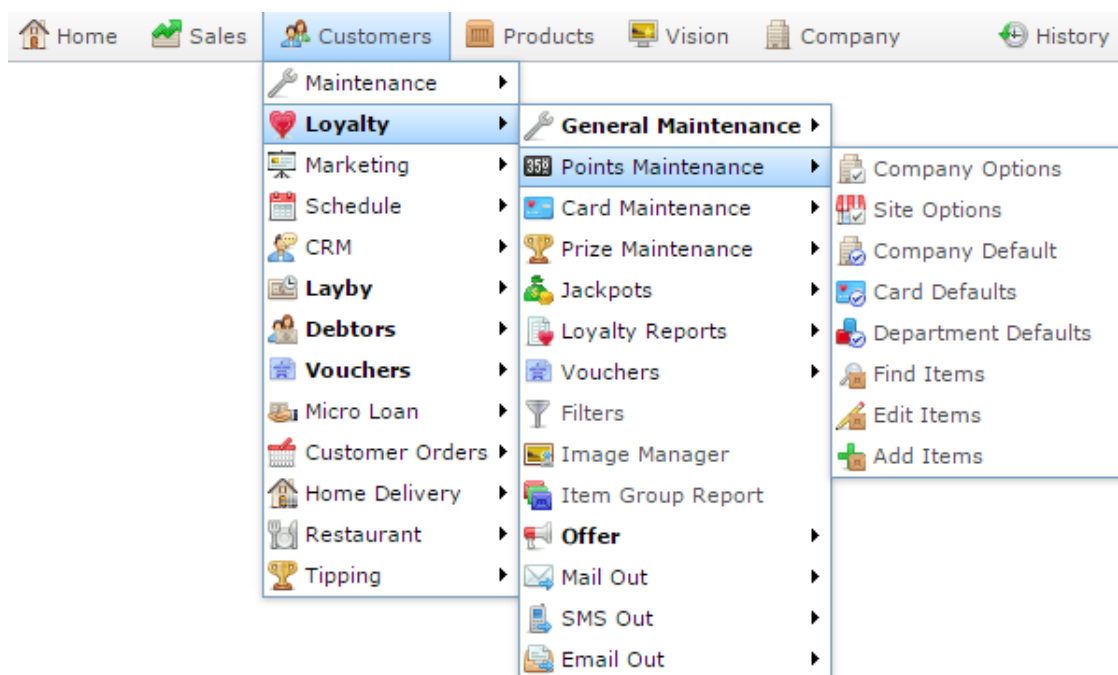
Creating a loyalty department setting

Create a loyalty department setting when you want to define specific loyalty discounts, bonuses and points settings for sites, departments or card types. For example, if you want your highest-tier rewards card to have special discounts in certain departments.

Note: Any per-item loyalty configurations you have created via Frequent Shopper Items override loyalty department settings. Loyalty department settings override the Card Type discount and points settings or Company settings. See *Loyalty Card Type Maintenance screen* on page 162. Also see *Creating a frequent shopper item* on page 321.

To create a loyalty department setting:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Department Defaults.**



The Loyalty Department Defaults report is displayed.

Loyalty Department Defaults

Site	Department	Card Type	Discount%	Points	Redeem Points	Bonus	Changed Date
AMC	Meats	All	10	1	25	0	12/05/2014
Chadstone	Turkey/Duc	Default	10	1	25	5	22/09/2015
Fusion	Beef	All	10	1	25	0	13/05/2014

Add to Favourites

Create New Type

3. Press

Create New Type

The Loyalty Department Maintenance screen is displayed.

4. Select the site you want to create a setting for in the **Site** drop-down field.

Tip: If you want to create a setting across all sites, select **All**.

5. Select the department you want to create a setting for in the **Department** drop-down field.

Tip: If you want to create a setting across all departments, select **All**.

6. Select the card type you want to create a setting for in the **Card Type** drop-down field.

Tip: If you want to create a setting across all card types, select **All**.

7. If you want to provide a discount, type the percentage discount in the **Discount** field.

For example, to provide a 20% discount, type **20**.

8. If you want to override the points received per dollar for this site, department or card type, type the number of points a loyalty member receives for every dollar they spend in the **Points per \$** field.

For example, if you want to reward your loyalty members with 10 points for every dollar spent, type **10**. A loyalty member who spends \$20 receives 200 points.

Managing loyalty departments

9. If you want to override the number of points a loyalty member must redeem per dollar for this site, department or card type, type it in the **Redeem Points per \$** field.

For example, if you want your loyalty members to redeem 100 points for each dollar, type **100**. If a loyalty member wants to pay for a \$30 transaction with loyalty points, they must redeem 3000 loyalty points.

10. If you want to assign bonus loyalty points to a loyalty member for each transaction, type it in the **Bonus Points per Sale** field.

For example, if you want a loyalty member to receive 10 bonus loyalty points every time they complete a transaction with you, type **10**. A customer who makes 10 transactions receives 100 bonus points.

11. Press .

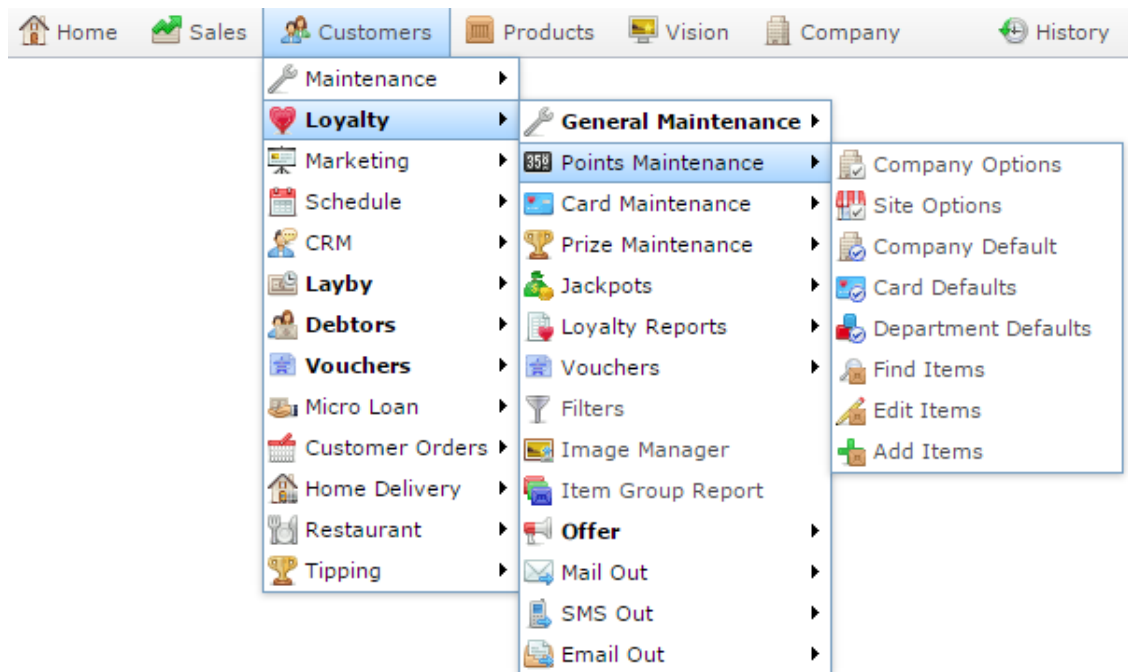
The loyalty settings are saved.

Editing a loyalty department setting

Edit a loyalty department setting when you want to change the specific loyalty discounts, bonuses and points settings for sites, departments or card types.

To edit a loyalty department setting:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Department Defaults.**



The Loyalty Department Defaults report is displayed.

Loyalty Department Defaults

Site	Department	Card Type	Discount%	Points	Redeem Points	Bonus	Changed Date
AMC	Meats	All	10	1	25	0	12/05/2014
Chadstone	Turkey/Duc	Default	10	1	25	5	22/09/2015
Fusion	Beef	All	10	1	25	0	13/05/2014

Buttons: Add to Favourites, Create New Type

3. Press the Loyalty Department you want to edit.

The Loyalty Department Maintenance screen is displayed.

The screenshot shows the 'Loyalty Department Maintenance' interface. It features a 'Defaults' tab and several configuration fields. The 'Site', 'Department', and 'Card Type' fields are dropdown menus, all currently set to 'All'. The 'Discount', 'Points per \$', 'Redeem Points per \$', and 'Bonus Points per Sale' fields are text input boxes. At the bottom right, there are three buttons: 'Delete', 'Save', and 'Reset'.

4. Select the site you want to edit the setting for in the **Site** drop-down field.

Tip: If you want to edit a setting that was created across all sites, select **All**.

5. Select the department you want to edit the setting for in the **Department** drop-down field.

Tip: If you want to edit a setting that was created across all departments, select **All**.

6. Select the card type you want to edit the setting for in the **Card Type** drop-down field.

Tip: If you want to edit a setting that was created across all card types, select **All**.

7. The loyalty setting is displayed.

Note: If the existing settings are not displayed, you may have selected the wrong Site, Department or Card Type.

8. Make the required changes.

See *Loyalty Department Maintenance* screen on page 46.

9. Press  Save.

The loyalty settings are saved.

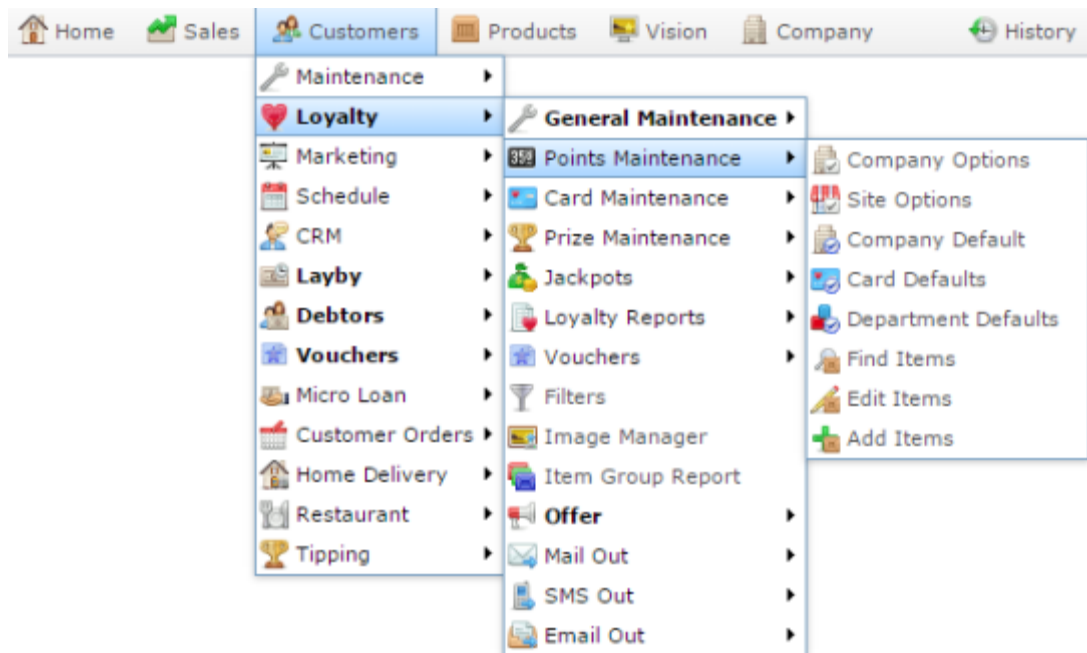
Deleting a loyalty department setting

Delete a loyalty department setting when you want to remove the specific loyalty discounts, bonuses and points settings for sites, departments or card types.

Note: Points and discounts that have already been awarded are not affected.

To delete a loyalty department setting:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Department Defaults.**



The Loyalty Department Defaults report is displayed.

Loyalty Department Defaults

Site	Department	Card Type	Discount%	Points	Redeem Points	Bonus	Changed Date
AMC	Meats	All	10	1	25	0	12/05/2014
Chadstone	Turkey/Duc	Default	10	1	25	5	22/09/2015
Fusion	Beef	All	10	1	25	0	13/05/2014

Buttons: Add to Favourites, Create New Type

3. Press the Loyalty Department you want to delete.

The Loyalty Department Maintenance screen is displayed.

The screenshot shows a web form titled "Loyalty Department Maintenance" with a "Defaults" tab. The form contains several fields: "Site:" with a dropdown menu set to "All"; "Department:" with a dropdown menu set to "All"; "Card Type:" with a dropdown menu set to "All"; "Discount:" with an empty text input field; "Points per \$:" with an empty text input field; "Redeem Points per \$:" with an empty text input field; and "Bonus Points per Sale:" with an empty text input field. At the bottom right of the form are three buttons: "Delete" (with a red minus icon), "Save" (with a floppy disk icon), and "Reset" (with a circular arrow icon).

4. Select the site you want to delete the setting for in the **Site** drop-down field.

Tip: If you want to delete a setting that was created across all sites, select **All**.

5. Select the department you want to delete the setting for in the **Department** drop-down field.

Tip: If you want to delete a setting that was created across all departments, select **All**.

6. Select the card type you want to delete the setting for in the **Card Type** drop-down field.

Tip: If you want to delete a setting that was created across all card types, select **All**.

7. The loyalty setting is displayed.

Note: If the existing settings are not displayed, you may have selected the wrong Site, Department or Card Type.

8. Press  .

The loyalty settings are deleted.

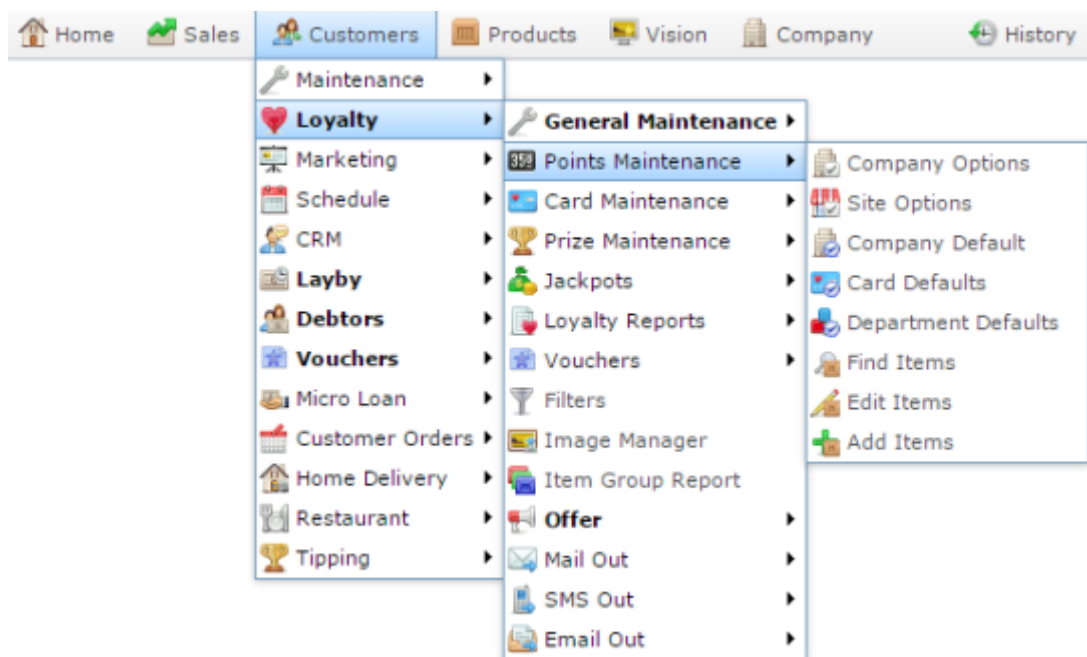
Loyalty Department Defaults report

Use the Loyalty Department Defaults report to view the department defaults created for loyalty, create new departments or edit existing departments.

Opening the Loyalty Department Defaults report

To open the Loyalty Department Defaults report:

1. Press  Customers .
2. Press **Loyalty > Points Maintenance > Department Defaults.**



The Loyalty Department Defaults report is displayed.

Loyalty Department Defaults

Site	Department	Card Type	Discount%	Points	Redeem Points	Bonus	Changed Date
AMC	Meats	All	10	1	25	0	12/05/2014
Chadstone	Turkey/Duc	Default	10	1	25	5	22/09/2015
Fusion	Beef	All	10	1	25	0	13/05/2014

Buttons: Add to Favourites, Create New Type

Loyalty Department Defaults report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Create New Type	Press to create a new loyalty department type.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Department	Name of the loyalty department
Card Type	Applicable loyalty card types for this loyalty department.
Discount %	Default discount applied to this loyalty department.
Points	Default points accrued per dollar spent in this department.
Redeem Points	Default points redeemed per dollar in this department.
Bonus	Default bonus points awarded in this department.
Changed Date	Date this loyalty department was last edited.

Loyalty Department Maintenance screen

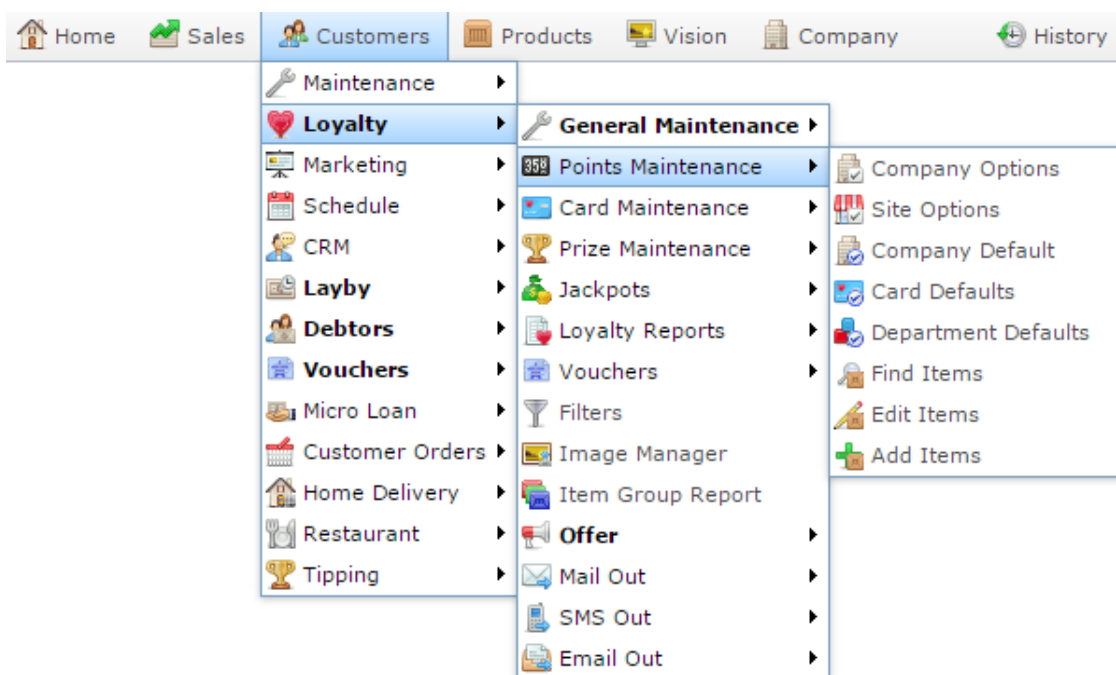
Use the Loyalty Department Maintenance screen to create default loyalty settings for departments. You can use these to control the loyalty points, bonuses, discounts and redemptions that loyalty members receive by site, department and card type.

Note: Any per-item loyalty configurations you have created via Frequent Shopper Items override loyalty department settings. Loyalty department settings override the Card Type discount and points settings or Company settings. See *Loyalty Card Type Maintenance screen* on page 162. Also see *Creating a frequent shopper item* on page 321.

Opening the Loyalty Department Maintenance screen

To open the Loyalty Department Maintenance screen:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Department Defaults.**



The Loyalty Department Defaults report is displayed.

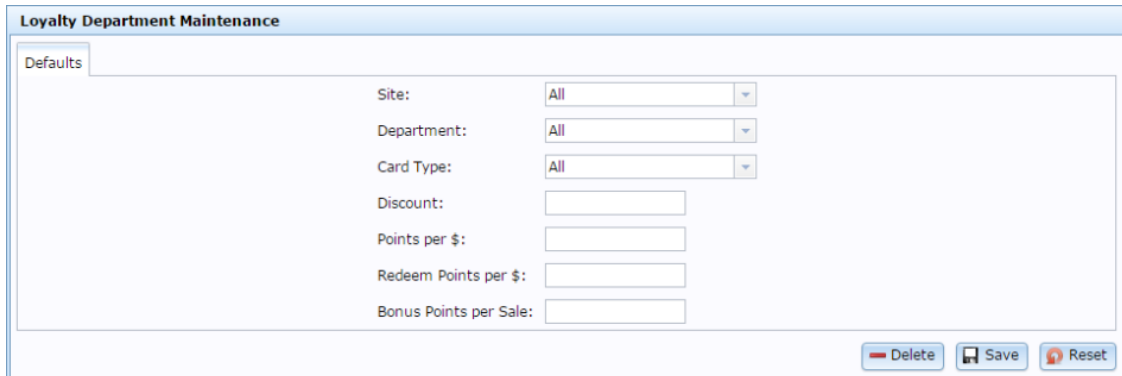
Loyalty Department Defaults

Site	Department	Card Type	Discount%	Points	Redeem Points	Bonus	Changed Date
AMC	Meats	All	10	1	25	0	12/05/2014
Chadstone	Turkey/Duc	Default	10	1	25	5	22/09/2015
Fusion	Beef	All	10	1	25	0	13/05/2014

Buttons: Add to Favourites, Create New Type

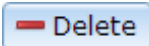
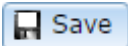
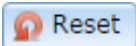
3. Press the Loyalty Department you want to edit.

The Loyalty Department Maintenance screen is displayed.



Loyalty Department Maintenance screen key fields and buttons

Field	Description
Site	<p>Select the site to create a loyalty setting for, or All to create a setting for all sites.</p> <p>Note: If you want to navigate to a specific loyalty setting, select the site the loyalty setting is for.</p>
Department	<p>Select the department to create a loyalty setting for, or All to create a setting for all departments.</p> <p>Note: If you want to navigate to a specific loyalty setting, select the department the loyalty setting is for.</p>
Card Type	<p>Select the card type to create a loyalty setting for, or All to create a setting for all card types.</p> <p>Note: If you want to navigate to a specific loyalty setting, select the card type the loyalty setting is for.</p>

Field	Description
Discount	Type the discount to apply to the selected sites, departments and card types. <div data-bbox="489 495 1394 624" style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 5px;">Note: Loyalty department discounts are only available through the PosPortal Point of Sale.</div>
Points per \$	Type the points earned per dollar spent for the selected sites, departments and card types. For example, if you want loyalty members to accrue 10 points for each dollar they spend, type 10 . A \$10 purchase will award the loyalty member with 100 points.
Redeem Points per \$	Type the number of points redeemed per dollar for the selected sites, departments and card types. For example, if you want loyalty members to redeem 25 points for each dollar, type 25 . The loyalty member will redeem 250 points to pay for a \$10 transaction.
Bonus Points per Sale	Type the number of points awarded as a bonus for each transaction for the selected sites, departments and card types.
	Delete the selected loyalty settings.
	Save any changes made to the selected loyalty settings.
	Undo any changes made to the selected loyalty settings since they were last saved.

Managing loyalty members

You can manage loyalty member accounts to maintain customer contact details, the loyalty card type, loyalty groups, family memberships and other information.

Also see:

- *Member Maintenance screen* on page 106.
- *Process Lost Cards Report* on page 103.
- *Loyalty Family Cards report* on page 100.
- *Loyalty Expired Cards report* on page 97.
- *Import Pending Upload report* on page 88.
- *Online Card Import screen* on page 126.

What you can do:

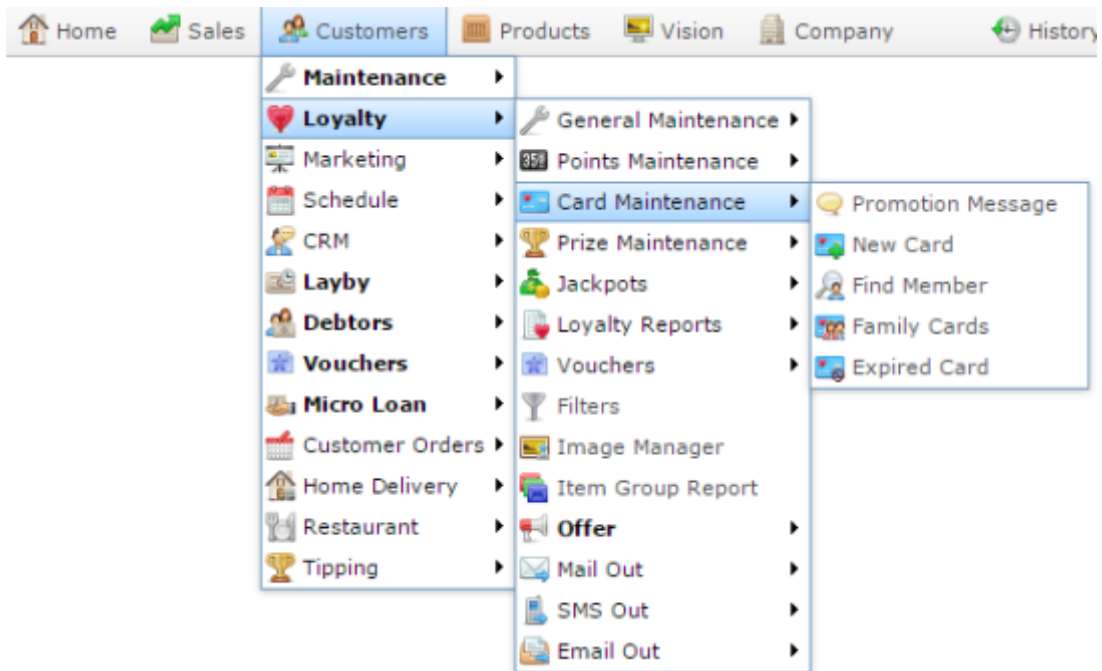
- *Creating a new loyalty member* on page 50
- *Editing a loyalty member* on page 61.
- *Finding a loyalty member* on page 53.
- *Adding a loyalty member to a loyalty group* on page 186.
- *Removing a loyalty member from a loyalty group* on page 188.
- *Replacing a lost or damaged card* on page 80.
- *Adding a loyalty member's photo* on page 69.
- *Adding or removing a loyalty member from a family* on page 71.
- *Creating a loyalty voucher from loyalty points* on page 78.
- *Editing a loyalty member's card type* on page 57.
- *Editing a loyalty member's contact details* on page 59.
- *Editing a loyalty member's marketing preferences* on page 63.
- *Editing a loyalty member's points accumulation* on page 66.
- *Deactivating a loyalty member* on page 82.
- *Deleting a loyalty member* on page 85.
- *Importing loyalty cards* on page 86.
- *Preparing a loyalty CSV file for import* on page 91.
- *Synchronising loyalty information* on page 96.

Creating a new loyalty member

Create a new loyalty member to add the member information to your Portal and provide loyalty rewards for that customer.

To create a new loyalty member:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > New Card**.



The Member Maintenance screen is displayed.

Member Name:
Member Number: New Customer [] * indicates compulsory field

Name Card Control Points Transactions Family Groups External Related Voucher Replacement Surveys Photo

Member Number: New Customer Address: Referral: None
Prefix: Other Referral:
Title: Please Select Suburb: Staff Name:
First Name *: State: Comments:
Surname *: Country:
Suffix: Post Code:
Contact Name:
Home Phone:
Work Phone:
Mobile:
Fax:
Email Address:

Find Card Add / Update

3. Select the title of the loyalty member in the **Title** drop-down field. For example, **Dr.**
4. Type the given name of the loyalty member in the **First Name** field.
5. Type the family name of the loyalty member in the **Surname** field.

Member Name:
Member Number: New Customer [] * indicates compulsory field

Name Card Control Points Transactions Family Groups External Related Voucher Replacement Surveys Photo

Member Number: New Customer Address: Referral: None
Prefix: Other Referral:
Title: Please Select Suburb: Staff Name:
First Name *: State: Comments:
Surname *: Country:
Suffix: Post Code:
Contact Name:
Home Phone:
Work Phone:
Mobile:
Fax:
Email Address:

Find Card Add / Update

6. Press the Card tab.
The Card tab is displayed.

Managing loyalty members

The screenshot shows the 'Member Maintenance - Example company' form with the 'Card' tab selected. The form contains the following fields:

- Member Name:
- Member Number: * indicates compulsory field
- Card Number:
- PIN:
- Join Date: 1/01/1970
- Occupation:
- Expiry Date: 6/10/2016
- Reference:
- Card Type: Default
- Source Site: Chadstone
- Points Rule - Follow Card: False
- Card Active: True
- Gender: Please Select
- Date of Birth: 1/01/1900
- Description:

At the bottom right, there are 'Find Card' and 'Add / Update' buttons.

7. Type the new card number in the **Card Number** field.

This screenshot is identical to the previous one, but the 'Card Number' field is highlighted with a yellow border, indicating it is the current focus for data entry.

Tip: You can add other fields before you save the card. These are just the required fields that must be completed to create the card.

8. Press .

The new card is added.

Finding a loyalty member

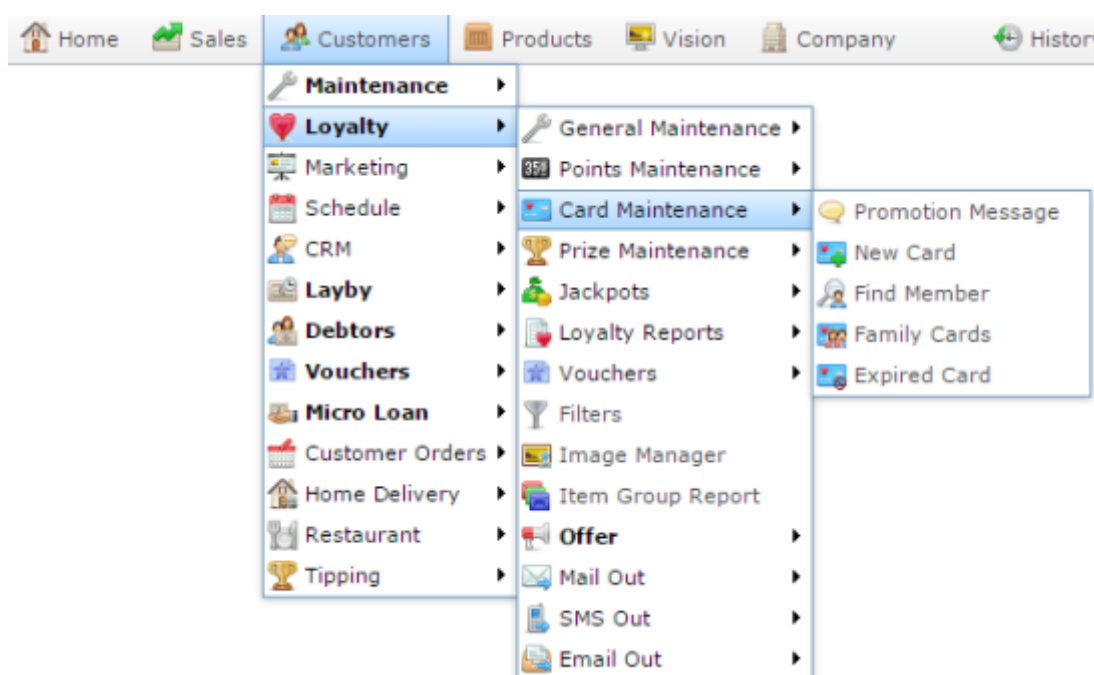
Find a loyalty member when you want to edit their loyalty account. You can either:

- List all loyalty members whose names start with a chosen letter.
- Search for a loyalty member by typing information in the search fields.

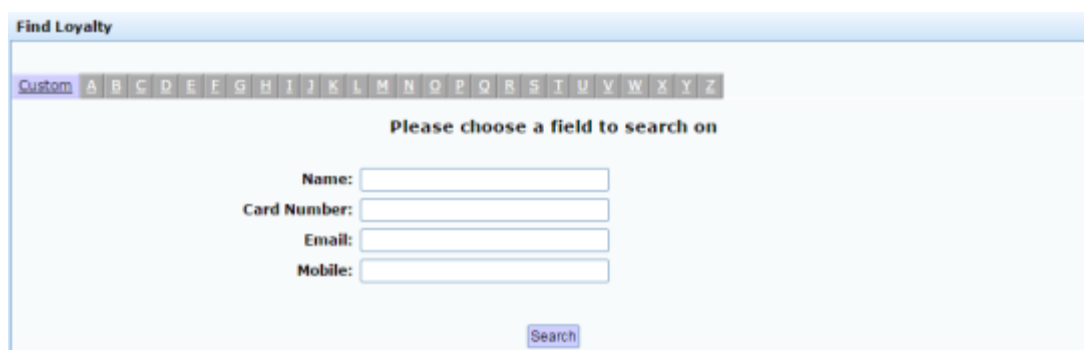
Opening the Find loyalty screen

To open the Find loyalty screen:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.



Listing all loyalty members by letter:

To list loyalty members that start with a specific letter alphabetically:

1. Press the corresponding letter of the alphabet at the top of the search screen.



Find Loyalty

Custom: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Name:

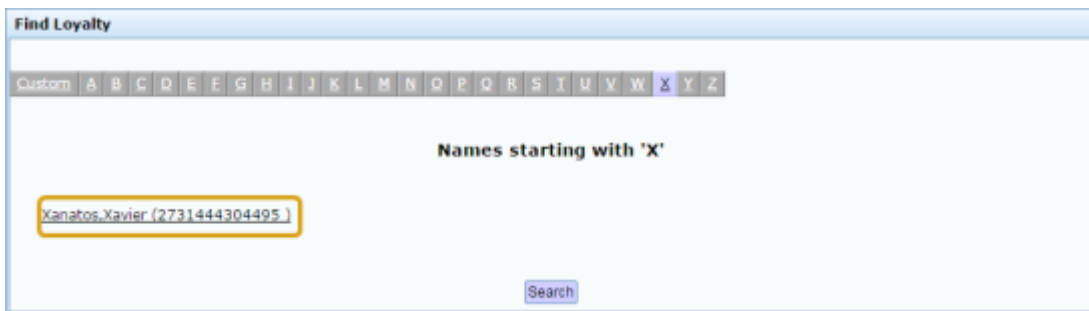
Card Number:

Email:

Mobile:

Search

The loyalty members that start with that letter are listed alphabetically.



Find Loyalty

Custom: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Names starting with 'X'

Xanatos.Xavier (2731444304495)

Search

Searching for loyalty members

You can search for a loyalty member based on their:

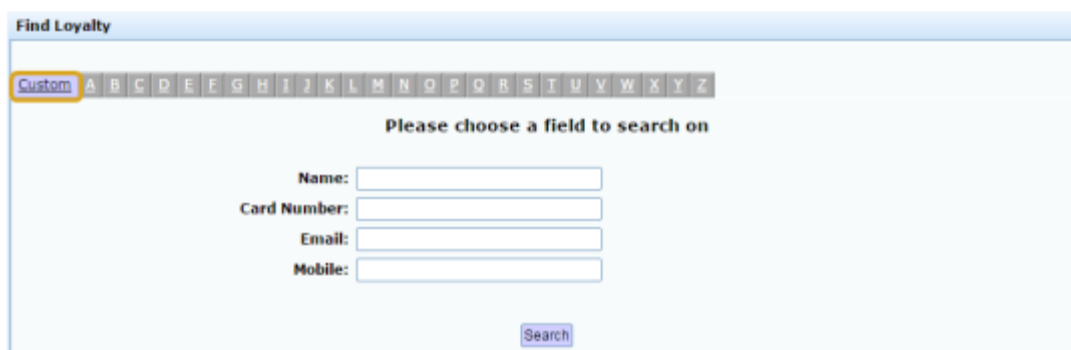
- Name.
- Loyalty card number.
- Email address.
- Mobile phone number.

The Portal searches for matches:

- Anywhere within the words of the field.
For example, **LIS** matches both **Lisa**, and **Elise**. If a field contains multiple words, it matches any word in the field.
- From the start of the loyalty card number.
For example, a search for a loyalty card number of **3** returns all loyalty card numbers starting with 3, not all loyalty member numbers that contain 3.
- Using the first search field that contains data.
For example, if you type **LIS** in the **Name** field and **3** in the **Card Number** field, the Portal ignores the **Card Number** field and searches for matches to the loyalty member name.

To search for loyalty members:

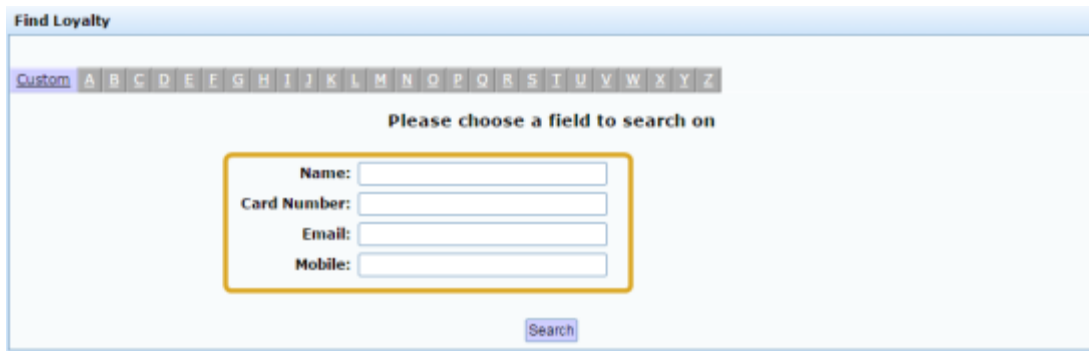
1. If the custom search fields are not displayed, press the Custom tab.



The screenshot shows a web interface titled "Find Loyalty". At the top, there is a navigation bar with a "Custom" tab highlighted in yellow and a row of letters from A to Z. Below this, the text "Please choose a field to search on" is displayed. Underneath, there are four search fields: "Name:", "Card Number:", "Email:", and "Mobile:", each followed by a text input box. At the bottom center, there is a "Search" button.

2. Type the term you want to search on in the search fields.

Managing loyalty members



The screenshot shows a web interface titled "Find Loyalty". At the top, there is a navigation bar with "Custom" and a series of letters from A to Z. Below this, the text "Please choose a field to search on" is displayed. A yellow-bordered box contains four search fields: "Name:", "Card Number:", "Email:", and "Mobile:". Each field has a corresponding text input box. Below the search fields is a "Search" button.

Note: Because the Portal uses the first field with data that it finds, you should only search for loyalty members using one search field at a time.

3. Press **Search**.

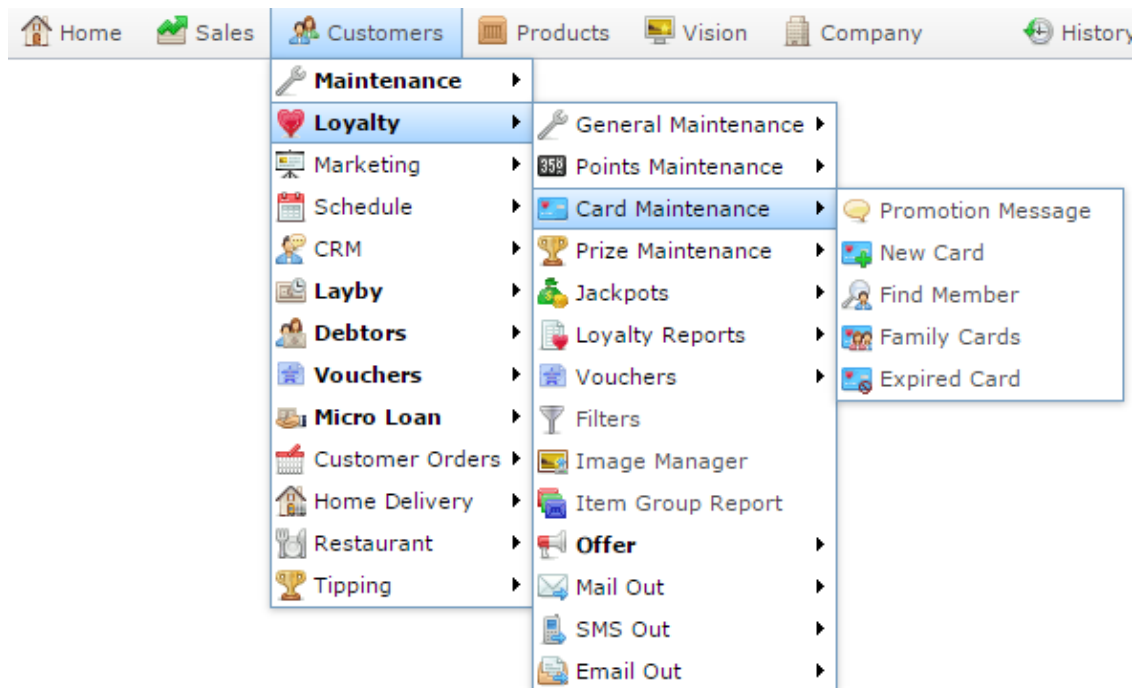
The search results are displayed.

Editing a loyalty member's card type

Edit a loyalty member's card type if you want to change them to a different loyalty card type.

To edit a loyalty member's card type:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.

The screenshot shows the 'Find Loyalty' search interface with the following elements:

- Header: Find Loyalty
- Search Method: Custom (selected) | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z
- Instruction: Please choose a field to search on
- Search Fields:
 - Name:
 - Card Number:
 - Email:
 - Mobile:
- Search Button: Search

3. Search for the loyalty member by name.

See *Finding a loyalty member* on page 53.

The Member Maintenance screen is displayed.

Managing loyalty members

Member Maintenance - Example company

Member Name: Xanatos,Xavier
Member Number: 10002199 [2731444304495] * indicates compulsory field

Member Number: 10002199 Address: Referral: None

Prefix: Other Referral:

Title: Dr Suburb: Staff Name:

First Name *: Xavier State: VIC Comments:

Surname *: Xanatos Country: Australia

Suffix: Post Code: 3167

Contact Name:

Home Phone: 0945698725

Work Phone:

Mobile: 0416659785

Fax:

Email Address: XavXan@email.com

Find Card Add / Update

See *Member Maintenance* screen on page 106.

4. Press the Card tab.

The Card tab is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
Member Number: 10002199 [2731444304495] * indicates compulsory field

Card Control Points Transactions Family Groups External Related Voucher Replacement Surveys Photo

Card Number 2731444304495 PIN :

Join Date : 6/10/2015 Occupation:

Expiry Date : 6/10/2016 Reference :

Card Type: Default Source Site : Chadstone

Points Rule - Follow Card : False

Card Active : True

Gender: Please Select

Date of Birth: 1/01/1900

Description :

Find Card Add / Update

5. Select the new type in the **Card Type** drop-down field.

6. Press **Add / Update**.

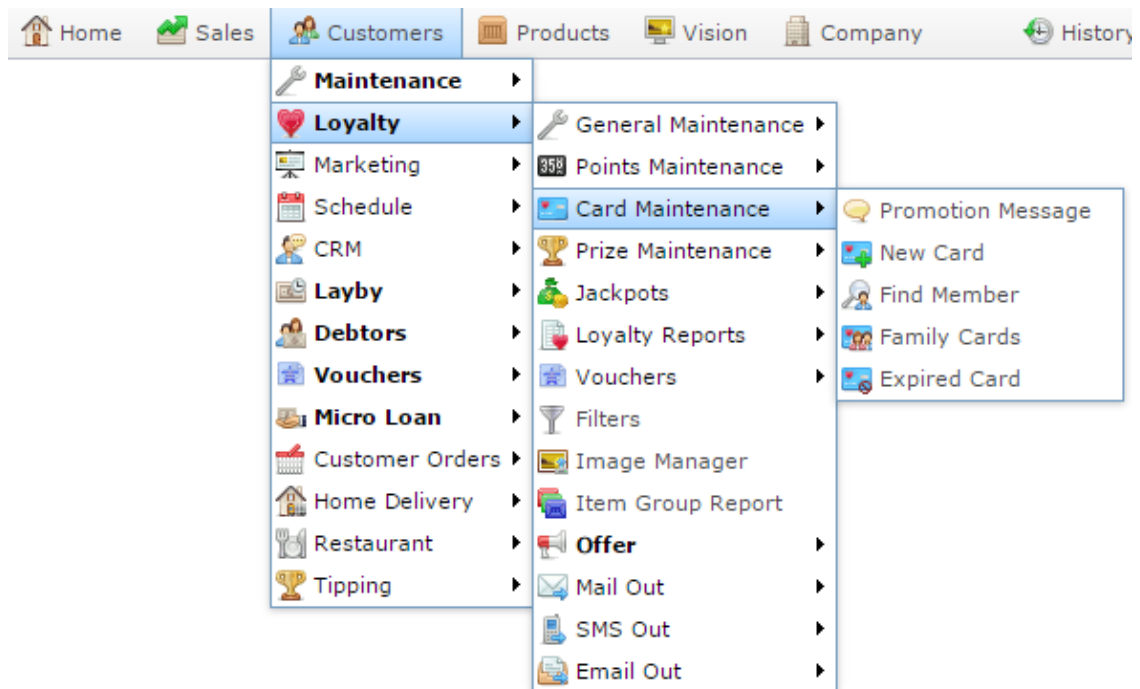
The changes are saved.

Editing a loyalty member's contact details

Edit a loyalty member's contact details if you need to change their name or address.

To edit a loyalty member's contact details:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.

The 'Find Loyalty' screen features a search interface with the following elements:

- A header bar with the text 'Find Loyalty'.
- A row of buttons labeled 'Custom', 'A', 'B', 'C', 'D', 'E', 'F', 'G', 'H', 'I', 'J', 'K', 'L', 'M', 'N', 'O', 'P', 'Q', 'R', 'S', 'T', 'U', 'V', 'W', 'X', 'Y', 'Z'.
- The instruction: 'Please choose a field to search on'.
- Four search fields:
 - Name:
 - Card Number:
 - Email:
 - Mobile:
- A 'Search' button at the bottom center.

3. Search for the loyalty member by name.
See *Finding a loyalty member* on page 53.
The Member Maintenance screen is displayed.

Managing loyalty members

Member Maintenance - Example company

Member Name: Xanatos,Xavier
Member Number: 10002199 [2731444304495] * indicates compulsory field

Name Card Control Points Transactions Family Groups External Related Voucher Replacement Surveys Photo

Member Number: 10002199 Address: Referral:

Prefix:

Title: Suburb:

Other Referral:

First Name *: State: Staff Name:

Surname *: Country: Comments:

Suffix: Post Code:

Contact Name:

Home Phone:

Work Phone:

Mobile:

Fax:

Email Address:

See *Member Maintenance* screen on page 106.

4. Make the required changes in the contact fields.
5. Press .

The loyalty member is updated.

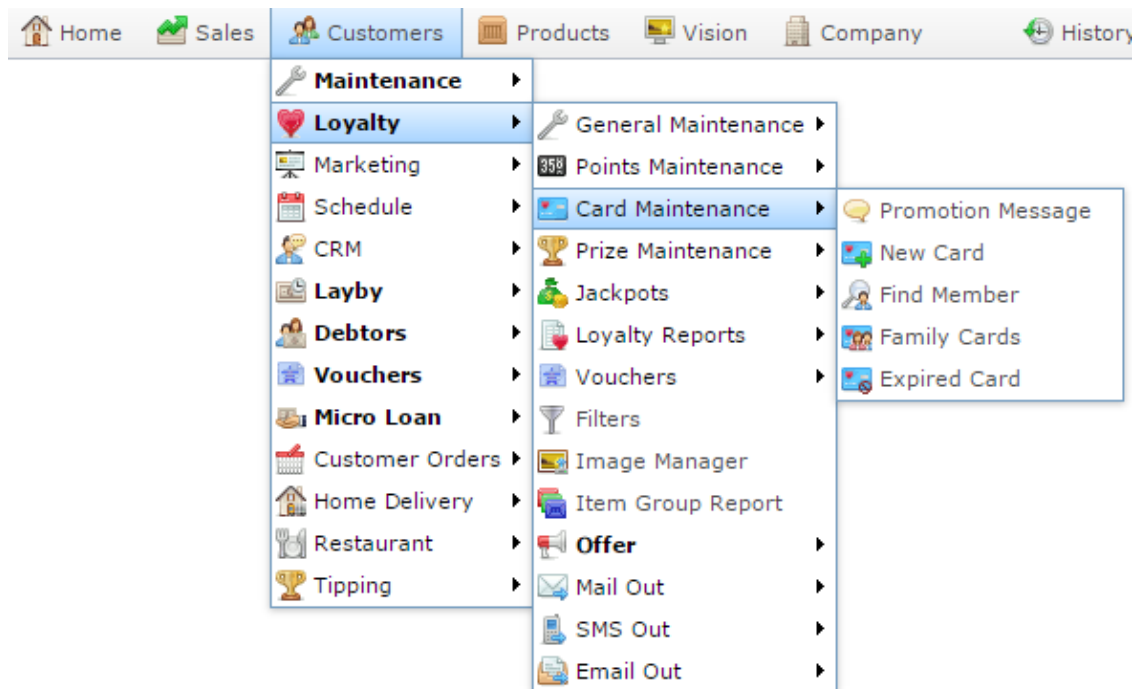
Editing a loyalty member

Edit a loyalty member's information when you want to:

- Change their contact details, such as their name or address.
- Change the type of card or how they accumulate loyalty points or rewards.
- Change whether they receive jackpots, mail-outs or SMS messages from your company.
- Add or remove them from family relationships or loyalty groups.
- View the transactions and external transactions for the loyalty member.
- Convert loyalty points to a loyalty voucher.
- Replace a lost or broken card for the loyalty member.
- Upload or change their member photo.

To edit a loyalty member:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member.**



The Find Loyalty screen is displayed.

Managing loyalty members

The screenshot shows a web interface titled "Find Loyalty". At the top, there is a navigation bar with "Custom" selected and a row of letters from A to Z. Below this, the text "Please choose a field to search on" is centered. There are four input fields labeled "Name:", "Card Number:", "Email:", and "Mobile:". A "Search" button is located at the bottom center of the form.

3. Search for the loyalty member by name.

See *Finding a loyalty member* on page 53.

The Member Maintenance screen is displayed.

The screenshot shows a web interface titled "Member Maintenance - Example company". It displays the following information:

- Member Name: Xanatos,Xavier
- Member Number: 10002199 [2731444304495] * indicates compulsory field

Below this information is a tabbed interface with the following tabs: Name, Card, Control, Points, Transactions, Family, Groups, External, Related, Voucher, Replacement, Surveys, Photo. The "Name" tab is selected.

The form contains the following fields:

- Member Number: 10002199
- Address: [Empty]
- Referral: None
- Prefix: [Empty]
- Other Referral: [Empty]
- Title: Dr (dropdown menu)
- Suburb: [Empty]
- Staff Name: [Empty]
- First Name *: Xavier
- State: VIC
- Comments: [Empty]
- Surname *: Xanatos
- Country: Australia
- Suffix: [Empty]
- Post Code: 3167
- Contact Name: [Empty]
- Home Phone: 0945698725
- Work Phone: [Empty]
- Mobile: 0416659785
- Fax: [Empty]
- Email Address: XavXan@email.com

At the bottom right, there are two buttons: "Find Card" and "Add / Update".

See *Member Maintenance screen* on page 106.

4. Make the required changes.
5. Press **Add / Update**.

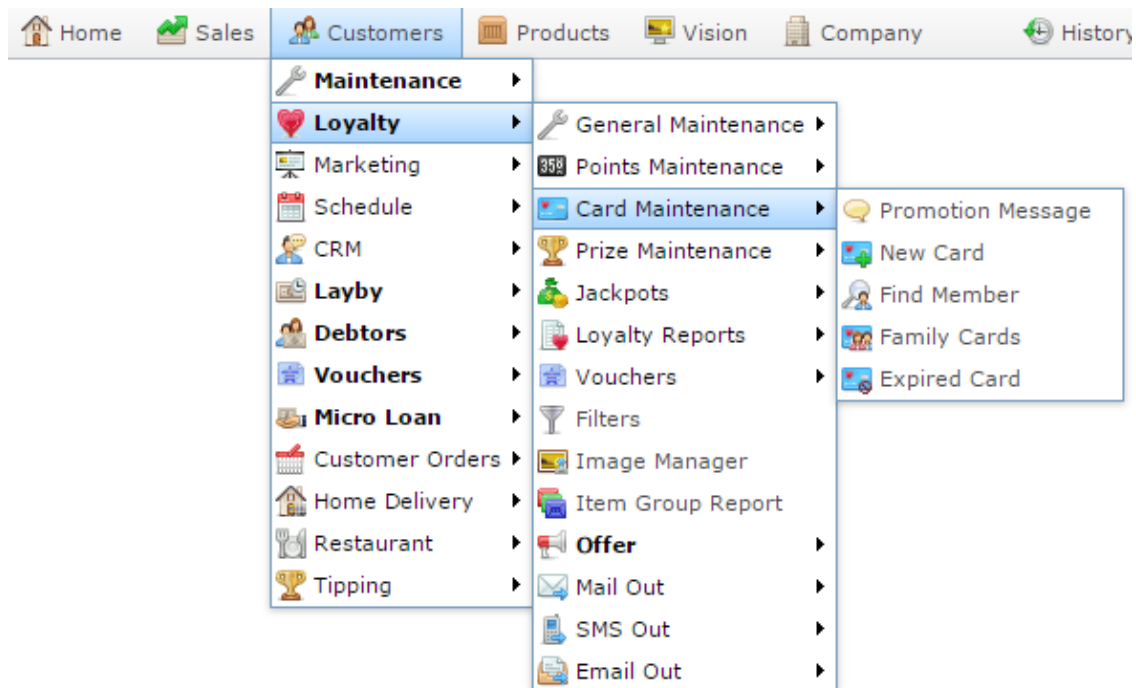
The changes are saved.

Editing a loyalty member's marketing preferences

Edit a loyalty member's marketing preferences to change whether they receive jackpots, SMS or email mail-outs.

To edit a loyalty member's marketing preferences:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.

Find Loyalty

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Name:

Card Number:

Email:

Mobile:

3. Search for the loyalty member by name.

See *Finding a loyalty member* on page 53.

The Member Maintenance screen is displayed.

Managing loyalty members

Member Maintenance - Example company

Member Name: Xanatos,Xavier
Member Number: 10002199 [2731444304495] * indicates compulsory field

Member Number: 10002199 Address: Referral: None

Prefix: Other Referral:

Title: Dr Suburb: Staff Name:

First Name *: Xavier State: VIC Comments:

Surname *: Xanatos Country: Australia

Suffix: Post Code: 3167

Contact Name:

Home Phone: 0945698725

Work Phone:

Mobile: 0416659785

Fax:

Email Address: XavXan@email.com

Find Card Add / Update

See *Member Maintenance* screen on page 106.

4. Press the Control tab.
5. The Control tab is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
Member Number: 10002199 [2731444304495] * indicates compulsory field

Name Card **Control** Points Transactions Family Groups External Related Voucher Replacement Surveys Photo

Jackpot: Opt In

Mail: Opt In

Email: Opt In

Email Confirmation: False

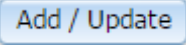
Email Opt In: False

SMS: Opt In

Purged: False

Find Card Add / Update

6. Select **Opt In** in the **Jackpot**, **Mail**, **Email** or **SMS** fields to include the loyalty member in those marketing streams.
7. Select **Opt Out** in the **Jackpot**, **Mail**, **Email** or **SMS** fields to exclude the loyalty member from those marketing streams.

8. Press .

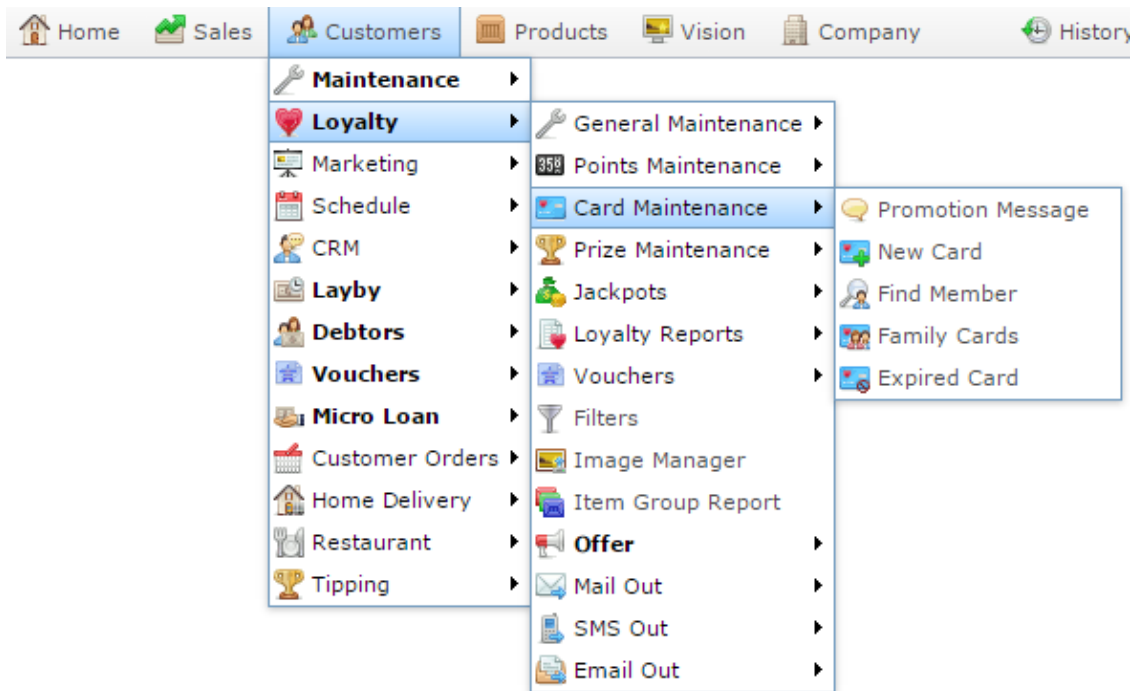
The loyalty member is updated.

Editing a loyalty member's points accumulation

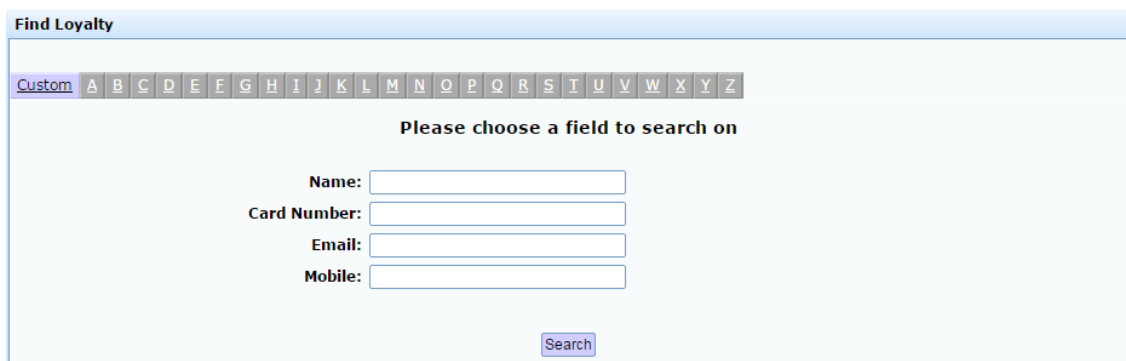
Edit a loyalty member's points accumulation if you want to create specific rules for how that loyalty member accrues or redeems points.

To edit a loyalty member's points accumulation:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.

A screenshot of the 'Find Loyalty' search screen. At the top, there is a 'Custom' dropdown and a row of buttons for each letter of the alphabet (A-Z). Below this, the text 'Please choose a field to search on' is displayed. There are four input fields labeled 'Name:', 'Card Number:', 'Email:', and 'Mobile:'. A 'Search' button is located at the bottom right of the form.

3. Search for the loyalty member by name.

See *Finding a loyalty member* on page 53.

The Member Maintenance screen is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Member Number: 10002199 Address: Referral:

Prefix: Other Referral:

Title: Suburb: Staff Name:

First Name *: State: Comments:

Surname *: Country:

Suffix: Post Code:

Contact Name:

Home Phone:

Work Phone:

Mobile:

Fax:

Email Address:

See Member Maintenance screen on page 106.

4. Press the Points tab.

The Points tab is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Sales to Date : 0

Sales To Year : 0

Date of Last Sale : No Transactions

Points Earned : 0

Points Redeemed : 0

Jackpot : 0

Expired : 0

Points Balance : 0

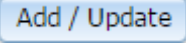
Points per \$:

Redeem Points per \$:

Discount %:

5. Type the number of points the loyalty member accrues per dollar spent in the **Points per \$** field.
6. Type the number of points the loyalty member redeems per dollar in the **Redeem Points per \$**.

Managing loyalty members

7. Press .

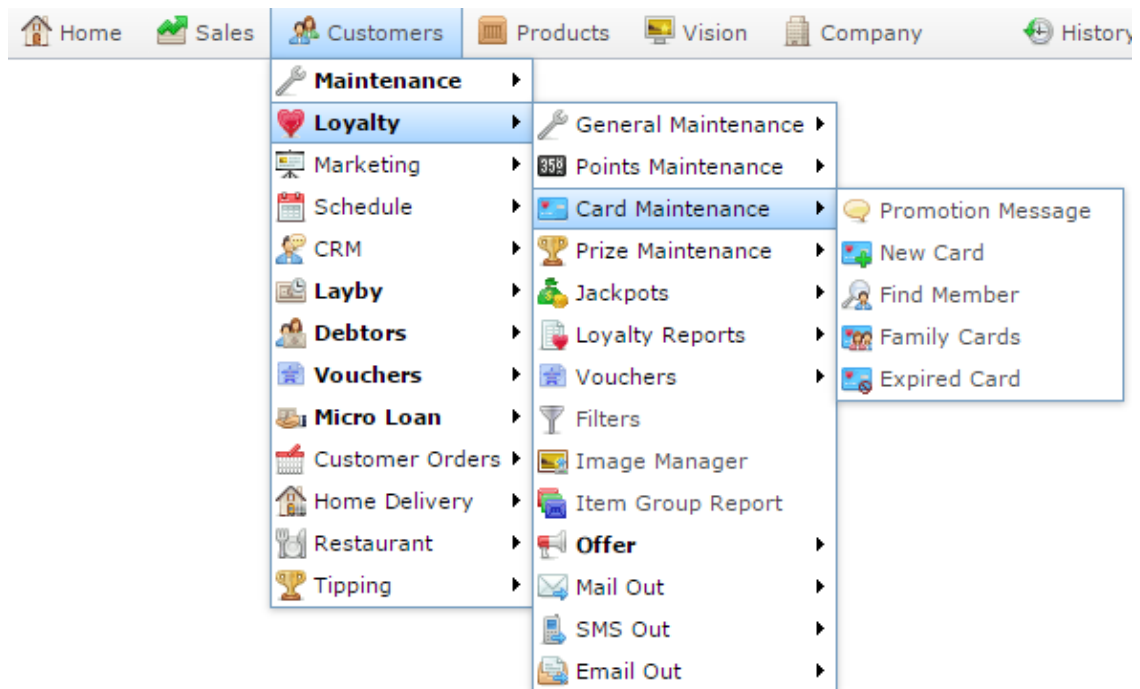
The changes are saved.

Adding a loyalty member's photo

You can upload a photo of the loyalty member to be included in their loyalty details.

To upload a photo:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.

3. Search for the loyalty member by name.
See *Finding a loyalty member* on page 53.
The Member Maintenance screen is displayed.

Managing loyalty members

Member Maintenance - Example company

Member Name: Xanatos,Xavier
Member Number: 10002199 [2731444304495] * indicates compulsory field

Name Card Control Points Transactions Family Groups External Related Voucher Replacement Surveys Photo

Member Number: 10002199 Address: Referral: None
Prefix: Other Referral:
Title: Dr Suburb: Staff Name:
First Name *: Xavier State: VIC Comments:
Surname *: Xanatos Country: Australia
Suffix: Post Code: 3167
Contact Name:
Home Phone: 0945698725
Work Phone:
Mobile: 0416659785
Fax:
Email Address: XavXan@email.com

Find Card Add / Update

See *Member Maintenance* screen on page 106.

4. Press the Photo tab.

The Photo tab is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
Member Number: 10002199 [2731444304495] * indicates compulsory field

Name Card Control Points Transactions Family Groups External Related Voucher Replacement Surveys Photo

Upload Photo

Find Card Add / Update

5. Press **Upload Photo**.

Your browser's File Chooser window is displayed.

6. Choose the file to upload from your local computer using the File Chooser window.

The new photo is uploaded.

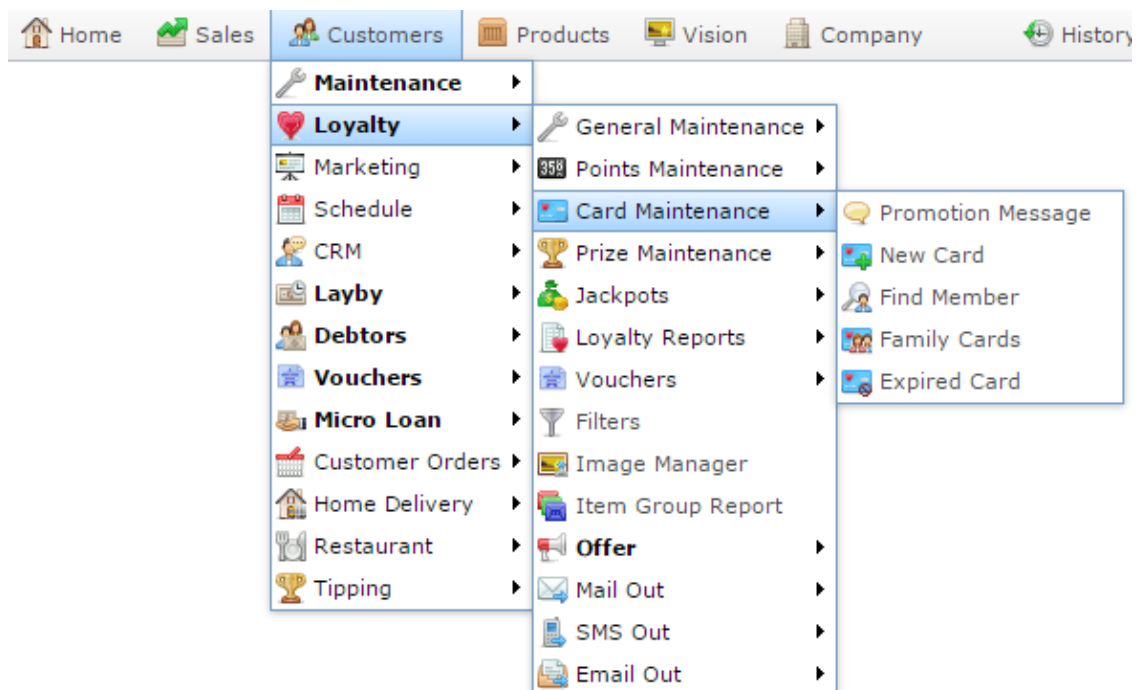
Adding or removing a loyalty member from a family

Loyalty members can share points across a family card. You can add or remove a loyalty member from a family on the Family tab of Member Maintenance.

Note: You must know the card number of the family you want to add or remove the loyalty member from. See *Finding a loyalty member* on page 53.

To add or remove a loyalty member from a family:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member.**



The Find Loyalty screen is displayed.

Find Loyalty

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Name:

Card Number:

Email:

Mobile:

Managing loyalty members

3. Search for the family you want to add the loyalty member to and record the **Card Number**.

See *Finding a loyalty member* on page 53.

4. Search for the loyalty member you want to edit.

The Member Maintenance screen is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
Member Number: 10002199 [2731444304495] * indicates compulsory field

Name Card Control Points Transactions Family Groups External Related Voucher Replacement Surveys Photo

Member Number: 10002199 Address: Referral: None
Prefix: Other Referral:
Title: Dr Suburb: Staff Name:
First Name *: Xavier State: VIC Comments:
Surname *: Xanatos Country: Australia
Suffix: Post Code: 3167
Contact Name:
Home Phone: 0945698725
Work Phone:
Mobile: 0416659785
Fax:
Email Address: XavXan@email.com

Find Card Add / Update

See *Member Maintenance screen* on page 106.

5. Press the Family tab.

The Family tab is displayed.

The screenshot shows a web application window titled "Member Maintenance - Example company". At the top, it displays "Member Name: Xanatos,Xavier" and "Member Number: 10002199 [2731444304495] * indicates compulsory field". Below this is a navigation menu with tabs: Name, Card, Control, Points, Transactions, Family (selected), Groups, External, Related, Voucher, Replacement, Surveys, and Photo. The main content area is titled "Family Card:" and contains a text input field. Below the input field, there is a checked checkbox labeled "Add Points to Family". Underneath the checkbox are two buttons: "Add Card" and "Remove Card". In the center of the main area, the text "Not a Family Member" is displayed in red. At the bottom right of the window, there are two buttons: "Find Card" and "Add / Update".

6. Type the card number you recorded earlier in the **Family Card** field.

7. If you want to:

- Add the loyalty member to this family, press **Add Card**.
- Remove the loyalty member from this family, press **Remove Card**.

8. Press **Add / Update**.

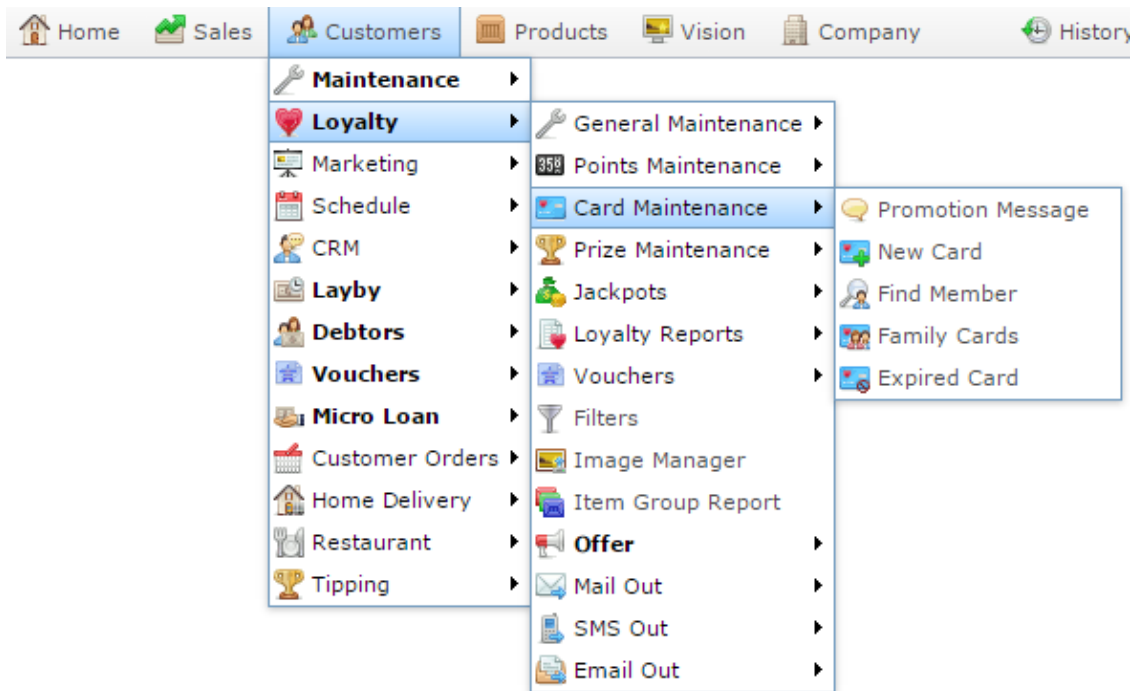
The loyalty member is updated.

Adding a loyalty member to a loyalty group

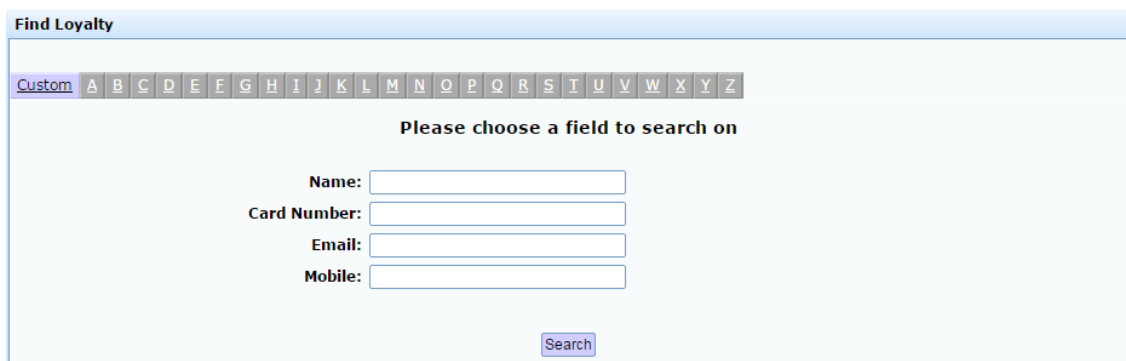
You can add loyalty members to loyalty groups to provide special loyalty rates or promotions, or link their loyalty points to a single card.

To add a loyalty member to a group:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.

A screenshot of the 'Find Loyalty' search screen. At the top, there is a 'Custom' dropdown and a row of letters from A to Z. Below this, the text 'Please choose a field to search on' is displayed. There are four input fields labeled 'Name:', 'Card Number:', 'Email:', and 'Mobile:'. A 'Search' button is located at the bottom right of the form.

3. Search for the loyalty member you want to edit.

See *Finding a loyalty member* on page 53.

The Member Maintenance screen is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Member Number: 10002199 Address: Referral:

Prefix:

Title: Suburb:

First Name *: State: Staff Name:

Surname *: Country: Comments:

Suffix: Post Code:

Contact Name:

Home Phone:

Work Phone:

Mobile:

Fax:

Email Address:

See Member Maintenance screen on page 106.

4. Press the Groups tab.

The Groups tab is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Groups:

Group Id	Group	Command
999	FLC	Remove From Group

5. Find the group you want to remove them from in the group grid.

6. Press **Remove From Group**.

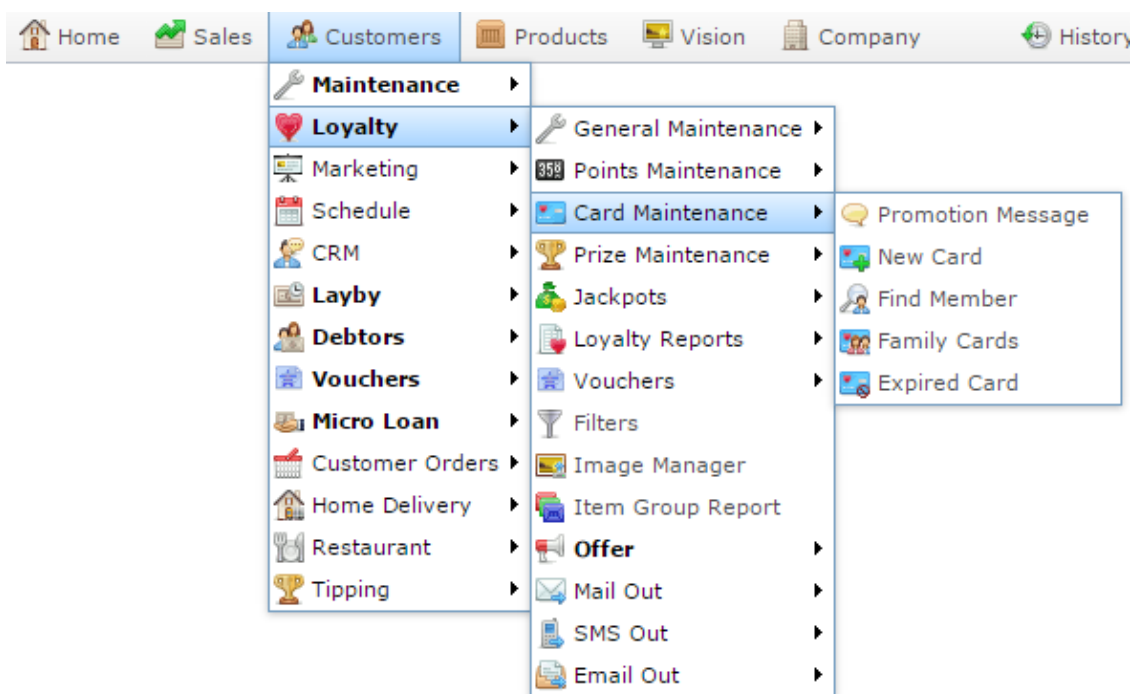
The loyalty member is removed from the loyalty group.

Removing a loyalty member from a loyalty group

Remove a loyalty member from a group if you do not want them to receive the group's loyalty privileges.

To remove a loyalty member from a group:

1. Press  **Customers**.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.

The screenshot shows the 'Find Loyalty' search screen. At the top, there is a 'Custom' dropdown menu and a row of letters from A to Z. Below this, the text 'Please choose a field to search on' is displayed. There are four input fields labeled 'Name:', 'Card Number:', 'Email:', and 'Mobile:'. A 'Search' button is located at the bottom right of the form.

3. Search for the loyalty member you want to edit.

See *Finding a loyalty member* on page 53.

The Member Maintenance screen is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Member Number: 10002199 Address: Referral:

Prefix:

Title: Suburb:

First Name *: State: Staff Name:

Surname *: Country: Comments:

Suffix: Post Code:

Contact Name:

Home Phone:

Work Phone:

Mobile:

Fax:

Email Address:

See Member Maintenance screen on page 106.

4. Press the Groups tab.

The Groups tab is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Groups:

Group Id	Group	Command
999	FLC	Remove From Group

5. Select the group you want to add the loyalty member to in the **Groups** drop-down field.

6. Press .

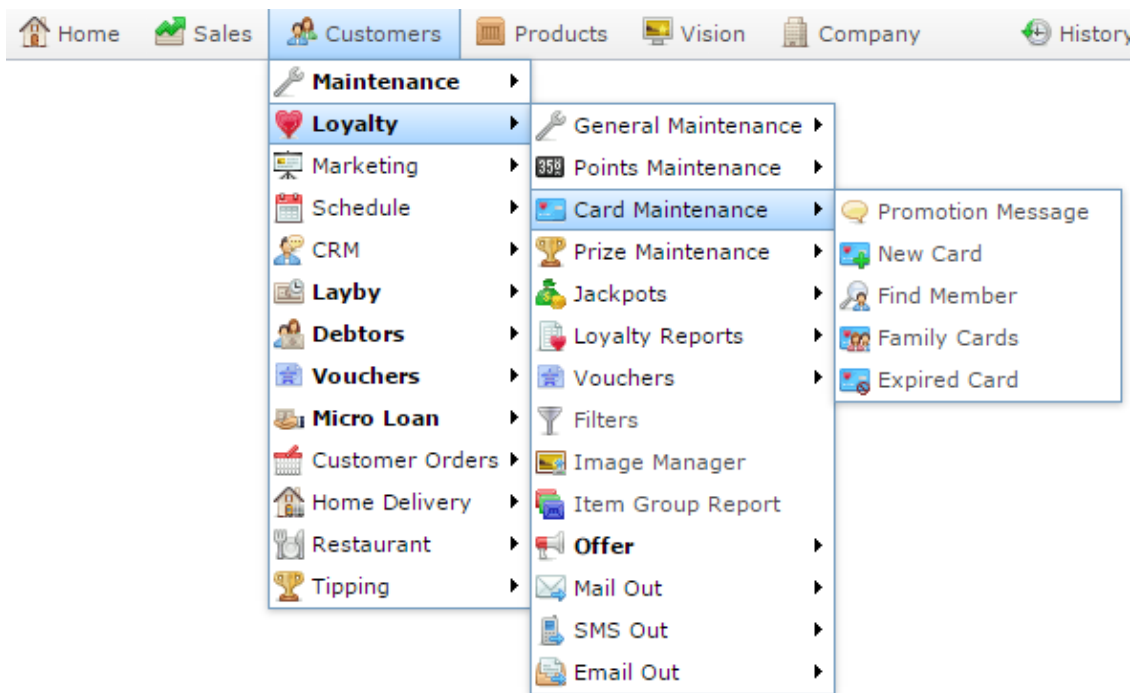
The loyalty member is added to the loyalty group.

Creating a loyalty voucher from loyalty points

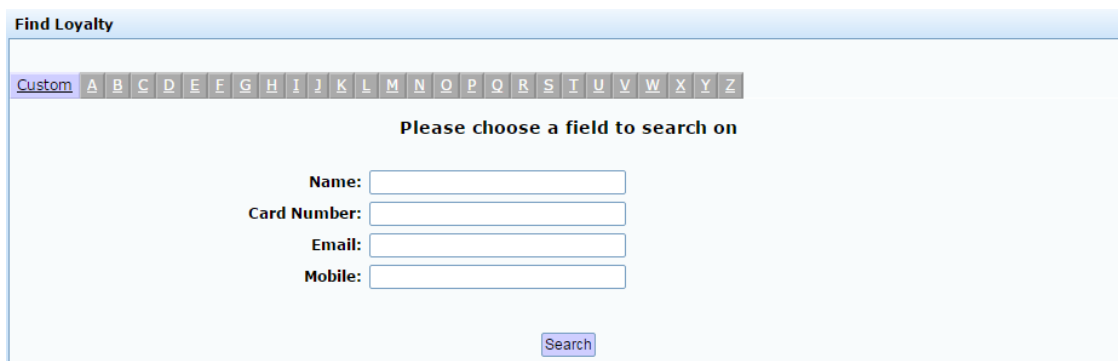
You can convert a loyalty member's loyalty points into a voucher for them to spend at your company.

To create a loyalty voucher from loyalty points:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.

A screenshot of the 'Find Loyalty' search screen. At the top, there is a 'Custom' dropdown menu followed by a row of buttons labeled with letters A through Z. Below this, the text 'Please choose a field to search on' is centered. There are four input fields: 'Name:', 'Card Number:', 'Email:', and 'Mobile:'. Each field has a corresponding text input box. At the bottom center, there is a 'Search' button.

3. Search for the loyalty member by name.

See *Finding a loyalty member* on page 53.

The Member Maintenance screen is displayed.

See *Member Maintenance* screen on page 106.

4. Press the **Voucher** tab.

The **Voucher** tab is displayed.

5. Type the unique code to identify the voucher in the **Voucher** field.
6. Type the number of loyalty points to subtract from the loyalty member's account in the **Points** field.

Note: This does not have to correlate to their normal points redemption amount.

7. Type the dollar value of the voucher in the **Amount** field.
8. Press **Convert To Voucher**.

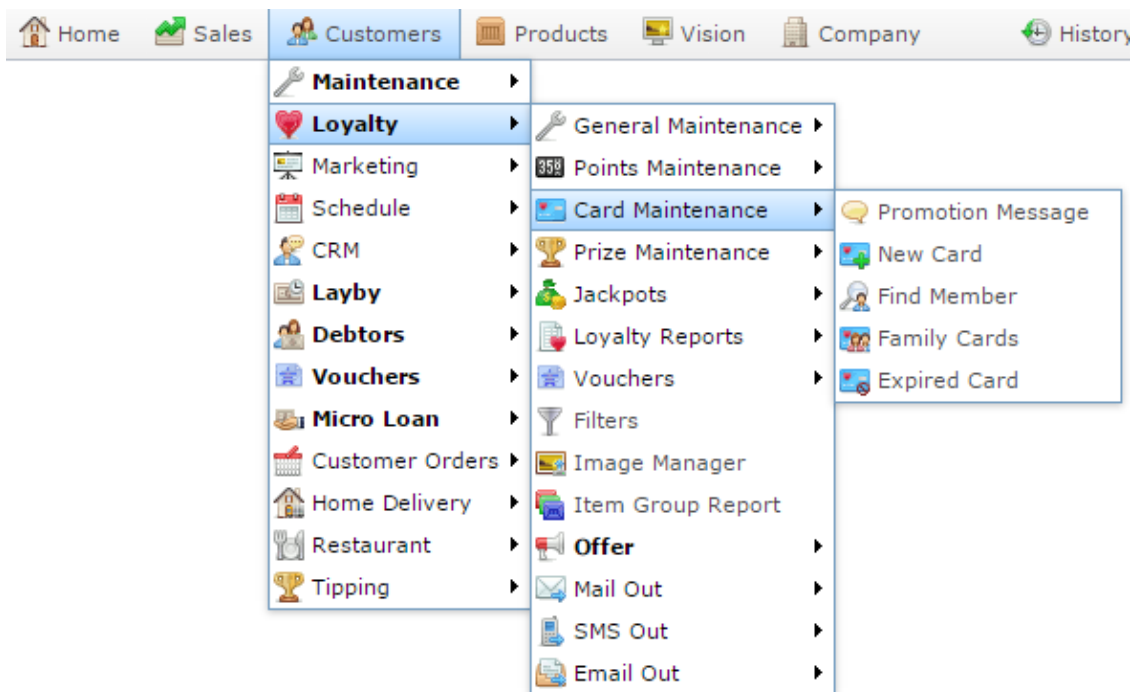
The voucher is created.

Replacing a lost or damaged card

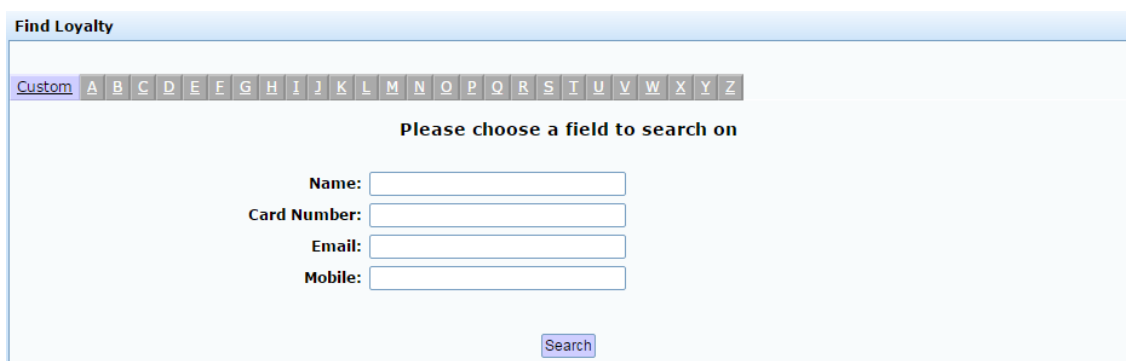
You can replace a loyalty member's lost or damaged card individually.

To replace a lost or damaged card:

1. Press  **Customers**.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.



The screenshot shows the 'Find Loyalty' search screen. It features a search bar with a 'Custom' dropdown and a grid of letters A through Z. Below the search bar, there is a prompt: 'Please choose a field to search on'. There are four input fields labeled 'Name:', 'Card Number:', 'Email:', and 'Mobile:'. A 'Search' button is located at the bottom right of the form.

3. Search for the loyalty member by name.

See *Finding a loyalty member* on page 53.

The Member Maintenance screen is displayed.

See *Member Maintenance* screen on page 106.

4. Press the Replacement tab.

The Replacement tab is displayed.

5. Type the unique code to identify the new card in the **Replacement** field.
6. Select whether you are replacing a **Lost Card** or a **Broken Card**.
7. Add any additional information needed in the **Comment** field.
8. Press **Replace Card**.

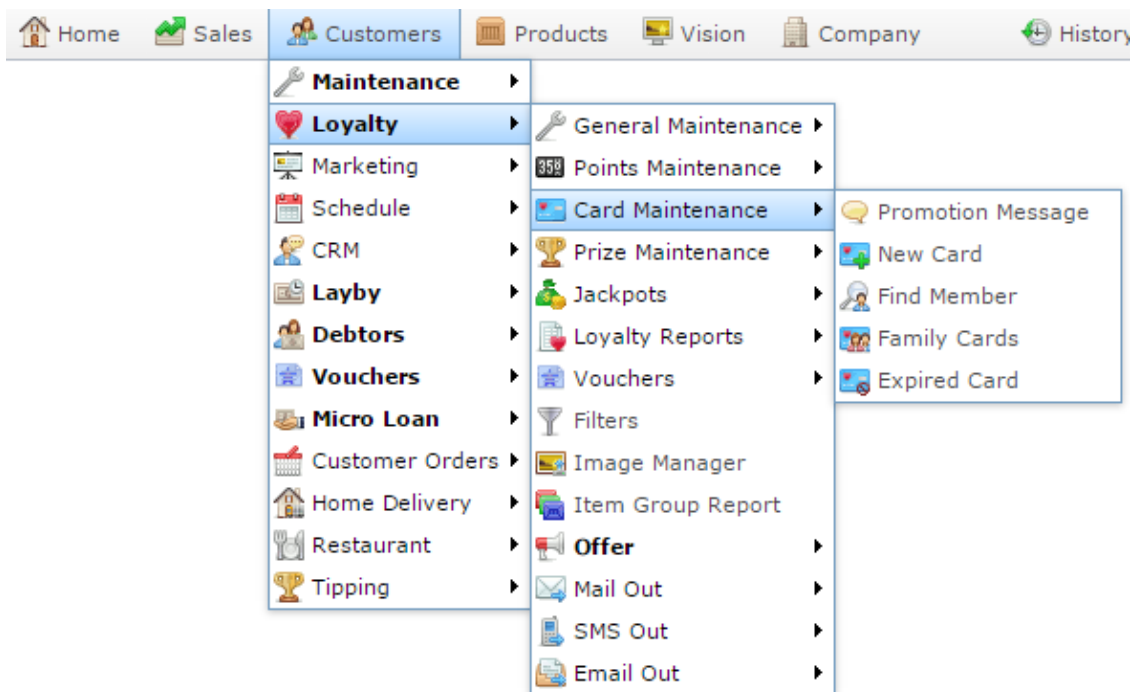
The card is replaced.

Deactivating a loyalty member

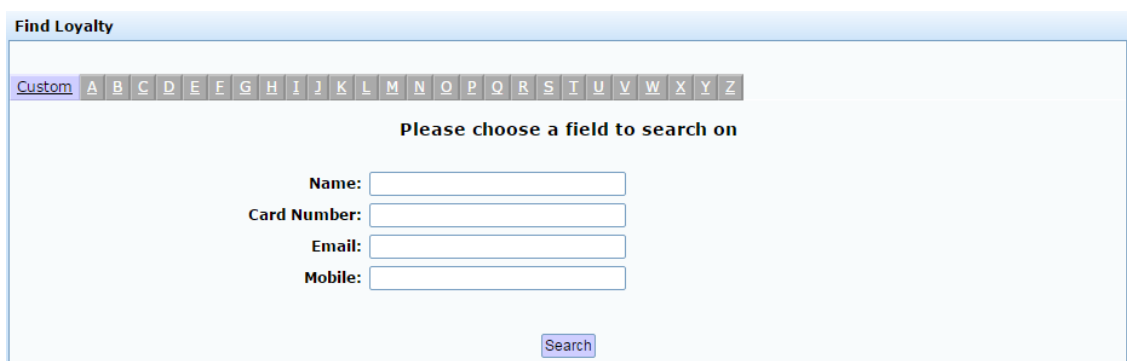
If a loyalty member is no longer active at your company, you can make their card inactive.

To deactivate a loyalty member:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.

A screenshot of the 'Find Loyalty' search screen. At the top, there is a 'Custom' dropdown menu followed by a row of letters from A to Z. Below this, the text 'Please choose a field to search on' is displayed. There are four input fields labeled 'Name:', 'Card Number:', 'Email:', and 'Mobile:'. A 'Search' button is located at the bottom right of the form.

3. Search for the loyalty member by name.

See *Finding a loyalty member* on page 53.

The Member Maintenance screen is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Member Number: 10002199 Address: Referral:

Prefix: Other Referral:

Title: Suburb: Staff Name:

First Name *: State: Comments:

Surname *: Country:

Suffix: Post Code:

Contact Name:

Home Phone:

Work Phone:

Mobile:

Fax:

Email Address:

See Member Maintenance screen on page 106.

4. Press the Card tab.

The Card tab is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Card Number: 2731444304495 PIN:

Join Date: 6/10/2015 Occupation:

Expiry Date: Reference:

Card Type: Source Site:

Points Rule - Follow Card:

Card Active:

Gender:

Date of Birth:

Description:

5. Select **False** in the **Card Active** drop-down field.

Managing loyalty members

Member Maintenance - Example company

Member Name: Xanatos,Xavier
Member Number: 10002199 [2731444304495] * indicates compulsory field

Name **Card** Control Points Transactions Family Groups External Related Voucher Replacement Surveys Photo

Card Number	2731444304495	PIN :	<input type="text"/>
Join Date :	6/10/2015	Occupation:	<input type="text"/>
Expiry Date :	6/10/2016	Reference :	<input type="text"/>
Card Type:	Default	Source Site :	Chadstone
Points Rule - Follow Card :	False		
Card Active :	True		
Gender:	Please Select		
Date of Birth:	1/01/1900		
Description :	<input type="text"/>		

Find Card Add / Update

6. Press **Add / Update**.

The loyalty member is deactivated.

Deleting a loyalty member


You cannot delete a loyalty member once created. If you want a loyalty member to no longer be listed for your company, you can make their card inactive. See *Deactivating a loyalty member* on page 82.

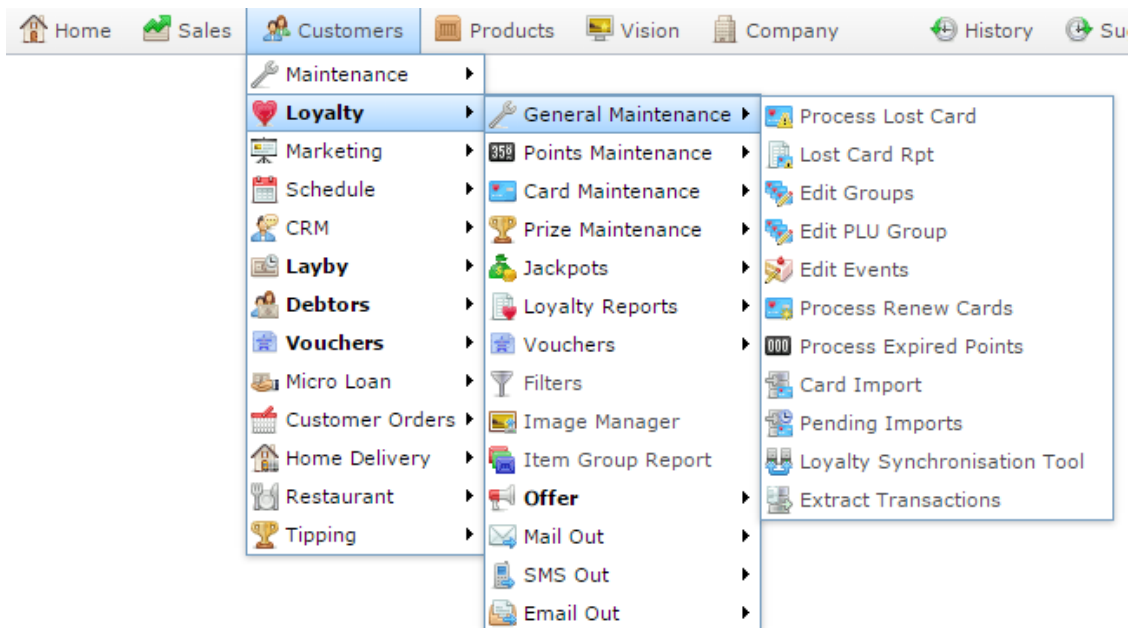
Importing loyalty cards

Import loyalty cards if you have a large number of cards you need to create in the Portal.

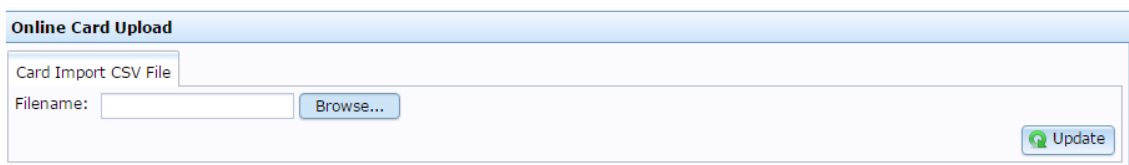
Note: You can view the progress of current imports using the Pending Imports report. See *Import Pending Upload report* on page 88.

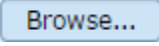
To import loyalty cards:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Card Import**.



The Online Card Upload screen is displayed.



3. Press  .

The browser's Open file window is displayed.

4. Navigate to the file you want to upload.

5. Press  .

The file name is displayed in the **Filename** field.

6. Press .


The Portal imports the file.

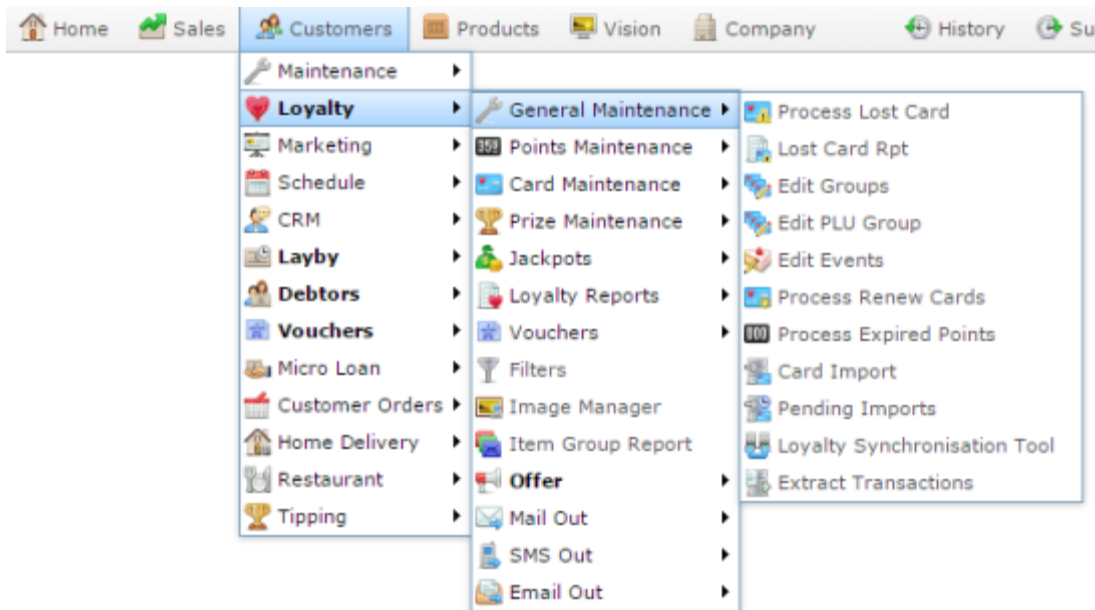
Import Pending Upload report

Use the Import Pending Upload report to view the progress of loyalty card imports.

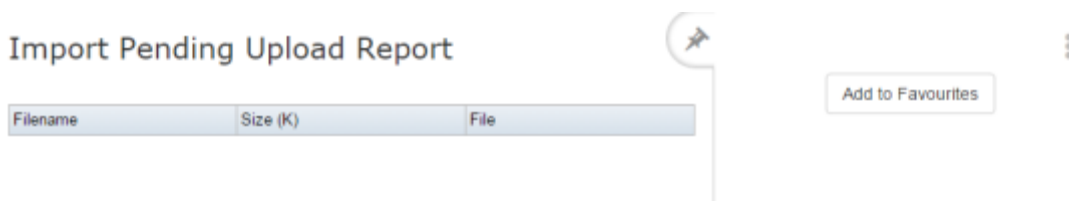
Opening the Pending Imports report

To open the Import Pending Upload report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Pending Imports**.



The Pending Imports report is displayed.



Import Pending Uploads report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Filename	Name of the file being uploaded. Note: Press to delete or process the file immediately.
Size (K)	Size in kilobytes of the file being uploaded.
File	Name of the file.

Preparing a loyalty CSV file for import

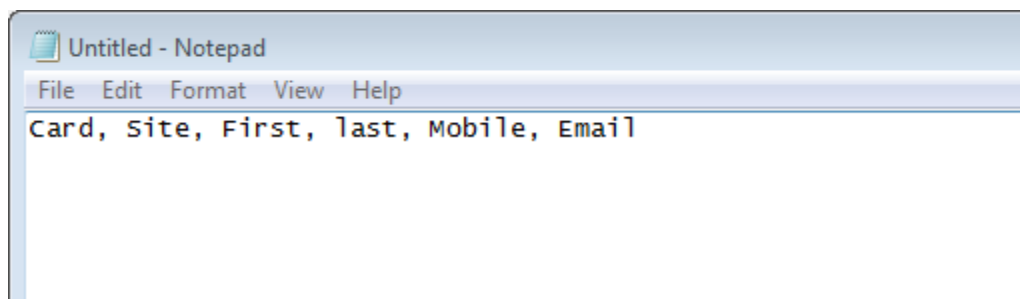
You can import loyalty member information into the Portal using a Comma Separated Value (CSV) file.

Note: All dates must be written as YYYY-MM-DD. For example, July 12th 1989 is represented as 1984-07-12.

To prepare an import file:

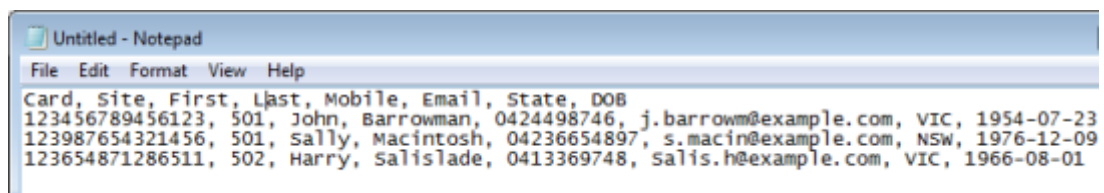
1. Create a text file.
2. At the top of the file, add the following fields, separated by a comma: Card, Site, First, last, Mobile, Email.

Tip: You can use a space in addition to the comma if you want the file to be easier to read, as in the example shown.



Note: These fields are compulsory. Each loyalty member record you want to import must have a value for each field.

3. Add any of the other fields you want to add from the table below.
4. Add the loyalty member record values in the same order as the fields, each record on a new line.



5. Save the text file.

The file is ready for import.

CSV Field	Description
Card	The loyalty card number. Note: This field is compulsory.
Site	The loyalty member's home site. Note: This field is compulsory.
First	The loyalty member's first name. Note: This field is compulsory.
Last	The loyalty member's last name. Note: This field is compulsory.
Mobile	The loyalty member's mobile number. Note: This field is compulsory.
Email	The loyalty member's email address. Note: This field is compulsory.
Address1	The loyalty member's address.
Address2	Additional lines for the loyalty member's address,

CSV Field	Description
Suburb	The loyalty member's suburb.
State	The loyalty member's state.
Country	The loyalty member's country.
Postcode	The loyalty member's postcode.
DOB	The loyalty member's date of birth.
Gender	The loyalty member's gender.
Title	The loyalty member's preferred salutation. For example, Mr, Dr.
Phone	The loyalty member's phone number.
Fax	The loyalty member's fax number.
Type	The card type to add the loyalty member as. Note: Ensure the name of the card type is typed correctly.
Group	A loyalty group to add the loyalty member to. Note: Ensure the name of the group is typed correctly.


CSV Field	Description
Group 1	Another loyalty group to add the loyalty member to. Note: Ensure the name of the group is typed correctly.
Group 2	Another loyalty group to add the loyalty member to. Note: Ensure the name of the group is typed correctly.
Group 3	Another loyalty group to add the loyalty member to. Note: Ensure the name of the group is typed correctly.
Group 4	Another loyalty group to add the loyalty member to. Note: Ensure the name of the group is typed correctly.
Group 5	Another loyalty group to add the loyalty member to. Note: Ensure the name of the group is typed correctly.
Group 6	Another loyalty group to add the loyalty member to. Note: Ensure the name of the group is typed correctly.
OptOutMail	Type Yes if the loyalty member has opted out of receiving mail outs.
OptOutEmail	Type Yes if the loyalty member has opted out of receiving email mail outs.

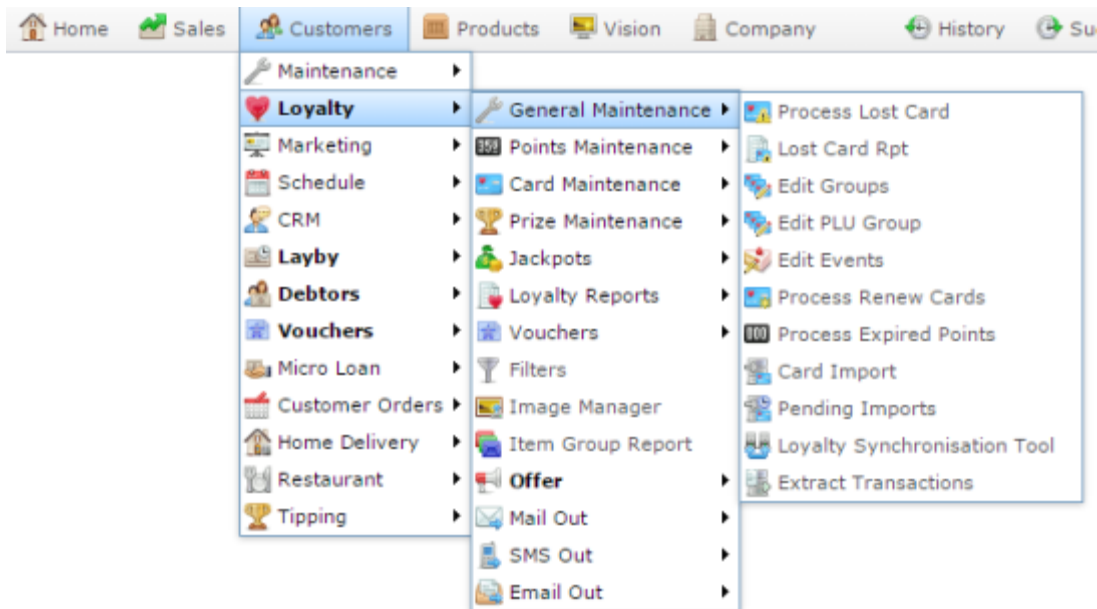
CSV Field	Description
OptOutSMS	Type Yes if the loyalty member has opted out of receiving SMS mail outs.
ID	The loyalty member's customer ID number.
SignUpDate	Date the loyalty member signed up.
Points	The loyalty member's loyalty points balance.
Completed	Type Yes if the loyalty card is complete.
PointsOnly	Type Yes to update the card's points without changing any other details.
GroupOnly	Type Yes to update the card's group memberships without changing any other details.
ExpiryDate	Date the loyalty membership expires.
LastTranDate	Date of the loyalty member's last transaction.

Synchronising loyalty information

Synchronise loyalty information to ensure your customer information is up to date with any external sites that do not support real-time updates.

To synchronise your loyalty information:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Loyalty Synchronisation Tool**.



The Portal processes the loyalty synchronisation.

Discovered 460 Loyalty Customers with matching Marketing email address and/or mobile number

.....
.....
.....
.....
.....

Updated a total of 0 Cards in the Marketing database from the Loyalty database

Synchronisation Complete

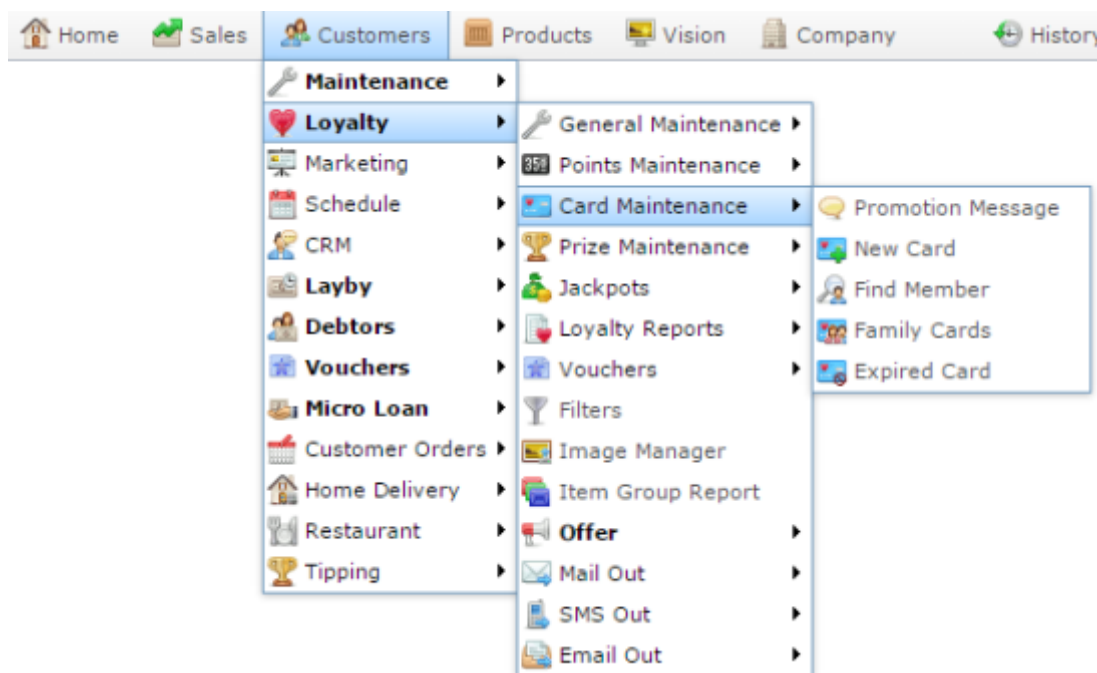
Loyalty Expired Cards report

Use the Loyalty Expired Cards report to view loyalty cards that have expired.

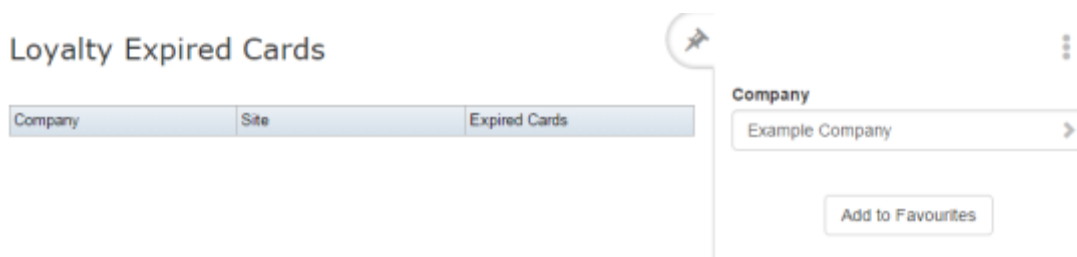
Opening the Loyalty Expired Cards report

To open the Loyalty Expired Cards report:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Expired Card.**



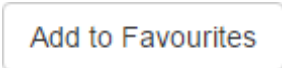
The Loyalty Expired Cards report is displayed.



Loyalty Expired Cards report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Company	Select the company to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Company	The name of the company with expired cards.
Site	The site the expired cards are linked to.
Expired Cards	The number of expired cards at this site and company.

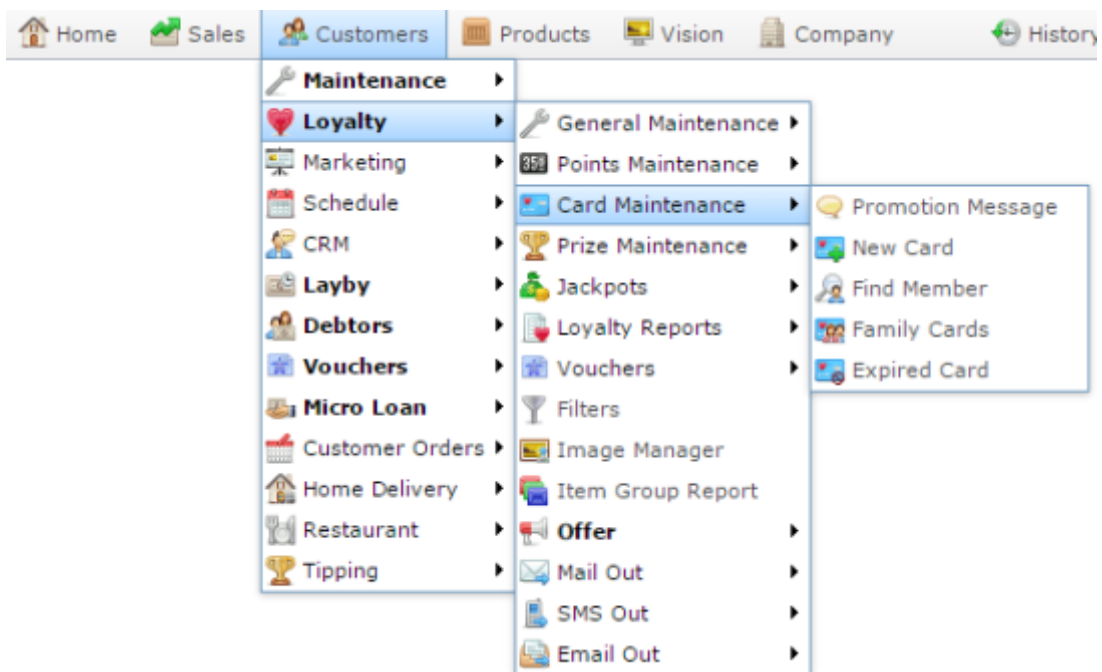
Loyalty Family Cards report

Use the Loyalty Family Cards report to view loyalty cards that are linked to family members.

Opening the Loyalty Family Cards report

To open the Loyalty Family Cards report:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Family Cards**.




The Loyalty Family Cards report is displayed.



Loyalty Family Cards report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Company	Select the company to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.


Field	Description
Name	Name of the loyalty member who owns the master loyalty card for this family.
Master Card	Card number of the master loyalty card for this family.
Family Members	Name of the loyalty members who are a member of this family.

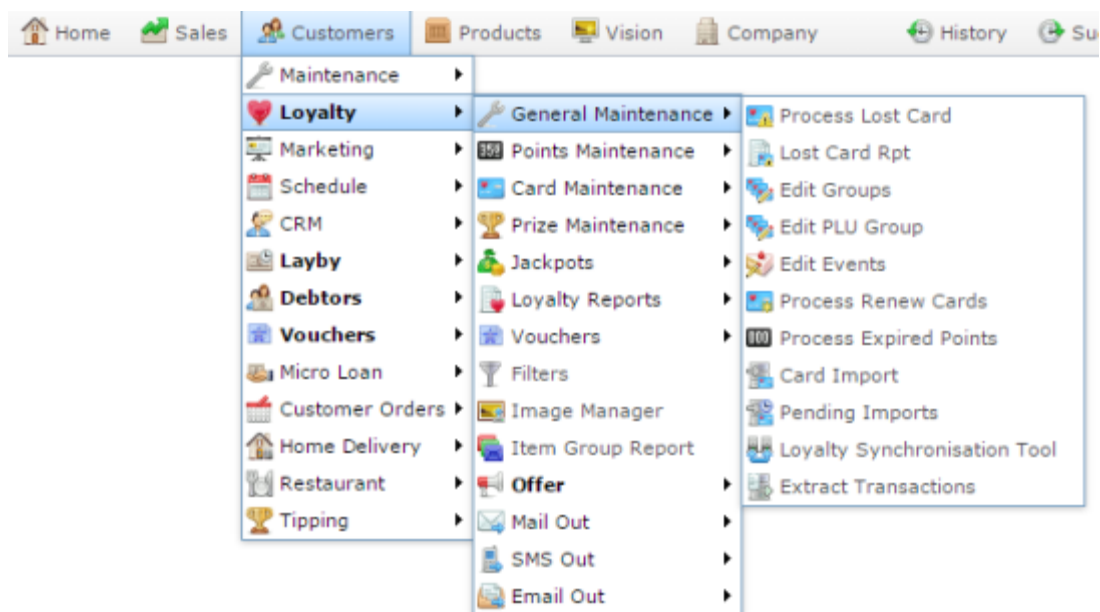
Process Lost Cards Report

Use the Lost Cards report to view and process lost loyalty cards.

Opening the Lost Cards report

To open the Lost Cards report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Process Lost Card**.



The Lost Cards report is displayed.

Loyalty Update Maintenance - Pending Lost Cards Add to Favourites

Company	Company #	Number Of Records
AMC	-1	2
Total		2

Lost Cards report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Field	Description
Company	Name of the company the lost cards belong to.
Company #	Unique code identifying the company.
Number of Records	Number of reported lost cards.

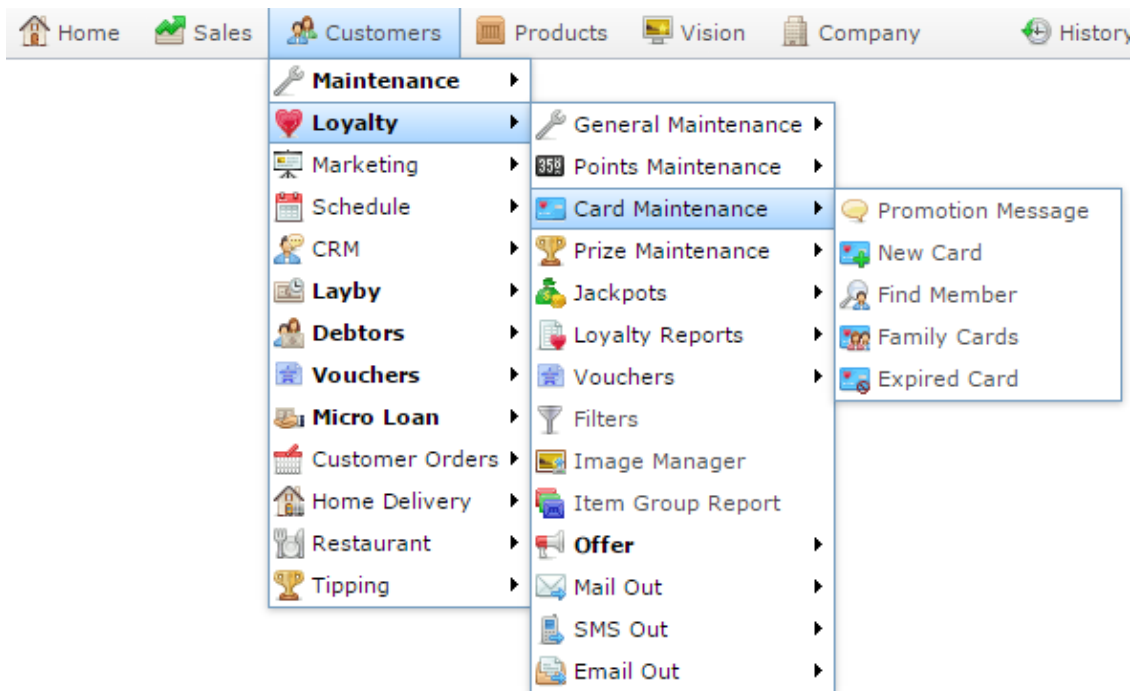
Member Maintenance screen

Use the Member Maintenance screen to view and maintain details about the loyalty member.

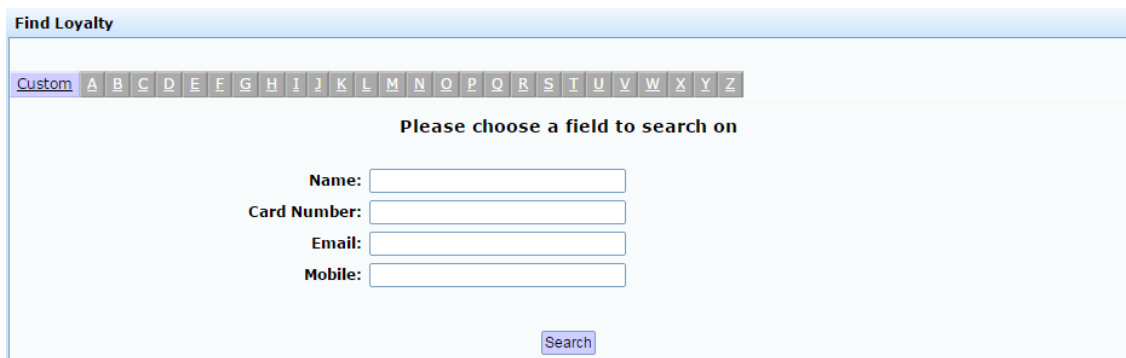
Opening the Member Maintenance screen

To open the Member Maintenance screen:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member.**



The Find Loyalty screen is displayed.



The screenshot shows the 'Find Loyalty' search screen. At the top, there is a 'Custom' dropdown menu and a row of letters from A to Z. Below this, the text 'Please choose a field to search on' is displayed. There are four input fields labeled 'Name:', 'Card Number:', 'Email:', and 'Mobile:'. A 'Search' button is located at the bottom right of the form.

3. Search for the loyalty member by name.

See *Finding a loyalty member* on page 53.

The Member Maintenance screen is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
Member Number: 10002199 [2731444304495] * indicates compulsory field

Name Card Control Points Transactions Family Groups External Related Voucher Replacement Surveys Photo

Member Number: 10002199 Address: Referral:

Prefix:

Title: Suburb: Other Referral:

First Name *: State: Staff Name:

Surname *: Country: Comments:

Suffix: Post Code:

Contact Name:

Home Phone:

Work Phone:

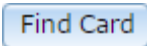
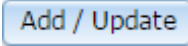
Mobile:

Fax:

Email Address:

Member Maintenance screen key fields and buttons

Common fields and buttons

Field	Description
Member Name	The name of the selected loyalty member.
Member Number	The card number identifying the loyalty member.
	Type a card number into the adjacent field and press to find this card.
	Press to save any changes you have made to the loyalty member.

Name tab

Use this tab to define the loyalty member's name and contact details.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Member Number: 10002199 Address: Referral: None

Prefix: Other Referral: Staff Name: Comments:

Title: Dr Suburb: State: VIC Country: Australia

First Name *: Xavier Post Code: 3167

Surname *: Xanatos

Suffix: Contact Name: Home Phone: 0945698725

Work Phone: Mobile: 0416659785

Fax: Email Address: XavXan@email.com

Find Card Add / Update

Field	Description
Member Number	Unique code identifying the loyalty member.
Prefix	Any prefix to be added before the loyalty member's name.
Title	The preferred title of the loyalty member. For example, Ms, or Dr.
First Name	The loyalty member's first name.
Surname	The loyalty member's last name.

Field	Description
Suffix	Any suffix to be added after the loyalty member's name.
Contact Name	Name of the person to contact regarding this loyalty member.
Home Phone	Home phone number of the loyalty member.
Work Phone	Work phone number of the loyalty member.
Mobile	Mobile phone number of the loyalty member.
Fax	Fax number of the loyalty member.
Email Address	Email address of the loyalty member.
Address	Postal address of the loyalty member.
Suburb	Suburb the loyalty member lives in.
State	State the loyalty member lives in.
Country	Country the loyalty member lives in.
Post Code	Post code of the loyalty member's address.
Referral	Select the method by which the loyalty member discovered your company.

Field	Description
Other Referral	Type the method by which the loyalty member discovered your company, if it is not listed in the Referral drop-down field.
Staff Name	Name of the staff member who created the loyalty member's account.
Comments	Any comments regarding the loyalty member's account.
Cap 1	Type any additional information you want to store in this field. <div data-bbox="520 934 1326 1043" style="border: 1px solid #0056b3; background-color: #d9e1f2; padding: 5px;"> <p>Note: You can rename this field using the Capture Label A configuration setting in the Loyalty area of Company Options. See <i>Configuring your company for loyalty</i> on page 14.</p> </div>
Cap 2	Type any additional information you want to store in this field. <div data-bbox="520 1225 1326 1335" style="border: 1px solid #0056b3; background-color: #d9e1f2; padding: 5px;"> <p>Note: You can rename this field using the Capture Label B configuration setting in the Loyalty area of Company Options. See <i>Configuring your company for loyalty</i> on page 14.</p> </div>
Trade	Type the loyalty member's trade or profession in this field.
Soft Label 2-10	You can configure these fields to store custom information about your loyalty members. See <i>Configuring your company for loyalty</i> on page 14. <div data-bbox="520 1718 1326 1827" style="border: 1px solid #0056b3; background-color: #d9e1f2; padding: 5px;"> <p>Note: You can rename this field using the Capture Label 1-9 configuration settings in the Loyalty area of Company Options. See <i>Configuring your company for loyalty</i> on page 14.</p> </div>

Card tab

Use this area to define the loyalty card type, PIN and expiry date, and record further details about the loyalty member such as their date of birth and occupation.

Member Maintenance - Example company

Member Name: Xanatos,Xavier

Member Number: 10002199 [2731444304495] * indicates compulsory field

Card Number: 2731444304495 PIN :

Join Date : 6/10/2015 Occupation:

Expiry Date : 6/10/2016 Reference :

Card Type: Default Source Site : Chadstone

Points Rule - Follow Card : False

Card Active : True

Gender: Please Select

Date of Birth: 1/01/1900

Description :

Field	Description
Card Number	Unique number identifying the loyalty member.
Join Date	Date the customer became a loyalty member.
Expiry Date	Date the loyalty card expires.
Card Type	Select the type of loyalty card the customer has.
Points Rule - Follow Card	Select True if the loyalty member should accrue points according to the card type rules. Select False to override the card type rules.

Field	Description
Card Active	Select True to enable the loyalty member to accrue and utilise loyalty rewards such as points and jackpots.
Gender	Select the loyalty member's gender.
Date of Birth	Select the loyalty member's date of birth.
Description	Type any additional information you want to store in this field.
PIN	Type the PIN the loyalty member uses to access the card. For example, when redeeming points.
Occupation	Type the loyalty member's occupation.
	<p>Note: The name of this field is controlled by the Capture Occupation configuration setting in the Loyalty area of Company Options. See <i>Configuring your company for loyalty</i> on page 14.</p>
Reference	Type the means by which the loyalty member discovered your organisation.
Source Site	Select the site the loyalty member originally joined your loyalty program from.

Control tab

Use this area to define how mail outs, SMS mail-outs and jackpots apply to this loyalty member.

Member Maintenance - Example company

Member Name: Xanatos, Xavier

Member Number: 10002199 [2731444304495] * indicates compulsory field

Jackpot:

Mail:

Email:

Email Confirmation:

Email Opt In:

SMS:

Purged:

Field	Description
Jackpot	Select if the loyalty member can receive jackpots.
Mail	Select if the loyalty member can receive printed mail outs.
Email	Select if the loyalty member can receive emailed mail outs.
Email Confirmation	Indicates whether a confirmation email was sent to this loyalty member to permit marketing materials, in accordance with the laws of some countries.
<p>Note: This field is for reference only, and cannot be used to send a confirmation email.</p>	

Email Opt In

Indicates whether an email requiring an opt-in was sent to this loyalty member to permit marketing materials, in accordance with the laws of some countries.

Note: This field is for reference only, and cannot be used to send an opt-in email.

SMS

Select if the loyalty member can receive SMS advertising.

Purged

Select if this card is no longer in use and should not be marketed to.

Points tab

Use this area to define discounts, points earned and redeemed per dollar, and view an overview of sales, points and jackpots for this loyalty member.

Member Maintenance - Example company

Member Name: Xanatos,Xavier

Member Number: 10002199 [2731444304495] * indicates compulsory field

Name	Card	Control	Points	Transactions	Family	Groups	External	Related	Voucher	Replacement	Surveys	Photo
------	------	---------	--------	--------------	--------	--------	----------	---------	---------	-------------	---------	-------

Sales to Date : 0

Sales To Year : 0

Date of Last Sale : No Transactions

Points Earned : 0

Points Redeemed : 0

Jackpot : 0

Expired : 0

Points Balance : 0

Points per \$:

Redeem Points per \$:

Discount %:

Field

Description

Sales to Date Total value of all sales by this loyalty member.

Sales to Year Total value of all sales by this loyalty member during the financial year as defined by your company options.

Date of Last Sale Date the last transaction occurred.

Points Earned Total points earned by this loyalty member.

Points Redeemed Total points redeemed by this loyalty member.

Jackpot Total jackpots received by this loyalty member.

Expired Total points this loyalty member has received that have since expired.

Points Balance Current total of un-expired points.

Points per \$ Number of loyalty points received per dollar spent.

Redeem Points per \$ Number of points redeemed per dollar.

Discount % Discount percentage received by this loyalty member.

Transactions tab

Use this tab to view an overview of transactions by this loyalty member, including jackpots and points expiries.

Member Maintenance - Example company

Member Name: Xanatos,Xavier

Member Number: 10002199 [2731444304495] * indicates compulsory field

Site	Date	Journal	Sales	Discount	Points	Bonus	Redeem	Jackpot	Expired Poi	Total Points

Field	Description
Site	The site the transaction occurred at.
Date	Date the transaction occurred.
Journal	Unique journal code identifying the transaction.
Sales	Total sales amount of the transaction.
Discount	Discount received for this transaction.
Points	Points accumulated by this transaction.
Bonus	Bonus points received for this transaction.
Redeem	Points redeemed in this transaction.
Jackpot	Jackpot amounts received.

Expired Points Points expired on this date.

Total Points Running total of non-expired points when this transaction occurred.

Family tab

Use this tab to join this loyalty member's card to a family.

Member Maintenance - Example company

Member Name: Xanatos, Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Name Card Control Points Transactions **Family** Groups External Related Voucher Replacement Surveys Photo

Family Card:

Add Points to Family

Not a Family Member

Field

Description

Family Card Type the card number of the family card you want to add the loyalty member to.

Add Points to Family Select whether to add the loyalty member's points to the family pool of points.

Press to add the loyalty member to the selected family card.

Remove Card

Press to remove the loyalty member from the selected family card.

Groups tab

Use this tab to add or remove the loyalty member from loyalty groups.

Field

Description

Groups

Select a group to add the loyalty member to.

Add To Group

Press to add the loyalty member to the selected group.

Group ID

Unique code identifying the group the loyalty member belongs to.

Group

Name of the group the loyalty member belongs to.

Command

Press to remove the loyalty member from this group.

External tab

Use this area to view external transactions from non-Point of Sale systems that have earned points for this loyalty member. The Portal uses the card numbers to map points earned to loyalty members.

Note: All information in the fields are supplied by the external system.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

External	Site	Linked Card	Member	Points	Bonus	Redeem	Total	Last Transac	Command

Field	Description
External	The name of the organisation or system the transaction occurred at.
Site	The site code of the organisation the transactions occurred at.
Linked Card	The external loyalty card number this transaction occurred on.
Member	The name of the loyalty member at this organisation.
Points	The number of points accrued by transaction at this organisation.
Bonus	The number of bonus points accrued by transactions at this organisation.
Redeem	The number of points redeemed during transactions at this organisation.

Total The total dollar amount spent during transactions at this organisation.

Last Transaction The date of the last transaction at this organisation.

Command The reason for the change in points, as supplied by the external transaction. For example, Visit Points.

Related tab

Use this tab to view how loyalty members are related.

Field

Description

Relationship The relationship between the two loyalty members.

ID The unique code identifying the related loyalty member.

Card The card number of the related loyalty member. For example, a sponsor.

First Name The first name of the related loyalty member.

Last Name The last name of the related loyalty member.

Command Description of the transaction that updated the relationship.

Voucher tab

Use this tab to convert loyalty points into a loyalty voucher for this loyalty member.

Member Maintenance - Example company

Member Name: Xanatos, Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Voucher:
 Points:
 Amount:

Field

Description

Voucher Type a unique code to identify the voucher.

Points Type the number of points to redeem from the loyalty member's balance when creating the voucher.

Note: This does not have to relate to the number of points usually redeemed per dollar for this loyalty member or card type.

Amount Type the dollar value of the voucher.

Press to create a voucher from the loyalty member's points.

Replacement tab

Use this tab to process lost and damaged card replacements for this loyalty member.

Member Maintenance - Example company

Member Name: Xanatos, Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Replacement:

Lost Card
 Broken Card

Comment:

Field	Description
Replacement	Type the new card number.
Lost Card	Select if you are replacing a card that has been lost.
Broken Card	Select if you are replacing a card that has been damaged.
Comment	Add any comment about the replacement.
<input type="button" value="Replace Card"/>	Press to replace the card.

Surveys tab

Use this tab to view surveys available to loyalty members. You can click on a survey description to:

- View the completed answers if the loyalty member has taken the survey.
- Complete the survey if the loyalty member has not yet taken the survey.

Managing loyalty members

Member Maintenance - Example company

Member Name: Xanatos,Xavier

Member Number: 10002199 [2731444304495] * indicates compulsory field

Name Card Control Points Transactions Family Groups External Related Voucher Replacement Surveys Photo

Description	Survey #	Date	Questions
Bob Test Survey	2	08-Sep-2009	8
Clives Survey	25	11-May-2014	1
First Survey	1	02-Jun-2008	3
Gregs Test	3	02-Jun-2008	3
Poste Code	6	10-Oct-2008	1

Find Card Add / Update

Field

Description

Description

Description of the survey.

Survey

Unique code identifying the survey.

Date

Date the survey was held.

Questions

Number of questions in the survey.

Photo tab

Use this tab to upload a customer photo for your records.

Member Maintenance - Example company

Member Name: Xanatos,Xavier

Member Number: 10002199 [2731444304495] * indicates compulsory field

Name Card Control Points Transactions Family Groups External Related Voucher Replacement Surveys Photo

Upload Photo

Find Card Add / Update

Field

Description

Upload Photo

Press to upload a new photo of the loyalty member from your computer.


Online Card Import screen

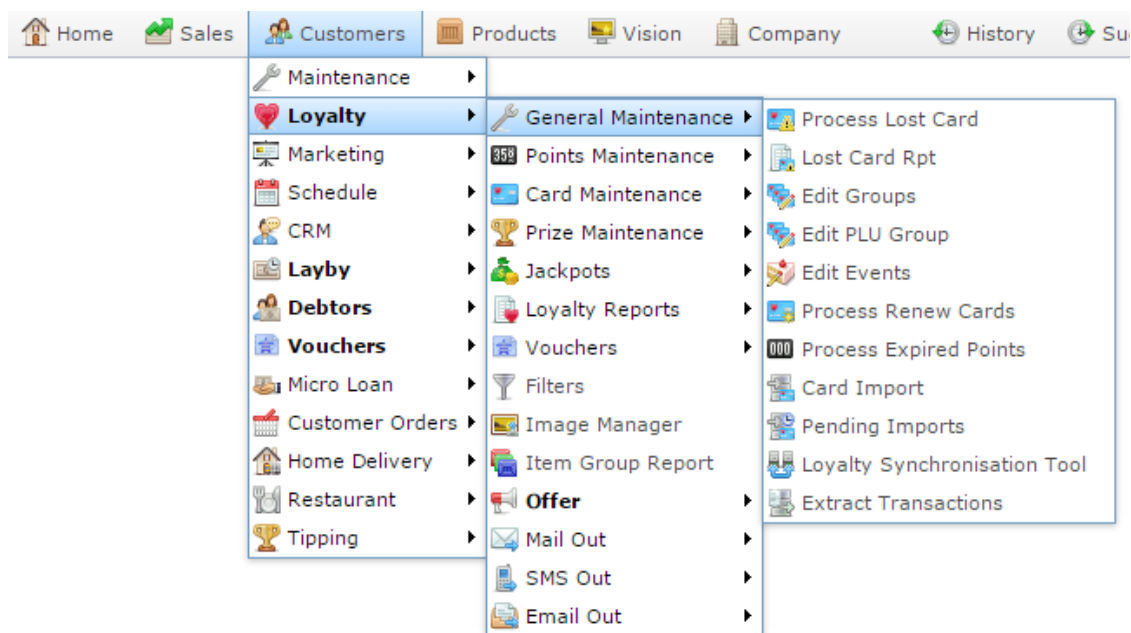
Use this window to import a file with loyalty member card information into the Portal.

See *Importing loyalty cards* on page 86

Opening the Online Card Import screen

To open the Online Card Import screen:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Card Import**.

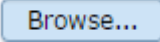
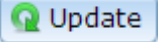


The Online Card Import screen is displayed.

The screenshot shows the 'Online Card Upload' screen. It features a text input field labeled 'Card Import CSV File' with the placeholder text 'Filename:'. To the right of the input field is a 'Browse...' button. At the bottom right of the screen is an 'Update' button with a refresh icon.

Online Card Import screen key fields and buttons

Field	Description
Filename	The name of the file to import.

Field	Description
	Press to open the browser file chooser and find your import file.
	Import the selected file.

Managing card types

You can create card types to control how a loyalty membership works.

Also see:

- *Card Type report* on page 174.
- *Loyalty Card Type Maintenance screen* on page 162.

What you can do:

- *Creating a new loyalty card type* on page 129.
- *Creating a discount loyalty card type* on page 132.
- *Creating a loyalty card type that expires* on page 135.
- *Creating a loyalty card type with transaction limits* on page 139.
- *Creating a loyalty card type to accrue or redeem loyalty points* on page 142.
- *Creating a loyalty card type to accrue or redeem loyalty points* on page 146.
- *Creating a loyalty card type for prizes and jackpots* on page 149.
- *Creating a loyalty card type with renewal rules* on page 151.
- *Creating a loyalty card upgrade path* on page 154.
- *Editing a loyalty card type* on page 158.
- *Deleting a loyalty card type* on page 160.

Creating a new loyalty card type

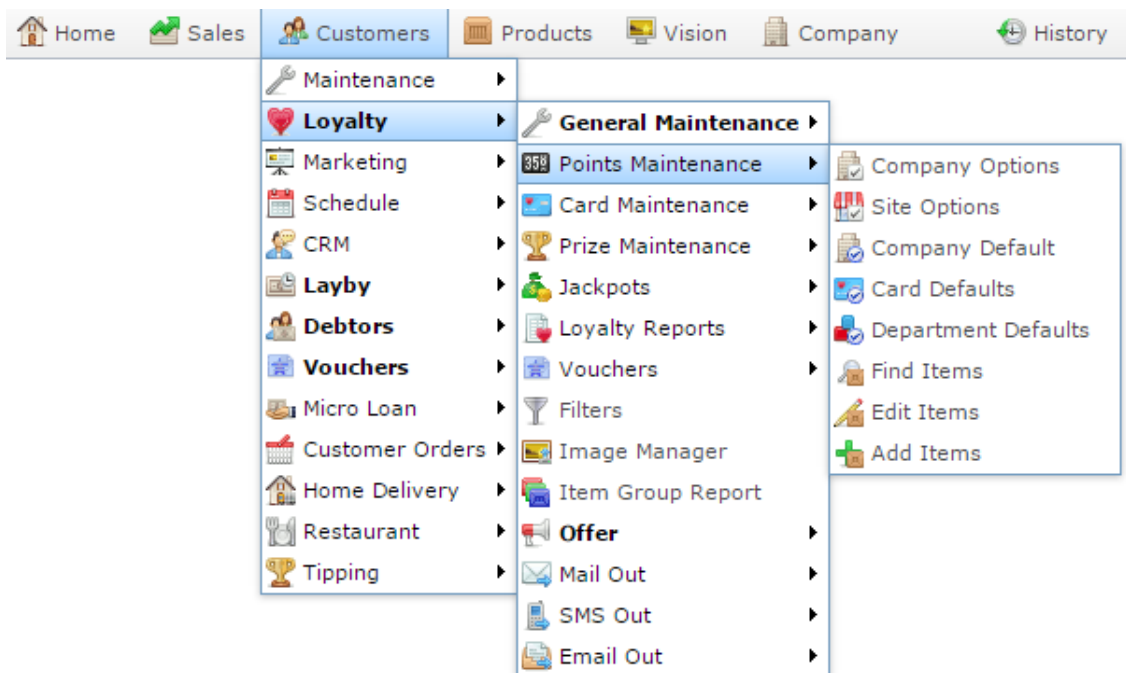
Create a new card type to create a type of loyalty customer with specific rewards and rules.

You can create multiple card types, including cards that provide discounts, points redemption, prizes and jackpots, or membership cards with renewal and expiry rules. Card types can automatically upgrade or downgrade to different card types that provide different rules and rewards.

Tip: Each of these options can be used with the others. For example, you can create a card type that offers points redemption, discounts and prizes, with membership renewal and expiry rules and an upgrade path to other card types. See the topics below for the different options you can create.

To create a new card type:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Card Defaults.**



The Card Type report is displayed.

Card Type Report

Descr	Card Type	Points per \$ Sale	Redeem Points per \$	Discount On Sales	Points per Renewal	Lost Card Points Penal	Default Active Flag	Allow Jackpot for non Active Cards	Follow Active Flag	Allow Jackpot for non Comp Cards	Key Tag	Expiry Type	Rollover Type	Linked Card
Default	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG50	50	0	0	0	0	0	✓					No Expiry	Normal	
FTG51	51	0	0	0	0	0	✓					No Expiry	Normal	
Sporti Globe	1	1	5	10	0	0	✓	✓		✓		Anniv	Normal	
TSG10	10	10	100	0	0	0	✓					No Expiry	Normal	
TSG11	11	20	100	0	0	0	✓					No Expiry	Normal	

Add to Favourites

Create New Card Type

3. Press **Create New Card Type**.

The Loyalty Card Type Maintenance screen is displayed.

Loyalty Card Type Maintenance

Card Type:

Description:

Minimum Sale For Points:

Maximum Sale Allowed:

Minimum Sale For Bonus:

Minimum Sale For Discount:

Minimum Sale For Redemption:

4. Type a unique code to represent the card type in the **Card Type** field.
5. Type a description of the card type in the **Description** field.
6. If you want to set minimum sales a loyalty member must make in order to receive discounts, bonuses or loyalty points, press the Limits tab.

See *Loyalty Card Type Maintenance screen* on page 162.

Also see *Creating a loyalty card type with transaction limits* on page 139.

7. If you want to change whether the card can receive jackpots and prizes, press the Control tab.

See *Loyalty Card Type Maintenance screen* on page 162.

Also see *Creating a loyalty card type for prizes and jackpots* on page 149.

8. If you want to set how the card accrues and redeems loyalty points, press the Points tab.

See *Loyalty Card Type Maintenance screen* on page 162.

Also see *Creating a loyalty card type to accrue or redeem loyalty points* on page 142.

Also see *Creating a loyalty card type to accrue or redeem loyalty points* on page 146.

9. If you want to set a discount the loyalty member receives, press the Discount tab.

See *Loyalty Card Type Maintenance screen* on page 162.

Also see *Creating a discount loyalty card type* on page 132.

10. If you want to set the terms and cost in points for renewing or replacing cards, press the Renewal tab.

See *Loyalty Card Type Maintenance screen* on page 162.

Also see *Creating a loyalty card type with renewal rules* on page 151.

11. If you want to set rules for expiring cards and points, press the Expiry tab.

See *Loyalty Card Type Maintenance screen* on page 162.

Also see *Creating a loyalty card type that expires* on page 135.

12. If you want to set rules for cards automatically upgrading or downgrading based on the loyalty members' behaviour, press the Movements tab.

See *Loyalty Card Type Maintenance screen* on page 162.

Also see *Creating a loyalty card upgrade path* on page 154.

13. Press  Save.

The card type is created.

Creating a discount loyalty card type

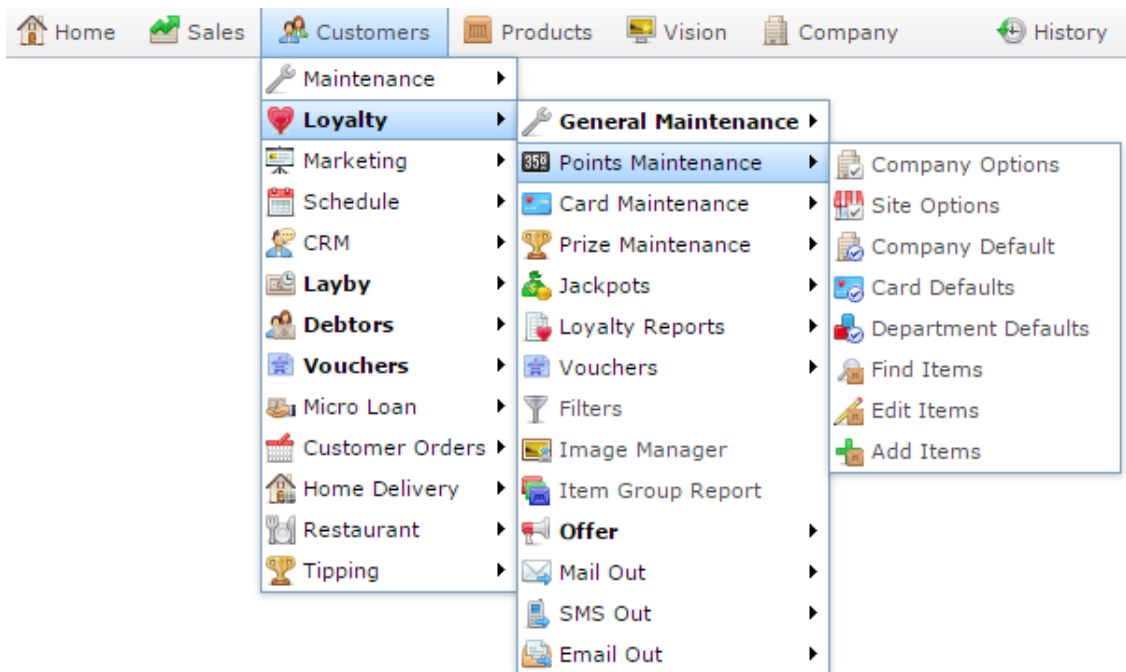
Create a discount loyalty card type to offer loyalty customers discounts off their purchases.

Note: A card can only offer one discount level. If you want to offer multiple levels of discounts to your loyalty customers, create an upgrade path. See *Creating a loyalty card upgrade path* on page 154

Tip: You can control how much a loyalty member must spend in the transaction to be eligible for discounts by adding transaction limits. See *Creating a loyalty card type with transaction limits* on page 139.

To create a discount card type:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Card Defaults.**



The Card Type report is displayed.

Card Type Report

Descr	Card Type	Points per \$ Sale	Redeem Points per \$	Discount On Sales	Points per Renewal	Lost Card Points Penal	Default Active Flag	Allow Jackpots for non Active Cards	Follow Active Flag	Allow Jackpots for non Comp Cards	Key Tag	Expiry Type	Rollover Type	Linked Card
Defau	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG	50	0	0	0	0	0	✓					No Expiry	Norma	
FTG5	51	0	0	0	0	0	✓					No Expiry	Norma	
Sporti	1	1	5	10	0	0	✓	✓		✓		Anniv	Norma	
TSG	10	10	100	0	0	0	✓					No Expiry	Norma	
TSG1	11	20	100	0	0	0	✓					No Expiry	Norma	

Add to Favourites

Create New Card Type

3. Press **Create New Card Type**.

The Loyalty Card Type Maintenance screen is displayed.

Loyalty Card Type Maintenance

Card Type:

Description:

Minimum Sale For Points:

Maximum Sale Allowed:

Minimum Sale For Bonus:

Minimum Sale For Discount:

Minimum Sale For Redemption:

4. Type a unique code to represent the card type in the **Card Type** field.
5. Type a description of the card type in the **Description** field.
6. Press the **Discount** tab.

The **Discount** tab is displayed.

Managing card types

The screenshot shows a web application window titled "Loyalty Card Type Maintenance". At the top, there are two input fields: "Card Type:" and "Description:". Below these is a horizontal menu with tabs: "Limits", "Control", "Points", "Discount", "Renewal", "Expiry", and "Movements". The "Discount" tab is currently selected. In the main content area, there is a label "Discount On Sales:" followed by an empty input field. At the bottom right of the window, there are three buttons: "New", "Save", and "Reset".

7. Type the discount percentage you want to offer your loyalty members.

For example, to offer a 10% discount, type **10**.

8. Press .

The card type is created.

Creating a loyalty card type that expires

Create a card type that expires to create a loyalty membership that must be maintained, or encourage loyalty members to redeem their points before they expire.

Note: Some Point of Sale systems do not allow points redemption when a card is expired, or may set a card's points to zero.

You can select:

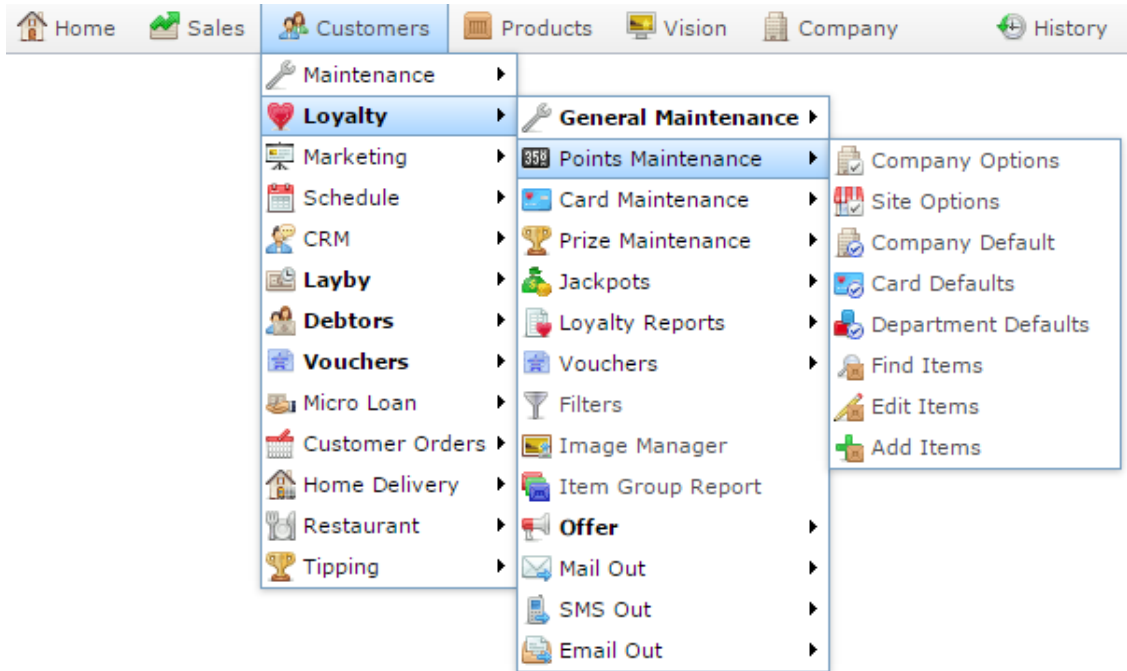
- To expire cards yearly, six-monthly, quarterly, or whenever you manually process your card expiries.
- To expire points from six months to five years after they have been accrued, in six-month intervals.
- To roll over remaining points into the next period.
- To store soon-to-be-expired points separately in a two-stage process, to notify the loyalty member of the number of points soon to expire before expiring them.

Tip: Card and points expiry works well with renewal services and upgrade paths. You can charge loyalty members loyalty points in order to renew their card. Customers who have not accrued enough points to renew are downgraded to a card with a lower loyalty reward level. See *Creating a loyalty card type with renewal rules* on page 151. Also see *Creating a loyalty card upgrade path* on page 154.

To create an expiring card type:

1. Press  **Customers**.
2. Press **Loyalty > Points Maintenance > Card Defaults**.

Managing card types



The Card Type report is displayed.

Card Type Report

Descr	Card Type	Points per \$ Sale	Redee per \$	Disco On Sales	Points per Renew	Lost Card Points Penal	Defau Active Flag	Allow Jacko Win for non Active Cards	Follow Active Flag	Allow Jacko Win for non Comp Cards	Key Tag	Expiry Type	Rollov Type	Linkec Card
Defau	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG	50	0	0	0	0	0	✓					No Expiry	Norme	
FTG5	51	0	0	0	0	0	✓					No Expiry	Norme	
Sporti	1	1	5	10	0	0	✓	✓		✓		Anniv	Norme	
TSG	10	10	100	0	0	0	✓					No Expiry	Norme	
TSG1	11	20	100	0	0	0	✓					No Expiry	Norme	

Buttons: Add to Favourites, Create New Card Type

3. Press **Create New Card Type**.

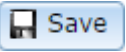
The Loyalty Card Type Maintenance screen is displayed.

4. Type a unique code to represent the card type in the **Card Type** field.
5. Type a description of the card type in the **Description** field.
6. Press the Expiry tab.

The Expiry tab is displayed.

7. Select whether you want to expire the card:
 - Yearly.
 - Six-monthly.
 - Quarterly.
 - Manually when you process card expiries.
 - No Expiry.
8. Select the period of time after which accrued points should expire.

Note: Expiry is applied to each point individually. For example, a loyalty member earns 10 loyalty points on the 1st of January, and another 30 points on the 3rd of March. If your expiry is set to 6 months, the first 10 points expire on the 1st July. So in June, the loyalty member has 40 points, but by July they have 30. The remaining 30 points expire on 3rd of September.

9. Select the roll over process.
10. Press .

The card type is created.

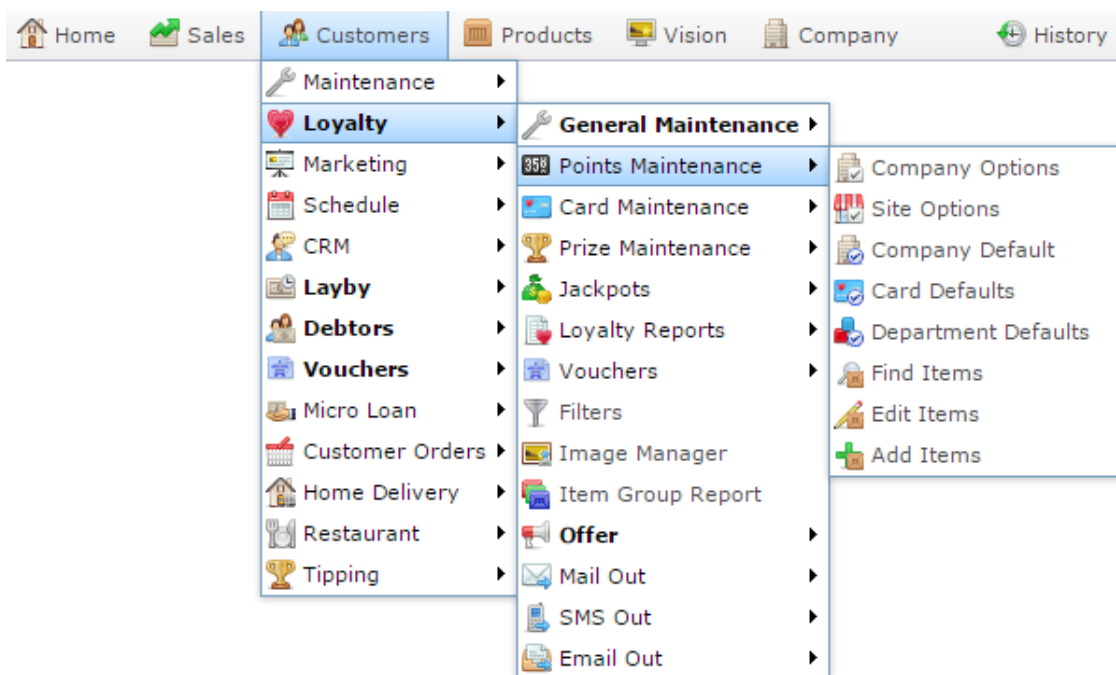
Creating a loyalty card type with transaction limits

Create a card type with transaction limits to control how much a customer must purchase in a single transaction to receive rewards, such as points redemption, discounts or bonuses.

Note: All of these minimums and maximums apply to individual transactions only. If you want to create a loyalty card where a customer must accrue a total purchase amount before they can receive rewards, create an upgrade path. See *Creating a loyalty card upgrade path* on page 154.

To create a new card type with transaction limits:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Card Defaults.**



The Card Type report is displayed.

Card Type Report

Descr	Card Type	Points per \$ Sale	Redeem Points per \$	Discount On Sales	Points per Renewal	Lost Card Points Penal	Default Active Flag	Allow Jackpots for non Active Cards	Follow Active Flag	Allow Jackpots for non Comp Cards	Key Tag	Expiry Type	Rollover Type	Linked Card
Defau	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG	50	0	0	0	0	0	✓					No Expiry	Norma	
FTG5	51	0	0	0	0	0	✓					No Expiry	Norma	
Sporti	1	1	5	10	0	0	✓	✓		✓		Anniv	Norma	
TSG	10	10	100	0	0	0	✓					No Expiry	Norma	
TSG1	11	20	100	0	0	0	✓					No Expiry	Norma	

Add to Favourites

Create New Card Type

3. Press **Create New Card Type**.

The Loyalty Card Type Maintenance screen is displayed.

Loyalty Card Type Maintenance

Card Type:

Description:

Minimum Sale For Points:

Maximum Sale Allowed:

Minimum Sale For Bonus:

Minimum Sale For Discount:

Minimum Sale For Redemption:

4. Type a unique code to represent the card type in the **Card Type** field.
5. Type a description of the card type in the **Description** field.
6. If the Limits tab is not already displayed, press the Limits tab.
7. If loyalty members accrue loyalty points with this card type, type the minimum amount they must spend to accrue any points in the **Minimum Sale For Points** field.

This is independent of how many points they accrue per dollar spent. For example, if you want your loyalty customers to only accrue points from a transaction where they spend \$10, type **10**.

8. If you want to limit how many points can be accrued in a single transaction, type the maximum amount in the **Maximum Sale Allowed** field.

For example, if customers accrue 1 point per dollar spent, and you want them to be able to accrue a maximum of 1000 points in a single transaction, type **1000**. This also applies to rewards such as bonuses and discounts.

Note: Type **0** to have no maximum limit on loyalty transactions.

9. If loyalty members receive a bonus reward for purchasing certain items, type the minimum amount they must spend to receive the bonus in the **Minimum Sale For Bonus** field.

For example, some items may grant loyalty customers additional loyalty points. If you want loyalty members to only receive bonus points if they spend \$10 or more when purchasing the item, type **10**.

10. If loyalty members receive a discount, type the minimum amount they must spend to receive their loyalty discount in the **Minimum Sale For Discount** field.

For example, if you offer a 15% discount to loyalty members when they spend \$50 or more in a transaction, type **50**.

11. If loyalty members can redeem points to pay for purchases, type the minimum amount they must spend in order to redeem points on that purchase in the **Minimum Sale For Redemption** field.

For example, if a loyalty member can only redeem points to pay for a transaction when that transaction is more than \$20, type **20**.

12. Press .

The card type is created.

Creating a loyalty card type to accrue or redeem loyalty points

Create a loyalty card type that accrues points if you want the Portal to automatically award loyalty members with loyalty points for certain activities, such as purchasing your products. You can configure a card to:

- Accrue and redeem loyalty points.
- Accrue and redeem loyalty points for different dollar amounts depending on the loyalty member's points level.

See *Creating a loyalty card type to accrue or redeem loyalty points* on page 146.

- Use loyalty points to renew the loyalty membership.
- Automatically expire non-redeemed points after a certain period.

See *Creating a loyalty card type with renewal rules* on page 151.

See *Creating a loyalty card type that expires* on page 135.

- Automatically upgrade or downgrade the card based on the points total.

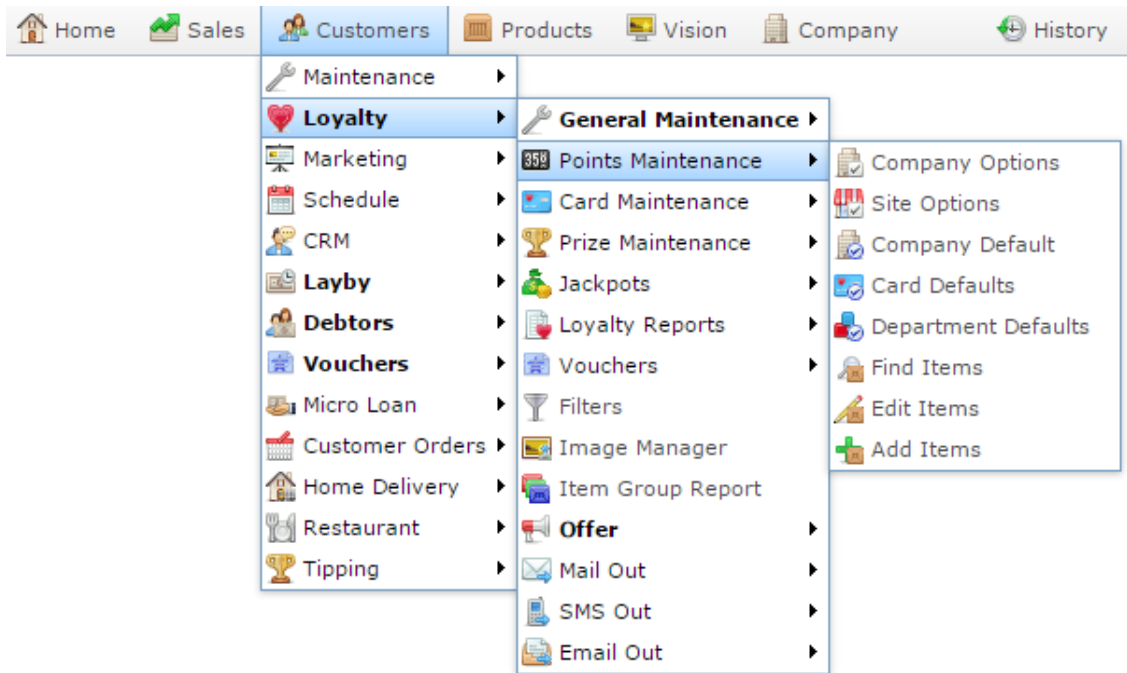
See *Creating a loyalty card upgrade path* on page 154.

Note: A card can only offer level of points accrued per dollar spent. If you want to offer multiple levels of points accrual to your loyalty customers, create an upgrade path. See *Creating a loyalty card upgrade path* on page 154

Tip: You can control how much a loyalty member must spend in the transaction to be eligible for loyalty points by adding transaction limits. See *Creating a loyalty card type with transaction limits* on page 139.

To create a card type that accrues and redeems points:

1. Press  **Customers**.
2. Press **Loyalty > Points Maintenance > Card Defaults**.



The Card Type report is displayed.

Card Type Report

Descr	Card Type	Points per \$ Sale	Redee per \$	Disco On Sales	Points per Renew	Lost Card Points Penal	Defau Active Flag	Allow Jacko Win for non Active Cards	Follow Active Flag	Allow Jacko Win for non Comp Cards	Key Tag	Expiry Type	Rollov Type	Linkec Card
Defau	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG	50	0	0	0	0	0	✓					No Expiry	Norme	
FTG5	51	0	0	0	0	0	✓					No Expiry	Norme	
Sporti	1	1	5	10	0	0	✓	✓		✓		Anniv	Norme	
TSG	10	10	100	0	0	0	✓					No Expiry	Norme	
TSG1	11	20	100	0	0	0	✓					No Expiry	Norme	

Buttons: Add to Favourites, Create New Card Type

3. Press **Create New Card Type**.

The Loyalty Card Type Maintenance screen is displayed.

Managing card types

The screenshot shows the 'Loyalty Card Type Maintenance' form with the 'Limits' tab selected. The form includes fields for 'Card Type' and 'Description'. Below the tabs, there are five rows of fields for setting limits: 'Minimum Sale For Points', 'Maximum Sale Allowed', 'Minimum Sale For Bonus', 'Minimum Sale For Discount', and 'Minimum Sale For Redemption'. Each field contains the value '0'. At the bottom right, there are 'New', 'Save', and 'Reset' buttons.

4. Type a unique code to represent the card type in the **Card Type** field.
5. Type a description of the card type in the **Description** field.
6. Press the Points tab.

The Points tab is displayed.

The screenshot shows the 'Loyalty Card Type Maintenance' form with the 'Points' tab selected. The form includes fields for 'Card Type' and 'Description'. Below the tabs, there are several fields for configuring points: 'Points per \$ Sale' (value: 1), 'Redeem Points per \$ (If Multiple Levels Disabled)' (value: 25), 'Redeem Multiples' (value: 1), and 'Multiple Redeem Levels' (value: No). Below these are five rows of fields for 'Redeem Points Level A' through 'E', each with a 'Redeem \$ Amount' field, all containing the value '0'. At the bottom right, there are 'New', 'Save', and 'Reset' buttons.

7. Type the number of points a loyalty member receives for every dollar they spend in the **Points per \$ Sale** field.

For example, if you want to reward your loyalty members with 10 points for every dollar spent, type **10**. A loyalty member who spends \$20 receives 200 points.

8. If you want all loyalty members on this card type to redeem the same number of points per dollar:
 1. Type the number of points a loyalty member must redeem per dollar in the **Redeem Points per \$ (If Multiple Levels Disabled)** field.

For example, if you want your loyalty members to redeem 100 points for each dollar, type **100**. If a loyalty member wants to pay for a \$30 transaction with loyalty points, they must redeem 3000 loyalty points.

Tip: You can also configure the card to redeem different numbers of points based on different levels of spending. See *Frequent Shopper Item Maintenance screen* on page 346.

2. Select **No** in the **Multiple Redeem Levels** field.

Note: If you want to allow loyalty members to redeem points at different levels on the same card, see *Creating a loyalty card type to accrue or redeem loyalty points* on page 146

9. Press .

The card type is created.

Creating a loyalty card type to accrue or redeem loyalty points

Create a loyalty card type that redeems points at different levels if you want to allow loyalty members with more loyalty points to redeem them at a better rate. For example, a loyalty member with 1000 points may redeem 10 points for \$1, but a loyalty member with 10,000 points may redeem 6 points for \$1.

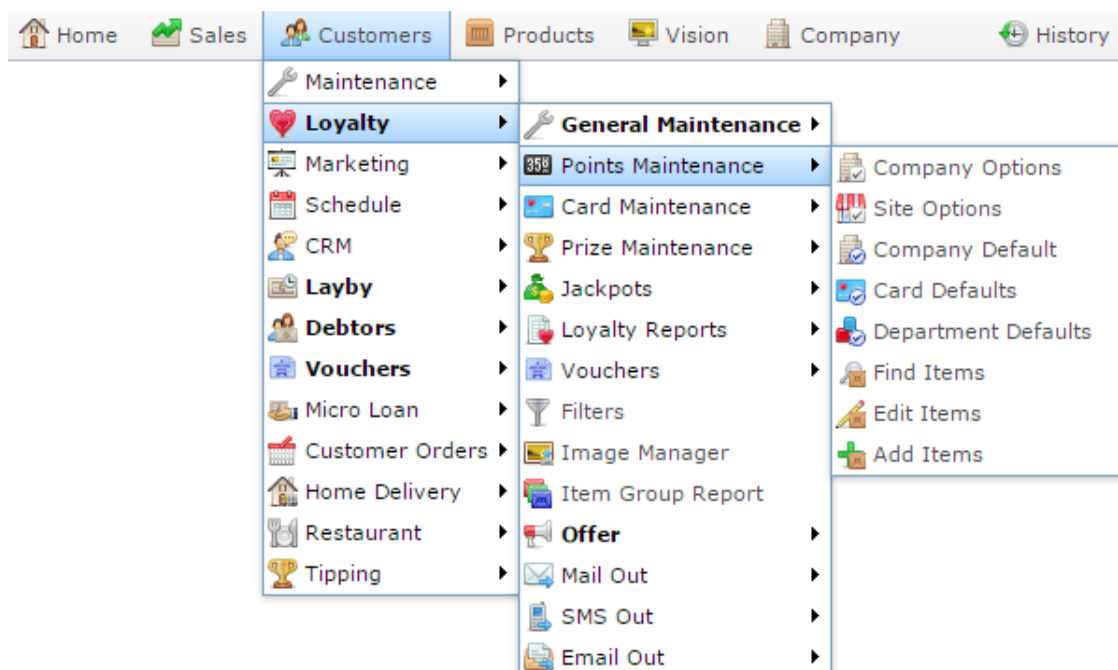
The Portal allows up to 5 different redemption levels per card. If you want to use more than 5 levels, create an upgrade path to another card with more levels. See *Creating a loyalty card upgrade path* on page 154.

Note: If you want to provide a flat rate for all redeemed points, see *Creating a loyalty card type to accrue or redeem loyalty points* on page 142.

Tip: You can control how much a loyalty member must spend in the transaction to be eligible for loyalty points by adding transaction limits. See *Creating a loyalty card type with transaction limits* on page 139.

To create a card type that redeems points at multiple levels:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Card Defaults.**



The Card Type report is displayed.

Card Type Report

Descr	Card Type	Points per \$ Sale	Redeem Points per \$	Discount On Sales	Points per Renewal	Lost Card Points Penal	Default Active Flag	Allow Jackpots for non Active Cards	Follow Active Flag	Allow Jackpots for non Comp Cards	Key Tag	Expiry Type	Rollover Type	Linked Card
Defau	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG	50	0	0	0	0	0	✓					No Expiry	Norma	
FTG5	51	0	0	0	0	0	✓					No Expiry	Norma	
Sporti	1	1	5	10	0	0	✓	✓		✓		Anniv	Norma	
TSG	10	10	100	0	0	0	✓					No Expiry	Norma	
TSG1	11	20	100	0	0	0	✓					No Expiry	Norma	

Add to Favourites

Create New Card Type

3. Press **Create New Card Type**.

The Loyalty Card Type Maintenance screen is displayed.

Loyalty Card Type Maintenance

Card Type:

Description:

Minimum Sale For Points:

Maximum Sale Allowed:

Minimum Sale For Bonus:

Minimum Sale For Discount:

Minimum Sale For Redemption:

4. Type a unique code to represent the card type in the **Card Type** field.
5. Type a description of the card type in the **Description** field.
6. Press the Points tab.

The Points tab is displayed.

Loyalty Card Type Maintenance

Card Type:

Description:

Limits Control **Points** Discount Renewal Expiry Movements

Points per \$ Sale:

Redeem Points per \$ (If Multiple Levels Disabled):

Redeem Multiples:

Multiple Redeem Levels:

Redeem Points Level A:	<input type="text" value="0"/>	Redeem \$ Amount A:	<input type="text" value="0"/>
Redeem Points Level B:	<input type="text" value="0"/>	Redeem \$ Amount B:	<input type="text" value="0"/>
Redeem Points Level C:	<input type="text" value="0"/>	Redeem \$ Amount C:	<input type="text" value="0"/>
Redeem Points Level D:	<input type="text" value="0"/>	Redeem \$ Amount D:	<input type="text" value="0"/>
Redeem Points Level E:	<input type="text" value="0"/>	Redeem \$ Amount E:	<input type="text" value="0"/>

New Save Reset

7. Type the number of points a loyalty member receives for every dollar they spend in the **Points per \$ Sale** field.

For example, if you want to reward your loyalty members with 10 points for every dollar spent, type **10**. A loyalty member who spends \$20 receives 200 points.

8. Select **Yes** in the **Multiple Redeem Levels** drop-down field.
9. For each redemption level you want to create:
 1. Type the number of points the loyalty member must have to be eligible for this redemption rate in the **Redeem Points** field for that level.
 2. Type the number of points a loyalty member must redeem per dollar in the **Redeem \$ Amount** field for that level.

For example, if you want customers with 1000 points to redeem 10 points per dollar, type **1000** in the **Redeem Points Level A** field, and **10** in the **Redeem \$ Amount A** field.

10. Press  **Save**.

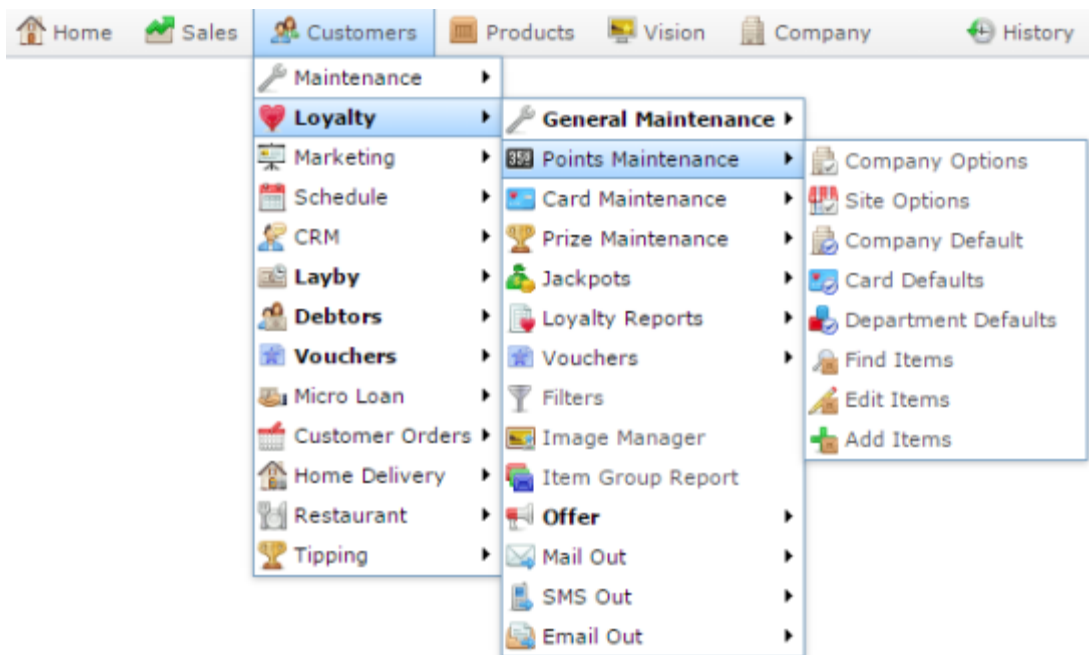
The card type is created.

Creating a loyalty card type for prizes and jackpots

Create a loyalty card type for prizes and jackpots if you want to offer your loyalty members lottery-draw type prizes for continued membership.

To create a card type for prizes and jackpots:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Card Defaults.**



The Card Type report is displayed.

Card Type Report

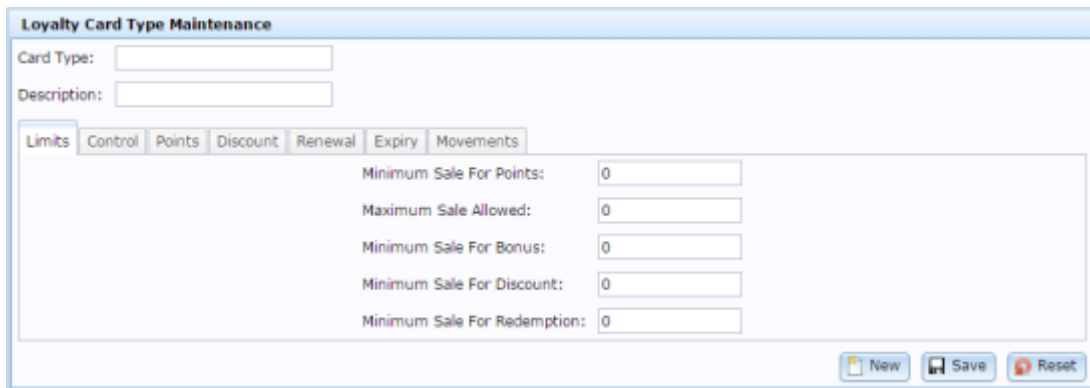
Descr	Card Type	Points per \$ Sale	Redeem per \$	Disc On Sales	Points per Renew	Lost Card Points Penal	Default Active Flag	Allow Jackp Win for non Active Cards	Follow Active Flag	Allow Jackp Win for non Comp Cards	Key Tag	Expiry Type	Rollov Type	Linked Card
Defau	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG 50	50	0	0	0	0	0	✓					No Expiry	Norms	
FTG5	51	0	0	0	0	0	✓					No Expiry	Norms	
Sport1 Globe	1	1	5	10	0	0	✓	✓		✓		Anniv	Norms	
TSG 10	10	10	100	0	0	0	✓					No Expiry	Norms	
TSG1	11	20	100	0	0	0	✓					No Expiry	Norms	

Buttons: Add to Favourites, Create New Card Type

3. Press **Create New Card Type.**

Managing card types

The Loyalty Card Type Maintenance screen is displayed.



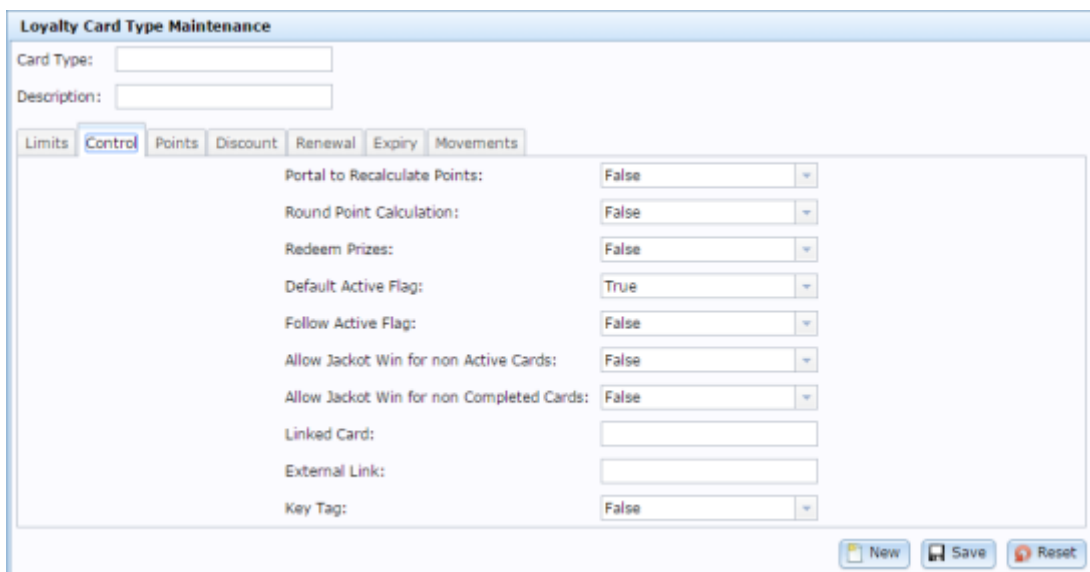
The screenshot shows the 'Loyalty Card Type Maintenance' window. At the top, there are two input fields: 'Card Type:' and 'Description:'. Below these are several tabs: 'Limits', 'Control', 'Points', 'Discount', 'Renewal', 'Expiry', and 'Movements'. The 'Limits' tab is currently selected. It contains five rows of settings, each with a label and a text input field containing the value '0':

Minimum Sale For Points:	0
Maximum Sale Allowed:	0
Minimum Sale For Bonus:	0
Minimum Sale For Discount:	0
Minimum Sale For Redemption:	0

At the bottom right of the window are three buttons: 'New', 'Save', and 'Reset'.

4. Type a unique code to represent the card type in the **Card Type** field.
5. Type a description of the card type in the **Description** field.
6. Press the Control tab.


The Control tab is displayed.



The screenshot shows the 'Loyalty Card Type Maintenance' window with the 'Control' tab selected. It contains several settings, each with a label and a dropdown menu or text input field:

Portal to Recalculate Points:	False
Round Point Calculation:	False
Redeem Prizes:	False
Default Active Flag:	True
Follow Active Flag:	False
Allow Jackpot Win for non Active Cards:	False
Allow Jackpot Win for non Completed Cards:	False
Linked Card:	
External Link:	
Key Tag:	False

At the bottom right of the window are three buttons: 'New', 'Save', and 'Reset'.

7. To allow loyalty cards to receive prizes, select **True** in the **Redeem Prizes** field.
8. To allow loyalty cards to win jackpots even if the card has not been activated, select **True** in the **Allow Jackpot Win for non Active Cards** field.
9. To allow loyalty cards to win jackpots even if all card details have not been completed, select **True** in the **Allow Jackpot Win for non Completed Cards** field.
10. To automatically activate cards when they are created, select **True** in the **Default Active Flag** field.
11. Press  **Save**.

The card type is created.

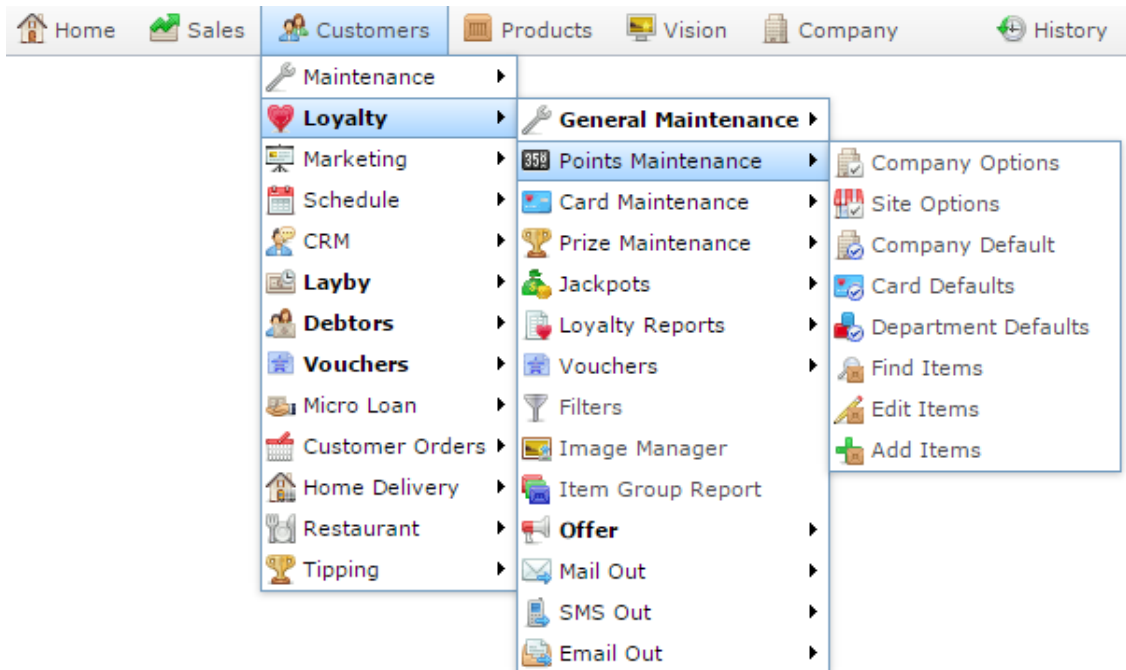
Creating a loyalty card type with renewal rules

Create a card type with automatic renewal to create an ongoing loyalty membership. You can deduct a number of loyalty points from loyalty members when renewing to encourage loyalty members to make the most of their membership.

Tip: Card renewals works well with upgrade paths. Customers who have not accrued enough points to renew are downgraded to a card with a lower loyalty reward level. See *Creating a loyalty card upgrade path* on page 154.

To create a renewing card type:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Card Defaults.**



The Card Type report is displayed.

Card Type Report

Descr	Card Type	Points per \$ Sale	Redeem Points per \$ Sales	Discount	Points per Renewal	Lost Card Points Penal	Default Active Flag	Allow Jackpots for non Active Cards	Follow Active Flag	Allow Jackpots for non Comp Cards	Key Tag	Expiry Type	Rollover Type	Linked Card
Defau	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG	50	0	0	0	0	0	✓					No Expiry	Norma	
FTG5	51	0	0	0	0	0	✓					No Expiry	Norma	
Sporti	1	1	5	10	0	0	✓	✓		✓		Anniv	Norma	
TSG	10	10	100	0	0	0	✓					No Expiry	Norma	
TSG1	11	20	100	0	0	0	✓					No Expiry	Norma	

Add to Favourites

Create New Card Type

3. Press **Create New Card Type**.

The Loyalty Card Type Maintenance screen is displayed.

Loyalty Card Type Maintenance

Card Type:

Description:

Minimum Sale For Points:

Maximum Sale Allowed:

Minimum Sale For Bonus:

Minimum Sale For Discount:

Minimum Sale For Redemption:

4. Type a unique code to represent the card type in the **Card Type** field.
5. Type a description of the card type in the **Description** field.
6. Press the **Renewal** tab.

The **Renewal** tab is displayed.

Loyalty Card Type Maintenance

Card Type:




Description:

Limits Control Points Discount **Renewal** Expiry Movements

Points per Renewal:

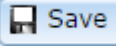
Renewal Years:

Lost Card Points Penalty:

7. Type the number of points to deduct when renewing a card in the **Points per Renewal** field.

Note: If you want to create a card that automatically renews without charging the loyalty member any points, type **0**.

8. Select the period of time a renewed card is valid for in the **Renewal Years** drop-down list. For example, if you want a loyalty card to be valid for 3 years before needing renewal, select **Every 3rd Year**.
9. Type the number of points deducted for replacing a lost card in the **Lost Card Points Penalty** field.
10. Press  .
The card type is created.

Creating a loyalty card upgrade path

Create an upgrade path if you want to link multiple loyalty card types in a progression. Loyalty members who achieve the trigger point, such as purchasing a specific item or earning a certain number of loyalty points, are automatically upgraded to the next card level. Similarly, loyalty members who do not maintain requirements such as purchasing a specific item or earning a certain number of loyalty points during a specific period are automatically downgraded to the previous card level.

Note: A card can only specify one trigger type. You cannot upgrade or downgrade to different cards based on different types of triggers.

For example, if you want to create:

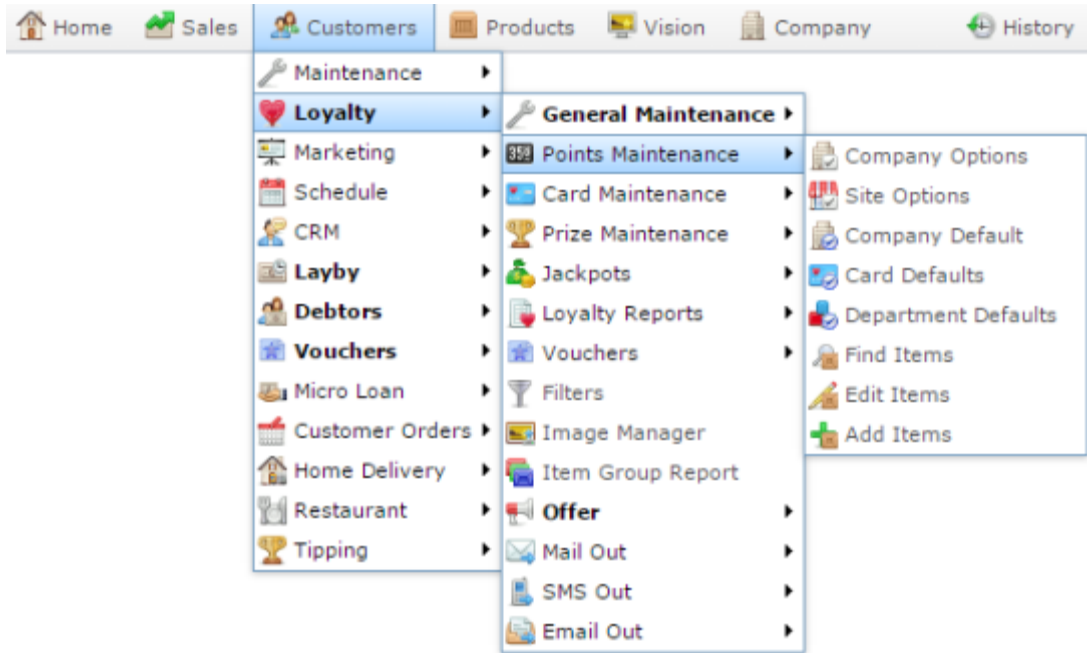
- Different discount levels for loyalty members based on their purchases.
- Prizes or higher reward tiers for loyalty members who are very active.
- More than 5 levels of points redemption.
- Purchased membership programs with tiers.

Each card level specifies the card that it upgrades and downgrades to. Cards do not have to upgrade or downgrade reciprocally. That is, if a Blue card upgrades to a Green card, the Green card does not have to downgrade to the Blue card, or specify a downgrade card at all.

Note: You must select the upgrade and downgrade cards from a list of existing cards. It is easiest if you create all your loyalty card types first before creating your upgrade paths.

To create a new card upgrade path:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Card Defaults.**



The Card Type report is displayed.

Card Type Report

Descr	Card Type	Points per \$ Sale	Redeem per \$	Disc On Sales	Points per Renew	Lost Card Points Penal	Default Active Flag	Allow Jackp Win for non Active Cards	Follow Active Flag	Allow Jackp Win for non Comp Cards	Key Tag	Expiry Type	Rollov Type	Linked Card
Defau	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG	50	0	0	0	0	0	✓					No Expiry	Norms	
FTG5	51	0	0	0	0	0	✓					No Expiry	Norms	
Sport	1	1	5	10	0	0	✓	✓		✓		Anniv	Norms	
TSG	10	10	100	0	0	0	✓					No Expiry	Norms	
TSG1	11	20	100	0	0	0	✓					No Expiry	Norms	

Buttons: Add to Favourites, Create New Card Type

3. Press **Create New Card Type**.

The Loyalty Card Type Maintenance screen is displayed.

4. Type a unique code to represent the card type in the **Card Type** field.
5. Type a description of the card type in the **Description** field.
6. Press **Movements**.

The **Movements** tab is displayed.

7. Select the trigger type to base the upgrade and downgrade on in the **Trigger Type** drop-down field:
 - **Min Points** to upgrade or downgrade based on whether a loyalty member has maintained a minimum points level during the period.
 - **Points Value.**
 - **Transaction Sales** to upgrade or downgrade based on how much the loyalty member has had during the period.
 - **Transaction Counts** to upgrade or downgrade based on how many transactions the loyalty member has had during the period.
 - **Item Present** to upgrade or downgrade based on whether a loyalty member has purchased a specific item during the period, such as a membership package.

8. Select the period over which the loyalty member's status is assessed in the **Period** drop-down field.

For example, if you require a customer to spend \$500 a year to maintain this loyalty card status, then the **Trigger Type** is **Transaction Sales**, and the **Period** is **1 Year**.

Tip: You can turn off the time factor in upgrade assessments. For example, if you want a loyalty card to upgrade when a loyalty member has spent \$1000 total at your company, regardless of how long it took them, select **Disabled** in the **Period** drop-down field.

9. Select the card type to upgrade to in the **Better Card Type** drop-down field.
10. Type the amount that triggers the upgrade if the loyalty member reaches it in the **Better Trigger Point** field.

For example, if you require a customer to spend \$1000 a year to upgrade to the next loyalty card status, type **1000**.

11. Select the card type to downgrade to in the **Worse Card Type** drop-down field.
12. Type the amount that triggers the downgrade if it is not reached in the **Worse Trigger Point** field.

For example, if you require a customer to spend at least \$300 a year to stay at this loyalty card status, type **300**.

13. Type the minimum value a transaction must have to count towards both the upgrade and downgrade path.

For example, if you only want to count transactions where a customer spends at least \$10, type **10**.

If you require a customer to spend at least \$500 a year to stay at this loyalty card status, and require that transactions must be over \$20 to be counted, then a customer who makes a \$10 purchase every week will not meet the threshold, but a customer who makes a \$20 purchase every fortnight will.

14. Type the item code of the item that must be purchased to trigger the upgrade in the **Item** field.

For example, if you have created an item that represents a membership package, type the item code of that item.

15. Press .

The card type is created.

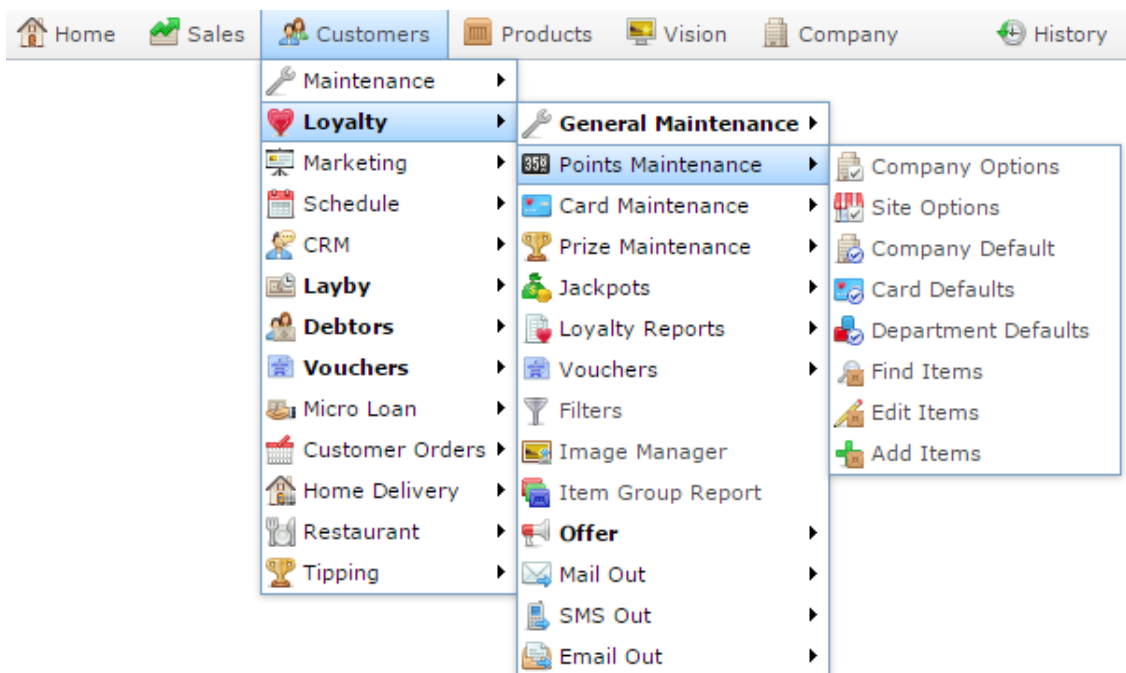
Editing a loyalty card type

Edit a loyalty card type when you want to change how all cards of this type behave in the portal, including:

- Minimums for bonuses, points and discounts.
- How points are accrued and redeemed.
- Discounts the card receives.
- How card renewals, replacements and expiry works.
- How cards automatically upgrade or downgrade.

To edit a loyalty card type:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Card Defaults.**



The Card Type report is displayed.

Card Type Report

Descr	Card Type	Points per \$ Sale	Redeem Points per \$	Discount On Sales	Points per Renewal	Lost Card Points Penal	Default Active Flag	Allow Jackpots for non Active Cards	Follow Active Flag	Allow Jackpots for non Comp Cards	Key Tag	Expiry Type	Rollover Type	Linked Card
Defau	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG	50	0	0	0	0	0	✓					No Expiry	Norma	
FTG5	51	0	0	0	0	0	✓					No Expiry	Norma	
Sporti	1	1	5	10	0	0	✓	✓		✓		Anniv	Norma	
TSG	10	10	100	0	0	0	✓					No Expiry	Norma	
TSG1	11	20	100	0	0	0	✓					No Expiry	Norma	

Add to Favourites

Create New Card Type

- Press the **Description** of the card type you want to edit.
The Loyalty Card Type Maintenance screen is displayed.

Loyalty Card Type Maintenance

Card Type:

Description:

Minimum Sale For Points:

Maximum Sale Allowed:

Minimum Sale For Bonus:

Minimum Sale For Discount:

Minimum Sale For Redemption:

- Make the required changes.
See *Loyalty Card Type Maintenance screen* on page 162.
 - Press .
- The changes are saved.

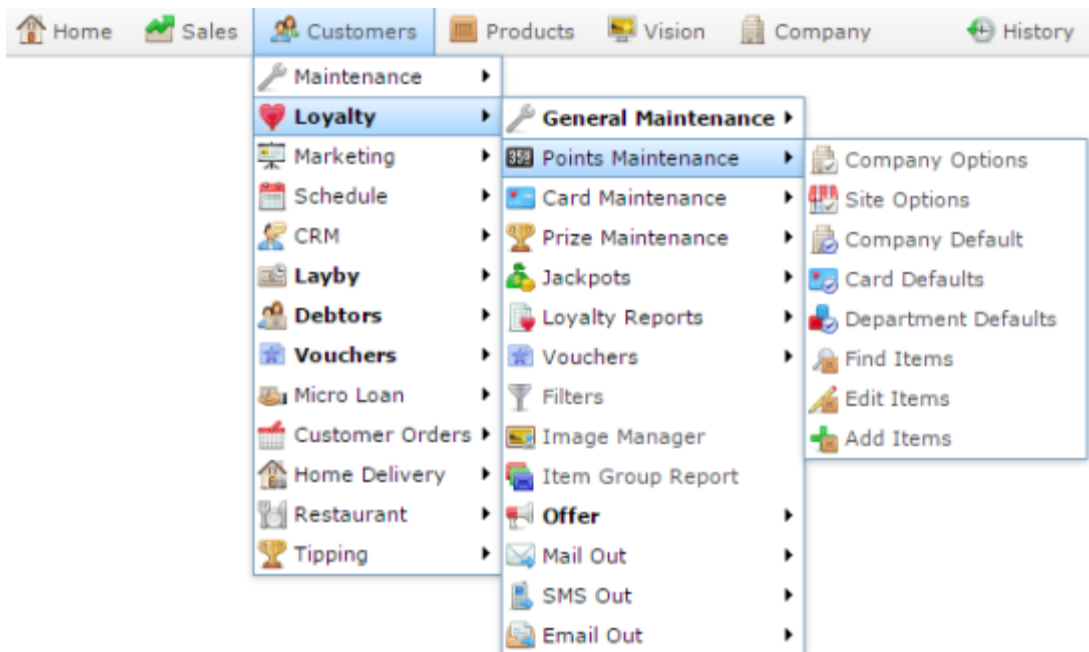
Deleting a loyalty card type

Delete a loyalty card type when you do not want the type used in the Portal.

Note: You cannot delete a type if loyalty cards of that type exist. You must set the loyalty cards to a different type first.

To delete a loyalty card type:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Card Defaults.**



The Card Type report is displayed.

Card Type Report

Descr	Card Type	Points per \$ Sale	Redeem per \$ Sales	Discount	Points per Renewal	Lost Card Points Penal	Default Active Flag	Allow Jackpots for non Active Cards	Follow Active Flag	Allow Jackpots for non Comp Cards	Key Tag	Expiry Type	Rollover Type	Linked Card
Defau	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG	50	0	0	0	0	0	✓					No Expiry	Norms	
FTG5	51	0	0	0	0	0	✓					No Expiry	Norms	
Sport	1	1	5	10	0	0	✓	✓		✓		Anniv	Norms	
TSG	10	10	100	0	0	0	✓					No Expiry	Norms	
TSG1	11	20	100	0	0	0	✓					No Expiry	Norms	

Add to Favourites

Create New Card Type

- Press the **Description** of the card type you want to edit.
The Loyalty Card Type Maintenance screen is displayed.

Loyalty Card Type Maintenance

Card Type:

Description:

Minimum Sale For Points:
 Maximum Sale Allowed:
 Minimum Sale For Bonus:
 Minimum Sale For Discount:
 Minimum Sale For Redemption:

- Press .

The card is deleted.

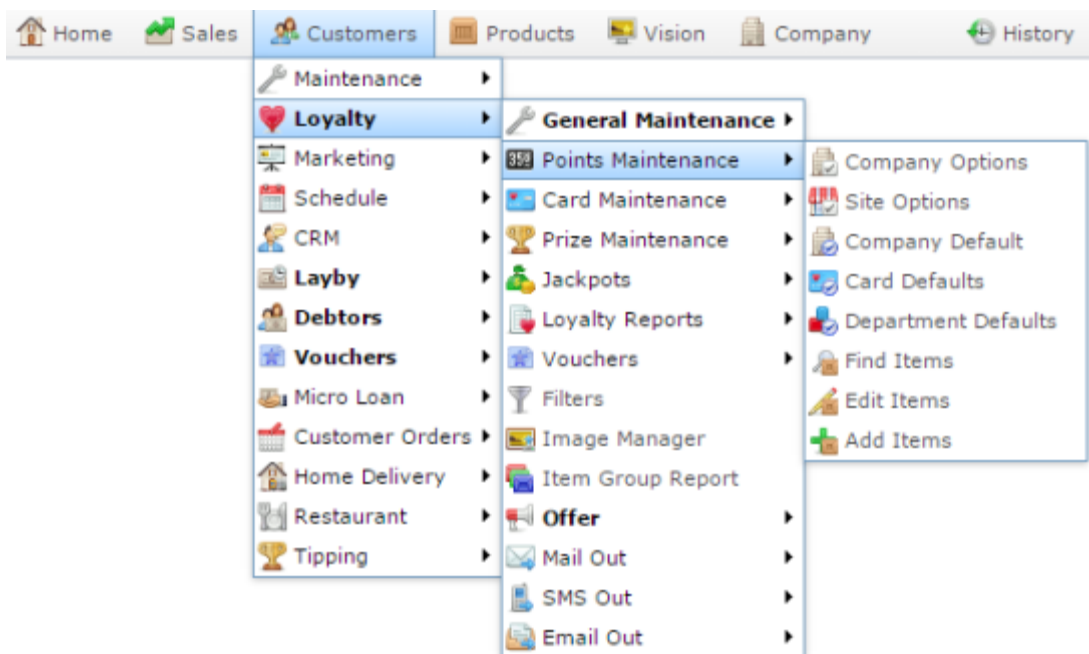
Loyalty Card Type Maintenance screen

Use the Loyalty Card Type Maintenance screen to create and maintain loyalty card types that allow different loyalty rewards.

Opening the Loyalty Card Type Maintenance screen

To open the Loyalty Card Type Maintenance screen:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Card Defaults.**



The Card Type report is displayed.

Card Type Report

Descr	Card Type	Points per \$ Sale	Redee per \$ Sales	Disco On Sales	Points per Renew	Lost Card Points Penal	Defau Active Flag	Allow Jacko Win for non Active Cards	Follow Active Jacko Flag	Allow Jacko Win for non Comp Cards	Key Tag	Expiry Type	Rollov Type	Linke Card
Defau	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG	50	0	0	0	0	0	✓					No Expiry	Norms	
FTG5	51	0	0	0	0	0	✓					No Expiry	Norms	
Sport	1	1	5	10	0	0	✓	✓		✓		Anniv	Norms	
TSG	10	10	100	0	0	0	✓					No Expiry	Norms	
TSG1	11	20	100	0	0	0	✓					No Expiry	Norms	

Buttons: Add to Favourites, Create New Card Type

3. Press the **Description** of the card type you want to edit.
The Loyalty Card Type Maintenance screen is displayed.

Loyalty Card Type Maintenance

Card Type:

Description:

Minimum Sale For Points:

Maximum Sale Allowed:

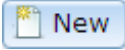
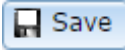

Minimum Sale For Bonus:

Minimum Sale For Discount:

Minimum Sale For Redemption:

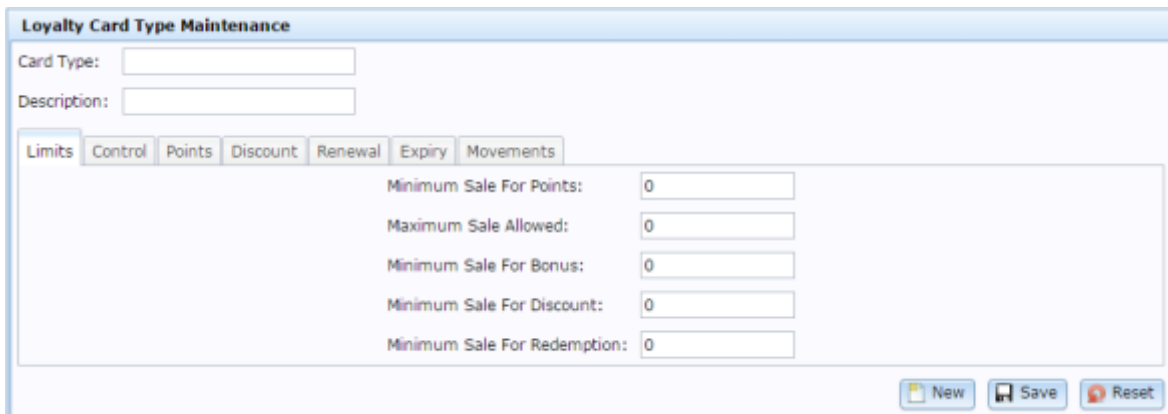
Loyalty Card Type Maintenance screen key fields and buttons

Common fields and buttons

Field	Description
Card Type	Unique code identifying the card type.
Description	Description of the card type.
	Press to create a new card type.
	Press to save any changes you have made to the card type.
	Press to undo any changes you have made since the card type was last saved.

Limits tab

Use this tab to define the minimum requirements for the loyalty card to permit rewards such as discounts, points accrual and bonuses.



Field	Description
-------	-------------

Field	Description
Minimum Sale For Points	The minimum amount that must be purchased in order to receive loyalty points in a transaction.
Maximum Sale Allowed	The maximum dollar amount of a sale that is allowed to generate loyalty points. For example, if your maximum is \$1000, then a purchase of \$1500 only generates \$1000 worth of loyalty points.
Minimum Sale For Bonus	The minimum amount that must be purchased in order to receive a loyalty bonus in a transaction.
Minimum Sale For Discount	The minimum amount that must be purchased in order to receive a loyalty discount in a transaction.
Minimum Sale For Redemption	The minimum amount that must be purchased in order to redeem points in a transaction

Control tab

Use this tab to determine rules about how points are calculated, and whether or not the card type is eligible for jackpots and prizes.

The screenshot shows the 'Loyalty Card Type Maintenance' window with the 'Control' tab selected. The interface includes input fields for 'Card Type' and 'Description'. Below these are tabs for 'Limits', 'Control', 'Points', 'Discount', 'Renewal', 'Expiry', and 'Movements'. The 'Control' tab contains several settings, each with a dropdown menu:

- Portal to Recalculate Points: False
- Round Point Calculation: False
- Redeem Prizes: False
- Default Active Flag: True
- Follow Active Flag: False
- Allow Jackpot Win for non Active Cards: False
- Allow Jackpot Win for non Completed Cards: False
- Linked Card: (empty text field)
- External Link: (empty text field)
- Key Tag: False

At the bottom right of the window are three buttons: 'New', 'Save', and 'Reset'.

Field	Description
Portal to Recalculate Points	Select True if you want the Portal to recalculate loyalty points and override any calculations sent by the Point of Sale.
Round Point Calculation	Select True if you want the Portal to round to the nearest point when recalculating points.
Redeem Prizes	Select True if loyalty members with this loyalty card type are allowed to redeem prizes.
Default Active Flag	Select True to make this card type start in active status by default.
Follow Active Flag	Select True if this card should only be eligible for loyalty rewards if it is active.
Allow Jackpot Win for non Active Cards	Select True to allow cards of this type to win jackpots even if they aren't active.
Allow Jackpot Win for non Completed Cards	Select True to allow cards of this type to win jackpots even if they have not completed the minimum required details for jackpots.
Linked Card	Type the card type code of the parent type of this card type.
External Link	Type the command to execute after creating a new card of this type.
Key Tag	This field is no longer used.

Points tab

Use this tab to define how loyalty points are accrued and redeemed on this card.

Field	Description
Points per \$ Sale	Type the number of points awarded per dollar in a transaction. For example, if a loyalty member receives 3 Points per \$ Sale and spends \$30, they are awarded 90 points.
Redeem Points per \$ (If Multiple Levels Disabled)	Type the number of points a loyalty member redeems per dollar. For example, if there are 100 Redeem Points per \$, a loyalty member would have to redeem 1000 points to pay for a \$10 transaction with loyalty points.
Redeem Multiples	Type the multiplier to use for the dollar value when the loyalty member redeems a multiple of 25.

Note: This is a simplified version of the **Multiple Redeem Levels**, where all multiples are of 25 points: 25, 50, 100, etc.

Field	Description
Multiple Redeem Levels	<p>Select Yes if you want to allow points to be redeemed for different amounts of money depending on the number of points the loyalty member has accrued.</p> <p>For example, loyalty members who have accrued 1000 points may redeem points at 10 points per dollar. Loyalty members who have accrued 5000 points may redeem points at 8 points per dollar.</p>
Redeem Points Level [A-E]	Type the number of points the loyalty member must accrue to redeem points at this level.
Redeem \$ Amount [A-E]	Type the number of points a loyalty member redeems per dollar at this level.

Discount tab

Use this tab to define the discount level received by this card.

The screenshot shows a web application window titled "Loyalty Card Type Maintenance". It features two input fields at the top: "Card Type:" and "Description:". Below these is a horizontal tabbed menu with tabs for "Limits", "Control", "Points", "Discount" (which is highlighted), "Renewal", "Expiry", and "Movements". Under the "Discount" tab, there is a label "Discount On Sales:" followed by an empty input field. At the bottom right of the window, there are three buttons: "New", "Save", and "Reset".

Field	Description
-------	-------------

Field	Description
Discount on Sales	Type the percentage discount applied to sales for loyalty members of this card type.

Renewal tab

Use this tab to define the number of points deducted when renewing or replacing a card.

The screenshot shows the 'Loyalty Card Type Maintenance' window. At the top, there are input fields for 'Card Type' and 'Description'. Below these are several tabs: 'Limits', 'Control', 'Points', 'Discount', 'Renewal', 'Expiry', and 'Movements'. The 'Renewal' tab is selected and highlighted. Inside the 'Renewal' tab, there are three main fields: 'Points per Renewal' with an input box, 'Renewal Years' with a dropdown menu currently set to 'No Renewal', and 'Lost Card Points Penalty' with an input box. At the bottom right of the window, there are three buttons: 'New', 'Save', and 'Reset'.

Field	Description
Points per Renewal	Type the number of points deducted to renew the card. These points are deducted each time a card goes through the renewal process.
Renewal Years	Select the number of years after which a card must be renewed.
Lost Card Points Penalty	Type the number of points deducted to replace a lost card.

Expiry tab

Use this tab to determine how points expire and roll over renewal periods.

Managing card types

Loyalty Card Type Maintenance

Card Type:

Description:

Limits Control Points Discount Renewal **Expiry** Movements

Expiry Type: No Expiry

Points Expiry: No Expiry

Rollover Type: Normal

New Save Reset

Field	Description
Expiry Type	Select from which date the Portal should judge cards as expired.
No Expiry	Select to never automatically expire the loyalty card.
Anniversary	Select to expire based on the loyalty member's join date.
Date of Process	Select to expire based on the date of the transaction that activated the loyalty card.
Points Expiry	Select the length of time before accrued points expire.

Field	Description
Rollover Type	Select how points roll over between renewal periods.
Normal	Roll over remaining points into the next period.
Two-stage	Separate points that will soon expire and notify the loyalty member of their expiry before expiring them.

Movements tab

Use this tab to determine how cards can automatically upgrade or downgrade.

The screenshot shows the 'Loyalty Card Type Maintenance' window with the 'Movements' tab selected. The fields are as follows:

- Card Type:
- Description:
- Limits: Control: Points: Discount: Renewal: Expiry: **Movements:**
- Trigger Type:
- Period:
- Better Card Type:
- Better Trigger Point:
- Worse Card Type:
- Worse Trigger Point:
- Minimum Transaction Value:
- Card Type By Item:
- Item:

Buttons at the bottom right:

Field	Description
-------	-------------

Field	Description
Trigger Type	<p>Select the type of action that triggers an upgrade or downgrade. For example, number of transactions, total sales amount of all transactions, total points accrued or a specific item being purchased.</p> <hr/> <p>Disabled Select to prevent automatic upgrade or downgrade of cards.</p> <hr/> <p>Min Points Select if you want to upgrade or downgrade cards based on the number of points the loyalty customer has accrued during the period.</p> <hr/> <p>Points Value Select if you want to upgrade or downgrade cards based on the number of points earned in a transaction.</p> <hr/> <p>Transaction Sales Select if you want to upgrade or downgrade cards based on how much the customer has purchased from you during the period.</p> <hr/> <p>Transaction Count Select if you want to upgrade or downgrade cards based on how many times the customer has purchased from you during the period.</p> <hr/> <p>Item Present Select if you want to upgrade or downgrade cards based on whether the customer has purchased a specific item from you during the period.</p> <div data-bbox="480 1527 1390 1655" style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 5px; margin-top: 10px;"> <p>Note: You must use the same type of action for both upgrades and downgrades of cards.</p> </div>
Period	Select the period over which the trigger must take place.
Better Card Type	Select the card type this card should upgrade to if a trigger is met.

Field	Description
Better Trigger Point	<p>Type the trigger target at which the card automatically upgrades.</p> <p>For example, if you have selected transaction sales, then a Better Trigger Point of 1000 automatically upgrades the card when the loyalty member has purchased \$1000 of goods or services from you during the specified period.</p>
Worse Card Type	<p>Select the card type this card should downgrade to if a minimum trigger is not met.</p>
Worse Trigger Point	<p>Type the trigger target below which the card automatically downgrades at the end of the period.</p> <p>For example, if you have selected transaction sales, then a Worse Trigger Point of 200 automatically downgrades the card if the loyalty member has not purchased at least \$200 of goods or services from you during the specified period.</p>
Minimum Transaction Value	<p>Type the minimum value a transaction must have to count as towards the number of transactions, if using a Transaction Total as the Trigger Type.</p> <p>For example, if you are using a Transaction Total of 100 transactions for upgrade, but you only want to count transactions that are worth at least \$10, type 10.</p>
Card Type By Item	<p>Type the item code of the item that triggers the card upgrade.</p> <p>For example, if you create an inventory item to represent a membership package or card upgrade, type that item's item code.</p>
Item	<p>Type the code of the item used as the trigger to upgrade the card, if using the Item Present trigger type.</p>

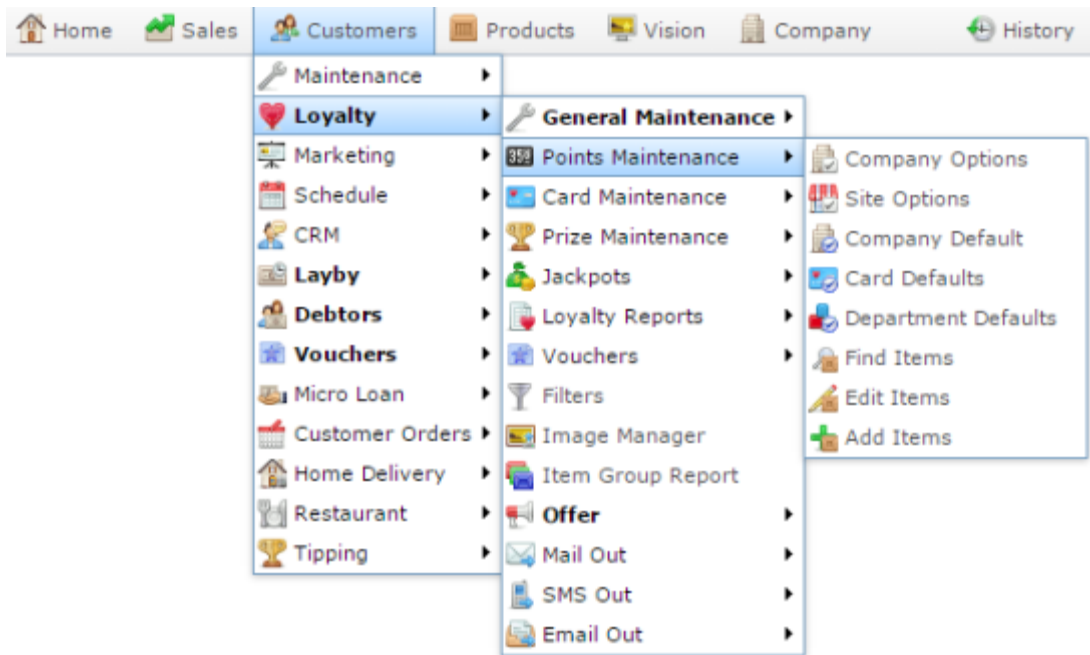
Card Type report

Use the Card Type report to view and edit loyalty card types.

Opening the Card Type report

To open the Card Type report:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Card Defaults.**



The Card Type report is displayed.

Card Type Report

Descr	Card Type	Points per \$ Sale	Redeem per \$	Disc On Sales	Points per Renew	Lost Card Points Penal	Default Active Flag	Allow Jackp Win for non Active Cards	Follow Active Flag	Allow Jackp Win for non Comp Cards	Key Tag	Expiry Type	Rollover Type	Linked Card
Defau	0	1	5	0	100	100	✓	✓		✓		Date c	Two S	
FTG	50	0	0	0	0	0	✓					No Expiry	Norm	
FTG5	51	0	0	0	0	0	✓					No Expiry	Norm	
Sport	1	1	5	10	0	0	✓	✓		✓		Anniv	Norm	
TSG	10	10	100	0	0	0	✓					No Expiry	Norm	
TSG1	11	20	100	0	0	0	✓					No Expiry	Norm	

Buttons: Add to Favourites, Create New Card Type

Card Type report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Create New Card Type	Press to create a new loyalty card type.

Report area

This area displays report information.

Field	Description
Description	Description of the loyalty card type.
Card Type	Unique code identifying the loyalty card type.
Points per \$ Sale	Number of loyalty points the card type accrues per dollar spent.
Redeem Points per \$	Number of loyalty points the card type redeems per dollar.
Discount on Sales	Discount the loyalty card type receives.
Points per Renewal	Number of points a card renewal costs this card type.
Lost Card Points Penalty	Number of points replacing a lost card costs this card type.
Default Active Flag	Whether the card type is activated when created by default.
Allow Jackpot Win for non Active Cards	Whether the card type allows cards that have not yet been activated to win jackpots.
Follow Active Flag	If selected, this card must be active to be eligible for points and loyalty rewards.

Field	Description
Allow Jackpot Win for non Complete Cards	Whether the card type allows cards that have not had all their details completed to win jackpots.
Key Tag	This field is no longer used.
Expiry Type	The type of expiry rules the card type uses.
Rollover Type	The type of points rollover the card type uses.
Linked Card	The card number of the master loyalty card that receives a portion of the points accrued by this card. For example, a sports team club card.

Managing loyalty groups

Create loyalty groups to provide jackpots and rewards to certain loyalty members. Loyalty members can belong to more than one group.

Also see:

- *Loyalty Group Maintenance screen* on page 190.
- *Loyalty Groups report* on page 199.
- *Loyalty Group Member report* on page 194


What you can do:

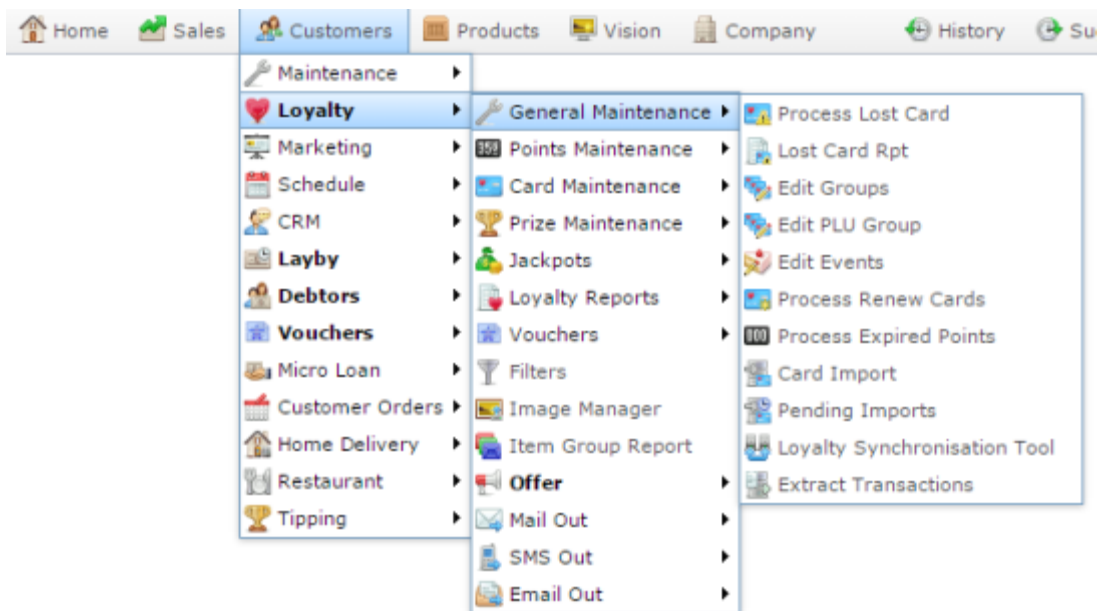
- *Creating a new loyalty group* on page 179.
- *Editing a loyalty group* on page 181.
- *Adding a loyalty member to a loyalty group* on page 186.
- *Removing a loyalty member from a loyalty group* on page 188.
- *Deleting a loyalty group* on page 184.

Creating a new loyalty group

Create new loyalty groups if you want to assign rewards to specific groups of loyalty members, or allocate some or all of their accrued points to a single linked loyalty account.

To create a loyalty group:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Edit Groups**.

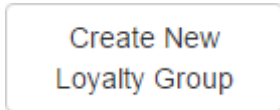


The Loyalty Group report is displayed.

Loyalty Group Report

Description	Loyalty Group	Points Multiplier	Bonus	Share %	Venue To Pay	Linked Card
Bob Email Test	666	1	0	0		
Bulk Test	97	1	0	0		
FLC	999	1	0	0		
FUSION LOYALTY	50	1	0	0		
QA Brook	3	1	0	0		
QA Football Club	2	1	2	10		27310029511
QA Loyalty Scheme	1	1	0	0		
SA Test	12345	1	0	0		
Test Email	100	1	0	0		
Tom Email Test	10	1	0	0		

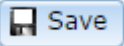
Buttons: Add to Favourites, Create New Loyalty Group



3. Press

The Loyalty Group Maintenance screen is displayed.

A screenshot of a web application window titled "Loyalty Group Maintenance". The window has a light blue header and a white body. At the top left, there is a tab labeled "Editing New Group". Below the tab, there are several input fields: "Group Id:" (empty), "Description:" (empty), "Points Multiplier:" (containing "1"), "Bonus Points:" (containing "0"), "Share Points %:" (containing "0"), "Venue To Pay Shared:" (a dropdown menu with "No" selected), and "Linked Card:" (empty). At the bottom right of the form area, there are three buttons: "Save" (with a floppy disk icon), "Reset" (with a circular arrow icon), and "Members" (with a group of people icon).

4. Type a unique code to identify the group in the **Group Id** field.
5. Type a description of the group in the **Description** field.
6. Press .


The loyalty group is created.

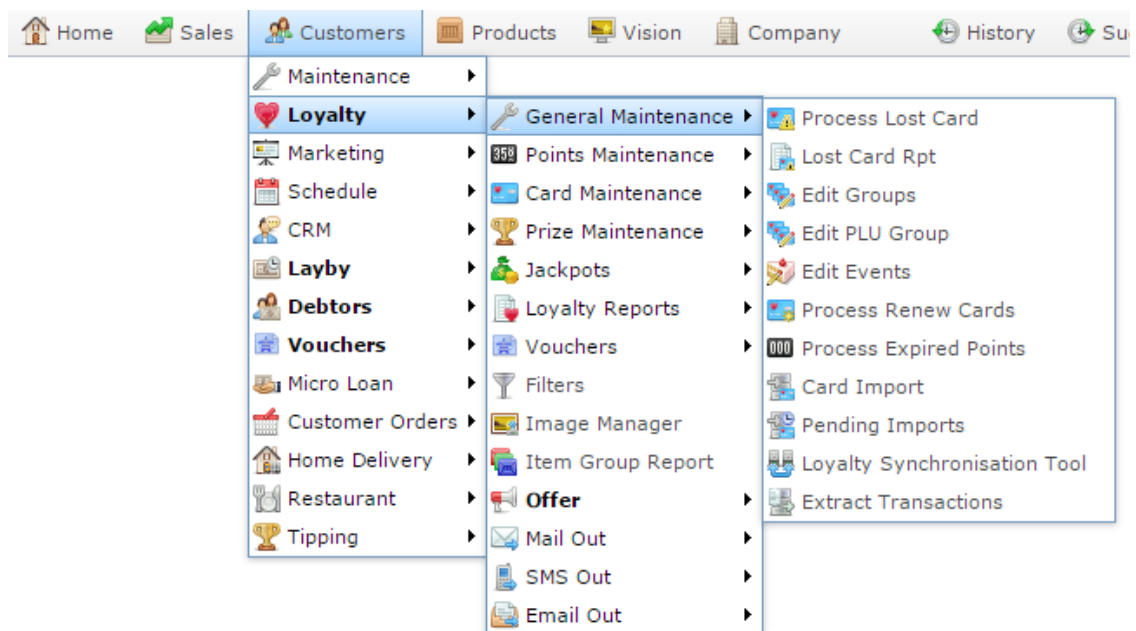
Editing a loyalty group

Edit a loyalty group to change the loyalty point bonus or multiplier, or add a linked card.

Note: You cannot add or remove loyalty members from a group using this screen. See *Adding a loyalty member to a loyalty group* on page 186. Also see *Removing a loyalty member from a loyalty group* on page 188.

To edit a loyalty group:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Edit Groups**.



The Loyalty Group report is displayed.

Loyalty Group Report

Description	Loyalty Group	Points Multiplier	Bonus	Share %	Venue To Pay	Linked Card
Bob Email Test	666	1	0	0		
Bulk Test	97	1	0	0		
FLC	999	1	0	0		
FUSION LOYALTY	50	1	0	0		
QA Brook	3	1	0	0		
QA Football Club	2	1	2	10		27310029511
QA Loyalty Scheme	1	1	0	0		
SA Test	12345	1	0	0		
Test Email	100	1	0	0		
Tom Email Test	10	1	0	0		

Add to Favourites

Create New Loyalty Group

3. Press the **Description** of the group you want to view.
A popup menu is displayed.

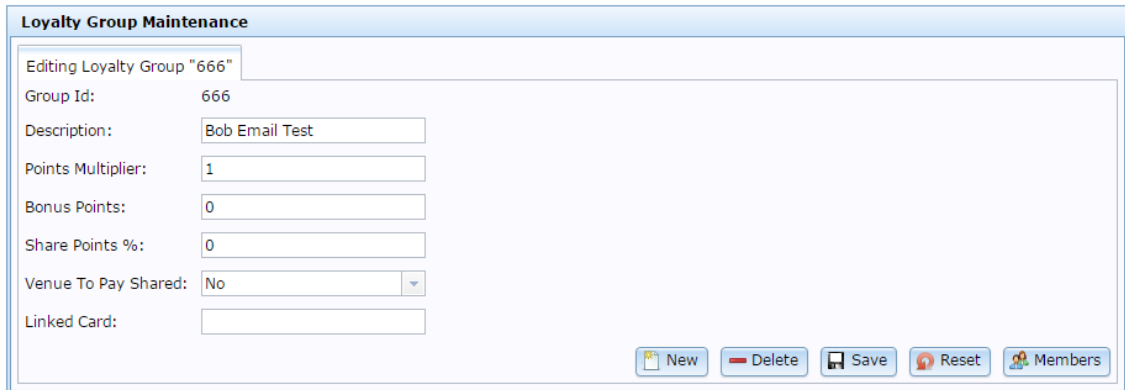
Loyalty Group Report

Description	Loyalty Group	Points Multiplier	Bonus	Share %	Venue To Pay	Linked Card
Bob Email Test	666	1	0	0		
Bulk Test	97	1	0	0		
FLC	999	1	0	0		
FLC			0	0		
FLC						
QA Brook	3	1	0	0		
QA Football Club	2	1	2	10		27310029511
QA Loyalty Scheme	1	1	0	0		
SA Test	12345	1	0	0		
Test Email	100	1	0	0		
Tom Email Test	10	1	0	0		

Add to Favourites

Create New Loyalty Group

4. Press **Edit Loyalty Group**.
The Loyalty Group Maintenance screen is displayed.



Loyalty Group Maintenance

Editing Loyalty Group "666"

Group Id: 666

Description: Bob Email Test

Points Multiplier: 1

Bonus Points: 0

Share Points %: 0

Venue To Pay Shared: No

Linked Card:

New Delete Save Reset Members

5. Make the required changes.

See *Loyalty Group Maintenance* screen on page 190.


6. Press  Save.

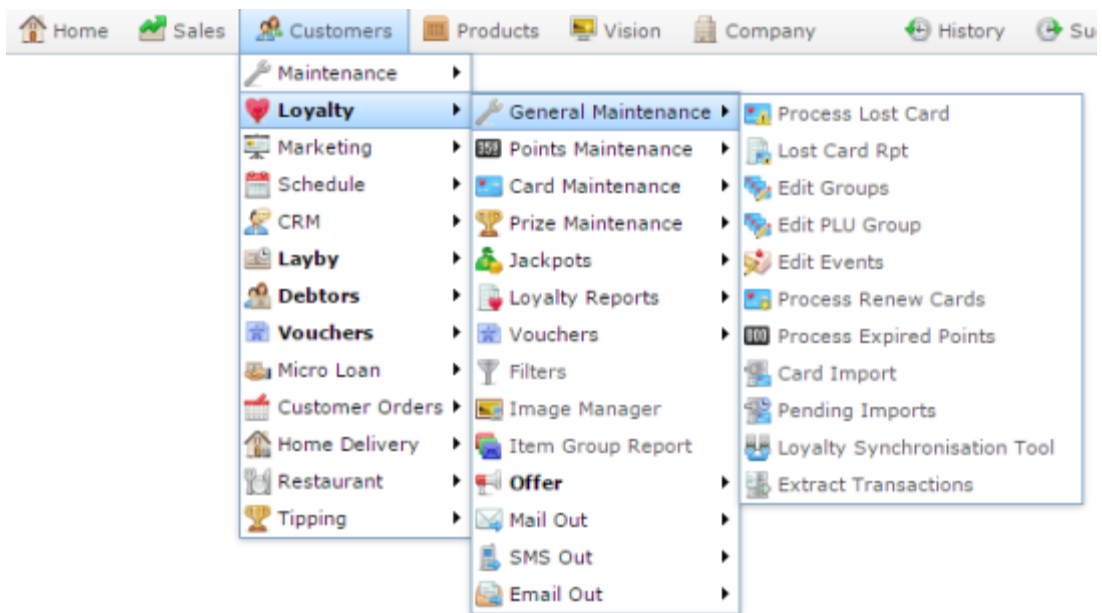
The loyalty group is saved.

Deleting a loyalty group

Delete a loyalty group if you want to remove it from the Portal.

To delete a loyalty group:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Edit Groups**.



The Loyalty Group report is displayed.

Loyalty Group Report

Description	Loyalty Group	Points Multiplier	Bonus	Share %	Venue To Pay	Linked Card
Bob Email Test	666	1	0	0		
Bulk Test	97	1	0	0		
ELC	999	1	0	0		
FLUSION LOYALTY	50	1	0	0		
QA Brook	3	1	0	0		
QA Football Club	2	1	2	10		27310029511
QA Loyalty Scheme	1	1	0	0		
SA Test	12345	1	0	0		
Test Email	100	1	0	0		
Tom Email Test	10	1	0	0		

Buttons: Add to Favourites, Create New Loyalty Group

3. Press the **Description** of the group you want to delete.

A popup menu is displayed.

Loyalty Group Report

Description	Loyalty Group	Points Multiplier	Bonus	Share %	Venue To Pay	Linked Card
Bob Email Test	666	1	0	0		
Bulk Test	97	1	0	0		
FLC	000	1	0	0		
FLC			0	0		
QA Brook	3	1	0	0		
QA Football Club	2	1	2	10		27310029511
QA Loyalty Scheme	1	1	0	0		
SA Test	12345	1	0	0		
Test Email	100	1	0	0		
Tom Email Test	10	1	0	0		

Add to Favourites

Create New Loyalty Group

4. Press **Edit Loyalty Group**.

The Loyalty Group Maintenance screen is displayed.

Loyalty Group Maintenance

Editing Loyalty Group "666"

Group Id: 666

Description:

Points Multiplier:

Bonus Points:

Share Points %:

Venue To Pay Shared:

Linked Card:

5. Press .

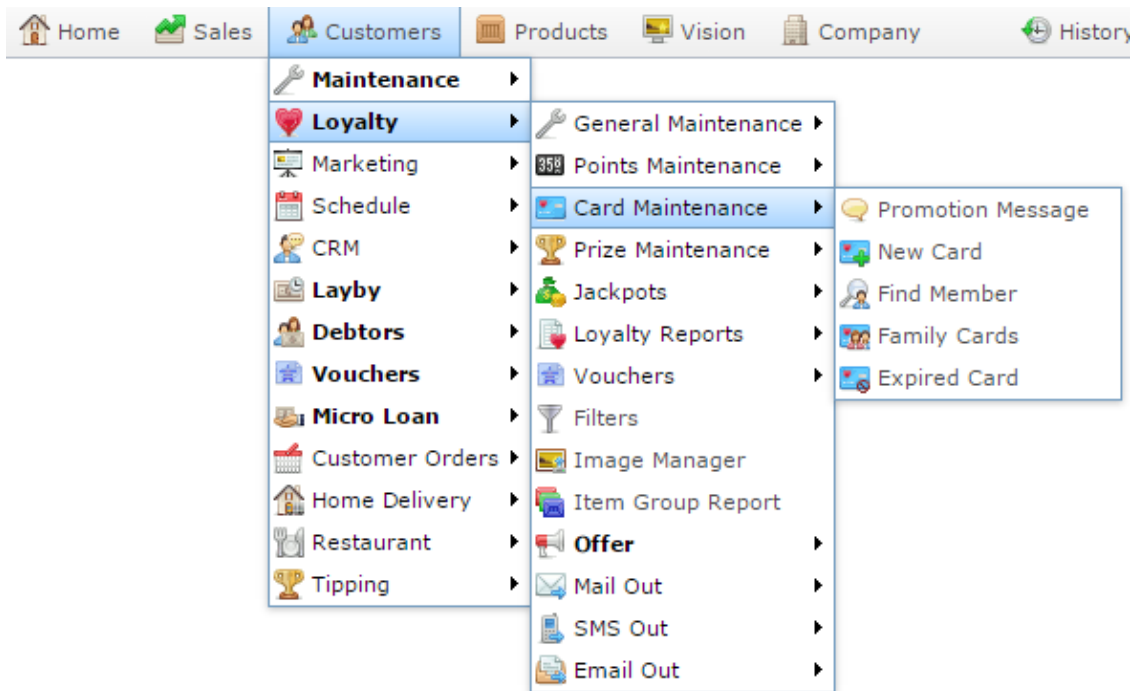
The loyalty group is deleted.

Adding a loyalty member to a loyalty group

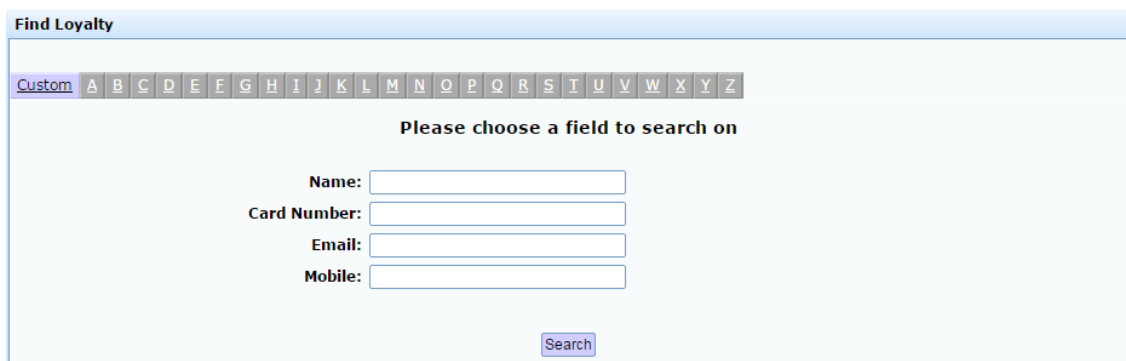
You can add loyalty members to loyalty groups to provide special loyalty rates or promotions, or link their loyalty points to a single card.

To add a loyalty member to a group:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.

A screenshot of the 'Find Loyalty' search screen. At the top, there is a 'Custom' dropdown and a row of letters from A to Z. Below this, the text 'Please choose a field to search on' is displayed. There are four input fields labeled 'Name:', 'Card Number:', 'Email:', and 'Mobile:'. A 'Search' button is located at the bottom right of the form.

3. Search for the loyalty member you want to edit.

See *Finding a loyalty member* on page 53.

The Member Maintenance screen is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Member Number: 10002199 Address: Referral:

Prefix: Other Referral:

Title: Suburb: Staff Name:

First Name *: State: Comments:

Surname *: Country:

Suffix: Post Code:

Contact Name:

Home Phone:

Work Phone:

Mobile:

Fax:

Email Address:

See Member Maintenance screen on page 106.

4. Press the Groups tab.

The Groups tab is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Groups:

Group Id	Group	Command
999	FLC	Remove From Group

5. Find the group you want to remove them from in the group grid.

6. Press **Remove From Group**.

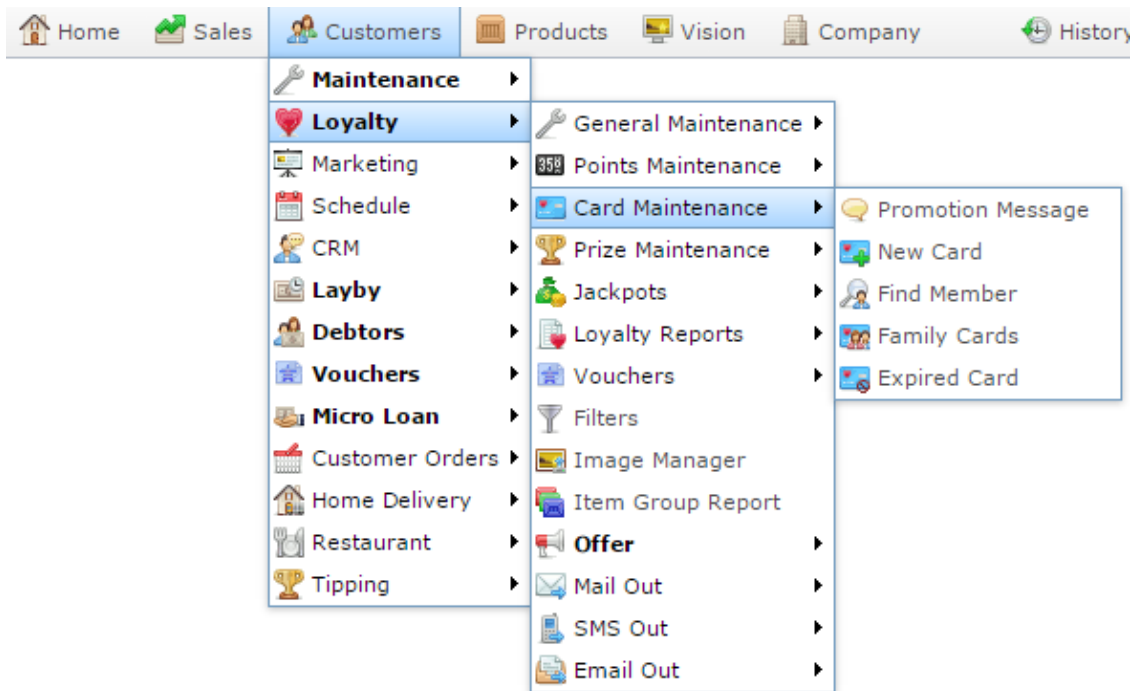
The loyalty member is removed from the loyalty group.

Removing a loyalty member from a loyalty group

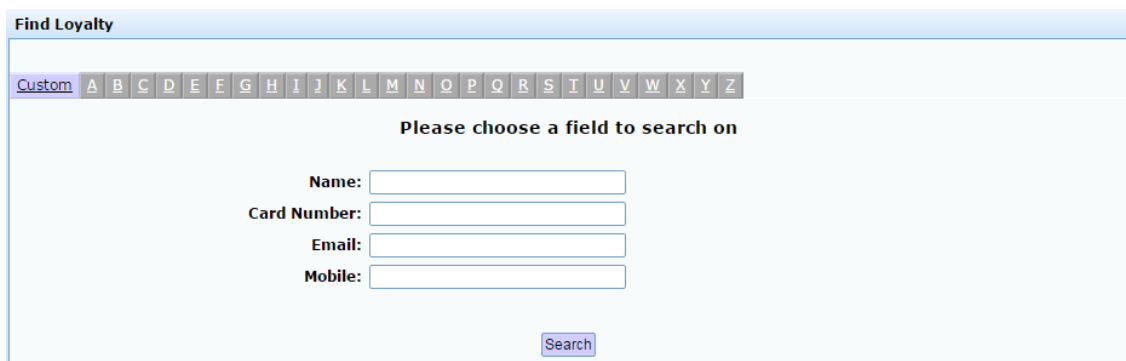
Remove a loyalty member from a group if you do not want them to receive the group's loyalty privileges.

To remove a loyalty member from a group:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Find Member**.



The Find Loyalty screen is displayed.

A screenshot of the 'Find Loyalty' search screen. At the top, there is a 'Custom' dropdown menu followed by a row of letters from A to Z. Below this, the text 'Please choose a field to search on' is displayed. There are four input fields labeled 'Name:', 'Card Number:', 'Email:', and 'Mobile:'. A 'Search' button is located at the bottom right of the form.

3. Search for the loyalty member you want to edit.

See *Finding a loyalty member* on page 53.

The Member Maintenance screen is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Member Number: 10002199 Address: Referral:

Prefix: Other Referral:

Title: Suburb: Staff Name:

First Name *: State: Comments:

Surname *: Country:

Suffix: Post Code:

Contact Name:

Home Phone:

Work Phone:

Mobile:

Fax:

Email Address:

See Member Maintenance screen on page 106.

4. Press the Groups tab.

The Groups tab is displayed.

Member Maintenance - Example company

Member Name: Xanatos,Xavier
 Member Number: 10002199 [2731444304495] * indicates compulsory field

Groups:

Group Id	Group	Command
999	FLC	Remove From Group

5. Select the group you want to add the loyalty member to in the **Groups** drop-down field.

6. Press .

The loyalty member is added to the loyalty group.


Loyalty Group Maintenance screen

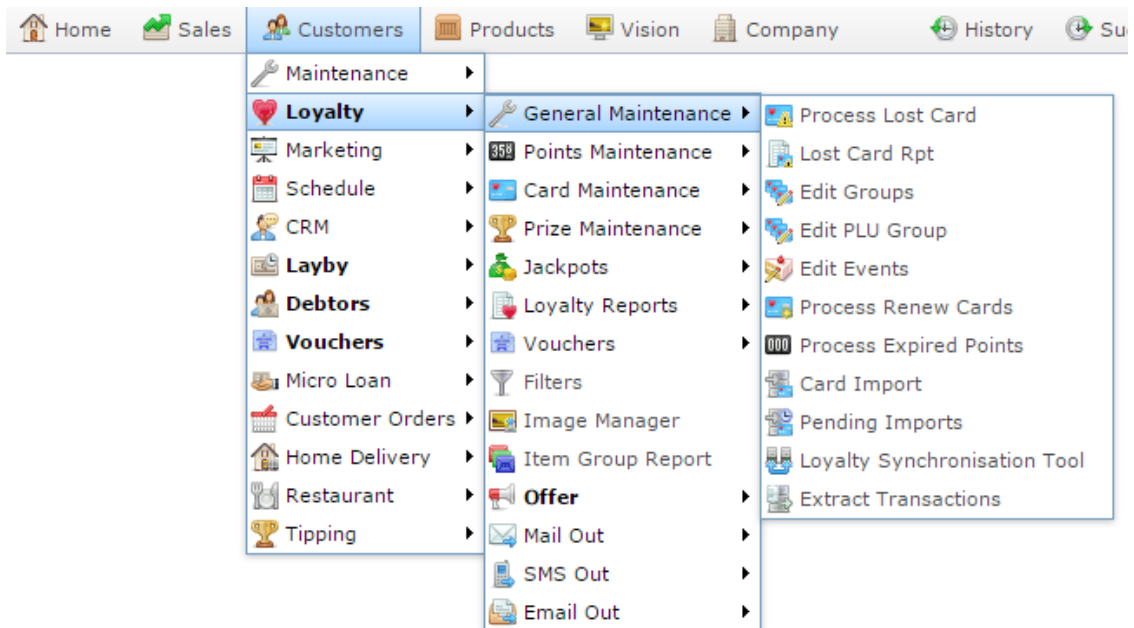
Use this screen to create and edit loyalty groups.

Note: You cannot add or remove loyalty members from a group using this screen. To add or remove loyalty members, use the Groups tab of the Member Maintenance screen. See *Member Maintenance screen* on page 106.

Opening the Loyalty Group Maintenance screen

To open the Loyalty Group Maintenance screen:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Edit Groups**.



The Loyalty Groups report is displayed.

Loyalty Group Report

Description	Loyalty Group	Points Multiplier	Bonus	Share %	Venue To Pay	Linked Card
Bob Email Test	666	1	0	0		
Bulk Test	97	1	0	0		
FLC	999	1	0	0		
FUSION LOYALTY	50	1	0	0		
QA Brook	3	1	0	0		
QA Football Club	2	1	2	10		27310029511
QA Loyalty Scheme	1	1	0	0		
SA Test	12345	1	0	0		
Test Email	100	1	0	0		
Tom Email Test	10	1	0	0		

Add to Favourites

Create New Loyalty Group

2. Press the **Description** of the group you want to edit.

A popup menu is displayed.

Loyalty Group Report

Description	Loyalty Group	Points Multiplier	Bonus	Share %	Venue To Pay	Linked Card
Bob Email Test	666	1	0	0		
Bulk Test	97	1	0	0		
FLC	999	1	0	0		
FLC			0	0		
FLC			0	0		
QA Brook	3	1	0	0		
QA Football Club	2	1	2	10		27310029511
QA Loyalty Scheme	1	1	0	0		
SA Test	12345	1	0	0		
Test Email	100	1	0	0		
Tom Email Test	10	1	0	0		

Add to Favourites

Create New Loyalty Group

3. Press **Edit Loyalty Group**.

The Loyalty Group Maintenance screen is displayed.

Managing loyalty groups






The screenshot shows a web application window titled "Loyalty Group Maintenance". The window contains a form for editing a loyalty group. The form fields are as follows:

- Editing Loyalty Group "666"
- Group Id: 666
- Description: Bob Email Test
- Points Multiplier: 1
- Bonus Points: 0
- Share Points %: 0
- Venue To Pay Shared: No (dropdown menu)
- Linked Card: (empty text box)

At the bottom right of the form, there are five buttons: "New" (with a plus icon), "Delete" (with a minus icon), "Save" (with a floppy disk icon), "Reset" (with a circular arrow icon), and "Members" (with a group of people icon).

Loyalty Group Maintenance screen key fields and buttons

Field	Description
Group Id	Unique code identifying the loyalty group.
Description	Description of the loyalty group.
Points Multiplier	The number to multiply all accrued points by. For example, if members of this loyalty group earn triple points, the points multiplier is 3.
Bonus Points	The bonus points accrued each transaction.
Share Points %	The percentage of accrued points to be shared with a loyalty account linked to the group.

Field	Description
Venue to Pay Shared	<p>Select:</p> <ul style="list-style-type: none"> ▪ Yes to pay the linked account's percentage on top of the loyalty member's points. For example, if the Share Points % is 10 and the loyalty member accrues 100 points, an additional 10 points is assigned to the linked account. ▪ No to deduct the link account's percentage from the loyalty member's points. For example, if the Share Points % is 10 and the loyalty member accrues 100 points, 10 points is deducted from the loyalty member's accrual and assigned to the linked account. The loyalty member receives 90 points.
Linked Card	The loyalty account that all shared points are assigned to.
 New	Create a new loyalty group.
 Delete	Delete this loyalty group.
 Save	Save any changes made to the loyalty group.
 Reset	Undo any changes made since the last save.
 Members	View a list of members that belong to this group.
<p>Note: You cannot add or remove loyalty members from a group using this report. See <i>Adding a loyalty member to a loyalty group</i> on page 186. Also see <i>Removing a loyalty member from a loyalty group</i> on page 188.</p>	


Loyalty Group Member report

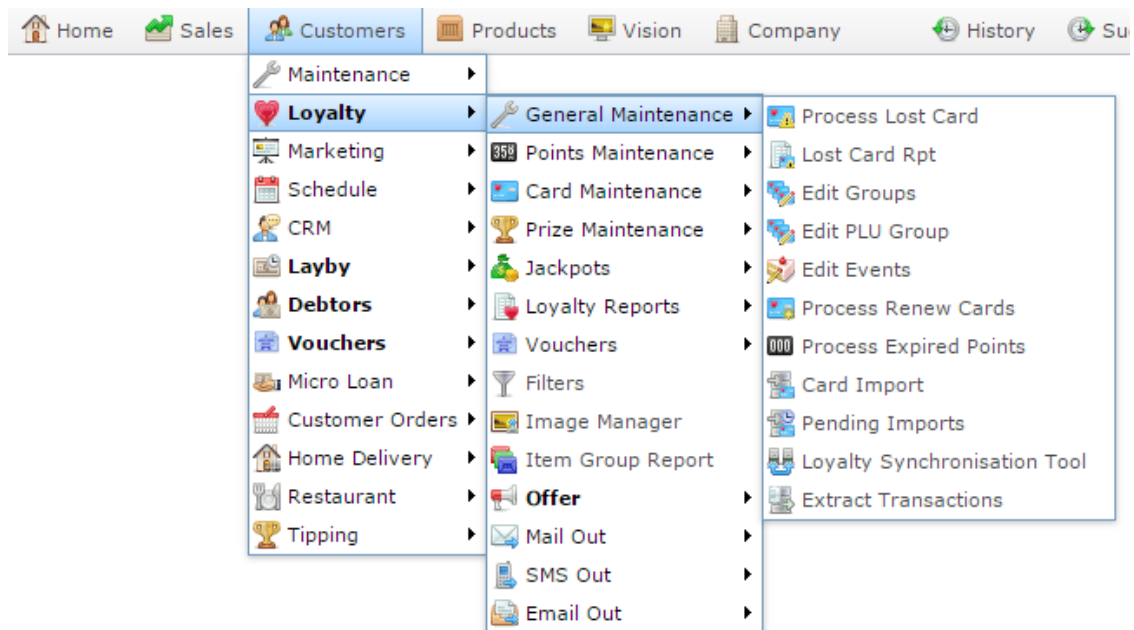
Use the Loyalty Group Member report to view a list of loyalty members that belong to a particular group.

Note: You cannot add or remove loyalty members from a group using this report. See *Adding a loyalty member to a loyalty group* on page 186. Also see *Removing a loyalty member from a loyalty group* on page 188.

Opening the Loyalty Group Member report

To open the Loyalty Group Member report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Edit Groups**.



The Loyalty Group report is displayed.

Loyalty Group Report

Description	Loyalty Group	Points Multiplier	Bonus	Share %	Venue To Pay	Linked Card
Bob Email Test	666	1	0	0		
Bulk Test	97	1	0	0		
FLC	999	1	0	0		
FUSION LOYALTY	50	1	0	0		
QA Brook	3	1	0	0		
QA Football Club	2	1	2	10		27310029511
QA Loyalty Scheme	1	1	0	0		
SA Test	12345	1	0	0		
Test Email	100	1	0	0		
Tom Email Test	10	1	0	0		

Add to Favourites

Create New Loyalty Group

3. Press the **Description** of the group you want to view.

A popup menu is displayed.

Loyalty Group Report

Description	Loyalty Group	Points Multiplier	Bonus	Share %	Venue To Pay	Linked Card
Bob Email Test	666	1	0	0		
Bulk Test	97	1	0	0		
FLC	999	1	0	0		
FLC	999	1	0	0		
FLC	999	1	0	0		
QA Brook	3	1	0	0		
QA Football Club	2	1	2	10		27310029511
QA Loyalty Scheme	1	1	0	0		
SA Test	12345	1	0	0		
Test Email	100	1	0	0		
Tom Email Test	10	1	0	0		

Add to Favourites

Create New Loyalty Group

4. Press **Display Members for Loyalty Group**.

The Loyalty Group Member report is displayed.

Loyalty Group Member Report : FLC [999]

Name	Card #	Phone	Mobile	Occupation	Email	Allow SMS	Allow Email
Celis, Marjorie	6666666666	7777788		Branch Manager	marjorieceli	✓	✓
Ayala, Mark	8888888888			Manager		✓	✓
Lopez, Aida	9999999999			HR Staff		✓	✓

Add to Favourites

Loyalty Group Member report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name / Card / Customer	Name of the loyalty member or customer.
Card # / Card	The card number identifying the loyalty member.
Phone	The loyalty member's landline phone number.
Mobile	The loyalty member's mobile phone number.
Occupation	The loyalty member's occupation. <div data-bbox="651 1478 1345 1628" style="border: 1px solid #0056b3; padding: 5px;"> <p>Note: This field may be different depending on your configuration. See the Occupation field in the Card tab of Loyalty Maintenance. See <i>Member Maintenance screen</i> on page 106.</p> </div>
Email	The loyalty member's email address.
Allow SMS	Whether the loyalty member has agreed to receive SMS mail outs.

Field	Description
Allow Email	Whether the loyalty member has agreed to receive email mail outs.


Loyalty Groups report

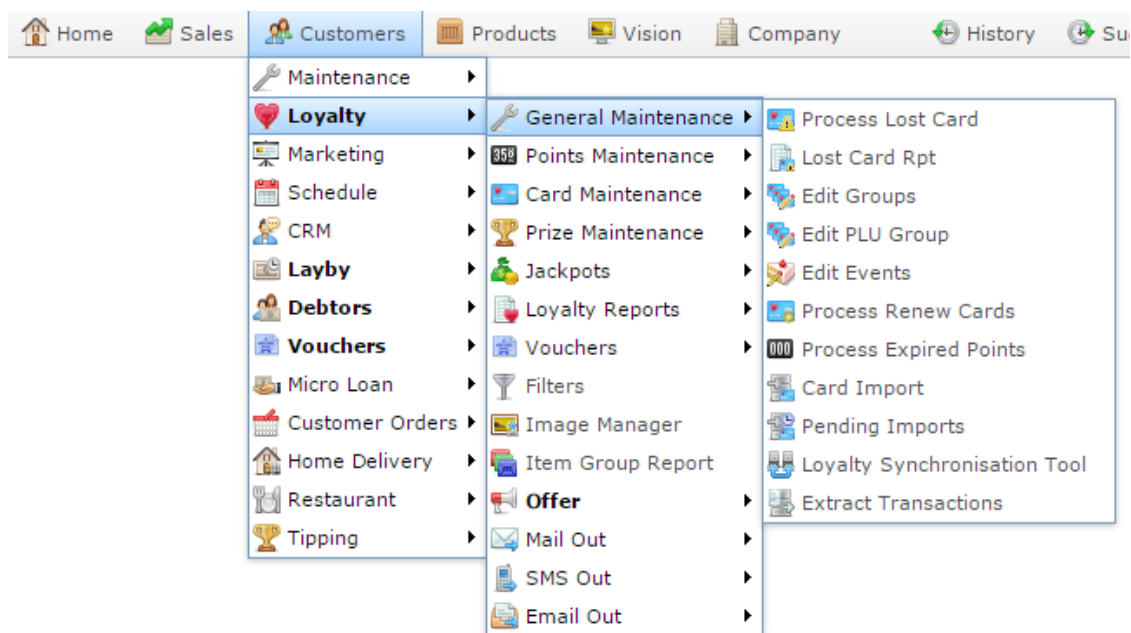
Use the Loyalty Groups report to view and edit your groups of loyalty members.

See *Loyalty Group Member report* on page 194.

Opening the Loyalty Groups report

To open the Loyalty Groups report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Edit Groups**.



The Loyalty Groups report is displayed.

Loyalty Group Report

Description	Loyalty Group	Points Multiplier	Bonus	Share %	Venue To Pay	Linked Card
Bob Email Test	666	1	0	0		
Bulk Test	97	1	0	0		
FLC	999	1	0	0		
FUSION LOYALTY	50	1	0	0		
QA Brook	3	1	0	0		
QA Football Club	2	1	2	10		27310029511
QA Loyalty Scheme	1	1	0	0		
SA Test	12345	1	0	0		
Test Email	100	1	0	0		
Tom Email Test	10	1	0	0		

Add to Favourites

Create New Loyalty Group

Loyalty Groups report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Create New Loyalty Group	Press to create a new loyalty group.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the loyalty group.
Loyalty Group	Unique code identifying the loyalty group.
Points Multiplier	<p>The number that all loyalty points accrued by members of this group are multiplied by.</p> <p>For example, if all loyalty points are doubled, the multiplier is 2.</p>
Bonus	The bonus points that this loyalty group offers.
Share %	<p>The percentage of points that this loyalty group sends to the Linked Card.</p> <p>For example, a football club membership may send 10% of all points accrued by its members to the club.</p>

Field	Description
Venue to Pay	<p>Indicates that the loyalty points received by the linked card are not deducted from the loyalty member who accrued them.</p> <p>For example, if the share is 10%, and a loyalty member accrues 100 loyalty points, then:</p> <ul style="list-style-type: none">▪ If the Venue To Pay is true, the loyalty member receives 100 loyalty points, and the linked card receives 10 loyalty points from the company where the transaction occurred.▪ If the Venue To Pay is false, then the 10 loyalty points accrued by the linked card are deducted from the loyalty points accrued by the loyalty member. The loyalty member then receives only 90 loyalty points.
Linked Card	The card to pay the shared points into, if applicable.

Managing jackpots and prizes

You can create jackpots and prizes that are awarded to loyalty customers. Jackpots accrue loyalty points from eligible transactions that are bestowed upon a transaction that occurs with a randomly-selected number. Prizes award loyalty points to one or more transactions selected randomly from a set period.

Also see:

- *Prizes report.*
- *Active Jackpot Details report* on page 228.
- *Jackpot To Activate report* on page 225.
- *Loyalty Jackpot report* on page 231.
- *Prizes report*
- *Jackpot Banner Maintenance screen* on page 253.
- *Loyalty Prize Maintenance screen* on page 239.
- *Online Loyalty Promotion Message Maintenance screen* on page 257.


What you can do:

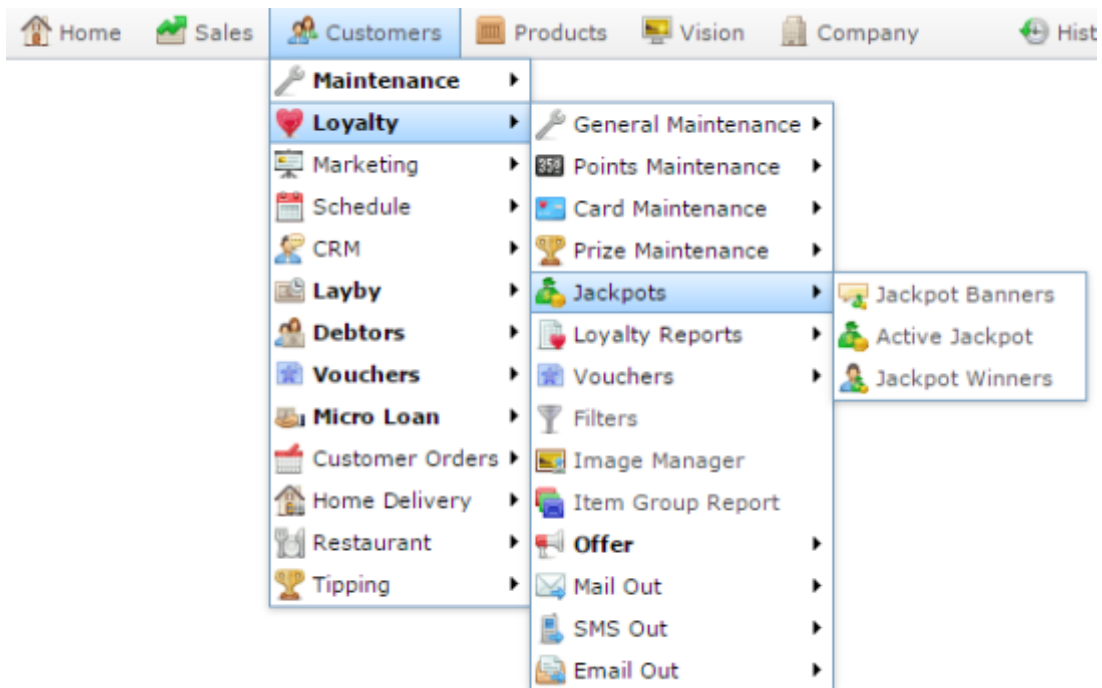
- *Creating a new jackpot banner* on page 205.
- *Editing a jackpot banner* on page 208.
- *Disabling a jackpot banner* on page 210.
- *Deleting a jackpot banner* on page 212.
- *Creating a new jackpot prize* on page 214.
- *Editing a jackpot prize* on page 218.
- *Activating a jackpot* on page 216.
- *Disabling a jackpot prize* on page 220.
- *Deleting a jackpot prize* on page 223.

Creating a new jackpot banner

Create a new jackpot banner if you want to display something on a terminal to your customers.

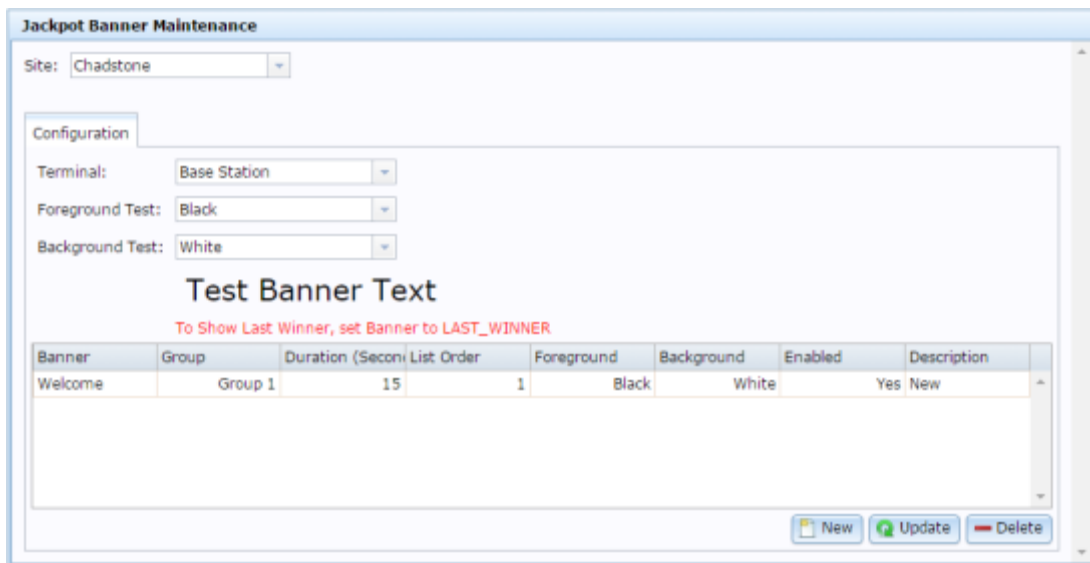
To create a new jackpot banner:


1. Press  Customers.
2. Press **Loyalty > Jackpots > Jackpot Banners**.

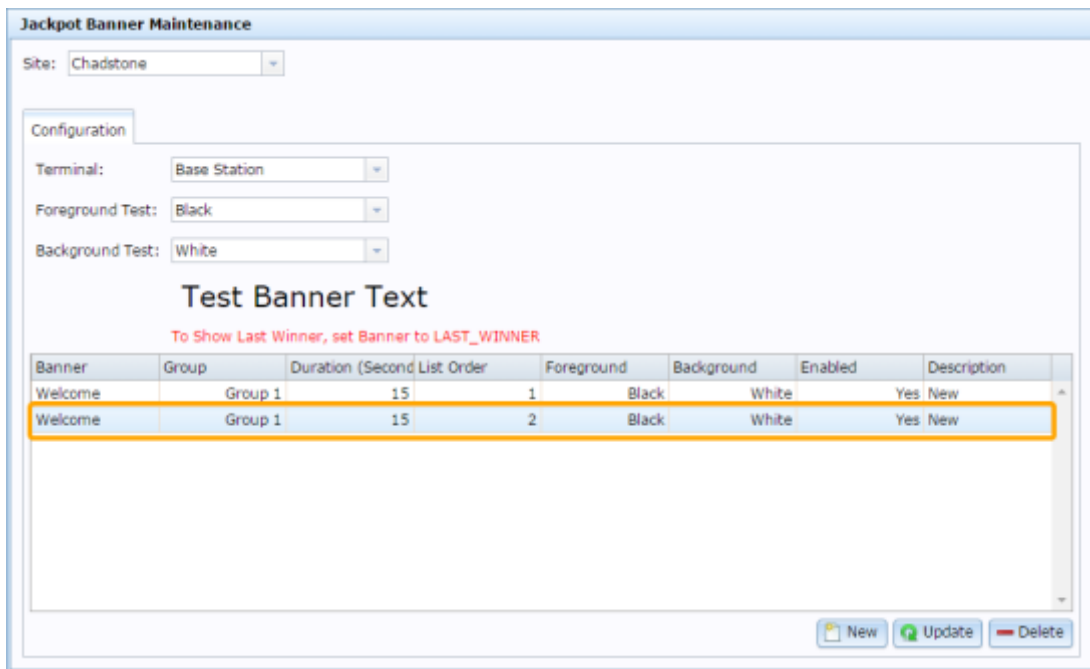


The Jackpot Banner Maintenance screen is displayed.

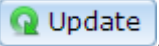
Managing jackpots and prizes



3. Press  **New**.
A new entry is added to the banner grid.
4. Select the new banner entry.



5. Type the text you want to appear in the **Banner** field.
6. Type the number of seconds you want the banner to display for in the **Duration** field.
7. Type the order the banner should display in the sequence in the **List Order** field.
8. Select the colour of the text and background in the **Foreground** and **Background** fields.


9. Make sure the **Enabled** field is set to **Yes**.
10. Type a description for your banner.
11. Press .

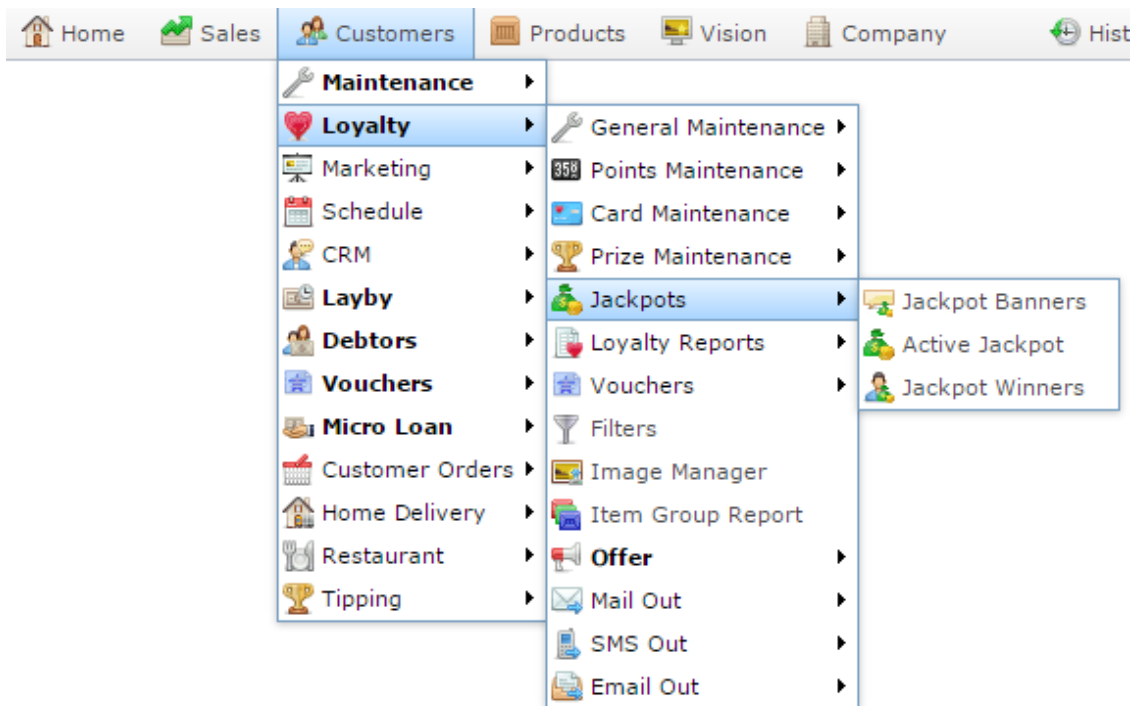
The banner is created.

Editing a jackpot banner

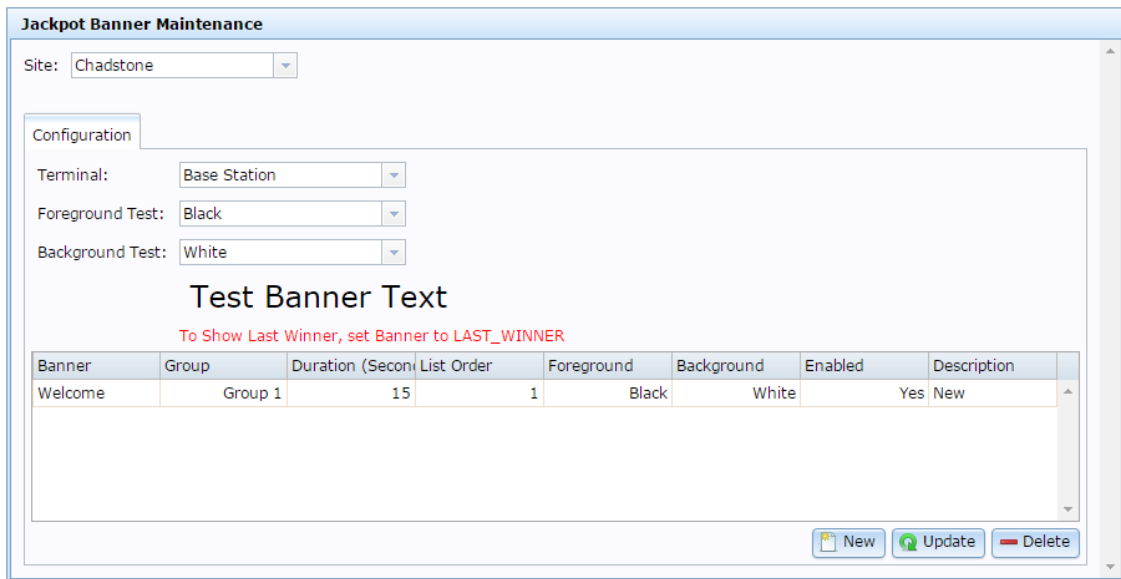
Edit a jackpot banner to change the text it displays, the order or duration it is displayed in, the colours it is displayed in, or disable it.

To edit a jackpot banner:

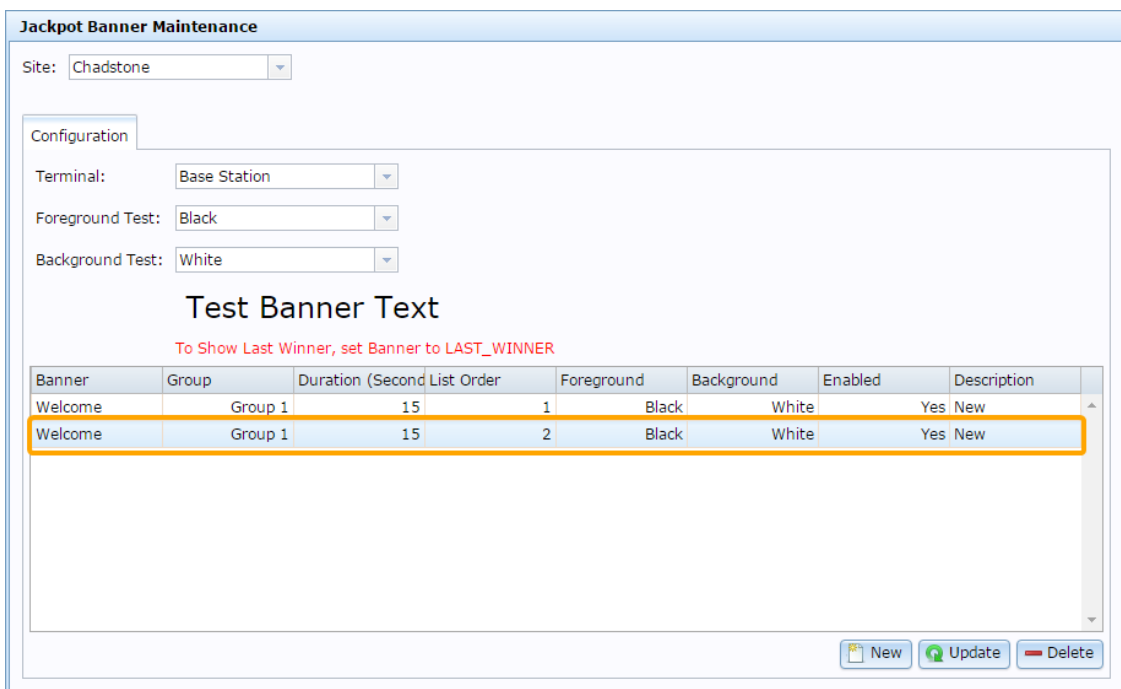
1. Press  Customers.
2. Press **Loyalty > Jackpots > Jackpot Banners**.



The Jackpot Banner Maintenance screen is displayed.



3. Select the banner entry you want to edit.



4. Make the required changes

See *Jackpot Banner Maintenance* screen on page 253.


5. Press .

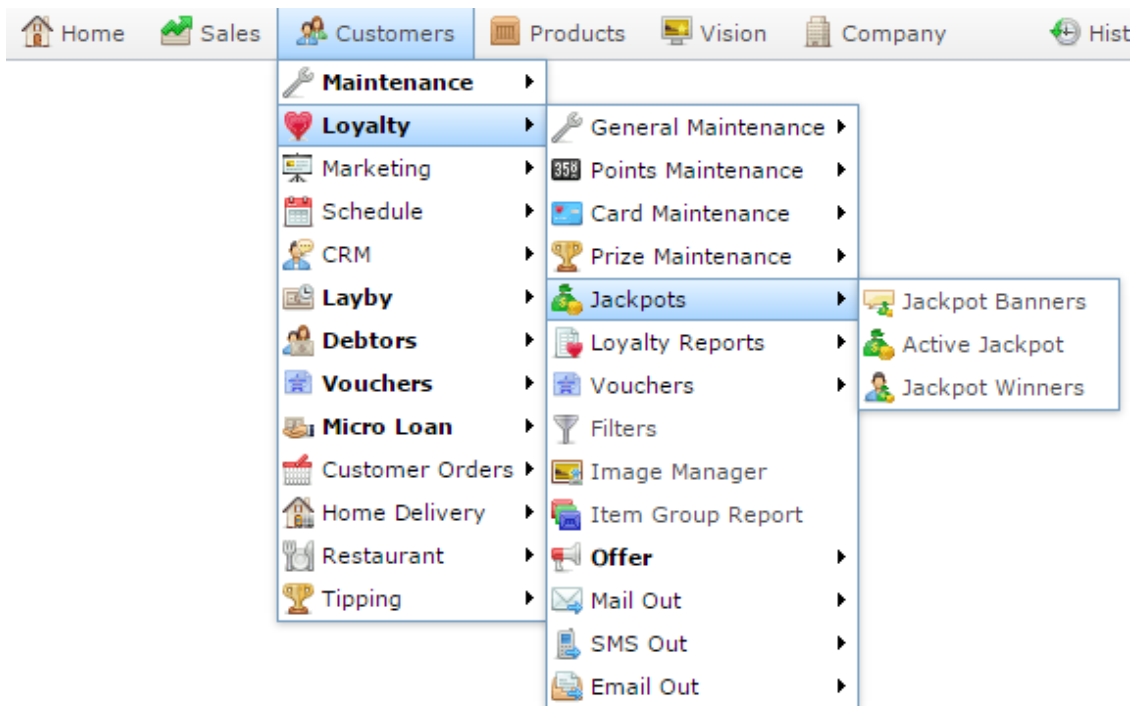
The banner is saved.

Disabling a jackpot banner

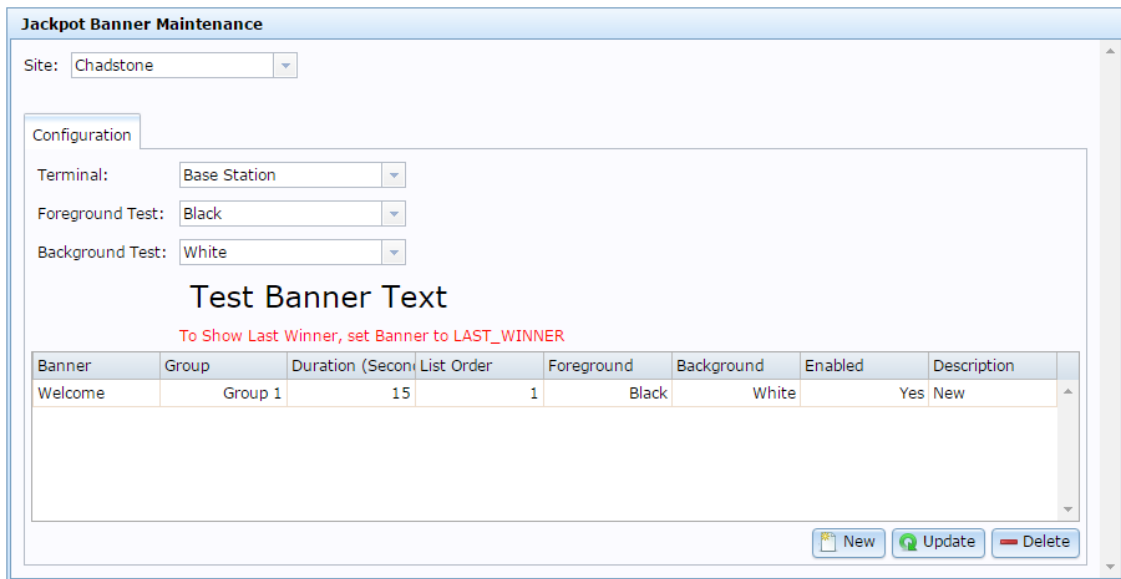
Disable a jackpot banner to stop it being displayed to customers without deleting it from the Portal.

To disable a jackpot banner:

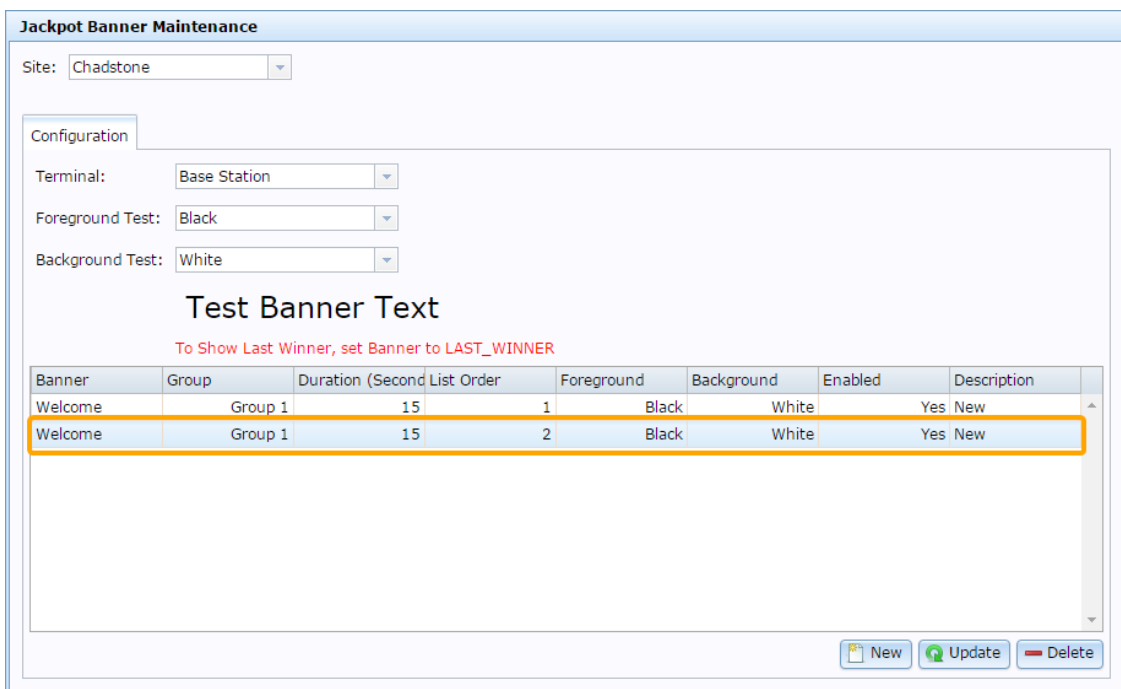
1. Press  Customers.
2. Press **Loyalty > Jackpots > Jackpot Banners**.



The Jackpot Banner Maintenance screen is displayed.



3. Select the banner entry you want to disable.



4. Select **No** in the **Enabled** field.

See *Jackpot Banner Maintenance* screen on page 253.

5. Press  **Update**.

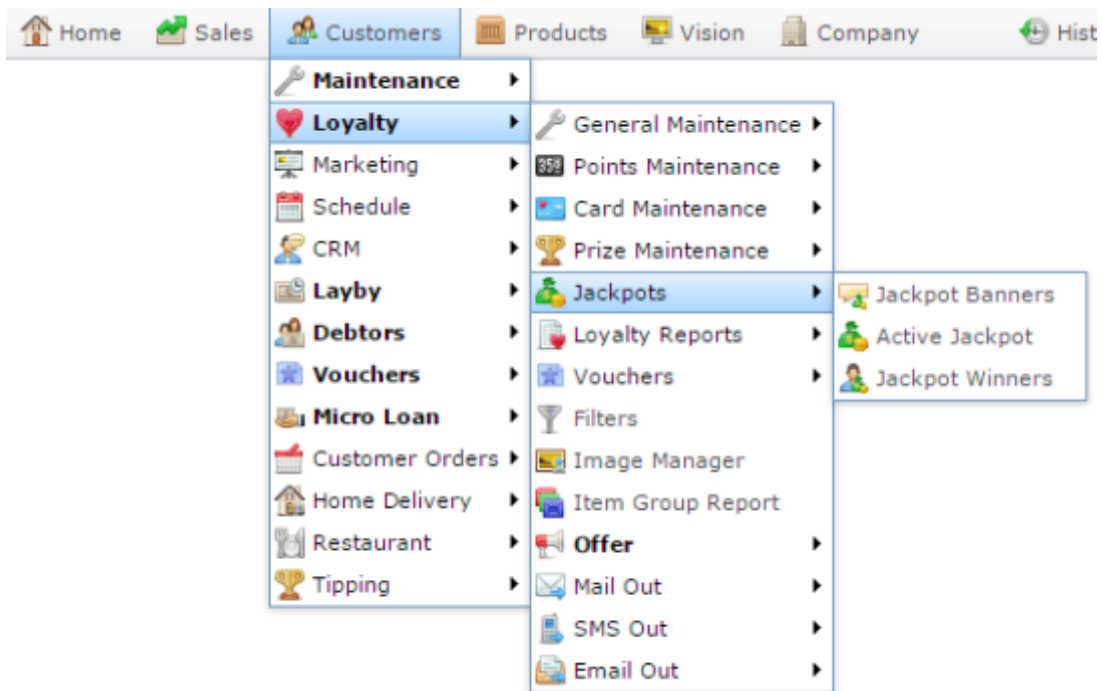
The banner is disabled.

Deleting a jackpot banner

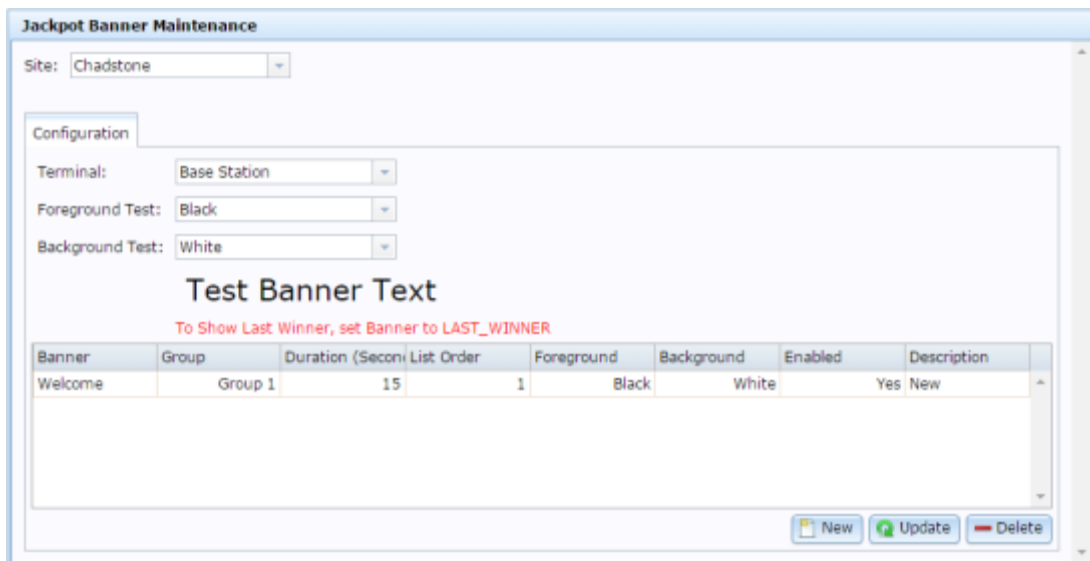
Delete a jackpot banner to remove it from the Portal.

To delete a jackpot banner:

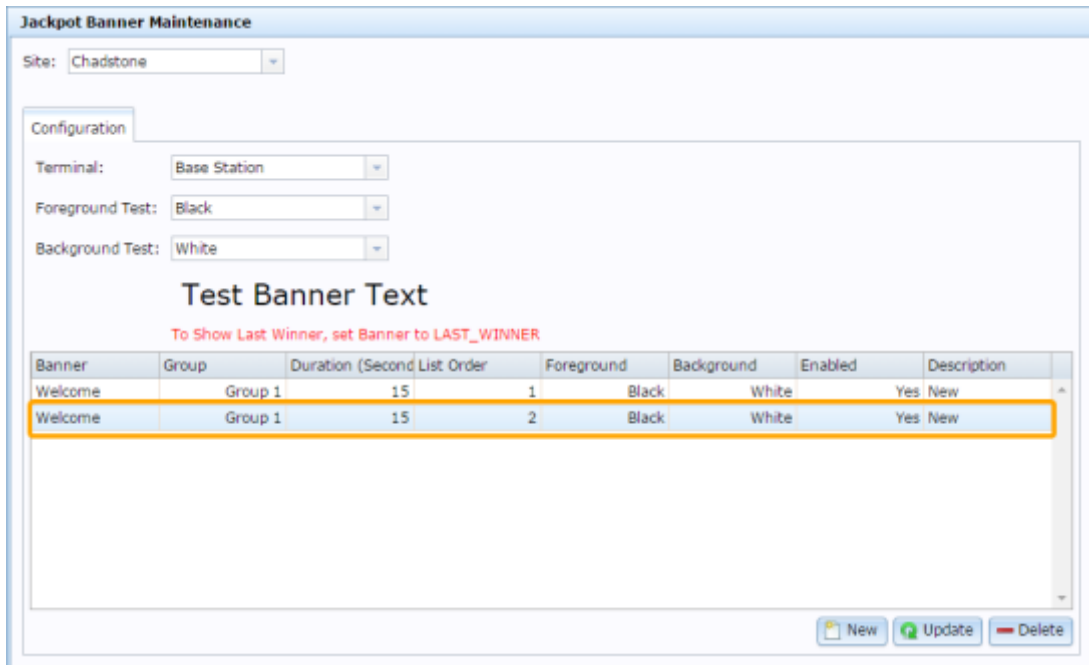
1. Press  Customers.
2. Press **Loyalty > Jackpots > Jackpot Banners**.



The Jackpot Banner Maintenance screen is displayed.



3. Select the banner entry you want to delete.




4. Press  Delete .

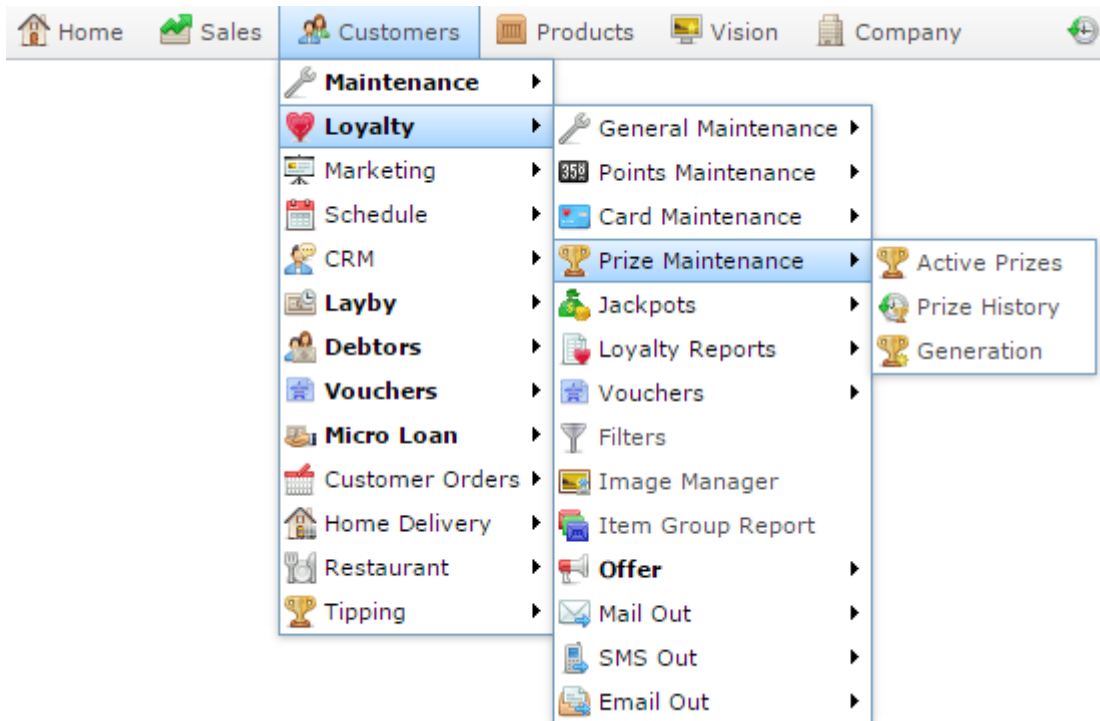
The banner is deleted.

Creating a new jackpot prize

Create a new jackpot prize to award loyalty members a jackpot based on specific rules.

To create a new jackpot prize:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Prize Maintenance > Active Prizes**.



The Active Jackpot Details report is displayed.

Report - Active Jackpot Details

Description	Ident	Company	Site	Start Date	End Date	Jackpot	Processed
Create New Loyalty Prize		Example Company	All				
Bob Test	3	All Companies	All	06-Nov-2010	31-Jul-2012		

Site: Chadstone

Add to Favourites

3. Press the **Create New Loyalty Prize**.

The Loyalty Prize Maintenance screen is displayed.

Loyalty Prize Maintenance For Example Company

Company:

Site:

Prize Number:

Prize Description:

Settings | Control | Filters | Prize | Jackpot Control

Start Date:

End Date:

Number Of Prizes:

Period:

Instant Prize:

Prize Hour:

Prize Day:

Start Hour:

End Hour:

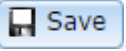
Site Exceptions (eg 1,2,3):

Prize Message:

Lottery Number:

Enabled:


Processed:

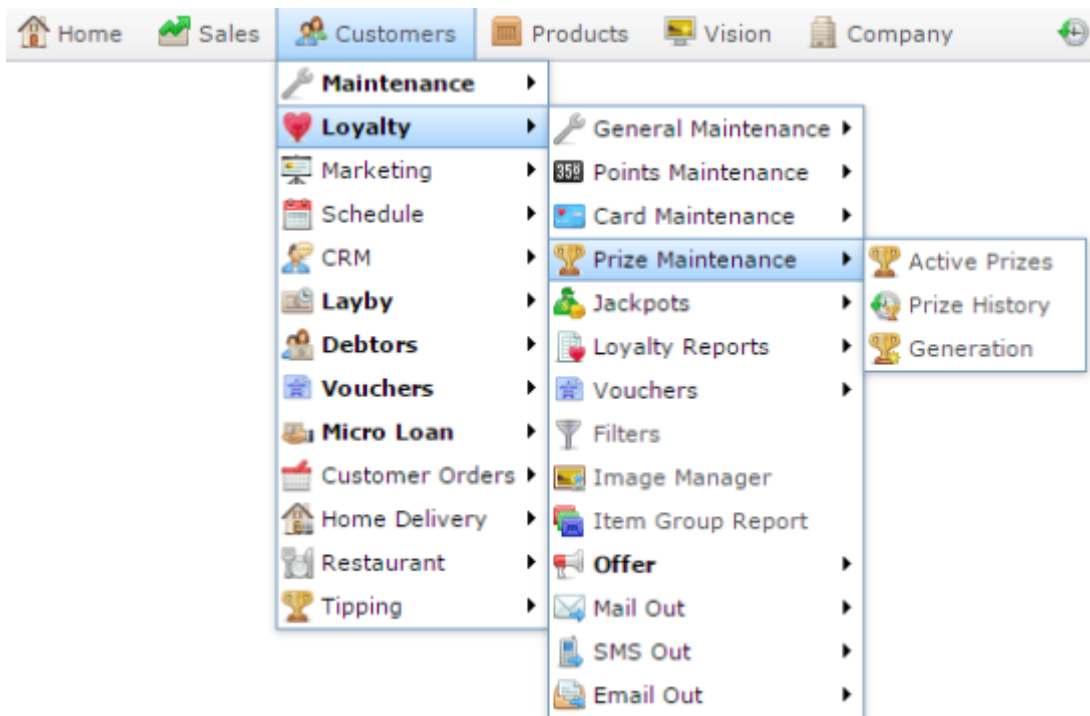
4. Select the settings you want for your prize.
See *Loyalty Prize Maintenance* screen on page 239.
5. Press  Save .
The jackpot prize is created.

Activating a jackpot

Activate a jackpot to start collect points from transactions for their reward pool.

To activate a jackpot:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Prize Maintenance > Generation**.



The Jackpot To Activate report is displayed.



3. Press the **Description** of the jackpot you want to activate.

A popup menu is displayed.

Jackpot - Jackpot to Activate

Description	Ident	Company	Site	Start Date	End Date	Jackpot	Processed
Bob	Process Loyalty Prize			06-Nov-2010	31-Jul-2012		
	Download Loyalty Prize by Transaction						
	Download Loyalty Prize by Item						

Site
All

Add to Favourites


4. Press **Process Loyalty Prize**.

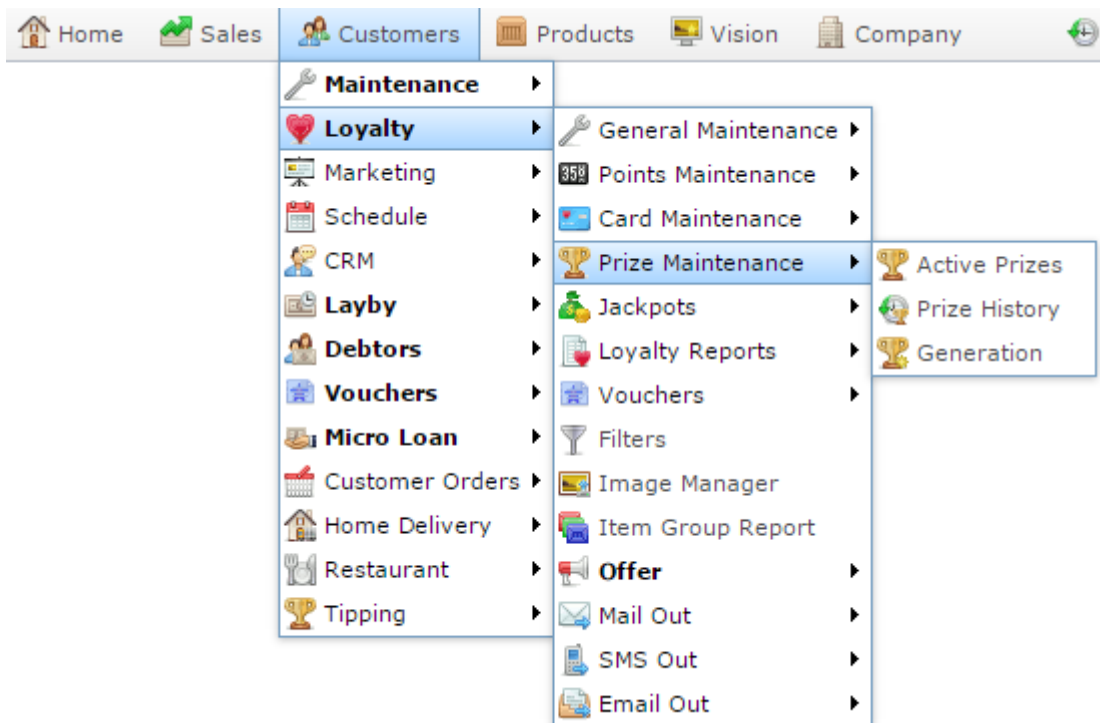
The jackpot is activated.

Editing a jackpot prize

Edit a jackpot prize to change the settings of how or when the prize is awarded.

To edit a jackpot prize:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Prize Maintenance > Active Prizes**.



The Active Jackpot Details report is displayed.



3. Press the **Description** of the prize you want to edit.

Report - Active Jackpot Details

Description	Ident	Company	Site	Start Date	End Date	Jackpot	Processed
Create New Loyalty Prize		Example Company	All				
Bob Test	3	All Companies	All	06-Nov-2010	31-Jul-2012		

Site
Chadstone

Add to Favourites

The Loyalty Prize Maintenance screen is displayed.

Loyalty Prize Maintenance For All Companies

Company:

Site:

Prize Number:

Prize Description: Bob Test

Settings | Control | Filters | Prize | Jackpot Control

Start Date: 6/11/2010
 End Date: 31/07/2012
 Number Of Prizes: 1
 Period:
 Instant Prize:
 Prize Hour:
 Prize Day:
 Start Hour:
 End Hour:
 Site Exceptions (eg 1,2,3):
 Prize Message:
 Lottery Number:
 Enabled:
 Processed:

4. Make the required changes.

See *Loyalty Prize Maintenance* screen on page 239.


5. Press .

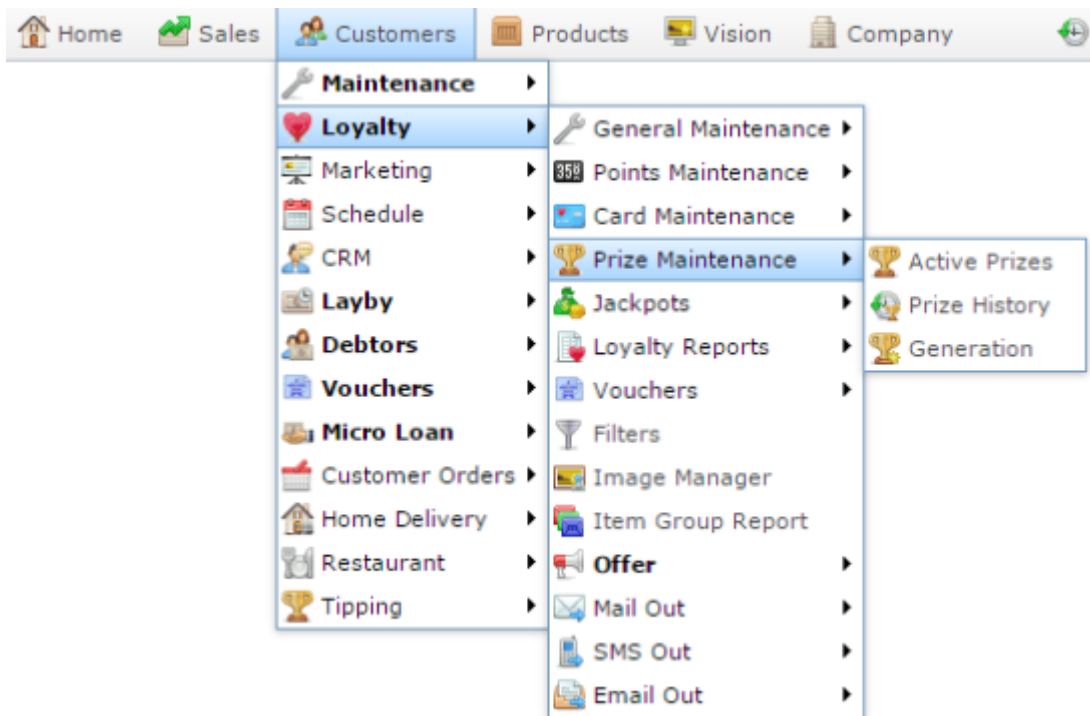
The jackpot prize is saved.

Disabling a jackpot prize

Disable a jackpot prize to prevent it being awarded in your Portal.

To disable a jackpot prize:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Prize Maintenance > Active Prizes**.



The Active Jackpot Details report is displayed.

Report - Active Jackpot Details

Description	Ident	Company	Site	Start Date	End Date	Jackpot	Processed
Create New Loyalty Prize		Example Company	All				
Bob Test	3	All Companies	All	06-Nov-2010	31-Jul-2012		

Site: Chadstone

Add to Favourites

3. Press the **Description** of the prize you want to edit.

Report - Active Jackpot Details

Description	Ident	Company	Site	Start Date	End Date	Jackpot	Processed
Create New Loyalty Prize		Example Company	All				
Bob Test	3	All Companies	All	06-Nov-2010	31-Jul-2012		

Site
Chadstone

Add to Favourites

The Loyalty Prize Maintenance screen is displayed.

Loyalty Prize Maintenance For All Companies

Company: All Companies

Site: All Site

Prize Number: 3 : Bob Test

Prize Description: Bob Test

Settings Control Filters Prize Jackpot Control

Start Date: 6/11/2010

End Date: 31/07/2012

Number Of Prizes: 1

Period: Yearly

Instant Prize: False

Prize Hour: Midnight

Prize Day: Every Day

Start Hour: Midnight

End Hour: 11 PM

Site Exceptions (eg 1,2,3):

Prize Message:

Lottery Number:

Enabled: True

Processed: False

New Delete Save Reset

4. Select **False** in the **Enabled** drop-down field.

Managing jackpots and prizes

Loyalty Prize Maintenance For Example Company

Company:

Site:

Prize Number:

Prize Description:

Settings **Control** Filters Prize Jackpot Control

Start Date:	<input type="text" value="26/11/2015"/>
End Date:	<input type="text" value="25/11/2016"/>
Number Of Prizes:	<input type="text"/>
Period:	<input type="text" value="Disabled"/>
Instant Prize:	<input type="text" value="False"/>
Prize Hour:	<input type="text" value="Midnight"/>
Prize Day:	<input type="text" value="Every Day"/>
Start Hour:	<input type="text" value="Midnight"/>
End Hour:	<input type="text" value="11 PM"/>
Site Exceptions (eg 1,2,3):	<input type="text"/>
Prize Message:	<input type="text"/>
Lottery Number:	<input type="text"/>
Enabled:	<input type="text" value="True"/>
Processed:	<input type="text" value="False"/>

5. Press .


The jackpot prize is disabled.

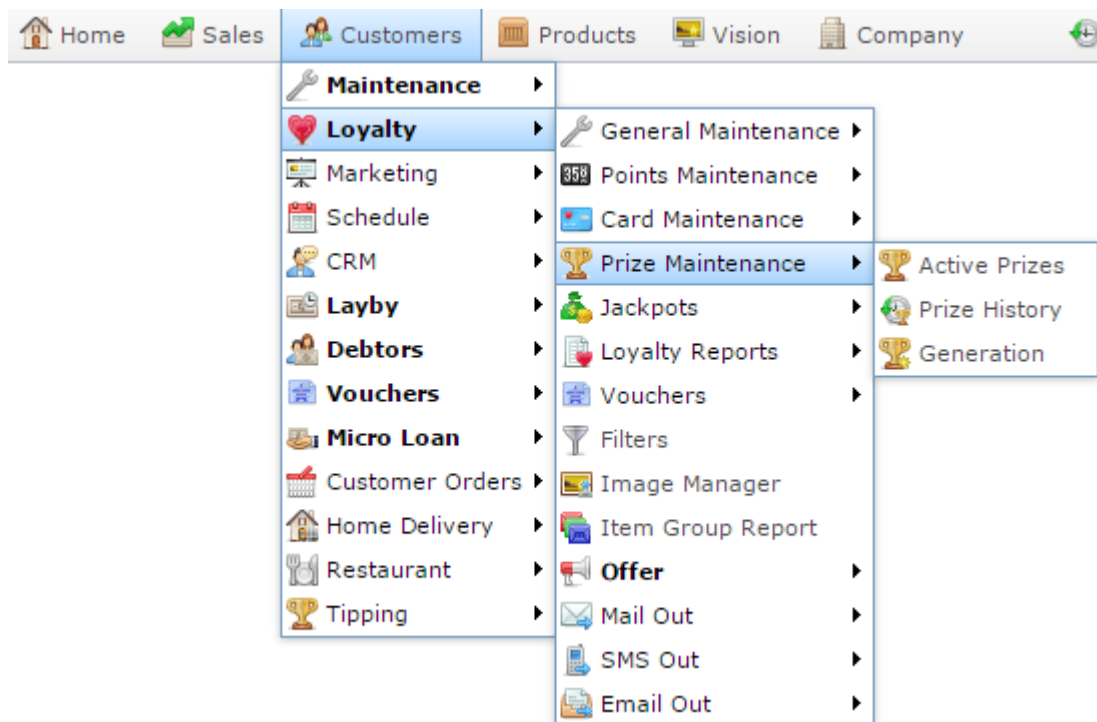
Deleting a jackpot prize

Delete a jackpot prize to remove it from your Portal. The jackpot prize history will not be deleted.

Note: You can disable a jackpot prize without deleting it. See *Disabling a jackpot prize* on page 220.

To delete a jackpot prize:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Prize Maintenance > Active Prizes**.



The Active Jackpot Details report is displayed.

Report - Active Jackpot Details

Description	Ident	Company	Site	Start Date	End Date	Jackpot	Processed
Create New Loyalty Prize		Example Company	All				
Bob Test	3	All Companies	All	06-Nov-2010	31-Jul-2012		

Site

Chadstone

Add to Favourites

3. Press the **Description** of the prize you want to edit.

Report - Active Jackpot Details

Description	Ident	Company	Site	Start Date	End Date	Jackpot	Processed
Create New Loyalty Prize		Example Company	All				
Bob Test	3	All Companies	All	06-Nov-2010	31-Jul-2012		

Site
Chadstone

Add to Favourites

The Loyalty Prize Maintenance screen is displayed.

Loyalty Prize Maintenance For All Companies

Company: All Companies
Site: All Site
Prize Number: 3 : Bob Test
Prize Description: Bob Test

Settings Control Filters Prize Jackpot Control

Start Date: 6/11/2010
End Date: 31/07/2012
Number Of Prizes: 1
Period: Yearly
Instant Prize: False
Prize Hour: Midnight
Prize Day: Every Day
Start Hour: Midnight
End Hour: 11 PM
Site Exceptions (eg 1,2,3):
Prize Message:
Lottery Number:
Enabled: True
Processed: False

New Delete Save Reset

4. Press **Delete**.


The jackpot prize is deleted.

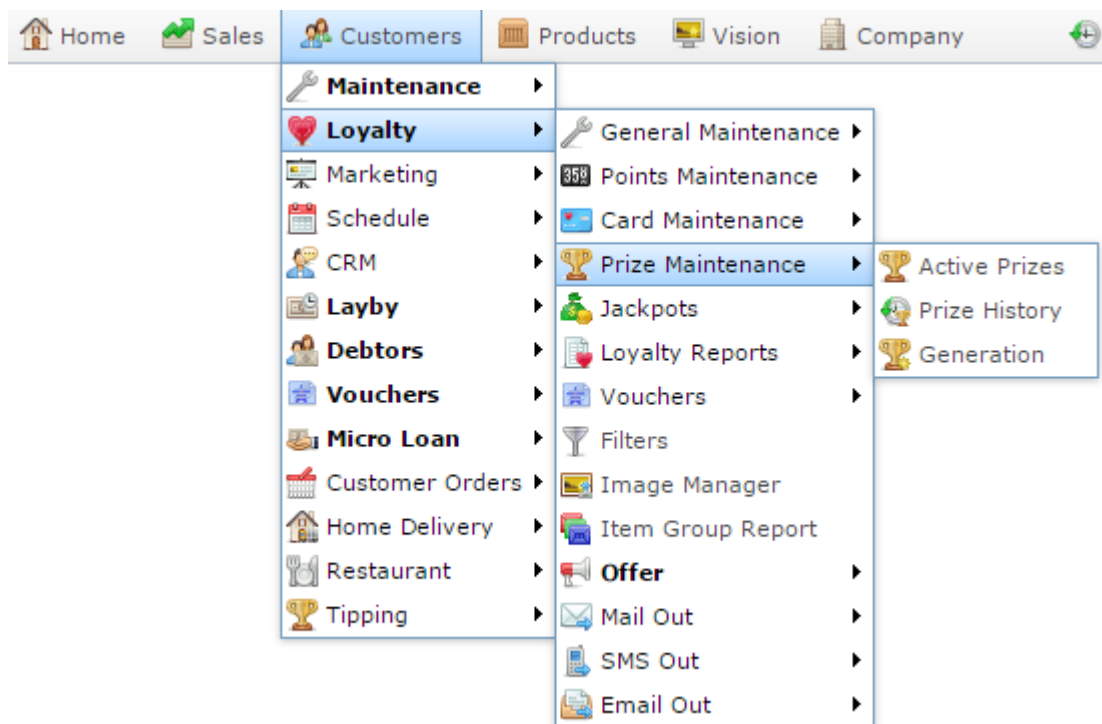
Jackpot To Activate report

Use the Jackpot To Activate report to activate jackpots in the Portal. Only active jackpots collect points from transactions for their reward pool. See *Activating a jackpot* on page 216.

Opening the Jackpot To Activate report

To open the Jackpot To Activate report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Prize Maintenance > Generation**.



The Jackpot To Activate report is displayed.

Jackpot - Jackpot to Activate

Description	Ident	Company	Site	Start Date	End Date	Jackpot	Processed
<u>Bob Test</u>	3	All Companies	All	06-Nov-2010	31-Jul-2012		

Site

Chadstone

Add to Favourites

Managing jackpots and prizes

Jackpot To Activate report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site /	Select the site or sites to report on.
Sites	

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.


Field	Description
Description	Description of the jackpot prize.
Ident	Unique code to identify the prize.
Company	The companies participating in this jackpot prize.
Site / Sites	The sites participating in this jackpot prize.
Start Date	The date the prize starts to run from.
End Date	The date the prize stops running.
Jackpot	A tick indicates this record is a jackpot.
Processed	A tick indicates the prize has been run.

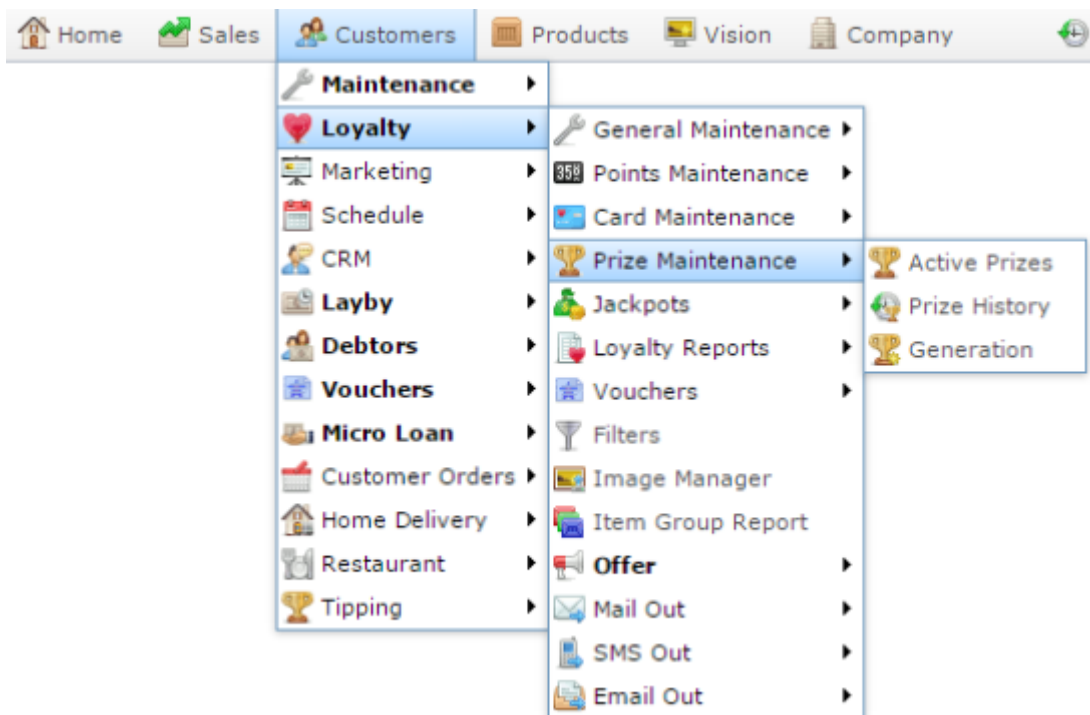
Active Jackpot Details report

Use the Active Jackpot Details report to view and edit the current jackpots you have in the Portal.

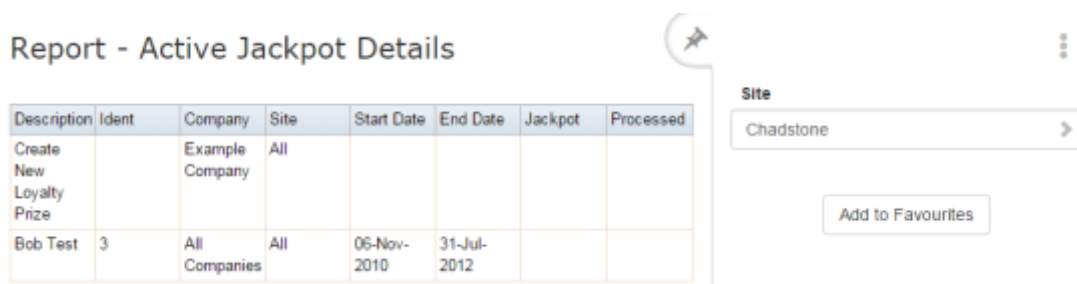
Opening the Active Jackpot Details report

To open the Active Jackpot Details report:

1. Press  Customers from the menu bar.
2. Press **Loyalty > Prize Maintenance > Active Prizes**.




The Active Jackpot Details report is displayed.



Active Jackpot Details report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the jackpot prize.
Ident	Unique code to identify the prize.
Company	The companies participating in this jackpot prize.
Site / Sites	The sites participating in this jackpot prize.
Start Date	The date the prize starts to run from.
End Date	The date the prize stops running.
Jackpot	A tick indicates this record is a jackpot.
Processed	A tick indicates the prize has been run.

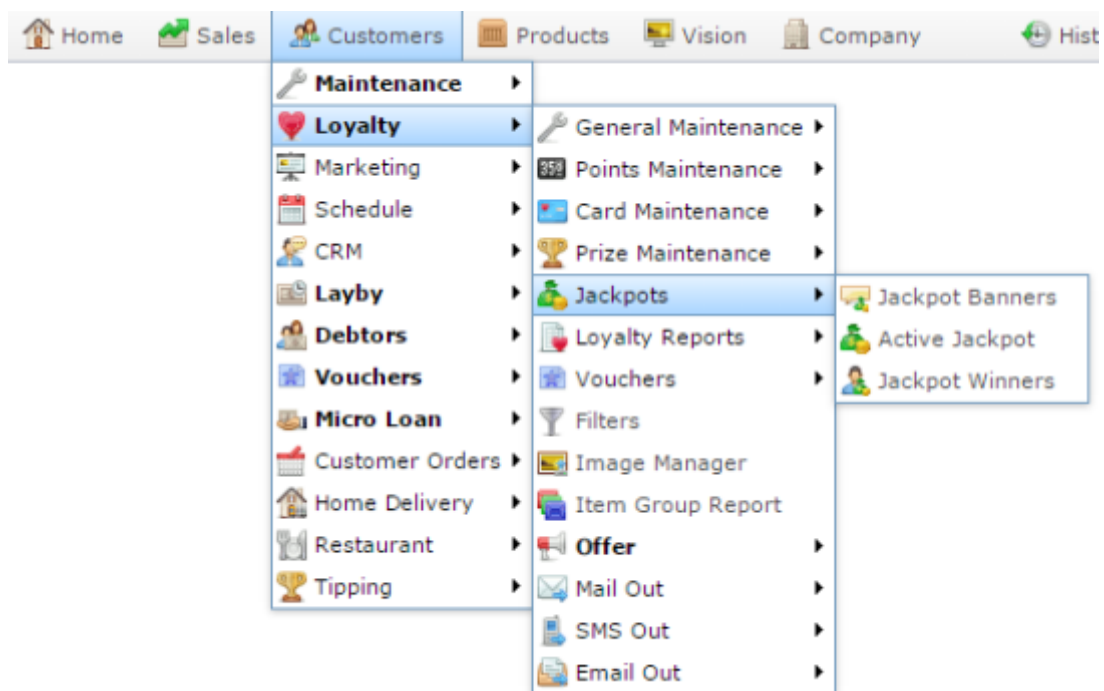
Loyalty Jackpot report

Use the Loyalty Jackpot report to view the active jackpots in your Portal.

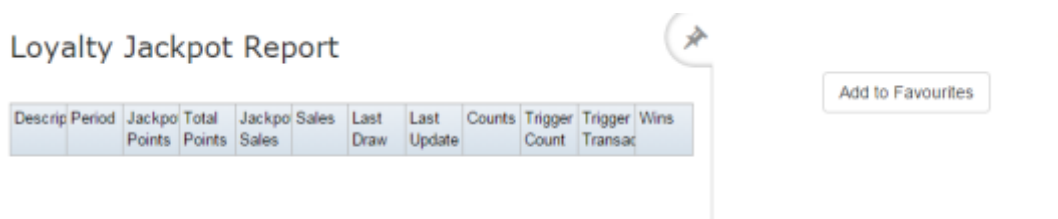
Opening the Loyalty Jackpot report

To open the Loyalty Jackpot report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Jackpots > Active Jackpot**.



The Loyalty Jackpot report is displayed.



Managing jackpots and prizes

Loyalty Jackpot report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the jackpot.
Period	Specifies how the transactions are grouped. For example, once a day.
Jackpot Points	Loyalty points awarded to the loyalty member by the jackpot.
Total Points	Total loyalty points accrued by the loyalty member during this transaction.
Jackpot Sales	Dollar value of jackpot-eligible items in the transaction.
Sales	Dollar value of the transaction, including the jackpot win.
Last Draw	Date the last jackpot was drawn.
Last Update	Date the jackpot was last edited.

Field	Description
Count / Counts	The number of transactions added to the pool.
Trigger Count	The number of times the jackpot has been triggered.
Trigger Transaction	The randomised transaction number that will trigger the next jackpot.
Wins	Number of jackpot wins for this period.

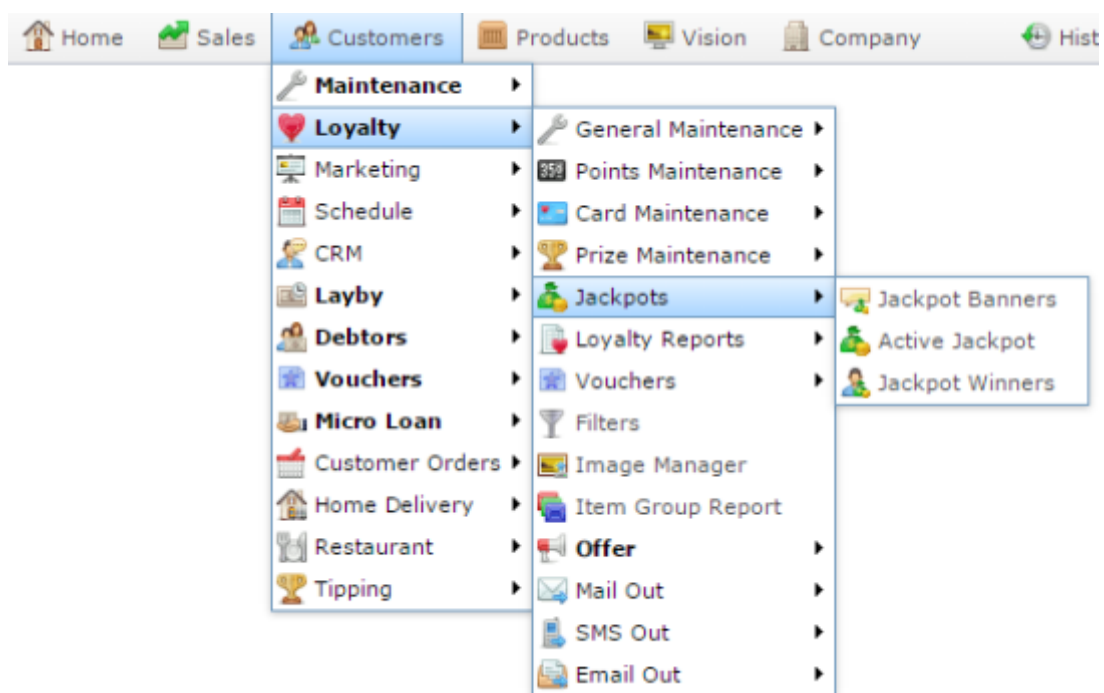
Jackpot Winners report

Use the Jackpot Winners report to view jackpots that have been won.

Opening the Jackpot Winners report

To open the Jackpot Winners report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Jackpots > Jackpot Winners**.



The Jackpot Winners report is displayed.



Jackpot Winners report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Period	Select to view the report: <ul style="list-style-type: none">▪ Hourly.▪ Daily.▪ Weekly▪ Monthly.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the jackpot.
Jackpot Points	Loyalty points awarded to the loyalty member by the jackpot.
Total Points	Total loyalty points accrued by the loyalty member during this transaction.
Jackpot Sales	Dollar value of jackpot-eligible items in the transaction.
Sales	Dollar value of the transaction, including the jackpot win.
Start of Draw	Date the jackpot draw began.
Date of Win	Date the jackpot win occurred.
Count / Counts	The number of transactions added to the pool.


Field	Description
Company	The company the winning loyalty member belonged to.
Site	The site the winning loyalty member belonged to.
Terminal	The terminal that processed the win.
Journal	Unique code to identify the winning transaction.
Jackpot #	Unique code identifying the jackpot.
Card # / Card	The card number identifying the loyalty member.

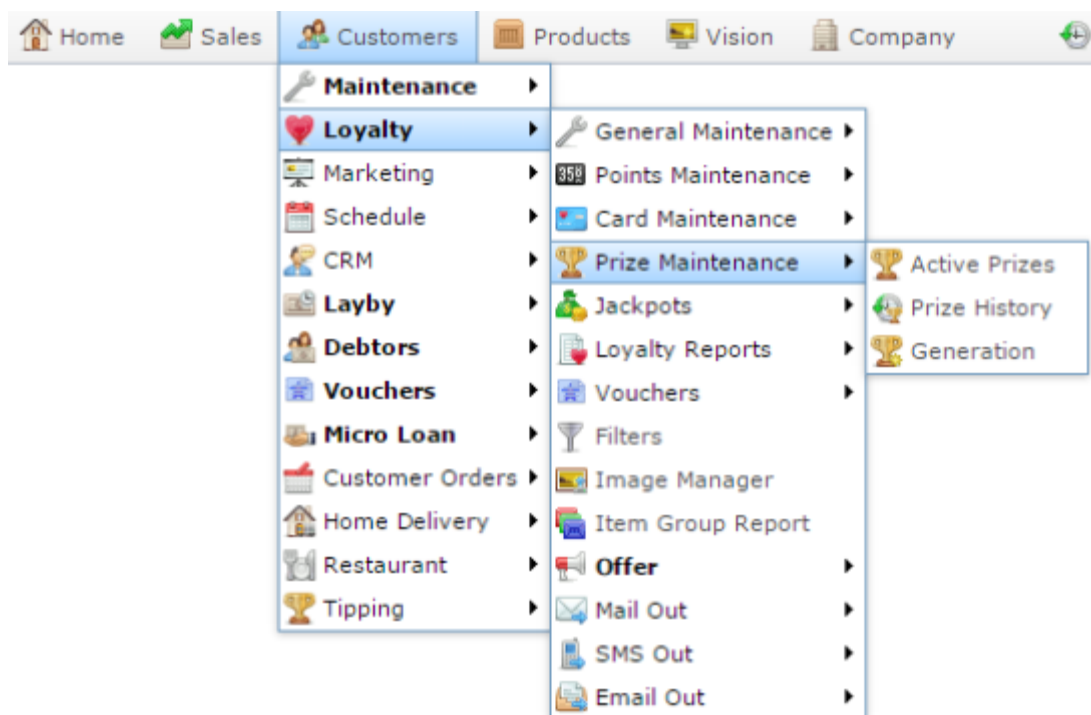
Loyalty Prize Maintenance screen

Use this screen to create jackpots and loyalty prizes for your company.

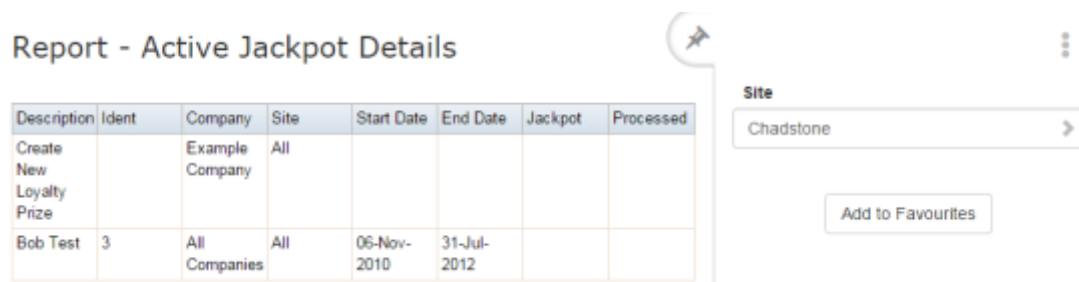
Opening the Loyalty Prize Maintenance screen

To open the Loyalty Prize Maintenance screen:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Prize Maintenance > Active Prizes**.



The Active Jackpot Details report is displayed.



3. Press the **Description** of the prize you want to edit.

Managing jackpots and prizes

Report - Active Jackpot Details

Description	Ident	Company	Site	Start Date	End Date	Jackpot	Processed
Create New Loyalty Prize		Example Company	All				
Bob Test	3	All Companies	All	06-Nov-2010	31-Jul-2012		

Site: Chadstone

Add to Favourites

The Loyalty Prize Maintenance screen is displayed.

Loyalty Prize Maintenance For All Companies

Company: All Companies
Site: All Site
Prize Number: 3 : Bob Test
Prize Description: Bob Test

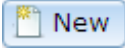
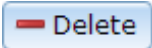
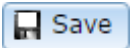
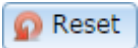
Settings | Control | Filters | Prize | Jackpot Control

Start Date: 6/11/2010
End Date: 31/07/2012
Number Of Prizes: 1
Period: Yearly
Instant Prize: False
Prize Hour: Midnight
Prize Day: Every Day
Start Hour: Midnight
End Hour: 11 PM
Site Exceptions (eg 1,2,3):
Prize Message:
Lottery Number:
Enabled: True
Processed: False

New Delete Save Reset

Loyalty Prize Maintenance screen key fields and buttons

Common fields and buttons

Field	Description
Company	The company responsible for the jackpot prize.
Site	The site responsible for the jackpot prize.
Prize Number	Unique code identifying the prize.
Prize Description	Description of the prize.
 New	Create new jackpot prize.
 Delete	Delete this jackpot prize.
 Save	Save changes to this jackpot prize.
 Reset	Reset any changes since this jackpot prize was saved.

Settings tab

Use this area to dictate when the jackpot prize is awarded.

Loyalty Prize Maintenance For All Companies

Company: All Companies
Site: All Site
Prize Number: 3 : Bob Test
Prize Description: Bob Test

Settings Control Filters Prize Jackpot Control

Start Date: 6/11/2010
End Date: 31/07/2012
Number Of Prizes: 1
Period: Yearly
Instant Prize: False
Prize Hour: Midnight
Prize Day: Every Day
Start Hour: Midnight
End Hour: 11 PM
Site Exceptions (eg 1,2,3):
Prize Message:
Lottery Number:
Enabled: True
Processed: False

New Delete Save Reset

Field

Description

Start Date Date the jackpot prize is available from.

End Date Date the jackpot prize stops being available.

Number of Prizes Number of times the jackpot prize can be awarded per period.

Period Period over which the jackpot prize is awarded. For example, hourly, weekly, etc.

Field	Description
Instant Prize	Indicates to the Point of Sale if this transaction one a prize. Note: This field is no longer in use.
Prize Hour	The hour of day the prize is awarded.
Prize Day	The day of week or day of month the prize is awarded. Note: The behaviour of this field depends on the Period you have selected. If you have selected a monthly period, then use this field to select which date of the month the prize is awarded. For example, to award the prize on the 14th of every month, select 14 . If you have selected a Weekly period, use this field to select which day of the week to use. For example, to award the prize every Tuesday, select 3 (Tuesday) . If you are not awarding weekly or monthly, select Every Day .
Start Hour	The time of day the prize starts to be awarded.
End Hour	The time of day the prize stops being awarded.
Site Exceptions	Sites that do not participate in this jackpot prize.
Prize Message	The message to send to the loyalty member who wins the jackpot prize.
Lottery Number	Government registration number required for prizes above a certain size.
Enabled	Select to enable this jackpot prize.

Managing jackpots and prizes

Field	Description
Processed	Indicates if this prize has been awarded.

Control tab

Use this area to dictate the eligibility conditions for the jackpot prize, and the SMS and Email messages.

Field	Description
Transaction Based	Select if this jackpot prize is awarded based on a customer transaction.
Groups	Select the group who is eligible for this jackpot prize.

Note: To make multiple groups eligible, you must create an additional prize per group.

Field	Description
Card Type	Select the card type that is eligible for this jackpot prize. Note: To make multiple card types eligible, you must create an additional prize per card type.
Check Expired	Select True if the jackpot can only be awarded to non-expired cards.
Card Must be Active	Select True if the card must be active to receive the jackpot prize.
Card must be complete	Select True if the card must have the required details complete to receive the jackpot prize.
Notify via SMS	Select if you want to notify the loyalty member of their jackpot win via an SMS message.
Notify via Email	Select if you want to notify the loyalty member of their jackpot win via an email.

Field	Description
SMS Message	Type the SMS message to send to winning loyalty members. To personalise the message, use the following placeholders:
<< FIRST >>	The loyalty member's first name.
<< CARD >>	The loyalty member's card number.
<< POINTS >>	The number of loyalty points added in the jackpot prize.
<< COMPANYNAME >>	The name of the company awarding the jackpot prize.
<< SITENAME >>	The name of the site awarding the jackpot prize.
Email Message	Type the HTML email to send to winning loyalty members. To personalise the message, use the following placeholders:
<< FIRST >>	The loyalty member's first name.
<< CARD >>	The loyalty member's card number.
<< POINTS >>	The number of loyalty points added in the jackpot prize.
<< COMPANYNAME >>	The name of the company awarding the jackpot prize.
<< SITENAME >>	The name of the site awarding the jackpot prize.

Filters tab

Use this area to dictate the trigger conditions for the jackpot prize.

The screenshot shows a web application window titled "Loyalty Prize Maintenance For All Companies". At the top, there are four fields: "Company:" with a dropdown menu set to "All Companies", "Site:" with a dropdown menu set to "All Site", "Prize Number:" with a dropdown menu set to "3 | Bob Test", and "Prize Description:" with the text "Bob Test". Below these fields is a tabbed interface with five tabs: "Settings", "Control", "Filters" (which is selected), "Prize", and "Jackpot Control". The "Filters" tab contains several fields: "Transaction Number:" with the value "0", "Department:" with a dropdown menu set to "Disable", "Item (Multiple Allowed with ; Separator):" (empty), "Trigger On Points:" with the value "0", "Trigger On Amount:" with the value "0", "Maximum Amount for Trigger:" with the value "0", and "Minimum Amount before Trigger:" with the value "0". At the bottom right of the window, there are four buttons: "New", "Delete", "Save", and "Reset".

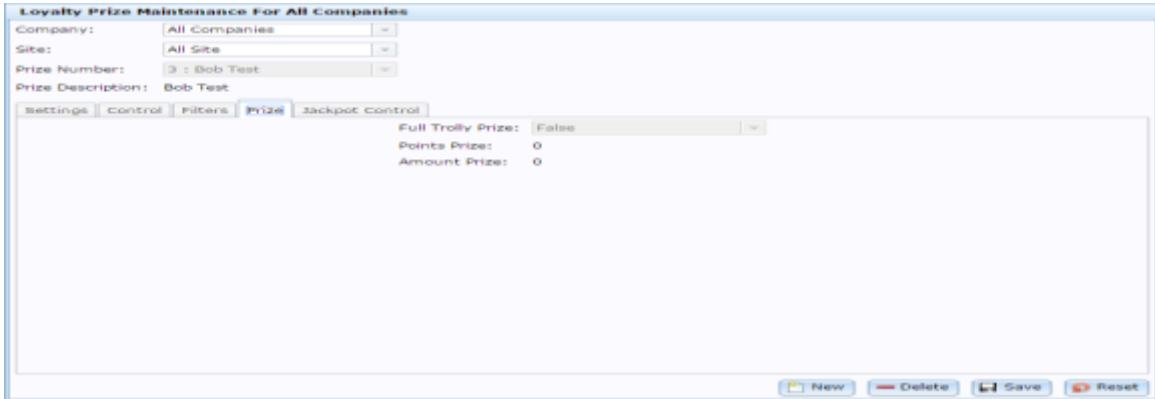
Field	Description
Transaction Number	The randomised transaction number between the maximum and minimum that triggers the jackpot win.
Department	Select to restrict the jackpot prize to only be awarded for transactions involving this department. Note: Jackpots can be restricted to a single department or not restricted by department at all; you cannot select multiple departments.
Item (Multiple Allowed with ; Separator)	Select to restrict the jackpot prize to only be awarded for transactions involving these items. Type the item code of each item separated by a semi-colon. For example, 254; 264; 287 .
Trigger On Points	If you want to trigger a jackpot win based on the number of points accrued in a transaction, type that number of points here.

Field	Description
Trigger On Amount	If you want to trigger a jackpot win based on the dollar total of a transaction, type that dollar value here.
Maximum Amount for Trigger	Type the largest number of points that can be accrued in a transaction to be eligible for the jackpot prize.
Minimum Amount before Trigger	Type minimum number of points that must be accrued in a transaction to be eligible for the jackpot prize.

Managing jackpots and prizes

Prize tab

Use this area to set the points, cash or trolley prize of the jackpot prize.



Field	Description
Full Trolley Prize	This field is no longer used.
Points Prize	Type the number of loyalty points awarded in the jackpot prize.
Amount Prize	Type the dollar amount awarded as the jackpot prize.

Jackpot Control tab

Use this area to determine how the jackpot prize is paid out.

The screenshot shows a web application window titled "Loyalty Prize Maintenance For All Companies". At the top, there are four dropdown menus: "Company:" (All Companies), "Site:" (All Site), "Prize Number:" (3 ; Bob Test), and "Prize Description:" (Bob Test). Below these is a tabbed interface with four tabs: "Settings", "Control", "Filters", and "Prize". The "Jackpot Control" tab is selected and active. It contains a list of settings, each with a label and a value in a dropdown menu:

- Jackpot Harvest Loyalty: False
- Maximum per Period: 1
- Venue To Pay: True
- Percentage of Points: 0
- Jackpot Transaction To Win: 457
- Minimum Transactions before Win: 10
- Maximum Transactions before Win: 1000
- Initial Points for Jackpot: 0

At the bottom right of the window, there are four buttons: "New", "Delete", "Save", and "Reset".

Field	Description
Jackpot Harvest Loyalty	Select False to use only the jackpot's Initial Points as the prize. Select True to subtract loyalty points from transactions to increase the prize pool.
Maximum per Period	Maximum number of jackpots that can be awarded per period.
Venue to Pay	Select True if the company awarding the jackpot is to fund the loyalty points added to the pool. Select False if the loyalty points should be subtracted from the loyalty card in the transaction.
Percentage of Points	Define the percentage of a transaction's points that are added to the pool. For example, if the Percentage of Points is 10, and a loyalty member earns 200 loyalty points, 20 of those points are added to the jackpot pool.

Field	Description
Jackpot Transaction To Win	The randomised transaction number that will trigger winning the jackpot.
Minimum Transactions before Win	The minimum number of transactions a loyalty member must make to be eligible for a jackpot prize.
Maximum Transactions before Win	The maximum number of transactions a loyalty member can make before they are guaranteed a jackpot win.
Initial Points for Jackpot	The initial pool of points created for the jackpot.

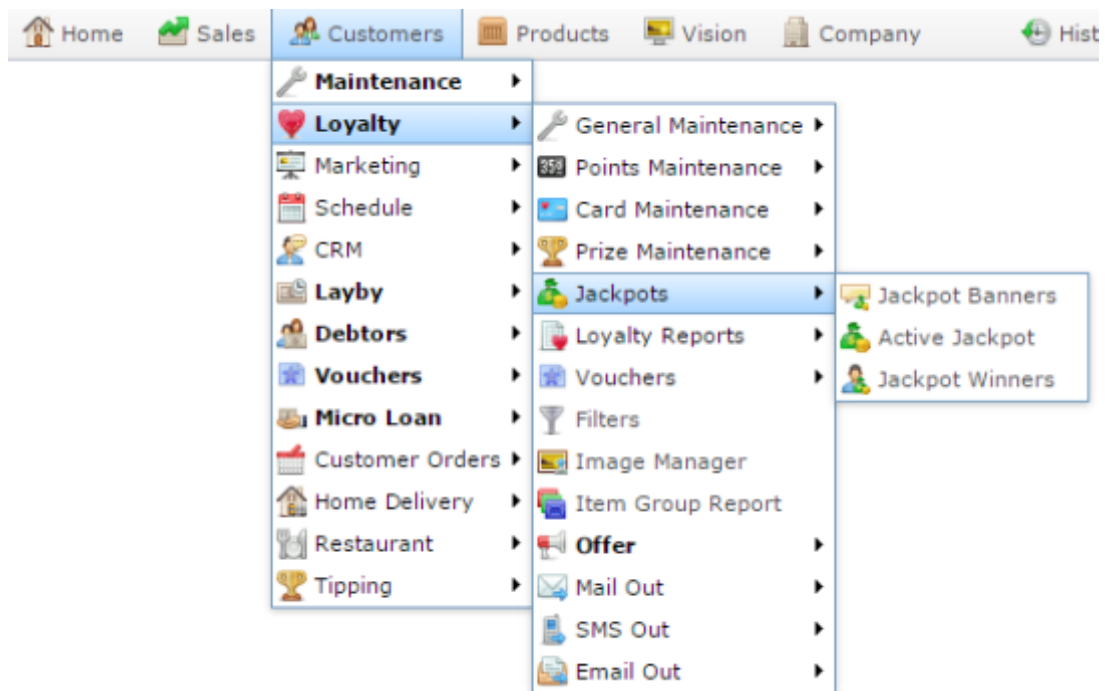
Jackpot Banner Maintenance screen

Create banners to welcome customers, display information, advertise your jackpot or loyalty program, or display the name of the last jackpot winner.

Opening the Jackpot Banner Maintenance screen

To open the Jackpot Banner Maintenance screen:

1. Press  Customers.
2. Press **Loyalty > Jackpots > Jackpot Banners**.



The Jackpot Banner Maintenance screen is displayed.

Managing jackpots and prizes

Jackpot Banner Maintenance

Site: Chadstone

Configuration

Terminal: Base Station

Foreground Test: Black

Background Test: White

Test Banner Text

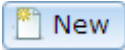
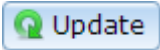
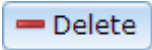
To Show Last Winner, set Banner to LAST_WINNER

Banner	Group	Duration (Seconds)	List Order	Foreground	Background	Enabled	Description
Welcome	Group 1	15	1	Black	White	Yes	New

New Update Delete

Jackpot Banner Maintenance screen key fields and buttons

Configuration area

Field	Description
Site	Select the site to configure banners for.
Terminal	Select the terminal to display the banners.
Foreground Text	Text to appear in the foreground.
Background Text	Text to appear in the background.
 New	Press to create a new banner in the grid.
 Update	Press to save any changes you've made to banners in the grid.
 Delete	Press to delete the currently selected banners.

Banner grid

Field	Description
Banner	Type the text to display as the banner.
	<p>Note: If you want to display the name of the last jackpot winner, type LAST_WINNER.</p>

Field	Description
Group	Loyalty group the banner should be displayed to.
Duration	Type the number of seconds the banner should display for.
List Order	Type the order this banner should be displayed in a sequence of banners. Lower numbers are displayed earlier.
Foreground	Select the text colour of your banner.
Background	Select the background colour of your banner.
Enabled	Select whether this banner should be displayed.
Description	Type a description for your banner.

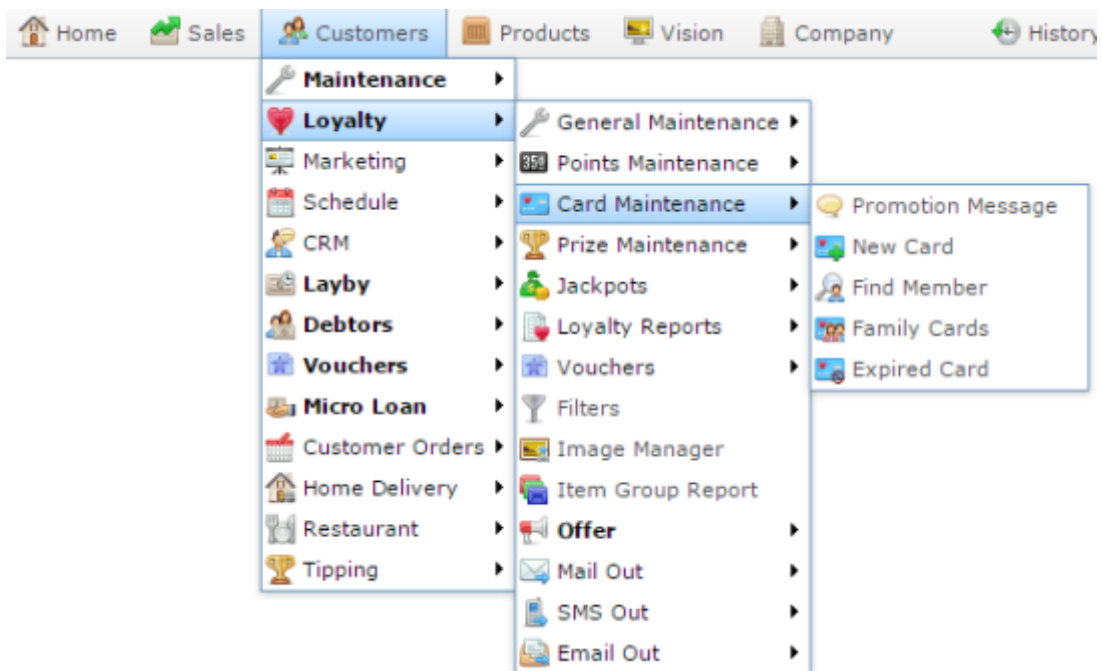
Online Loyalty Promotion Message Maintenance screen

Use this window to create the automatic marketing messages sent to your customers.

Opening the Online Loyalty Promotion Message Maintenance screen

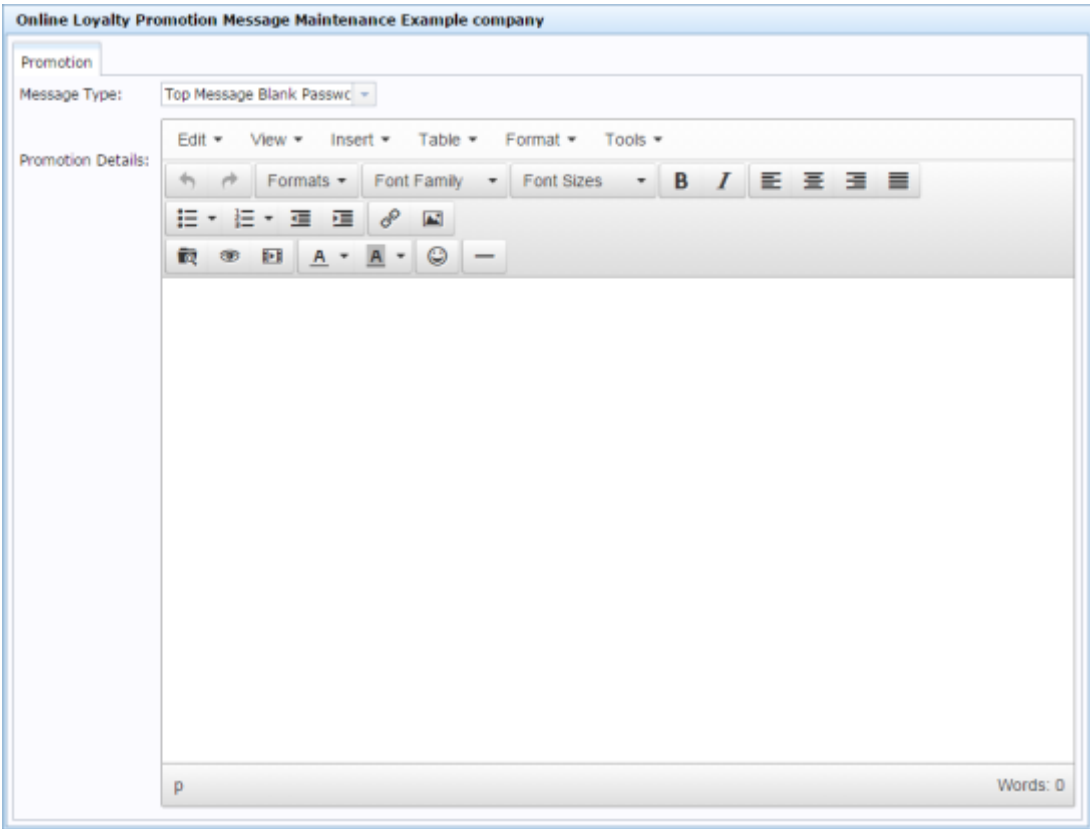
To open the Online Loyalty Promotion Message Maintenance screen:

1. Press  Customers.
2. Press **Loyalty > Card Maintenance > Promotion Message**.



The Online Loyalty Promotion Message Maintenance screen is displayed.

Managing jackpots and prizes



Online Loyalty Promotion Message Maintenance screen key fields and buttons

Field	Description
Message Type	Select the message to customise.
Promotion Details	Create and edit your message using simple word processing features. You can also insert tables, videos and pictures using the Insert and Table menus.

Managing Offers

Create and maintain offers to reward customers with discounts or extra loyalty points for shopping during particular times, buying particular items or belonging to certain loyalty groups or card types. Offers are different from promotions, discounts or frequent shopper items because they can be limited by a total number available by both company and site. For example, a reward may only be available to the first 100 customers, or the first 10 customers each day.

Also see:

- *Offers report* on page 268.
- *Offer Jobs Attached report* on page 272.
- *Promotion Offers report* on page 294.
- *Offer Statistics report* on page 289.
- *Offer Maintenance screen* on page 275.

What you can do:

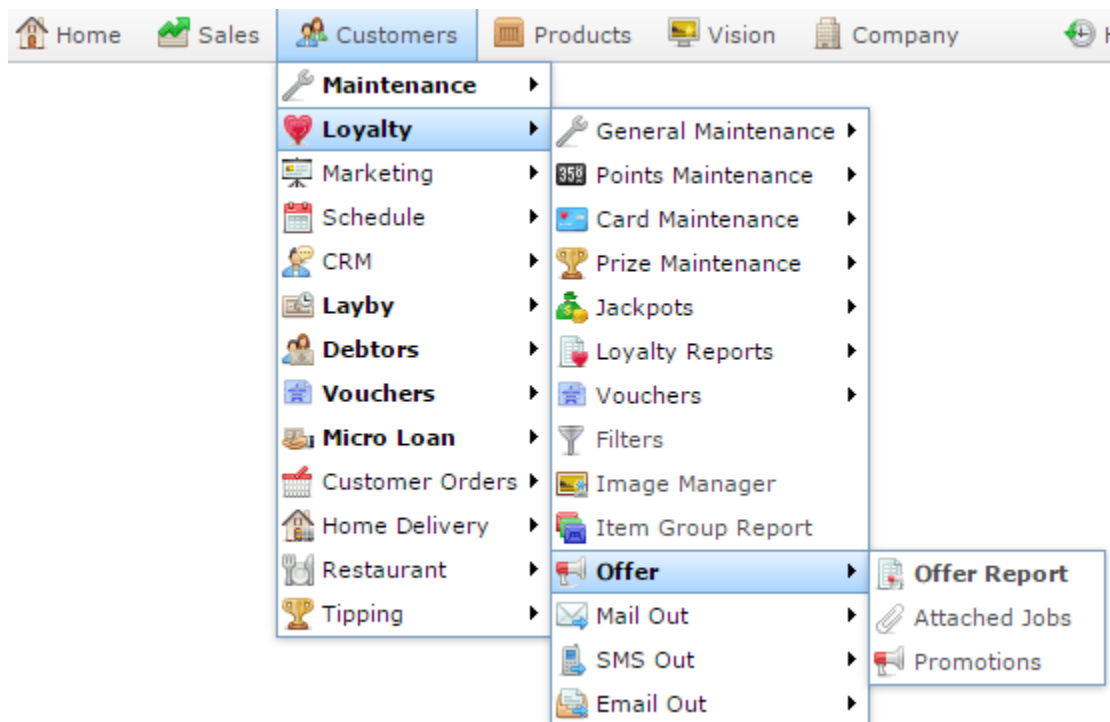
- *Creating a new offer* on page 261.
- *Editing an offer* on page 263.
- *Sending an offer out to customers* on page 265.
- *Deleting an offer* on page 266.

Creating a new offer

Create a new offer to reward customers with discounts or additional loyalty points for purchasing items during specific periods.

To create a new offer:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Offer > Offer Report**.



The Offers report is displayed.


Offers Report For Dates Between Mon 08 Jun 2015 and Tue 08 Dec 2015

Descriptio	Date Active	Expiry Date	Start Time	End Time	Offer Period	Reference	Loyalty	Enabled
<u>End of Year</u>	01 Dec 2015	16 Dec 2015	00:00	23:59	Full			✓

Date From: 8/06/2015

Date: 8/12/2015

Add to Favourites Create New Offer

3. Press .

The Offer Maintenance screen is displayed.

Offer Maintenance

Offer:

Description:

Details | Settings | Control | Loyalty | Filters

Date Active:

Expiry Date:

Enabled:

Allow with Promotions:

Reference:

Offer Details:

4. Type a description of the offer in the **Description** field.
5. Select the period the offer should be active using the **Date Active** and **Expiry Date** field.
6. Select **Enabled** to make the offer available to use in the Portal.
7. Select and define the other fields as required.

See *Offer Maintenance* screen on page 275.


8. Press .

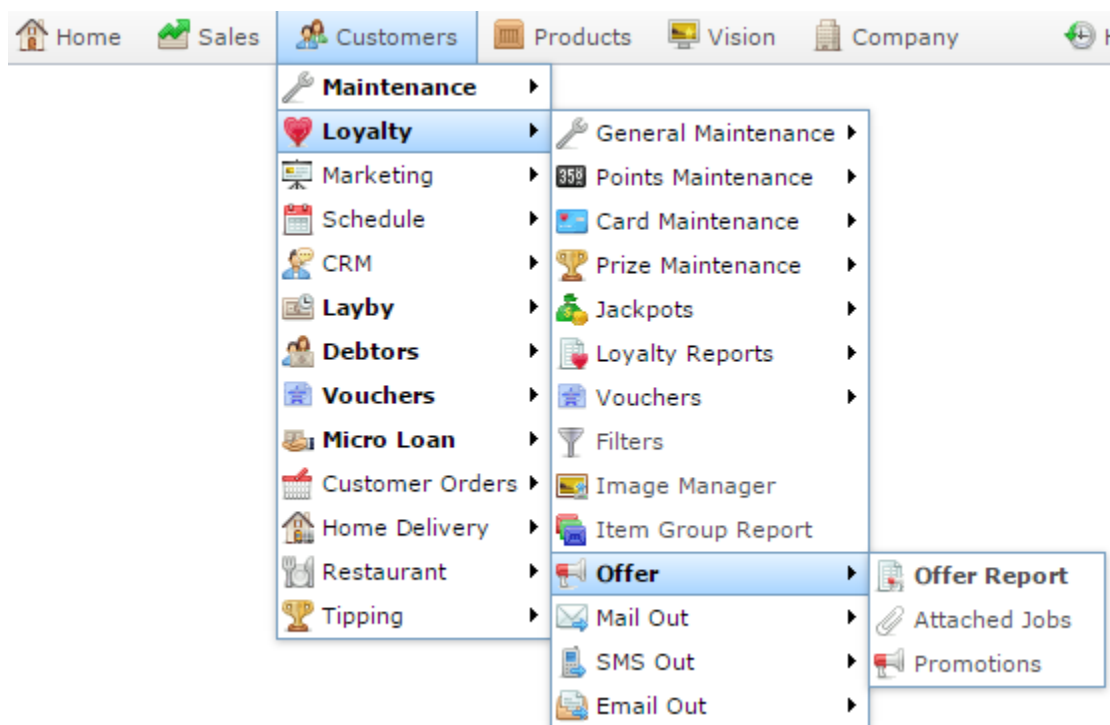
The offer is created.

Editing an offer

Edit an offer to change the availability or the rewards for your customers.

To edit an offer:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Offer > Offer Report**.



The Offers report is displayed.

Offers Report For Dates Between Mon 08 Jun 2015 and Tue 08 Dec 2015

Description	Date Active	Expiry Date	Start Time	End Time	Offer Period	Reference	Loyalty	Enabled
End of Year	01 Dec 2015	16 Dec 2015	00:00	23:59	Full			✓

Date From: 8/06/2015

Date: 8/12/2015

Add to Favourites Create New Offer

3. Press the **Description** of the offer you want to edit.
A popup menu is displayed.

Offers Report For Dates Between Mon 23 Aug 2010 and Tue 23 Feb 2016

Description	Date Active	Expiry Date	Start Time	End Time	Offer Period	Reference	Loyalty	Enabled
Rainbow	07 Jan 2014	24 Jan 2015	00:00	23:00	Full	106		✓
Promo 9000	18 Jan 2011	31 Jul 2014	22:30	23:00	Day	268		✓
50% Off BL	11 Dec 2013	25 Dec 2013	00:00	23:00	Full	BLT	✓	✓

Date From

Date

4. Press **Edit Offer**.

The Offer Maintenance screen is displayed.

Offer Maintenance

Offer:

Description:

Date Active:

Expiry Date:

Enabled:

Allow with Promotions:

Reference:

Offer Details:

5. Make the changes as required.

See *Offer Maintenance* screen on page 275.

6. Press .

The offer is saved.

Sending an offer out to customers

You can send offers out to customers using mail, SMS message or email to notify them of your promotion.

Tip: Offers can be limited to be available only to customers who have received the offer via email. See the **Linked Email** field in the Settings tab of Offer Maintenance. *Offer Maintenance screen on page 275.*

To send out an offer:

1. Create the new offer, if necessary.
See *Creating a new offer* on page 261.
2. To send an offer via:
 - Email, open the Email Report Options screen.
See *Email Report Options screen* on page 379.
 - Printed mail, open the Mail Out Report Options screen.
See *Mail Out Report Options screen* on page 393.
 - SMS, open the SMS Mail Out Report Options screen.
See *SMS Report Options screen* on page 413.
3. In the Options tab, select the offer you want to send out from the Offer drop-down field.
4. Select the other criteria to create a list of the customers you want to send the offer to, and send the mail out.

See one of:

Sending email mail outs on page 364.

Sending printed mail outs on page 368.


Sending SMS mail outs on page 377.

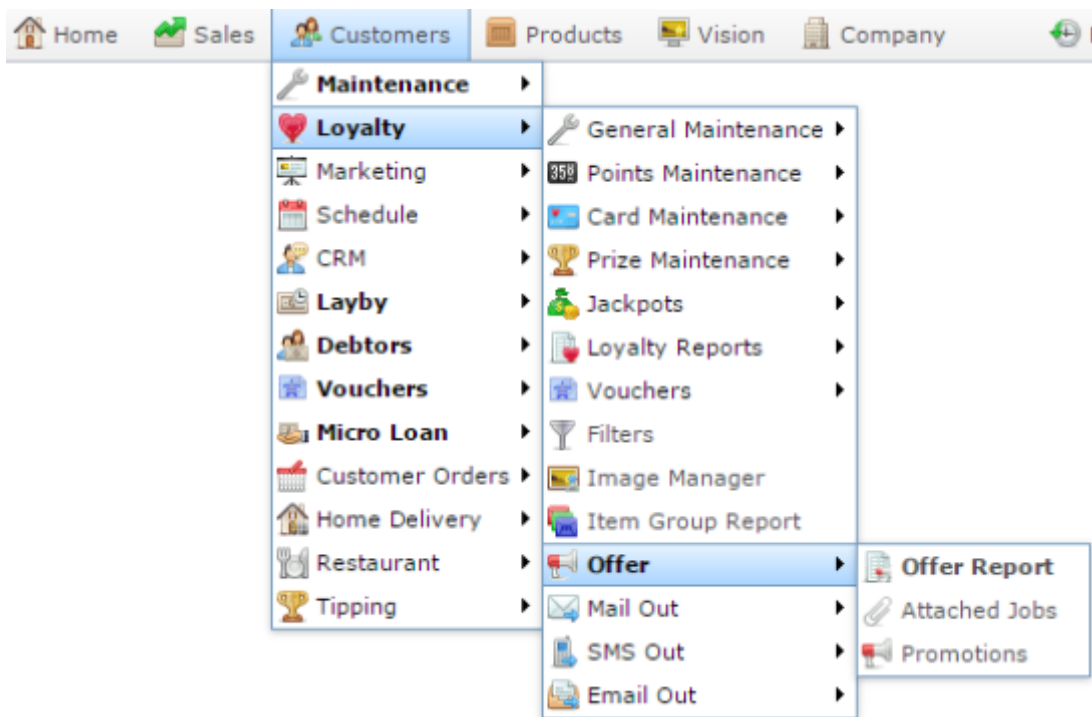
The offer is sent out to customers.

Deleting an offer

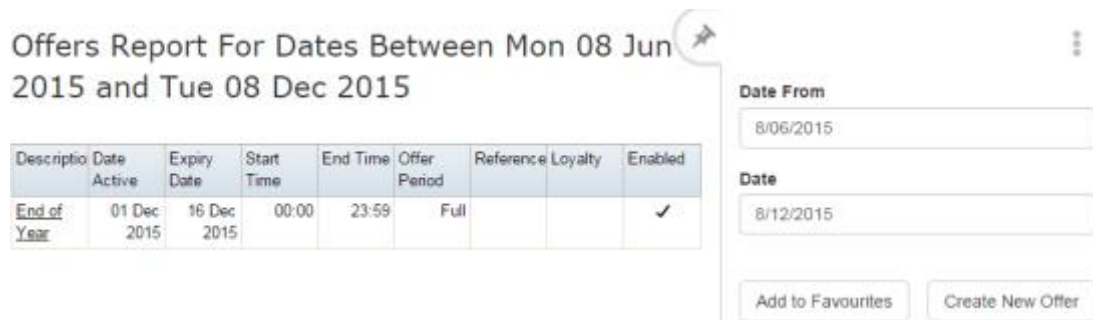
Delete an offer to remove it from the Portal.

To delete an offer:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Offer > Offer Report**.



The Offers report is displayed.



3. Press the **Description** of the offer you want to delete.
A popup menu is displayed.

Offers Report For Dates Between Mon 23 Aug 2010 and Tue 23 Feb 2016

Description	Date Active	Expiry Date	Start Time	End Time	Offer Period	Reference	Loyalty	Enabled
Rainbow	07 Jan 2014	24 Jan 2015	00:00	23:00	Full	106		✓
Promo 5000	18 Jan 2011	31 Jul 2014	22:30	23:00	Day	268		✓
50% Off BL	11 Dec	25 Dec 2013	00:00	23:00	Full	BLT	✓	✓

Date From
23/08/2010

Date
23/02/2016

Add to Favourites Create New Offer

4. Press **Edit Offer**.

The Offer Maintenance screen is displayed.

Offer Maintenance

Offer: [3] 50% Off BLT

Description: 50% Off BLT

Details Settings Control Loyalty Filters

Date Active: 11/12/2013

Expiry Date: 25/12/2013

Enabled: True

Allow with Promotions: False

Reference: BLT

Offer Details: Half Price BLT for first 500 Members

New Delete Save

5. Press .

The offer is deleted.

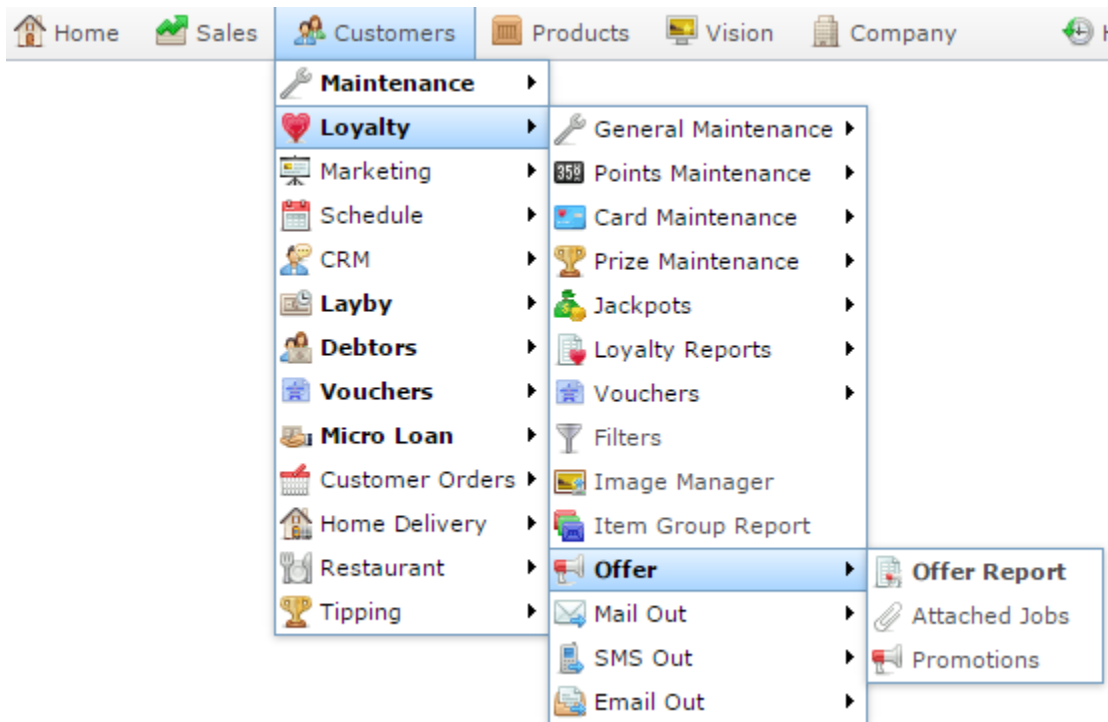
Offers report

Use the Offers report to view the offers that have been available to loyalty members.

Opening the Offers report

To open the Offers report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Offer > Offer Report**.



The Offers report is displayed.

Offers Report For Dates Between Mon 08 Jun 2015 and Tue 08 Dec 2015

Descriptio	Date Active	Expiry Date	Start Time	End Time	Offer Period	Reference	Loyalty	Enabled
<u>End of Year</u>	01 Dec 2015	16 Dec 2015	00:00	23:59	Full			✓

Date From: 8/06/2015

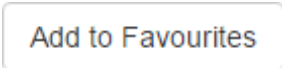

Date: 8/12/2015

Add to Favourites Create New Offer

Offers report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to create a new offer.
Date /	Select the date or date period to report on.
Date From and Date To /	
As of /	
Start Date and End Date	

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Offer / Description	Name of the offer.
Start Date / Active Date / Date Active	Date the offer starts.
End Date / Expiry Date	Date the offer ends.
Start Time	Time the offer starts.
End Time	Time the offer ends.
Reference	An optional user-defined field in the Details tab of Offer Maintenance. See <i>Offer Maintenance screen</i> on page 275.
Loyalty Only / Loyalty	Whether the offer is only available to loyalty members.


Field	Description
Enabled	Whether the offer is available from the Portal.

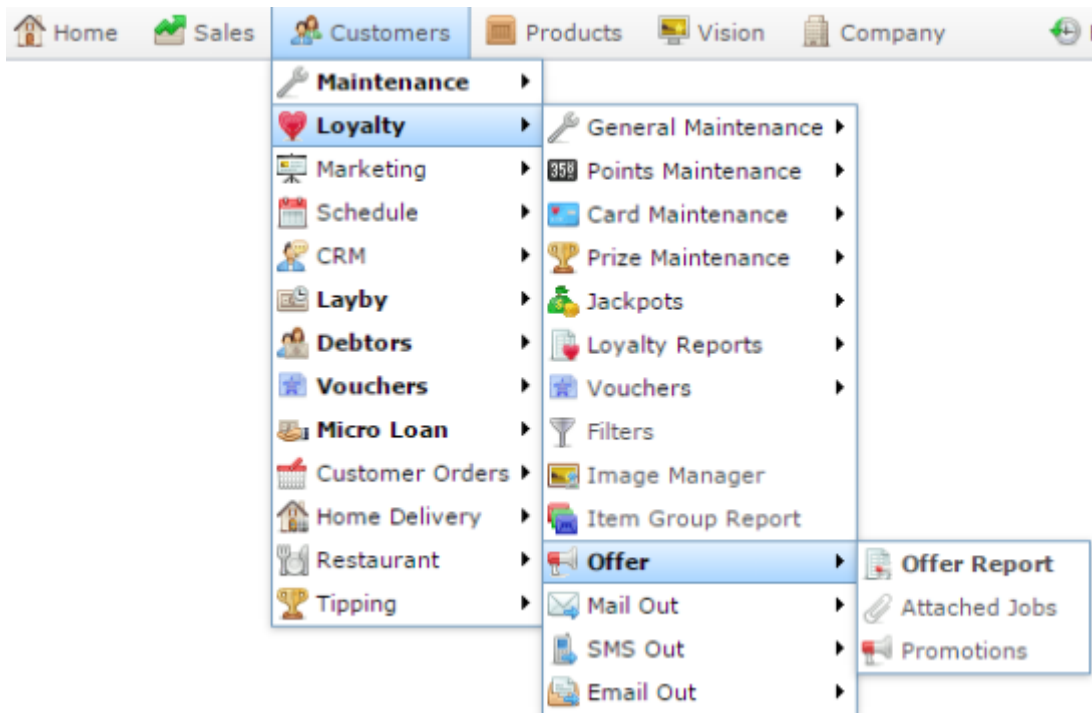
Offer Jobs Attached report

Use this report to track the SMS and emails that sent particular offers.

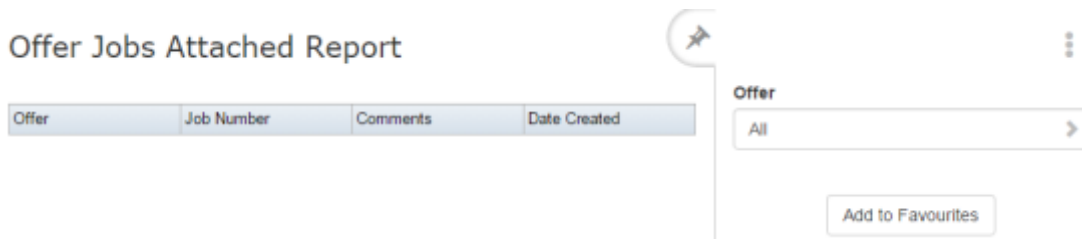
Opening the Offer Jobs Attached report

To open the Offer Jobs Attached report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Offer > Attached Jobs**.



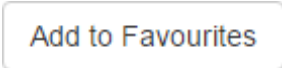
The Offer Jobs Attached report is displayed.



Offer Jobs Attached report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Offer	Select the offer to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Offer / Description	Name of the offer.
Job Number	Job number representing the SMS and emails that the offer was sent through.
Comments	Comments on the offer job.
Date Created	Date the offer job was created.

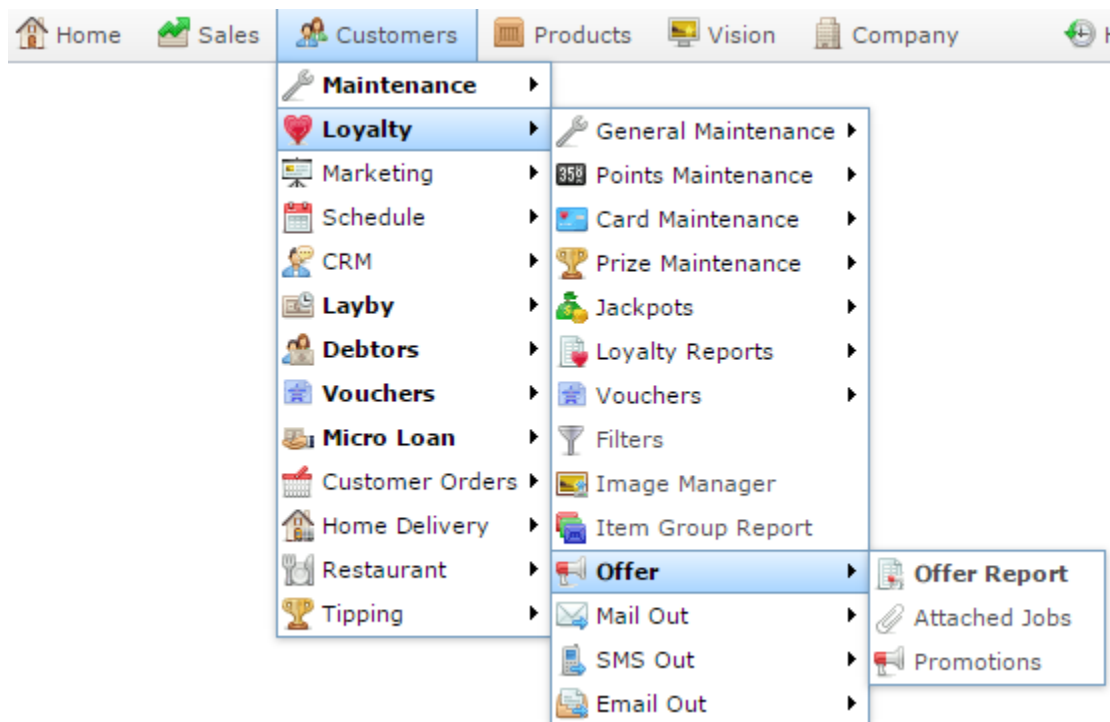
Offer Maintenance screen

Use the Offer Maintenance screen to create and edit offers.

Opening the Offer Maintenance screen

To open the Offer Maintenance screen:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Offer > Offer Report**.



The Offers report is displayed.

Offers Report For Dates Between Mon 08 Jun 2015 and Tue 08 Dec 2015

Descriptio	Date Active	Expiry Date	Start Time	End Time	Offer Period	Reference	Loyalty	Enabled
<u>End of Year</u>	01 Dec 2015	16 Dec 2015	00:00	23:59	Full			✓

Date From:

Date:

3. Press .

The Offer Maintenance screen is displayed.

Managing Offers

Offer Maintenance

Offer:

Description:

Details Settings Control Loyalty Filters

Date Active:


Expiry Date:

Enabled:

Allow with Promotions:

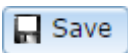
Reference:

Offer Details:

 Save

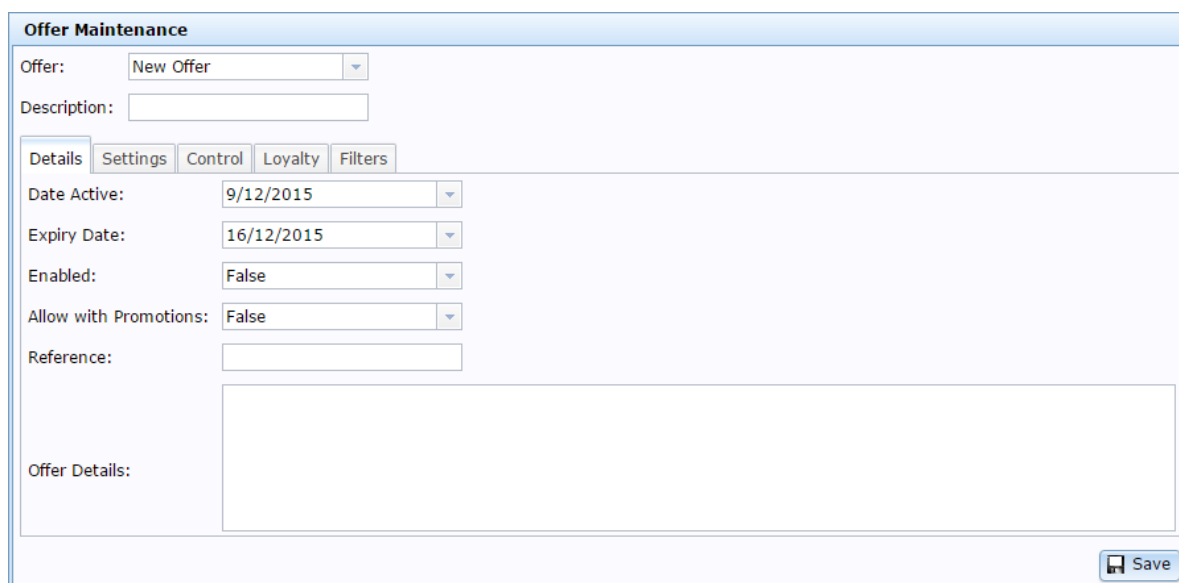
Offer Maintenance screen key fields and buttons

Common fields and buttons

Field	Description
Offer	Select the offer to edit or New Offer to create a new offer.
Description	Type a description or name for the offer.
	Save any changes to the offer.

Details tab

Use this area to maintain the dates the offer is available, and whether it can be used with promotions.



The screenshot shows the 'Offer Maintenance' window with the 'Details' tab selected. The 'Offer' dropdown is set to 'New Offer'. The 'Description' field is empty. The 'Date Active' is set to 9/12/2015, and the 'Expiry Date' is set to 16/12/2015. Both 'Enabled' and 'Allow with Promotions' are set to 'False'. There is a 'Reference' field which is empty. Below these fields is a large 'Offer Details' text area, also empty. A 'Save' button is located at the bottom right of the form.

Field	Description
Date Active	Date the offer is available from.

Field	Description
Expiry Date	Date the offer is no longer available.
Enabled	Select whether the offer can be used in the Portal.
Allow with Promotions	Select whether the offer can be used in conjunction with promotions.
Reference	Record information for your own purposes in this field.
Offer Details	Type a description of the offer to show customers.

Settings tab

Use this area to define the number of offers available, where they are available, and the offer benefits.

Offer Maintenance

Offer: ▾

Description:

Number Of :

Number Of Per Site:

Points Multiplier:

Offer Points:

Offer Discount:

Offer Amount:

Tax Rate:

Site Exceptions (eg 1,2,3):

location Exceptions (eg 1,2,3):

Field	Description
Number Of	Type the total number of offers that can be redeemed.
Number Of Per Site	Type the total number of offers that can be redeemed at each site.
Points Multiplier	Type the number that the loyalty points are multiplied by for this offer.
Offer Points	The number of loyalty points awarded by this offer.
Offer Discount	The total sale discount awarded by this offer.

Field	Description
Offer Amount	The amount applied as a reduction at the Point of Sale. <div data-bbox="560 427 1393 521" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;">Note: This feature is not supported by iZen Point of Sale.</div>
Tax Rate	The tax rate that applies to the offer.
Site Exceptions	List the codes of sites that are not eligible for the offer, separated by commas.
Location Exceptions	List the codes of locations that are not eligible for the offer, separated by commas.

Control tab

Use this area to control when the offer is available, and whether the number of offers available is reset at a regular period.

Offer Maintenance

Offer:

Description:

Offer Period:

Day of Week:

Start Hour:

Start Minute:

End Hour:

End Minute:

Linked to Email:

Field

Description

Field	Description
Offer Period	<p>Select how often the offers are replenished during the period:</p> <hr/> <p>Full The offers are never replenished during the period.</p> <p>If the Number Of offers is set to 50 on the Settings tab, then only 50 offers are available for the entire period.</p> <hr/> <p>Day The offers are replenished each day.</p> <p>If the Number Of offers is set to 50 on the Settings tab, then 50 offers are available each day during the period.</p> <hr/> <p>Week The offers are replenished each week.</p> <p>If the Number Of offers is set to 50 on the Settings tab, then 50 offers are available each week during the period.</p> <hr/> <p>Month The offers are replenished each month.</p> <p>If the Number Of offers is set to 50 on the Settings tab, then 50 offers are available each month during the period.</p>
Day of Week	<p>The days of the week the offer is available.</p>
Start Hour	<p>The time of day the offer starts.</p>
Start Minute	<p>The minute the offer starts.</p>
End Hour	<p>The time of day the offer ends.</p>
End Minute	<p>The minute the offer ends.</p>

Field	Description
Linked to Email	Set to True if the offer should only be available to customers who have received an email regarding the offer, to encourage customers to permit email marketing. Select False if the offer is available to customers even if they have not received an email about the offer.

Loyalty tab

Use this area to define any specific loyalty groups or cards that are included or excluded from the offer, or whether the offer is exclusive to certain loyalty groups or cards.

Offer Maintenance

Offer:

Description:

Loyalty Only:

Birthday:

Option:

Card Type:

Card Type:

Card Type:

Card Type:

Card Type:

Card Type:

Card Type:

Option:

Group:

Group:

Group:

Group:

Group:

Group:

Field

Description

Loyalty Only

Select whether the offer is only available to loyalty members.

Field	Description						
Birthday	<p>Select whether the offer is only available during the month of the loyalty member's birthday.</p> <p>For example, Annie was born in May, and receives a birthday offer. She can redeem this offer during the month of May, but not any other month.</p> <div data-bbox="496 600 1390 763" style="border: 1px solid orange; padding: 5px; margin: 10px 0;"> <p>Tip: You can use the mail-out filters to send birthday offers only to loyalty members who will have a birthday that month. See <i>Email Report Options</i> screen on page 379.</p> </div> <div data-bbox="496 770 1390 1010" style="border: 1px solid blue; padding: 5px; margin: 10px 0;"> <p>Note: Only existing loyalty members who have a valid date of birth recorded in the Portal are eligible to redeem a birthday offer. Their loyalty card must be included in the transaction to redeem the offer. The default empty date of January 1st 1900 is not a valid date of birth.</p> </div>						
Option	<p>Select if the offer is available to:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr> <td data-bbox="517 1171 608 1205">Ignore</td> <td data-bbox="799 1171 1331 1238">All loyalty members regardless of loyalty card type.</td> </tr> <tr> <td data-bbox="517 1312 692 1379">In Any Card Types</td> <td data-bbox="799 1312 1299 1379">Only loyalty members with a card type selected below.</td> </tr> <tr> <td data-bbox="517 1453 751 1520">Not In Any Card Types</td> <td data-bbox="799 1453 1347 1520">Only loyalty members with a card type not selected below.</td> </tr> </tbody> </table>	Ignore	All loyalty members regardless of loyalty card type.	In Any Card Types	Only loyalty members with a card type selected below.	Not In Any Card Types	Only loyalty members with a card type not selected below.
Ignore	All loyalty members regardless of loyalty card type.						
In Any Card Types	Only loyalty members with a card type selected below.						
Not In Any Card Types	Only loyalty members with a card type not selected below.						
Card Type	Select a card type to include or exclude.						

Field	Description
Option	Select if the offer is available to:
Ignore	All loyalty members regardless of loyalty group.
In Any Group	Only loyalty members belonging to any group selected below.
In All Groups	Only loyalty members belonging to all group selected below.
Not In Any Groups	Only loyalty members belonging to a group not selected below.
Group	Select a group to include or exclude.

Filters tab

Use this area to control whether the offer must be used in conjunction with a specific promotion, department or item purchase.

Field	Description
Department	Select to restrict the offer to a specific department.
Linked Promotion	Select a promotion to link the offer to, so that the offer only applies if the promotion is triggered. Note: This feature is not available in iZen Point of Sale.
Item	Type in the item code of one or more items to trigger the offer. Note: If you want to add multiple items, separate each item code with a semi-colon (;). For example: 345;2776;2355 .
All Items	Select if the offer can be triggered by all items.
Maximum Amount for Trigger	Type the maximum purchase amount that can trigger the offer.

Field	Description
Minimum Amount before Trigger	Type the minimum purchase amount that can trigger the offer.

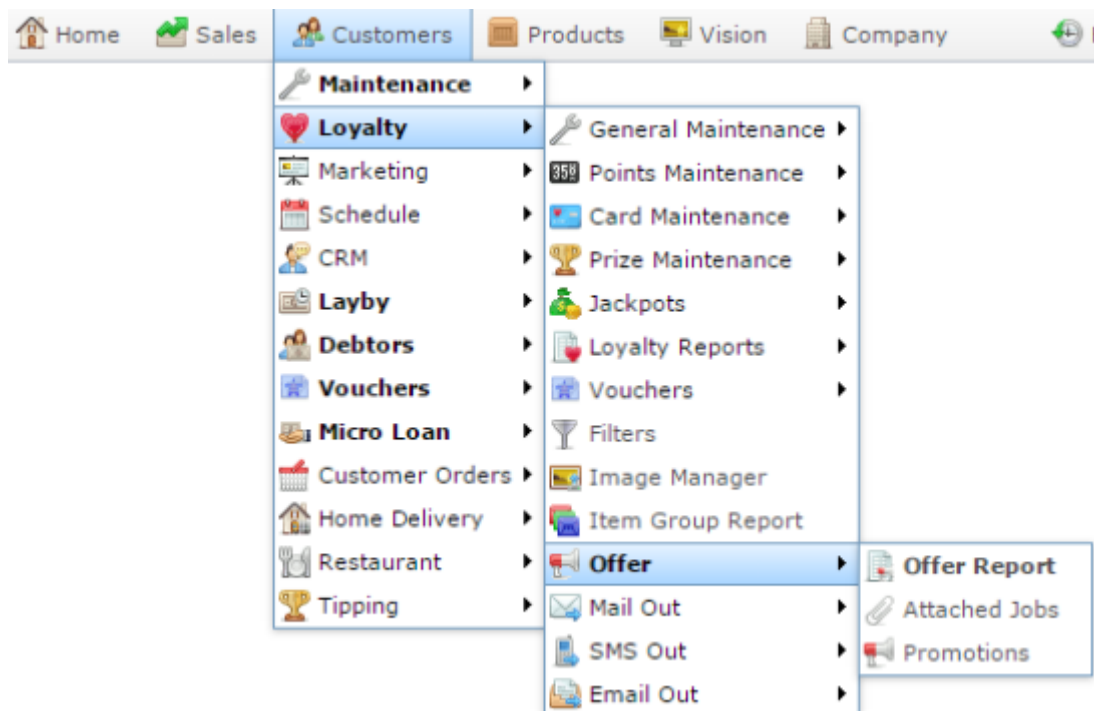
Offer Statistics report

Use the Offer Statistics report to view the sales and costs of offers from your company.

Opening the Offer Statistics report

To open the Offer Statistics report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Offer > Offer Report**.



The Offers report is displayed.

Offers Report For Dates Between Mon 08 Jun 2015 and Tue 08 Dec 2015

Description	Date Active	Expiry Date	Start Time	End Time	Offer Period	Reference	Loyalty	Enabled
End of Year	01 Dec 2015	16 Dec 2015	00:00	23:59	Full			✓

Date From: 8/06/2015

Date: 8/12/2015

Add to Favourites Create New Offer

3. Press the **Description** of the offer you want to view the statistics of.
A popup menu is displayed.

Offers Report For Dates Between Mon 23 Aug 2010 and Tue 23 Feb 2016

Description	Date Active	Expiry Date	Start Time	End Time	Offer Period	Reference	Loyalty	Enabled
Rainbow	07 Jan 2014	24 Jan 2015	00:00	23:00	Full	106		✓
Promo 5000	18 Jan 2011	31 Jul 2014	22:30	23:00	Day	268		✓
50% Off BL	11 Dec	25 Dec 2013	00:00	23:00	Full	BLT	✓	✓

[Edit Offer](#)
[Show Statistics](#)

Date From
23/08/2010

Date
23/02/2016

Add to Favourites

Create New Offer

4. Press **Show Statistics**.

Offer Statistics

Report Options

Offer Statistics - 50% Off BLT : 11 DEC 2013 To 25 DEC 2013				
Site	Sales	Amount	Count	Loyalty Custome
Total				

Statistics		
Information	Count	Cost
Jobs	0	
Emails	14	
SMS	25	
Loyalty Transactions	1	

States
VIC

Site
FLC

Filter
All Sales

Add to Favourites

Offer Statistics report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
States	Select a state or county to filter the report by.
Filter	Filter to exclude loyalty transactions or non-loyalty transactions from the reports.

Offer Statistics area

This area displays report information.

Field	Description
Site	The site the offer was enabled at.
Sales	The total sales relating to the offer.
Amount	The total amount given away.
Count	The number of transactions relating to the offer.
Loyalty Customers	The number of loyalty customers who used the offer.

Statistics area

This area displays the number of units and total cost of units in the transactions.


Field	Description
Jobs	The jobs used to send out the offer over email or SMS.
Emails	The emails used to send out the offer.
SMS	The SMS messages used to send out the offer.
Loyalty Transactions	The loyalty transactions resulting from the offer.

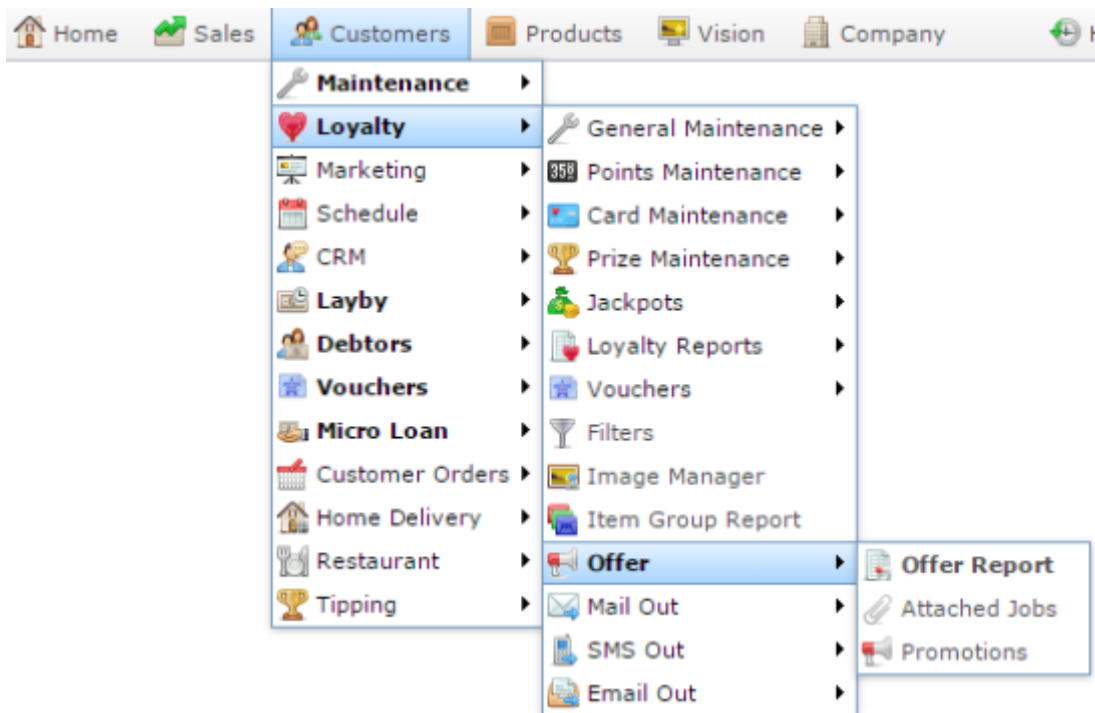
Promotion Offers report

Use the Promotion Offers report to view the promotion offers that have been sent to loyalty members.

Opening the Promotion Offers report

To open the Promotion Offers report:

1. Press  Customers from the menu bar.
2. Press **Loyalty > Offer > Promotions**.



The Promotion Offers report is displayed.

Promotion Offers Report

Offer	Promotion	Start Date	End Date	Items	Loyalty Only	Sent To Terminal
	Promotion 254	06 Aug 2014	06 Sep 2014	2		
	Bob	06 Aug 2014	06 Sep 2014	1		
	Impulse Run Out	16 Apr 2015	02 May 2015	2		
	FlashSale	05 May 2015	05 Jun 2015	1		

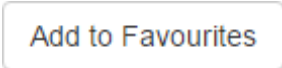
Site:

Offer:

Promotion Offers report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Offer	Select the offer to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / Description	The name of the relevant site.
Offer / Description	Name of the offer.
Promotion	Promotion the offer relates to.
Start Date / Active Date / Date Active	Date the offer starts.
End Date / Expiry Date	Date the offer ends.
Items	Number of items involved in the promotion.
Loyalty Only / Loyalty	Whether the offer is only available to loyalty members.

Field	Description
Sent To Terminal	Whether the promotion has been sent to the terminal.

Maintaining loyalty vouchers

You can convert loyalty points into vouchers for loyalty customers to redeem at your sites.

Also see:

- *Voucher Detail Maintenance screen* on page 318.
- *Loyalty Voucher Generation History report* on page 314.
- *Loyalty Voucher Generation report* on page 305.
- *Loyalty Voucher Printing report* on page 310


What you can do:

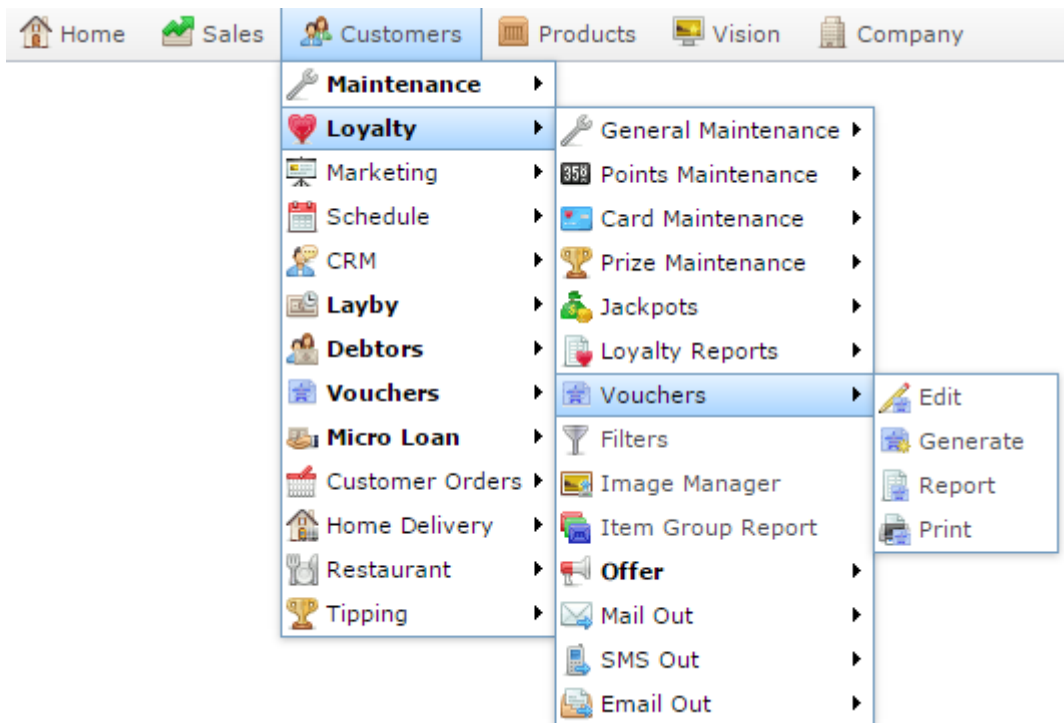
- *Creating a new voucher* on page 299.
- *Generating multiple loyalty vouchers* on page 301.
- *Printing loyalty vouchers* on page 303.

Creating a new voucher

Create a new voucher to send to loyalty members.

To create a new voucher:

1. Press  Customers.
2. Press **Loyalty > Vouchers > Edit**.

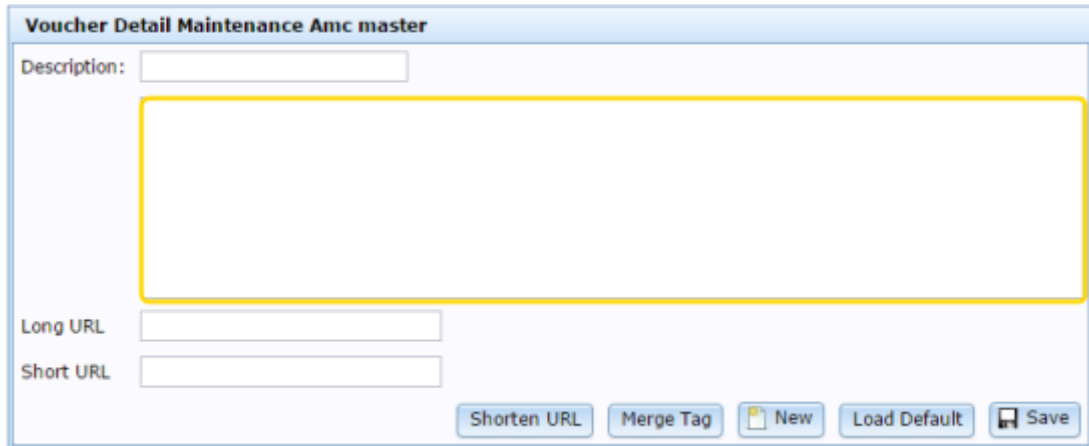


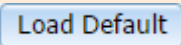
The Voucher Detail Maintenance screen is displayed.

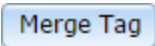
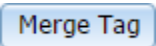
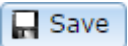
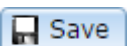
A screenshot of the 'Voucher Detail Maintenance Amc master' form. The form has a title bar and several input fields: 'Description:' with a text box, a large empty text area, 'Long URL' with a text box, and 'Short URL' with a text box. At the bottom, there are five buttons: 'Shorten URL', 'Merge Tag', 'New', 'Load Default', and 'Save'.

3. Press  New.

4. Type a name or description of the voucher in the **Description** field.
5. Type the voucher details in the body field.



Tip: If you have a standard voucher that you want to edit, press  to load it.

6. If you want to personalise the voucher, press  to select a merge tag to add in the current cursor position.
7. If you want to shorten a URL:
 1. Type it into the **Long URL** field, and press .
 2. Copy the **Short URL** to the mail out message.
8. Press .
The mail out is saved.
9. Press .
The voucher is saved.

Generating multiple loyalty vouchers

You can generate loyalty vouchers for multiple loyalty customers at a time using the Loyalty Voucher Generation report.


Note: You can generate individual vouchers for loyalty members using the Loyalty Maintenance screen. See *Creating a loyalty voucher from loyalty points* on page 78.

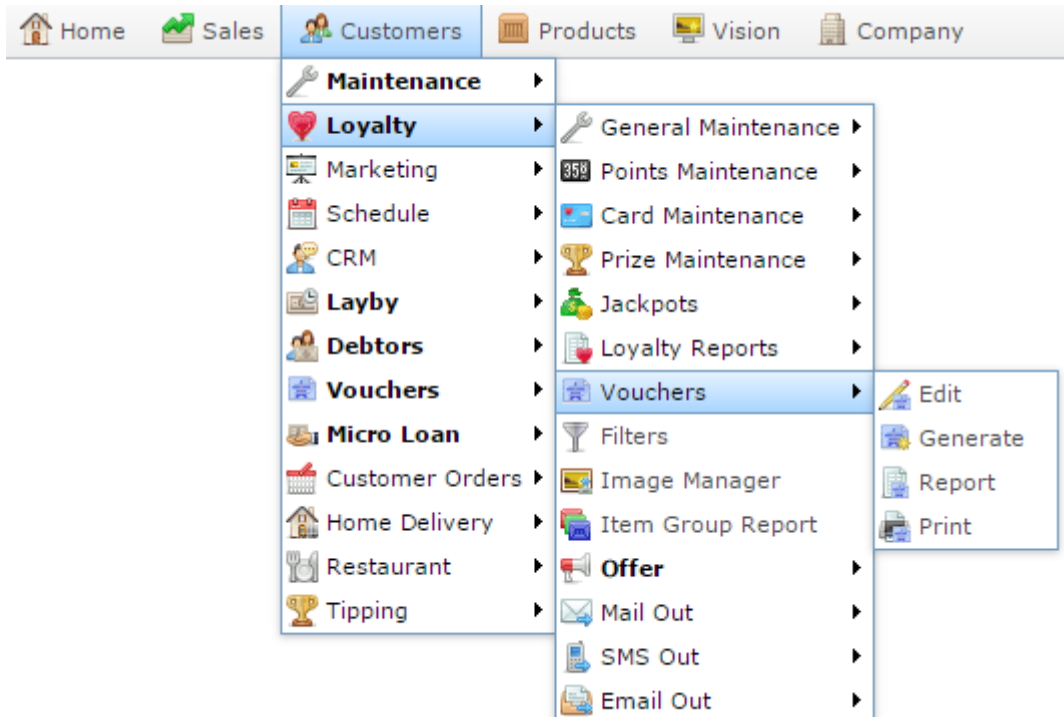
To generate vouchers:

1. Check the loyalty points redemption value you want to use in the **Default Redeemed Points Ratio** field in the Defaults tab of the Company Maintenance screen.

Vouchers are generated using this redemption ratio. For example, if the **Default Redeemed Points Ratio** is 25, then a voucher of \$1 requires 25 loyalty points, and a voucher of \$20 requires 500 loyalty points.

See *Company Maintenance screen*.

2. Press  **Customers** from the menu bar.
3. Press **Loyalty > Voucher > Generate**.



The Loyalty Voucher Generation report is displayed.

Loyalty Voucher Generation Report

Name	Card	Gender	Email	Points	Percentage Points	Vouchers	Value
Create Vouchers					0.00%		
New Card	2100999999			153,998.1	62.86%	123.0	\$6,150.00
Bob Bird	501	Female	test@epost	54,078.6	22.08%	43.0	\$2,150.00
John Flanagan	2100000000	Male	acs_john@	16,713.5	6.82%	13.0	\$650.00
Bob Bird	2100000000	Male	birdc@yah	2,778.0	1.13%	2.0	\$100.00
Bob Bird	2100777777	Male	test@epost	2,640.7	1.08%	2.0	\$100.00
New	2100000000			2,255.4	0.92%	1.0	\$50.00
noel clavecilla	2100000000		noelclave@	2,255.4	0.92%	1.0	\$50.00
Bob Bird	1000006707		test@systr	1,935.5	0.79%	1.0	\$50.00
New Card	2100101014			1,870.5	0.76%	1.0	\$50.00
Bob Bird	123456789			1,866.8	0.76%	1.0	\$50.00
New	2100000000			1,595.0	0.65%	1.0	\$50.00
noel clavecilla	2100000000		noelclave@	1,595.0	0.65%	1.0	\$50.00
RIMA ZABANEH	2100200936	Female	clive@ultip	1,386.0	0.57%	1.0	\$50.00
Total				244,968.6	100%	191.0	\$9,550.00

Voucher Amount

50

Add to Favourites


4. Select the value of the voucher you want to generate in the **Voucher Amount** field.
5. The report recalculates the vouchers to be generated.
6. Press **Create Vouchers**.
7. The vouchers are generated and can be printed using the Print Vouchers report.
8. See *Loyalty Voucher Printing report* on page 310.

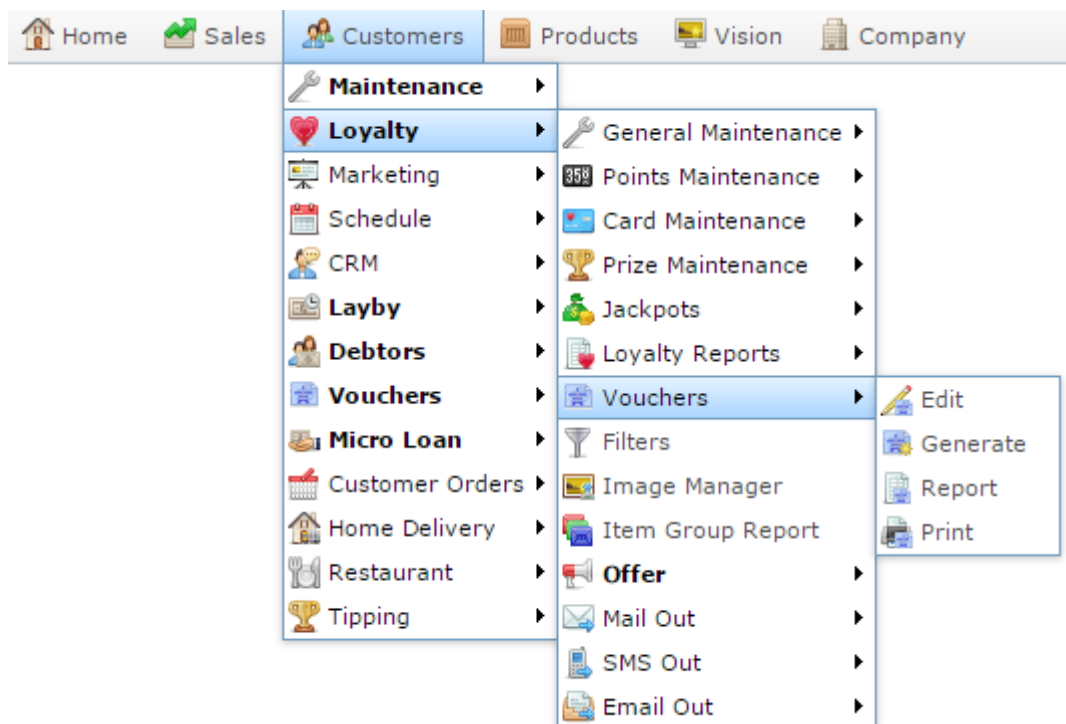
Printing loyalty vouchers

You can print generated loyalty vouchers to send to loyalty members using the Loyalty Voucher Printing report.

Note: Vouchers must be generated before they can be printed. See *Generating multiple loyalty vouchers* on page 301.

To print loyalty vouchers:



1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Vouchers > Print**.



The Loyalty Voucher Printing report is displayed.

Loyalty Voucher Printing Report

Batch Number	Date	Value	Points	Vouchers
Total				

Voucher Type

Date After

Maintaining loyalty
vouchers

3. Select the voucher type and date the batch was generated using the filter fields.
See *Loyalty Voucher Printing report* on page 310.
4. Press the **Batch Number** of the batch of vouchers you want to print.
The vouchers are printed.

Loyalty Voucher Generation report

Use the Loyalty Voucher Generation report to convert customers' loyalty points into vouchers of a specific value. The report displays:

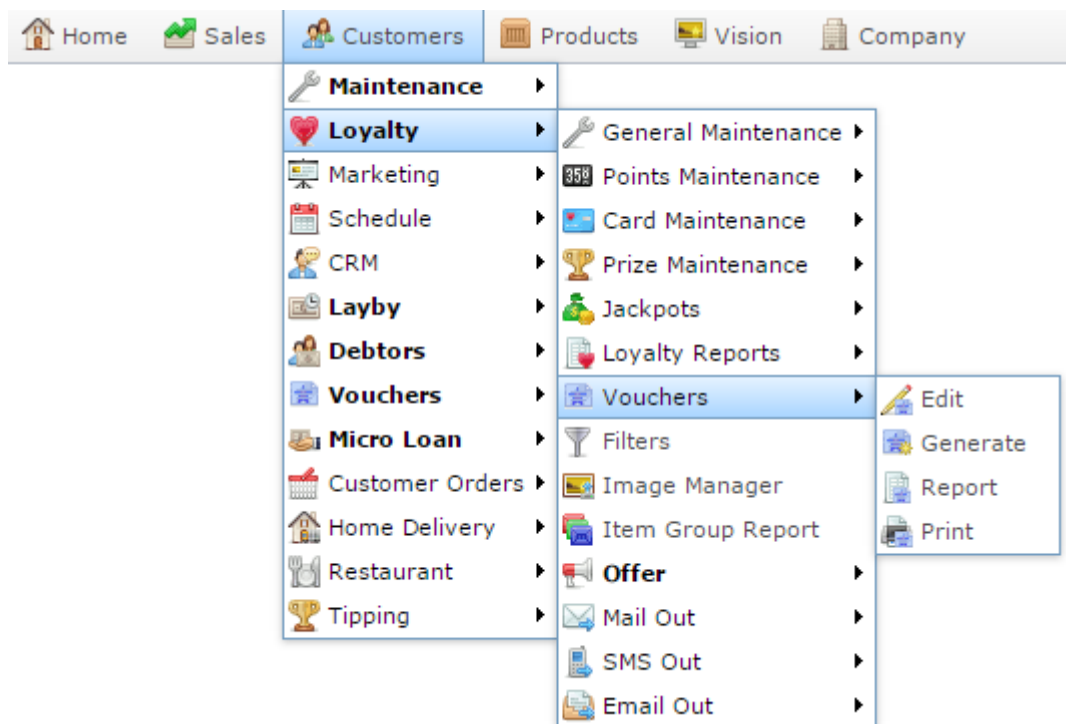
- The loyalty members who will receive vouchers if generated at the selected amount.
- The number of vouchers each loyalty member will receive.
- The value in points and dollars of the vouchers.

You can select the voucher value from the filter area. The Portal uses the default points redemption ratio. See *Company Maintenance screen*.

Opening the Loyalty Voucher Generation report

To open the Loyalty Voucher Generation report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Vouchers > Generate**.



The Loyalty Voucher Generation report is displayed.

Loyalty Voucher Generation Report

Name	Card	Gender	Email	Points	Percentage Points	Vouchers	Value
Create Vouchers					0.00%		
New Card	2100999999			153,998.1	62.86%	123.0	\$6,150.00
Bob Bird	501	Female	test@epos	54,078.6	22.08%	43.0	\$2,150.00
John Flanagan	2100000000	Male	acs_john@	16,713.5	6.82%	13.0	\$650.00
Bob Bird	2100000000	Male	birdc@yah	2,778.0	1.13%	2.0	\$100.00
Bob Bird	2100777777	Male	test@epos	2,640.7	1.08%	2.0	\$100.00
New	2100000000			2,255.4	0.92%	1.0	\$50.00
noel clavecilla	2100000000		noelclave@	2,255.4	0.92%	1.0	\$50.00
Bob Bird	1000006701		test@sysstr	1,935.5	0.79%	1.0	\$50.00
New Card	2100101010			1,870.5	0.76%	1.0	\$50.00
Bob Bird	123456789			1,866.8	0.76%	1.0	\$50.00
New	2100000000			1,595.0	0.65%	1.0	\$50.00
noel clavecilla	2100000000		noelclave@	1,595.0	0.65%	1.0	\$50.00
RIMA ZABANEH	2100200930	Female	clive@ultip	1,386.0	0.57%	1.0	\$50.00
Total				244,968.6	100%	191.0	\$9,550.00

⋮

Voucher Amount


50 ➤

Add to Favourites

Loyalty Voucher Generation report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Voucher Amount	Select the voucher amount to create. The report is filtered to display the customers who are eligible for a voucher of this amount, and the number of vouchers they would receive.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name / Card / Customer	Name of the loyalty member or customer.
Card # / Card	The card number identifying the loyalty member.
Gender	The loyalty member's gender.
Email	The loyalty member's email address.
Points	The number of points this loyalty member has accrued but not redeemed that can be converted into the vouchers.
Percentage Points	The percentage of the total converted points owned by this loyalty member.
Vouchers	The number of vouchers created.

Field	Description
Value	The total dollar value of the vouchers.


Loyalty Voucher Printing report

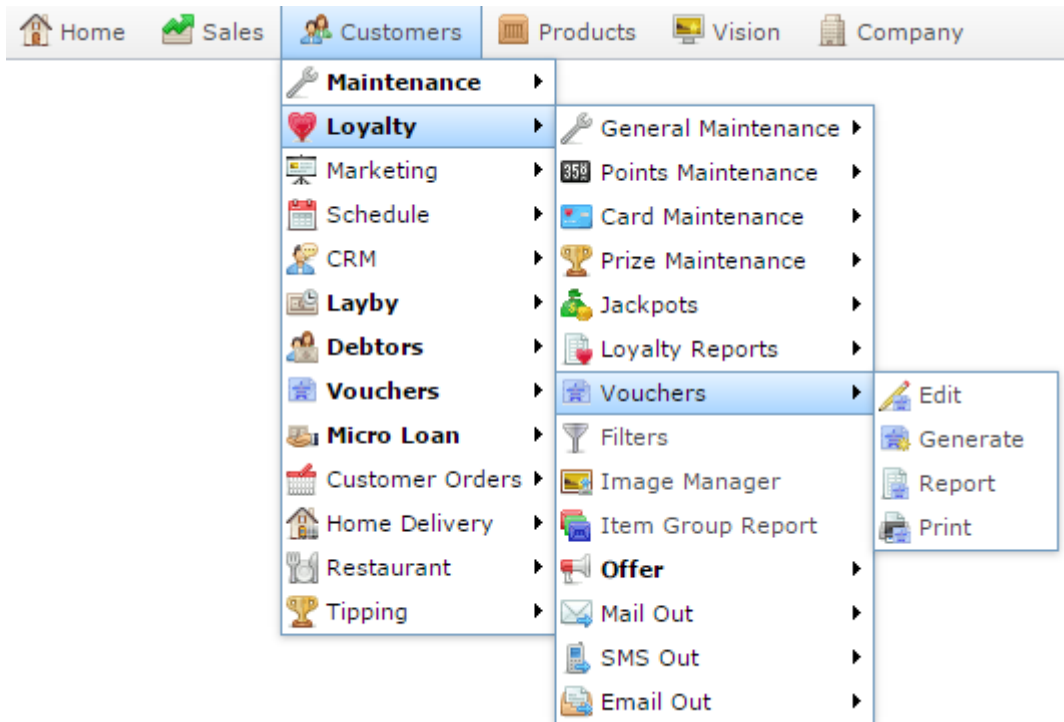
Use the Loyalty Voucher Printing report to view batches of loyalty vouchers that have been generated.

Note: You must generate loyalty vouchers before you can print them. See *Loyalty Voucher Generation report* on page 305.

Opening the Loyalty Voucher Printing report

To open the Loyalty Voucher Printing report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Vouchers > Print**.



The Loyalty Voucher Printing report is displayed.

Loyalty Voucher Printing Report

Batch Number	Date	Value	Points	Vouchers
Total				

Voucher Type

Date After

Add to Favourites

Loyalty Voucher Printing report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Date /	Select the date or date period to report on.
Date From and Date To /	
As of /	
Start Date and End Date	
Voucher Type / Type	Select the type of voucher to display.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.


Field	Description
Batch Number	Batch number of the print run.
Date	Date the print run was created.
Value	Total value of the vouchers printed.
Points	Total number of loyalty points represented by the vouchers.
Vouchers	Number of vouchers printed.

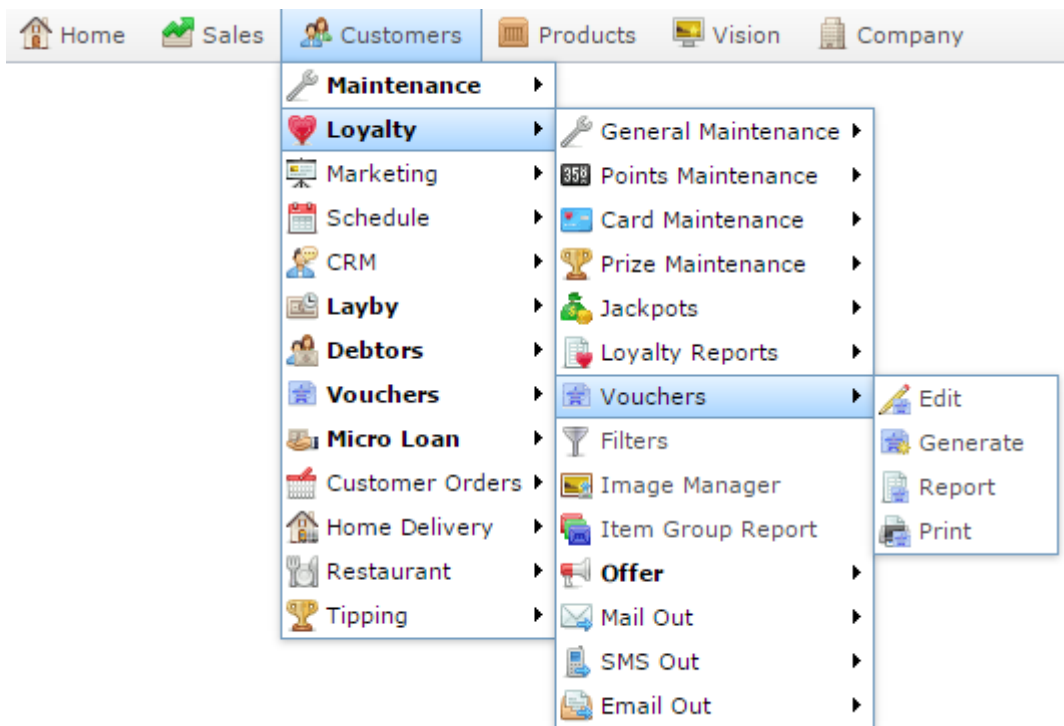
Loyalty Voucher Generation History report

Use the Loyalty Voucher Generation History report to view vouchers that have been created and redeemed for loyalty customers.

Opening the Loyalty Voucher Generation History report

To open the Loyalty Voucher Generation History report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Vouchers > Report**.



The Loyalty Voucher Generation History report is displayed.



Loyalty Voucher Generation History report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Date /	Select the date or date period to report on.
Date From and Date To /	
As of /	
Start Date and End Date	

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name / Card / Customer	Name of the loyalty member or customer.
Card # / Card	The card number identifying the loyalty member.
Batch	The batch the voucher was generated in.
Voucher	Barcode identifying the voucher.
Date	Date the voucher was generated.
Printed	Whether or not the voucher was printed.
Print Date	Date the voucher was printed.
Redeemed	Whether the voucher has been redeemed.


Field	Description
Redeem Date	Date the voucher was redeemed.
Points	Total number of points the voucher was worth.
Pre Balance	Loyalty points before voucher generation, used to confirm the Portal's points calculation was correct.
Post Balance	Loyalty points after voucher generation, used to confirm the Portal's points calculation was correct.
Value	Value of the voucher.

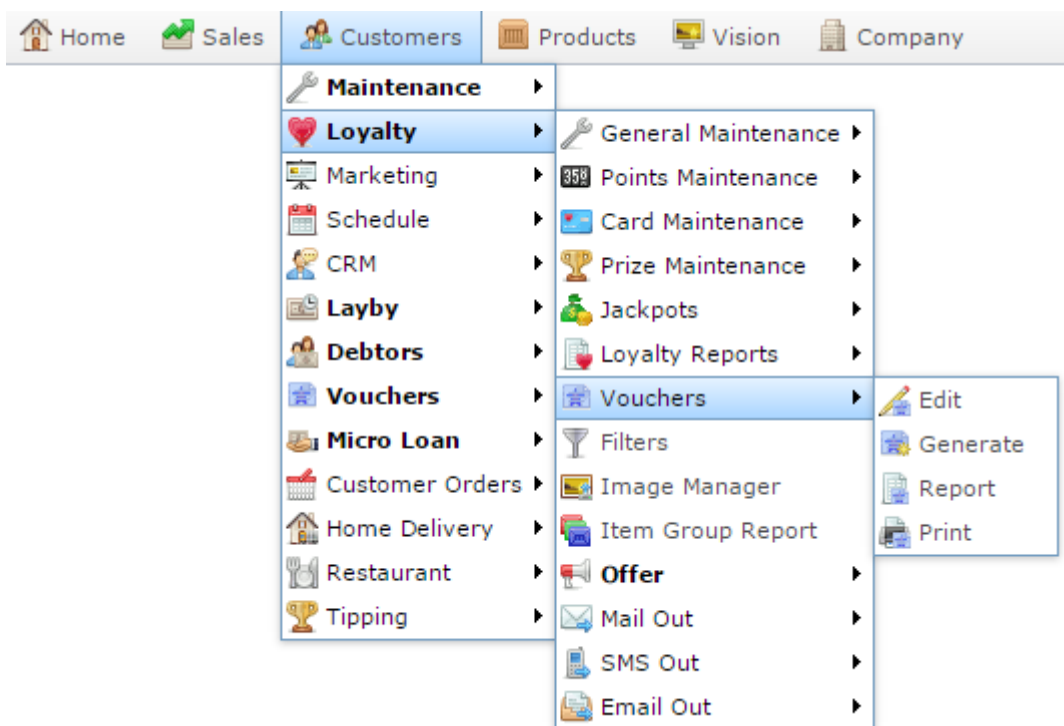
Voucher Detail Maintenance screen

Use this screen to design and personalise vouchers to be generated.

Opening the Voucher Detail Maintenance screen

To open the Voucher Detail Maintenance screen:

1. Press  Customers.
2. Press **Loyalty > Vouchers > Edit**.



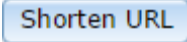
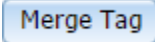
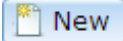
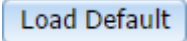
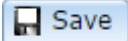
The Voucher Detail Maintenance screen is displayed.



The screenshot shows the 'Voucher Detail Maintenance Amc master' form with the following fields and buttons:

- Description:
- Long URL:
- Short URL:
- Buttons: Shorten URL, Merge Tag, New, Load Default, Save

Voucher Detail Maintenance screen key fields and buttons

Field	Description
Description	Describe the voucher template.
Body	Type the message to appear on loyalty vouchers.
Long URL	Copy a long URL into this field to shorten it.
Short URL	Shortened URL you can copy into the body.
 Shorten URL	Press to convert a long URL into a short URL.
 Merge Tag	Press to use a merge tag to personalise the voucher.
 New	Press to create a new voucher template.
 Load Default	Press to load the default voucher template for editing.
 Save	Press to save changes to the voucher template.

Managing frequent shopper items

Create frequent shopper items to control how loyalty points are rewarded or redeemed for specific items.

Also see:

- *Frequent Shopper Item Maintenance screen* on page 346.
- *Loyalty Items report* on page 342.

What you can do:

- *Creating a frequent shopper item* on page 321.
- *Creating a card-exclusive frequent shopper item that requires a purchase minimum* on page 327.
- *Create a frequent shopper item that is discounted on a specific week night* on page 332.
- *Finding a frequent shopper item* on page 325
- *Editing a frequent shopper item* on page 336.
- *Expiring a frequent shopper item* on page 338.
- *Deleting a frequent shopper item* on page 340.

Creating a frequent shopper item

Create a frequent shopper item to assign special loyalty rewards, discounts or bonuses to a particular item for a specified time. A Frequent Shopper Item loyalty reward overrides any loyalty department settings, card type discount and points settings or company settings.

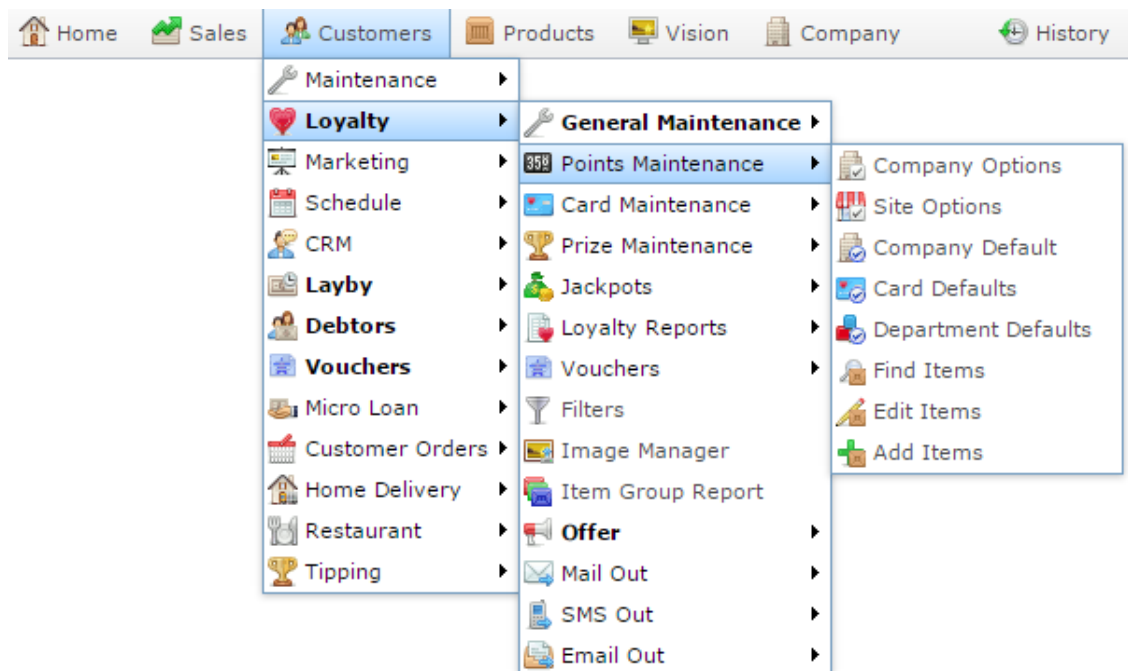
Note: To receive frequent shopper discounts or redemption rules you must use PosPortal Point of Sale system.

Note: More detailed settings can be added once the item has been added as a frequent shopper item. See *Frequent Shopper Item Maintenance* screen on page 346.

Tip: You can create multiple items from the same search results page if they have the same settings.

To create a frequent shopper item:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Add Items.**



The Add Frequent Shopper Item screen is displayed.

Managing frequent shopper items

Add Frequent Shopper Item

Add Items To: Chadstone Company: Example company

Start Date: 25 Sep 2015 End Date: 02 Oct 2015 Select All

Points per \$: 1 Bonus: 0 Discount: 0 Redeem Points per \$: 25

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Description: Item Code: Barcode:

Add Selected Items Search

3. Search for items to add.

See *Finding an item using the search screen*.

The search results are displayed.

Add Frequent Shopper Item

Add Items To: Chadstone Company: Example company

Start Date: 30 Sep 2015 End Date: 07 Oct 2015 Select All

Points per \$: 1 Bonus: 0 Discount: 0 Redeem Points per \$: 25

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Description: shirt Item Code: Barcode:

Items containing 'shirt'

Shirt (Black, Regular, L) (34000987) Shirt (White, Regular, L) (30000759)
 Shirt (Black, Regular, Small) (34000978) Shirt (White, Regular, Small) (34000979)

Add Selected Items Search

4. Select the items you want to create as frequent shopper items, or press **Select All** to select all displayed items.

Add Frequent Shopper Item

Add Items To: Chadstone ▾ **Start Date:** 30 Sep 2015 Select All
Company: Example company **End Date:** 07 Oct 2015
Points per \$: 1 **Bonus:** 0
Discount: 0 **Redeem Points per \$:** 25

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Description: shirt
Item Code:
Barcode:

Items containing 'shirt'

Shirt (Black, Regular, L) (34000987) Shirt (White, Regular, L) (30000759)
 Shirt (Black, Regular, Small) (34000978) Shirt (White, Regular, Small) (34000979)

Add Selected Items Search

Note: Do not search for more items until you have finished adding these items. If you search again, any information added to the frequent shopper fields is lost, and the items are not added.

5. Select the site to create frequent shopping items at in the **Add Items To** drop-down list.
6. Type the date range these settings should apply to the selected items in the **Start Date** and **End Date** fields.

Add Frequent Shopper Item

Add Items To: Chadstone ▾ **Start Date:** 30 Sep 2015 Select All
Company: Example company **End Date:** 07 Oct 2015
Points per \$: 1 **Bonus:** 0
Discount: 0 **Redeem Points per \$:** 25

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Description: shirt
Item Code:
Barcode:

Items containing 'shirt'

Shirt (Black, Regular, L) (34000987) Shirt (White, Regular, L) (30000759)
 Shirt (Black, Regular, Small) (34000978) Shirt (White, Regular, Small) (34000979)

Add Selected Items Search

7. Type the number of loyalty points that these items earn per dollar purchased in the **Points per \$** field.

Note: Only the amount purchased of this item in a transaction counts. For example, if you type **2 Points per \$**, then if the customer purchases \$10 worth of this item, they earn 20 points for these items.

8. Type the loyalty bonus that the loyalty member receives each time they purchase one of these items in the **Bonus** field.

Note: The loyalty bonus is received once for each unit of the item purchased per transaction, and the discount applies to all units of that item purchased in the transaction.

Add Frequent Shopper Item

Add Items To: Chadstone Company: Example company Start Date: 30 Sep 2015 End Date: 07 Oct 2015 Select All

Points per \$: 1 Bonus: 0 Discount: 0 Redeem Points per \$: 25

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Description: shirt Item Code: Barcode:

Items containing 'shirt'

Shirt (Black, Regular, L) (34000987) Shirt (White, Regular, L) (30000759)
 Shirt (Black, Regular, Small) (34000978) Shirt (White, Regular, Small) (34000979)

Add Selected Items Search

9. Type any discount percentage received by loyalty members for these items in the **Discount** field.
10. Type the number of points required to redeem one dollar when paying for this item in the **Redeem Points per \$** field.

For example, if the item is \$2, and you type **25 Redeem Points per \$**, the loyalty member uses 50 loyalty points to pay for one unit of this item in a transaction.

Tip: If you do not want this item to be purchased with loyalty points, type **0**.

11. Press **Add Selected Items**.

The frequent shopper items are added.

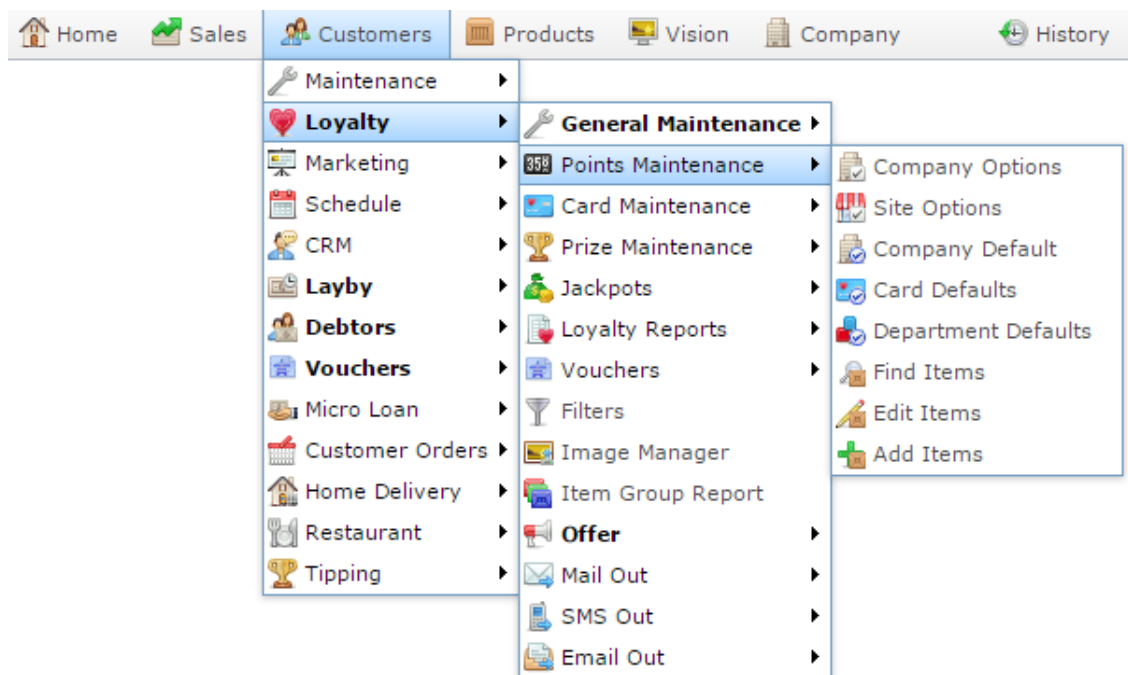
Finding a frequent shopper item

Find a frequent shopper item to edit its frequent shopper settings.

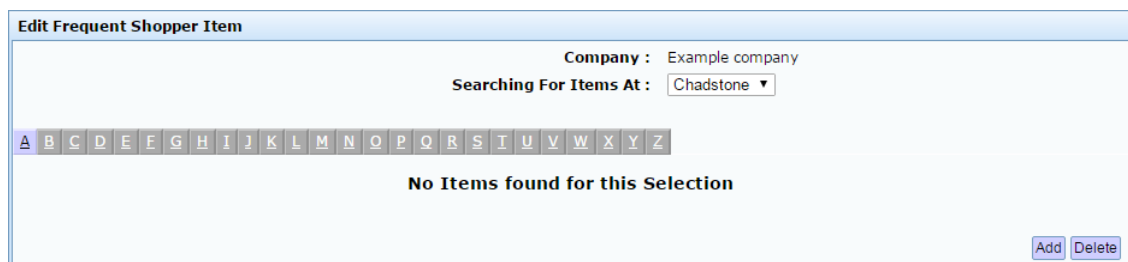
Note: An item must already be a frequent shopper item to be displayed in the Edit Frequent Shopper Item field. If you can't find the item, you may need to add it. See *Creating a frequent shopper item* on page 321.

To find a frequent shopper item:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Find Items.**



The Edit Frequent Shopper Item screen is displayed.



3. Select the site you want to edit in the **Searching For Items At** drop-down field.
4. Press the letter that the item's description starts with.

Managing frequent
shopper items

The list of frequent shopper items that start with that letter is displayed.

Creating a card-exclusive frequent shopper item that requires a purchase minimum

This is an example to show you how to create a complex frequent shopper item, such as an item that is only available to certain loyalty members, and requires a minimum purchase for rewards.

Note: An item must already be a frequent shopper item to be displayed in the Edit Frequent Shopper Item field. If you can't find the item, you may need to add it. See *Creating a frequent shopper item* on page 321.

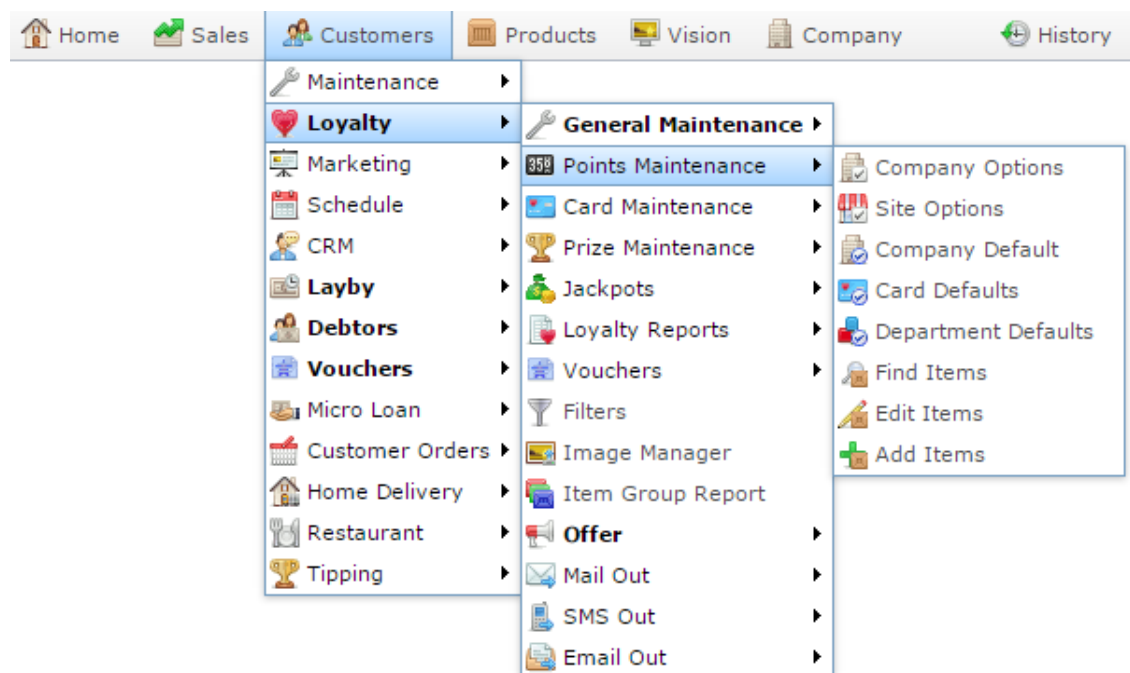
To create a card-exclusive frequent shopper item that requires a purchase minimum:

1. Create the basic frequent shopper item.

See *Creating a frequent shopper item* on page 321.

2. Press  Customers.

3. Press **Loyalty > Points Maintenance > Find Items.**



The Edit Frequent Shopper Item screen is displayed.

Managing frequent shopper items

Edit Frequent Shopper Item

Company : Example company

Searching For Items At : Chadstone ▼

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

No Items found for this Selection

Add Delete

4. Select the site you want to edit in the **Searching For Items At** drop-down field.
5. Press the letter that the item's description starts with.

The list of frequent shopper items that start with that letter is displayed.

6. Press the description of the item you want to edit.

Edit Frequent Shopper Item

Company : Example company

Searching For Items At : Chadstone ▼

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Banana Muffin (300)

Add Delete

The Frequent Shopper Item Maintenance screen is displayed.

Frequent Shopper Item Maintenance

Site: Chadstone Company : Example company

Item Code: 300

Item Description: Banana Muffin

Dates Points Discount Redemption Clubs Control Loyalty

Item: 300

Item Description: Banana Muffin

Active Date: 24/09/2015 ▼

Expiry Date: 1/10/2015 ▼

Update Delete

See *Frequent Shopper Item Maintenance* screen on page 346.

7. Edit the **Active Date** and **Expiry Date** fields to display the date range you want the frequent shopper item to run.
8. Press the Points tab.

The Points tab is displayed.

Frequent Shopper Item Maintenance

Site: Chadstone Company : Example company

Item Code: 300

Item Description: Banana Muffin

Dates Points Discount Redemption Clubs Control Loyalty

Minimum Points Sales:

Points:

Minimum Bonus Sales:

Bonus:

9. Type the minimum amount of this item that must be purchased in order for the loyalty rewards to apply in the **Minimum Points Sales** field.

For example, if the loyalty member must purchase at least \$15 worth of this item, type **15**.

10. Type the number of points the loyalty member receives per dollar spent on this item in the **Points** field.
11. Press the Loyalty tab.

The Loyalty tab is displayed.

Managing frequent shopper items

Frequent Shopper Item Maintenance

Site: Chadstone Company : Example company

Item Code: 300

Item Description: Banana Muffin

Dates Points Discount Redemption Clubs Control **Loyalty**

Option: Ignore

Card Type 1: Default

Card Type 2: Default

Card Type 3: Default

Card Type 4: Default

Card Type 5: Default

Option: Ignore

Group 1: QA Loyalty Scheme

Group 2: QA Loyalty Scheme

Group 3: QA Loyalty Scheme

Group 4: QA Loyalty Scheme

Group 5: QA Loyalty Scheme

Update Delete

12. Select **In Any Card Types** in the **Option** drop-down field.
13. Select the card types you want to allow the frequent shopper item for in the **Card Type** fields.

Frequent Shopper Item Maintenance

Site: Chadstone Company : Example company

Item Code: 300

Item Description: Banana Muffin

Dates Points Discount Redemption Clubs Control **Loyalty**

Option: In Any Card Types

Card Type 1: FTG 50

Card Type 2: Default

Card Type 3: Default

Card Type 4: Default

Card Type 5: Default

Option: In Any Groups

Group 1: QA Loyalty Scheme

Group 2: QA Loyalty Scheme

Group 3: QA Loyalty Scheme

Group 4: QA Loyalty Scheme

Group 5: QA Loyalty Scheme

Update Delete

Note: You can limit the item to card types, to loyalty groups, or to a combination of card types and loyalty groups.

14. Press .

The item is created.

Create a frequent shopper item that is discounted on a specific week night

This is an example to show you how to create a complex frequent shopper item, such as an item that provides a discount only on certain days and times.

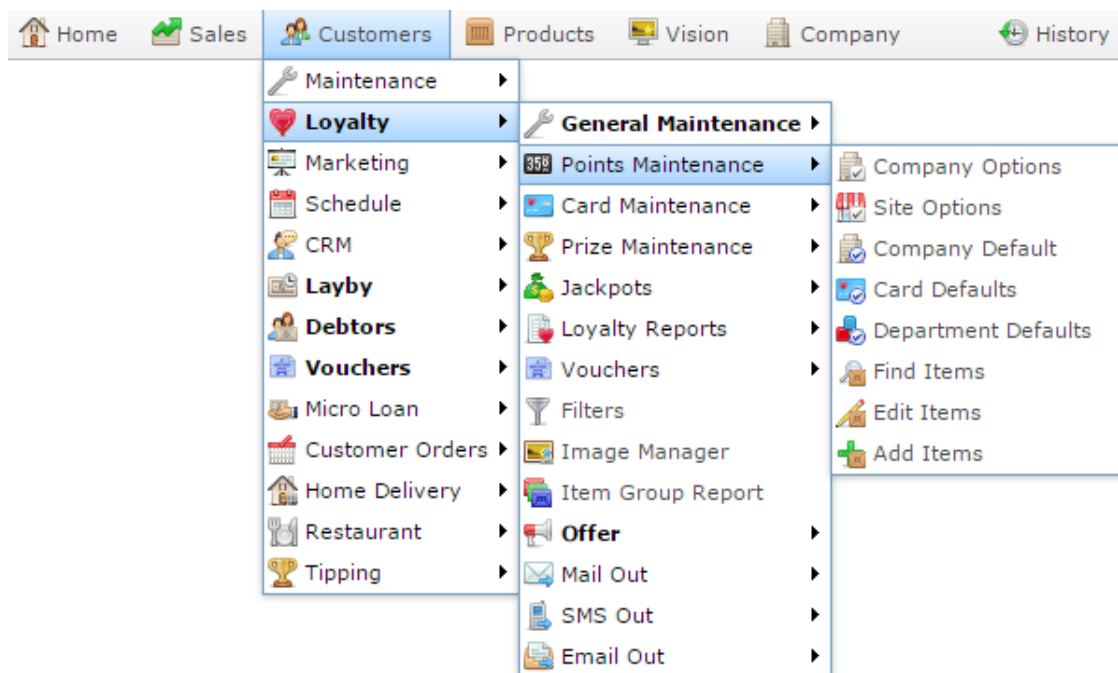
Note: An item must already be a frequent shopper item to be displayed in the Edit Frequent Shopper Item field. If you can't find the item, you may need to add it. See *Creating a frequent shopper item* on page 321.

To create a frequent shopper item that is discounted on Tuesday nights:

1. Create the basic frequent shopper item.

See *Creating a frequent shopper item* on page 321.

2. Press  Customers.
3. Press **Loyalty > Points Maintenance > Find Items.**



The Edit Frequent Shopper Item screen is displayed.

4. Select the site you want to edit in the **Searching For Items At** drop-down field.
5. Press the letter that the item's description starts with.
The list of frequent shopper items that start with that letter is displayed.
6. Press the description of the item you want to edit.

The Frequent Shopper Item Maintenance screen is displayed.

See *Frequent Shopper Item Maintenance* screen on page 346.

7. Edit the **Active Date** and **Expiry Date** fields to display the date range you want the frequent shopper item to run.
8. Press the Discount tab.
The Discount tab is displayed.

Managing frequent shopper items

The screenshot shows the 'Frequent Shopper Item Maintenance' form with the 'Discount' tab selected. The form header includes 'Site: Chadstone' and 'Company: Example company'. The item details are 'Item Code: 300' and 'Item Description: Banana Muffin'. The 'Discount' tab contains the following fields: 'Minimum Discount Sales' (empty text box), 'Discount:' (text box with '0'), 'Is Amount' (radio buttons for Yes and No), 'Allow Points With Discount' (radio buttons for Yes and No), and 'Allow Bonus Points With Discount' (radio buttons for Yes and No). At the bottom right, there are 'Update' and 'Delete' buttons.

9. Type the discount you want to apply to the item in the **Discount** field.
10. If the discount is a flat dollar amount, select **Yes** in the **Is Amount** field.
11. Press the Control tab.

The Control tab is displayed.

The screenshot shows the 'Frequent Shopper Item Maintenance' form with the 'Control' tab selected. The form header includes 'Site: Chadstone' and 'Company: Example company'. The item details are 'Item Code: 300' and 'Item Description: Banana Muffin'. The 'Control' tab contains the following fields: 'Day of Week' (checkboxes for Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday), 'Start Hour' (dropdown menu with 'Midnight'), 'Start Minute' (dropdown menu with '0 Minutes'), 'End Hour' (dropdown menu with 'Midnight'), and 'End Minute' (dropdown menu with '0 Minutes'). At the bottom right, there are 'Update' and 'Delete' buttons.

12. Clear all the **Day of Week** fields you don't want the discount active on. For example, every day except **Tuesday**.
13. Select **6 PM** in the **Start Hour** drop-down field.



Frequent Shopper Item Maintenance

Site: Chadstone Company : Example company
Item Code: 300
Item Description: Banana Muffin

Dates Points Discount Redemption Clubs Control Loyalty

Sunday
 Monday
 Tuesday
Day of Week: Wednesday
 Thursday
 Friday
 Saturday

Start Hour: 6 PM
Start Minute: 0 Minutes
End Hour: Midnight
End Minute: 0 Minutes

 Update  Delete

14. Press  .

The item is created.

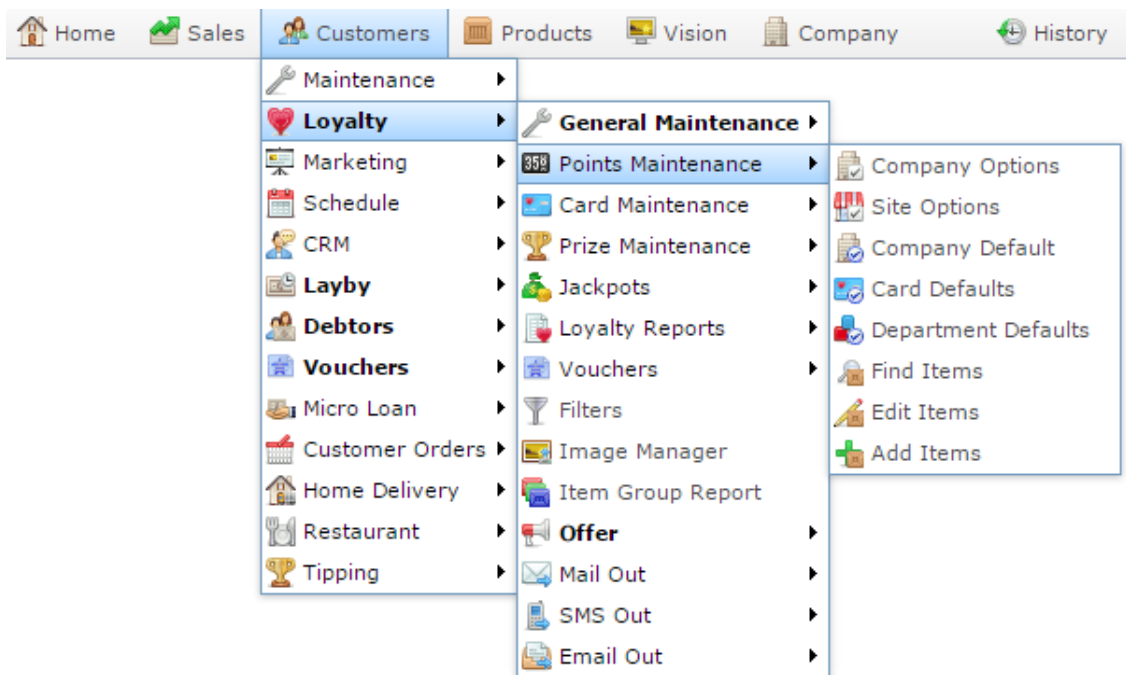
Editing a frequent shopper item

Edit a frequent shopper item to add more detailed settings to the date range and loyalty rewards of the item.

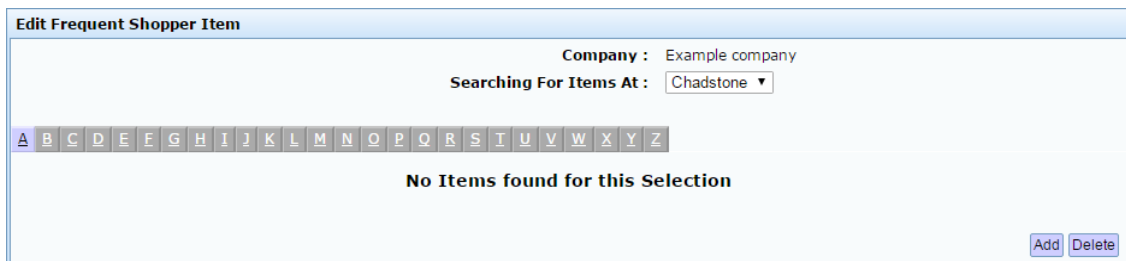
Note: An item must already be a frequent shopper item to be displayed in the Edit Frequent Shopper Item field. If you can't find the item, you may need to add it. See *Creating a frequent shopper item* on page 321.

To edit a frequent shopper item:

1. Press  **Customers**.
2. Press **Loyalty > Points Maintenance > Find Items**.



The Edit Frequent Shopper Item screen is displayed.



3. Select the site you want to edit in the **Searching For Items At** drop-down field.
4. Press the letter that the item's description starts with.

The list of frequent shopper items that start with that letter is displayed.

5. Press the description of the item you want to edit.

Edit Frequent Shopper Item

Company : Example company

Searching For Items At : Chadstone

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Banana Muffin (300)

Add Delete

The Frequent Shopper Item Maintenance screen is displayed.

Frequent Shopper Item Maintenance

Site: Chadstone Company : Example company

Item Code: 300

Item Description: Banana Muffin

Dates Points Discount Redemption Clubs Control Loyalty

Item: 300

Item Description: Banana Muffin

Active Date: 24/09/2015

Expiry Date: 1/10/2015

Update Delete

6. Edit the fields as required.

See *Frequent Shopper Item Maintenance* screen on page 346.

7. Press .

The item details are saved.

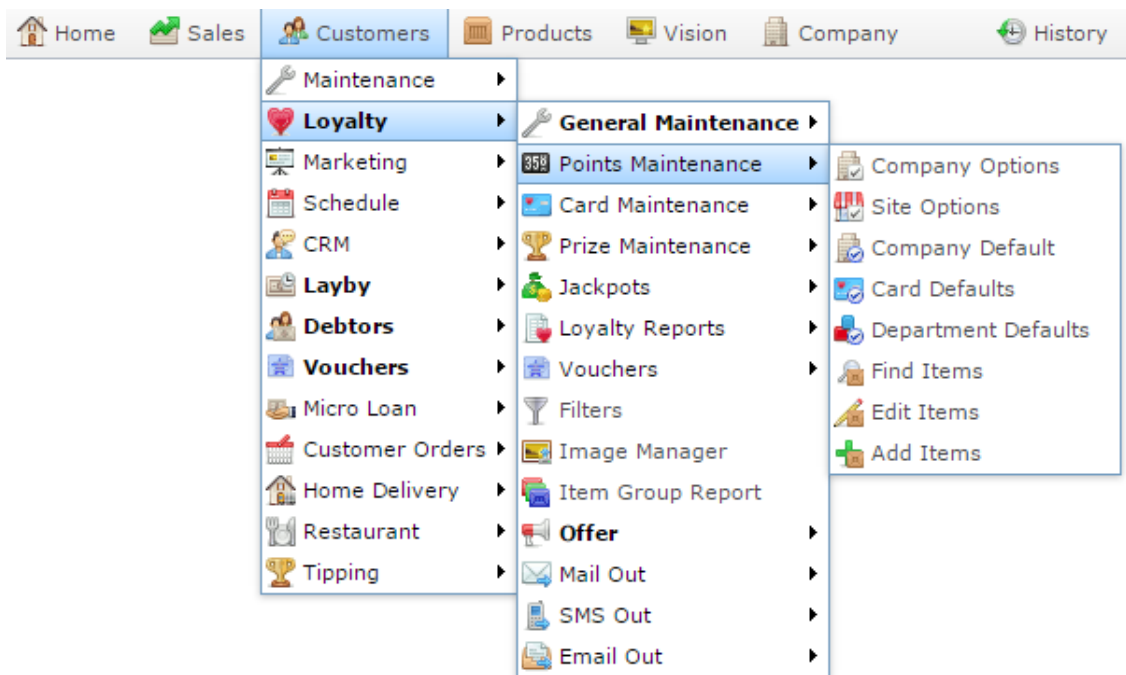
Expiring a frequent shopper item

Expire a frequent shopper item to stop its additional discounts, loyalty points or bonuses being applied without deleting the item.

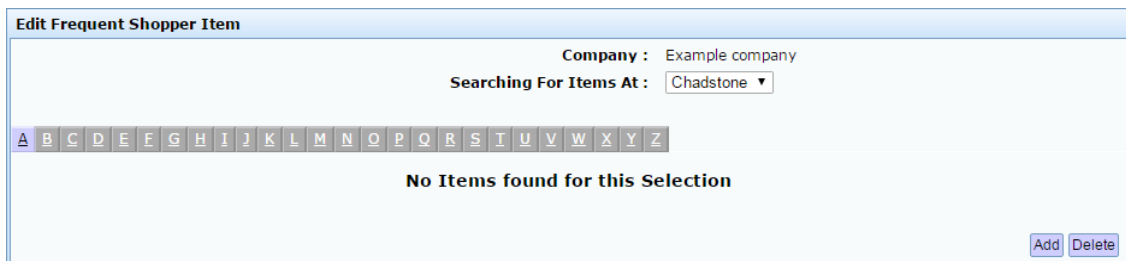
Note: An item must already be a frequent shopper item to be displayed in the Edit Frequent Shopper Item field. If you can't find the item, you may need to add it. See *Creating a frequent shopper item* on page 321.

To expire a frequent shopper item:

1. Press  **Customers**.
2. Press **Loyalty > Points Maintenance > Find Items**.



The Edit Frequent Shopper Item screen is displayed.



3. Select the site you want to edit in the **Searching For Items At** drop-down field.
4. Press the letter that the item's description starts with.

The list of frequent shopper items that start with that letter is displayed.

5. Press the description of the item you want to edit.

Edit Frequent Shopper Item

Company : Example company

Searching For Items At : Chadstone

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Banana Muffin (300)

Add Delete

The Frequent Shopper Item Maintenance screen is displayed.

Frequent Shopper Item Maintenance

Site: Chadstone Company : Example company

Item Code: 300

Item Description: Banana Muffin

Dates Points Discount Redemption Clubs Control Loyalty

Item: 300

Item Description: Banana Muffin

Active Date: 24/09/2015

Expiry Date: 1/10/2015

Update Delete

6. Select yesterday's date in the **Expiry Date** field.

Note: It doesn't matter what date you use, as long as the date is in the past.

See *Frequent Shopper Item Maintenance* screen on page 346.

7. Press  Update.

The item is expired.

Deleting a frequent shopper item

Delete a frequent shopping item to remove all frequent shopper settings from the Portal for this item.

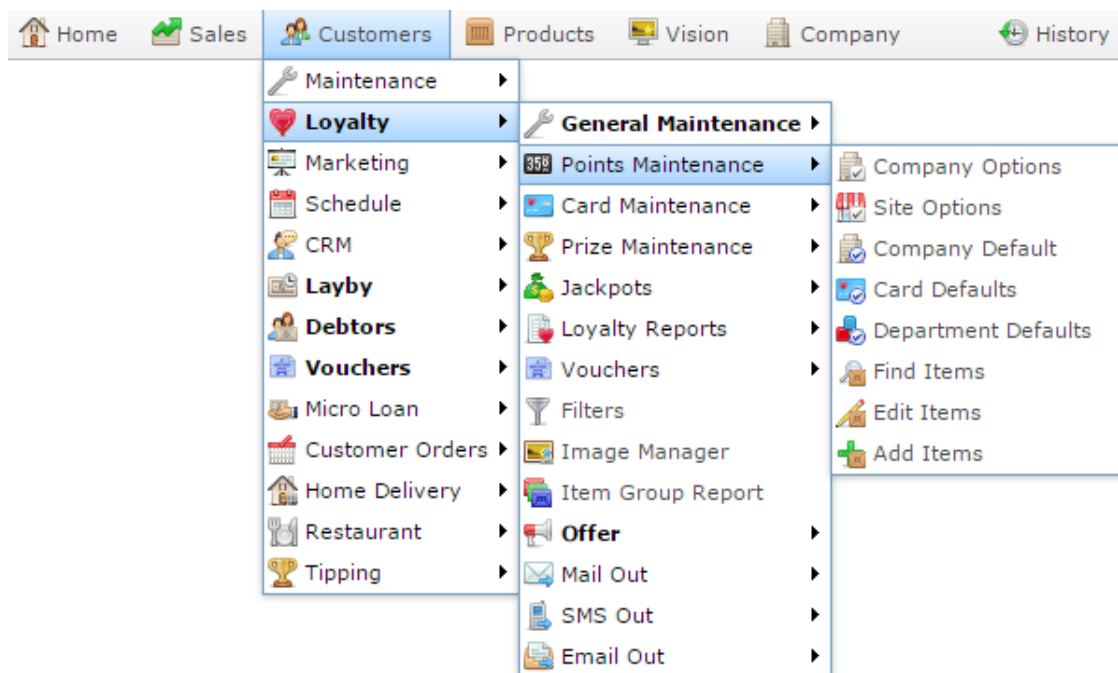
Note: Deleting a frequent shopper item does not delete the item itself from your inventory.

Note: You can expire a frequent shopper item instead of deleting it if you want to keep the frequent shopper item configuration without using it. See *Expiring a frequent shopper item* on page 338.

Note: An item must already be a frequent shopper item to be displayed in the Edit Frequent Shopper Item field. If you can't find the item, you may need to add it. See *Creating a frequent shopper item* on page 321.

To delete a frequent shopper item:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Find Items.**



The Edit Frequent Shopper Item screen is displayed.

Edit Frequent Shopper Item

Company : Example company

Searching For Items At : Chadstone ▼

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

No Items found for this Selection

Add Delete

3. Select the site you want to edit in the **Searching For Items At** drop-down field.
4. Press the letter that the item's description starts with.
The list of frequent shopper items that start with that letter is displayed.
5. Select the items you want to delete.

Edit Frequent Shopper Item

Company : Example company

Searching For Items At : Chadstone ▼

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Banana Muffin (300.)

Add Delete

6. Press **Delete**.
The frequent shopper item is deleted.

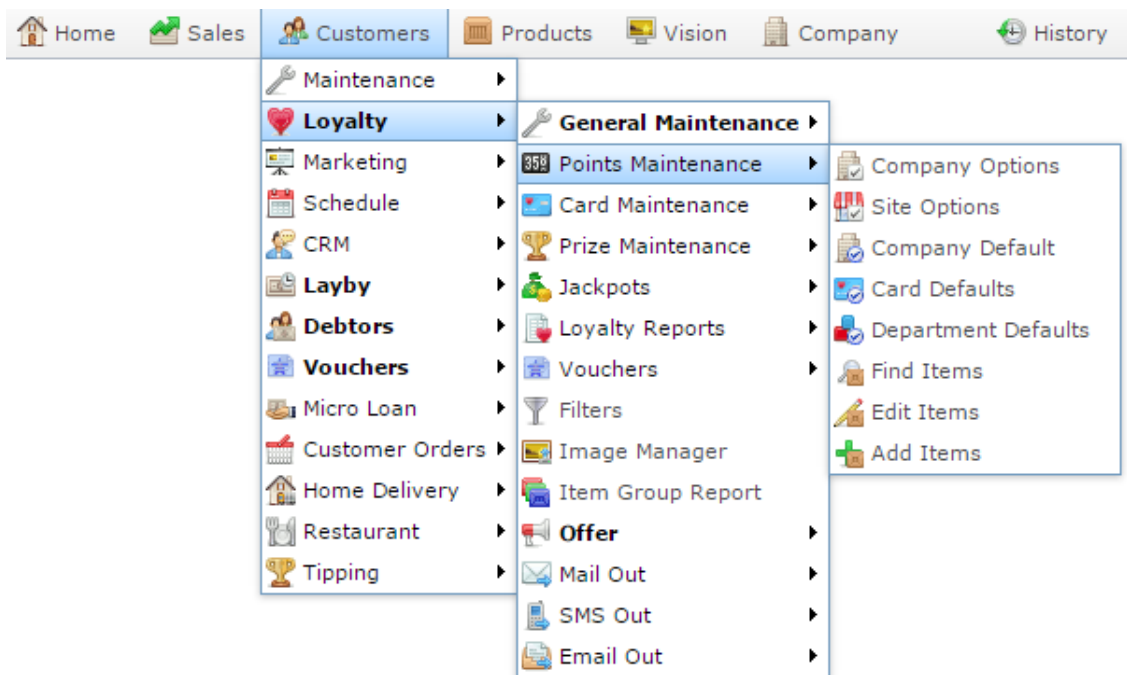
Loyalty Items report

Use the Loyalty Items report to view and edit the items that you have created special loyalty rules for. See *Frequent Shopper Item Maintenance* screen on page 346.

Opening the Loyalty Items report

To open the Loyalty Items report:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Edit Items.**



The Loyalty Items report is displayed.

Loyalty Items Report

Description	Item	Site	Start Date	End Date	Points	Bonus	Discount
Banana Muffin	300	Chadstone	24-Sep-2015	01-Oct-2015	1	0	0

Site
Chadstone

Brand
All

Supplier
All

By
Current

Add to Favourites

Loyalty Items report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Supplier / Creditor	Select to restrict the report to a particular supplier, or to items where the supplier has not been selected.
Brand / Group Ident	Filter the report to the selected brand.

Field	Description
By	Filter the report to loyalty items that are:
Current	Loyalty items that currently provide loyalty benefits.
Changed	Loyalty items that have been modified since they were created.
Pending	Loyalty items that have been created but do not provide loyalty benefits until a future date.
Expired	Loyalty items that have been created but no longer provide loyalty benefits.
Deleted	Loyalty items that have been deleted.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / Description	The name of the relevant site.
Item / Description	Description of the item. Note: Click on the description to access other options in a popup menu.
Item Number / Item	The item code of the item.
Start Date	Date this item starts providing loyalty benefits.
End Date	Date this item stops providing loyalty benefits.
Points	Additional loyalty points this item provides per dollar.
Bonus	Bonus loyalty points this item provides.
Discount	Discount this item provides to loyalty members.

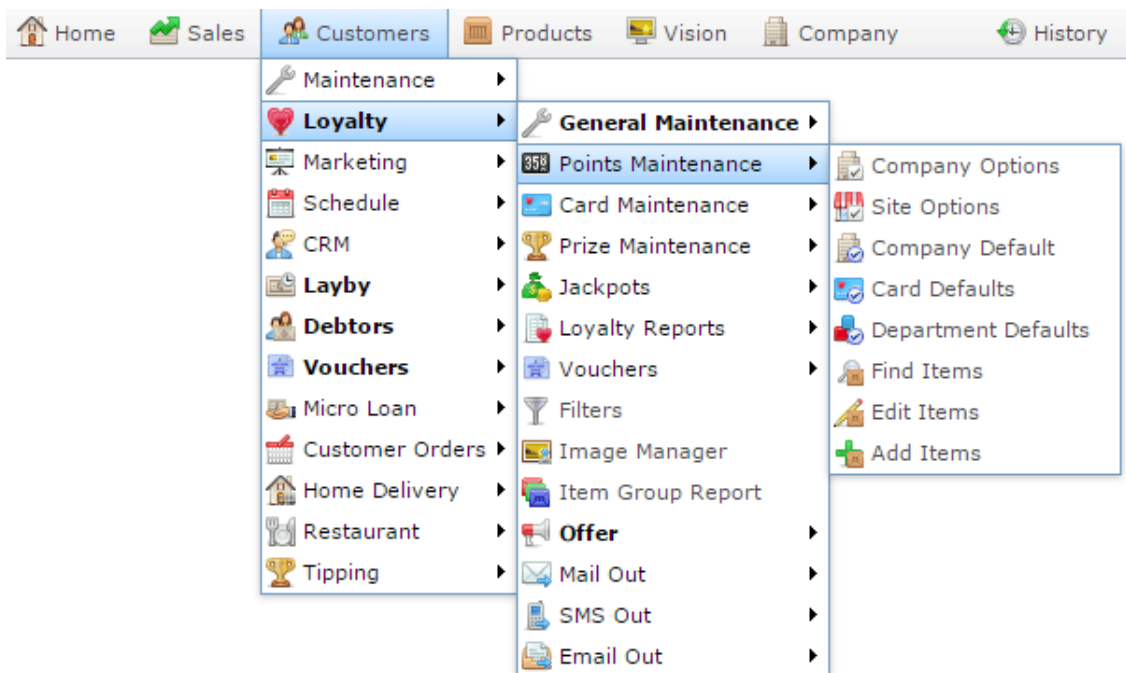
Frequent Shopper Item Maintenance screen

Use the Frequent Shopper Item Maintenance screen to control loyalty points, discounts and other customer rewards for specific items.

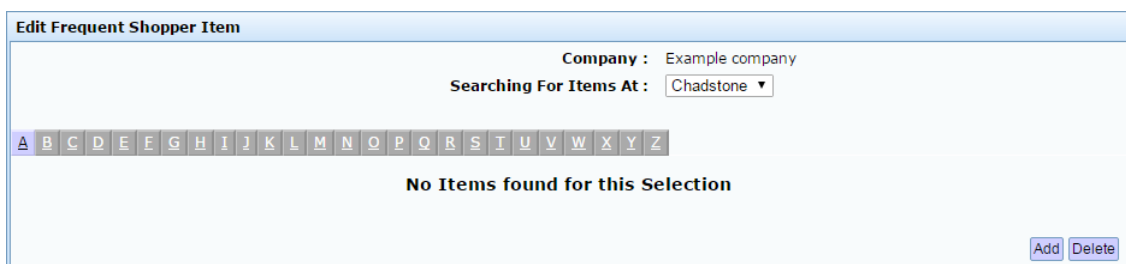
Opening the Frequent Shopper Item Maintenance screen

To open the Frequent Shopper Item Maintenance screen:

1. Press  Customers.
2. Press **Loyalty > Points Maintenance > Find Items.**



The Edit Frequent Shopper Item screen is displayed.



3. Find the frequent shopper item you want to edit.
See *Finding a frequent shopper item* on page 325.
4. Press the name of the frequent shopper item.

Edit Frequent Shopper Item

Company : Example company

Searching For Items At : Chadstone ▼

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Banana Muffin (300)

The Frequent Shopper Item Maintenance screen is displayed.

Frequent Shopper Item Maintenance

Site: Chadstone Company : Example company

Item Code: 300

Item Description: Banana Muffin

Dates Points Discount Redemption Clubs Control Loyalty

Item: 300

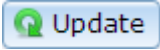

Item Description: Banana Muffin

Active Date: 24/09/2015 ▼

Expiry Date: 1/10/2015 ▼

Frequent Shopper Item Maintenance screen key fields and buttons

Common fields and buttons

Field	Description
Site	The site this frequent shopper setting applies to.
Item Code	Unique code identifying the item.
Item Description	Description of the item.
Company	The company this frequent shopper setting applies to.
	Press to save any changes made to the frequent shopping item.
	Press to remove the frequent shopping settings for this item and site.

Dates tab

Use the Dates tab to control when the frequent shopper item settings apply to this item.

Frequent Shopper Item Maintenance

Site: Chadstone Company : Example company

Item Code: 300

Item Description: Banana Muffin



Dates Points Discount Redemption Clubs Control Loyalty

Item: 300

Item Description: Banana Muffin

Active Date: 24/09/2015

Expiry Date: 1/10/2015

Field	Description
Item	Unique code identifying the item.
Item Description	Description of the item.
Active Date	Date the frequent shopper settings begin.
Expiry Date	Date the frequent shopper settings stop.

Points tab

Use the Points tab to control the minimum purchase required to earn loyalty points or bonuses for this item, and the loyalty points awarded.

Frequent Shopper Item Maintenance

Site: Chadstone Company : Example company

Item Code: 300

Item Description: Banana Muffin

Dates **Points** Discount Redemption Clubs Control Loyalty

Minimum Points Sales:

Points:

Minimum Bonus Sales:

Bonus:

Field	Description
Minimum Points Sales	Type the minimum purchase of this item required to earn loyalty member points.
Points	Type the number of points earned for this item.
Minimum Bonus Sales	Type the minimum purchase of this item required to earn loyalty member bonus points.
Bonus	Type the bonus earned for this item.

Field	Description
Is Amount	Select: <ul style="list-style-type: none"><li data-bbox="552 461 1318 528">▪ Yes if the Discount field is a flat amount to be deducted from the item's price, such as \$1.<li data-bbox="552 551 1369 618">▪ No if the Discount field is a percentage to be deducted from the item's price, such as 10%.
Allow Points With Discount	Select whether to allow the loyalty member to earn loyalty points for this item if they receive a discount.
Allow Bonus Points With Discount	Select whether to allow the loyalty member to earn bonus loyalty points for this item if they receive a discount.

Redemption tab

Use the Redemption tab to control how loyalty members can redeem points when purchasing this item.

Frequent Shopper Item Maintenance

Site: Chadstone Company : Example company

Item Code: 300

Item Description: Banana Muffin

Minimum Redeem Sales:

Points:

Allow Redeem Yes No

Field	Description
Minimum Redeem Sales	Type the minimum purchase of this item required to redeem loyalty points to purchase this item.
Points	Type the number of points required to purchase this item.
Allow Redeem	Select whether to allow this item to be purchased with loyalty points.

Control tab

Use the Control tab to control when the item's frequent shopper rewards apply within the date period.

Frequent Shopper Item Maintenance

Site: Chadstone Company : Example company
Item Code: 300
Item Description: Banana Muffin

Dates Points Discount Redemption Clubs **Control** Loyalty

Sunday
 Monday
 Tuesday
Day of Week: Wednesday
 Thursday
 Friday
 Saturday

Start Hour: Midnight
Start Minute: 0 Minutes
End Hour: Midnight
End Minute: 0 Minutes

[Update](#) [Delete](#)

Field	Description
Day of Week	Select which days of the week the frequent shopper item settings apply.
Start Hour	Select the hour of day the frequent shopper item settings apply from.
Start Minute	Select the minute past the hour that the frequent shopper item settings apply from.
End Hour	Select the hour of day the frequent shopper item settings stop applying.

Field	Description
End Minute	Select the minute past the hour that the frequent shopper item settings stop applying.

Loyalty tab

Use the Loyalty tab to control which loyalty cards and groups are eligible for the frequent shopper item.

Frequent Shopper Item Maintenance
Site: Chadstone Company : Example company
Item Code: 300
Item Description: Banana Muffin

Dates Points Discount Redemption Clubs Control **Loyalty**

Option: Ignore

Card Type 1: Default

Card Type 2: Default

Card Type 3: Default

Card Type 4: Default

Card Type 5: Default

Option: Ignore

Group 1: QA Loyalty Scheme

Group 2: QA Loyalty Scheme

Group 3: QA Loyalty Scheme

Group 4: QA Loyalty Scheme

Group 5: QA Loyalty Scheme

Update Delete

Field

Description

Field	Description
Option	<p>Select whether to:</p> <hr/> <p>Ignore Apply the frequent shopper item settings to all loyalty card types.</p> <hr/> <p>Apply to Card Types Apply the frequent shopper item settings only to loyalty card types selected in the Card Type drop-down fields.</p> <hr/> <p>Do not Apply to Card Types Do not apply the frequent shopper item settings to loyalty card types selected in the Card Type drop-down fields.</p>
Card Type	Select the loyalty card types to apply the option to.

Field	Description
Option	<p>Select whether to:</p> <hr/> <p>Ignore Apply the frequent shopper item settings to all loyalty groups.</p> <hr/> <p>Individual Categories Apply the frequent shopper item settings only to loyalty groups selected in the Group drop-down fields.</p> <hr/> <p>Not Individual Categories Do not apply the frequent shopper item settings to loyalty groups selected in the Group drop-down fields.</p>
Group	Select the loyalty groups to apply the option to.

Managing mail outs

You can use the Portal to create, edit and send mail outs via SMS, email and printed marketing materials.

Also see:

- *Email Report Options screen* on page 379.
- *Email Templates report* on page 388.
- *Mail Out Detail Maintenance screen* on page 391.
- *Mail Out Report Options screen* on page 393.
- *Sites Email report* on page 401.
- *SMS List report* on page 407.
- *SMS Detail Maintenance screen* on page 410.
- *SMS Report Options screen* on page 413.
- *Sites SMS Summary report* on page 420.

What you can do:

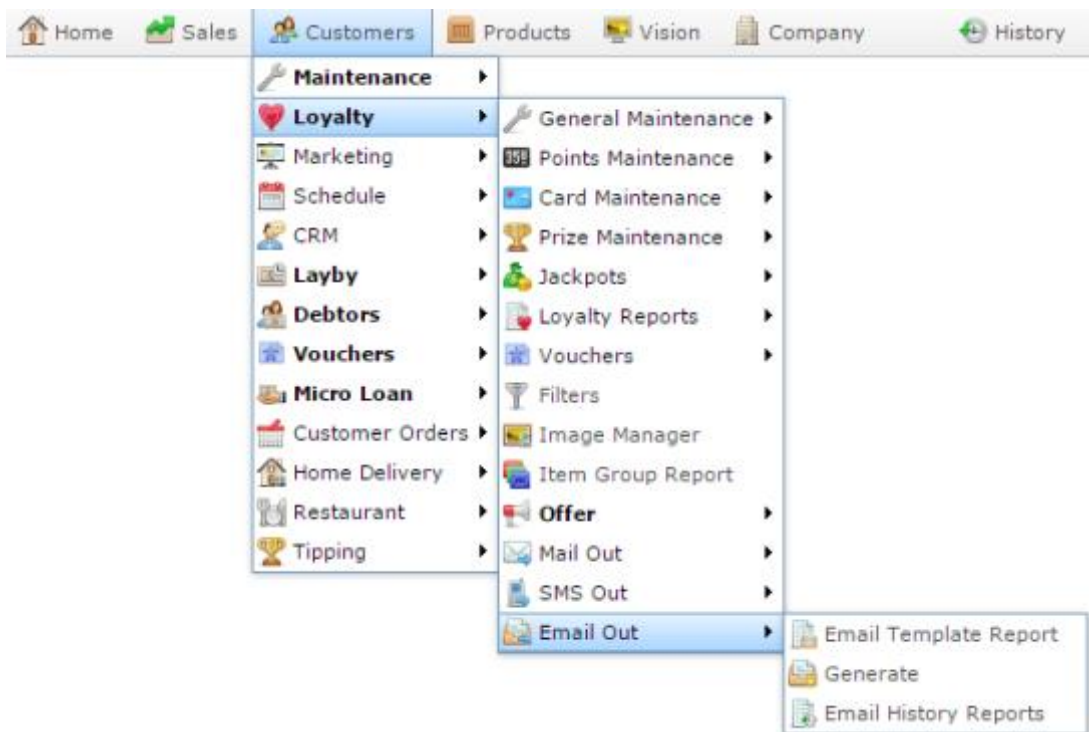
- *Creating a new email mail out* on page 360.
- *Creating a new printed mail out* on page 366.
- *Creating a new SMS mail out* on page 372.
- *Editing email mail outs* on page 362.
- *Editing SMS mail outs* on page 375.
- *Sending email mail outs* on page 364.
- *Sending printed mail outs* on page 368.
- *Printing address labels* on page 370.
- *Sending SMS mail outs* on page 377.

Creating a new email mail out

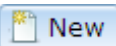
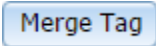
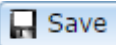
Create a new email mail out to send to loyalty members.

To create a new email mail out:

1. Press  Customers.
2. Press **Loyalty > Email Out > Email Template Report.**



The Email Detail Maintenance screen is displayed.

3. Press  **New**.
4. Type a description or name for the email mail out in the **Description** field.
5. Type the email subject in the **Subject** field.
6. Type the name the email should appear from in the **From Name** field.
7. Type the email address the email should be sent from in the **Return Email** field.
8. Type the email mail out message in the body field.
9. If you want to personalise the email mail out to each recipient, press  **Merge Tag** to select a merge tag to add in the current cursor position.
10. Press .

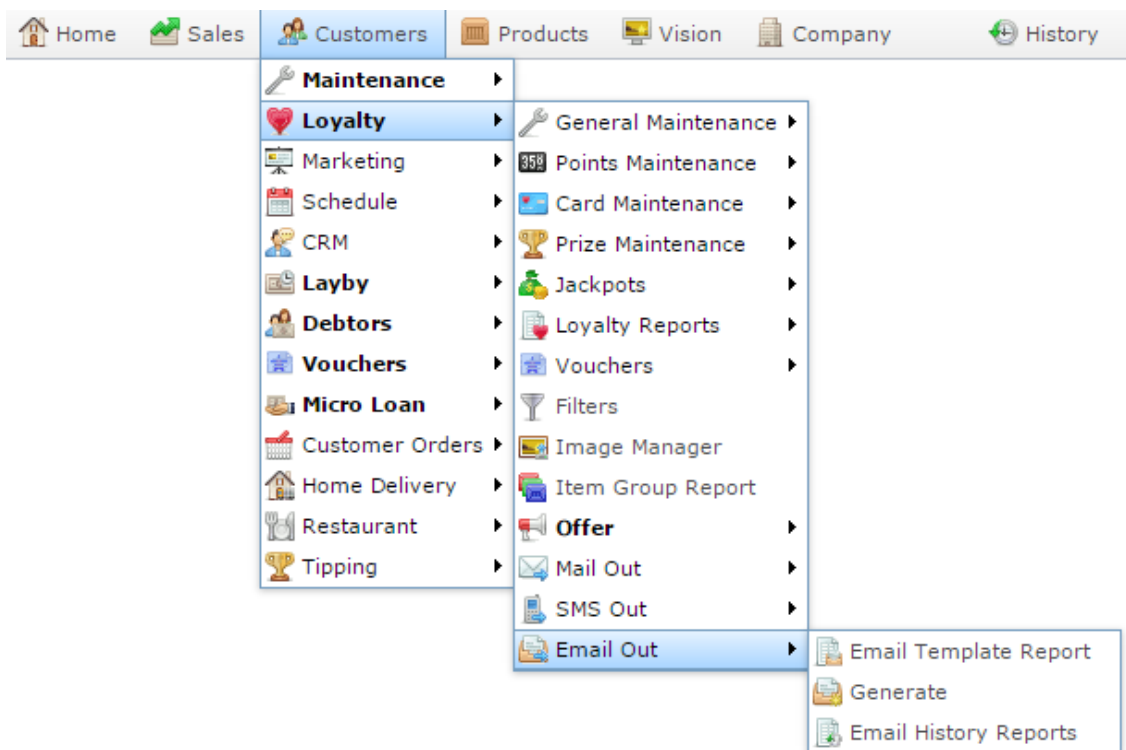
The email mail out is saved.

Editing email mail outs

Edit an email mail out to change the email you send to your loyalty members.

To edit an email mail out:

1. Press  **Customers**.
2. Press **Loyalty > Email Out > Email Template Report**.



The Email Templates report is displayed.

Email Templates Report

Description	Reference	Subject	Size (K)	Changed	Created
Welcome	66	Welcome to our loyalty program	1	08 DEC 2015	08 DEC 2015

Type
Emails

Date From
27/10/2015

Date To
8/12/2015

Add to Favourites Create New Email

3. Press the **Description** of the email message you want to send.
A popup menu is displayed.

Email Templates Report

Description	Reference	Subject	Size (K)	Changed	Created
Test 5	68	Test 5	1	25 JAN 2016	25 JAN 2016
Test 4	7	Test 4	1	25 JAN 2016	19 JAN 2016
Test 3	64	Test Manual with all options	7	18 JAN 2016	03 OCT 2015

Type

Emails

Date From

7/01/2016

Date To

18/02/2016

Add to Favourites

Create

4. Select **Edit**.

The Email Detail Maintenance screen is displayed.

Email Detail Maintenance Example company

Description:

Subject:

From Name:

Return Email:

Edit View Insert Table Format Tools

<<VIEW>>

Place your Text or images here

<<OPTOUT>>

This email was sent to <<EMAIL>> because you are a member. You can <<OPTOUT>> at any time.

<<TRACKING>>

table Words: 26

5. Edit the email as required.

See *Email Templates report* on page 388.

6. Press .

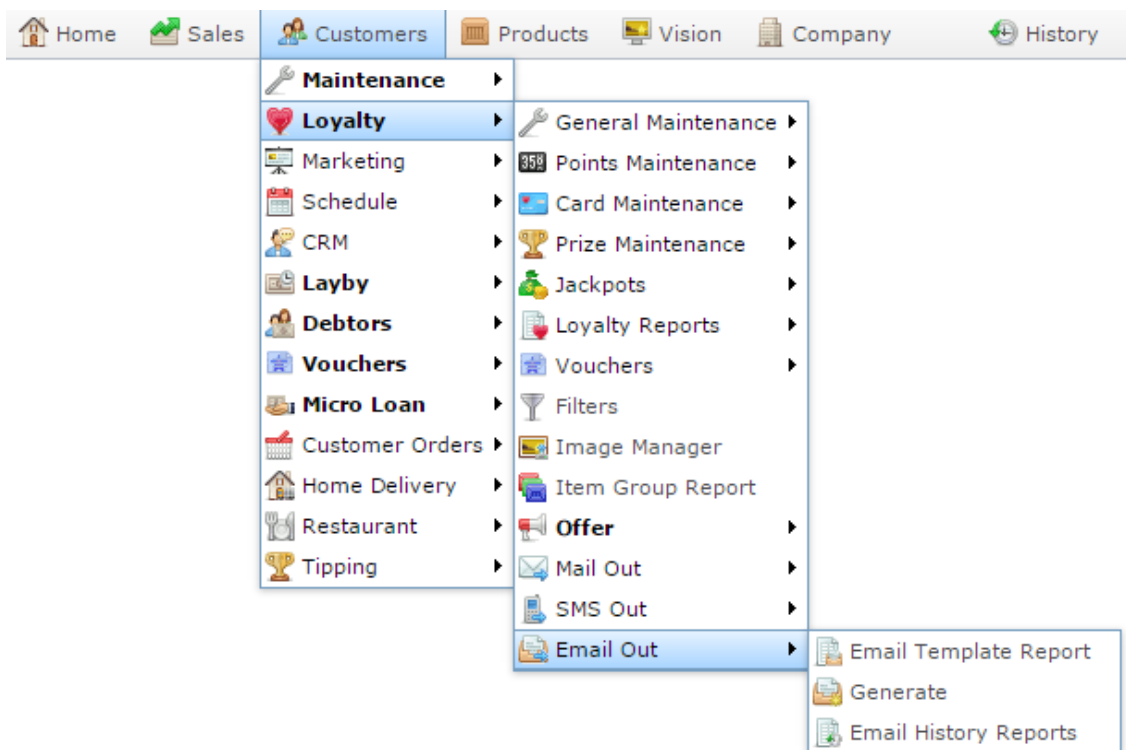
The email is saved.

Sending email mail outs

Send email mail outs to communicate with your loyalty members via email.

To send an email mail out:

1. Press  Customers.
2. Press **Loyalty > Email Out > Email Template Report.**



The Email Templates report is displayed.

Email Templates Report

Description	Reference	Subject	Size (K)	Changed	Created
Welcome	66	Welcome to our loyalty program	1	08 DEC 2015	08 DEC 2015

Type
Emails

Date From
27/10/2015

Date To
8/12/2015

Add to Favourites Create New Email

3. Press the **Description** of the email message you want to send.
A popup menu is displayed.

Email Templates Report

Description	Reference	Subject	Size (K)	Changed	Created
Test 5	68	Test 5	1	25 JAN 2016	25 JAN 2016
Test 4	7	Test 4	1	25 JAN 2016	19 JAN 2016
Test 3	64	Test Manual with all options	7	18 JAN 2016	03 OCT 2015

Type

Emails

Date From

7/01/2016

Date To

18/02/2016

Add to Favourites

Create

4. Select **Generate**.

The Email Report Options screen is displayed.




5. Select the options to filter your list of recipients.

See *Email Report Options* screen on page 379.

6. Press **Calculate**.

The Loyalty Email Generation report is displayed.

7. Press either:

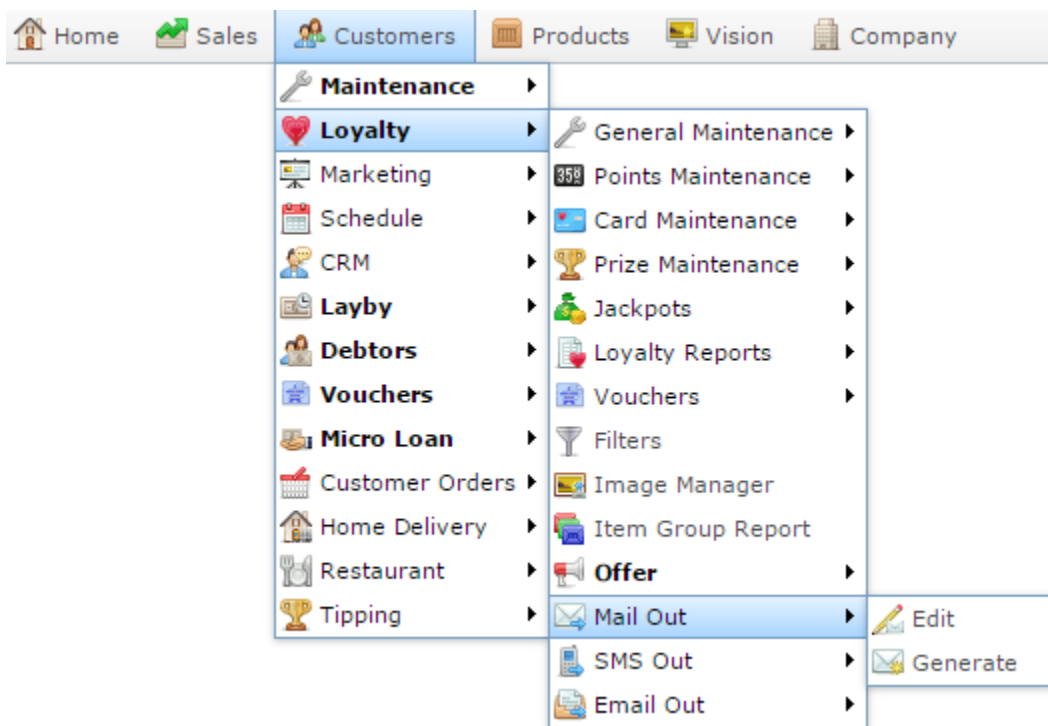
-  to send all the emails now.
-  to send the emails in scheduled batches.
-  to export the emails to Mailchimp for sending, if Mailchimp is configured for your company.

Creating a new printed mail out

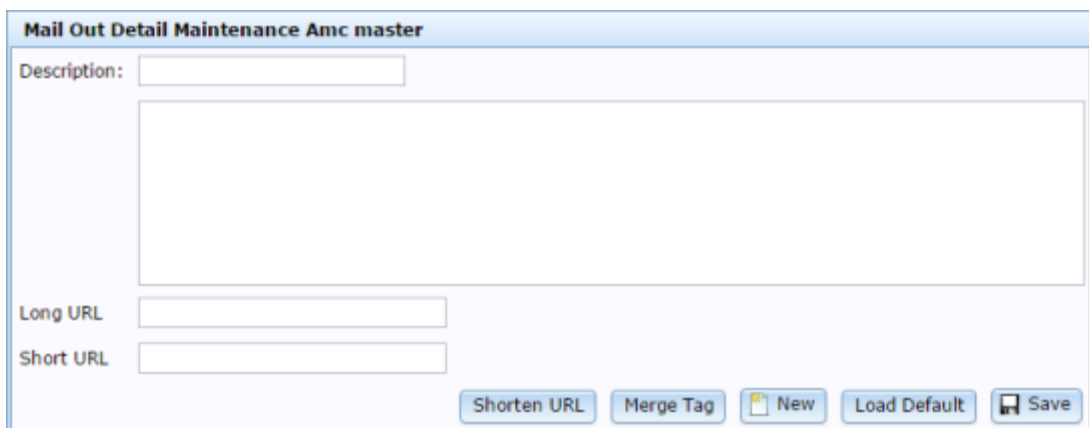
Create a new printed mail out to send to loyalty members.


To create a new printed mail out:

1. Press  Customers.
2. Press **Loyalty > Mail Out > Edit**.

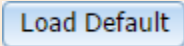


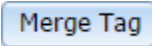
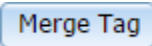
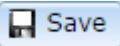
The Mail Out Detail Maintenance screen is displayed.

A screenshot of the 'Mail Out Detail Maintenance Amc master' form. The form has a title bar and a main content area. The 'Description' field is a large text area. Below it are 'Long URL' and 'Short URL' fields. At the bottom, there are five buttons: 'Shorten URL', 'Merge Tag', 'New', 'Load Default', and 'Save'.

3. Press  New.
4. Type a description or name for the mail out in the **Description** field.

5. Type the mail out message in the body field.

Tip: If you have a standard mail out that you want to edit, press  to load it.

6. If you want to personalise the mail out to each recipient, press  to select a merge tag to add in the current cursor position.
7. If you want to shorten a URL:
 1. Type it into the **Long URL** field, and press .
 2. Copy the **Short URL** to the mail out message.
8. Press .

The mail out is saved.

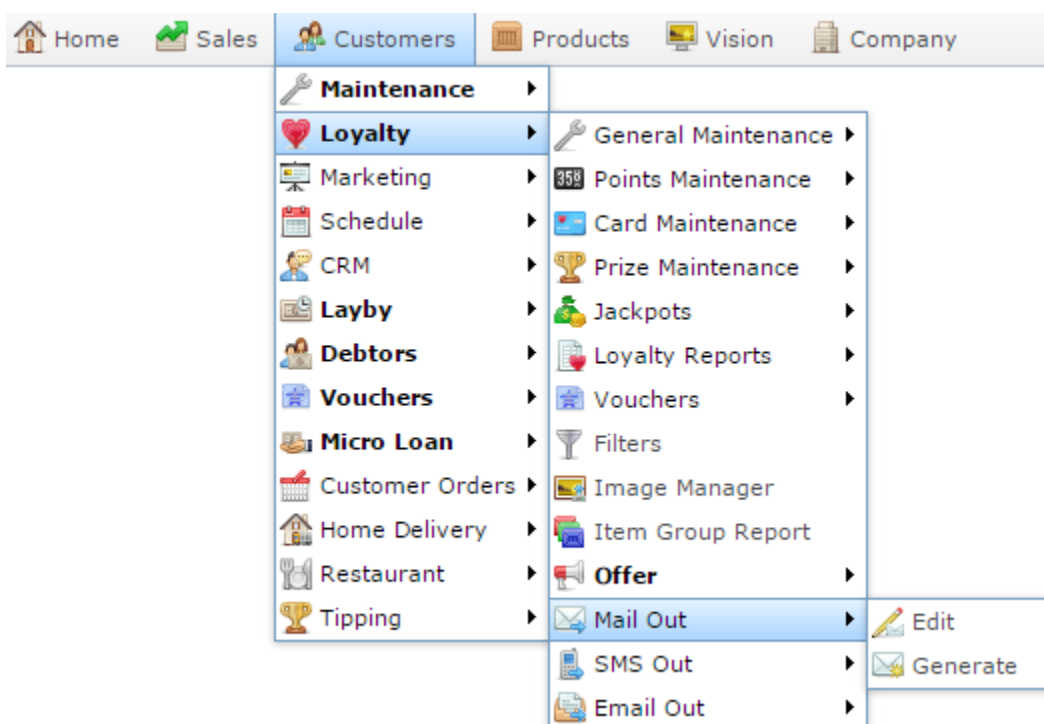
Sending printed mail outs

Send printed mail outs to mail printed marketing material to your loyalty members.

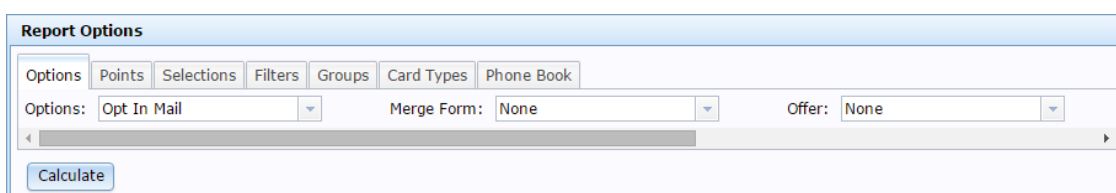
Note: You can print address labels at the same time. See *Printing address labels* on page 370.

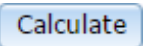
To send a mail out:

1. Press  Customers .
2. Press **Loyalty > Mail Out > Generate** .






The Mail Out Report Options screen is displayed.



3. Select the options to filter the list of people you want to mail to.
See *Mail Out Report Options* screen on page 393.
4. Press  .

The Loyalty Mail Generation report is displayed.

Loyalty Mail Generation Report

Loyalty Mail Generation Report				
Selection	Customers	Points	Value	Action
Card Data	429	179,394.7	\$7,175.79	  
Total	429	179,394.7	\$7,175.79	

Click On Icon to activate

Parameters	
Element	Selection
Home Site	All
Options	Opt In Mail
Offer	None

5. Press .

Tip: Press  to display the address labels for the same selection of customers.

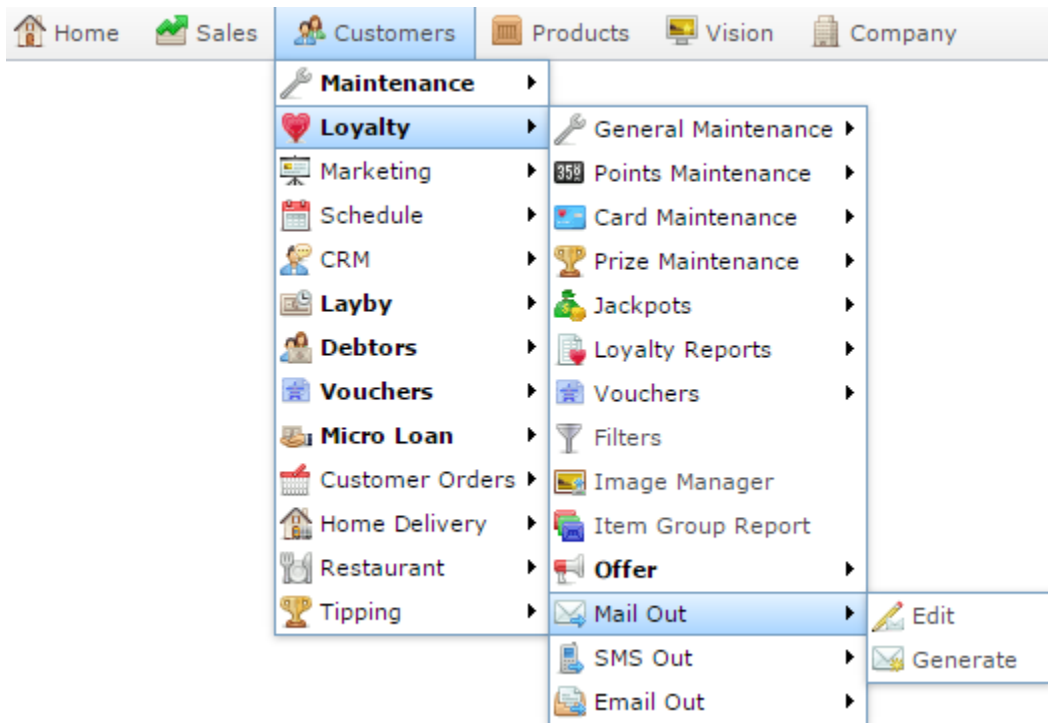
The printed mail outs are displayed as PDFs to be printed.

Printing address labels

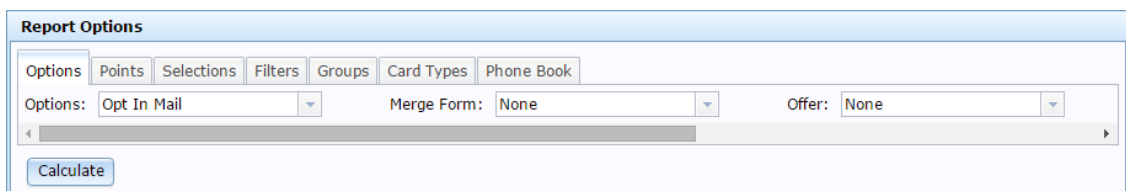
Print the address labels for envelopes to send marketing material through the post.

To print address labels:

1. Press  **Customers**.
2. Press **Loyalty > Mail Out > Generate**.



The Mail Out Report Options screen is displayed.






3. Select the options to filter the list of people you want to mail to.

See *Mail Out Report Options* screen on page 393.

4. Press .

The Loyalty Mail Generation report is displayed.

Loyalty Mail Generation Report

Loyalty Mail Generation Report				
Selection	Customers	Points	Value	Action
Card Data	429	179,394.7	\$7,175.79	  
Total	429	179,394.7	\$7,175.79	

Click On Icon to activate

Parameters	
Element	Selection
Home Site	All
Options	Opt In Mail
Offer	None


5. Press .

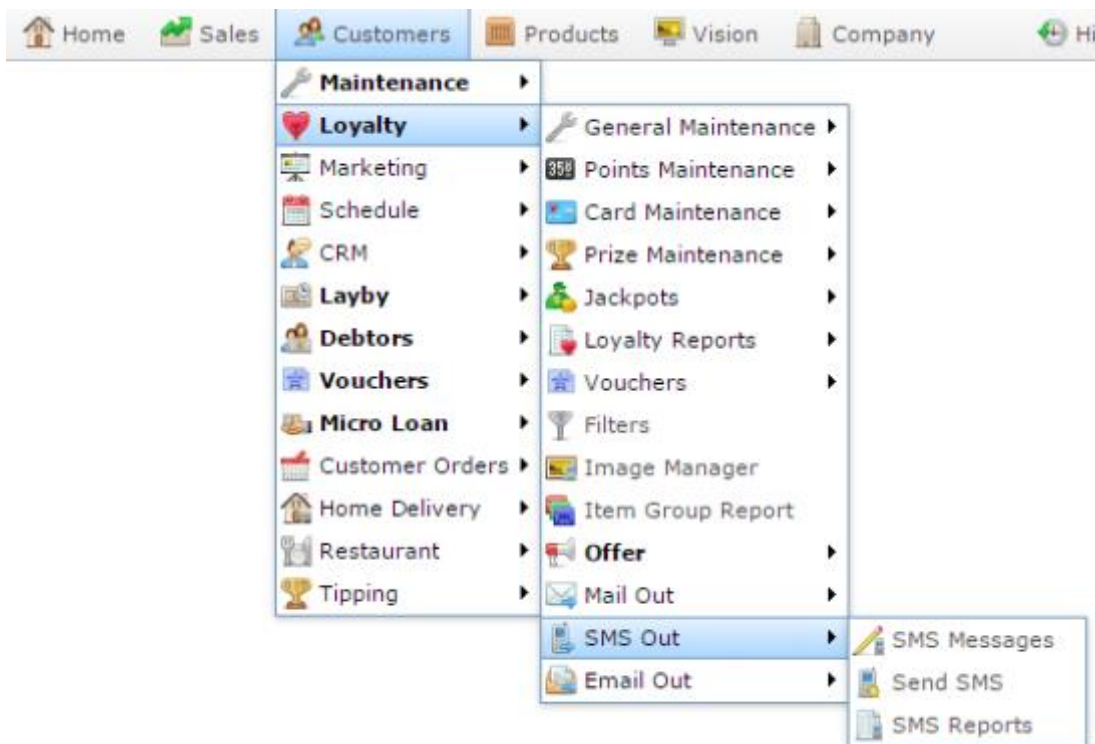
The address labels are displayed as PDFs to be printed.

Creating a new SMS mail out

Create an SMS mail out to send an SMS message to loyalty members.

To create an SMS mail out:

1. Press  Customers.
2. Press **Loyalty > SMS Out > SMS Messages**.

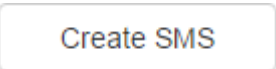


The SMS List report is displayed.

SMS List

Description	Reference	Changed	Created	Message	Portal User
Welcome	65	08 DEC 2015	08 DEC 2015	Welcome to our loyalty program, <<FISRT>> <<LAST>>! &it:&it.STOP>>	bob

Date From: 24/11/2015
 Date To: 8/12/2015
 Add to Favourites Create SMS

3. Press .

The SMS Detail Maintenance screen is displayed.

4. Type a name or description in the **Description** field.
5. Type the message in the body field.

6. Select the sender of the SMS messages.

7. Select the maximum number of SMS blocks to be used in the message.

SMS Detail Maintenance Amc master

Description:

SMS Opt Out Message -> Reply STOP to 0447100204 to opt out

Sender ID: Zen Global

Maximum 1 Block(s)

121 Character Left

Long URL

Short URL

8. If you want to shorten a URL:

1. Type it into the **Long URL** field, and press .
2. Copy the **Short URL** to the mail out message.


9. Press .

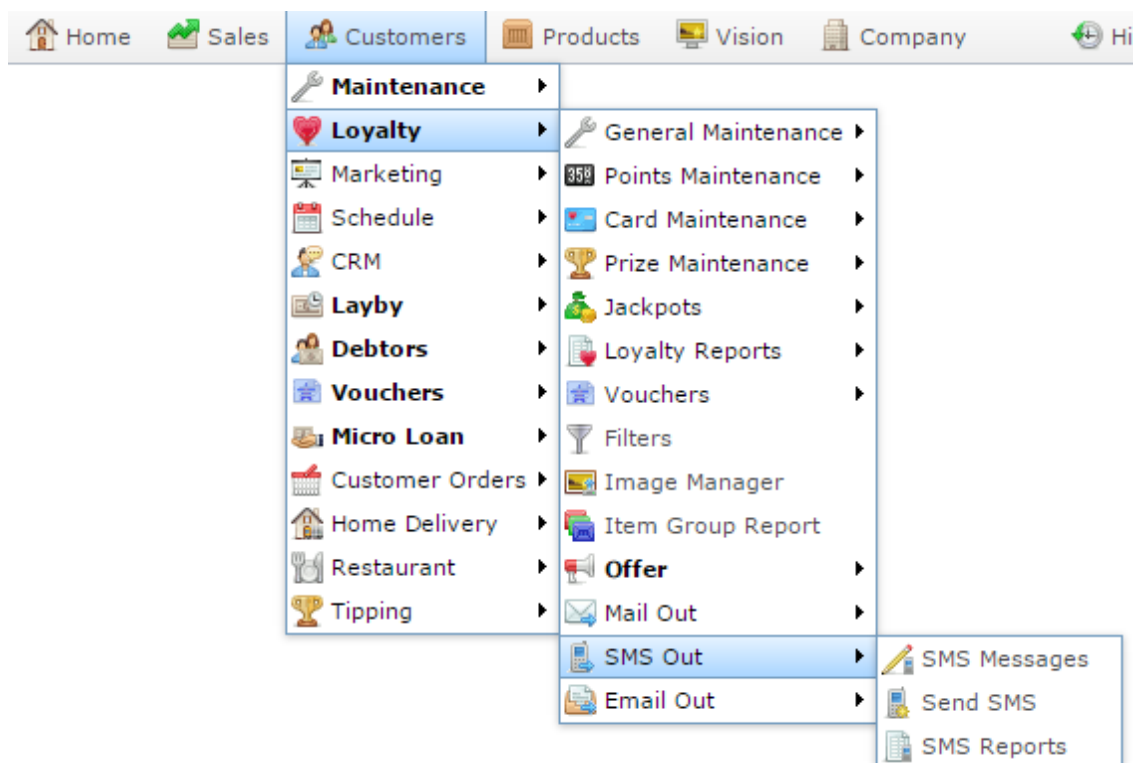
The SMS message is saved.

Editing SMS mail outs

Edit an SMS mail out to change the message sent to loyalty members.

To edit an SMS mail out:

1. Press  Customers.
2. Press **Loyalty > SMS Out > SMS Messages**.



The SMS List report is displayed.

SMS List

Description	Reference	Changed	Created	Message	Portal User
Welcome	65	08 DEC 2015	08 DEC 2015	Welcome to our loyalty program, <<FISRT>> <<LAST>>! ⁢⁢STOP>>	bob

Date From

24/11/2015

Date To

8/12/2015

Add to Favourites

Create SMS

3. Press the **Description** of the SMS message you want to send.

A popup menu is displayed.

Managing mail outs

SMS List

Description	Reference	Changed	Created	Message	Portal User
Email	57	27 JUN 2015	26 JUN 2015	Reply STOP to <url>	Bob
Ref				<<STOP>> to opt out	
sk.jsdfhksdghk	49	07 APR 2014	07 APR 2014	Reply STOP to <url>	
				<<STOP>> to opt out	

Date From

Date To

4. Select **Edit SMS**.

The SMS Report Options screen is displayed.

SMS Detail Maintenance Amc master

Description:

Reply STOP to 0447100204 to opt out

SMS Opt Out Message -> Reply STOP to 0447100204 to opt out

Sender ID: Zen Global

Maximum 1 Block(s)

121 Character Left

Long URL

Short URL

5. Edit the message.

See *SMS Report Options screen* on page 413.


6. Press .

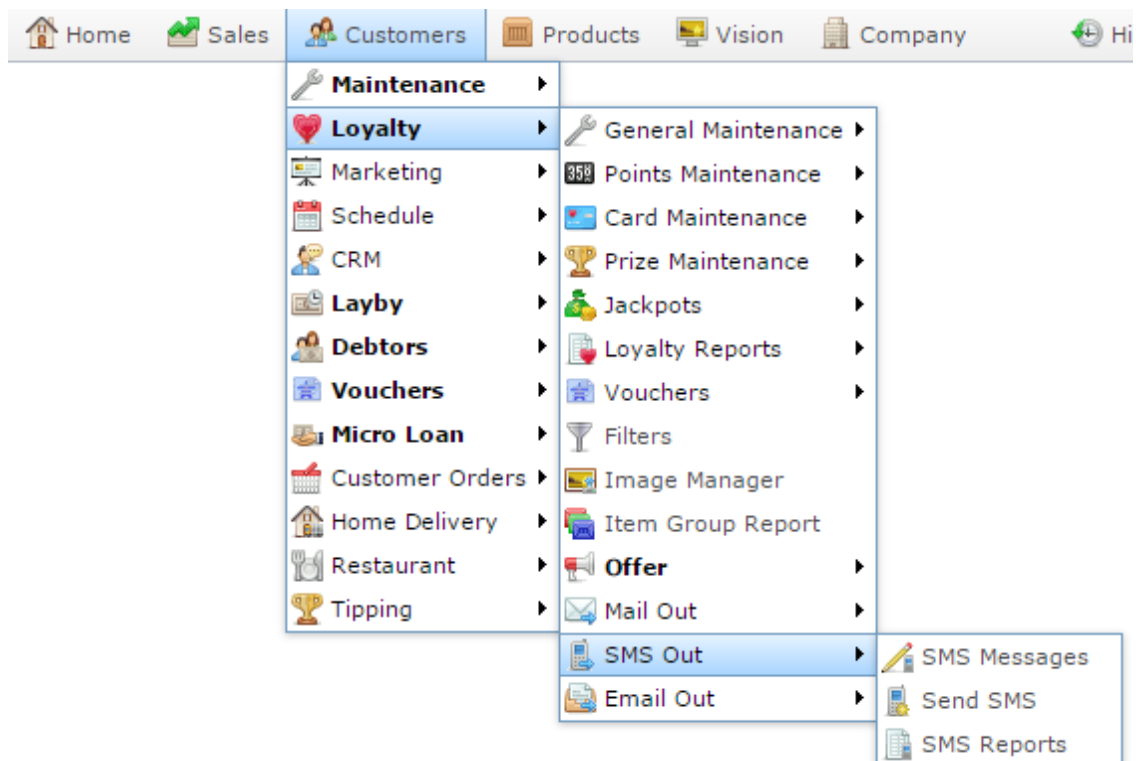
The SMS message is saved.

Sending SMS mail outs

Send SMS mail outs to communicate with your loyalty members via SMS.

To send an SMS mail out:

1. Press  Customers.
2. Press **Loyalty > SMS Out > SMS Messages**.



The SMS List report is displayed.

SMS List

Description	Reference	Changed	Created	Message	Portal User
Welcome	65	08 DEC 2015	08 DEC 2015	Welcome to our loyalty program, <<FISRT>> <<LAST>>! ⁢⁢STOP>>	bob

Date From: 24/11/2015

Date To: 8/12/2015

Add to Favourites Create SMS

3. Press the **Description** of the SMS message you want to send.

A popup menu is displayed.

SMS List

Description	Reference	Changed	Created	Message	Portal User
Email	57	27 JUN 2015	26 JUN 2015	Reply STOP to	Bob
Ref				<<STOP>> to opt out	
sk.jsdhfksdghk	49	07 APR 2014	07 APR 2014	Reply STOP	
				to opt out	

Date From

Date To

4. Select **Send SMS**.

The SMS Report Options screen is displayed.

Report Options

Options:

Options: Merge Form: Offer:




5. Select the options to filter your list of recipients.

See *SMS Report Options screen* on page 413.

6. Press .

The Loyalty SMS Generation report is displayed.



Loyalty SMS Generation Report

Loyalty SMS Generation Report				
Selection	Customers	Points	Value	Action
Card Data	155	181,889.5	\$7,275.58	  
Total	155	181,889.5	\$7,275.58	

Click On Icon to activate

Parameters	
Element	Selection
Home Site	All
Options	Opt In SMS
Offer	None
Job	152

7. Press either:

-  to send all the emails now.
-  to send the emails in scheduled batches.

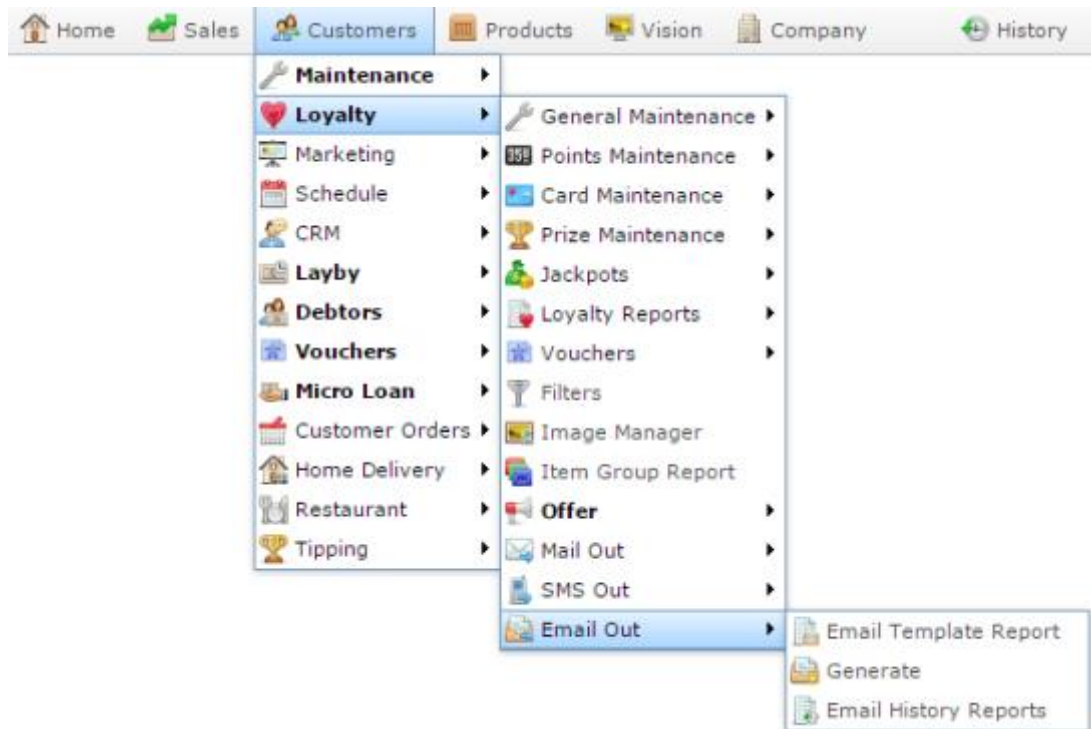
Email Report Options screen

Select the parameters to generate your email list.

Opening the Email Report Options screen

To open the Email Report Options screen:

1. Press  Customers .
2. Press **Loyalty > Email Out > Generate** .



The Email Report Options screen is displayed.

Report Options

Options Points Selections Filters Groups Card Types Phone Book

Options: Merge Form: Offer:

Scheduler

Batch	Job	Home Site	Reference	Date	Create Date
50	124	All	[45] Birthday Email Cron	2025-05-02 03:00:00	2015-05-01 14:21:23

Email Report Options screen key fields and buttons

Options tab

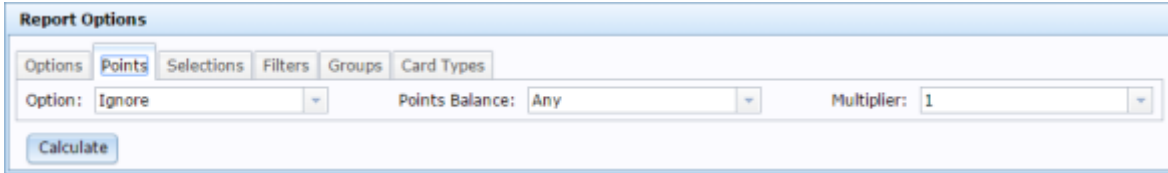
Select email filter options.

Batch	Job	Home Site	Reference	Date	Create Date
50	124	All	[45] Birthday Email Cron	2025-05-02 03:00:00	2015-05-01 14:21:23

Field	Description
Options	Select the type of marketing to report on: Opt in Email Loyalty members who have opted in to receive marketing material by email. Opted in Email Loyalty members who have responded to an email that asked permission to send them marketing material. Confirmed Email Loyalty members who have responded to an email that confirmed their email address was correct. All All loyalty members who have subscribed to marketing materials.
Merge Form	Add the email list from a previous email to the report.
Offer	Select an offer to add to the email.
Home Site	Select the site to report on.

Points tab

Select loyalty points filter options.



Report Options

Options Points Selections Filters Groups Card Types

Option: Ignore Points Balance: Any Multiplier: 1

Calculate

Field	Description
Option	Select to filter based on whether loyalty points are greater or less than the Points Balance , or Ignore to ignore this option.
Points Balance	Select the loyalty points balance to compare with.
Multiplier	Multiply the points balance to compare. For example, to look for customers with a balance of 500,000 points, select 500 in the Points Balance , and 100 in the Multiplier .

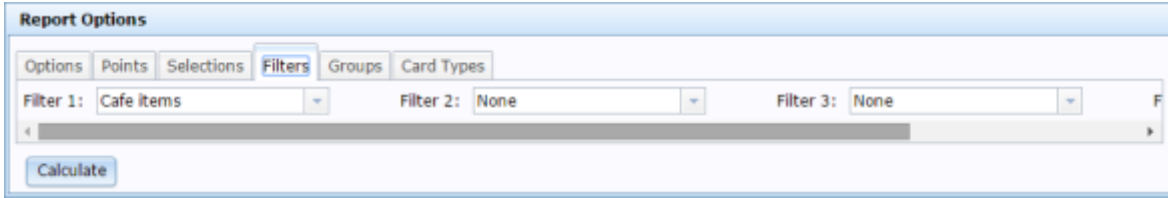
Selections tab

Select general filter options.

Field	Description
Expired Cards	Select to filter the report to cards that are expired, are not expired, or Ignore to include both expired and not expired cards.
Birth Month	Select the loyalty member's birth month to filter on or None to ignore the birth month.
Age Range	Select the age bracket or specific age to report on or None to not filter on age.
Gender	Select the gender to report on, or Both to ignore gender when filtering.
Names	Select to filter the report by: <ul style="list-style-type: none"> ▪ State ▪ Post code ▪ Names that start with a chosen letter.

Filters tab

Select filter group filter options.



Field	Description
Filter 1	Select a filter to apply.
Filter 2	Select an additional filter to apply: loyalty members must pass all filters to be included.
Filter 3	Select an additional filter to apply: loyalty members must pass all filters to be included.
Filter 4	Select an additional filter to apply: loyalty members must pass all filters to be included.

Groups tab

Select loyalty group filter options.

The screenshot shows a software interface titled "Report Options" with several tabs: "Options", "Points", "Selections", "Filters", "Groups" (which is selected), and "Card Types". Below the tabs, there are three dropdown menus: "Option:" with "In All Groups" selected, "Group 1:" with "None" selected, and "Group 2:" with "None" selected. A "Calculate" button is located at the bottom left of the dialog box.

Field	Description
Option	Select whether to: <ul style="list-style-type: none"> ▪ Include the members who are in all the selected groups. ▪ Include the members who are in any of the selected groups. ▪ Include the members who are not in any of the selected groups.
Group 1	Select a loyalty group to filter on.
Group 2	Select a loyalty group to filter on.
Group 3	Select a loyalty group to filter on.
Group 4	Select a loyalty group to filter on.

Card Types tab

Select card type filter options.

The screenshot shows a software interface titled "Report Options" with a "Card Types" tab selected. The interface includes several dropdown menus: "Option:" set to "In Any Card Types", "Card Type 1:" set to "None", and "Card Type 2:" set to "None". A "Calculate" button is located at the bottom left of the dialog box.

Field	Description
Option	Select whether to include: <ul style="list-style-type: none">▪ Loyalty members whose card is one of the selected types.▪ Loyalty members whose card is not any of the selected types.
Card Type 1	Select a card type to filter on.
Card Type 2	Select a card type to filter on.
Card Type 3	Select a card type to filter on.
Card Type 4	Select a card type to filter on.

Phone Book tab

Select loyalty group filter options.

The screenshot shows a software interface titled "Report Options" with a "Phone Book" tab selected. Under the "Include" section, there are three dropdown menus labeled "Phone Book 1:", "Phone Book 2:", and "Phone Book 3:". Each dropdown menu currently displays the word "None". Below these menus is a horizontal scrollbar. At the bottom left of the dialog, there is a "Calculate" button.

Field	Description
Phone Book 1	Select a phone book to include.
Phone Book 2	Select a phone book to include.
Phone Book 3	Select a phone book to include.
Phone Book 4	Select a phone book to include.

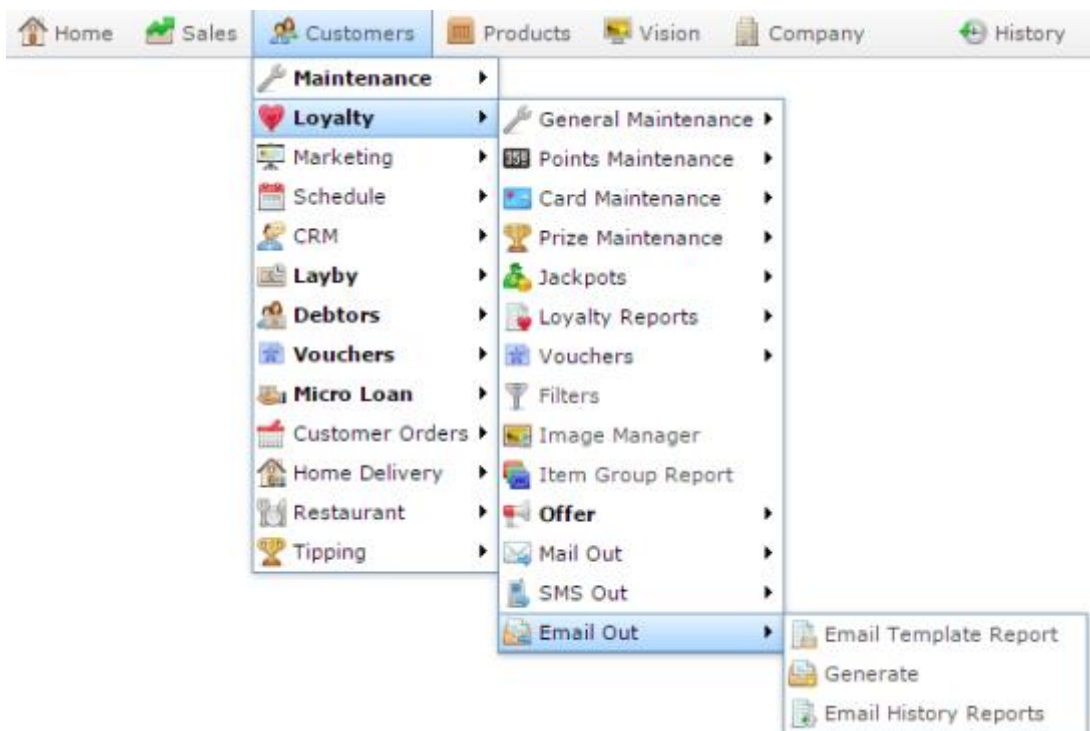
Email Templates report

Use the Email Templates report to view emails that have been sent to loyalty customers, and view email templates.

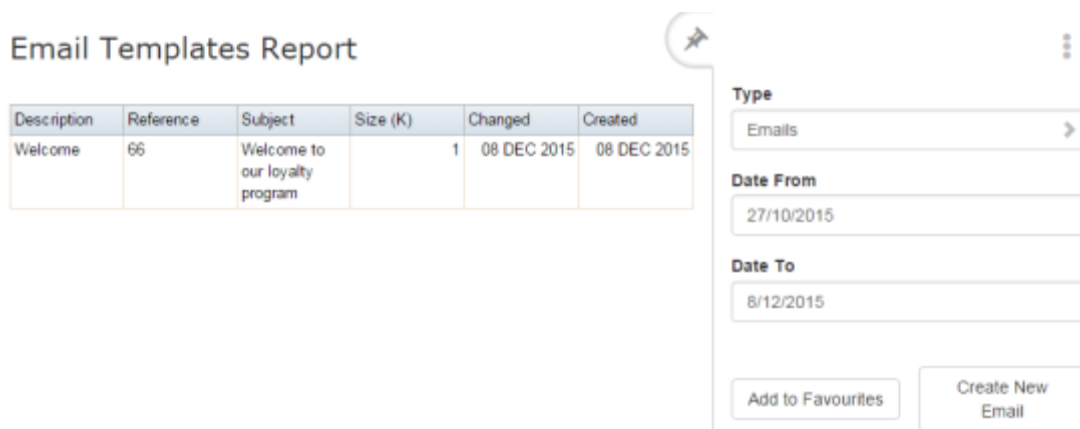
Opening the Email Templates report

To open the Email Templates report screen:

1. Press  Customers .
2. Press **Loyalty > Email Out > Email Template Report.**



The Email Templates report is displayed.



Email Templates report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
Type	Select to report on Emails or Email Templates.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the email or SMS mail out.
Reference	Unique identifier for the email or SMS mail out.
Subject	Subject line of the email.
Size (K)	Size of the email in kilobytes.
Changed	Date the email or SMS mail out was last edited.
Created	Date the email or SMS mail out was created.

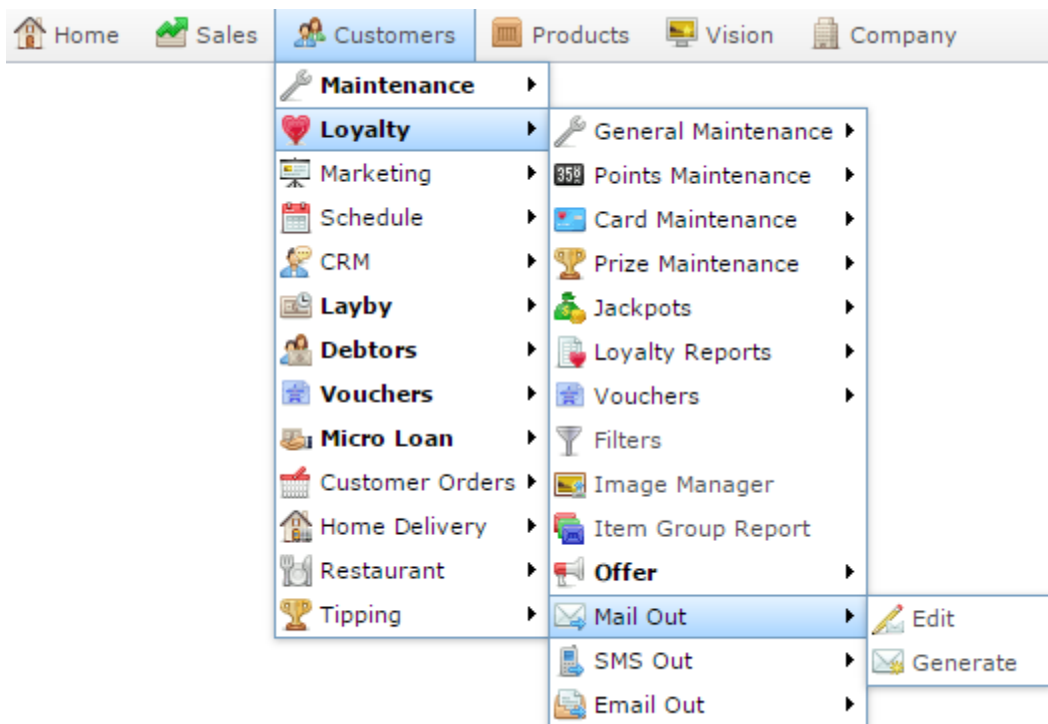
Mail Out Detail Maintenance screen

Use this screen to create and maintain printed mail outs.

Opening the Mail Out Detail Maintenance screen

To open the Mail Out Detail Maintenance screen:

1. Press  Customers.
2. Press **Loyalty > Mail Out > Edit**.



The Mail Out Detail Maintenance screen is displayed.

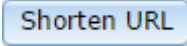
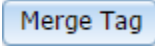
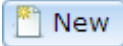
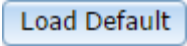
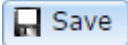
Mail Out Detail Maintenance Amc master

Description:

Long URL

Short URL

Mail Out Detail Maintenance screen key fields and buttons

Field	Description
Description	Describe the mail out.
Body	Create the template of the mail out to send.
Long URL	Copy a long URL into this field to shorten it.
Short URL	Shortened URL you can copy into the body.
 Shorten URL	Press to convert a long URL into a short URL.
 Merge Tag	Press to use a merge tag to personalise the mail out.
 New	Press to create a new mail out template.
 Load Default	Press to load the default mail out template for editing.
 Save	Press to save changes to the mail out template.

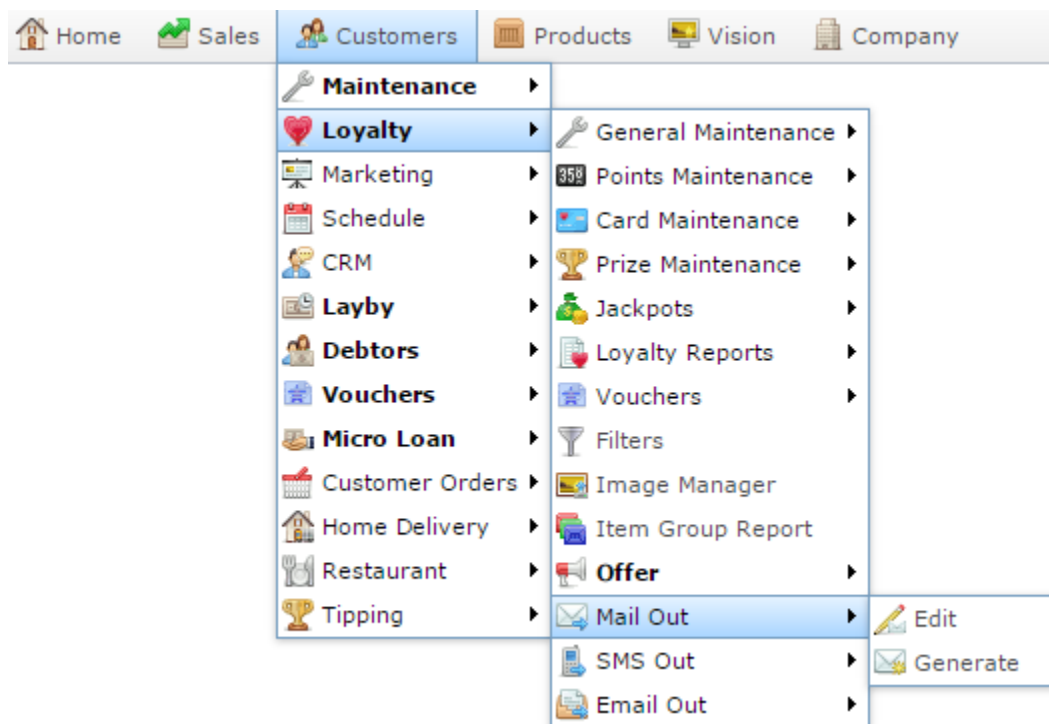
Mail Out Report Options screen

Use this screen to generate mail outs for specific customers, merging in personal information and offers, and printing address labels.

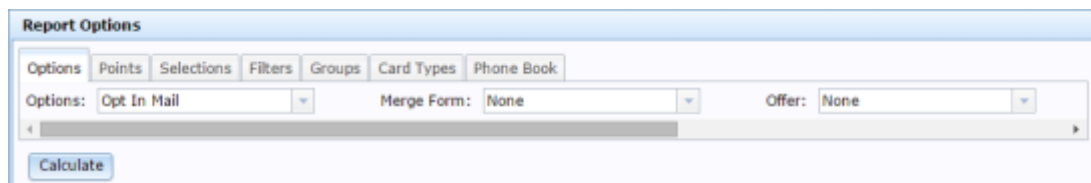
Opening the Mail Out Report Options screen

To open the Mail Out Report Options screen:

1. Press  Customers.
2. Press **Loyalty > Mail Out > Generate**.



The Mail Out Report Options screen is displayed.



Mail Out Report Options screen key fields and buttons

Options tab

Select email filter options.

The screenshot shows a software interface titled "Report Options". At the top, there are several tabs: "Options", "Points", "Selections", "Filters", "Groups", "Card Types", and "Phone Book". The "Options" tab is currently selected. Below the tabs, there are three dropdown menus: "Options:" with "Opt In Mail" selected, "Merge Form:" with "None" selected, and "Offer:" with "None" selected. A "Calculate" button is located at the bottom left of the interface.

Field	Description
Options	Select the type of marketing to report on: Opt in Mail Loyalty members who have opted in to receive marketing material by mail. All All loyalty members who have subscribed to marketing materials.
Merge Form	Add the email list from a previous email to the report.
Offer	Select the offer to add.
Home Site	Select the site to report on.

Points tab

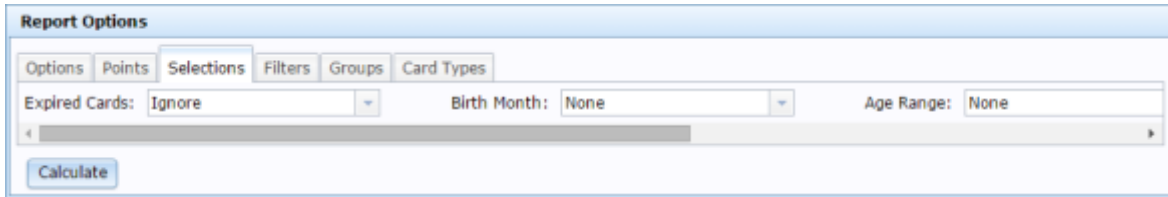
Select loyalty points filter options.

The screenshot shows a 'Report Options' dialog box with the 'Points' tab selected. It contains three dropdown menus: 'Option' (set to 'Ignore'), 'Points Balance' (set to 'Any'), and 'Multiplier' (set to '1'). A 'Calculate' button is located at the bottom left of the dialog.

Field	Description
Option	Select to filter based on whether loyalty points are greater or less than the Points Balance , or Ignore to ignore this option.
Points Balance	Select the loyalty points balance to compare with.
Multiplier	Multiply the points balance to compare. For example, to look for customers with a balance of 500,000 points, select 500 in the Points Balance , and 100 in the Multiplier .

Selections tab

Select general filter options.



Field	Description
Expired Cards	Select to filter the report to cards that are expired, are not expired, or Ignore to include both expired and not expired cards.
Birth Month	Select the loyalty member's birth month to filter on or None to ignore the birth month.
Age Range	Select the age bracket or specific age to report on or None to not filter on age.
Gender	Select the gender to report on, or Both to ignore gender when filtering.
Names	Select to filter the report by: <ul style="list-style-type: none">▪ State▪ Post code▪ Names that start with a chosen letter.

Filters tab

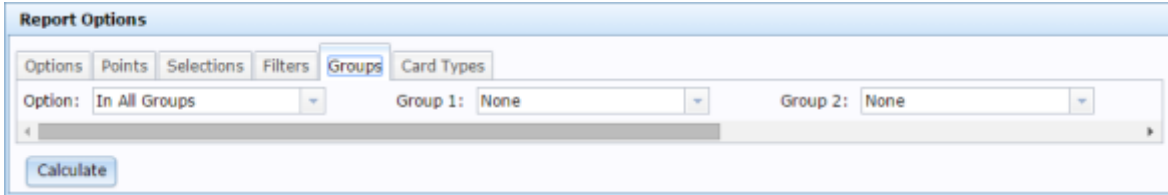
Select filter group filter options.

The screenshot shows a software interface titled "Report Options" with a "Filters" tab selected. Below the tabs are three filter selection fields: "Filter 1: Cafe Items", "Filter 2: None", and "Filter 3: None". A "Calculate" button is located at the bottom left of the dialog box.

Field	Description
Filter 1	Select a filter to apply.
Filter 2	Select an additional filter to apply: loyalty members must pass all filters to be included.
Filter 3	Select an additional filter to apply: loyalty members must pass all filters to be included.
Filter 4	Select an additional filter to apply: loyalty members must pass all filters to be included.

Groups tab

Select loyalty group filter options.



Field	Description
Option	Select whether to: <ul style="list-style-type: none">▪ Include the members who are in all the selected groups.▪ Include the members who are in any of the selected groups.▪ Include the members who are not in any of the selected groups.
Group 1	Select a loyalty group to filter on.
Group 2	Select a loyalty group to filter on.
Group 3	Select a loyalty group to filter on.
Group 4	Select a loyalty group to filter on.

Card Types tab

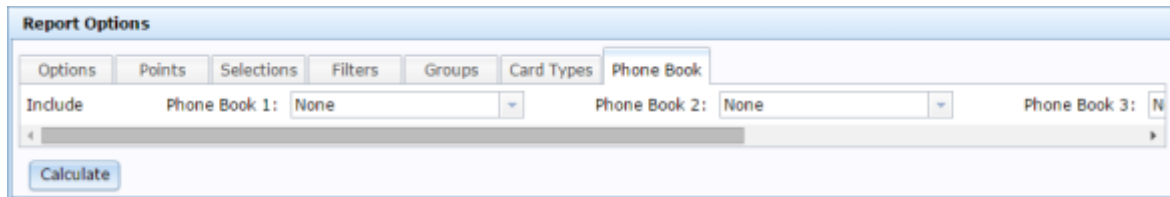
Select card type filter options.

The screenshot shows a software interface titled "Report Options" with a "Card Types" tab selected. It contains three dropdown menus: "Option:" (set to "In Any Card Types"), "Card Type 1:" (set to "None"), and "Card Type 2:" (set to "None"). A "Calculate" button is located at the bottom left of the dialog box.

Field	Description
Option	Select whether to include: <ul style="list-style-type: none"> ▪ Loyalty members whose card is one of the selected types. ▪ Loyalty members whose card is not any of the selected types.
Card Type 1	Select a card type to filter on.
Card Type 2	Select a card type to filter on.
Card Type 3	Select a card type to filter on.
Card Type 4	Select a card type to filter on.

Phone Book tab

Select loyalty group filter options.



The screenshot shows a software interface titled "Report Options" with a "Phone Book" tab selected. Under the "Include" section, there are three dropdown menus labeled "Phone Book 1:", "Phone Book 2:", and "Phone Book 3:". Each dropdown menu currently displays the word "None". A "Calculate" button is located at the bottom left of the dialog box.

Field	Description
Phone Book 1	Select a phone book to include.
Phone Book 2	Select a phone book to include.
Phone Book 3	Select a phone book to include.
Phone Book 4	Select a phone book to include.

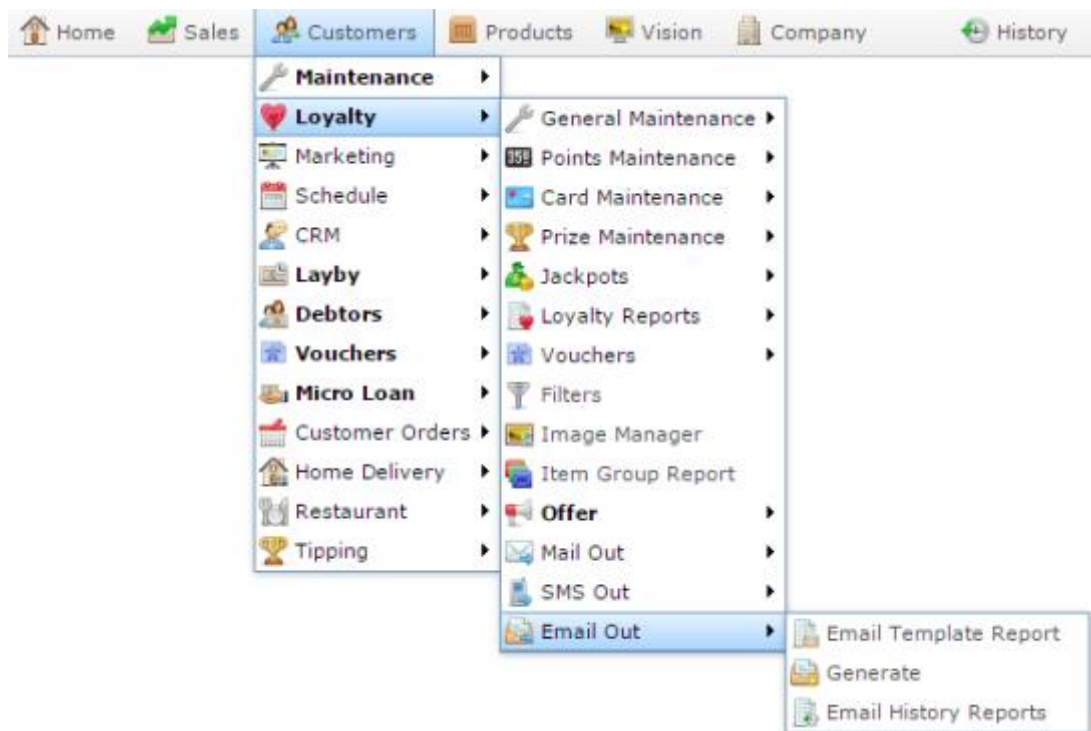
Sites Email report

Use the Sites Email report to view emails sent by site.

Opening the Sites Email report

To open the Sites Email report:

1. Press  Customers.
2. Press **Loyalty > Email Out > Email History Reports.**



The Sites Email report is displayed.

Sites Email Report -> Offer Default : Job All

Site	Job	Subject	Sent Ok	Count	Opened	Viewed	Opt Out	Opt In	Confirmed	Data (K)
Chadsto	118	Welcom To Your special Club		1	0	0	0	0	0	2
Total				1	0	0	0	0	0	2

States

VIC >

Site

Chadstone >

Date From

8/12/2000

Date To

8/12/2015

Offer

Default >

Job

All >

Add to Favourites

Sites Email report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
States	Select a state or county to filter the report by.
Offer	Select a specific customer offer to report on.

Field	Description
Job	<p>Select the type of communication record to display:</p> <ul style="list-style-type: none"> ▪ All. ▪ Loyalty Events. ▪ Lost Loyalty Password. ▪ User Messages. ▪ Alarms. ▪ Support Emails. ▪ Debtor Statements. ▪ Franchise Event. ▪ Franchise Fee. ▪ Purchase Order Submit. ▪ Purchase Order Response. ▪ Purchase Order Requisition. ▪ Scheduler. ▪ Lay Buy. ▪ Micro Loan.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site	Site the email or SMS originated from.
Job	Job that the email or SMS relates to. For example, a loyalty event.
Subject	Subject line of the email.
Sent OK	Indicates whether the email batch was sent successfully.
Count	Number of emails or SMSs sent in the batch.
Opened	Indicate whether this email was open. Note: Browser settings can prevent this action being detected.
Viewed	Indicates whether a customer clicked the View Here link to read the HTML version of the email.

Field	Description
Opt Out	Indicates whether the customer elected to opt-out of receiving further marketing material.
Opt In	Indicates whether the customer elected to receive further emails from this email.
Confirmation	The customer has clicked a link in an email that confirms their email address is correct.
Data (K)	Size of the individual email.

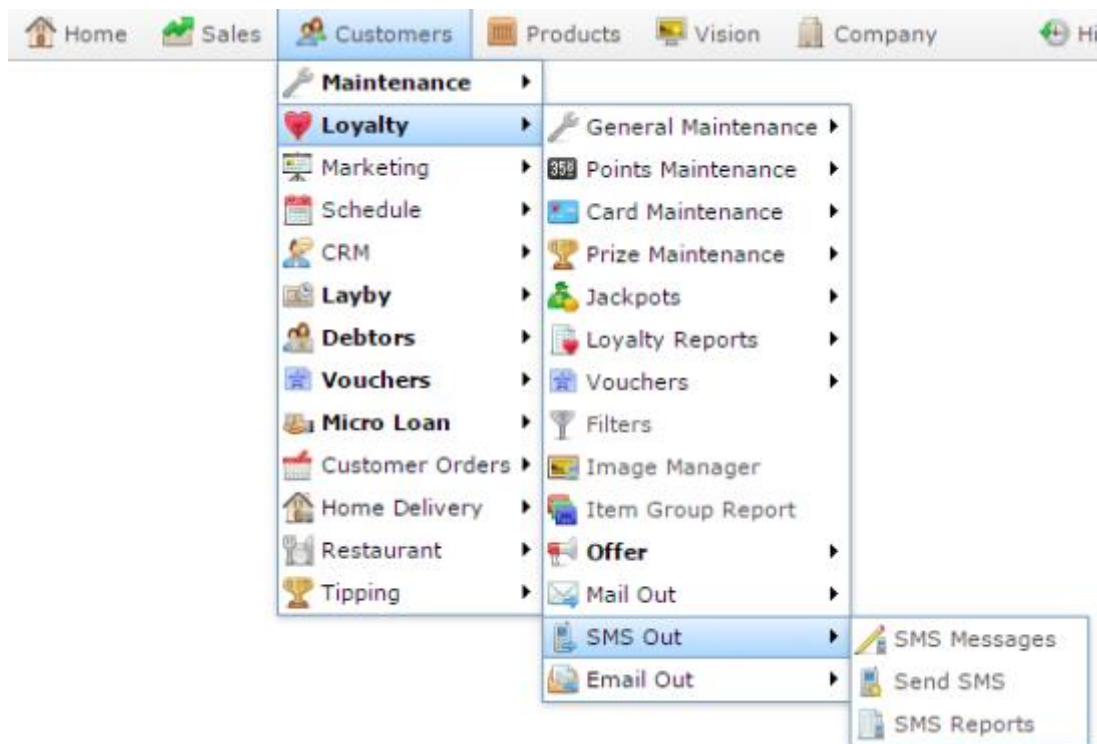
SMS List report

Use the SMS List report to view SMS messages that have been sent to loyalty customers.

Opening the SMS List report

To open the SMS List report:

1. Press  Customers.
2. Press **Loyalty > SMS Out > SMS Messages**.



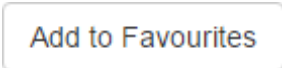

The SMS List report is displayed.



SMS List report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to create a new SMS to send.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the email or SMS mail out.
Reference	Unique identifier for the email or SMS mail out.
Changed	Date the email or SMS mail out was last edited.
Created	Date the email or SMS mail out was created.
Message	The message sent as the SMS.
Portal User	The portal user who sent the SMS messages.

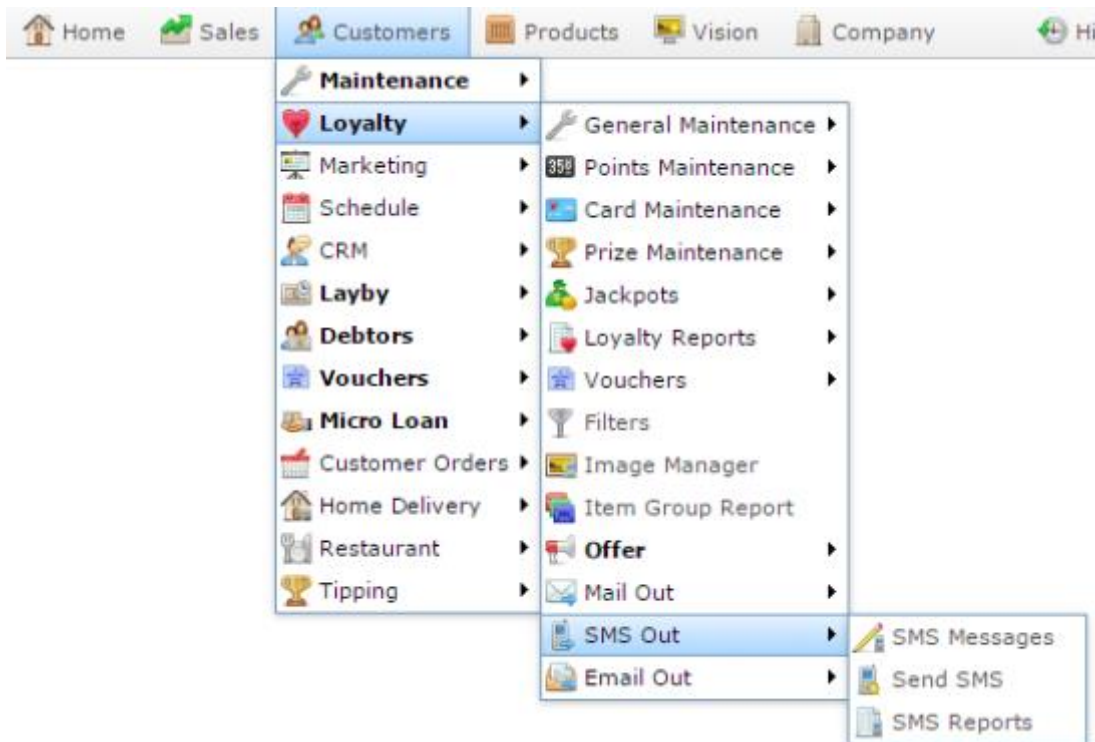
SMS Detail Maintenance screen

Use this screen to create or edit SMS messages.

Opening the SMS Detail Maintenance screen

To open the SMS Detail Maintenance screen:

1. Press  Customers.
2. Press **Loyalty > SMS Out > SMS Messages**.



The SMS List report is displayed.



3. Press the **Description** of the SMS message you want to send.

A popup menu is displayed.

SMS List

Description	Reference	Changed	Created	Message	Portal User
Email	57	27 JUN 2015	26 JUN 2015	Reply STOP to 0447100204 to opt out	Bob
<div style="border: 1px solid yellow; padding: 2px;"> Edit SMS Send SMS </div>					
sk isdjhksdghk	49	07 APR 2014	07 APR 2014	Reply STOP to 0447100204 to opt out	

Date From

Date To

4. Select **Edit SMS**.

The SMS Detail Maintenance screen is displayed.

SMS Detail Maintenance Amc master

Description:

SMS Opt Out Message -> Reply STOP to 0447100204 to opt out

Sender ID: Zen Global

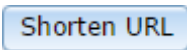
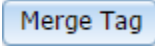
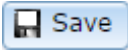
Maximum 1 Block(s)

121 Character Left

Long URL

Short URL

Mail Out Detail Maintenance screen key fields and buttons

Field	Description
Description	Describe the SMS mail out.
Body	Create the SMS mail out to send.
Sender	Select the phone address the SMS should be sent from.
Maximum Block	Select the maximum number of blocks of an SMS being sent.
Characters Left	Displays the number of characters remaining in the SMS block.
Long URL	Copy a long URL into this field to shorten it.
Short URL	Shortened URL you can copy into the body.
	Press to convert a long URL into a short URL.
	Press to use a merge tag to personalise the SMS mail out.
	Press to create a new SMS.
	Press to save changes to the SMS.

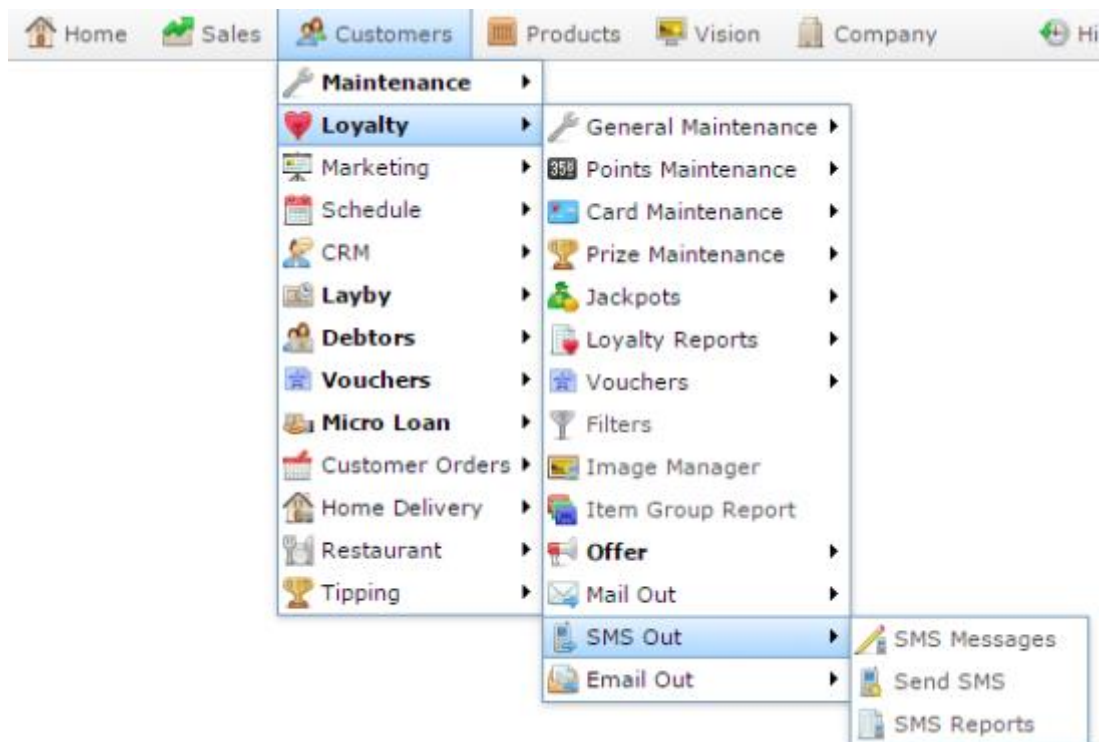
SMS Report Options screen

Select parameters to create a list of customers to send an SMS to.

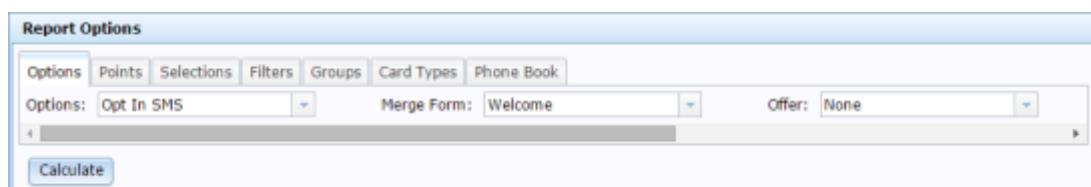
Opening the SMS Report Options screen

To open the SMS Report Options screen:

1. Press  Customers .
2. Press **Loyalty > SMS Out > Send SMS** .



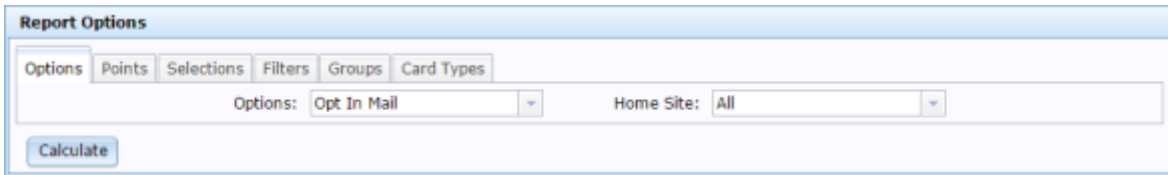
The SMS Report Options screen is displayed.



SMS Report Options screen key fields and buttons

Options tab

Select mail filter options.



The screenshot shows a web interface titled "Report Options". At the top, there are several tabs: "Options", "Points", "Selections", "Filters", "Groups", and "Card Types". The "Options" tab is currently selected. Below the tabs, there are two dropdown menus. The first is labeled "Options:" and is set to "Opt In Mail". The second is labeled "Home Site:" and is set to "All". At the bottom left of the form, there is a "Calculate" button.

Field	Description
Options	Select the type of marketing to report on: Opt in Mail Loyalty members who have opted in to receive marketing material by mail. All All loyalty members who have subscribed to marketing materials.
Home Site	Select the site to report on.

Points tab

Select loyalty points filter options.

The screenshot shows the 'Report Options' dialog box with the 'Points' tab selected. The 'Options' sub-tab is also active. The 'Option' dropdown is set to 'Ignore', 'Points Balance' is set to 'Any', and 'Multiplier' is set to '1'. A 'Calculate' button is located at the bottom left of the dialog.

Field	Description
Option	Select to filter based on whether loyalty points are greater or less than the Points Balance , or Ignore to ignore this option.
Points Balance	Select the loyalty points balance to compare with.
Multiplier	Multiply the points balance to compare. For example, to look for customers with a balance of 500,000 points, select 500 in the Points Balance , and 100 in the Multiplier .

Selections tab

Select general filter options.

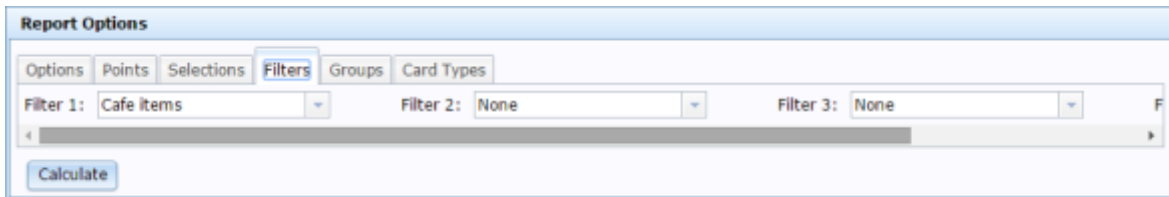
The screenshot shows the 'Report Options' dialog box with the 'Selections' tab selected. The 'Expired Cards' dropdown is set to 'Ignore', 'Birth Month' is set to 'None', and 'Age Range' is set to 'None'. A 'Calculate' button is located at the bottom left of the dialog.

Field	Description
Expired Cards	Select to filter the report to cards that are expired, are not expired, or Ignore to include both expired and not expired cards.

Field	Description
Birth Month	Select the loyalty member's birth month to filter on or None to ignore the birth month.
Age Range	Select the age bracket or specific age to report on or None to not filter on age.
Gender	Select the gender to report on, or Both to ignore gender when filtering.
Names	Select to filter the report by: <ul style="list-style-type: none"> ▪ State ▪ Post code ▪ Names that start with a chosen letter.

Filters tab

Select filter group filter options.



Field	Description
Filter 1	Select a filter to apply.
Filter 2	Select an additional filter to apply: loyalty members must pass all filters to be included.

Field	Description
Filter 3	Select an additional filter to apply: loyalty members must pass all filters to be included.
Filter 4	Select an additional filter to apply: loyalty members must pass all filters to be included.

Groups tab

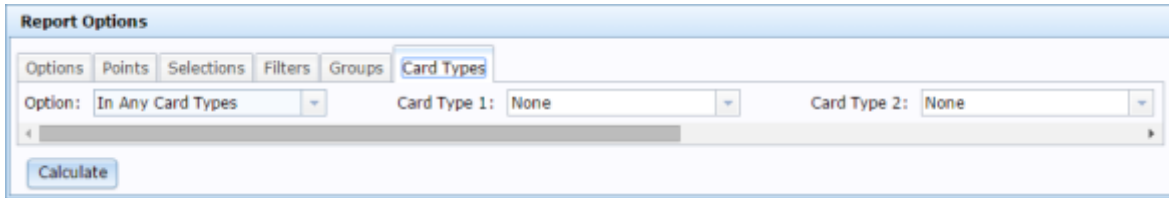
Select loyalty group filter options.

The screenshot shows a 'Report Options' dialog box with the 'Groups' tab selected. The 'Option' dropdown is set to 'In All Groups', 'Group 1' is set to 'None', and 'Group 2' is set to 'None'. A 'Calculate' button is visible at the bottom left of the dialog.

Field	Description
Option	Select whether to: <ul style="list-style-type: none"> ▪ Include the members who are in all the selected groups. ▪ Include the members who are in any of the selected groups. ▪ Include the members who are not in any of the selected groups.
Group 1	Select a loyalty group to filter on.
Group 2	Select a loyalty group to filter on.
Group 3	Select a loyalty group to filter on.
Group 4	Select a loyalty group to filter on.

Card Types tab

Select card type filter options.



Field	Description
Option	Select whether to include: <ul style="list-style-type: none">▪ Loyalty members whose card is one of the selected types.▪ Loyalty members whose card is not any of the selected types.
Card Type 1	Select a card type to filter on.
Card Type 2	Select a card type to filter on.
Card Type 3	Select a card type to filter on.
Card Type 4	Select a card type to filter on.

Phone Book tab

Select loyalty group filter options.

The screenshot shows a software interface titled "Report Options" with a "Phone Book" tab selected. Under the "Include" section, there are three dropdown menus labeled "Phone Book 1:", "Phone Book 2:", and "Phone Book 3:". Each dropdown menu currently displays the word "None". Below these menus is a horizontal scrollbar. At the bottom left of the dialog, there is a "Calculate" button.

Field	Description
Phone Book 1	Select a phone book to include.
Phone Book 2	Select a phone book to include.
Phone Book 3	Select a phone book to include.
Phone Book 4	Select a phone book to include.

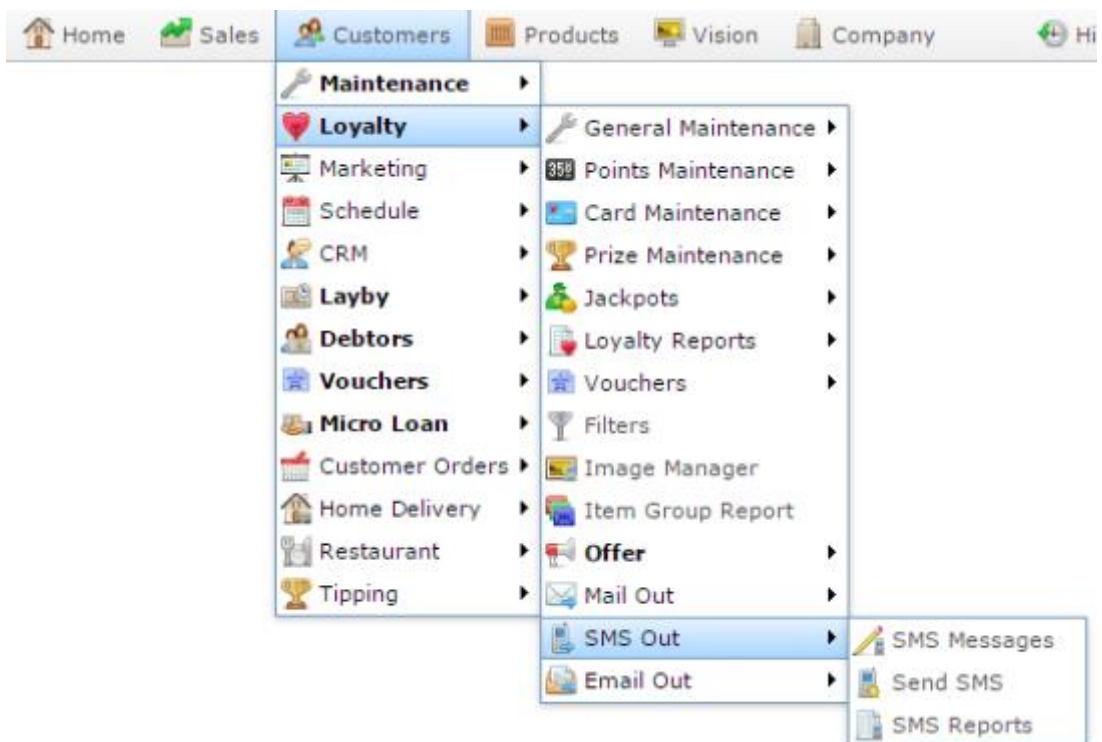
Sites SMS Summary report

Use the Sites SMS Summary report to view the results of SMS messages sent to loyalty members.

Opening the Sites SMS Summary report

To open the SMS Report Options screen:

1. Press  Customers.
2. Press **Loyalty > SMS Out > SMS Reports**.



The Sites SMS Summary report is displayed.

Sites SMS Summary Report For Dates Between 2015-12-08 and 2015-12-08

Site	Job	Count	Units	Opt Out	Sent Ok	Cost
Total						

States

VIC >

Site

Chadstone >

Date From

8/12/2015

Date To

8/12/2015

Offer

Default >

Job

All >

Add to Favourites

Sites SMS Summary report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
States	Select a state or county to filter the report by.
Offer	Select a specific customer offer to report on.

Field	Description
Job	Select the type of communication record to display: <ul style="list-style-type: none">▪ All.▪ Loyalty Events.▪ Lost Loyalty Password.▪ User Messages.▪ Alarms.▪ Support Emails.▪ Debtor Statements.▪ Franchise Event.▪ Franchise Fee.▪ Purchase Order Submit.▪ Purchase Order Response.▪ Purchase Order Requisition.▪ Scheduler.▪ Lay Buy.▪ Micro Loan.
Offer	Select the offer to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site	Site the email or SMS originated from.
Job	Job that the email or SMS relates to. For example, a loyalty event.
Sent OK	Indicates whether the email batch was sent successfully.
Count	Number of emails or SMSs sent in the batch.
Opt Out	Indicates whether the customer elected to opt-out of receiving further marketing material.
Units	The number of SMS messages sent.
Cost	The total cost of the SMS mail out.

Managing filters and reports

Create and edit filters to fine-tune loyalty reports and marketing mail outs.

Also see:

- *Loyalty Filter Maintenance screen* on page 427.
- *Loyalty Filter Report* on page 450.
- *Report Options screen* on page 453.

What you can do:

- *Creating a filter* on page 462.
- *Editing a filter* on page 440.
- *Creating a filter rule* on page 437.
- *Editing a filter rule* on page 442.
- *Deleting a filter* on page 448.
- *Deleting a filter rule* on page 445.

Loyalty reports

- *Loyalty Events report* on page 464.
- *Loyalty Events History report* on page 469.
- *Card Sales report* on page 474.
- *Foreign Loyalty Movement report* on page 479.
- *Frequent Shopper Cards report* on page 482.
- *Frequent Shopper Member report* on page 488.
- *Lost Cards report* on page 493.
- *Loyalty Customers report* on page 497.
- *Loyalty Department report* on page 501.
- *Loyalty Discounts report* on page 506.
- *Loyalty Family Cards report* on page 511.
- *Loyalty Site Movement report* on page 514.
- *Loyalty Movement report* on page 518.
- *Loyalty Customer Purchases by Site report* on page 523.
- *New Loyalty Cards report* on page 529.
- *Pending Expired Points report* on page 532.

Managing filters and reports

- *Pending Lost Cards report* on page 536.
- *Process Renew Cards report* on page 539.
- *Points Ageing report* on page 543.
- *Points Expired By Site report* on page 547.
- *Redemption report* on page 550.
- *Top 10 Loyalty Member report* on page 553.
- *Top 10 Loyalty Members - Details report* on page 558.
- *Loyalty Transaction Extraction report* on page 565.
- *Transactions per Hour report* on page 569.
- *Warning Loyalty Sales report* on page 574.

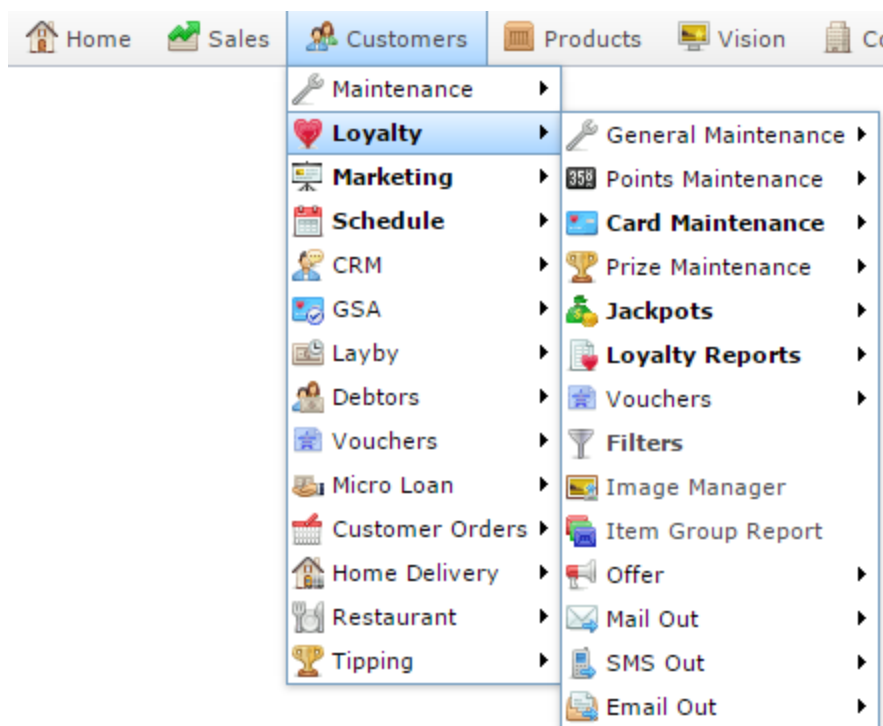
Loyalty Filter Maintenance screen

Use this screen to maintain and edit loyalty filters.

Opening the Loyalty Filter Maintenance screen

To open the Loyalty Filter Maintenance screen:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Filters**.



The Loyalty Filter report is displayed.

Loyalty Filter Report

Filter	Filter Id	Elements	Enabled	Changed	Comments	User
\$ Spend	3	1	✓	16/03/2011		Bob
Filter for sales > 100 after the 1st jan	1	1	✓	6/03/2011	Filter for sales > 100 after the 1st jan	Bob
Item 7122	2	1	✓	6/03/2011	Item Filter	Bob
les test	4	1	✓	10/05/2011		Les

Buttons: Add to Favourites, Create New Filter

3. Press the **Filter** field of the filter you want to open.

The Loyalty Filter Maintenance screen is displayed.

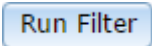
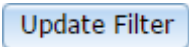
Managing filters and reports

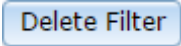
The screenshot shows a web application window titled "Loyalty Filters". At the top, there is a dropdown menu labeled "Filter:" with the value "1 : Cafe items" selected. Below this, there are two tabs: "Details" (which is active) and "Records". The "Details" tab contains the following information: "Description:" with the value "Cafe items", "Last Change:" with the value "8/12/2015", "Changed By:" with the value "bob", and a "Comments:" text input field. At the bottom of the details section, there is a checked checkbox labeled "Enable Filter". At the bottom right of the window, there are three buttons: "Run Filter", "Update Filter", and "Delete Filter".

Loyalty Filter Maintenance screen key fields and buttons

Details tab

Use this area to describe the filter and add any comments regarding its use.

Field	Description
Filter	Select the filter you want to edit from the drop-down list.
Description	Description of the filter.
Last Change	Date the filter was last changed.
Changed By	Name of the Portal operator who last changed the filter.
Comments	Any comment on the purpose of the filter.
Enable Filter	Select to make this filter available to use in the Portal.
	Run a report on this filter, specifying report options.
	Save any changes made to the filter.

Field	Description
	Remove this filter from the Portal.

Records tab

Use this area to define how the filter includes or excludes transactions.

Loyalty Filters

Filter:

Details **Records**

Site:

Transaction:

Department:

Item Code:

Description:

Brand:

Loyalty Item Group:

Open Fields:

Description	Reference	Type	Order	Sites	Option	Target	Date	Trade Date	Date To	Conditions
No Items		undefined		All	undefined	0	undefined	30/12/1899	30/12/1899	undefined

Field

Description

Site

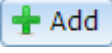
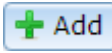
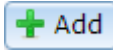
Select the site to restrict the filter-line to from the drop-down list, or **All** to apply it to all sites.

Transaction

Press to add a transaction line to the filter grid.

Department

Select the department and press to add a department line to the filter grid.

Field	Description
Item Code	Find an item and press  to add a specific item to the filter grid.
Description	Description of the selected item.
Brand	Select the brand from the drop-down list and press  to add a brand line to the filter grid.
Loyalty Item Group	Select the item group from the drop-down culture and press  to add a loyalty item group to the filter grid.
Open fields	Select additional conditions and terms to the filter line.
Description	The description of the item, if the filter-line refers to an item. Otherwise, the type of filter line. For example, a filter on transactions or departments.
Reference	The specific item, department, brand, group, etc. referred to in the filter line.
Type	The type of filter line, for example, transactions or item.
Order	The order in which filter lines are applied.
Sites	The site the filter line applies to.

Field	Description
Option	Select an option to filter transactions on:
<p>Note: The metrics of what is being measured depends on how the filter is used. For example, transaction amounts, departments, etc.</p>	
Disabled	Do not use additional filter line options.
Present	Include if the Target is present.
Not Present	Include if the Target is not present.
Equals	Include if the Target is equal.
Not Equals	Include if the Target does not equal.
Like	Include if the Target is similar.
Not Like	Include if the Target is not similar.
> Total Sales	Include if the total sales is less than the Target .
< Total Sales	Include if the total sales is greater than the Target .
> Total Quantity	Include if the total quantity is less than the Target .
< Total Quantity	Include if the total quantity is greater than the Target .
> Total Points	Include if the total loyalty points awarded is less than the Target .
< Total Points	Include if the total loyalty points awarded is greater than the Target .

Field	Description
Target	Type the target to use with the Option selection.

Field	Description
Date	Select the date range to start the filter line or All to ignore dates:
All	Include all date ranges.
> Trade Date	Include if the transaction occurred after the Trade Date .
< Trade Date	Include if the transaction occurred before the Trade Date .
>= Trade Date	Include if the transaction occurred on or after the Trade Date .
<= Trade Date	Include if the transaction occurred on or before the Trade Date .
Between Dates	Include if the transaction occurred between the Date and the Date To .
Not Between Dates	Include if the transaction occurred during a period excluding between the Date and Date To .
Last Month	Include if the transaction occurred in the last month.
Last 3 Months	Include if the transaction occurred in the last three months.
Last 6 Months	Include if the transaction occurred in the last six months.
Last 12 Months	Include if the transaction occurred in the last twelve months.
Last 24 Months	Include if the transaction occurred in the last twenty-four months.
Not Last Month	Include if the transaction occurred during a time other than in the last month.

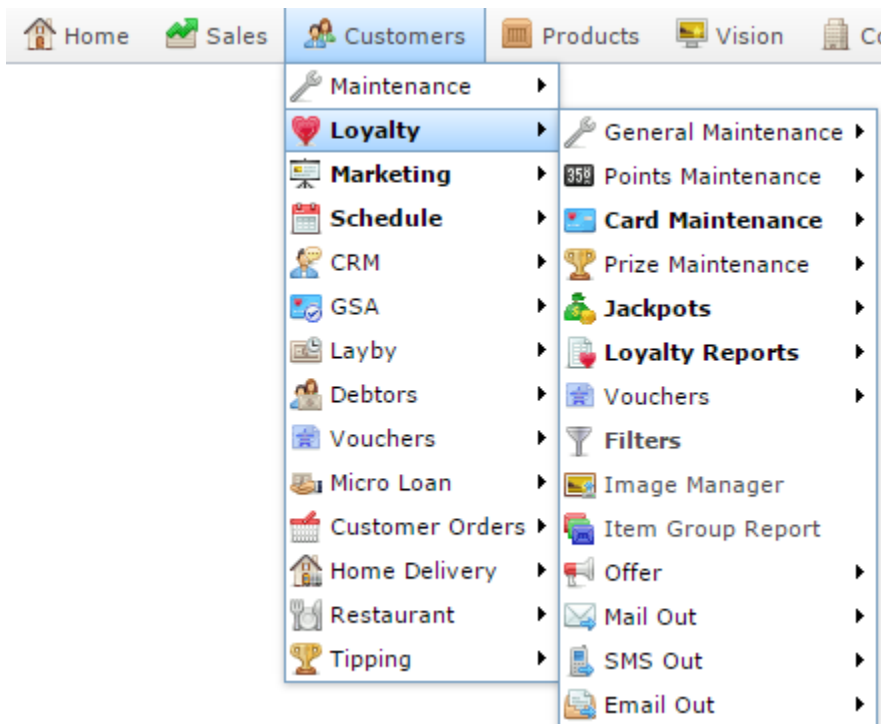
Field	Description
Trade Date	Select the date of transactions to include.
Date To	Select the date to end the filter line.
Conditions	Select whether this filter line is inclusive or cumulative: Or Data is included if it fits either of the filter lines. <hr/> And Data is only included if it fits both of the filter lines.

Creating a filter rule

Create a filter rule to filter loyalty transactions according to specific rules. You can use multiple rules to create very specific filters.

To create a new filter rule:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Filters**.



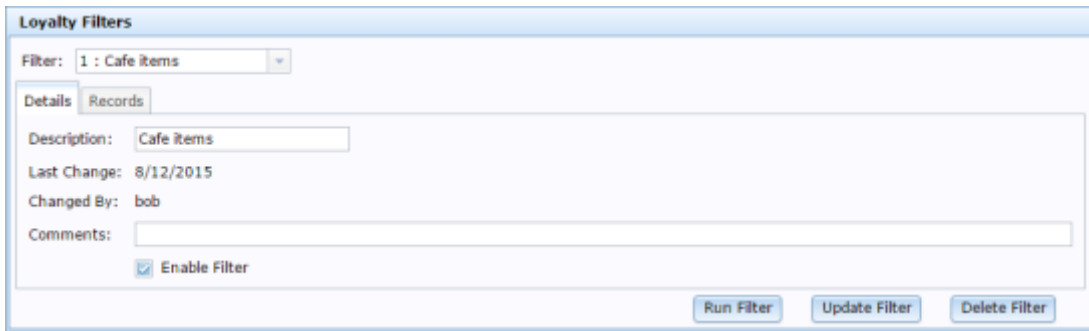
The Loyalty Filter report is displayed.

Loyalty Filter Report

Filter	Filter Id	Elements	Enabled	Changed	Comments	User
\$ Spend	3	1	✓	16/03/2011		Bob
Filter for sales > 100 after the 1st jan	1	1	✓	6/03/2011	Filter for sales > 100 after the 1st jan	Bob
Item 7122	2	1	✓	6/03/2011	Item Filter	Bob
les test	4	1	✓	10/05/2011		Les

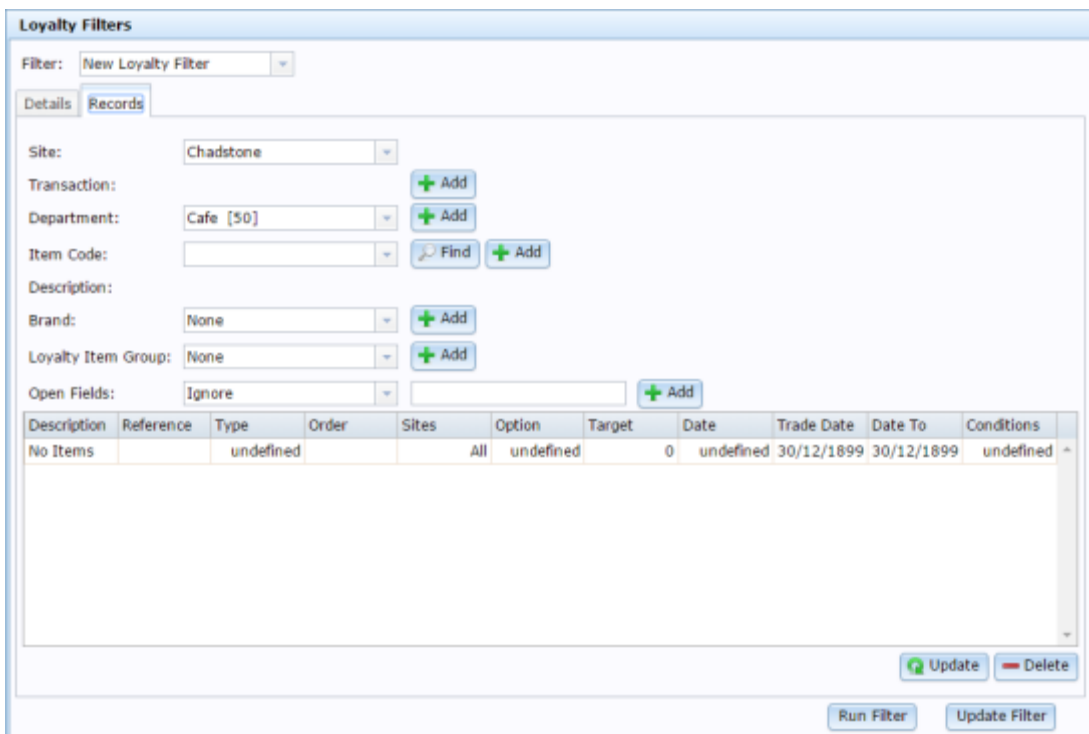
Buttons: Add to Favourites, Create New Filter

3. Press the **Filter** field of the filter you want to open.
The Loyalty Filter Maintenance screen is displayed.



4. Press the Records tab.

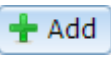
The Records tab is displayed.



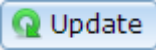
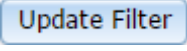
5. Select whether to restrict the filter to a site or all sites from the **Site** drop-down list.

6. Select the filter rule drop-down you want to add:

- Transaction
- Department
- Item
- Brand
- Item group
- Transaction lines, quantity or loyalty points.

7. Press  next to the drop-down you want to add.


The filter is added to the grid.

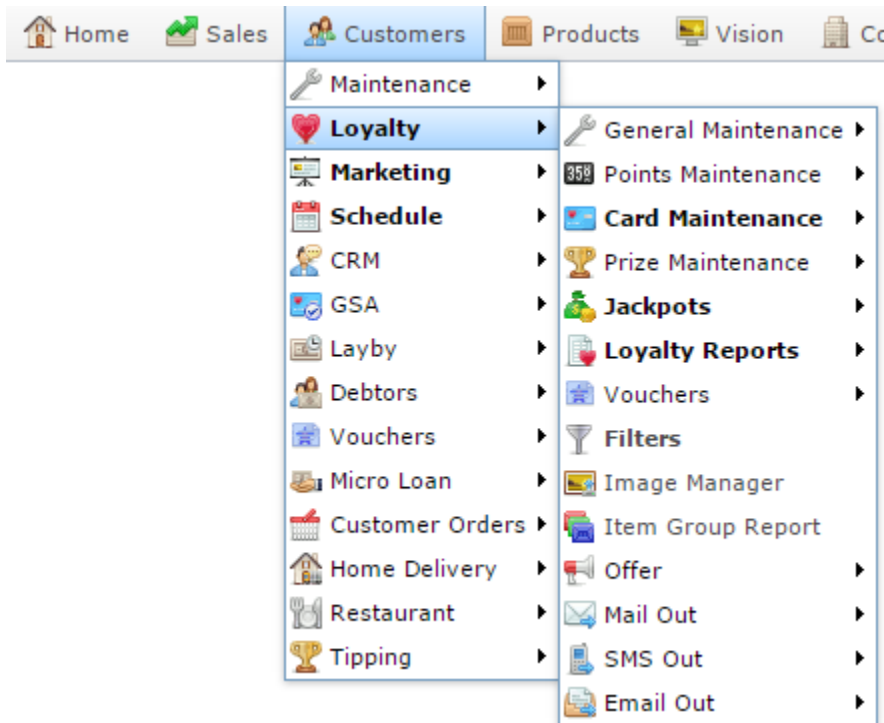
8. Select any additional options from the **Order** or **Target** fields, if applicable.
9. Press  to save any changes to the filter rules.
10. Press  to save changes to the filter.

Editing a filter

Edit a filter to change how the rules are applied.

To edit a filter:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Filters**.



The Loyalty Filter report is displayed.

Loyalty Filter Report

Filter	Filter Id	Elements	Enabled	Changed	Comments	User
\$ Spend	3	1	✓	16/03/2011		Bob
Filter for sales > 100 after the 1st jan	1	1	✓	6/03/2011	Filter for sales > 100 after the 1st jan	Bob
Item 7122	2	1	✓	6/03/2011	Item Filter	Bob
les test	4	1	✓	10/05/2011		Les

Buttons: Add to Favourites, Create New Filter

3. Press the **Filter** field of the filter you want to open.

The Loyalty Filter Maintenance screen is displayed.

Loyalty Filters

Filter: 1 : Cafe items

Details Records

Description: Cafe items

Last Change: 8/12/2015

Changed By: bob

Comments:

Enable Filter

Run Filter Update Filter Delete Filter

4. Press the Records tab.

The Records tab is displayed.

Loyalty Filters

Filter: New Loyalty Filter

Details Records

Site: Chadstone

Transaction: + Add

Department: Cafe [50] + Add

Item Code: Find + Add

Description: + Add

Brand: None + Add

Loyalty Item Group: None + Add

Open Fields: Ignore + Add

Description	Reference	Type	Order	Sites	Option	Target	Date	Trade Date	Date To	Conditions
No Items		undefined		All	undefined	0	undefined	30/12/1899	30/12/1899	undefined

Update Delete

Run Filter Update Filter

5. Add or edit filter rules in the filter grid.

See *Creating a filter rule* on page 437.

Also see *Editing a filter rule* on page 442.

6. Press **Update Filter**.

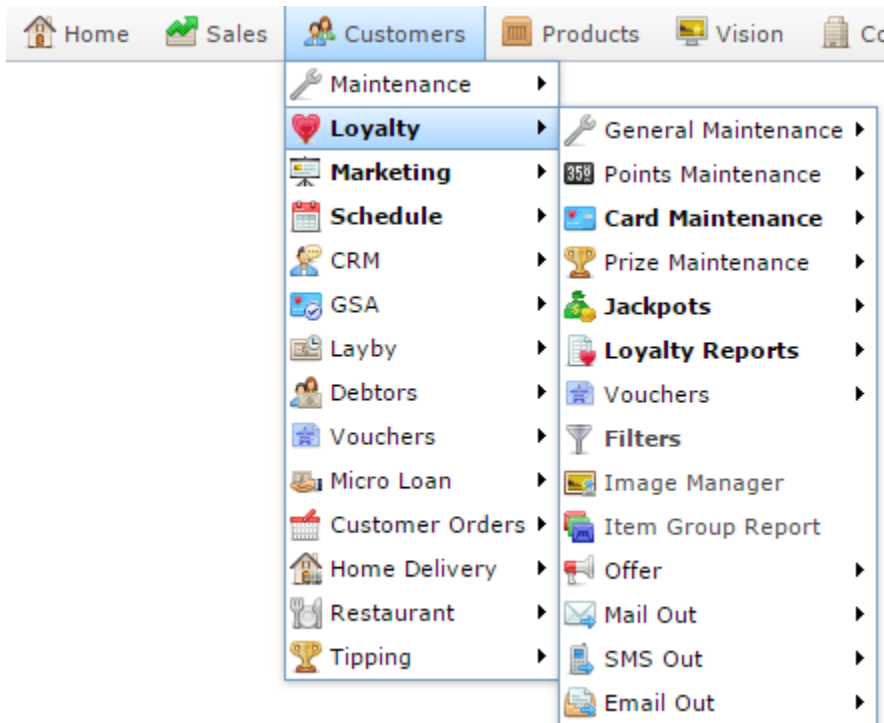
The filter is saved.

Editing a filter rule

Edit a filter rule to modify the rules that the filter uses.

To edit a filter rule:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Filters**.



The Loyalty Filter report is displayed.

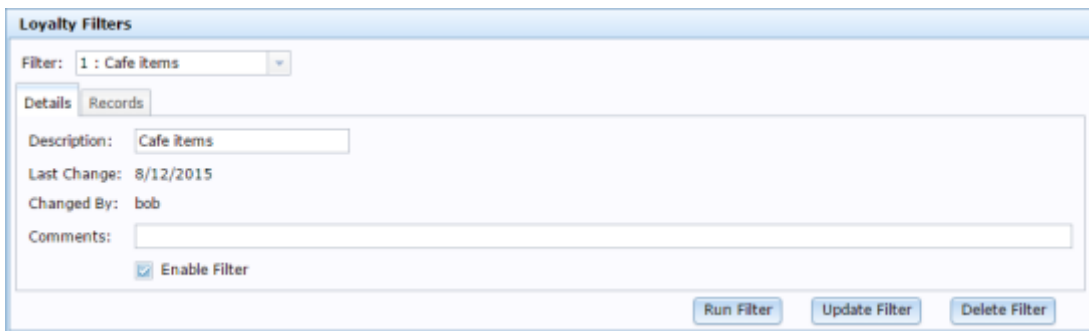
Loyalty Filter Report

Filter	Filter Id	Elements	Enabled	Changed	Comments	User
\$ Spend	3	1	✓	16/03/2011		Bob
Filter for sales > 100 after the 1st jan	1	1	✓	6/03/2011	Filter for sales > 100 after the 1st jan	Bob
Item 7122	2	1	✓	6/03/2011	Item Filter	Bob
les test	4	1	✓	10/05/2011		Les

Buttons: Add to Favourites, Create New Filter

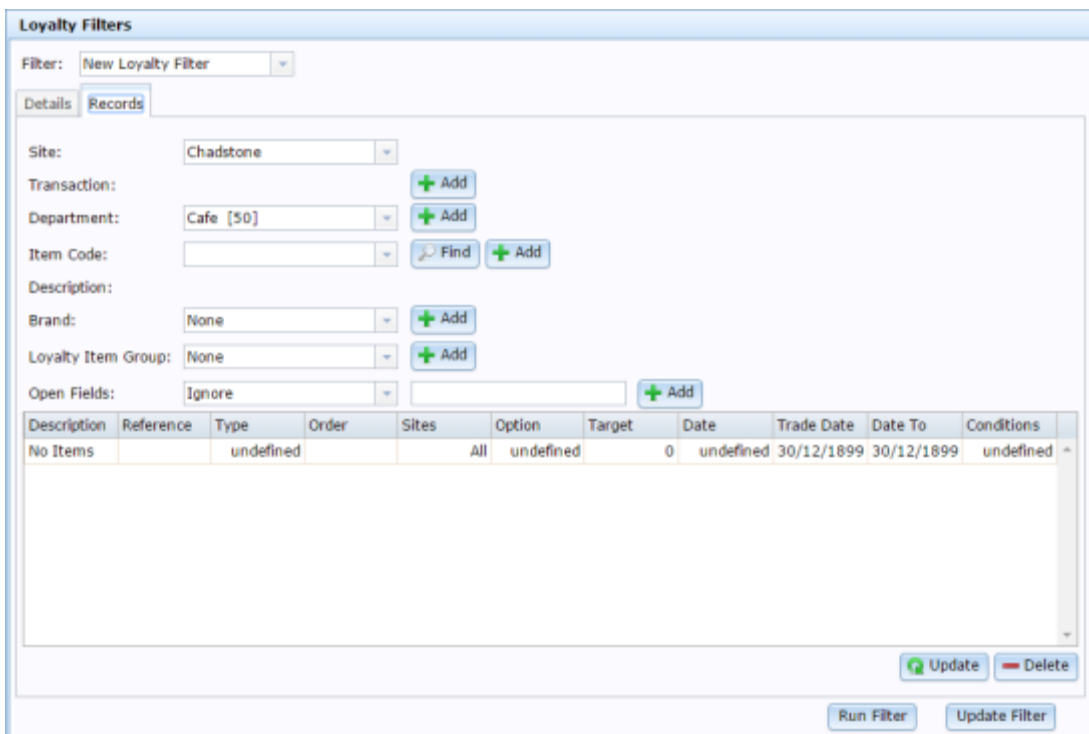
3. Press the **Filter** field of the filter you want to open.

The Loyalty Filter Maintenance screen is displayed.



4. Press the Records tab.

The Records tab is displayed.



5. Select the rule you want to edit in the filter grid.

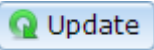
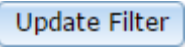
The screenshot shows the 'Loyalty Filters' interface. At the top, there is a 'Filter:' dropdown menu set to '1 : Cafe items'. Below this are two tabs: 'Details' and 'Records'. The 'Details' tab is active, showing various filter criteria with dropdown menus and '+ Add' buttons:

- Site: Chadstone
- Transaction: (empty) + Add
- Department: Cafe [50] + Add
- Item Code: (empty) Find + Add
- Description: (empty)
- Brand: None + Add
- Loyalty Item Group: None + Add
- Open Fields: Ignore + Add

Below the filter fields is a table with the following data:

Description	Reference	Type	Order	Sites	Option	Target	Date	Trade Date	Date To	Conditions
Department	Cafe [50]	Item	1	Chadstone	Present	0	All	8/12/2015	8/12/2015	Or

At the bottom right of the interface are buttons for 'Update' and 'Delete'. At the very bottom are buttons for 'Run Filter', 'Update Filter', and 'Delete Filter'.

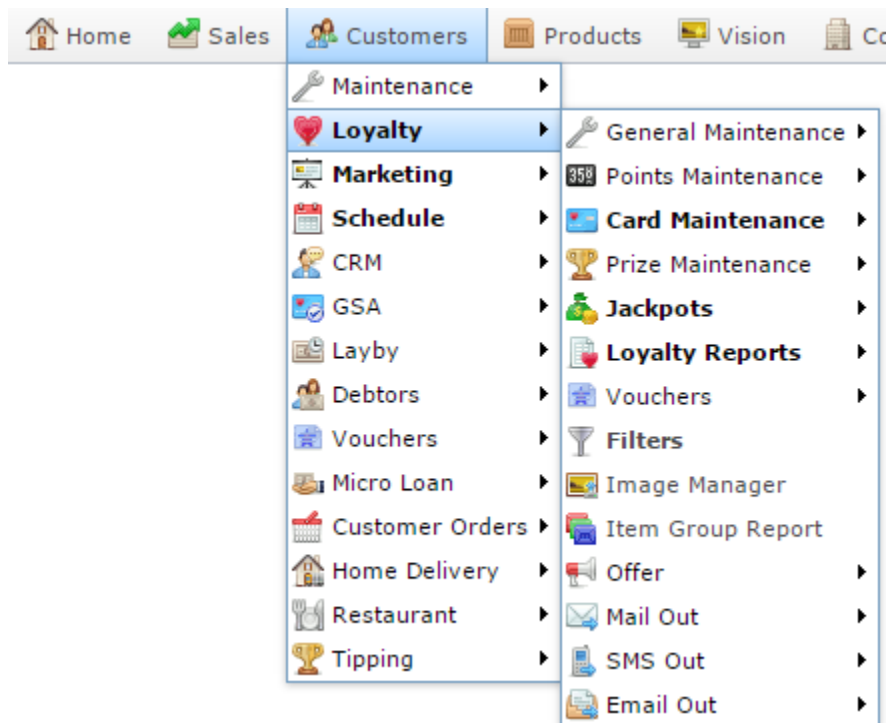
6. Select the new options from the drop-down fields.
7. Press  to save any changes to the filter rules.
8. Press  to save changes to the filter.

Deleting a filter rule

Delete a filter rule to remove the rule from the filter.

To delete a filter rule:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Filters**.



The Loyalty Filter report is displayed.

Loyalty Filter Report

Filter	Filter Id	Elements	Enabled	Changed	Comments	User
\$ Spend	3	1	✓	16/03/2011		Bob
Filter for sales > 100 after the 1st jan	1	1	✓	6/03/2011	Filter for sales > 100 after the 1st jan	Bob
Item 7122	2	1	✓	6/03/2011	Item Filter	Bob
les test	4	1	✓	10/05/2011		Les

Buttons: Add to Favourites, Create New Filter

3. Press the **Filter** field of the filter you want to open.

The Loyalty Filter Maintenance screen is displayed.

Managing filters and reports

Loyalty Filters

Filter: 1 : Cafe items

Details Records

Description: Cafe items

Last Change: 8/12/2015

Changed By: bob

Comments:

Enable Filter

Run Filter Update Filter Delete Filter

4. Press the Records tab.

The Records tab is displayed.

Loyalty Filters

Filter: 1 : Cafe items

Details Records

Site: Chadstone

Transaction: + Add

Department: Cafe [50] + Add

Item Code: Find + Add

Description:

Brand: None + Add

Loyalty Item Group: None + Add

Open Fields: Ignore + Add

Description	Reference	Type	Order	Sites	Option	Target	Date	Trade Date	Date To	Conditions
Department	Cafe [50]	Item	1	Chadstone	Present	0	All	8/12/2015	8/12/2015	Or

Update Delete

Run Filter Update Filter Delete Filter

5. Select the rule you want to delete in the filter grid.

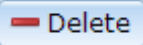
The screenshot shows the 'Loyalty Filters' window. At the top, there is a 'Filter:' dropdown menu set to '1 : Cafe items'. Below this are two tabs: 'Details' and 'Records'. The 'Details' tab is active, showing various filter criteria with dropdown menus and '+ Add' buttons:

- Site: Chadstone
- Transaction: (empty) + Add
- Department: Cafe [50] + Add
- Item Code: (empty) Find + Add
- Description: (empty)
- Brand: None + Add
- Loyalty Item Group: None + Add
- Open Fields: Ignore + Add

Below the details is a table with the following data:

Description	Reference	Type	Order	Sites	Option	Target	Date	Trade Date	Date To	Conditions
Department	Cafe [50]	Item	1	Chadstone	Present	0	All	8/12/2015	8/12/2015	Or


At the bottom of the window, there are buttons for 'Update' and 'Delete' (with a red minus icon). Below the window, there are three buttons: 'Run Filter', 'Update Filter', and 'Delete Filter'.

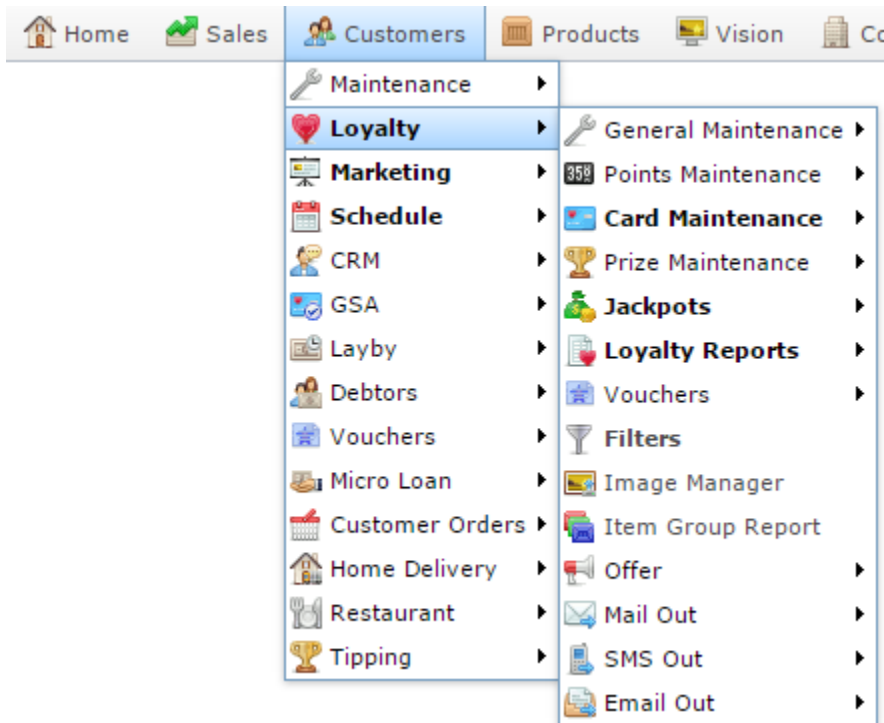
6. Press  to delete the filter rule.

Deleting a filter

Delete a filter if you no longer want to apply it to Portal reports.

To delete a filter:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Filters**.



The Loyalty Filter report is displayed.

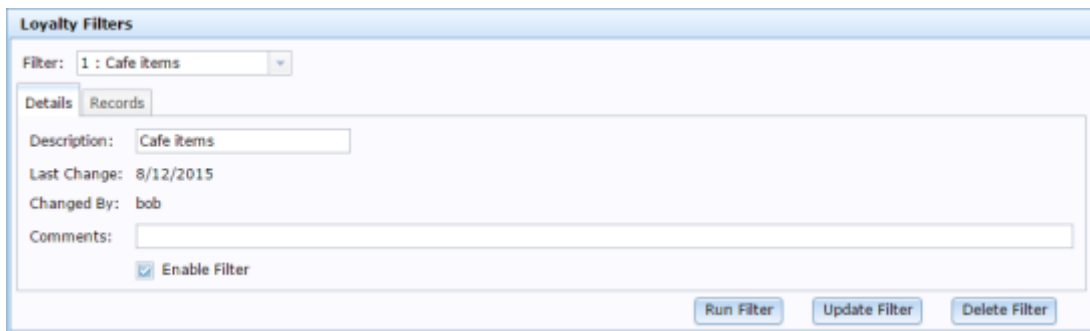
Loyalty Filter Report

Filter	Filter Id	Elements	Enabled	Changed	Comments	User
\$ Spend	3	1	✓	16/03/2011		Bob
Filter for sales > 100 after the 1st jan	1	1	✓	6/03/2011	Filter for sales > 100 after the 1st jan	Bob
Item 7122	2	1	✓	6/03/2011	Item Filter	Bob
les test	4	1	✓	10/05/2011		Les

Buttons: Add to Favourites, Create New Filter

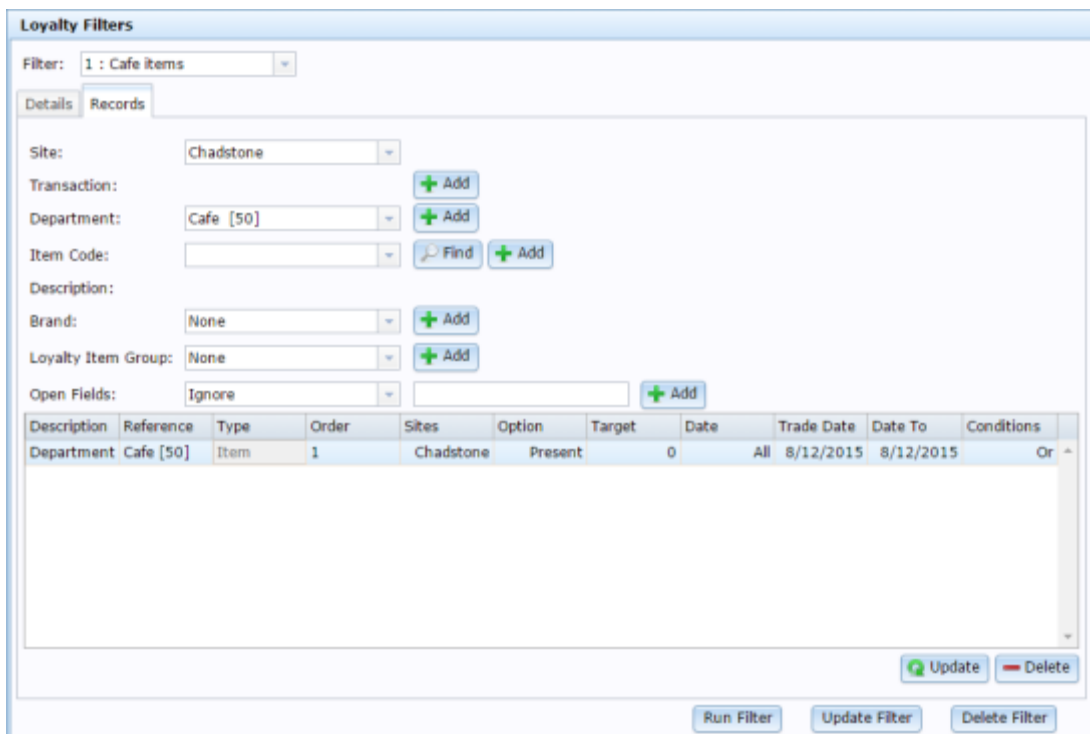
3. Press the **Filter** field of the filter you want to open.

The Loyalty Filter Maintenance screen is displayed.



1. Press the Records tab.

The Records tab is displayed.



2. Press **Delete Filter**.

The filter is deleted.

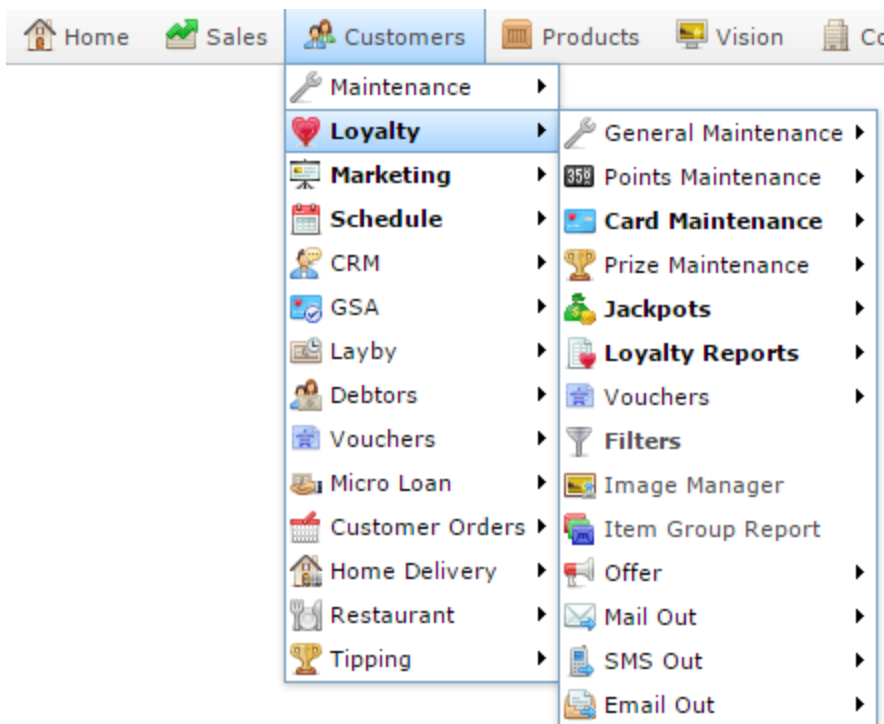
Loyalty Filter Report

Use the Loyalty Filter report to view or edit filters to use with loyalty reports.

Opening the Loyalty Filter report

To open the Loyalty Filter report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Filters**.



The Loyalty Filter report is displayed.

Loyalty Filter Report



Filter	Filter Id	Elements	Enabled	Changed	Comments	User
\$ Spend	3	1	✓	16/03/2011		Bob
Filter for sales > 100 after the 1st jan	1	1	✓	6/03/2011	Filter for sales > 100 after the 1st jan	Bob
Item 7122	2	1	✓	6/03/2011	Item Filter	Bob
les test	4	1	✓	10/05/2011		Les

[Add to Favourites](#) [Create New Filter](#)

Loyalty Filter report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to create a new filter group.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Filter	Name of the loyalty filter.
Filter Id	Unique code identifying the filter
Elements	Number of elements the filter utilises.
Enabled	Whether the filter is available for use within the Portal.
Changed	Date the filter was last changed.
Comments	Comment on the filter.
User	User who last edited the filter.

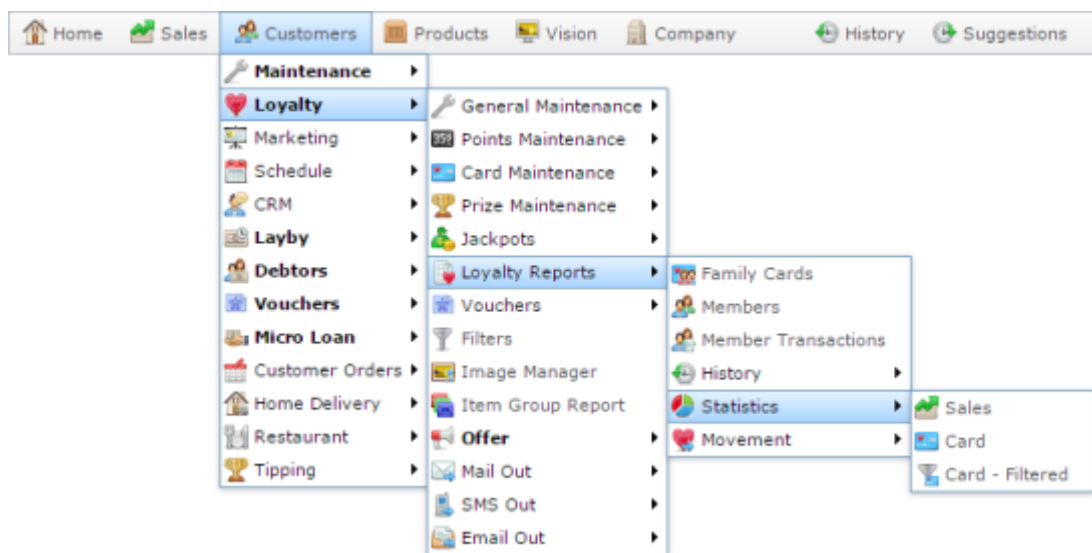
Report Options screen

Use the Report Options screen to select options to display in a report.

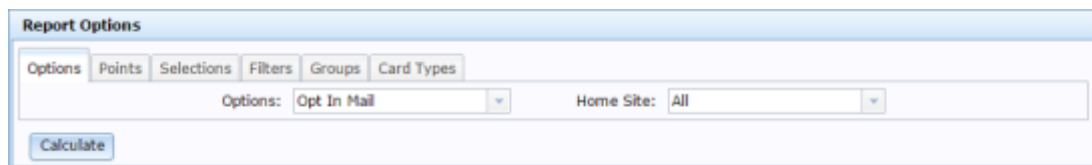
Opening the Report Options screen

To open the Report Options screen:

1. Press  Customers .
2. Press **Loyalty > Loyalty Reports > Statistics > Card - Filtered** .



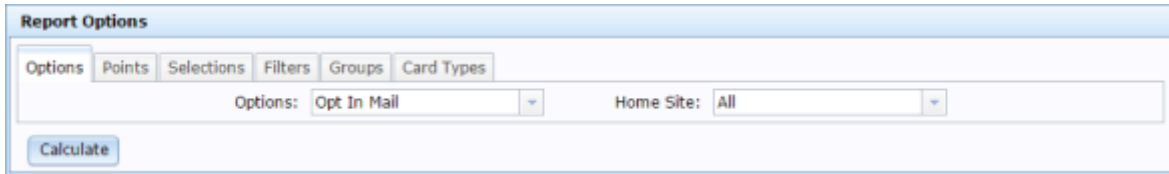
The Report Options screen is displayed.



Report Options screen key fields and buttons

Options tab

Select mail or email filter options.

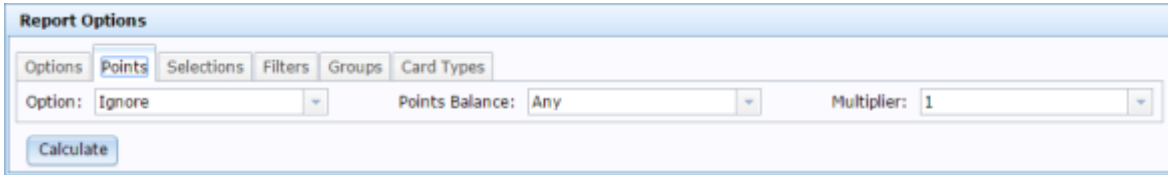


The screenshot shows a web interface titled "Report Options". At the top, there are several tabs: "Options", "Points", "Selections", "Filters", "Groups", and "Card Types". The "Options" tab is currently selected. Below the tabs, there are two dropdown menus. The first is labeled "Options:" and is set to "Opt In Mail". The second is labeled "Home Site:" and is set to "All". At the bottom left of the interface, there is a "Calculate" button.

Field	Description
Options	Select the type of marketing to report on:
Opt in Mail	Loyalty members who have opted in to receive marketing material by mail.
Opt in Email	Loyalty members who have opted in to receive marketing material by email.
Opted in Email	Loyalty members who have responded to an email that asked permission to send them marketing material.
Confirmed Email	Loyalty members who have responded to an email that confirmed their email address was correct.
Opt in SMS	Loyalty members who have opted in to receive marketing material by SMS.
All	All loyalty members who have subscribed to marketing materials.
Non-MailChimp subscribers	Loyalty members who have not subscribed by MailChimp.
Home Site	Select the site to report on.

Points tab

Select loyalty points filter options.



Report Options

Options Points Selections Filters Groups Card Types

Option: Ignore Points Balance: Any Multiplier: 1

Calculate

Field	Description
Option	Select to filter based on whether loyalty points are greater or less than the Points Balance , or Ignore to ignore this option.
Points Balance	Select the loyalty points balance to compare with.
Multiplier	Multiply the points balance to compare. For example, to look for customers with a balance of 500,000 points, select 500 in the Points Balance , and 100 in the Multiplier .

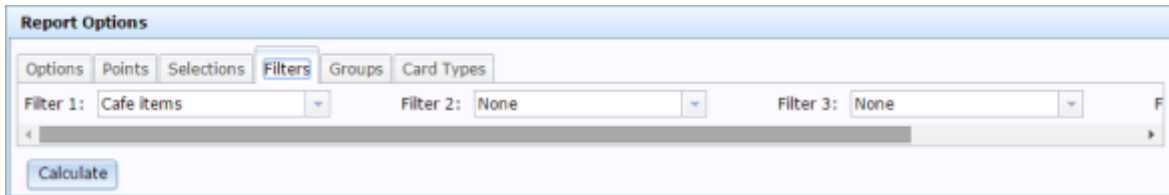
Selections tab

Select general filter options.

Field	Description
Expired Cards	Select to filter the report to cards that are expired, are not expired, or Ignore to include both expired and not expired cards.
Birth Month	Select the loyalty member's birth month to filter on or None to ignore the birth month.
Age Range	Select the age bracket or specific age to report on or None to not filter on age.
Gender	Select the gender to report on, or Both to ignore gender when filtering.
Names	Select to filter the report by: <ul style="list-style-type: none"> ▪ State ▪ Post code ▪ Names that start with a chosen letter.

Filters tab

Select filter group filter options.



The screenshot shows a 'Report Options' dialog box with a 'Filters' tab selected. It contains three filter selection fields: 'Filter 1: Cafe Items', 'Filter 2: None', and 'Filter 3: None'. A 'Calculate' button is located at the bottom left of the dialog.

Field	Description
Filter 1	Select a filter to apply.
Filter 2	Select an additional filter to apply: customers must pass all filters to be included.
Filter 3	Select an additional filter to apply: customers must pass all filters to be included.
Filter 4	Select an additional filter to apply: customers must pass all filters to be included.

Groups tab

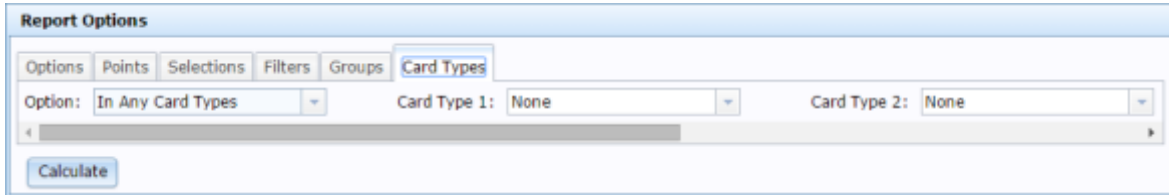
Select loyalty group filter options.

The screenshot shows a 'Report Options' window with several tabs: Options, Points, Selections, Filters, Groups (selected), and Card Types. Below the tabs, there are three dropdown menus: 'Option:' with 'In All Groups' selected, 'Group 1:' with 'None' selected, and 'Group 2:' with 'None' selected. A 'Calculate' button is located at the bottom left of the window.

Field	Description
Option	Select whether to: <ul style="list-style-type: none"> ▪ Include the members who are in all the selected groups. ▪ Include the members who are in any of the selected groups. ▪ Include the members who are not in any of the selected groups.
Group 1	Select a loyalty group to filter on.
Group 2	Select a loyalty group to filter on.
Group 3	Select a loyalty group to filter on.
Group 4	Select a loyalty group to filter on.

Card Types tab

Select card type filter options.



The screenshot shows a 'Report Options' dialog box with the 'Card Types' tab selected. The 'Option' dropdown is set to 'In Any Card Types'. There are two 'Card Type' dropdowns, both set to 'None'. A 'Calculate' button is located at the bottom left of the dialog.

Field	Description
Option	Select whether to include: <ul style="list-style-type: none">▪ Loyalty members whose card is one of the selected types.▪ Loyalty members whose card is not any of the selected types.
Card Type 1	Select a card type to filter on.
Card Type 2	Select a card type to filter on.
Card Type 3	Select a card type to filter on.
Card Type 4	Select a card type to filter on.

Phone Book tab

Select loyalty group filter options.

The screenshot shows a 'Report Options' window with several tabs: Options, Points, Selections, Filters, Groups, Card Types, and Phone Book. The 'Phone Book' tab is active. Under the 'Include' section, there are three dropdown menus labeled 'Phone Book 1', 'Phone Book 2', and 'Phone Book 3'. Each dropdown menu currently displays 'None'. Below these dropdowns is a horizontal scrollbar. At the bottom left of the window is a 'Calculate' button.

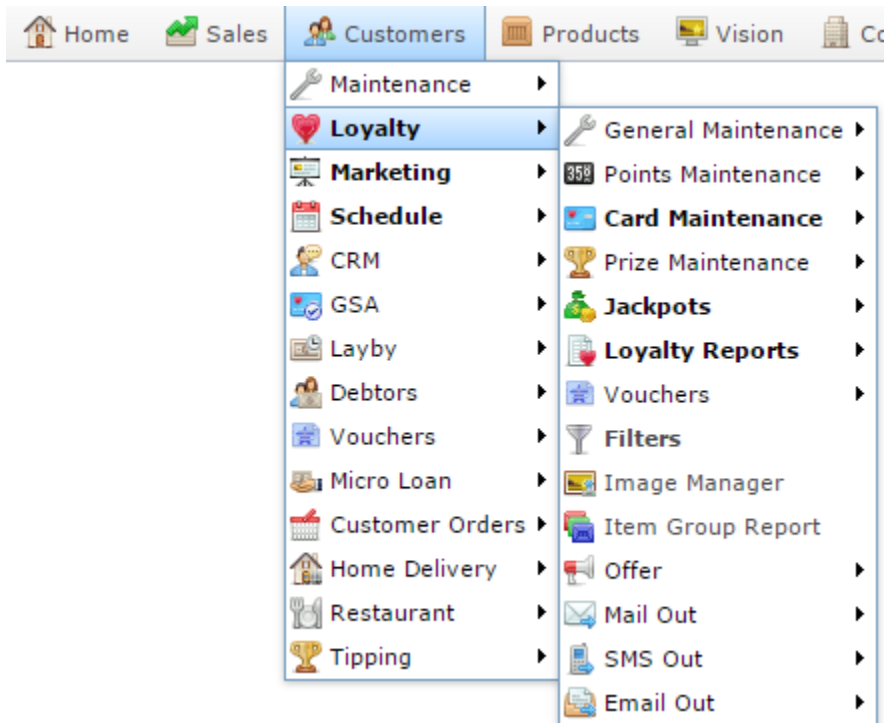
Field	Description
Phone Book 1	Select a phone book to include.
Phone Book 2	Select a phone book to include.
Phone Book 3	Select a phone book to include.
Phone Book 4	Select a phone book to include.

Creating a filter

Create a filter to use it to report on specific sections of loyalty customers.

To create a filter:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Filters**.




The Loyalty Filter report is displayed.

Loyalty Filter Report

Filter	Filter Id	Elements	Enabled	Changed	Comments	User
\$ Spend	3	1	✓	16/03/2011		Bob
Filter for sales > 100 after the 1st jan	1	1	✓	6/03/2011	Filter for sales > 100 after the 1st jan	Bob
Item 7122	2	1	✓	6/03/2011	Item Filter	Bob
les test	4	1	✓	10/05/2011		Les

[Add to Favourites](#) [Create New Filter](#)

1. Press .

The Loyalty Filter Maintenance screen is displayed.

Loyalty Filters

Filter: 1 : Cafe items

Details | Records

Description: Cafe items

Last Change: 8/12/2015

Changed By: bob

Comments:

Enable Filter

Run Filter Update Filter Delete Filter

2. Type a name to identify the filter in the **Description** field.
3. Press the Records tab.

The Records tab is displayed.

Loyalty Filters

Filter: New Loyalty Filter

Details | Records

Site: Chadstone

Transaction: + Add

Department: Cafe [50] + Add

Item Code: Find + Add

Description:

Brand: None + Add

Loyalty Item Group: None + Add

Open Fields: Ignore + Add

Description	Reference	Type	Order	Sites	Option	Target	Date	Trade Date	Date To	Conditions
No Items		undefined		All	undefined	0	undefined	30/12/1899	30/12/1899	undefined

Update Delete

Run Filter Update Filter

4. Add filter rules to the filter grid.
See *Creating a filter rule* on page 437.

5. Press **Update Filter**.

The filter is saved.


Loyalty Events report

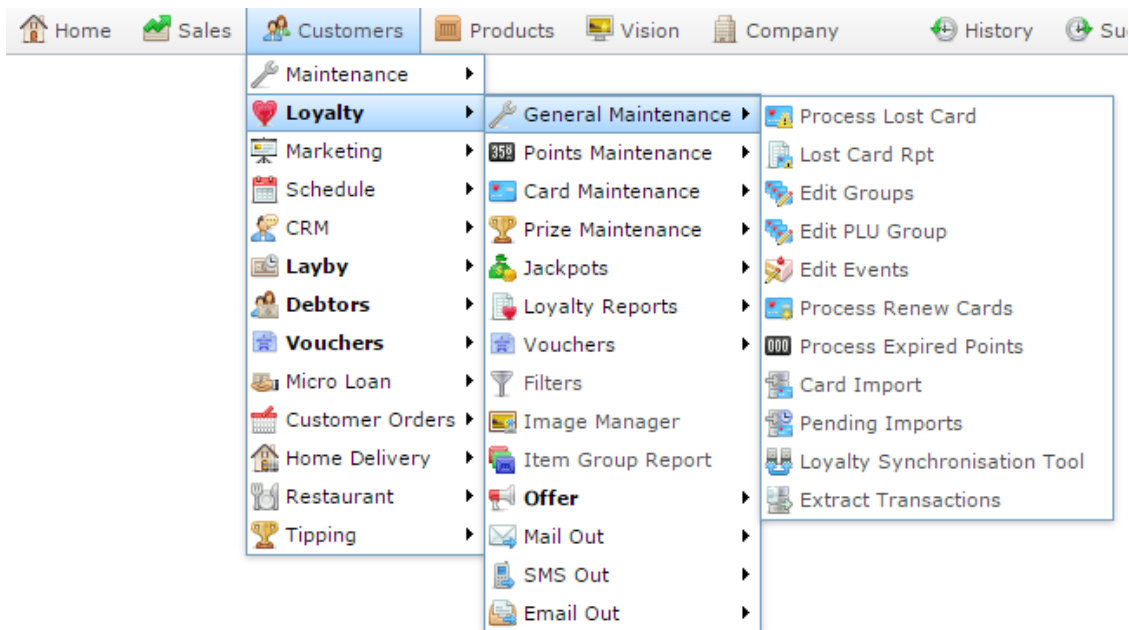
Use the Loyalty Events report to view past loyalty events such as customers joining your loyalty program, or having birthdays. Press an event's description to drill down into the specific event details.

See *Loyalty Events History report* on page 469.

Opening the Loyalty Events report

To open the Loyalty Events report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Edit Events**.



The Loyalty Events report is displayed.

Loyalty Event Report



Add to Favourites

Loyalty Event	Descript	Event Type	Points Multipli	Bonus	Offer	Minimu Count	Maximu Count	Card Type	Loyalty Group	Site	Enabled
3	web signup	Self Update	1	0	All	0	1	All	All	All	
5	Bob Enquiry	Transac	1	100	All	0	100	All	Bob Email Test	FLC	✓
6	FLC Compai Day	Transac	1	100	All	0	100	All	FLC	FLC	✓
1	Welcon to the Club	Loyalty Welcon	1	0	All	0	1	All	All	All	✓
2	Happy Birthda	On Birthda	2	0	All	0	1	All	All	All	
4	mkttto yalty	Market to Loyalty Welcon	1	0	All	0	1	All	All	All	

Managing filters and reports

Loyalty Events report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Loyalty Event	Unique code identifying the loyalty event.
Description	Description of the loyalty event. For example, a birthday bonus.
Event Type	Type of loyalty event.
Points Multiplier	The number that all loyalty points accrued at this event are multiplied by. For example, if all loyalty points are doubled, the multiplier is 2.
Bonus	The loyalty point bonus accrued at this event.
Offer	The offers that this event is eligible for.
Minimum Count	The number of items a loyalty member must purchased to participate in this event.
Maximum Count	The maximum number of items a loyalty member may purchase while participating in this event.


Field	Description
Card Type	The card type of the loyalty member.
Loyalty Group	The loyalty groups that were eligible to participate in the event.
Site	The site the event occurred at.
Enabled	Whether the event is currently active in the Portal.

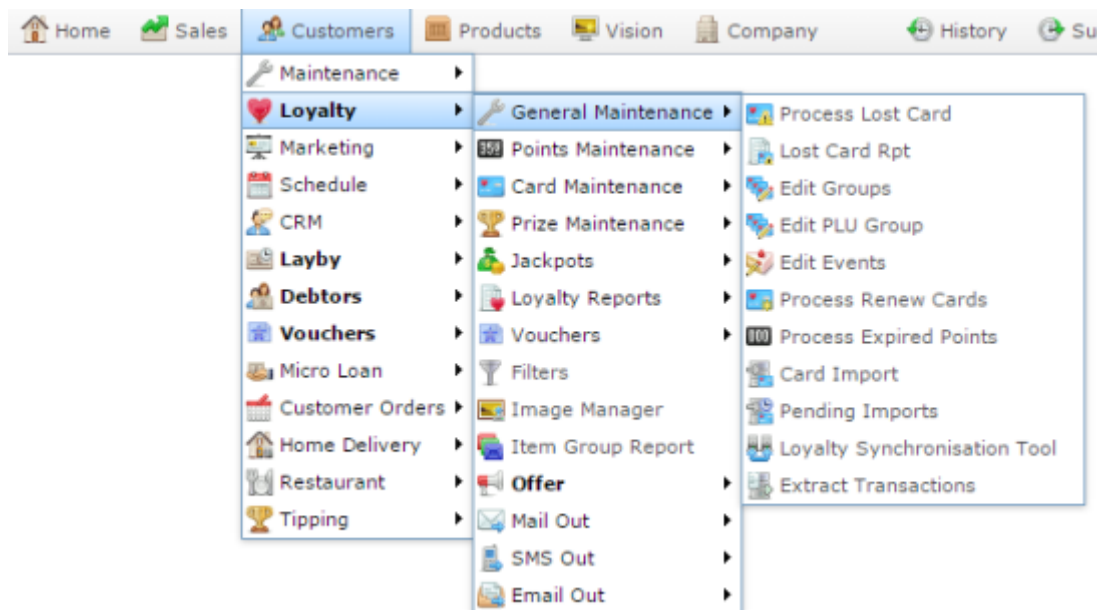
Loyalty Events History report

Use the Loyalty Events History report to view loyalty members' participation in past loyalty events.

Opening the Loyalty Events History report

To open the Loyalty Events History report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Edit Events**.



The Loyalty Events report is displayed.

Loyalty Event Report

Loyalty Event	Description	Event Type	Points Multiplier	Bonus	Offer	Minimum Count	Maximum Count	Card Type	Loyalty Group	Site	Enabled
3	web signup	Self Update	1	0	All	0	1	All	All	All	
5	Bob Enquiry	Transac	1	100	All	0	100	All	Bob Email Test	FLC	✓
6	ELC Company Day	Transac	1	100	All	0	100	All	FLC	FLC	✓
1	Welcome to the Club	Loyalty Welcome	1	0	All	0	1	All	All	All	✓
2	Happy Birthda	On Birthda	2	0	All	0	1	All	All	All	
4	mkttv	Market to Loyalty Welcome	1	0	All	0	1	All	All	All	

Add to Favourites

3. Press the **Description** of the loyalty event you want to view.
A popup menu is displayed.
4. Press **Display Loyalty Event**.
The Loyalty Events History report is displayed.

Loyalty Events History Report : Welcome to the Club [1]

Loyalty Event	Event Type	Points	Card #	Card Type	Loyalty Group	Site	Date	Time
1	Loyalty Welcome	0	27314443	All	All	Chadstone	6/10/2015	6/10/2015 14:56:20

Site
Chadstone >

Date From
21/09/2015

Date To
21/10/2015

Add to Favourites

Loyalty Events History report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Loyalty Event	Unique code identifying the loyalty event.
Event Type	Type of loyalty event.
Points	Number of loyalty points accrued by participating in this event.
Card # / Card	The card number identifying the loyalty member.
Card Type	The card type of the loyalty member.
Loyalty Group	The loyalty groups that were eligible to participate in the event.
Site	The site the event occurred at.
Date	The date the event occurred.

Field	Description
Time	The time the event occurred.

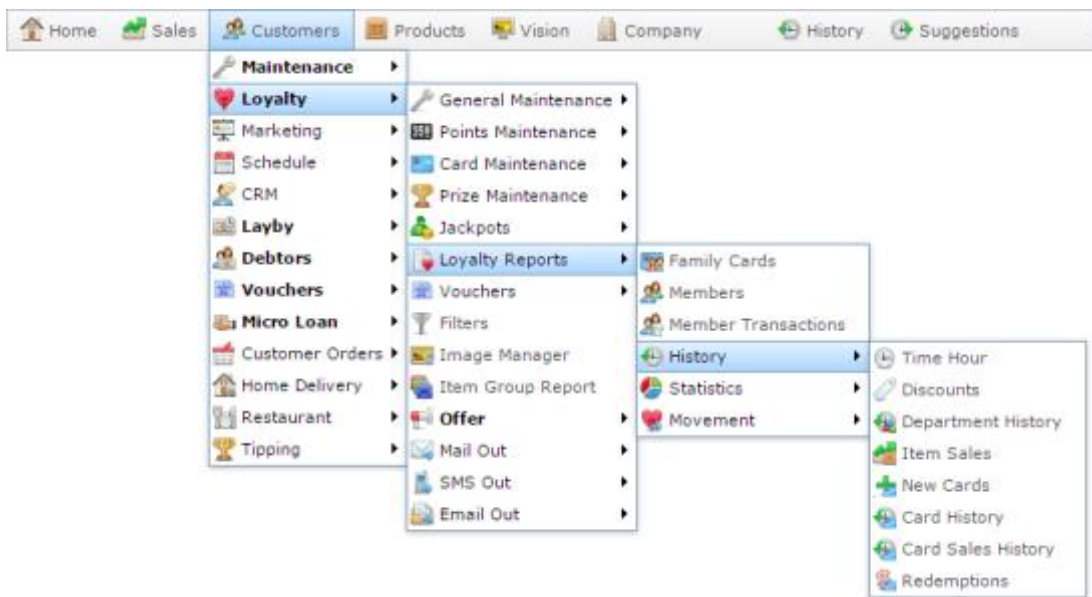
Card Sales report

Use the Card Sales report to view a summary of the sales by loyalty members ranked from highest sales down to lowest.

Opening the Card Sales report

To open the Card Sales report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > History > Card Sales History**.



The Card Sales report is displayed.

Card Sales Report - Top 10 Card (Sales) For Dates Between Wed 30 Nov 2011 and Mon 07 Dec 2015

Card	Sales	Points	Bonus	Discount	Transactions
Card New	\$35.96			\$0.00	
Smith Brian	\$65.65			\$0.00	
Top 10 Total:	\$101.61			\$0.00	
Total:	\$101.61			\$0.00	

⋮

States
All >

Site
All >

Report Type
Card >

By
Range >

Date From
30/11/2011

Date
7/12/2015

Type
Sales >

Card Type
All >

Card Group
All >

Display
Top 10 >

Item Group
All >

Brand
All >

Department
All >

Add to Favourites

Card Sales report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week, month or a period specified between two dates. <div style="border: 1px solid #0056b3; background-color: #e6f2ff; padding: 5px; margin-top: 10px;">Note: Additional fields are displayed to select the specific date period if Between Dates or Date Range is selected.</div>
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
States	Select a state or county to filter the report by.
Department	Select to filter the report by department.
Card Group	Select the loyalty card group to filter the report to.

Field	Description
Item Group	Select the loyalty item group to filter the report to.
Report Type	Select to aggregate the card sales by: <ul style="list-style-type: none"> ▪ Loyalty Card. ▪ Loyalty Card Type. ▪ Site. ▪ State.
Type	Select to report on only sales, or all transactions.
Brand / Group Ident	Filter the report to the selected brand.
Display	Select the number of records to display.
Card Type	Select to filter the report by loyalty card type.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.


Field	Description
Name / Card / Customer	Name of the loyalty member or customer.
Sales	The total sales to this loyalty member during this period.
Points	The total loyalty points earned by this loyalty member during this period.
Bonus	The total loyalty bonus points earned by this loyalty member during this period.
Discount	The total discounts accrued by this loyalty member during this period.
Transactions	The total number of transactions for this loyalty member for this period.

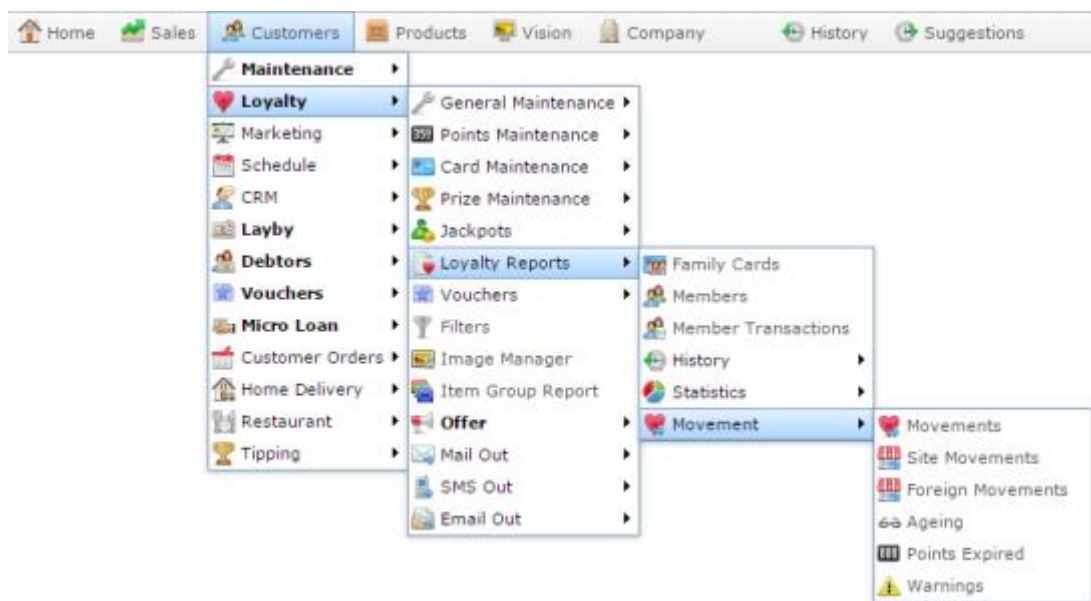
Foreign Loyalty Movement report

Use the Foreign Loyalty Movement report to view the sales, points accrual and redemption involving external companies or systems for each site for a given period.

Opening the Foreign Loyalty Movement report

To open the Foreign Loyalty Movement report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > Movement > Foreign Movements** .



The Foreign Loyalty Movement report is displayed.

Foreign Loyalty Movement - From 2000-11-2
To 2015-12-07

Site	Local Member Foreign Awarded	Local Member Foreign Redeem	Foreign Member Local Awarded	Foreign Member Local Redeem	Movement
Whats Up	65.7	0.0			65.7
Chadstone			101.6	0.0	-101.6
FLC	36.0	0.0			36.0
	101.6	0.0	101.6	0.0	0.0

Site:

Date From:

Date To:

Foreign Loyalty Movement report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / Description	The name of the relevant site.
Local Member Foreign Awarded	The total points accrued by local members from foreign entities.
Local Member Foreign Redeem	The total points redeemed by local members at foreign entities.
Foreign Member Local Awarded	The total points accrued by foreign members at your company.
Foreign Member Local Redeem	The total points redeemed by foreign members at your company.
Movement	The total movement of points.

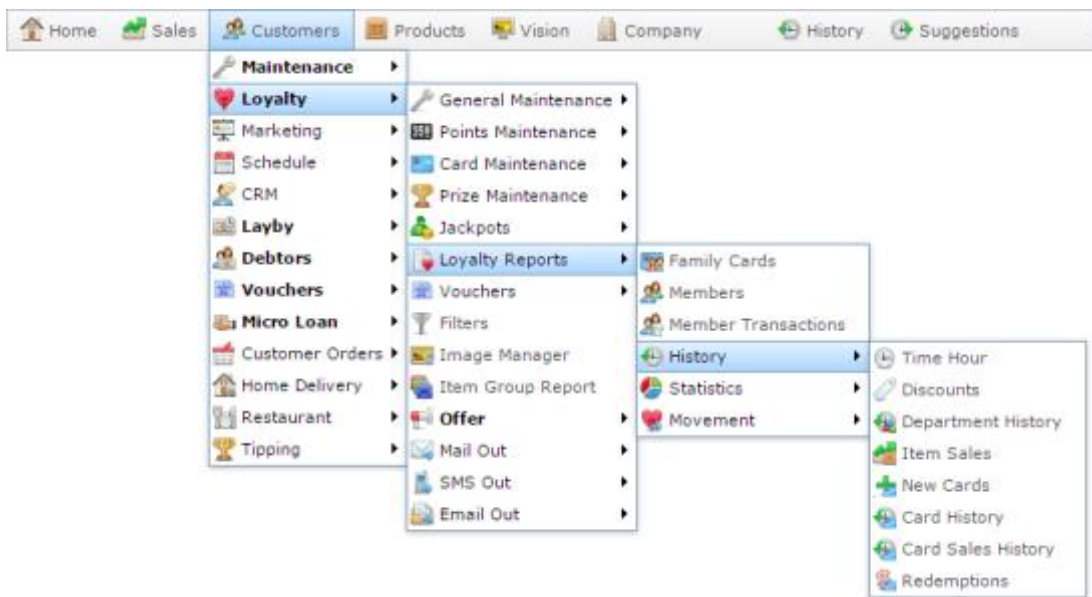
Frequent Shopper Cards report

Use the Frequent Shopper Cards report to view a summary of the sales per loyalty card for a given period.

Opening the Frequent Shopper Cards report

To open the Frequent Shopper Cards report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > History > Card History**.



The Frequent Shopper Cards report is displayed.

Frequent Shopper Cards - Top 10 Cards By Sales

Card	Year End 31-Dec- 2009	Year End 31-Dec- 2010	Year End 31-Dec- 2011	Year End 31-Dec- 2012	Year End 31-Dec- 2013	Year End 31-Dec- 2014	Year End 31-Dec- 2015	Total
<u>New</u>					\$131.30			\$131.30
<u>Card New</u>				\$0.00		\$35.96		\$35.96
Top 10				\$0.00	\$131.30	\$35.96		\$167.26
Total:				\$0.00	\$131.30	\$35.96		\$167.26

Site
All >

By
Year >

Date
7/12/2015

Type
Sales >

Display
Top 10 >

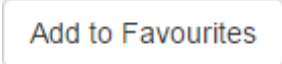
Card Type
All >

Add to Favourites

Frequent Shopper Cards report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week or month.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.

Field	Description
Type	Select the frequent shopper transactions to report on:
Sales	Total sales for each frequent shopper customer for the period.
Sales %	Percentage of sales total for each frequent shopper customer for the period.
Points	Total points accrued for each frequent shopper customer for the period.
Points %	Percentage of all points accrued for each frequent shopper customer for the period.
Redeem	Total dollar amount redeemed for each frequent shopper customer for the period.
Redeem %	Percentage of all dollar amount redeemed for each frequent shopper customer for the period.
Redeem Points	Total points redeemed for each frequent shopper customer for the period.
Redeem Points %	Percentage of all points redeemed for each frequent shopper customer for the period.
Bonus	Bonus points accrued for each frequent shopper customer for the period.
Bonus %	Percentage of all bonus points accrued for each frequent shopper customer for the period.
Discount	Discounts received for each frequent shopper customer for the period.

Field	Description
Display	Select the number of records to display.
Card Type	Select to filter the report by loyalty card type.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name / Card / Customer	Name of the loyalty member or customer.
Day / Week / Month / Year end	Display the summary total for the selected period.


Note: The information displayed depends on the report filters selected.

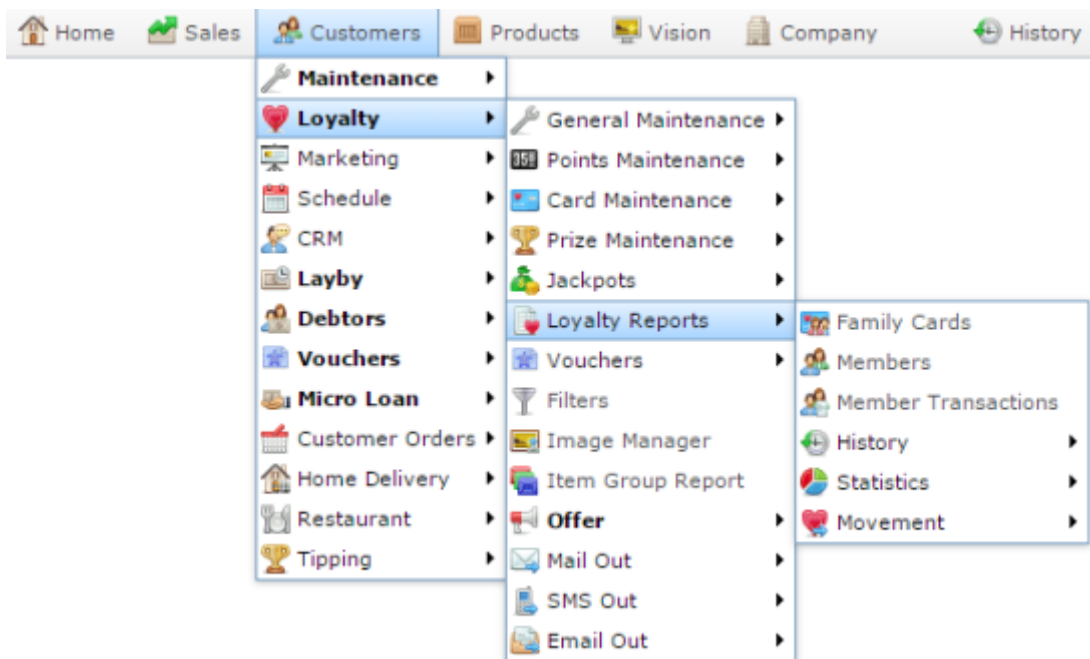
Frequent Shopper Member report

Use the Frequent Shopper Member report to view a summary of activity by frequent shopper members.

Opening the Frequent Shopper Member report

To open the Frequent Shopper Member report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > Members**.



The Frequent Shopper Member report is displayed.

Frequent Shopper Member Report

Referral	Customers	Points Earned	Points Redeemed	Sales to Date	Points Balance
No Referral	5,597	559,461.336	280,504.5	\$839,303.86	275,353.22
Bob	1	2,791.982	10	\$576.94	2,778.024
Total	5,598	562,253.318	280,514.5	\$839,880.80	278,131.244

By:

Referral:

Card Type:

Frequent Shopper Member report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; display: inline-block;">Add to Favourites</div>	Press to add this report to your Portal favourites for easier access.
By	Select to filter the report by:
Totals Only	Total sales.
Non Zero Balance	Balances that are not zero.
Valid Email Address	Frequent shoppers with valid email addresses.
Valid Mobile	Frequent shoppers with a valid mobile number.
New Cards	New frequent shopper cards.
All	All frequent shopper transactions.
Referral	Select the staff member who referred the frequent shopper member.
Card Type	Select to filter the report by loyalty card type.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name / Card / Customer	Name of the loyalty member or customer.
Card # / Card	The card number identifying the loyalty member.
Phone	The loyalty member's landline phone number.
Mobile	The loyalty member's mobile phone number.
Email	The loyalty member's email address.
Referral	The staff member who referred the loyalty member.

Note: This field is only displayed if **Totals Only** is selected.

Field	Description
Customers	The number of customers referred by this staff member. Note: This field is only displayed if Totals Only is selected.
Post Code	The loyalty member's post code.
Last Sale	The amount of the loyalty member's last sale.
Points Earned	The total number of points earned by this loyalty member, or all loyalty members referred by this staff member if Totals Only is selected in the filter area.
Points Redeemed	The total number of points redeemed by this loyalty member, or all loyalty members referred by this staff member if Totals Only is selected in the filter area.
Sales to Date	The total number of sales made by this loyalty member, or all loyalty members referred by this staff member if Totals Only is selected in the filter area.


Field	Description
Points Balance	The total points balance of this loyalty member, or all loyalty members referred by this staff member if Totals Only is selected in the filter area.

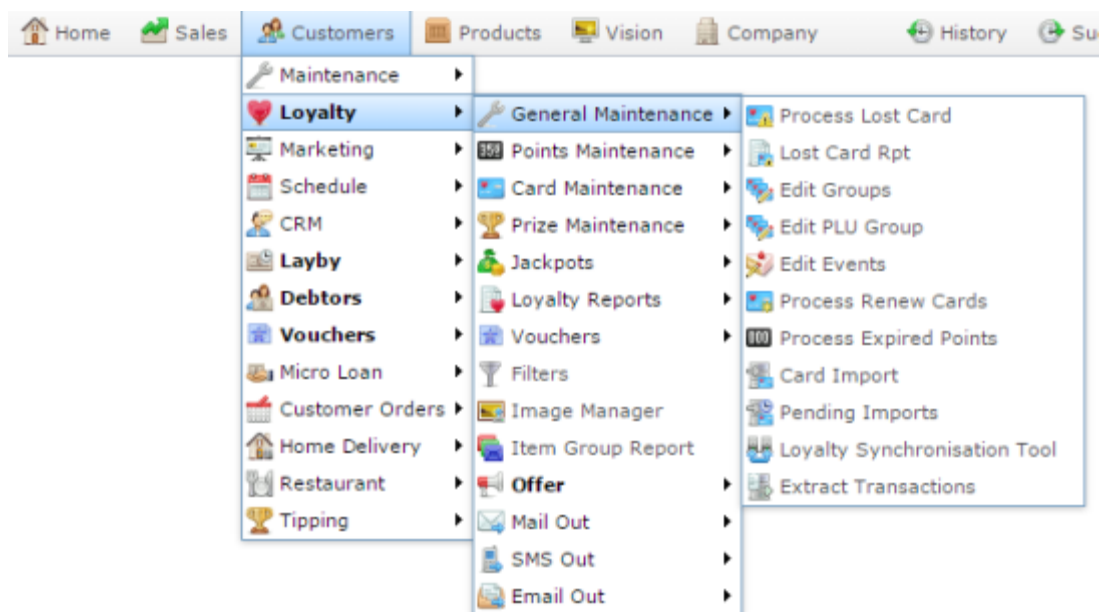
Lost Cards report

Use the Lost Cards report to view lost loyalty member cards that have been replaced.

Opening the Lost Cards report

To open the Lost Cards report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Lost Card Rpt.**



The Lost Cards report is displayed.

Loyalty Lost Cards

Name	Old Card	New Card	Swap Date	Processed	Process Date
Jeffries, Tom	:1010400008?	101040008	01-Apr-2014	No	
Bird, BOB	2100000000666	2100000000667	30-Oct-2014	Yes	21-Oct-2015

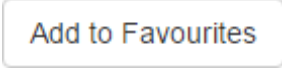
Date From:

Date To:

Lost Cards report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name / Card / Customer	Name of the loyalty member or customer.
Old Card	The card number of the lost loyalty card.
New Card	The card number of the replacement loyalty card.
Swap Date	The date the new card replaced the old card.
Processed	Whether or not the replacement has been processed.

Note: Replacement card numbers may be added via the Point of Sale or the Loyalty Maintenance, but loyalty points and transaction histories are not transferred until the card is processed.


Field	Description
Process Date	The date the card replacement was processed.

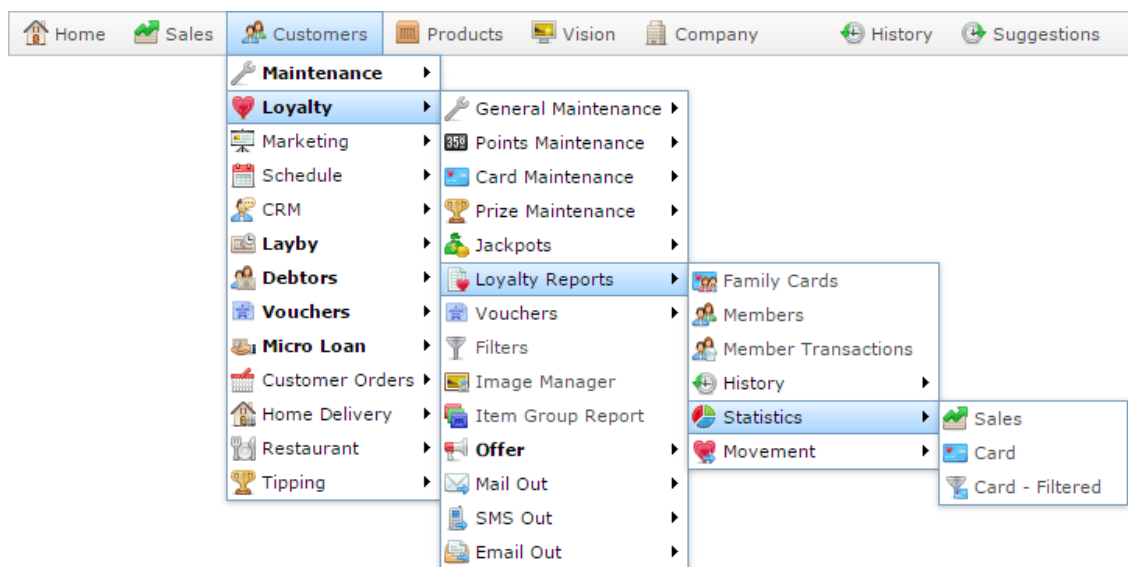
Loyalty Customers report

Use the Loyalty Customers report to view an aggregated report of loyalty members' activity according to specified filters.

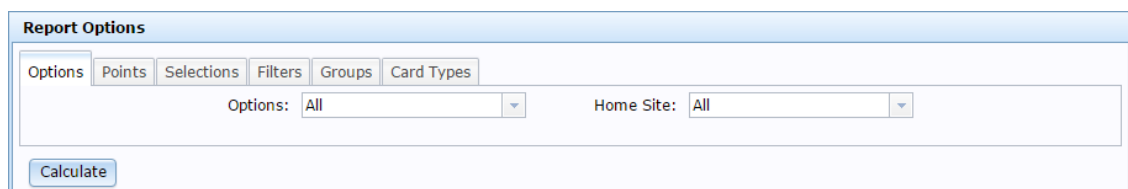
Opening the Loyalty Customers report

To open the Loyalty Customers report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > Statistics > Card - Filtered**.



The Report Options screen is displayed.






3. Select the filters you want to apply to restrict which loyalty customers are included in the report.

See *Report Options screen* on page 453.

4. Press .

The Loyalty Customers report is displayed.

Loyalty Customers Report

Loyalty Customers Report				
Selection	Customers	Points	Value	Action
Card Data	4,205	207,244.2	\$8,289.77	  
Total	4,205	207,244.2	\$8,289.77	

Click On Icon to activate







Parameters	
Element	Selection
Home Site	All
Options	All
Expired	Ignore
Points	Ignore
Points Balance	Any

Back

Loyalty Customers report key fields

Loyalty Customers Report

This grid displays the report results, when filtered through your selected report options.

Field	Description
Selection	The report information in the detailed report.
Customers	The number of customers the report covers.
Points	The total number of loyalty points the report covers.
Value	The dollar value of the loyalty points total.
Action	<p>Press an icon to perform an action on this report:</p> <ul style="list-style-type: none">  Download this report.  Display the details of this report.  Print labels from this report.  Send marketing material to these customers now.  Send marketing material to these customers later.  Export these customers to import into MailChimp. <div style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 10px; margin-top: 10px;"> <p>Note: This option is only displayed if MailChimp is configured for your company.</p> </div>

Managing filters and reports

Parameters


This grid displays the parameters you selected in the Report Options screen before calculating the report. See *Report Options screen* on page 453

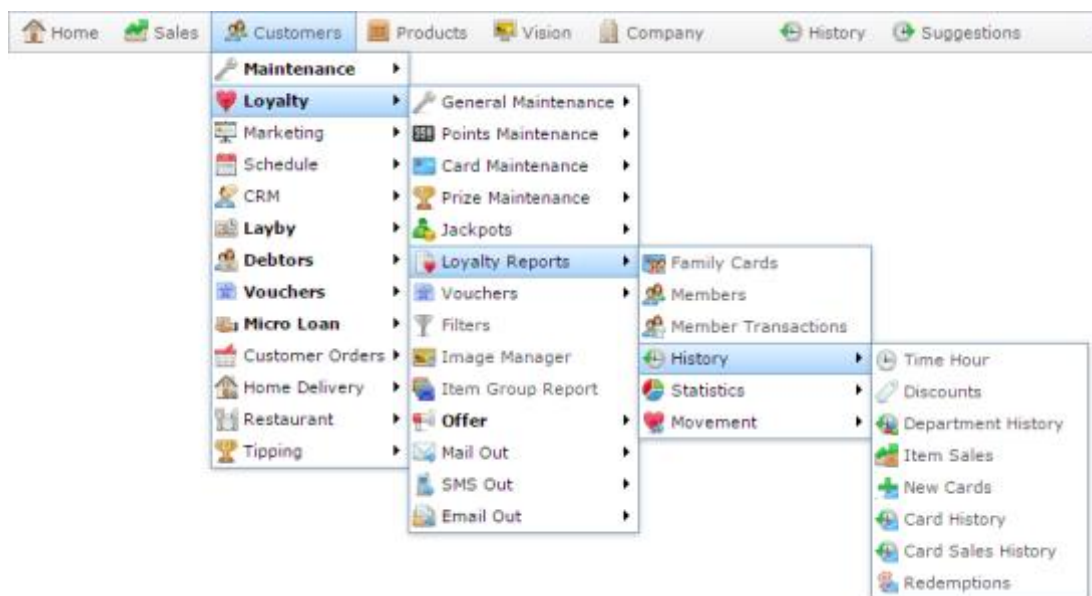
Loyalty Department report

Use the Loyalty Department report to view a summary of loyalty transactions by department for the specified period.

Opening the Loyalty Department report

To open the Loyalty Department report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > History > Department History**.



The Loyalty Department report is displayed.

Loyalty Department - by Sales: Chadstone

Department	Year End 31-Dec-2008	Year End 31-Dec-2009	Year End 31-Dec-2010	Year End 31-Dec-2011	Year End 31-Dec-2012	Year End 31-Dec-2013	Year End 31-Dec-2014	Total
Deli						\$59.68	\$35.96	\$95.64
Undefined						\$0.00		\$0.00
Total:						\$59.68	\$35.96	\$95.64

States
VIC

Site
Chadstone

By
Year

Date
1/12/2014

Type
Sales

Add to Favourites

Loyalty Department report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week, month or year.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
States	Select a state or county to filter the report by.

Field	Description
Type	Select to report:
Sales	Total sales figures per department for the selected period.
Sales Ex	Total sales figures excluding tax per department for the selected period.
Sales %	Percentage of sales per department for the selected period.
Quantity	Quantity of units sold per department for the selected period.
Quantity %	Percentage of units sold per department for the selected period.
\$ / Unit	Dollars earned per units sold per department for the selected period.
Points	Loyalty points accrued per department for the selected period.
Points %	Percentage of loyalty points accrued per department for the selected period.
Redeem	Dollars-worth of loyalty points redeemed per department for the selected period.

Field	Description
Redeem %	Percentage of dollars worth of loyalty points redeemed per department for the selected period.
Redeem Points	Total loyalty points redeemed per department for the selected period.
Redeem Points %	Percentage of loyalty points redeemed per department for the selected period.
Bonus	Total loyalty bonus accrued per department for the selected period.
Bonus %	Percentage of loyalty bonuses accrued per department for the selected period.
Discount	Total discounts applied per department for the selected period.
Discount %	Percentage of discounts applied per department for the selected period.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description / Department Description	Description of the department.
Day / Week / Month / Year end	Display the summary total for the selected period.


Note: The information displayed depends on the report filters selected.

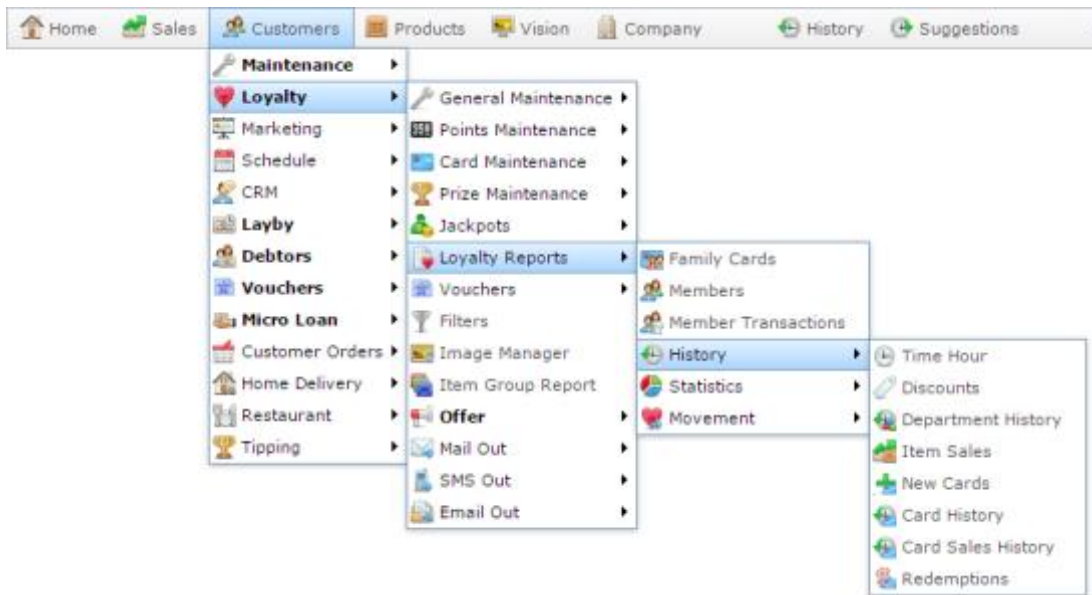
Loyalty Discounts report

Use the Loyalty Discounts report to view a summary of discounts provided to loyalty members over time.

Opening the Loyalty Discounts report

To open the Loyalty Discounts report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > History > Discounts**.



The Loyalty Discounts report is displayed.

Loyalty Discounts Report For '01 Dec 2014' Filtered by Supplier and Brand

Site	Discount	Total	%
Total			0.00%

Site

Chadstone >

Filtered By

Supplier and Brand >

Brand

All >

Supplier

All >

Date

1/12/2014

By

Day >

Add to Favourites

Loyalty Discounts report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week, month or a period specified between two dates. <div style="border: 1px solid #0056b3; background-color: #d9e1f2; padding: 5px; margin-top: 10px;">Note: Additional fields are displayed to select the specific date period if Between Dates or Date Range is selected.</div>
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
Supplier / Creditor	Select to restrict the report to a particular supplier, or to items where the supplier has not been selected.
Brand / Group Ident	Filter the report to the selected brand.

Field	Description
Filtering By	Select whether to filter the report on supplier, brand, both supplier and brand, or no filtering.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / Description	The name of the relevant site.
Discount	Total discounts provided to loyalty members at this site over the specified period.
Total	Total sales to loyalty members at this site over the specified period.
%	Percentage of the sales given as discounts to loyalty members at this site over the specified period.

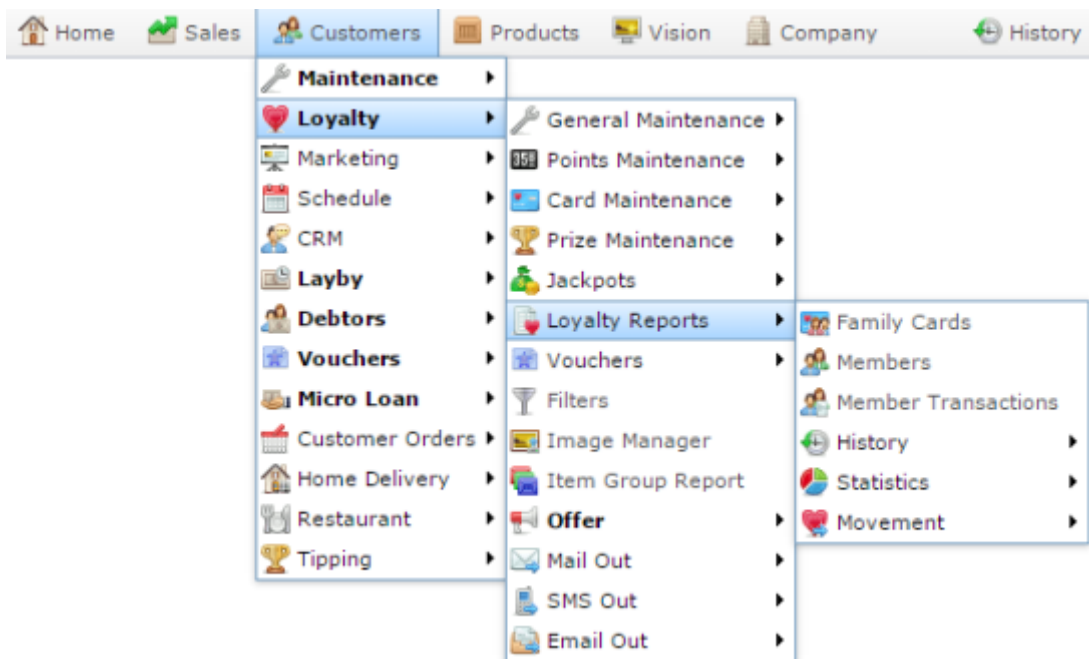
Loyalty Family Cards report

Use the Loyalty Family Cards report to view loyalty cards that are linked to family members.

Opening the Loyalty Family Cards report

To open the Loyalty Family Cards report:

1. Press  Customers from the menu bar.
2. Press **Loyalty > Loyalty Reports > Family Cards**.




The Loyalty Family Cards report is displayed.



Loyalty Family Cards report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Company	Select the company to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.


Field	Description
Name / Card / Customer	Name of the loyalty member or customer.
Master Card	The card number of the primary card representing that family.
Family Members	The names of the loyalty members in the family.

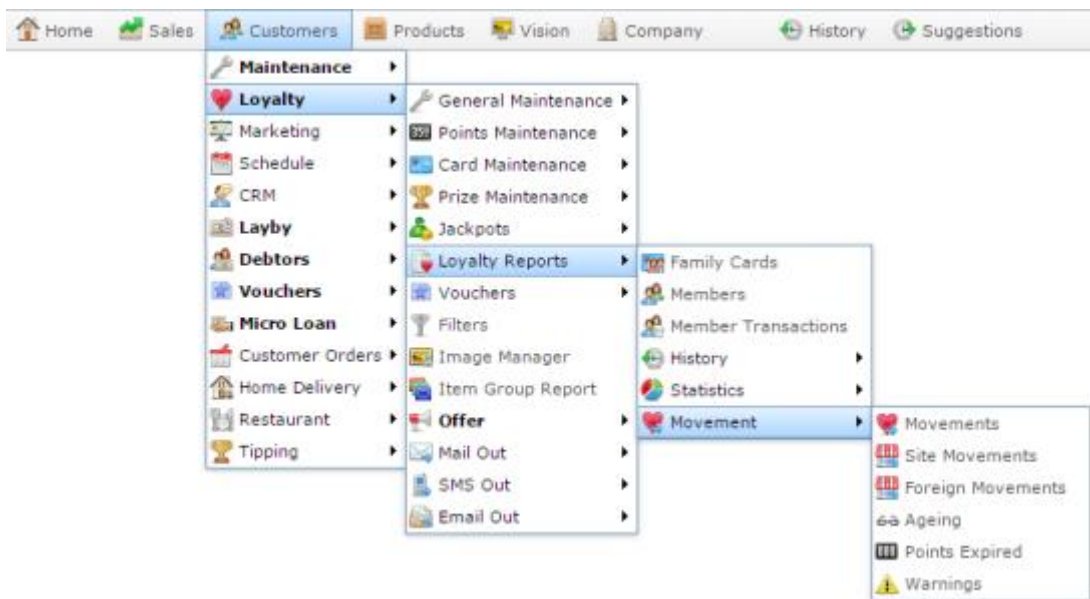
Loyalty Site Movement report

Use the Loyalty Site Movement report to compare the sales, visits, points accrual and redemptions by loyalty members between sites for a given period.

Opening the Loyalty Site Movement report

To open the Loyalty Site Movement report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > Movement > Site Movements** .



The Loyalty Site Movement report is displayed.

Loyalty Site Movement - Balances As Of 2015-12-07

Site	Award Points	Redeem Points	Net Points	Value	Home Award Points	Home Redeem Points	Home Net Points	Home Value	Away Award Points	Away Redeem Points	Away Net Points	Away Value
Chadst	101.6	0.0	101.6	\$4.06					101.6	0.0	101.6	\$4.06
	101.6	0.0	101.6	\$4.06					101.6	0.0	101.6	\$4.06

Site
Chadstone

Card Type
All

Date
7/12/2015

Selection
Balance At Date

[Add to Favourites](#)

Loyalty Movement report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
Card Type	Select to filter the report by loyalty card type.
Selection	Select to display the balance: <ul style="list-style-type: none"> ▪ at a specified date ▪ over a specified date range ▪ at the current date.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / Description	The name of the relevant site.
Awarded Points	Total loyalty points awarded by the site during the selected date or period.
Redeem Points	Total loyalty points redeemed at the site during the selected date or period.
Net Points	Total loyalty points awarded, less total redeemed points, at the site during the selected date or period.
Value	Dollar value of the net points.
Home Awarded Points	Total loyalty points awarded by the site to loyalty members whose home site is this site during the selected date or period.

Field	Description
Home Redeemed Points	Total loyalty points redeemed at the site by loyalty members whose home site is this site during the selected date or period.
Home Net Points	Total loyalty points awarded, less total redeemed points, by loyalty members whose home site is this site at the site during the selected date or period.
Home Value	Dollar value of the net points moved by loyalty members whose home site is this site.
Away Awarded Points	Total loyalty points awarded by the site to loyalty members whose home site is not this site during the selected date or period.
Away Redeemed Points	Total loyalty points redeemed at the site by loyalty members whose home site is not this site during the selected date or period.
Away Net Points	Total loyalty points awarded, less total redeemed points, by loyalty members whose home site is not this site at the site during the selected date or period.
Away Value	Dollar value of the net points moved by loyalty members whose home site is not this site.

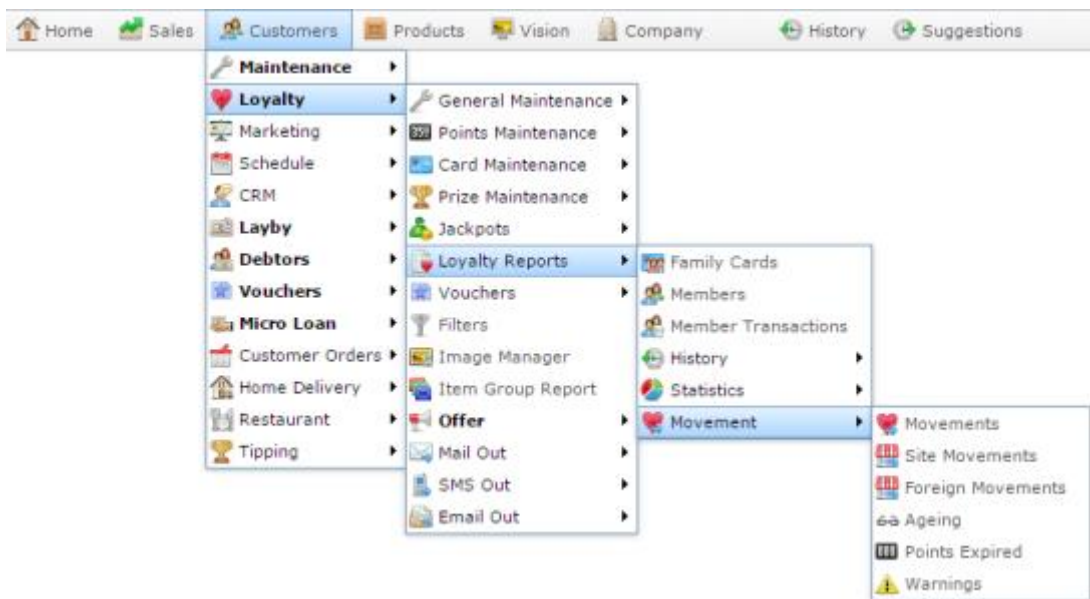
Loyalty Movement report

Use the Loyalty Movement report to view the sales, visits, points accrual and redemptions by loyalty members for each site for a given period.

Opening the Loyalty Movement report

To open the Loyalty Movement report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > Movement > Movements** .



The Loyalty Movement report is displayed.

Loyalty Movements - For Dates Between 2000-11-07 and 2015-12-07

Date	Custom	Visits	Avg Visits	Sales	Avg Sales	Points	Bonus	Discoun	\$ Redeem	Points
2015-12-07	2	4	1.33	\$101.61	\$25.40	101.61	0	\$0.00	\$0.00	0
Total	2	4	2.00	\$101.61	\$25.40	101.61	0	\$0.00	\$0.00	0

↗
⋮

Site

Chadstone ➤

Card Type

All ➤

Date From

7/11/2000

Date

7/12/2015

By

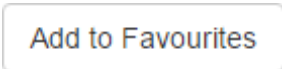
Between Dates ➤

Add to Favourites

Loyalty Movement report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week, month or a period specified between two dates. <div data-bbox="662 1120 1393 1285" style="border: 1px solid #0056b3; background-color: #e6f2ff; padding: 5px;">Note: Additional fields are displayed to select the specific date period if Between Dates or Date Range is selected.</div>
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
Card Type	Select to filter the report by loyalty card type.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Date	Date of the loyalty transaction.
Customers	Number of loyalty customers received on that date.
Transactions	Number of loyalty transactions on that date.
Avg Transactions	Average number of transactions per customer.
Sales	Total sales received from loyalty customers on this date.
Avg Sales	Average transaction value.
Points	Total points accrued by loyalty members on this date.
Bonus	Total bonus loyalty points accrued by loyalty members on this date.

Field	Description
Discount	Total discounts received by loyalty members on this date.
\$ Redeem	Total dollars redeemed by loyalty members on this date.
Redeem Points	Total loyalty points redeemed by loyalty members on this date.

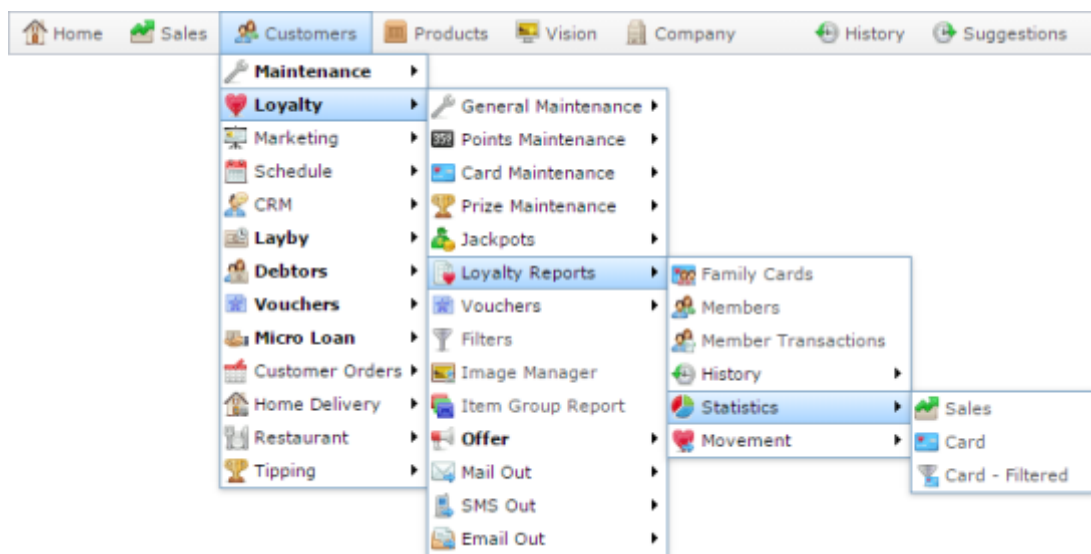
Loyalty Customer Purchases by Site report

Use the Loyalty Customer Purchases by Site report to view a summary of the sales by loyalty members for each site.

Opening the Loyalty Customer Purchases by Site report

To open the Loyalty Customer Purchases by Site report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > Statistics > Sales**.



The Loyalty Customer Purchases by Site report is displayed.

Loyalty Customer Purchases By Site (NET of Discounts)

Site	Month End	Month End	Month End	Month End	Month End	Month End	Month End	Total
	30-Jun-2015	31-Jul-2015	31-Aug-2015	30-Sep-2015	31-Oct-2015	30-Nov-2015	31-Dec-2015	
Chadstone								
Total Sales:								

States

Site

By

Type

Date

Display As

Add to Favourites

Loyalty Customer Purchases by Site report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; display: inline-block;">Add to Favourites</div>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week or month.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
States	Select a state or county to filter the report by.

Field	Description
Type	Select the information to report on:
Customer Counts	Display the number of customers for the period.
Customer \$ Purchase	Display the amount of customer spending for the period.
Average Customer \$ Purchase	Display the average customer purchase for the period.
Loyalty Customer Counts	Display the number of loyalty customers for the period.
Loyalty Purchases	Display the total dollar amount of loyalty purchases for the period.
Average Loyalty \$ Purchase	Display the average loyalty purchase amount for the period.
% Loyalty (Counts)	Display the percentage of loyalty customers amongst all sales.
% Loyalty (\$ Purchases)	Display the percentage of loyalty purchases amongst sales totals.
Account Customer Counts	Display the number of customers with customer accounts for the period.
Account Purchases	Display the purchase total made with customer accounts for the period.
Average Account \$ Purchase	AMC Convergent IT Portal Documentation Display the average purchase amount made with customer accounts for the period.

Field	Description
Display As	Select to display the information as a standard table, or in a graphical format such as a bar or pie chart.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / Description	The name of the relevant site.
Day / Week / Month / Year end	Display the summary total for the selected period.


Note: The information displayed depends on the report filters selected.

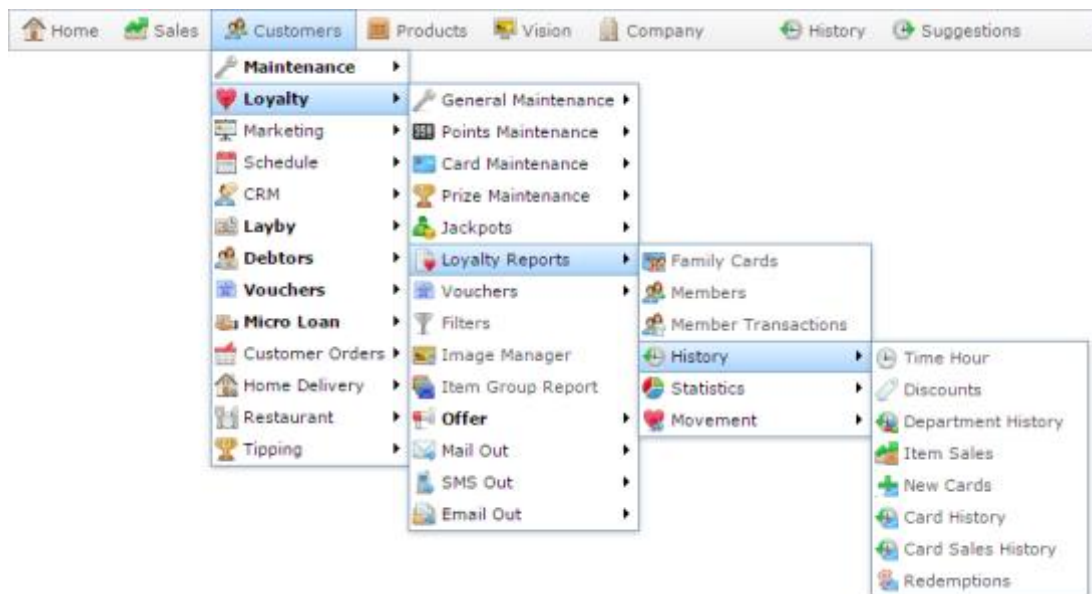
New Loyalty Cards report

Use the New Loyalty Cards report to view a list of new loyalty cards that have been added to the Portal during the specified period.

Opening the New Loyalty Cards report

To open the New Loyalty Cards report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > History > New Cards**.



The New Loyalty Cards report is displayed.

New Loyalty Cards - From 2011-11-17 To 2015-12-08

Site	Site #	New Cards
Chadstone	500	2
Total		2

Site
Chadstone

Date From
17/11/2011

Date To
8/12/2015

By
Date Range

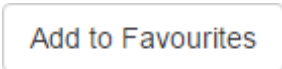
Card Type
All

Add to Favourites

New Loyalty Cards report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week, month or a period specified between two dates. <div data-bbox="662 1120 1391 1285" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;">Note: Additional fields are displayed to select the specific date period if Between Dates or Date Range is selected.</div>
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
Card Type	Select to filter the report by loyalty card type.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.


Field	Description
Site / Description	The name of the relevant site.
Site # / Site	The site code of the relevant site.
New Cards	Number of new cards created at this site during the selected period.

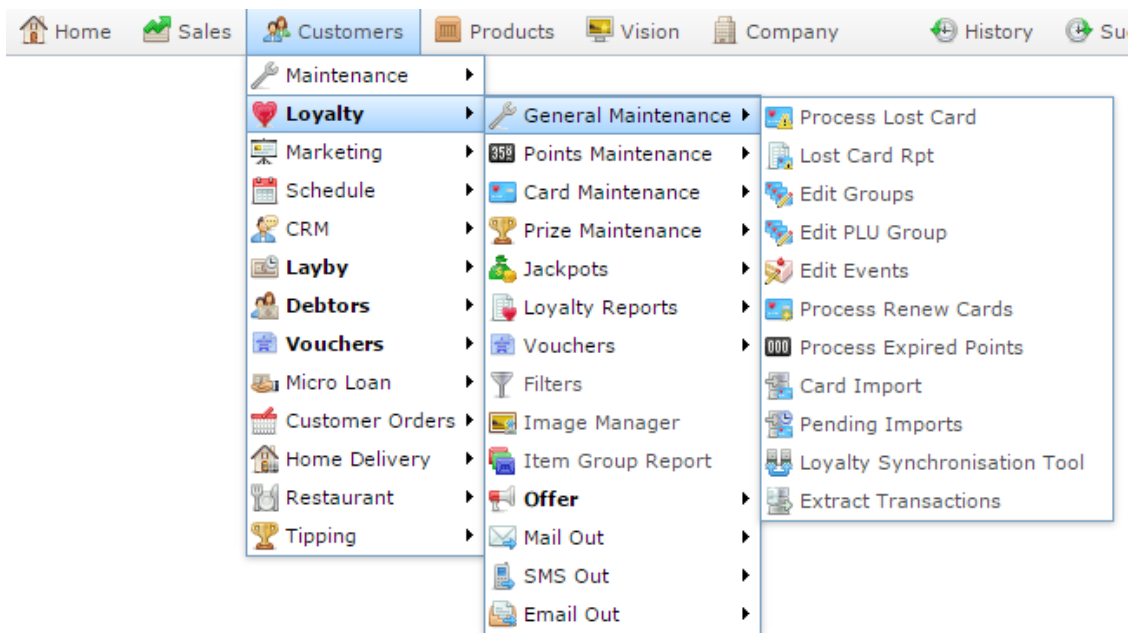
Pending Expired Points report

Use the Pending Expired Points report to process expired loyalty member points.


Opening the Pending Expired Points report


To open the Pending Expired Points report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Process Expired Points**.



The Pending Expired Points report is displayed.

Loyalty Update Maintenance - Process Expired Points 

[Add to Favourites](#) 

Company	Company #	Card Type	Description	Expiry Type	Expire By	Rollover Type	Last Process Date
DodoF-B	-1	0	Default	Date of Process	Older Than 2 Years	Two Stage	14/06/2013
DodoF-B	-1	1	Sporting Globe	Anniversary	Older Than 5 Years	Normal	14/06/2013
Total							

Pending Expired Points report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Company	The name of the relevant company.
Company #	The unique code identifying the company within the Portal.
Card Type	The type of card to be processed.
Description	The description of the card type.
Expiry Type	The type of points expiry this card type uses. See <i>Loyalty Card Type Maintenance screen</i> on page 162.
Expire By	The age of points to be expired.
Rollover Type	The type of points rollover system used by this card type. See <i>Loyalty Card Type Maintenance screen</i> on page 162.
Last Process Date	The date expired points were last processed for this card type.


Field	Description
Points per Renewal	The number of points deducted by a renewal for this card type. See <i>Loyalty Card Type Maintenance screen</i> on page 162.

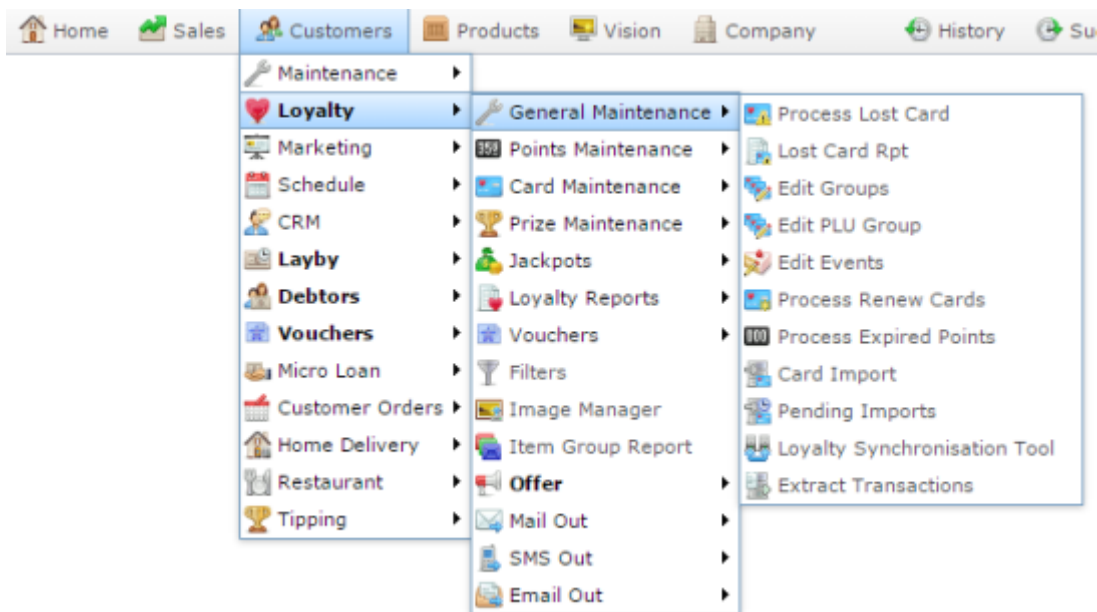
Pending Lost Cards report

Use the Pending Lost Cards report to replace lost loyalty member cards. Press the company you want to replace lost cards for in the report.

Opening the Pending Lost Cards report

To open the Pending Lost Cards report:

1. Press  Customers from the menu bar.
2. Press **Loyalty > General Maintenance > Process Lost Card**.



The Pending Lost Cards report is displayed.



Pending Lost Cards report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.


Field	Description
Company	The name of the relevant company.
Company #	The unique code identifying the company within the Portal.
Number of Records	The number of lost cards to process for this company.

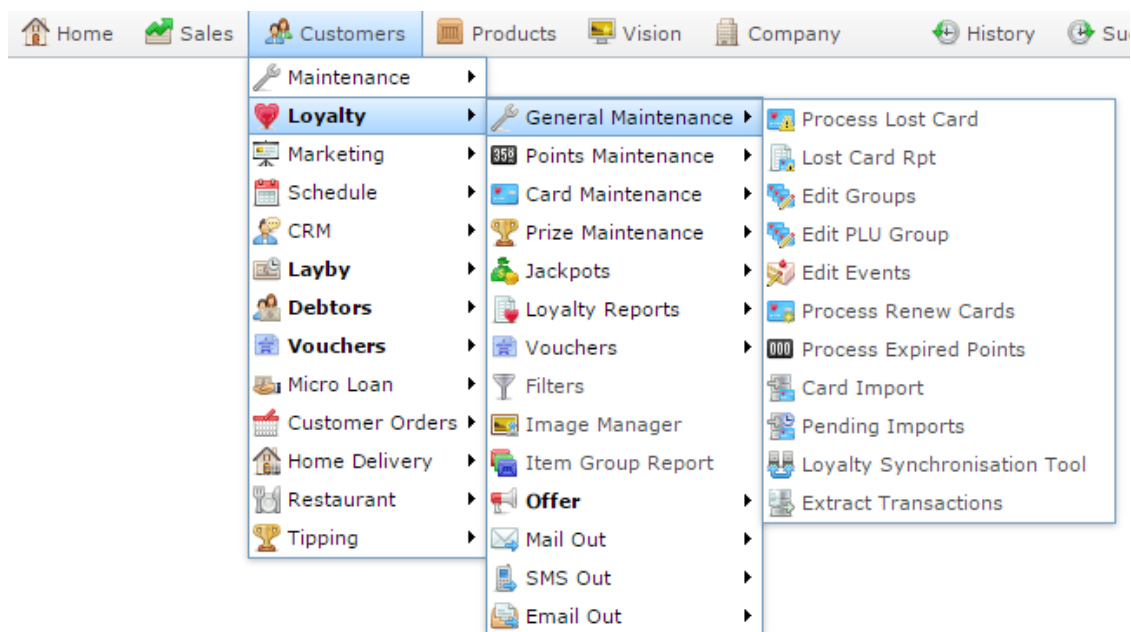
Process Renew Cards report

Use the Process Renew Cards report to renew loyalty member cards.

Opening the Process Renew Cards report

To open the Process Renew Cards report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Process Renew Cards**.



The Process Renew Cards report is displayed.

Loyalty Update Maintenance - Process Renew Cards

Add to Favourites

Company	Company #	Card Type	Description	Points per Renewal	Renewal Period	Last Renewal Date
DodoF-B	-1	0	Default	100	Years	2/09/2015
Total						

Managing filters and reports

Process Renew Cards report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Company	The name of the relevant company.
Company #	The unique code identifying the company within the Portal.
Card Type	The type of card to be processed.
Description	The description of the card type.
Expiry Type	The type of points expiry this card type uses. See <i>Loyalty Card Type Maintenance screen</i> on page 162.
Expire By	The age of points to be expired.
Rollover Type	The type of points rollover system used by this card type. See <i>Loyalty Card Type Maintenance screen</i> on page 162.
Last Process Date	The date expired points were last processed for this card type.

Field	Description
Points per Renewal	The number of points deducted by a renewal for this card type. See <i>Loyalty Card Type Maintenance screen</i> on page 162.

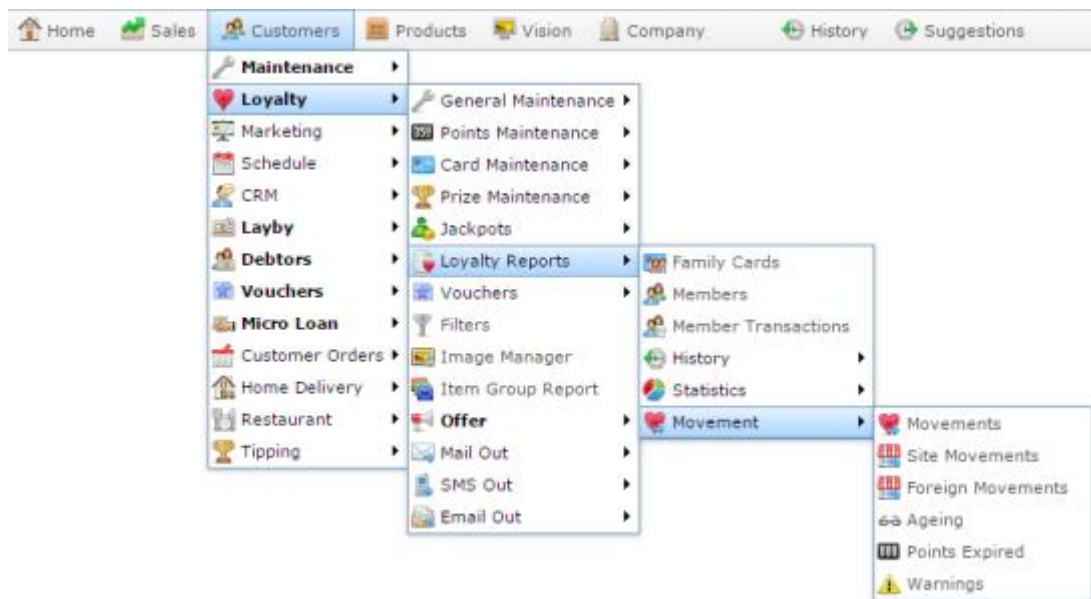
Points Ageing report

Use the Points Ageing report to view the distribution of points across your loyalty customers.

Opening the Points Ageing report

To open the Points Ageing report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > Movement > Ageing**.



The Points Ageing report is displayed.

Points Ageing Report as at the 08 Dec 2015



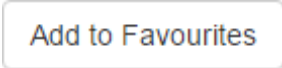
Add to Favourites

Points	Total Customers	Percentage Customers	Total Points	Percentage Points
Points > 1000	15	0.24%	245,468.2	92.79%
Points 901 to 1000	4	0.07%	3,731.0	1.41%
Points 801 to 900	6	0.10%	5,105.9	1.93%
Points 701 to 800	6	0.10%	4,513.9	1.71%
Points 601 to 700	14	0.23%	9,014.5	3.41%
Points 501 to 600	22	0.36%	11,890.2	4.49%
Points 401 to 500	27	0.44%	12,001.7	4.54%
Points 301 to 400	69	1.12%	23,880.2	9.03%
Points 201 to 300	143	2.33%	34,459.2	13.03%
Points 101 to 200	360	5.86%	50,770.9	19.19%
Points 51 to 100	481	7.83%	34,603.9	13.08%
Points 41 to 50	139	2.26%	6,178.8	2.34%
Points 31 to 40	189	3.08%	6,616.6	2.50%
Points 21 to 30	302	4.92%	7,507.7	2.84%
Points 11 to 20	397	6.46%	5,855.1	2.21%
Points 0 to 10	3,968	64.60%	-197,051.4	-74.49%
Total	6,142	100%	264,546.5	100%

Points Ageing report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.


Field	Description
Points	The bracket of points.
Total Customers	The number of customers with points in this bracket.
Percentage Customers	The percentage of customers who have points in this bracket.
Total Points	The total points of all customers whose balances are in this bracket.
Percentage Points	The percentage of the total points balance that these customers' combined balance represents.

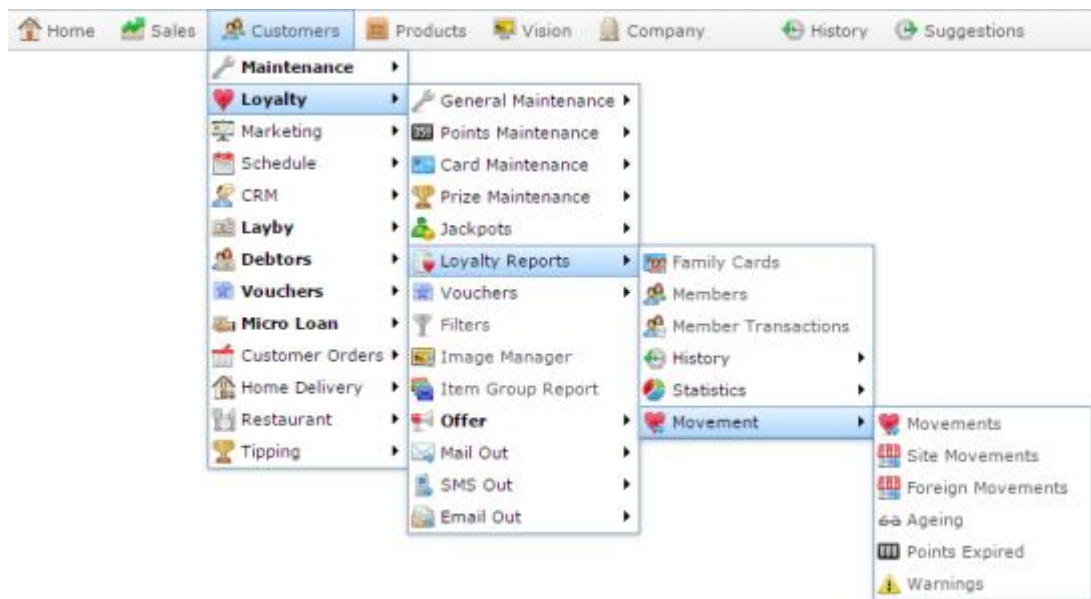
Points Expired By Site report

Use the Points Expired By Site report to view the number of expired points and customers with expired points for each site.

Opening the Points Expired By Site report

To open the Points Expired By Site report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > Movement > Points Expired**.



The Points Expired By Site report is displayed.

Points Expired by Site : From 23 Nov 2000 To 07 Dec 2015

Site	Number Of Customers	Points Expired
Total:	0	0.000

Site
Chadstone

By
Date Range

Date From
23/11/2000

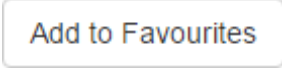
Date To
7/12/2015

Add to Favourites

Points Expired By Site report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week, month or a period specified between two dates. <div data-bbox="663 1122 1394 1285" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;">Note: Additional fields are displayed to select the specific date period if Between Dates or Date Range is selected.</div>
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / Description	The name of the relevant site.
Number of Customers	Number of customers with expired points at this site.
Points Expired	Total number of expired points at this site.

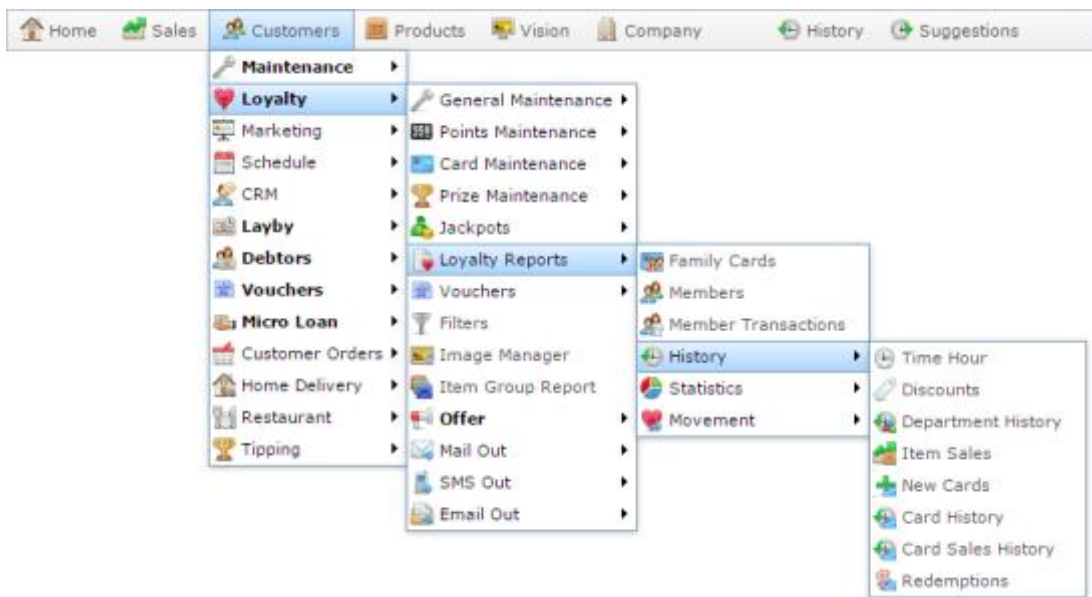
Redemption report

Use the Redemption report to view a summary of loyalty points redemptions during the specified period.

Opening the Redemption report

To open the Redemption report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > History > Redemptions**.



The Redemption report is displayed.

Redemption : Sites by Value

Site	Monday 07-Dec- 2015	Tuesday 08-Dec- 2015	Wednesd 09-Dec- 2015	Thursday 10-Dec- 2015	Friday 11-Dec- 2015	Saturday 12-Dec- 2015	Sunday 13-Dec- 2015	Total
Total:								\$0.00

By:

Date:

Display As:

Type:

Redemption report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; display: inline-block;">Add to Favourites</div>	Press to add this report to your Portal favourites for easier access.
By	Select to display the report for a specific day, day of the week, week, month or year.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
Type	Display the redemptions by their dollar value, or total number of redemptions.
Display As	Select to display the information as a standard table, or in a graphical format such as a bar or pie chart.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / Description	The name of the relevant site.
Day / Week / Month / Year end	Display the summary total for the selected period.


Note: The information displayed depends on the report filters selected.

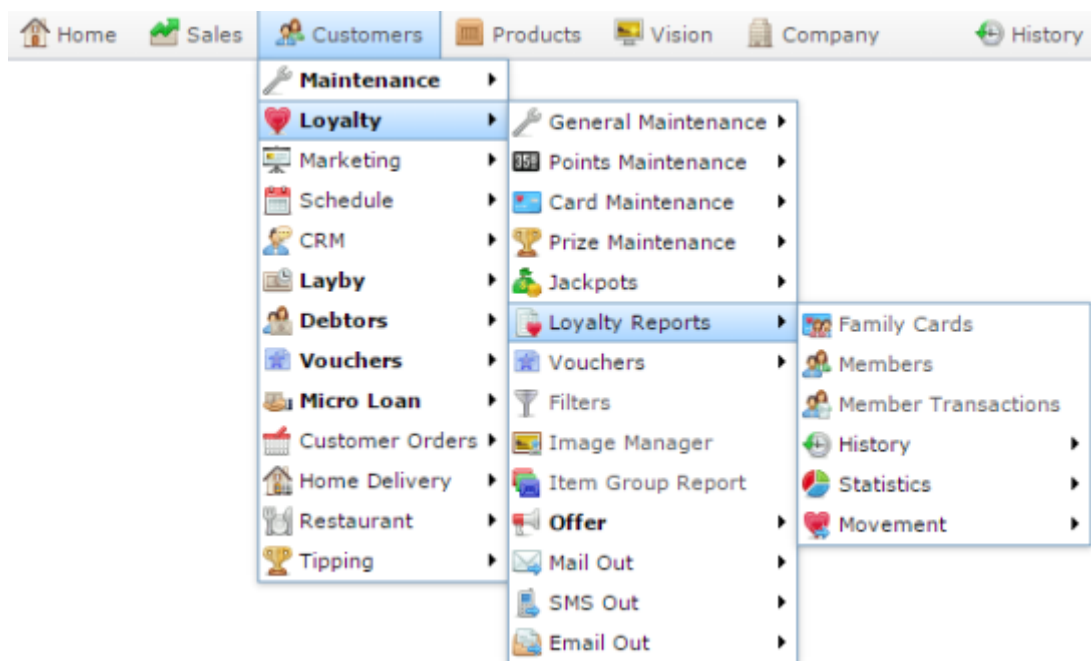
Top 10 Loyalty Member report

Use the Top 10 Loyalty Member report to view a transaction summary of your most active loyalty members.

Opening the Top 10 Loyalty Member report

To open the Top 10 Loyalty Member report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > Member Transactions**.



The Top 10 Loyalty Member report is displayed.

Managing filters and reports

Top 10 Loyalty Member Report - Sales

Customer	Monday 01-Dec- 2014	Tuesday 02-Dec- 2014	Wednesd 03-Dec- 2014	Thursday 04-Dec- 2014	Friday 05-Dec- 2014	Saturday 06-Dec- 2014	Sunday 07-Dec- 2014	Total
Total:								

Site
Chadstone >

Date
1/12/2014

Type
Sales >

Report Type
Detail >

Display
Top 10 >

Card Type
All >

Add to Favourites

Top 10 Loyalty Member report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.

Field	Description
Type	Select the type of loyalty interaction to report on.
Sales	Report sales by loyalty members.
Points	Report points earned by loyalty members.
Bonus	Report bonuses earned by loyalty members.
Transactions	Report transactions by loyalty members.
Redemptions Only	Report transactions paid for with redeemed points.
Report Type	Select to display a detailed report, or a consolidated set of information.
Display	Select the number of records to display.
Card Type	Select to filter the report by loyalty card type.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name / Card / Customer	Name of the loyalty member or customer.
Day / Week / Month / Year end	Display the summary total for the selected period.

Note: The information displayed depends on the report filters selected.

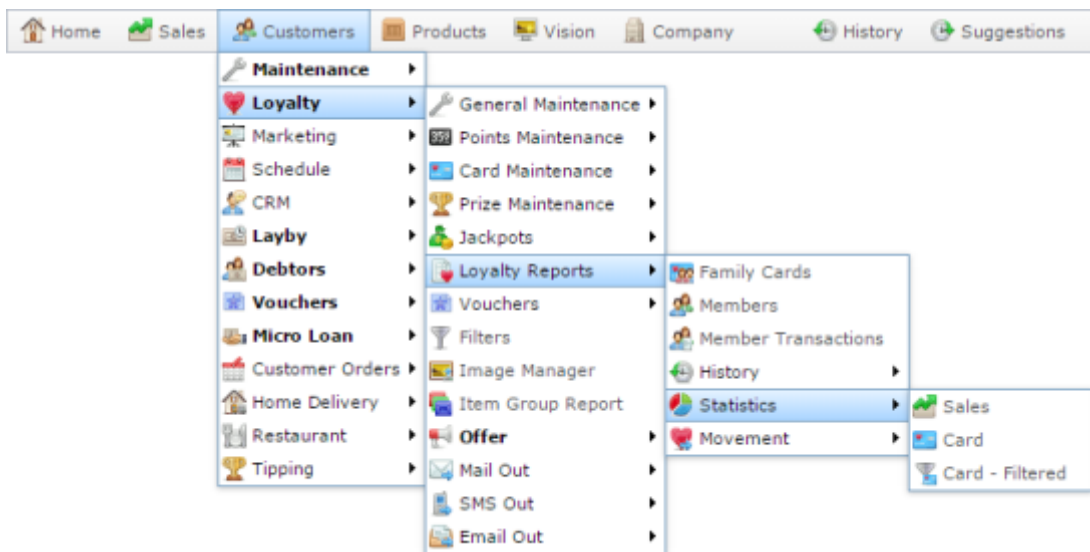
Top 10 Loyalty Members - Details report

Use the Top 10 Loyalty Members - Details report to view the summarised details of loyalty members' activity, ranked from most active to least active.

Opening the Top 10 Loyalty Members - Details report

To open the Top 10 Loyalty Members - Details report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > Statistics > Card**.



The Top 10 Loyalty Members - Details report is displayed.

Top 10 Loyalty Member Report - For Dates Between Sun 07 Nov 2010 and Mon 07 Dec 2015 - Sales : Chadstone

Custom	Card Number	Post Code	Sales	Average	Points	Bonus	Discoun	Redeem	Redemp	Visits
Card	2100995		\$35.96	\$11.99	36	0	\$0.00	0	\$0.00	3
Smith	2730000	3169	\$65.65	\$65.65	66	0	\$0.00	0	\$0.00	1
Top 10 Total:			\$101.61	\$25.40	102	0	\$0.00	0	\$0.00	4
Total:			\$101.61	\$25.40	102	0	\$0.00	0	\$0.00	4

Site
Chadstone >

By
Between Dates >

Date From
7/11/2010

Date
7/12/2015

Type
Sales >

Card Type
All >

Display
Top 10 >

Add to Favourites

Top 10 Loyalty Members - Details report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week, month or a period specified between two dates. <div data-bbox="662 1122 1391 1285" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;">Note: Additional fields are displayed to select the specific date period if Between Dates or Date Range is selected.</div>
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.

Field	Description
Type	Select the information to display:
Sales	Display the sales of loyalty members.
Redemptions	Display the redemptions of loyalty members.
Visits	Display the visits of loyalty members.
Post Codes	Display the transactions aggregated by post code.
Age	Display the transactions aggregated by age bracket.
Age and Gender	Display the transactions aggregated by age bracket and gender.
Profession	Display the transactions aggregated by profession.
Home Site	Display the transactions aggregated by the loyalty customer's Home Site.
Staff Member	Display the transactions aggregated by the staff member who performed them.
\$ Spend	Display the transactions aggregated by bracket of dollars spent.
Average \$ Spend	Display the transactions aggregated by bracket of average dollars spent over the period.

Field	Description
Display	Select the number of records to display.
Card Type	Select to filter the report by loyalty card type.

Report area

This area displays report information.



Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name / Card / Customer	Name of the loyalty member or customer.
Card # / Card	The card number identifying the loyalty member.
Sales	The total sales to this loyalty member during this period.
Average / Average Spend	Average sales of the loyalty member during this period.
Points	The total loyalty points earned by this loyalty member during this period.
Bonus	The total loyalty bonus points earned by this loyalty member during this period.

Field	Description
Discount	The total discounts accrued by this loyalty member during this period.
Redeemed Points	Total loyalty points redeemed by this loyalty member during this period.
Redemption	Total dollar value of points redeemed by this loyalty member during this period.
Average Transactions	Average transaction total for the bracket. <div data-bbox="914 1048 1391 1216">Note: This field is only displayed for certain filter selections.</div>
% of Cards	Percentage of all loyalty cards that fall into this bracket. <div data-bbox="914 1379 1391 1547">Note: This field is only displayed for certain filter selections.</div>
Transactions	The total number of transactions for this loyalty member for this period.
Post Code	The loyalty member's post code.


Loyalty Transaction Extraction report

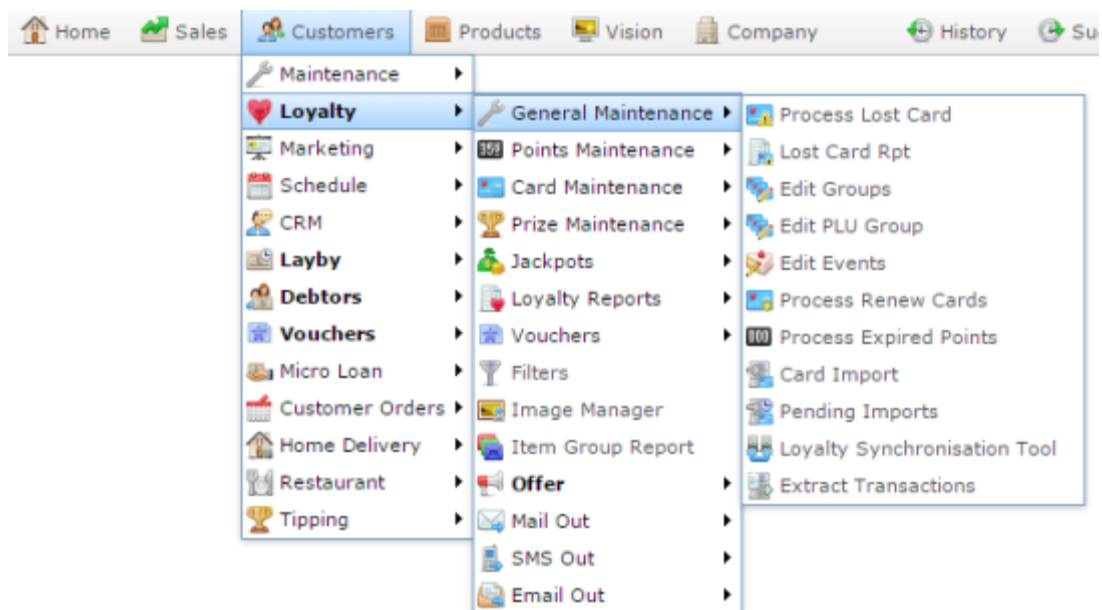
Use the Loyalty Transaction Extraction report to view all the loyalty transactions for a specified date period.

Tip: To print the report, press  in the menu bar at the top of the screen. To download a copy of the report to your computer, press  in the menu bar at the top of the screen.

Opening the Loyalty Transaction Extraction report

To open the Loyalty Transaction Extraction report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > General Maintenance > Extract Transactions**.



The Loyalty Transaction Extraction report is displayed.

Managing filters and reports

Loyalty Transaction Report / Extraction

Site Name	Site	Transactions	Points	Sales
Chadstone	500	4	102	\$101.61
Total		4	102	\$101.61

Company
Example Company >

Selection
All Transactions >

Date From
1/10/2013

Date To
12/11/2015

Add to Favourites

Loyalty Transaction Extraction report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Company	Select the company to report on.
Selection	Select to display either: <ol style="list-style-type: none"> 1. All transactions relating to loyalty members. 2. Only sales by loyalty members.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / Description	The name of the relevant site.
Site # / Site	The site code of the relevant site.
Transactions	The number of the selected transactions by loyalty members for this site.
Points	The number of points accrued by loyalty members at this site.
Sales	The dollar value of sales accrued by loyalty members at this site.

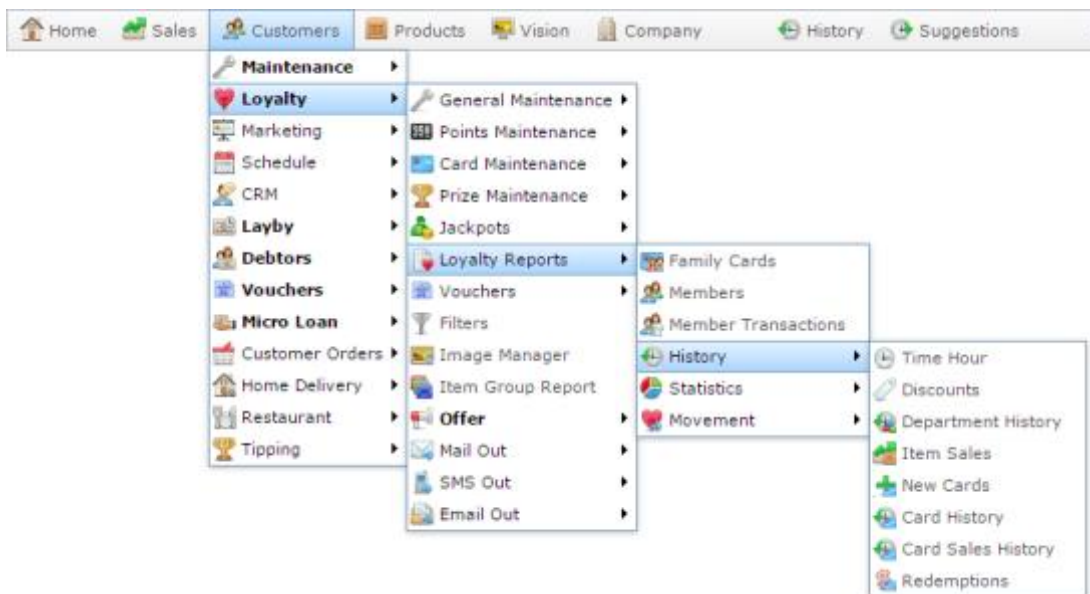
Transactions per Hour report

Use the Transactions per Hour report to view a summary of transactions over time to view trends that occur during the day.

Opening the Transactions per Hour report

To open the Transactions per Hour report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > History > Time Hour**.



The Transactions per Hour report is displayed.

Transactions per Hour by Month: Chadstone : Loyalty Only

Time	Month End 30-Jun-2015	Month End 31-Jul-2015	Month End 31-Aug-2015	Month End 30-Sep-2015	Month End 31-Oct-2015	Month End 30-Nov-2015	Month End 31-Dec-2015	Total:
11:00 - 11:59		0						0
13:00 - 13:59		0						0
14:00 - 14:59	0	0	0					0
16:00 - 16:59		0						0
17:00 - 17:59	0	0						0
Total:	0	0	0					0

States

VIC >

Site

Chadstone >

By

Month >

Date

10/12/2015

Display As

Table >

Filter

Only Loyalty Sales >

Division

All >

Department

All >

Type

Counts >

Add to Favourites

Transactions per Hour report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<div style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; display: inline-block;">Add to Favourites</div>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week or month.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
States	Select a state or county to filter the report by.
Filter	Filter to exclude loyalty transactions or non-loyalty transactions from the reports.

Field	Description
Type	Select to display:
Counts	The number of transactions for the period.
Quantities	The quantity of items sold during the period.
Sales	The total sales figures for the period.
Average Sales	The average sales for the period.
Average Quantities	The average quantity of items sold during the period.
Target Sales	The sales total for the period compared to sales targets.
Accumulative Counts	The previous total of sales plus sales during this period.
Department	Select to filter the report by department.
Display As	Select to display the information as a standard table, or in a graphical format such as a bar or pie chart.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Hours / Time	The hour of the day.
Day / Week / Month / Year end	Display the summary total for the selected period.

Note: The information displayed depends on the report filters selected.

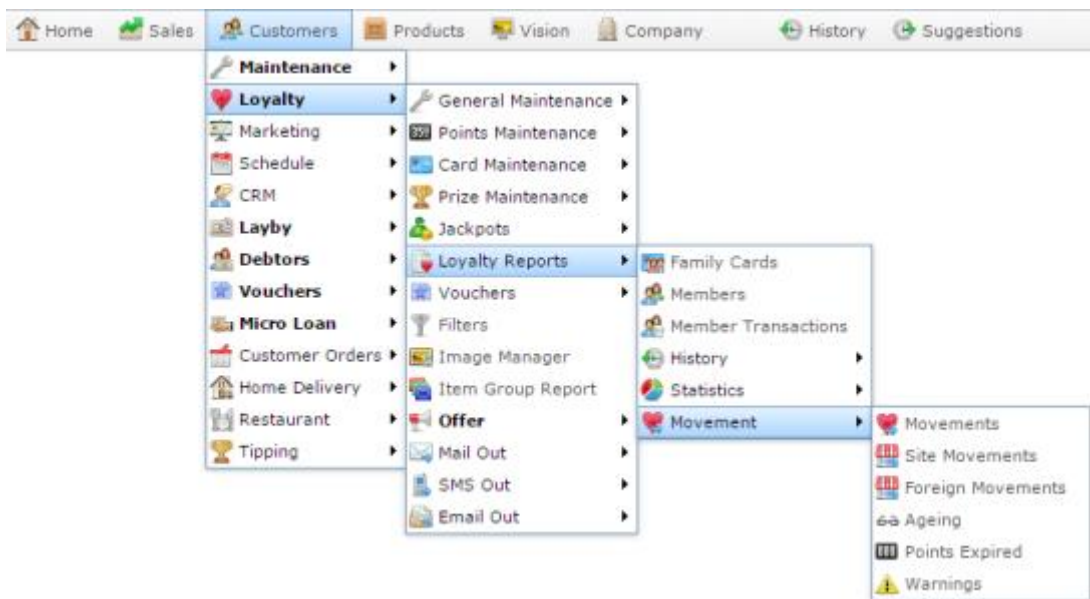
Warning Loyalty Sales report

Use the Warning Loyalty Sales report to view transactions that are abnormal. For example, unusually high or low.

Opening the Warning Loyalty Sales report

To open the Warning Loyalty Sales report:

1. Press  **Customers** from the menu bar.
2. Press **Loyalty > Loyalty Reports > Movement > Warnings**.



The Warning Loyalty Sales report is displayed.

Warning Loyalty Sales for Chadstone : 2000-11-07 to 2015-12-07 inclusive, Transaction > \$600.00

Date	Card	Journal	Terminal	Sales	Points	Bonus	Jackpot	Total Points	Discount
Total:									

Site: Chadstone

Option: > \$600.00

Date From: 7/11/2000

Date To: 7/12/2015

Add to Favourites

Warning Loyalty Sales report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
Option	Select the minimum value to report on.

Report area

This area displays report information.

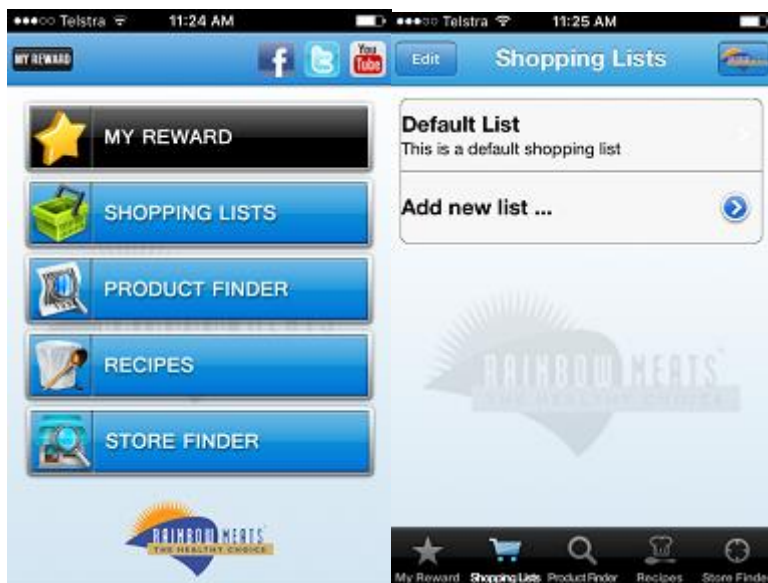
Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Date	Date of the transaction.
Card	Loyalty card number of the transaction.
Site	Site the transaction occurred at.
Journal	Journal number identifying the transaction.
Terminal	Terminal the transaction was processed at.
Sales	Total sales amount for the transaction.
Points	Total loyalty points earned or redeemed in the transaction.
Bonus	Bonus loyalty points earned in the transaction.

Field	Description
Jackpot	Jackpot incurred in the transaction.
Total Points	Loyalty member's total loyalty points as of the transaction.
Discount	Discounts applied during the transaction.

Managing phone apps

The Portal offers a mobile app for your loyalty customers, so they can access their points and transactions on their phone.



The phone app is branded to your company logo and colours, and supports access to:

- Store Location features for your sites, including their opening hours and phone numbers.

Note: This information is controlled by the Site Details and Site Hours areas of the Portal.

- Customer's loyalty points balance.
- Customer's transactions.
- Customer orders.
- Customer's details.
- Current specials on offer.
- Your company's product list.
- Instructions, recipes, or other information you want to provide.

The app can also display the customer's loyalty card barcode, which can be scanned by the Point of Sale, allowing your customers to use your loyalty program easily without having to carry a card.

See:

- *File Maintenance screen* on page 608.

- *Directory Maintenance screen* on page 612.
- *Directory Edit report* on page 601.
- *Directory report* on page 604.


What you can do:

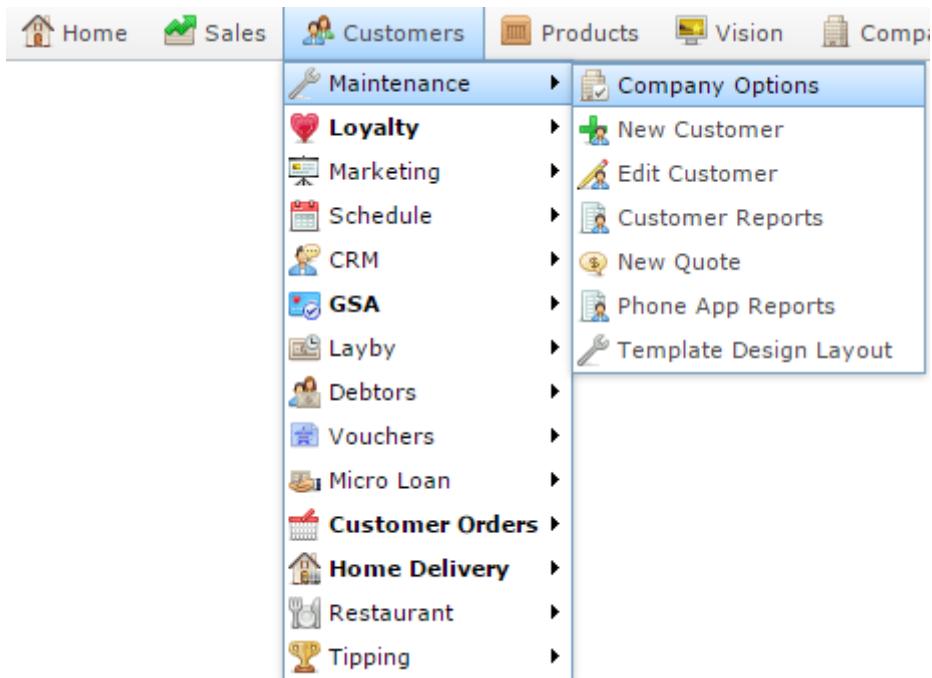
- *Creating a new directory* on page 580.
- *Editing a directory* on page 582.
- *Deleting a directory* on page 584.
- *Creating a new sub directory* on page 586.
- *Editing a sub directory* on page 588.
- *Deleting a sub directory* on page 590.
- *Creating a new phone app file* on page 592.
- *Editing a phone app file* on page 595.
- *Deleting a phone app file* on page 598.

Creating a new directory

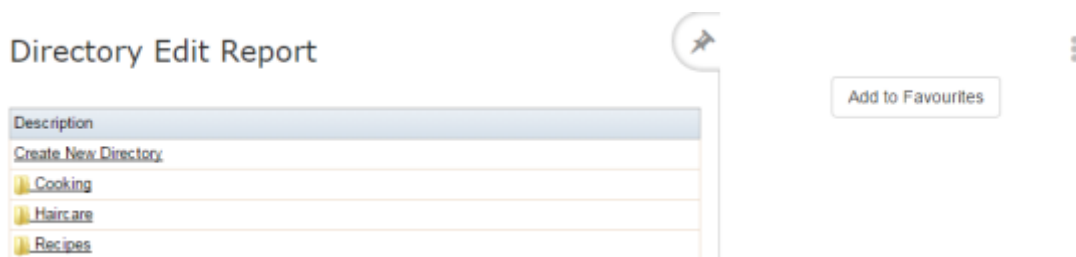
Create a new directory to store a new category of phone app files in the Portal.

To create a new directory:

1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.

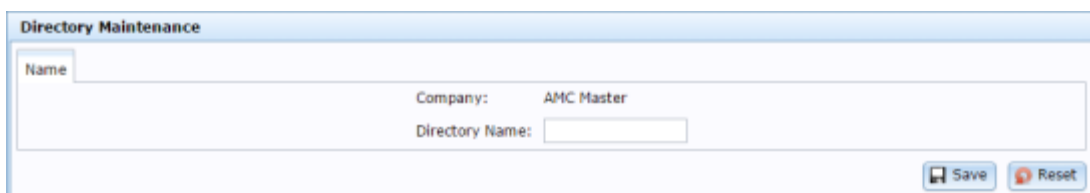


The Directory Edit report is displayed.



3. Press **Create New Directory**.

The Directory Maintenance screen is displayed.



4. Type the name of the directory in the **Directory Name** field.


5. Press .

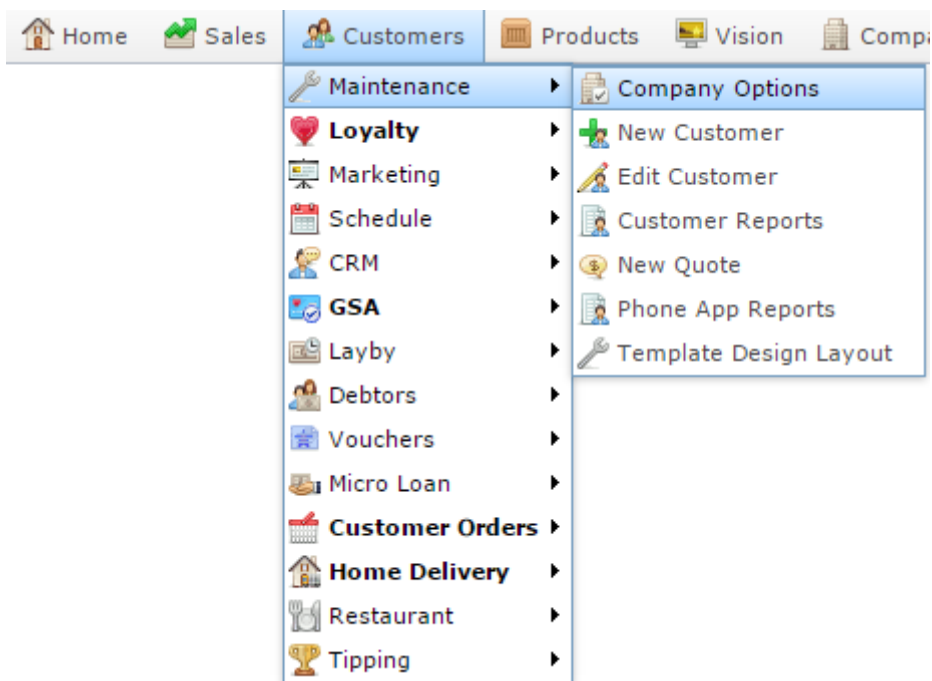
The directory is created.

Editing a directory

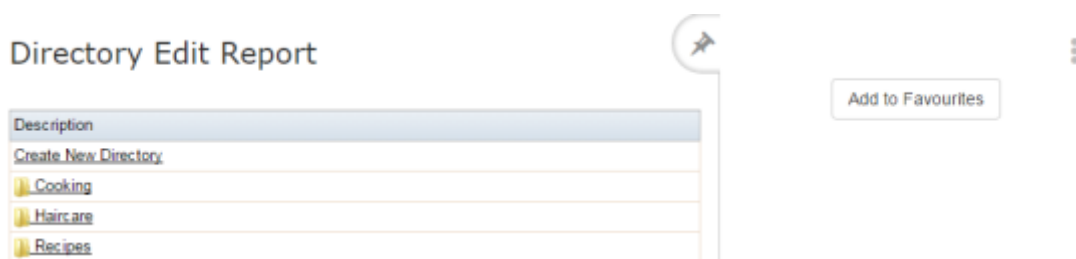
Edit a directory to change the name of the category of phone app files in the Portal.

To edit a directory:

1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.






The Directory Edit report is displayed.



3. Press the **Description** of the directory you want to view.

A popup menu is displayed.

Directory Edit Report

Description
Create New Directory
<ul style="list-style-type: none">  Browse  Edit  Delete

Add to Favourites

Note: If you want to view or edit a sub directory, press **Browse** to display the directory's contents.

4. Press **Edit**.

The Directory Maintenance screen is displayed.

Directory Maintenance

Name:

Company: AMC Master

Directory Name:

5. Type the new name of the directory in the **Directory Name** field.

6. Press  Save.


The directory is saved.

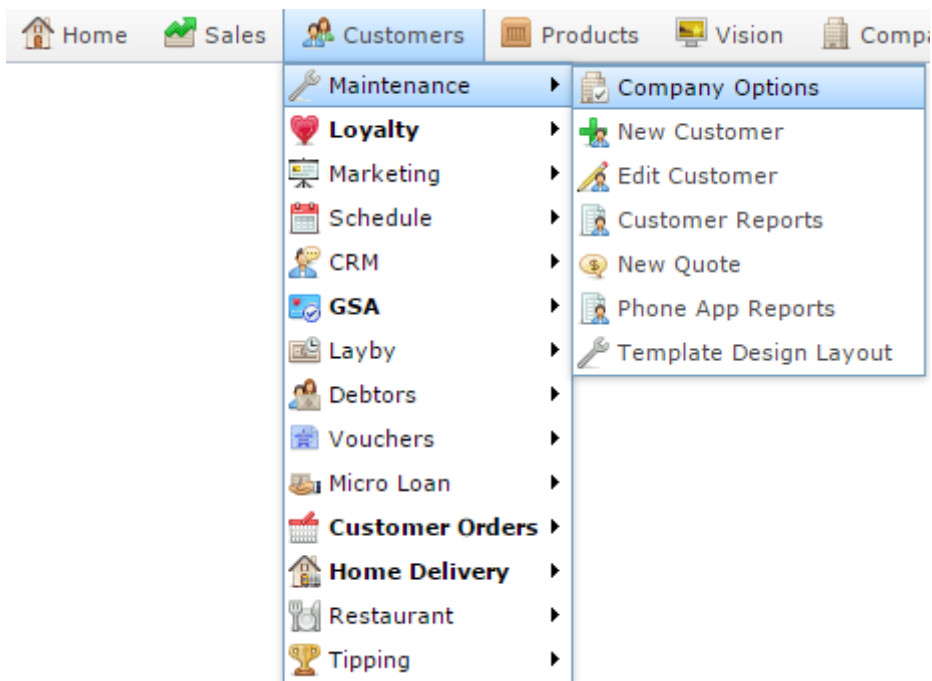
Deleting a directory

Delete a directory to remove it and its files from the Portal phone app.

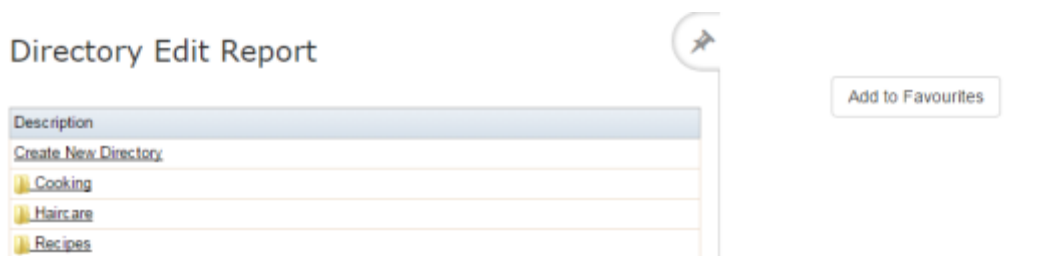
Note: The files within the directory are also deleted.

To delete a directory:

1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.

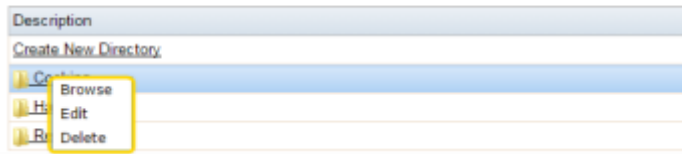


The Directory Edit report is displayed.



3. Press the **Description** of the directory you want to view.
A popup menu is displayed.

Directory Edit Report



Description
Create New Directory

[Add to Favourites](#)

Note: If you want to delete a sub directory, press **Browse** to display the directory's contents.


4. Press **Delete**.

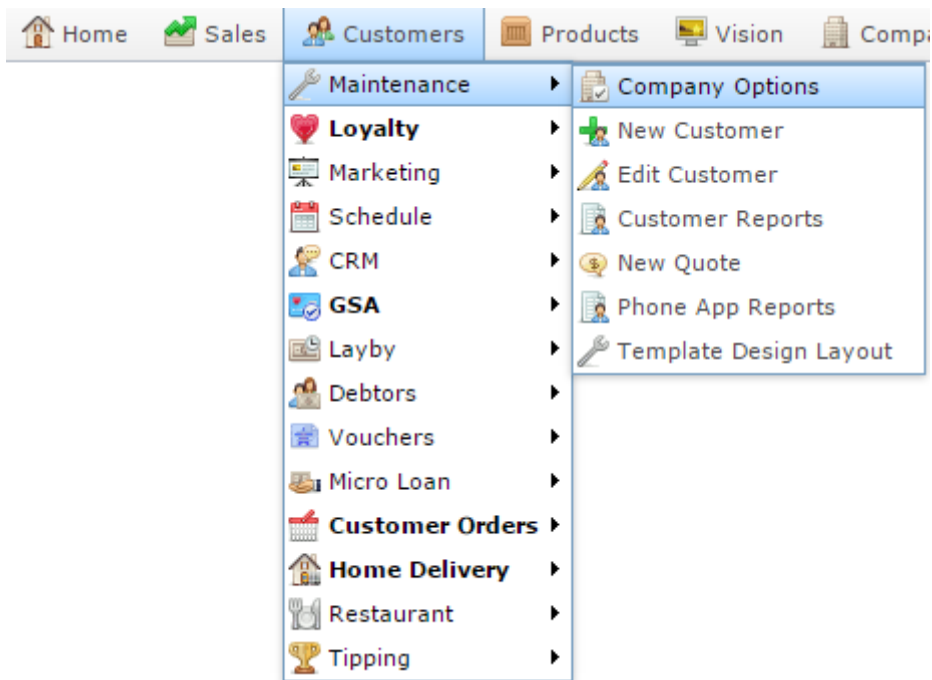
The directory is deleted.

Creating a new sub directory

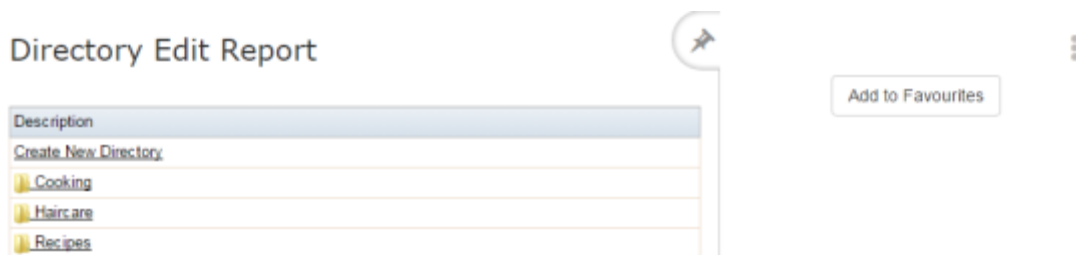
Create a new sub directory to store a new category of phone app files in the Portal. Sub-directories appear as folders within the app.

To create a new sub directory:

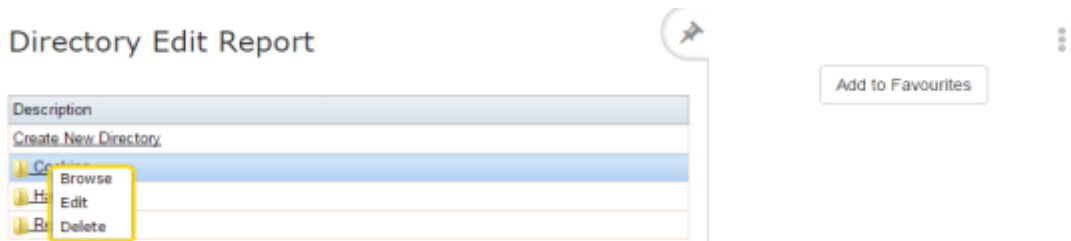
1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.



The Directory Edit report is displayed.

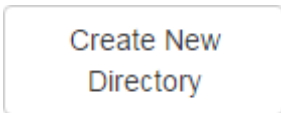
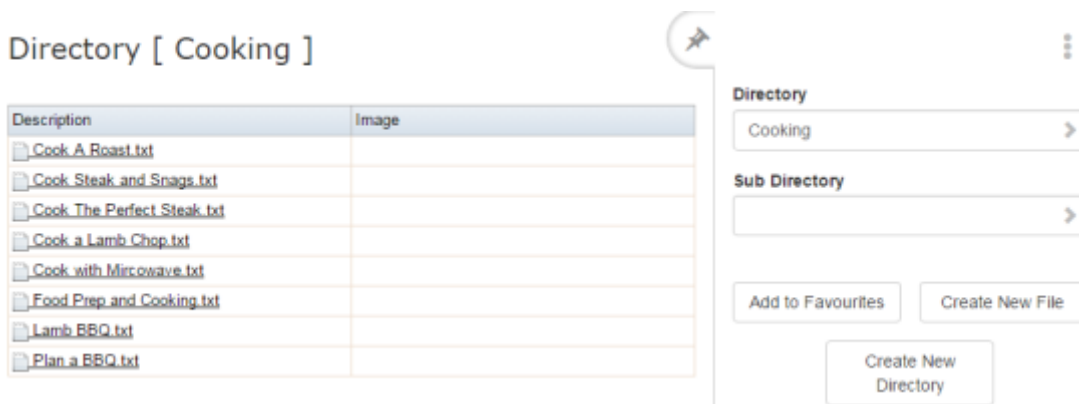


3. Press the **Description** of the directory you want to view.
A popup menu is displayed.



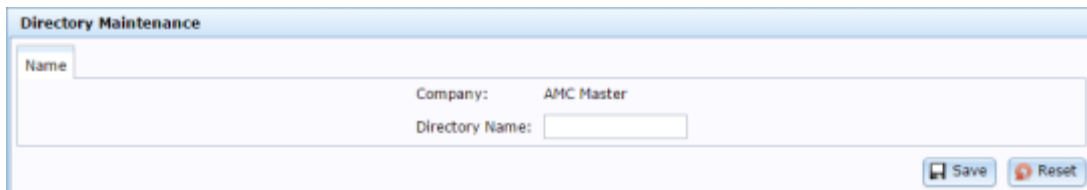
4. Press **Browse**.

The Directory report is displayed.



5. Press

The Directory Maintenance screen is displayed.



6. Type the name of the sub directory in the **Directory Name** field.


7. Press  **Save**.

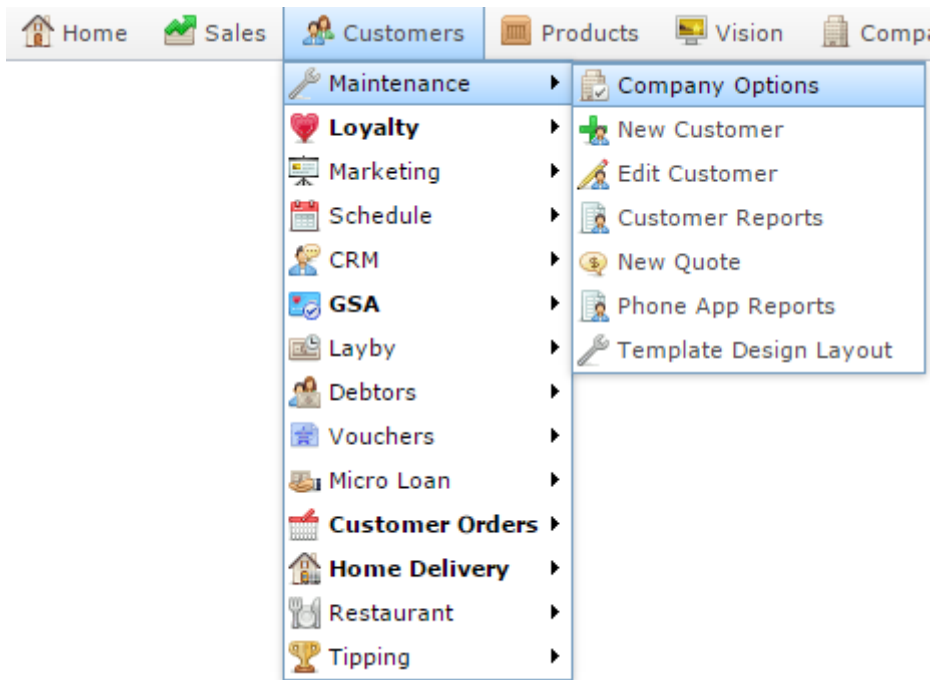
The sub directory is created.

Editing a sub directory

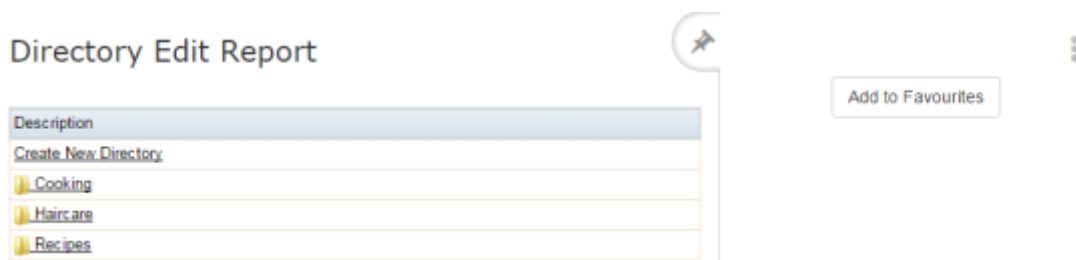
Edit a sub directory to change the name of the category of phone app files in the Portal.

To edit a sub directory:

1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.

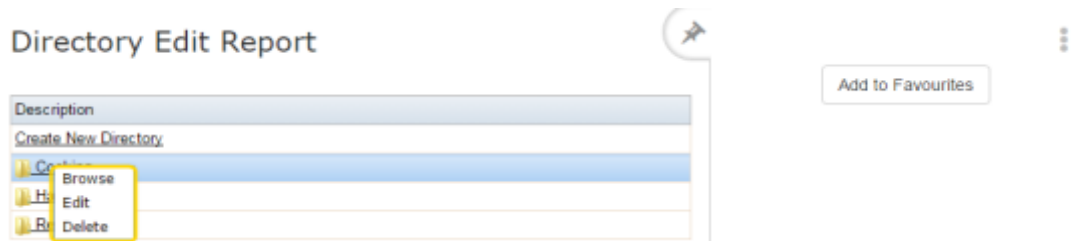


The Directory Edit report is displayed.



3. Press the **Description** of the directory you want to view.


A popup menu is displayed.



Note: If you want to view or edit a sub directory, press **Browse** to display the directory's contents.

4. Press **Edit**.

The Directory Maintenance screen is displayed.


5. Type the new name of the sub directory in the **Directory Name** field.
6. Press  **Save**.

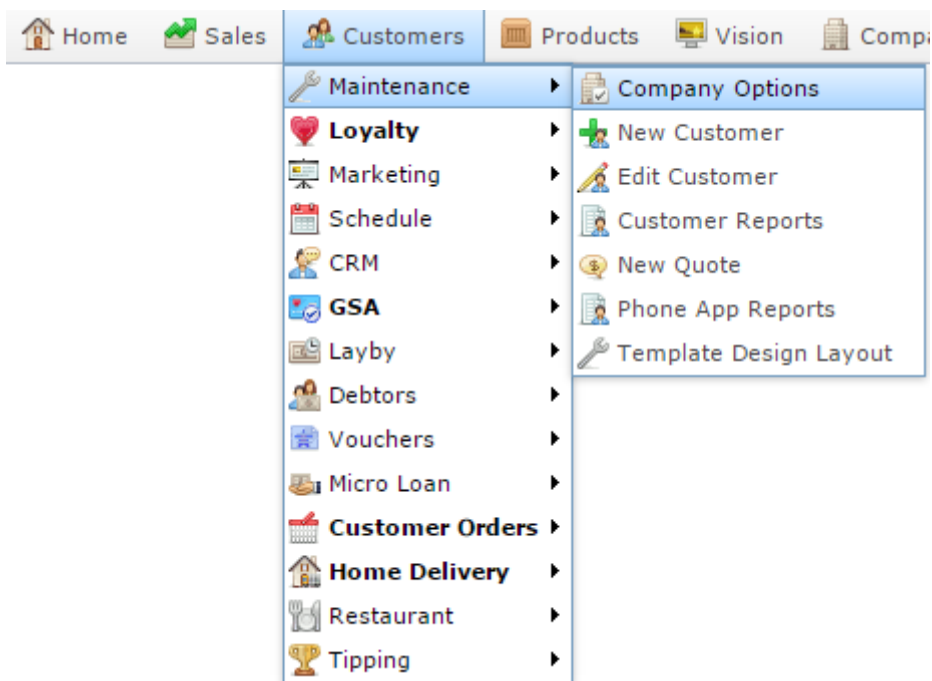
The sub directory is saved.

Deleting a sub directory

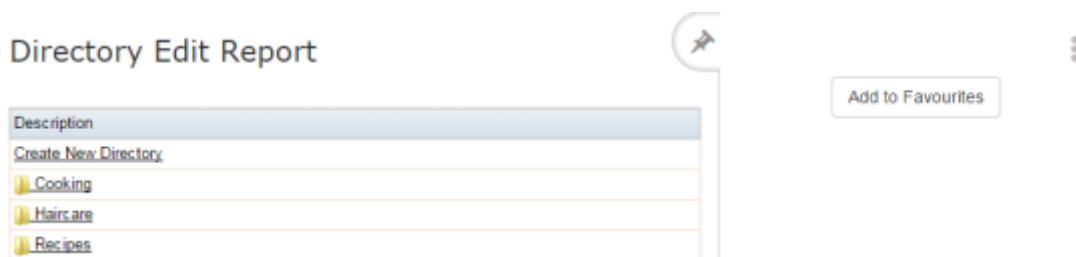
Delete a sub directory to remove it and its files from the Portal phone app.

To delete a sub directory:

1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.



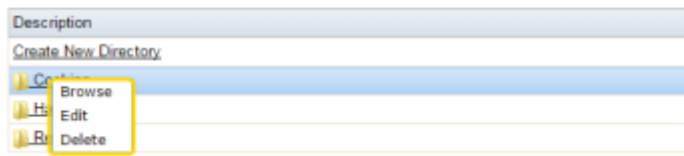
The Directory Edit report is displayed.



3. Press the **Description** of the directory you want to view.

A popup menu is displayed.

Directory Edit Report



Description
Create New Directory

[Add to Favourites](#)

Note: If you want to delete a sub directory, press **Browse** to display the directory's contents.


4. Press **Delete**.

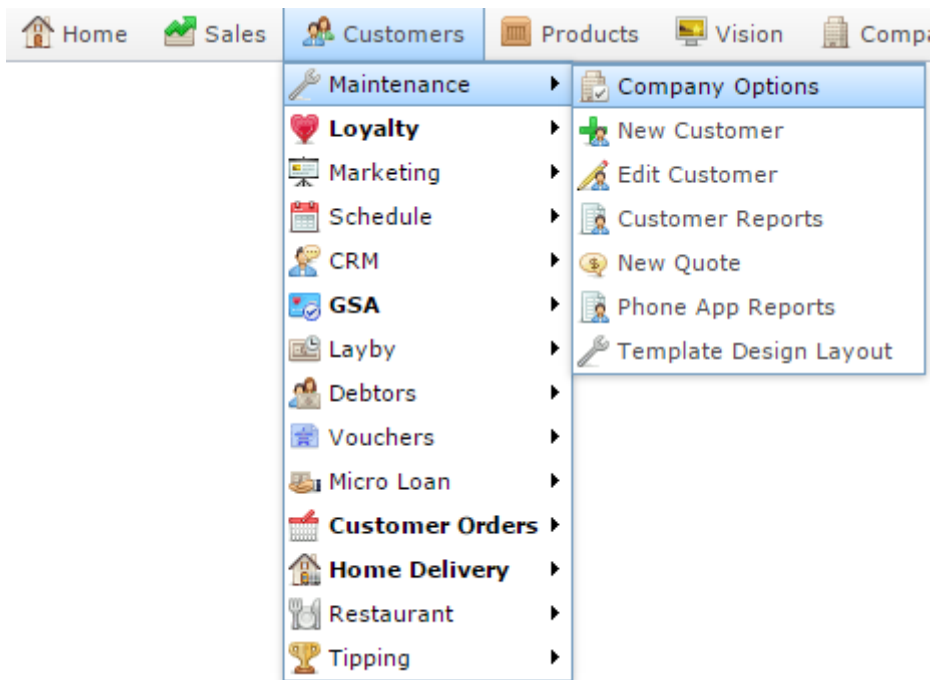
The sub directory is deleted.

Creating a new phone app file

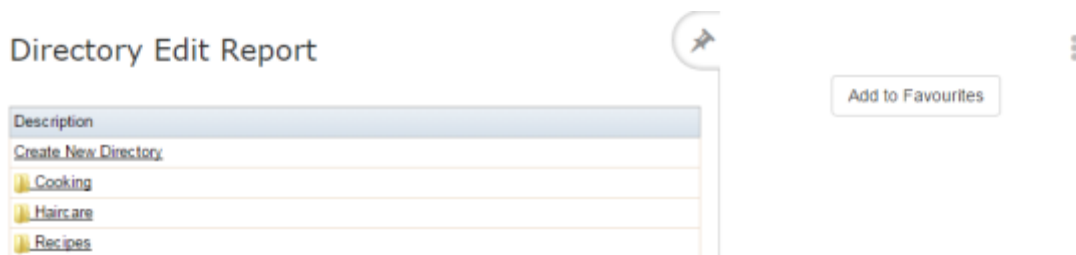
Create a new phone app file to display information to users regarding your products or services.

To create a new phone app file:

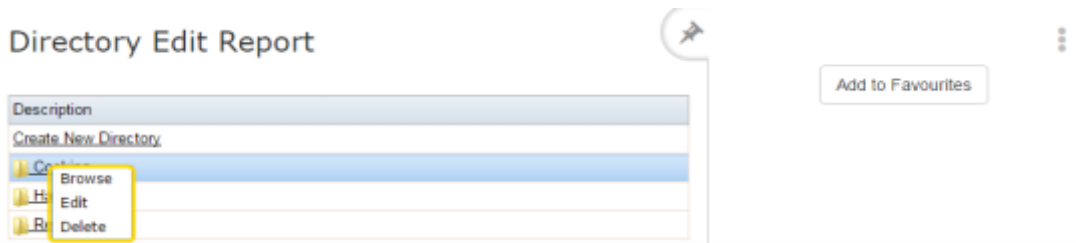
1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.



The Directory Edit report is displayed.

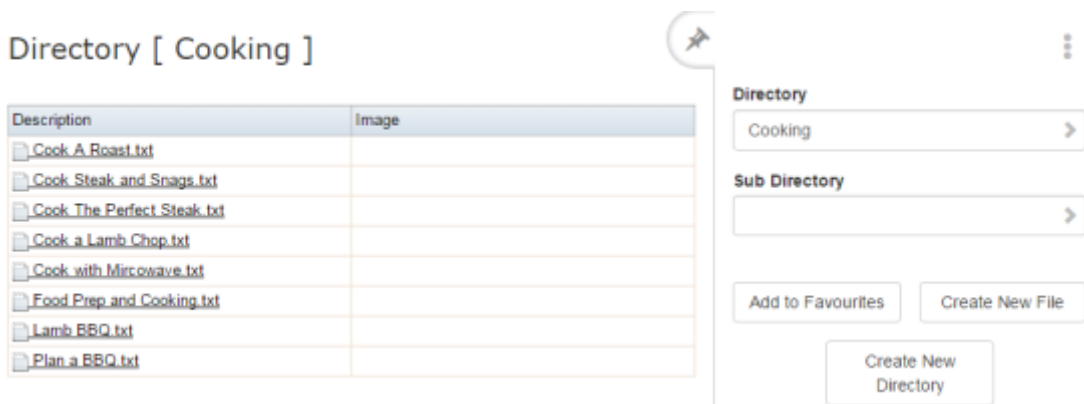



3. Press the **Description** of the directory you want to view.
A popup menu is displayed.



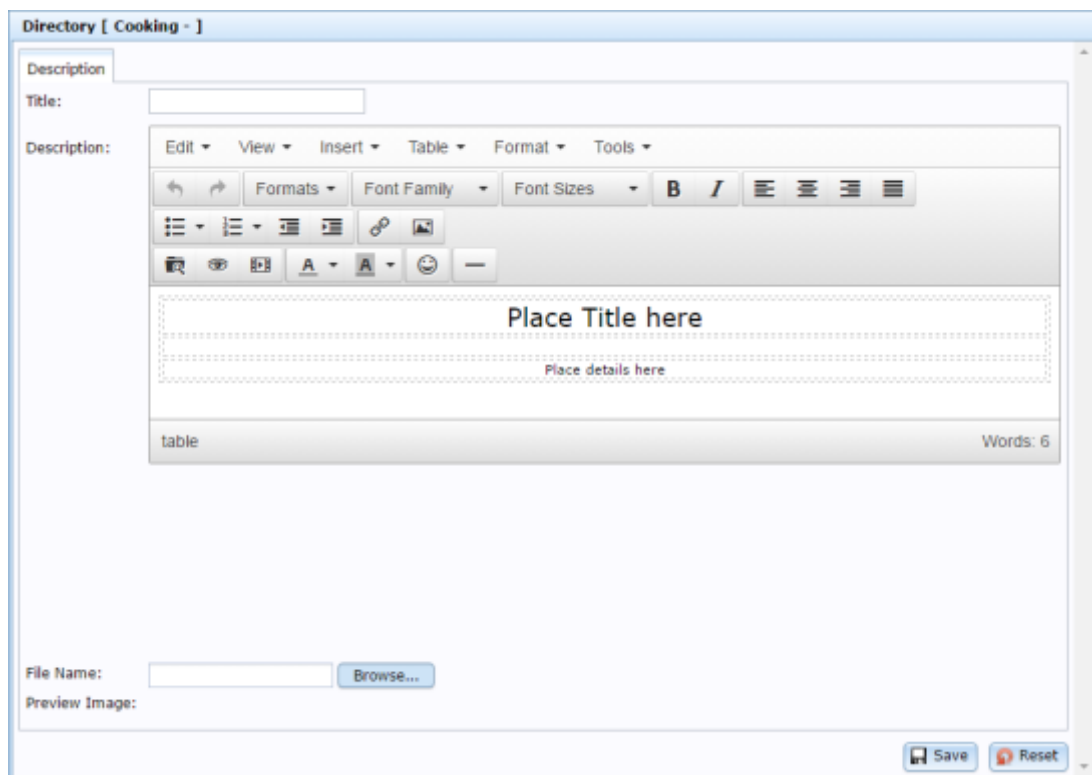
4. Press **Browse**.

The Directory report is displayed.



5. Press .

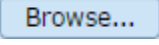
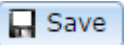
The File Maintenance screen is displayed.



Managing phone apps

6. Type the name of the phone app file in the **Title** field.
7. Type the file contents in the **Description** field.

Note: You can use the text editor features to control how the content should appear, such as bolded or coloured text.


8. Press  to upload a thumbnail image from your computer.
9. Press .

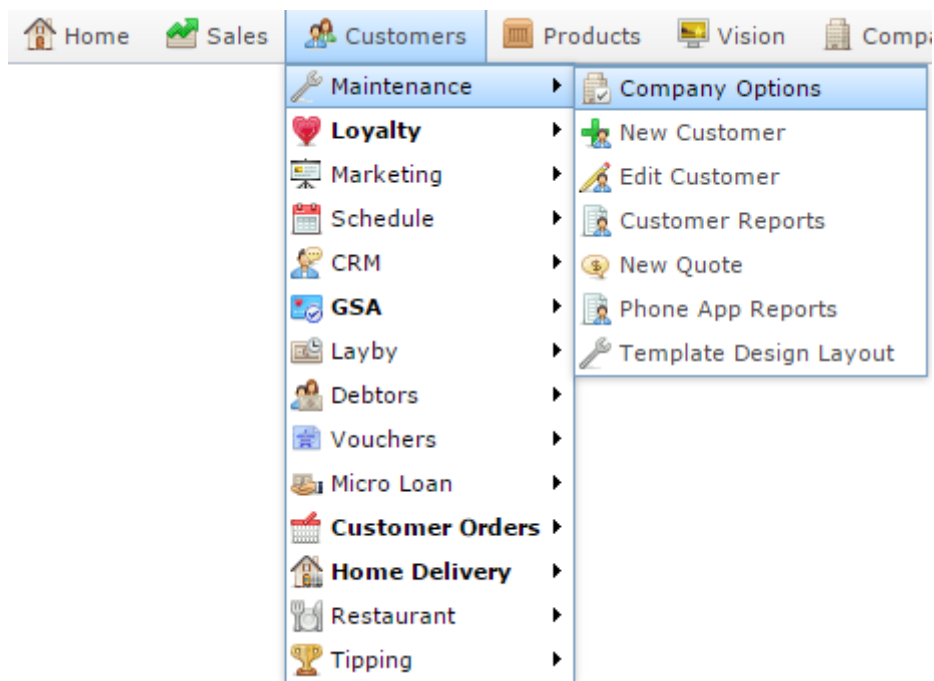
The phone app file is created.

Editing a phone app file

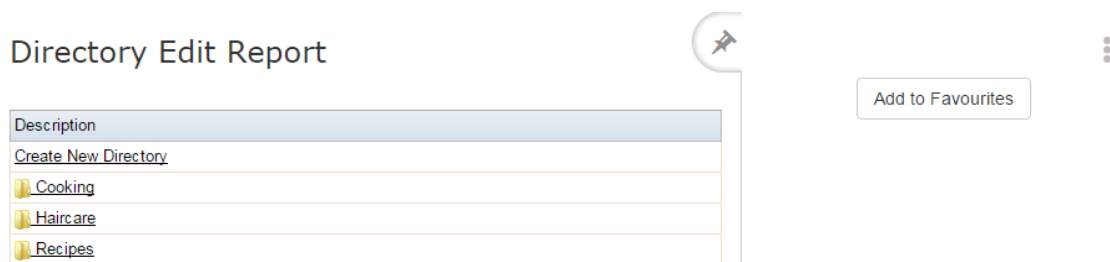
Edit a phone app file to change the content displayed to your customers.

To edit a phone app file:

1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.






The Directory Edit report is displayed.



3. Press the **Description** of the directory you want to view.
A popup menu is displayed.

Directory Edit Report









Description
Create New Directory
<ul style="list-style-type: none">  Browse  Edit  Delete

Add to Favourites

4. Press **Browse**.

The Directory report is displayed.

Directory [Cooking]

Description	Image
 Cook A Roast.txt	
 Cook Steak and Snags.txt	
 Cook The Perfect Steak.txt	
 Cook a Lamb Chop.txt	
 Cook with Microwave.txt	
 Food Prep and Cooking.txt	
 Lamb BBQ.txt	
 Plan a BBQ.txt	

Directory

Cooking >

Sub Directory

>

Add to Favourites










Create New File

Create New Directory

5. Press the Description of the file you want to open.

A popup menu is displayed.

Directory [Cooking]

Description	Image
<ul style="list-style-type: none">  Edit  Delete 	
 Cook Steak and Snags.txt	
 Cook The Perfect Steak.txt	
 Cook a Lamb Chop.txt	
 Cook with Microwave.txt	
 Food Prep and Cooking.txt	
 Lamb BBQ.txt	
 Plan a BBQ.txt	

Directory

Cooking >

Sub Directory

>

Add to Favourites

Create New File

Create New Directory

6. Press **Edit**.

The File Maintenance screen is displayed.

Directory [Cooking -]

Description

Title: Cook A Roast

Description:

Edit View Insert Table Format Tools

Formats Font Family Font Sizes **B** *I* [List Icons]

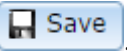
[Rich Text Editor Icons]

p Words: 0

File Name: [Field] Browse...

Preview Image:


Delete New Save Reset

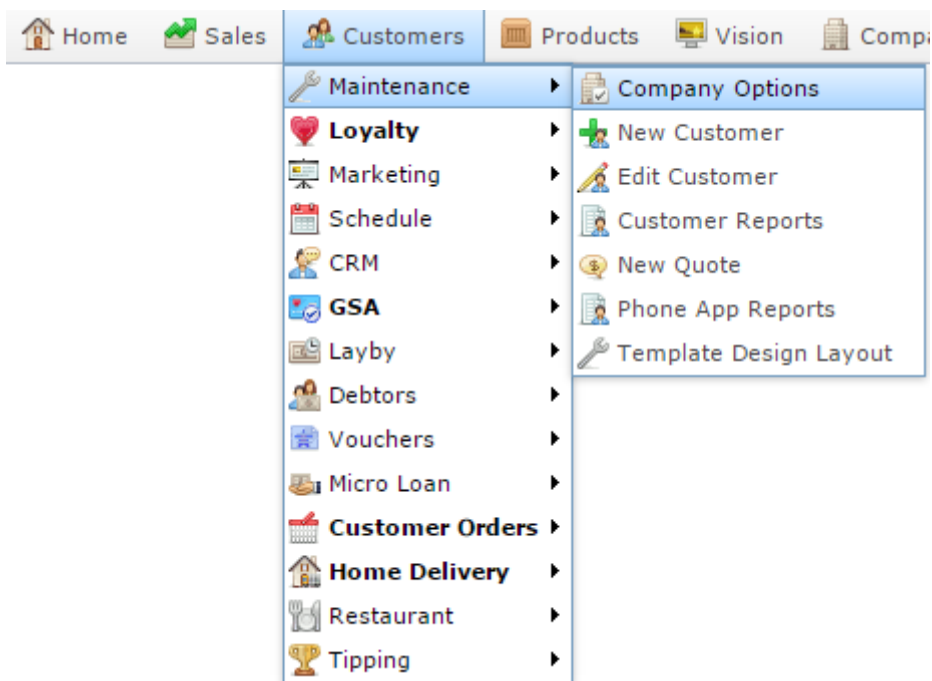
7. Make the required changes.
See *File Maintenance screen* on page 608.
8. Press  Save .
The phone app file is saved.

Deleting a phone app file

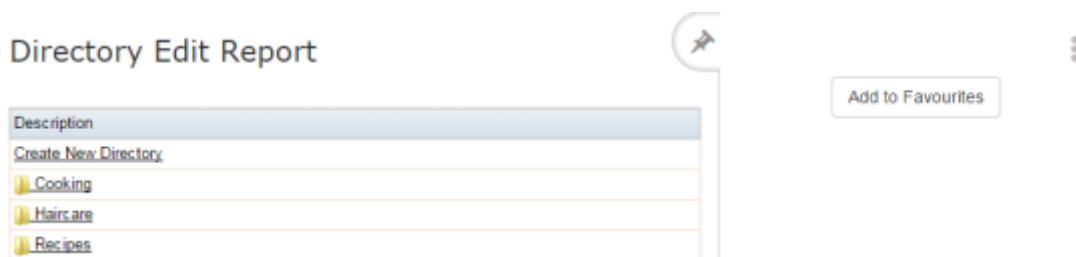
Delete a phone app file to remove it from your Portal phone app.

To delete a phone app file:

1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.

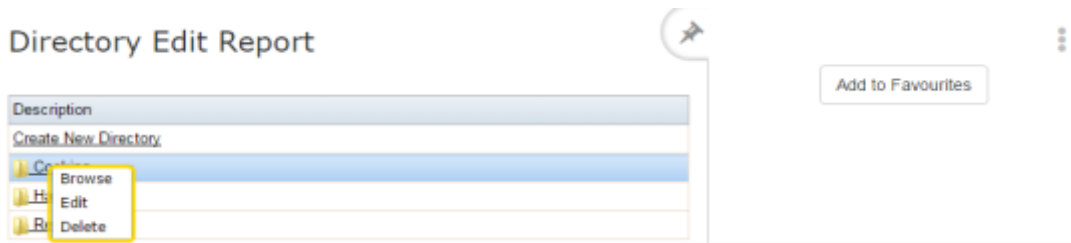


The Directory Edit report is displayed.



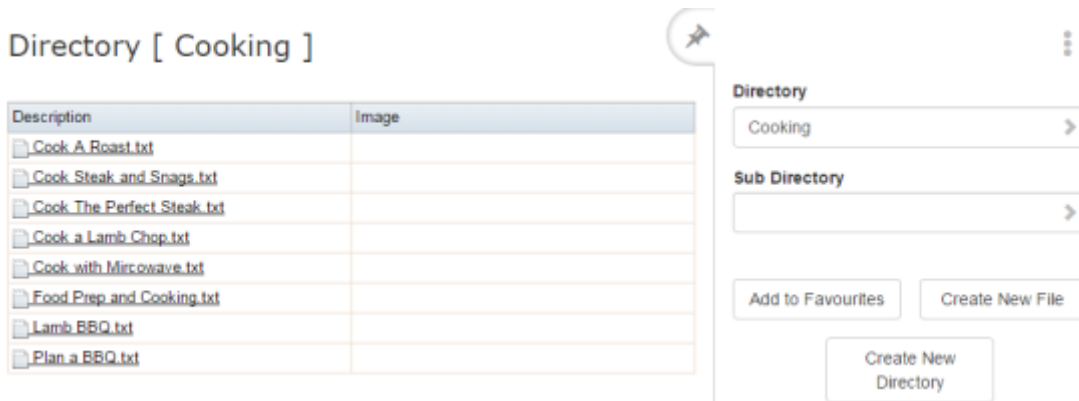
3. Press the **Description** of the directory you want to view.

A popup menu is displayed.



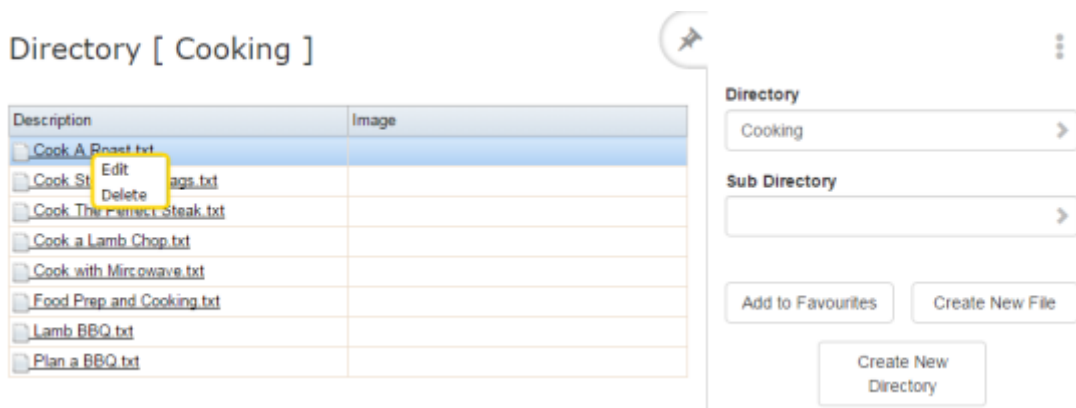
4. Press **Browse**.

The Directory report is displayed.



5. Press the Description of the file you want to open.

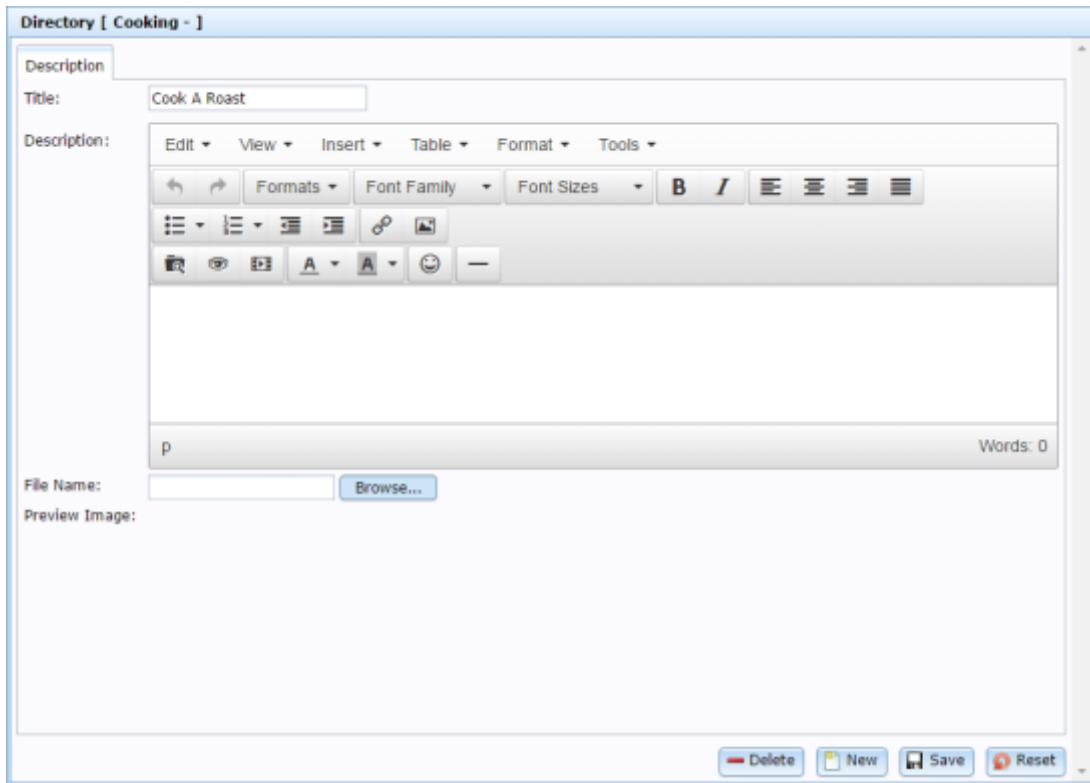
A popup menu is displayed.



6. Press **Edit**.

The File Maintenance screen is displayed.

Managing phone apps



7. Press .


The phone app file is deleted.

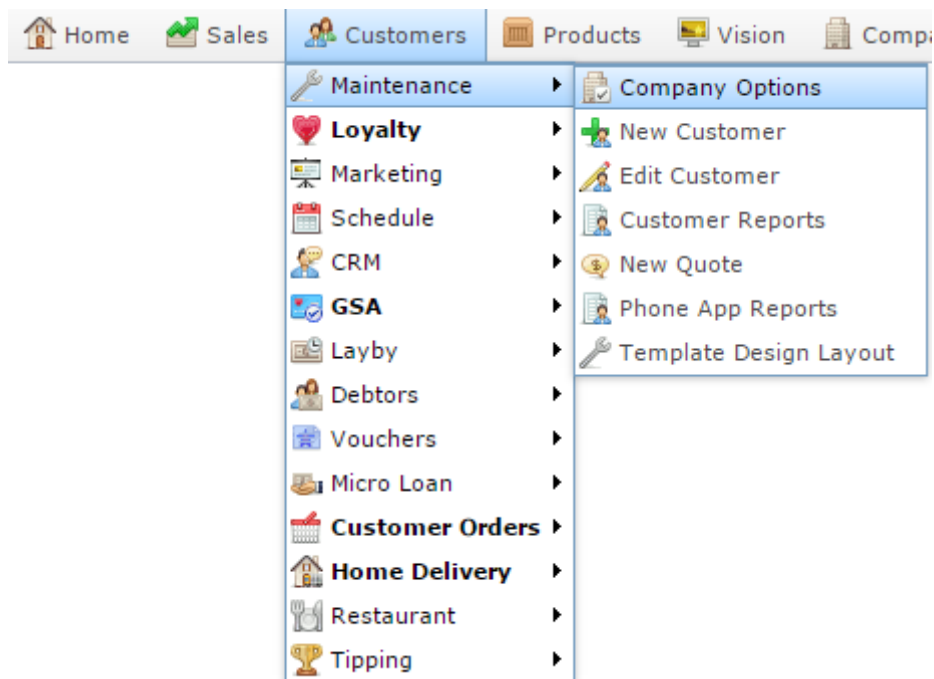
Directory Edit report

Use the Directory Edit report to view and edit categories of information for the phone app.

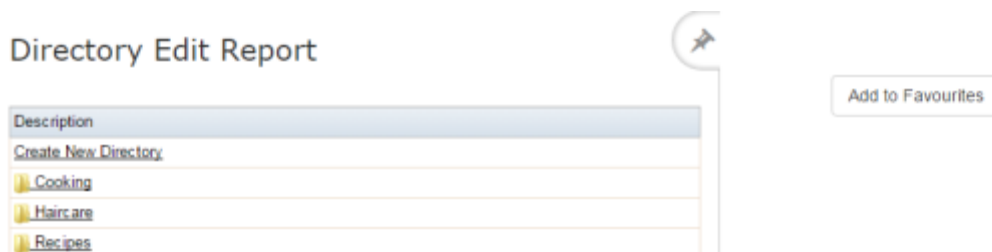
Opening the Directory Edit report

To open the Directory Edit report:

1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.



The Directory Edit report is displayed.



Directory Edit report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.


Field	Description
Description	The name of the directory. Press to open a popup menu to browse or edit the directory.

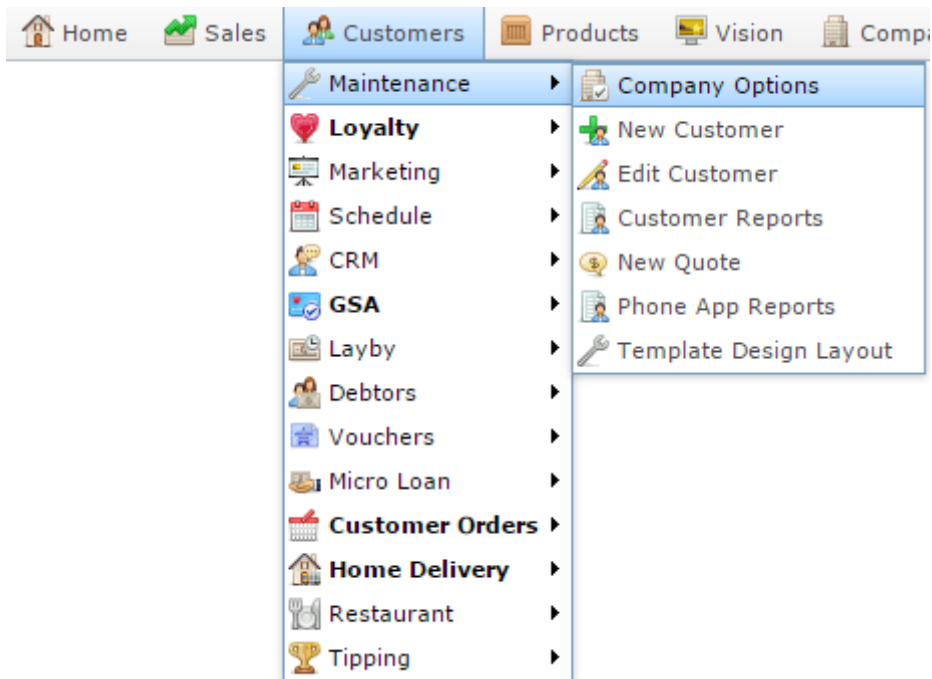
Directory report

Use the Directory report to edit, view and create files to display in the phone app.

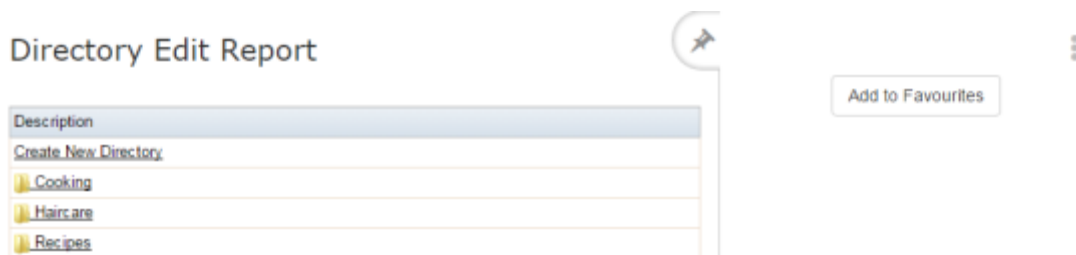
Opening the Directory report

To open the Directory report:

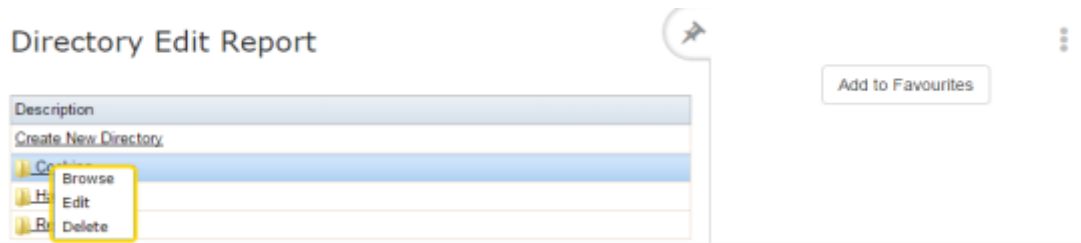
1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.



The Directory Edit report is displayed.

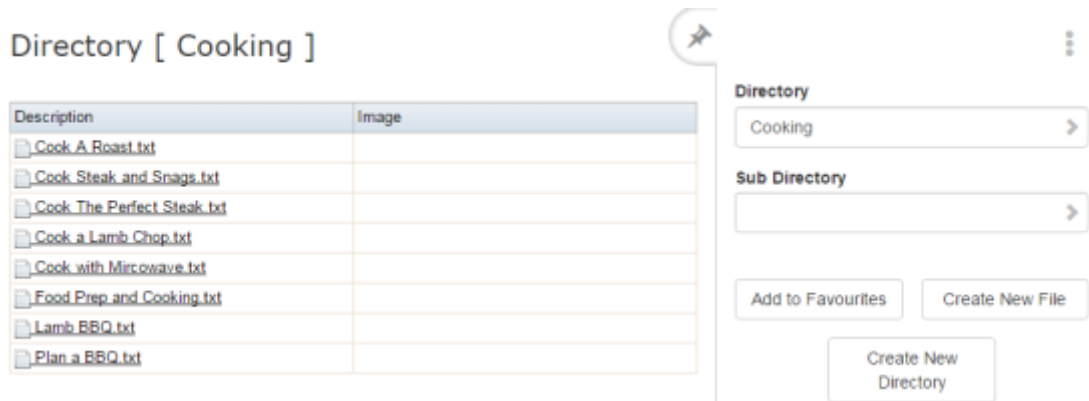


3. Press the **Description** of the directory you want to view.
A popup menu is displayed.



4. Press **Browse**.


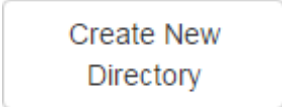

The Directory report is displayed.



Directory report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Directory	Select a directory to report on.
Sub Directory	Select a sub-directory to report on.
	Press to create a new directory.
	Press to create a new file.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.


Field	Description
Description	The name of the file or subdirectory. Press to open a popup menu to browse or edit the file or directory.
Image	The image used as the thumbnail or icon that users press to access the file content.

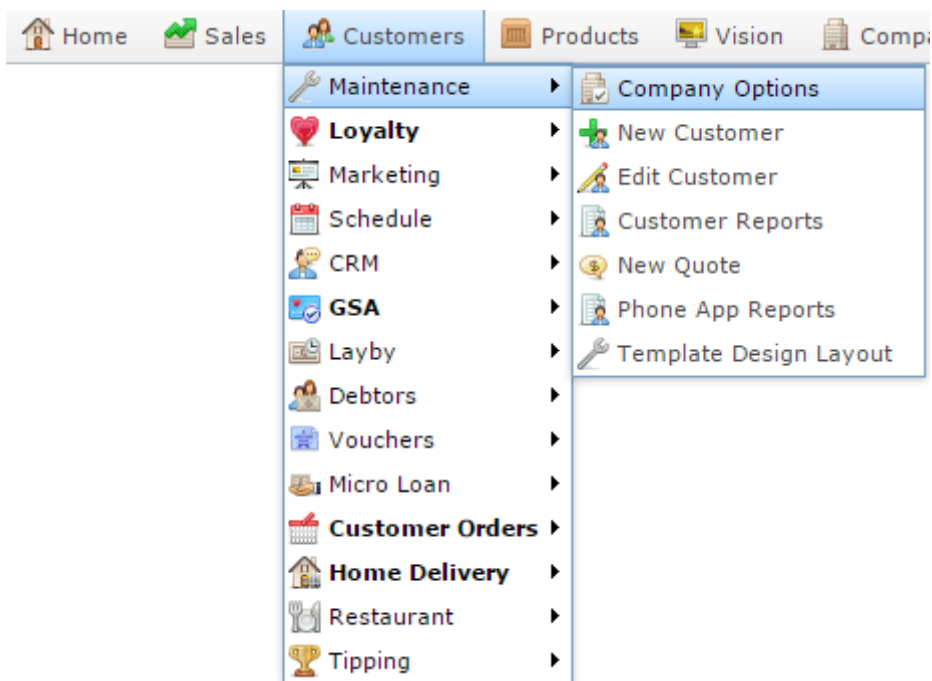
File Maintenance screen

Use this screen to create topics or files to appear on the phone app. For example, marketing materials or instructions on using the products you sell.

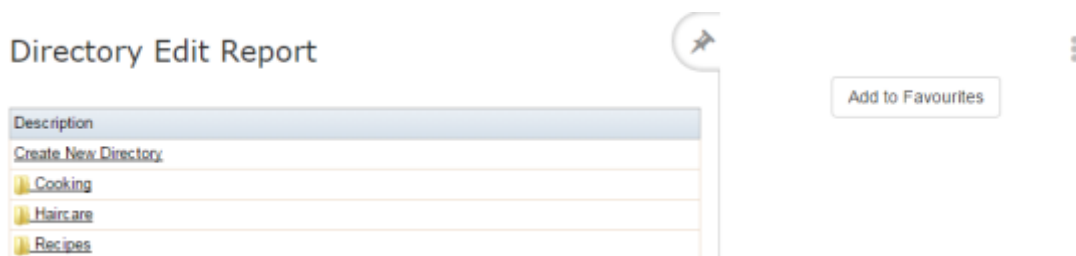
Opening the File Maintenance screen

To open the File Maintenance screen:

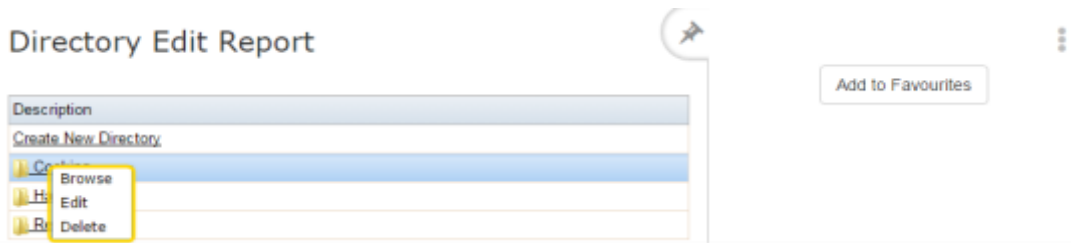
1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.



The Directory Edit report is displayed.

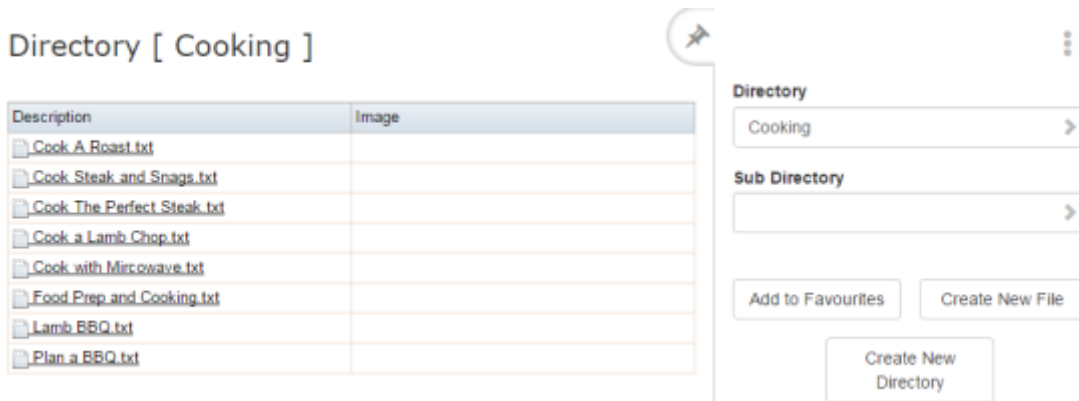


3. Press the **Description** of the directory you want to view.
A popup menu is displayed.



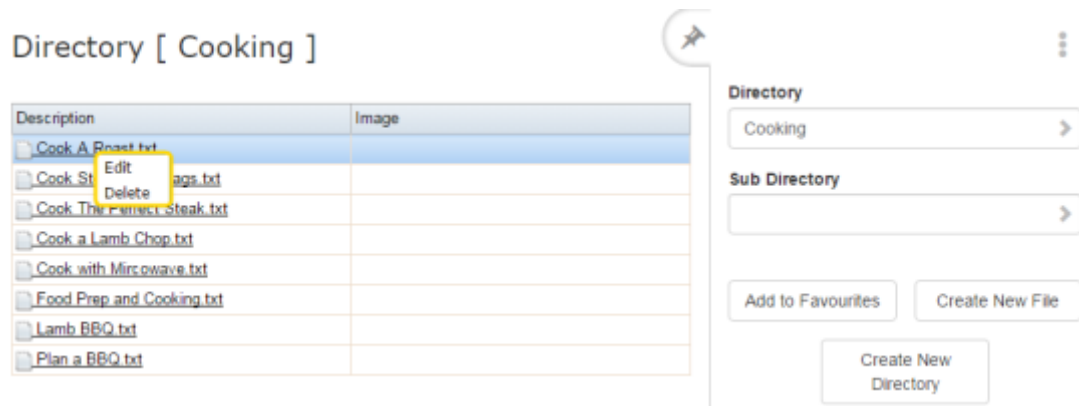
4. Press **Browse**.

The Directory report is displayed.



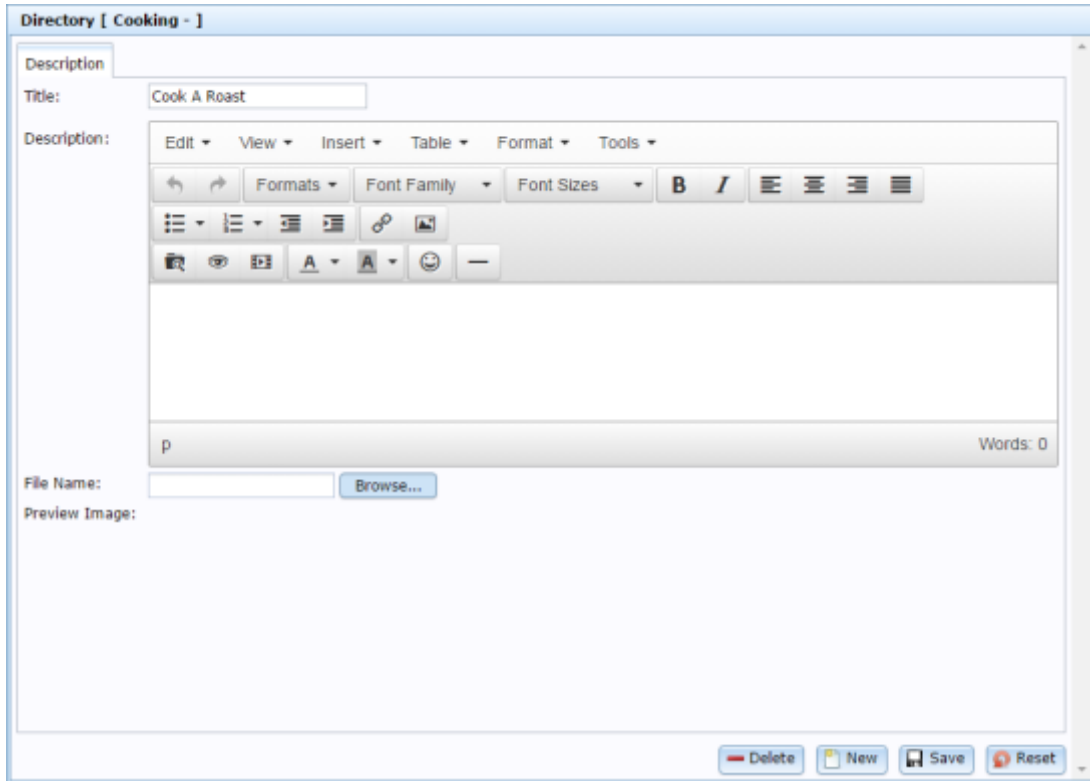
5. Press the Description of the file you want to open.

A popup menu is displayed.

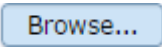
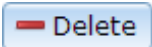





6. Press **Edit**.

The File Maintenance screen is displayed.



File Maintenance screen key fields and buttons

Field	Description
Title	Title of the file to display.
Description	Use the text editor to create the contents of the file as you want it to appear.
File Name	Filename of the image to use as a thumbnail with this file.
	Press to open a file chooser and select the thumbnail image file.
Preview Image	Preview of the image used as a thumbnail with this file.
	Press to delete this file.

Field	Description
 New	Press to create a new file.
 Save	Press to save changes to this file.
 Reset	Press to cancel any changes made to this file since it was last saved.


Directory Maintenance screen

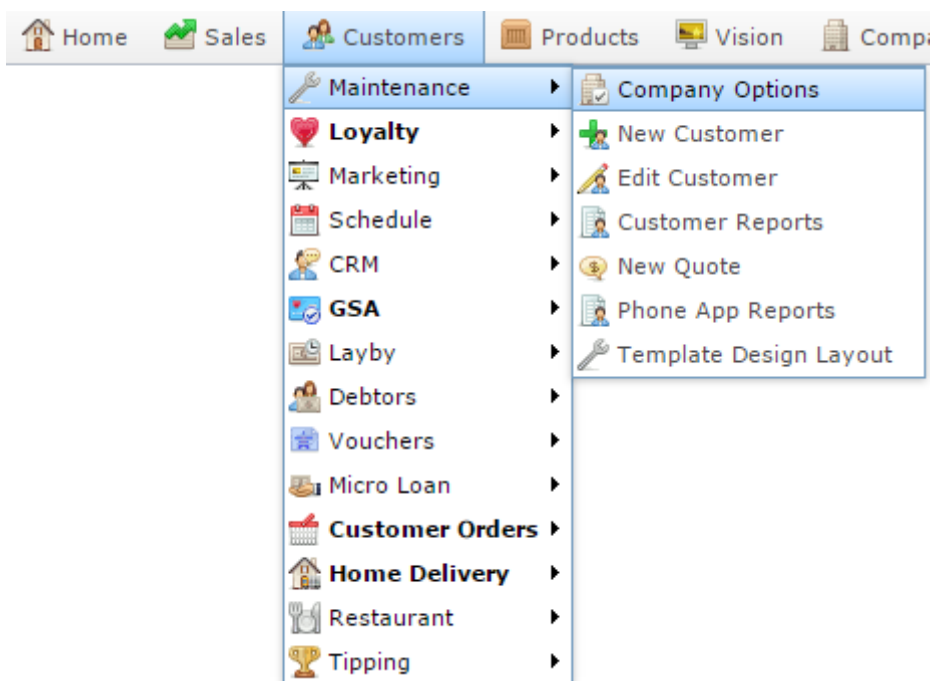
Use this screen to create directories to sort and group the files you want to display on the phone app.

Tip: You can use sub-directories to create folders within the app. See *Creating a new sub directory* on page 586.

Opening the Directory Maintenance screen




To open the Directory Maintenance screen:

1. Press  **Customers** from the menu bar.
2. Press **Maintenance > Phone App Reports**.



The Directory Edit report is displayed.

Directory Edit Report

Description
Create New Directory
 Cooking
 Haircare
 Recipes

Add to Favourites

3. Press the **Description** of the directory you want to view.

A popup menu is displayed.

Directory Edit Report

Description	Create New Directory	
		Browse
		Edit
		Delete

Add to Favourites

Note: If you want to view or edit a sub directory, press **Browse** to display the directory's contents.

4. Press **Edit**.

The Directory Maintenance screen is displayed.


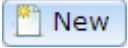
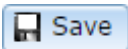
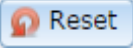
Directory Maintenance

Name:

Company: AMC Master

Directory Name:

Directory Maintenance screen key fields and buttons

Field	Description
Company	Name of the company the directory belongs to.
Directory Name	Name of the directory.
	Press to delete this directory.
	Press to create a new directory.
	Press to save changes to this directory.
	Press to cancel any changes made to this directory since it was last saved.

Managing team tipping

You can manage team tipping competitions such as footy tipping through the Portal. The Portal manages tipping uses groups, teams, venues and rounds.

A group represents the overarching game league that the tipping applies to, such as the AFL (Australian Football League), NRL (National Rugby League), etc. Each group has several teams that play games against each other, and several venues that the games occur at.

A round represents a period of time during which several teams may play games against each other. Tipping participants place predictions on how well each team will perform in each round, and are awarded points for each round based on how accurate they were.

Note: All creation and maintenance of tipping groups, teams, venues and rounds is performed by AMC Convergent IT administrators. If you need help setting up tipping for your company, contact AMC Convergent IT for assistance.

See:

- *Tipping Group Details report* on page 615.
- *Tipping Member report* on page 629.
- *Tipping Teams Details report* on page 621.
- *Tipping Venue Details report* on page 618.
- *Tipping Round Details report* on page 625.
- *Tipping Round Scores report* on page 633.

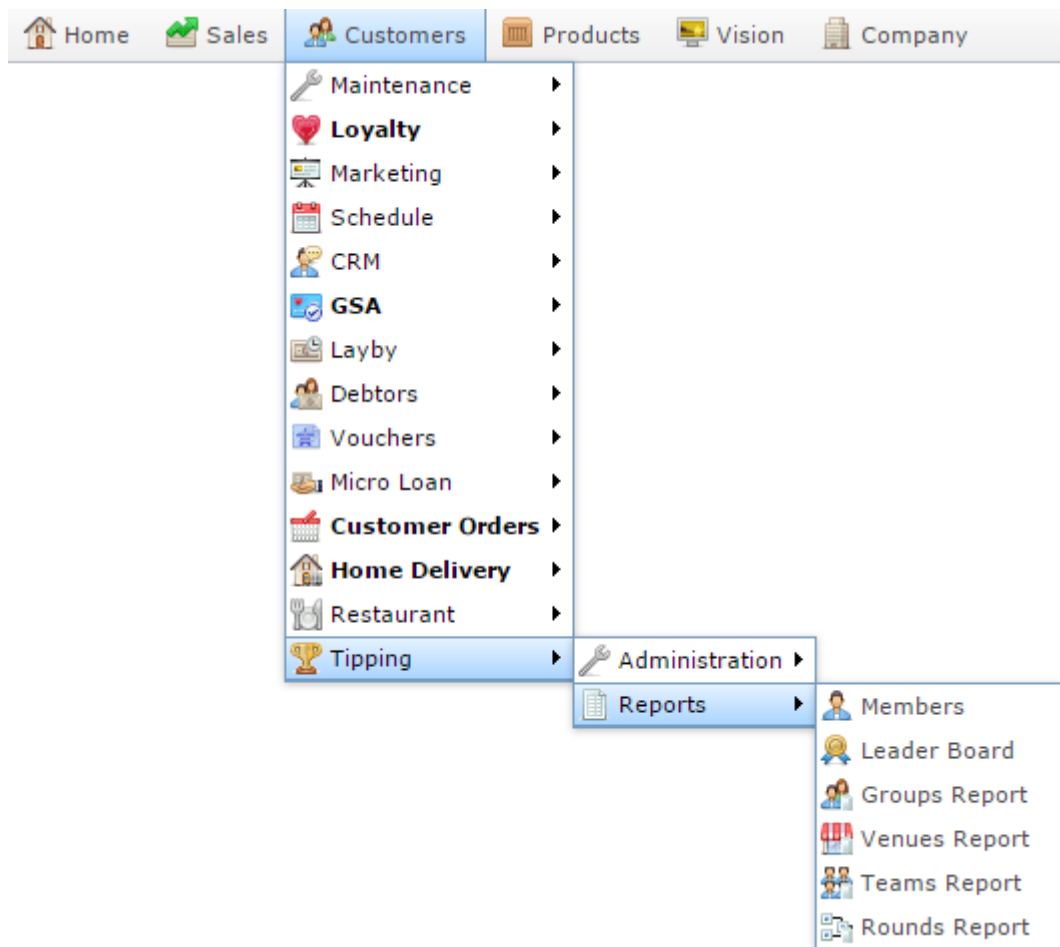
Tipping Group Details report

Use the Tipping Group Details report to view the tipping groups configured in the Portal.

Opening the Tipping Group Details report

To open the Tipping Group Details report:

1. Press  **Customers** from the menu bar.
2. Press **Tipping > Reports > Groups Report**.



The Tipping Group Details report is displayed.

Tipping Group Details

Description	Group #	Team Count	User
AFL	1	18	Bob
New	2	0	Noel

Add to Favourites

Tipping Group Details report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.


Field	Description
Description / Group	Description of the group.
Group #	Unique number identifying the group.
User	User who last performed an edit.
Team Count	Number of teams in the group.

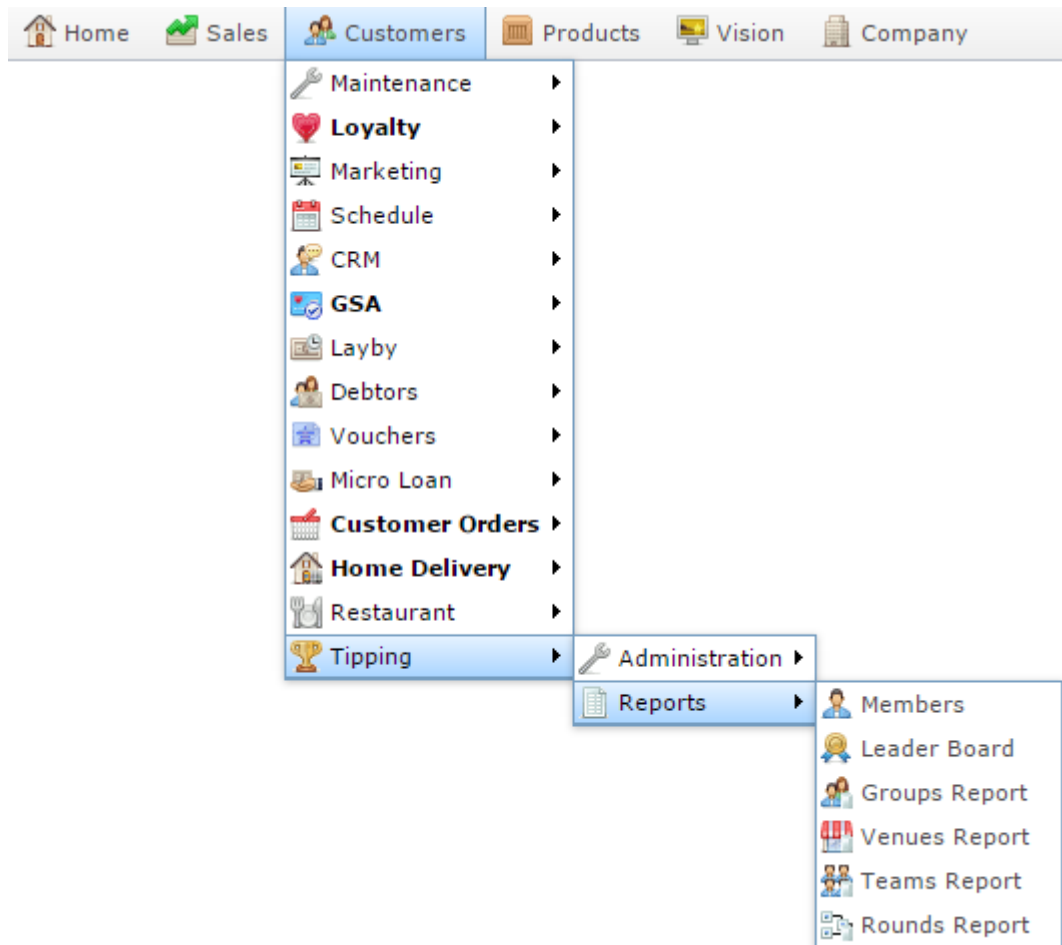
Tipping Venue Details report

Use the Tipping Venue Details report to view the tipping venues available in the Portal.

Opening the Tipping Venue Details report

To open the Tipping Venue Details report:

1. Press  **Customers** from the menu bar.
2. Press **Tipping > Reports > Venues Report**.



The Tipping Venue Details report is displayed.

Tipping Venue Details

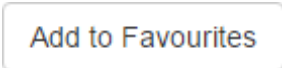
Description	Group	Venue #	User
AAMI Stadium	AFL	2	CSV Load
ANZ Stadium	AFL	8	CSV Load
Aurora Stadium	AFL	9	CSV Load
Blacktown Park	AFL	17	CSV Load
Blundstone Arena	AFL	18	CSV Load

Group:

Tipping Venue Details report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Group	Select the tipping group to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the venue.
Description / Group	Description of the group.
Venue #	Unique number identifying the venue.
User	User who last performed an edit.

Tipping Teams Details report

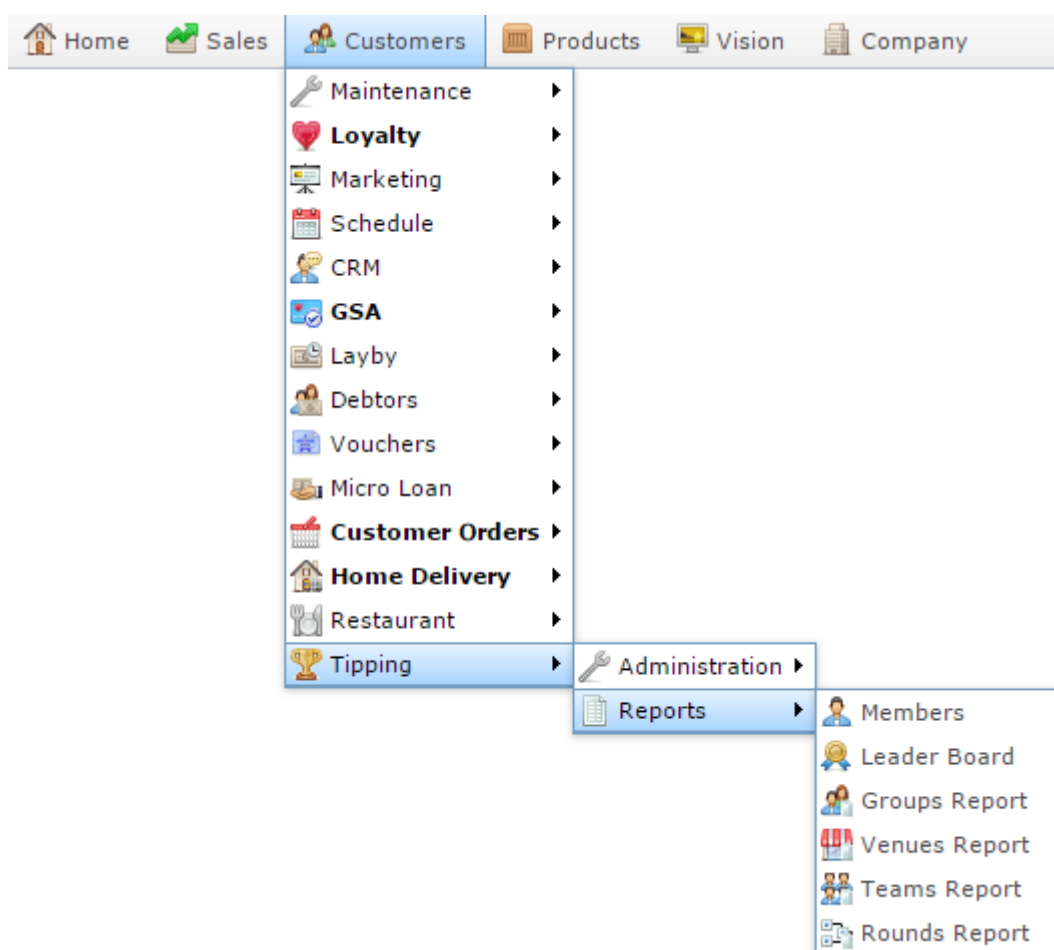
Use the Tipping Teams Details report to view the tipping teams available in the Portal.

Note: Only Master Administrators can create and edit tipping information. Contact AMC Convergent IT if you need assistance setting up tipping.

Opening the Tipping Teams Details report

To open the Tipping Teams Details report:

1. Press  **Customers** from the menu bar.
2. Press **Tipping > Reports > Teams Report**.



The Tipping Teams Details report is displayed.

Tipping Teams Details

Description	Group	Image #
Adelaide Crows	AFL	1
Brisbane Lions	AFL	2
Carlton	AFL	3
Collingwood	AFL	4
Essendon	AFL	5

Group

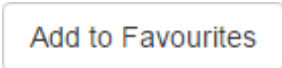
AFL

Add to Favourites

Tipping Teams Details report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Group	Select the tipping group to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the team.
Description / Group	Description of the group.
Image #	Unique number identifying the team logo to display on the tipping kiosk.

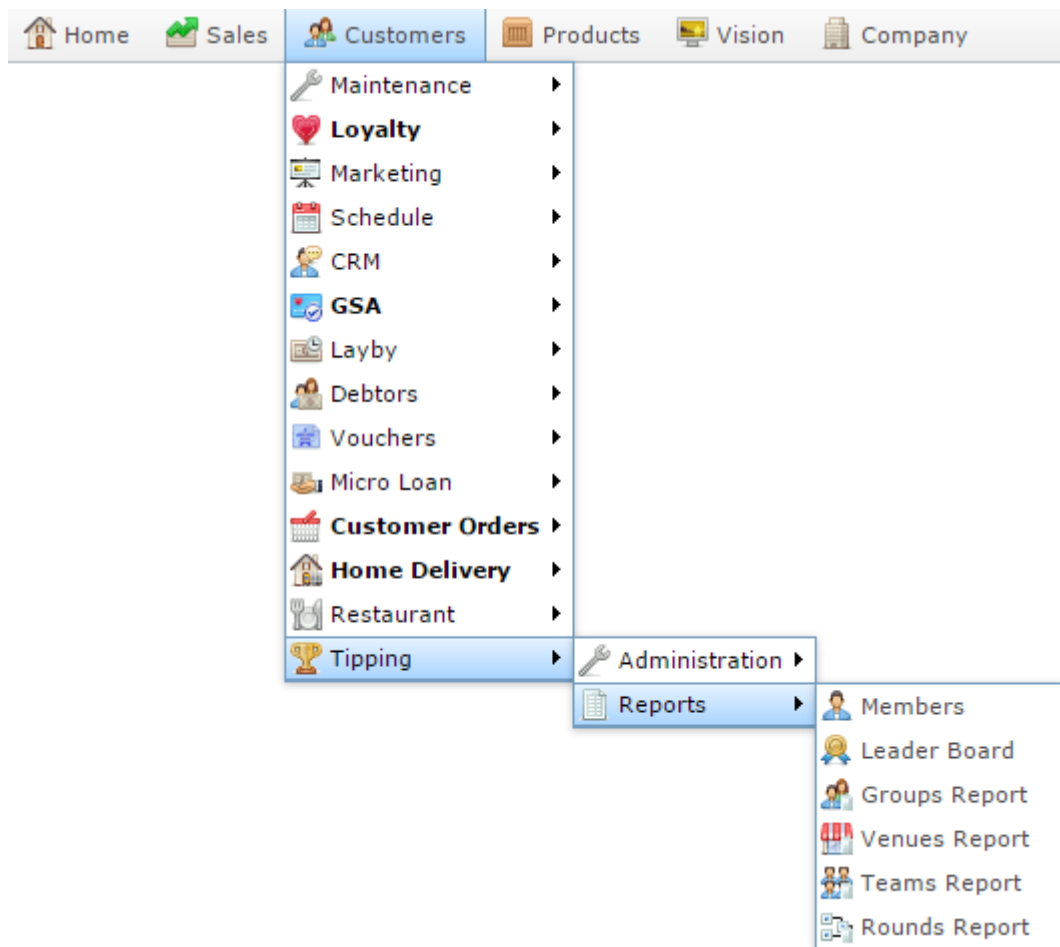
Tipping Round Details report

Use the Tipping Round Details report to view the tipping rounds in the Portal.

Opening the Tipping Round Details report

To open the Tipping Round Details report:

1. Press  **Customers** from the menu bar.
2. Press **Tipping > Reports > Rounds Report**.



The Tipping Round Details report is displayed.

Tipping Round Details

Description	Group	Round #	Date
Round 1	AFL	1	24/03/2012
Round 2	AFL	2	5/04/2012
Round 3	AFL	3	13/04/2012
Round 4	AFL	4	20/04/2012
Round 5	AFL	5	25/04/2012
Round 6	AFL	6	4/05/2012
Round 7	AFL	7	11/05/2012
Round 8	AFL	8	18/05/2012

Group

AFL >

Round

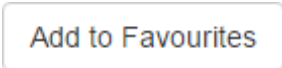
All >

Add to Favourites

Tipping Round Details report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Round	Select the round to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the round.
Description / Group	Description of the group.
Round #	The number identifying the round.
Date	Date the round edited.

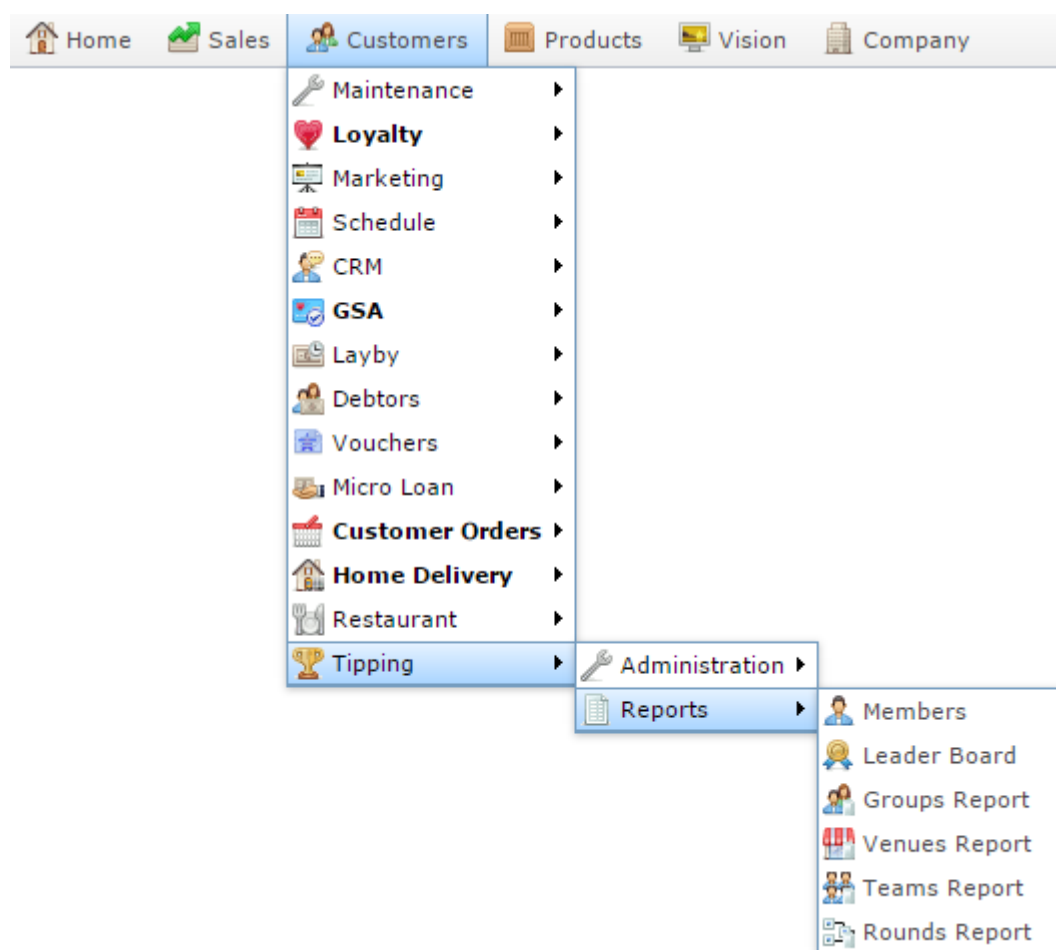
Tipping Member report

Use the Tipping Member report to view participants' details in the Portal.

Opening the Tipping Member report

To open the Tipping Member report:

1. Press  **Customers** from the menu bar.
2. Press **Tipping > Reports > Members**.



The Tipping Member report is displayed.

Tipping Member Report

Name	Card #	Mobile	Phone	Email	Post Code
Bird,Bob	2100999999999	411103370			

Group

All >

Home Site

All >

Card Type

Default >

Round

All >

Add to Favourites

Tipping Member report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Group	Select the tipping group to report on.
Home Site	Select the home site to filter the report to.
Round	Select the round to report on.
CardType	Select the filter the report to a card type.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name	Name of the participant.
Card #	Unique number identifying the participant.
Mobile	Participant's mobile number.
Phone	Participants phone number.
Email	Participant's email address.
Postcode	Participant's post code.

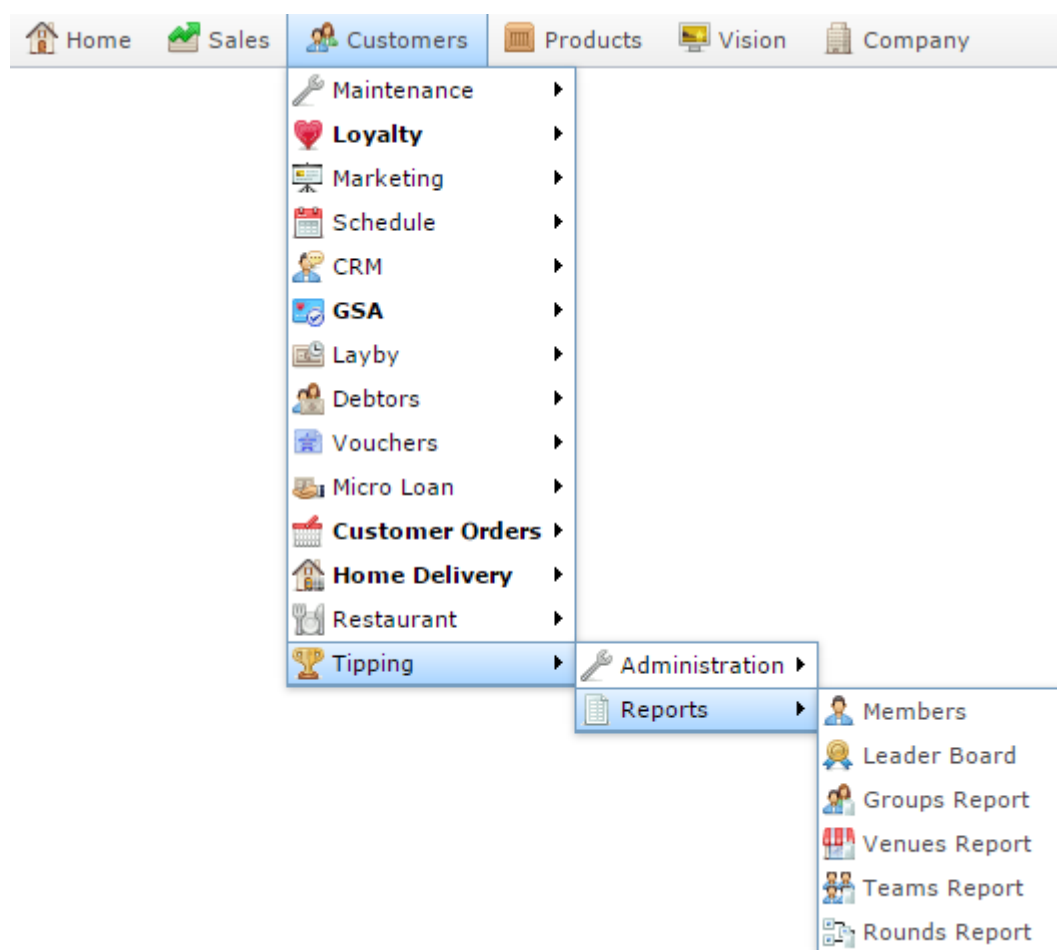
Tipping Round Scores report

Use the Tipping Round Scores report to view individual's tipping progress in the Portal.

Opening the Tipping Round Scores report

To open the Tipping Round Scores report:

1. Press  **Customers** from the menu bar.
2. Press **Tipping > Reports > Leader Board**.



The Tipping Round Scores report is displayed.

Tipping Round Scores

Name	Card #	Tipped	Given	Total	Rank
Bird,Bob	2100999999999	0	0	0	10000

Group

AFL >

Round

All >

Home Site

All >

Card Type

Default >

Add to Favourites

Tipping Round Scores report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Group	Select the tipping group to report on.
Home Site	Select the home site to filter the report to.
Round	Select the round to report on.
CardType	Select the filter the report to a card type.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name	Name of the participant.
Card #	Unique number identifying the participant.
Tipped	Points awarded to the participant from successful tipping. 1 point is awarded for each team the participant picked correctly each round.
Given	Points awarded to the participant by default, when the participant did not tip a game, and the away team won.
Total	Total points accrued by the participant.
Rank	Participant's current tipping rank.

Glossary

Account

An account is a general ledger structure that categorises particular kinds of income or expenditure for financial reports. Accounts may also be called Ledgers in the Portal.

Aged balance

An aged balance is an amount of money owed that has been adjusted to factor an interest rate applied over time. For example: you owe a creditor \$1000, with a 10% interest. You pay \$700, leaving \$300 still to pay. After the interest period elapses, 10% interest is applied to the remaining \$300. Your aged balance is now \$330.

Balance

A balance is the total amount of money owed either by yourself to a creditor, or by a debtor to you. A balance may be:

- Positive, indicating money is owed.
- Zero, indicating no money is owed.
- Negative, indicating the party who owed money has over-paid. For example, if you pay a creditor \$1000 when you only owed \$999, your balance would be -\$1.

Barcode

A barcode is a string of numbers that links to an item. Items can have multiple barcodes assigned to them. Some barcodes called Price Embedded Barcodes encode information such as the quantity, weight or price of the item into the barcode. You can configure different types of price embedded barcodes in the Portal.

Batch (kit manufacture)

When manufacturing kits, a batch identifies a single point in time where a specified number of kits were manufactured together.

Batch (stock take)

When performing a continuous stock take, a batch identifies a collection of items scanned at one time by one or more PDTs.

Brand

A brand is a means of identifying items that belong to the same product line. Items can only have one brand, but items from different suppliers may have the same brand.

Company

A company represents your organisation within the Portal. A company can have one or more sites, representing physical locations of stores, including online stores. Some Portal configurations and features affect the entire company, other configurations can be specified per site.

Complete Order

A customer order is complete when:

- The order has been fulfilled on the Portal.
- The order has been marked as paid in full on the Portal or the customer has paid the remaining amount on the Point of Sale.
- The order has been collected or delivered.

Contract

A contract is a set of rules dictating the price, quantity and incentives offered by a supplier for a specific item, used by the Portal when calculating the best supplier to purchase a particular quantity of that item. Each contract relates to a single supplier and item, and you can have multiple contracts for each supplier and each item.

Controlled purchase order / Controlled requisition

A controlled purchase order or requisition cannot be finalised until it has been authorised by Head Office.

Cost matrix / price matrix

A cost matrix or price matrix is a means by which the Portal can automatically calculate the price of an item at each price level based on the item's supplier cost. You can create multiple cost levels, so that the price levels of an item that cost \$5 might be calculated very differently from an item that cost \$10.

A price matrix can be:

- Department-based, where all items within a department follow the same cost level rules.
- Supplier-based, where all items from the same supplier follow the same cost level rules.

Only one method can be used. You can also elect to use neither.

Credit adjustment

A credit adjustment adds credit to a balance, decreasing the amount of money owed. For example, if you owed a creditor \$100, a \$10 credit adjustment would mean you owed \$90. Credit adjustments are usually used to correct errors. If you need to decrease money owed due to a refund or return, you should use a credit note instead.

Credit limit

A credit limit is the maximum amount of money a debtor is allowed to owe your organisation at any one time. For example, if a debtor's credit limit is \$1000 and they already owe \$900, they can only go into debt to the value of another \$100.

Credit note

A credit note adds credit to a balance, decreasing the amount of money owed. It is usually created when a balance needs to be adjusted due to a return, refund or rebate.

Creditor

A creditor is an entity to whom your company owes money. They may be a supplier, providing the items your company sells, or they may provide another service, such as a cleaner. The Portal treats suppliers and creditors the same. They have a balance tracking how much you owe them, and a credit limit that determines how much your company is allowed to owe them at a time.

Creditor payment

A creditor payment is a Portal record of paying invoices or debit adjustments. More than one invoice or debit adjustment may be paid either partially or in full in a single payment record. Creditor payments are a Portal record only and are not connected to your bank account.

Cross-reference

A cross-reference records the supplier's internal item code for an item to streamline the ordering process. Cross-references can make stock receipting easier, if suppliers use their internal codes on delivery dockets. Cross-references are also required to use the Portal Data Interchange (PDI) feature.

Colour

A colour is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

Customer

A customer is a person or organisation who purchases items in advance, to be collected or delivered at a later date. Customers may also have debtor accounts, where they are allowed to owe money to your organisation and can pay off that debt via the Point of Sale.

Debit adjustment

A debit adjustment debits a balance, increasing the amount of money owed. For example, if you owed a creditor \$100, a \$10 debit adjustment would mean you owed \$110. Debit adjustments are usually only used for corrections. If you need to record a charge due to an order of goods or services, you should use an invoice.

Delivery docket

A delivery docket is a type of stock receipt that records the incoming stock without creating a creditor invoice. Delivery dockets cannot record delivery fees or discounts. You can match delivery docket stock receipts to creditor invoices.

Department

A department is a means of categorising items in your inventory. Items can belong to only one department. Depending on your Portal configuration, you may have up to five levels of departments in a hierarchy, by default called Departments, Sub Departments, Categories, Sub Categories and Ranges.

Note: This documentation uses the Portal default names for these levels: Department and Division. Your Portal may be configured to use different names, but the function is the same. You can see the names and levels your Portal uses in the Department Layers tab of Company Maintenance.

Department promotion

A department promotion is a promotion that applies to all items within a specific department. A department promotion allows you to provide a discount for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

Discount

A discount is a reduction in the price of an item. Discounts can apply to:

- A selected item, calculated either per-unit or per-line.
- The whole transaction, calculated per-unit or per-line for every item in the transaction.

Note: Some items may have discount maximums. If the discount you select is greater than the maximum discount allowed for the item, the item is only discounted up to its maximum level.

Per-unit discounts can:

- Reduce an item's price by a percentage of the original price. For example, 10% off.
- Reduce an item's price by a flat amount. For example, \$1 off.
- Set the per-unit price to a set amount. For example, \$5 per item.
- Set the price of the item to its cost price plus a set amount.
- Remove the tax of an item.

Per-line discounts can:

- Cap the total price for an item line to a predetermined amount. For example, the line total may be anything up to a maximum of \$10.
- Set the total price for an item line to a predetermined amount. For example, the line total is \$10.

A discount may also prompt the operator for a discount amount.

Note: The item and transaction discounts available and the item discount maximums are configured in the Portal.

Note: Special discounts such as some senior citizens or disability discounts make an item tax exempt. If a tax exempt discount is applied, the customer must supply their Senior Citizen or Tax Exempt ID during the tender process in order to receive the discount. The Point of Sale displays the discount as if from the normal tax-inclusive price.

Division

Divisions are top-level classifications for departments in your company. The Portal offers two kinds of divisions to support the Oracle financial interfaces: Reporting and Financial. Each department belongs to a single reporting division and a single financial division.

DSD

A DSD is an external supplier that is not part of your company. You may configure different rules and restrictions for direct suppliers than are used for the company warehouse. You can also restrict sites to use only warehouse suppliers and prevent them from ordering from direct suppliers.

Employee

An employee is a member of your company staff that you want to roster on to your staff schedule. Employees may or may not have access to Portal and Point of Sale systems.

Fashion

Fashion is the Portal feature that allows you to create variation of items, such as different colours, sizes and styles of the same item. The default labels of colour, size and style can be changed to something that suits your inventory.

Fixture

A fixture is a physical structure or area within your site that contains stock. This may include gondolas, counters, refrigerators, back-room receipt trolleys, tables, wall sections or any other area that regularly contains stock on your site. Fixtures are used primarily during stock take.

Group promotion

A group promotion is a promotion that applies to all items within a group that you define. A group promotion allows you to provide a free item or a discount for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

Group purchase order

A group purchase order is a purchase order that combines the requisitions from several sites into one purchase order. Stock levels can be allocated to each site during the creation of the order.

Inventory

The inventory is the Portal feature of maintaining all items that you offer for sale in your company.

Invoice

An invoice details an amount owed by an entity such as your company or a debtor, and the goods or services that incurred that cost. An invoice usually details the period of time by which it must be paid.

You can also receipt stock using an invoice. An invoice stock receipt automatically creates an invoice for that creditor in your Portal records, and allows you to record additional information such as delivery fees and discounts.

Inter-branch transfers (IBT)

An inter-branch transfer is a transfer of stock from one site within a company to another.

Item

An item represents a good or service provided by your organisation. Items are added to transactions in order to sell or return them. An item will include information about its:

- Barcode.

Note: An item can have more than one barcode.

- Description.
- Unit of measurement, for example an item may be sold by weight or as individual units.
- Price per unit of measurement.

Items also have additional information stored on the Portal, such as stock on hand, promotions and discount maximums.

Item options

Items can be modified with options to detail the customer's specific request. For example, a coffee order may contain soy milk or extra sugar. The options available for each item must be configured in the Portal.

Item variation

An item variation is an item that uses Fashion variations of colour, size and style. The default labels of colour, size and style may be renamed for your Portal configuration.

Journal

A journal is a unique code identifying a date, site and terminal for a transaction within the Portal.

Kit

A kit is an item that is made up of several other items in your inventory. The kit item itself does not have a stock-on-hand. Instead, when a kit item is sold, the stock-on-hand of the component items is decreased accordingly.

Label

A label is attached to an item and displays information about that item, such as the item's price, best before date and quantity, cooking or nutritional information, or a barcode. Labels can be printed via the Point of Sale.

Ledger

A ledger is a financial category or general ledger grouping that a transaction corresponds to for accounting purposes. For example, Expenses, Staff Salary, etc. The Portal uses a ledger for the Trail Balance Profit report. Your Portal may be configured not to use other ledgers.

Ledger type

A ledger type is a category or grouping of ledgers for accounting and reporting purposes, such as Income or Expenses. Your Portal may be configured not to use ledgers.

Line minimum

A line minimum is the minimum number of different items that must be in a transaction to trigger an effect, such as a promotion. Each unique item in a transaction creates its own line. Multiple units of the same item are recorded on the same line. A line minimum of 3 requires 3 unique items to be purchased.

Manufactured Kit

A manufactured kit is an item that is made up of several other items in your inventory. The kit item must be manufactured on site before it can be sold, and the stock-on-hand of the kit item is tracked by the Portal. When you manufacture a kit, the stock-on-hand of the component items is decreased and the stock-on-hand of the kit item is increased accordingly.

Matching

Matching is the process of linking a delivery docket receipt with a creditor invoice you have created in the Portal. Invoice-type stock receipts automatically create a creditor invoice and do not need to be matched.

Menu area

A menu area is a category of items designed to group items into meal types during table service. For example, coffees, mains, desserts. Menu areas control which modifier items can be applied to which prime items.

Modifier item

A modifier item is an item in your inventory that is used to add a modification to another item, such as adding 'soy milk' to a coffee. While modifier items can have costs and add to the price of the item they are modifying, they cannot be sold directly on the Point of Sale.

Open transaction

An open transaction is a transaction that has not yet been finalised. For example, a creditor invoice that has not been paid.

Operator

An operator is a staff member who uses the Point of Sale to process transactions or manage the cash drawer. Each operator is identified by a unique operator code and password that they use to log into the Point of Sale. Operator codes are unique to each site, but do not have to be unique within a company.

Pack

A pack represents the number of units that an item is supplied in. For example, you may sell cans of soft drink individually, but they are be ordered in packs of 24 from the supplier. This is different to a referral, where both the single can and the pack of cans are tracked in the inventory.

Pallet

A pallet is a set of cartons containing items that are grouped together as a specific collection so they can be tracked from supplier through to sale via barcodes. A pallet usually has a special barcode that encodes the number of cartons it contains, while each carton has a special barcode detailing the quantity of items it contains and their expiry dates.

Pallet barcodes may also be linked electronically to the carton barcodes.

Payment terms

Payment terms is the number of days after issuing an invoice that a creditor expects to be paid. Common payment terms are 21, 30, 60 or 90.

PDT

A PDT, or portable data terminal, is a small hand-held device with a touchscreen and an in-built scanner that can interact with the Portal to sell, order or count stock via the PDT software interface. PDTs are registered as terminals for a site, just as full Point of Sale terminals are, and require operators to log in to use them.

Portal Data Interchange (PDI)

The Portal Data Interchange (PDI) is a Portal feature that allows two separate companies that both use the AMC Convergent IT Portal to streamline their procurement process by automating the creation of customer orders and stock receipts between the companies.

Permission

A permission is a configuration that determines whether an operator is allowed to perform a specific task. For example, the ability to authorise purchase orders or change employee records may be restricted to certain individuals.

Portal operator

A Portal operator is someone with login credentials to your company's Portal. What a Portal operator can do depends on their permissions. A Portal operator cannot use their Portal login to log into the Point of Sale.

Point of Sale operator

A Point of Sale operator is someone with login credentials to your site's Point of Sale and PDTs. Depending on their permissions, they may have limited access to some Portal functionality through a PDT, but they cannot use their Point of Sale login to log into the Portal.

Point of Sale supervisor

A Point of Sale supervisor is a Point of Sale operator with some additional permissions to do things like authorise changes to the Point of Sale terminal, authorise gift voucher returns, or anything else that your Point of Sale configuration requires a supervisor's authorisation for. Their supervisor status is separate from any Portal permissions they may have. Depending on their permissions, they may have limited access to some Portal functionality through a PDT, but they cannot use their Point of Sale login to log into the Portal.

Price change

A price change updates the Portal with new prices for each price level of an item. Price changes can only be performed by operators with sufficient Portal privileges.

Price level

The Portal inventory system can store multiple price levels. For example, you may have one price level for retail customers and another for corporate or wholesale customers. The Point of Sale can be configured to use the appropriate price level when a debtor or customer is added to the transaction.

Prime item

A prime item is an item that can be sold normally through your Point of Sale. Most of the items in your inventory are likely to be prime items.

Procurement

The procurement system is the set of Portal features that manage and maintain the act of replenishing your stock levels, including managing creditors, contracts, requisitions, purchase orders, stock receipts, returns, adjustments and stock take.

Promotion

A promotion is a Portal feature which lets you create sophisticated rules to offer discounts, free items or rebates when the customer purchases a particular set of or combination of items. The Portal allows you to create promotions based on departments, suppliers, or your own custom item groups.

Promotion group

A promotion group is a group of items you define that either is used to trigger a promotion, or has the effects of the promotion applied to it. You can use the same group for multiple promotions.

Purchase order

A purchase order is a request to an individual supplier to purchase a set quantity of specific items. Purchase orders can be created manually, automatically created from finalised requisitions, or generated using procurement configurations.

Rebate

A rebate is an amount of money offered back to the customer by a supplier as an incentive to purchase. As opposed to a discount, special or promotion, where your company covers the lost profit from the price reduction, the supplier is responsible for reimbursing your company.

Rebate group

A rebate group is a collection of rebate item groups, used to easily control start and end dates of rebates.

Rebate item group

A rebate item group is a collection of rebate items, where each item has its rebate rules defined.

Receipt

A receipt is the printed record of a transaction, including the items, quantities and prices, any loyalty information, the tenders submitted and the operator, the terminal and date the transaction took place at.

Referral

A referral is a connection between two items in your inventory, where one is considered part of the other. For example, if your inventory tracks both individual cans of soft drink and crates of 24 cans, you can use a referral so that purchasing a single can (Selling item) depletes your stock of crates (Stock item) by 1/24th. This is different to using packs, as both individual cans and whole crates of items are tracked in your inventory.

Referred item

A referred item is an item that is depleted by the sale of another item. For example, if your inventory tracks both individual cans of soft drink and crates of 24 cans and sells the cans individually, the referred item is the crate of cans, which is depleted every time an individual can is sold. Referred items are also called Stock items in this documentation.

Requisition

A requisition is a list of items requested by a particular site. Each item is given a requested supplier, and all items are included in a single requisition, even if they are from different suppliers. Finalising a requisition can automatically open a purchase order for the appropriate suppliers. Requisitions from multiple sites may be combined into a group purchase order for a supplier, if your Portal is configured to permit group purchase orders.

Roster

A roster is a schedule of when specific staff members are supposed to work.

Sale minimum

A sale minimum is a minimum transaction amount used to trigger a promotion or other effect. For example, a sale minimum of \$10 requires that at least \$10 of items are purchased in a single transaction.

Selling item

A selling item is an item that uses a referral to track its stock levels on a different item. For example, if your inventory contains both individual cans of soft drink and crates of 24-cans, and your company sells the individual cans but tracks stock of the crates of 24 cans, then the individual can is the selling item.

Size

A size is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

Note: This should not be confused with an item's size as defined in the Details tab of Inventory Maintenance, which details how units of an item should be measured and sold.

Snap count

A snap count is a record of the stock-on-hand of an item or set of items at the time of the snap count, as tracked by the Portal. Snap counts are used for calculations and reporting.

Special

A special is a temporary reduced price given to a specific item for a period of time. Where a promotion applies to a group of items, a special applies only to an individual item.

Stock adjustment / write-off

A stock adjustment is a record of increasing or decreasing an item's stock-on-hand, with a reason. For example, stock was found after stock take, or stock has been damaged.

Stock item

A stock item is an item that is referred to by another item, to track the stock-on-hand. For example, if your inventory contains both individual cans of soft drink and crates of 24-cans, and your company sells the individual cans but tracks stock of the crates of 24 cans, then the crate of 24 cans is the stock item.

Stock on hand

Stock on hand is the number of units of a particular item a site currently has. It is updated automatically by stock receipting, transfers, adjustments and sales, and compared against stock take numbers to determine shrinkage.

Stock receipt

A stock receipt is the process of recording stock incoming from a supplier to a site. Stock receipts record the supplier, date, item and quantities, including any items that were received but not ordered, or items that were listed but not delivered. Stock receipts may use a delivery docket, which is a plain record of incoming stock, or an invoice, which creates a corresponding creditor invoice in the Portal to link with the stock receipt.

Stock return

A stock return is the process of returning stock to a supplier because it is faulty or otherwise unsuitable for sale. Stock returns record the date, item and quantity being returned and the reason for each item being returned.

Stock take

A stock take is the process of counting all units of stock at a particular site to obtain an accurate stock-on-hand level. Stock takes can either be continuous, where stock is counted while the site is still open for trading, or manual, where all stock is counted in a single session while the site is closed for trading.

Style

A style is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

Supplier

A supplier is a creditor from whom you purchase items in your inventory.

Supplier promotion

A supplier promotion is a promotion that applies to all items marked as purchased from a specific supplier. A supplier promotion allows you to provide a discount or supplier rebate for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

Terminal

A terminal is the tablet or other device that runs the Point of Sale. Each terminal is connected to the site via the base station, and is identified by a unique terminal number, which is recorded in every transaction made by the terminal.

Point of Sale Transaction

A Point of Sale transaction is an exchange of items, which represent goods or services provided by your organisation, for payment. Transactions include all the relevant information about the exchange:

- The date, time, site and location of the transaction.
- The operator who performed the transaction, and which terminal they used.
- The items purchased or returned and in what quantities.
- The amounts and types of payments provided, including any change or reimbursement provided to the customer or redeemed loyalty points.

Note: Transactions cannot be finalised until they balance. That is, the amount owed by the customer is zero, and any amount that has been overtendered has been issued as change.

- The loyalty number linked to the transaction, if applicable.

You can view what is currently included in the transaction in the Transaction list of the Point of Sale.

Note: In the Portal, a transaction also refers to an exchange of money, such as the payment of a creditor, or a debit adjustment.

Transaction line

A transaction line is an entry in the Transaction list that contains an item and its quantity. If more than one unit of an item is added to a transaction, the units are grouped into a single line. Actions such as price overrides, voids, discounts or refunds then apply to all units in the line.

Rewards card (i)	
Brian Smith	
Ch & Veg Stirfry 3.992kg N x \$7.99/kg	\$31.90
Gift Voucher recharge	\$50.00
Banana Muffin	-\$2.57
Coffee, Latte	\$3.42
Extra sugar	
Skinny Milk	
Rewards card discount	-\$3.27
Total:	\$79.48
Cash	\$50.00
Credit Card	\$34.10
Rounding	\$0.02
Change	\$4.60

Warehouse

A warehouse is a supplier that represents your company's central warehouse, used when sites order some or all of their inventory from Head Office rather than directly from external suppliers. You may configure different rules and restrictions for warehouse suppliers than are used for direct suppliers. You can also restrict sites to use only warehouse suppliers and prevent them from ordering from direct suppliers.