

How-To Guide Configuring Loyalty

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Introduction

The purpose of this guide is to show how to configure Loyalty that will enable the user to set up their own loyalty scheme and get customers to engage in it. This guide provides a foundational understanding of defining and configuring a new Loyalty Scheme, creating new customers, new customer loyalty accounts and issuing new loyalty cards. This will further enable the user to carry out loyalty-based transactions of loyalty customers such as capturing and redeeming points based on the Loyalty Scheme that had been configured.

Overview

This guide will cover the configuration for the following:

- **Loyalty Schemes Configuration** – Setting up loyalty tiers and the rules associated with them for loyalty-based transactions.
- **Role Configuration** – Enabling privileges and configuring the Sale and Tender menus to run Loyalty-based functions in the POS.
- **Customer Loyalty Configuration** – Setting up an IIN range, customer accounts, customer loyalty accounts and loyalty cards to carry out loyalty-based transactions based on the Loyalty Scheme configuration.
- **Capturing of Loyalty Points** – Using a loyalty customer to earn points from a basic sales transaction.
- **Redeeming of Loyalty Points** – Using the available points of a loyalty customer as a tender option.

Configuration Steps

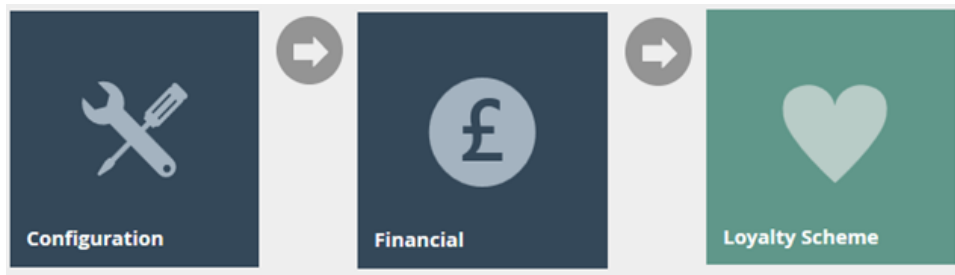
The Loyalty Scheme Configuration function provides the option to create Loyalty Schemes that allow users to define different Loyalty Tiers and the rules associated with them when carrying out loyalty-based transactions. At what rate do loyalty customers earn loyalty points, at what rate are the points redeemed, what promotion strategy is used for calculation of loyalty and after how many points or total value spent would the customer be able to advance to the next Tier, are examples for some rules that are configured in the Loyalty Scheme.







Loyalty Schemes are associated with individual customer loyalty accounts and the POS terminal. A diverse number of Loyalty Schemes may be defined based on the requirements.

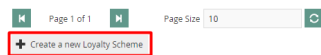
Create a new Loyalty Scheme

To create a new Loyalty Scheme, follow the below steps.

The Loyalty Scheme Maintenance application can be accessed through:
Configuration -> Financial -> Loyalty Scheme



Loyalty Scheme Maintenance		
<div> <div>Scheme ID</div> <div>Starts With</div> <div></div> <div>Hide</div> </div> <div> <div>Apply Filters</div> <div>Reset Filters</div> </div>		
	Scheme ID	Name
  	LOYALTY_UK	Loyalty Scheme UK
  	LOYALTY_US	Loyalty Scheme US



To create a new Loyalty Scheme, select **Create a new Loyalty Scheme** on the Loyalty Scheme Maintenance page.

Enter a unique **Scheme ID** for the new Loyalty Scheme. The ID can be alphanumeric and contain a maximum of 20 characters and will be used to uniquely identify this new Loyalty Scheme.

Loyalty Scheme Maintenance

Please enter following details for the new Loyalty Scheme

Scheme ID

LOYALTY_ALL

← Back

+ Create

Select **Create**.

Loyalty Scheme – General Tab

The General tab is the most important in configuring the Loyalty Scheme where the Name, Tier Promotion Strategy and Loyalty Tiers are defined.

Loyalty Scheme Maintenance

Save Cancel

You are editing Loyalty Scheme ID: 'LOYALTY_ALL'

General Reward Thresholds Progress Rewards Calendar Auto Generate

Name* Loyalty Scheme - All

Tier Promotion Strategy* Points Balance

Calculate In Tier Currency ☐

Loyalty Tiers

	Tier Code	Name	Default Customer Price Group	Currency ID	Points Rate	Redeem Points Rate	Points Threshold
+ Add	Bronze						

* Denotes Mandatory

This will navigate the user to the **Loyalty Scheme Maintenance** of the new Loyalty Tier that was just added.

Loyalty Scheme – Loyalty Tier – General Sub-tab

In the **General Tab**, enter a name for this Loyalty Tier for which (optionally) a Default Customer Price Group can be selected if required.

Different values for the Loyalty Tier are to be configured for each column as shown below:

Loyalty Scheme Maintenance

Save Cancel

You are editing Loyalty Tier ID: 'Bronze' for Loyalty Scheme ID: 'LOYALTY_ALL'

General Benefits

Name* Bronze

Default Customer Price Group

Loyalty Tier Items

	Currency ID	Points Rate	Points Reward	Redeem Points Rate	Points Threshold	Points Alert Threshold	Spend Threshold	Spend Alert Threshold
+ Add	Pounds Sterling	100	0	1.0	0	0	0	0

The following table details the properties of Loyalty Tier Item:

Configuration	Description
Currency ID	Select from a dropdown list of configured Currencies. This identifies the association with a specific Currency.
Points Rate	Specify the number of basic units of the applicable currency (Eg: If Pounds Sterling, then pence) required to accrue one Point to the Customer Loyalty Account. (Eg: 100 yields One Point per Pound, 50 yields Two Points per Pound).
Points Reward	Specify the number of Loyalty Points accrued to the Customer Account per Transaction.

Redeem Points Rate	Specify the number of Loyalty Points to redeem to contribute one basic unit of the applicable currency (Eg: One Penny).
Points Threshold	Specify the number of Points accumulated in Total required for Promotion to the next Tier.
Points Alert Threshold	Specify the number of Points accumulated in Total at which the Customer may be alerted of imminent Promotion to the next Tier.
Spend Threshold	Specify the amount of Total Spend accumulated by the Customer required for Promotion to the next Tier.
Spend Alert Threshold	Specify the amount of Total Spend accumulated by the Customer at which the Customer may be alerted of imminent Promotion to the next Tier.

The values will be added as follows for the below example:

- **100 for Points Rate** which sets this Bronze Tier to award 1 loyalty point for each 100 pence spent.
- **1 for Redeem Point Rate** which sets this Bronze Tier to be able to redeem points at a rate where 1 loyalty point is equal to 1 penny.

Enter the appropriate values to the new Loyalty Tier and select **Add**.

Loyalty Scheme Maintenance

Save Cancel

You are editing Loyalty Tier ID: 'Bronze' for Loyalty Scheme ID: 'LOYALTY_ALL'

General Benefits

Name: Bronze

Default Customer Price Group: -

Loyalty Tier Items

	Currency ID	Points Rate	Points Reward	Redeem Points Rate	Points Threshold	Points Alert Threshold	Spend Threshold	Spend Alert Threshold
	Pounds Sterling	100	0	1.0	0	0	£0.00	£0.00
	Afghani Afghani	0	0	0.0	0	0	AF40.00	AF40.00

Select **Save**.

The new Bronze Tier has been successfully added to the Loyalty Scheme as shown below:

Loyalty Scheme Maintenance

Save Cancel

You are editing Loyalty Scheme ID: 'LOYALTY_ALL'

General Reward Thresholds Progress Rewards Calendar Auto Generate

Name* Loyalty Scheme - All

Tier Promotion Strategy* Points Balance

Calculate In Tier Currency ☐

Loyalty Tiers

	Tier Code	Name	Default Customer Price Group	Currency ID	Points Rate	Redeem Points Rate	Points Threshold
	Bronze	Bronze		Pounds Sterling	100	1.0	0
+ Add							

* Denotes Mandatory

More Tiers can be added to the Loyalty Scheme using the same method as above and will display multiple tiers as shown below:

Loyalty Scheme Maintenance

Save Cancel

You are editing Loyalty Scheme ID: 'LOYALTY_ALL'

General Reward Thresholds Progress Rewards Calendar Auto Generate

Name* Loyalty Scheme - All

Tier Promotion Strategy* Points Balance

Calculate In Tier Currency ☐

Loyalty Tiers

	Tier Code	Name	Default Customer Price Group	Currency ID	Points Rate	Redeem Points Rate	Points Threshold
	Bronze	Bronze		Pounds Sterling	100	1.0	0
	Silver	Silver		Pounds Sterling	100	1.0	200
	Gold	Gold		Pounds Sterling	50	0.5	1000
+ Add							

* Denotes Mandatory

Note: The values of the Points Threshold column are different for each Tier, as it is necessary for the customer to have that required number of points for them to be able to qualify for the next Tier. Also, note that the Points Rate and Redeem Points Rate are different in the Gold Tier since the customers in a higher loyalty Tier should be having more benefits.

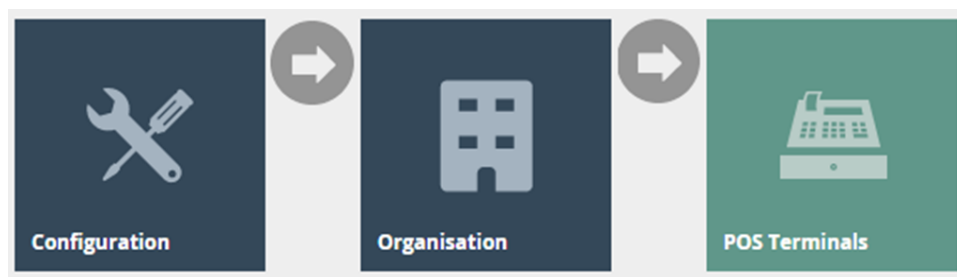
Select **Save** to successfully add the new Loyalty Scheme.

Broadcast the Loyalty Scheme entity to the applicable device(s) to use this new Loyalty Scheme.

Configure Loyalty Scheme in the POS terminal

There are Loyalty-based configurations that can be made in the POS terminal to increase the efficiency of using Loyalty-based functions in the POS. To configure the POS terminal with Loyalty Scheme configurations can be added to the POS terminal in the POS Terminal Maintenance application.

The POS Terminal Maintenance application can be accessed through:
Configuration -> Organisation -> POS Terminals



In the POS Terminal Maintenance page, select the **Edit** icon of the desired POS Terminal.

POS Terminals – Loyalty Tab

POS Terminal Maintenance

Save Cancel

You are editing POS terminal for device ID 'mpos7@0001.enactor' at store 'Enactor Store' based on template 'Standard Mobile POS Terminal Template'

General Peripherals Printing Day Start Day End User Interface Tax Online Auth **Loyalty** Groups External Attributes Tendering

Loyalty Customer Process Loyalty Process

Default Loyalty Scheme: Loyalty Scheme UK 1

Default Loyalty Tier Code: Bronze 2

Prompt for Loyalty at Start of Transaction ☐ 3

Prompt for Loyalty at Total Pressed ☒ 4

Offer Loyalty Card ☒ 5

Stored Customer Transaction Age (Hours): 0 6

Loyalty Claim Validity Period (in days): 0 7

Use Template Value

☐

☐

☒

☐

☐

☒

☐

Set the appropriate values on the **Loyalty** tab as follows:

Configuration	Description
Default Loyalty Scheme	Select the desired Loyalty Scheme from the dropdown list selection of defined Loyalty Schemes.
Default Loyalty Tier Code	Select the desired Loyalty Tier Code from the dropdown list selection of defined Loyalty Tier Codes. These are defined in Loyalty Scheme Maintenance.
Prompt for Loyalty at Start of Transaction	Select checkbox, to prompt the operator to enter loyalty information, at the start of a transaction for loyalty capture on this POS Terminal.
Prompt for Loyalty at Total Pressed	Select checkbox, to prompt the operator to enter loyalty information, at the Total Pressed stage of a transaction for loyalty capture on this POS Terminal.
Offer Loyalty Card	Select checkbox, indicate that a Loyalty card should be offered at the Total Pressed stage of a Transaction, if there is no Loyalty Customer captured.

Select **Save**.

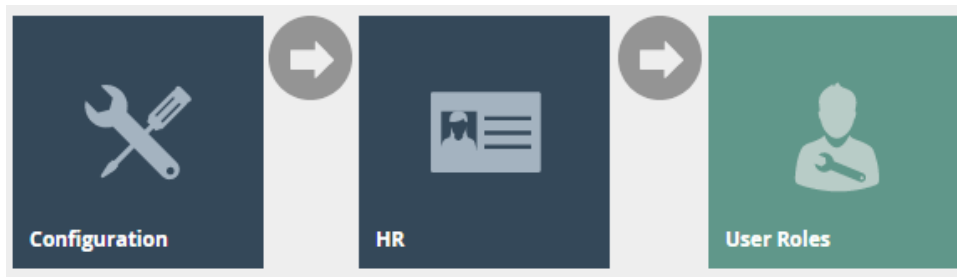
Broadcast the **POS Terminal entity** to the desired device(s) to use the above Loyalty functions on POS.

Role Configuration

For the users of Loyalty functions, specific Loyalty-based privileges and menu configurations must be configured to access the Loyalty functions in the POS. This section lists the privileges and menu functions that are specific to Loyalty.

Privileges Configuration

The User Role Maintenance application can be accessed through:
Configuration -> HR -> User Roles



In the User Role Maintenance, select the **Edit** icon of the desired User to enable the privilege for.

Navigate to the **Authorised Functions** tab of that selected User and apply the following filters:

Application Package > Enactor POS

Function ID > Contains, loyalty

The screenshot shows the 'User Role Maintenance' application interface. The 'Authorised Functions' tab is selected. The filters applied are: Application Package: Enactor POS, Function ID: Contains, loyalty. The table below lists the functions that match these criteria.

Package	Process	Function ID	Function Name	
<input checked="" type="checkbox"/>	Enactor POS	Add Loyalty Points	enactor.pos.AddLoyaltyPointsAllowed	Add Loyalty Points Allowed
<input checked="" type="checkbox"/>	Enactor POS	Add Loyalty Points	enactor.pos.AuthorisesAddLoyaltyPoints	Authorises Add Loyalty Points
<input type="checkbox"/>	Enactor POS	Capture Loyalty Account	enactor.pos.DisallowLoyaltyCardOverwipe	Disallow a user from overwiping a loyalty card.
<input checked="" type="checkbox"/>	Enactor POS	Capture Loyalty number and get loyalty information	enactor.pos.ShowLoyaltyNameSearch	Show Loyalty Name Search Button
<input checked="" type="checkbox"/>	Enactor POS	Capture Loyalty number and get loyalty information	enactor.pos.ShowLoyaltyPostcodeSearch	Show Loyalty Postcode Search Button
<input type="checkbox"/>	Enactor POS	Capture Name	enactor.pos.DisallowCaptureNameSearchLoyalty	Disallow Search By Loyalty
<input type="checkbox"/>	Enactor POS	Claim Customer Loyalty Points	enactor.pos.AuthoriseClaimLoyaltyPoints	enactor.pos.AuthoriseClaimLoyaltyPoints
<input type="checkbox"/>	Enactor POS	Claim Customer Loyalty Points	enactor.pos.ClaimLoyaltyPointsAllowed	enactor.pos.ClaimLoyaltyPointsAllowed
<input checked="" type="checkbox"/>	Enactor POS	Customer Loyalty Account Enquiry	enactor.pos.AuthorisesCustomerLoyaltyEnquiry	Authorises Customer Loyalty Enquiry
<input checked="" type="checkbox"/>	Enactor POS	Customer Loyalty Account Enquiry	enactor.pos.CustomerLoyaltyEnquiryAllowed	Customer Loyalty Enquiry Allowed

This lists the privileges that are required to access some of the Loyalty-based functions:

Package	Process	Function ID	Function Name
Enactor POS	Add Loyalty Points	enactor.pos.AddLoyaltyPoints Allowed	Add Loyalty Points Allowed

Enactor POS	Add Loyalty Points	enactor.pos.AuthorisesAddLoyaltyPoints	Authorises Add Loyalty Points
Enactor POS	Claim Customer Loyalty Points	enactor.pos.ClaimLoyaltyPointsAllowed	enactor.pos.ClaimLoyaltyPointsAllowed
Enactor POS	Claim Customer Loyalty Points	enactor.pos.AuthoriseClaimLoyaltyPoints	enactor.pos.AuthoriseClaimLoyaltyPoints
Enactor POS	Display Loyalty Account	enactor.pos.AllowLoyaltyDetailsPrint	Allow loyalty details print
Enactor POS	Do Capture Loyalty Account	enactor.pos.VoucherRedeemInCaptureLoyaltyAllowed	Redeem Customer Voucher in Capture Loyalty Allowed
Enactor POS	Issue New Loyalty Card	enactor.pos.LoyaltyGenerateCardNumberAllowed	enactor.pos.LoyaltyGenerateCardNumberAllowed
Enactor POS	Issue New Loyalty Card	enactor.pos.LoyaltyIssueNewCardAllowed	Issue New Loyalty Card Allowed
Enactor POS	Issue New Loyalty Card	enactor.pos.AuthorisesLoyaltyIssueNewCard	Authorises Issue New Loyalty Card
Enactor POS	Loyalty Account Tender	enactor.pos.LoyaltyAccountTenderAllowed	Loyalty Account Tender Allowed
Enactor POS	Loyalty Account Tender	enactor.pos.AuthorisesLoyaltyAccountTender	Authorises Loyalty Account Tender

Ensure that the selected User has the required privileges enabled by ticking on the necessary functions that are listed.

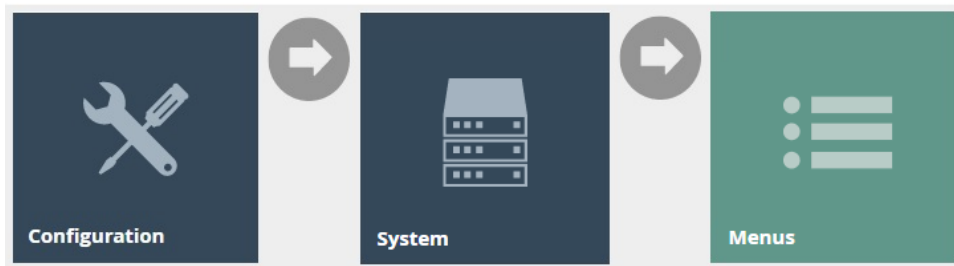
Select **Save**.

Now the user will be able to carry out all Loyalty-based functions in the POS.

Menu Configuration

To run the Loyalty-based functions in the POS, the menu should be configured with the functions that are required by the user.

The Menu Maintenance application can be accessed through:
Configuration -> System -> User Roles



Select the appropriate menu (E.g., Sales Menu) that the Loyalty-based functions are to be added.

Loyalty Basic Menu Functions

The basic functions of Loyalty can be configured in the existing Sales menu by adding a new folder named **Loyalty** and configuring the menu functions as required under this folder. Following is an example of a configured Sales Menu which contains all the basic Loyalty functions:

Menu Maintenance

Save
Cancel

You are editing menu ID SALE for menu set POS, role Sales Assistant, menu group Default Standard POS, locale -

Name SALE

Menu Type Tree ▼

Menu Category Retail ▼

SALE

- 1 - Sales
 - 1 - Orders
 - 2 - Customers
 - 3 - Loyalty**
 - 1 - Capture Loyalty
 - 2 - Loyalty Account Enquiry
 - 3 - New Loyalty Account
 - 4 - Add Loyalty Points
 - 8 - Back
 - 4 - Gift Cards
 - 5 - Receipts
 - 6 - QTY Sale
 - 7 - More
 - 8 - Back
- 2 - Dept Sale
- 3 - Voids
- 4 - Returns
- 5 - Discount / Overrides
- 6 - Management
- 7 - SignOff

Following is an example of the **Customer Loyalty Account Enquiry** event of this menu:

Menu Maintenance

Save Cancel

You are editing a button on 'SALE:SALES:MORE:LOYALTY'. Please update the button details

General
Data

Type
☒ Event ☐ Menu Link

Event*
Customer Loyalty Account Enquiry

ID*
CustomerLoyaltyAccountEnquiry

Button Label
Loyalty Account Enquiry

Button Message Id

Button Message Base


Image URL

Pressed Image URL

Visibility Expression
#{priv:checkPrivilege('enactor.pos.CustomerLoyaltyEnquiryAllowed')}

Enabled Expression

Button Style

☐


Background Colour

Following are the details of the Loyalty-based events that can be configured:

Event Name	Description	Privileges
Capture Loyalty	Allows the user to capture the customer as a Loyalty customer in the current transaction.	No privileges are required.
Customer Loyalty Account Enquiry	Allows the user to enquire the details of an existing customer Loyalty account.	enactor.pos.CustomerLoyaltyEnquiryAllowed
New Loyalty Account	Allows to user to create a new Customer Loyalty account using the POS.	enactor.pos.LoyaltyIssueNewCardAllowed
Add Loyalty Points	Allows to manually add Loyalty Points, for the current transaction using the POS, using the "Add Loyalty Points" reasons that have been configured.	enactor.pos.AddLoyaltyPointsAllowed



The usage of some of these events is demonstrated in latter sections of this guide.

Loyalty Tender Menu Functions

Redemption of Loyalty points can be done as a Tender option in the POS by configuring the Tender menu. Before making configurations in the menu itself, a Tender for this purpose must be configured. Configuring Tenders is covered in a separate How-to guide. Once a Tender is configured, navigate to the Menu Maintenance application, and select the Tender menu that you wish to add the Loyalty tender option to.

Following is an example of a configured Tender Menu which contains Customer Loyalty:

Menu Maintenance


 Save  Cancel





You are editing menu ID TENDER for menu set POS, role Sales Assistant - UK, menu group Fashion, locale English (UK)

Name

Menu Type

Menu Category

 **TENDER**

- 1 - Cash
- 2 - Cards
- 3 - Cheque
-  4 - Vouchers
-  5 - Customers
 - 1 - Credit Account
 - 2 - Deposit Account
 - 3 - Loyalty Account**
 - 8 - Back
-  6 - Foreign Currencies
-  7 - More
 - 8 - Back

Following is an example of the **Loyalty Account** event of this menu:

[illegible]

To do this, click on the Data tab of the Loyalty Account Tender button and select from the dropdown the Loyalty Tender that has already been configured in the Tender Maintenance and click on Add as follows:

Menu Maintenance

Save

Cancel

You are adding a new button to 'TENDER'. Please fill in the button details

General

Data

Data

	Name	Value
	Tender ID	<div>LA_ALL</div> <div>Loyalty Account All (LA)</div>
<div>+ Add</div>	<div>-</div>	

Note: Make sure that the “enactor.pos.LoyaltyAccountTenderAllowed” privilege has been assigned to the user to allow Loyalty Account Tender.

The usage of this menu event is demonstrated in a latter section of this guide.

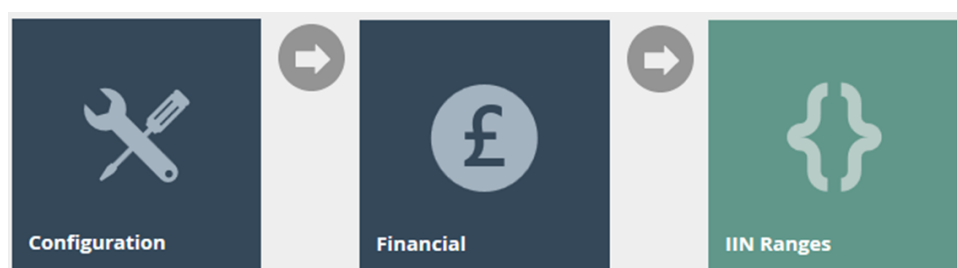
Customer Loyalty Configuration

To use the Loyalty Scheme that was configured, a customer, a customer loyalty account and a customer loyalty card must be created. Before creating a customer loyalty card, the IIN range for the customer loyalty card must be configured to ensure that the card is identified as a loyalty card which is associated with the loyalty scheme created.

Create a new IIN Range

To create a new IIN Range follow the below steps:

The IIN Range Maintenance application can be accessed through:
Configuration -> Financial > IIN Ranges



The screenshot shows the 'IIN Range Maintenance' application. At the top, there are filter fields for 'Range Start' and 'Range End', each with a 'Starts With' dropdown and an input field. Below these are fields for 'Minimum PAN Length' and 'Maximum PAN Length'. There are 'Apply Filters' and 'Reset Filters' buttons. The main part of the interface is a table with the following columns: Range, PAN Length, Card Type, and Card Type Description. The table contains seven rows of data. At the bottom, there is a pagination bar showing 'Page 1 of 1' and 'Page Size 10'. A red box highlights a button labeled 'Create a new IIN Range'.

	Range	PAN Length	Card Type	Card Type Description
	1011-1011	8		Gift Card US
	1012-1012	8		Loyalty US
	1013-1013	8		Customer Account US
	1441-1441	8		Gift Card UK
	1442-1442	8		Loyalty UK
	1443-1443	8		Customer Account UK
	5678-5678	8		Gift Card US

To create a new IIN Range, select **Create a new IIN Range** on the IIN Range Maintenance page.

Enter a **Start** and **End IIN Range** for the new customer loyalty card which will be a fixed value that indicates what type of card.

Enter the **Minimum** and **Maximum PAN Length** of the card.

According to the following configurations set, the card starting with the four digits “1212” and has a length of 8 digits is considered as a Customer Loyalty Card.

E.g.: 12120001

IIN Range Maintenance

You are adding a new Range, please enter the details below:

Range Start	1212
Range End	1212
Minimum PAN Length	8
Maximum PAN Length	8

[← Back](#) [+ Create](#)

Select **Create**.

IIN Range – General Tab

The General tab captures the basic information of the new IIN Range.

IIN Range Maintenance

[Save](#) [Cancel](#)

You are editing Range 1212-1212 for PAN length 8.

General	Track Data	Applicable Cards
Card Description*	Loyalty All	1
Issuer Description	Loyalty All	2
Payment Card Type	-	
Second Payment Card Type	-	
Embossed Digit Group Lengths (e.g. 4,6,12)		
No LUHN Check Digit	<input checked="" type="checkbox"/>	3
Expiry Date Limit Check	<input type="checkbox"/>	
Country	United Kingdom	4
Currency	Pounds Sterling	5

* Denotes Mandatory

Set the appropriate values on the **General** tab as follows:

Configuration	Description
Card Description	Enter a User-Friendly, meaningful description by which to identify the Card Range in other locations of the Estate Manager. Maximum 40 alphanumeric characters.
Issuer Description	Enter a User-Friendly identification of the Card Issuer. Maximum 40 alphanumeric characters.
No LUHN Check Digit	Checkbox, if true indicates that no LUHN check should be applied to this IIN Range (Last digit must otherwise conform to LUHN Check calculation).
Country	Select from a dropdown list of all configured Countries.

Currency	Select from a dropdown list of all configured Currencies.
----------	---

IIN Range – Track Data Tab

The **Track Data** Tab is used to configure how the data of the card is to be read.

Enter the value 2 for the Track Field, the PAN Length for the Length field and tick the Keyable option as shown below:

	Track	Start	Length	Keyable
PAN Attributes	2	0	8	<input checked="" type="checkbox"/>
Expiry Date Attributes	0	0	0	<input type="checkbox"/>
Start Date Attributes	0	0	0	<input type="checkbox"/>
Months Valid Attributes	0	0	0	<input type="checkbox"/>
Issue Number Attributes	0	0	0	<input type="checkbox"/>
Service Code Attributes	0	0	0	<input type="checkbox"/>
Custom Attributes 1	0	0	0	<input type="checkbox"/>
Custom Attributes 2	0	0	0	<input type="checkbox"/>
Custom Attributes 3	0	0	0	<input type="checkbox"/>
Custom Attributes 4	0	0	0	<input type="checkbox"/>

IIN Range – Applicable Cards

The **Applicable Cards** Tab is used to configure the card related configurations for this IIN Range.

Make sure to tick on the Loyalty Card and Online Update checkboxes as shown below:

Payment Card	<input type="checkbox"/>
Cheque Card	<input type="checkbox"/>
Loyalty Card	<input checked="" type="checkbox"/> 1
External Loyalty Provider	<input type="checkbox"/>
Online Update	<input checked="" type="checkbox"/> 2
Loyalty Scheme	-
Tier Code	
ETop Up Card	<input type="checkbox"/>
ETop Up Product ID	
ETop Up Product Group ID	
Gift Card	<input type="checkbox"/>
Gift Card Type	-

Set the appropriate values on the **Applicable Cards** tab as follows:

Configuration	Description
---------------	-------------

Loyalty Card	Select checkbox, to enable the card for use as a Loyalty Card.
Online Update	Select checkbox, to enable online update of loyalty accounts. It defaults to true.

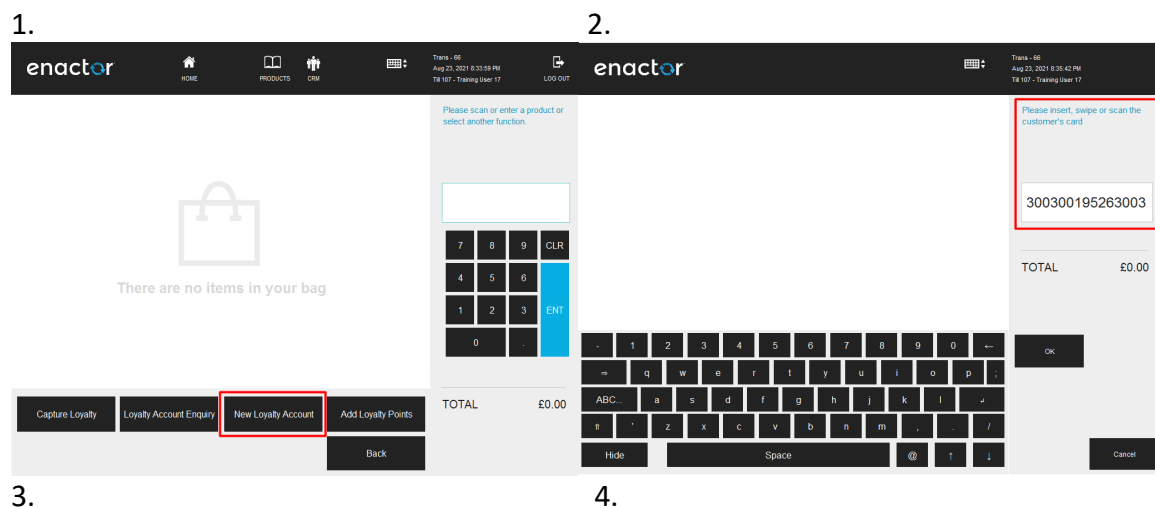
Select **Save** to successfully add the new IIN Range.

Broadcast the **IIN Range entity** to the desired device(s) to use this new IIN Range to create new Customer Loyalty Cards.

Create a new Customer, Customer Loyalty Account and Customer Loyalty Card

Following setting up a loyalty scheme and an IIN range for the customer loyalty card, a customer, a customer loyalty account, and a customer loyalty card must be created. This can be done on the New Loyalty Account function in the POS:

1. Navigate to Sales -> More -> Loyalty and use the **New Loyalty Account** function in the menu.
2. **Enter a new Customer Loyalty Card number** which is within the IIN range that has been configured in the previous section (Eg:12120001, 12120002) This will be the new loyalty card that will be issued for the new loyalty customer and will be associated with both the new customer account and the customer loyalty account.
3. **Enter the basic identification details** of the new customer account and select **OK**.
4. **Enter the address details** of the new customer account and select **OK**.



5. **Enter the contact details** of the new customer account and select **OK**.
6. At this stage, the right loyalty scheme must be selected in association with this new customer account to a new customer loyalty account. Select the **Loyalty Scheme** and the **Loyalty Tier** to be applied to this customer and select **OK**.
7. If the new customer, customer loyalty account and the loyalty card have successfully been created; the loyalty customer's details will be displayed as shown below:

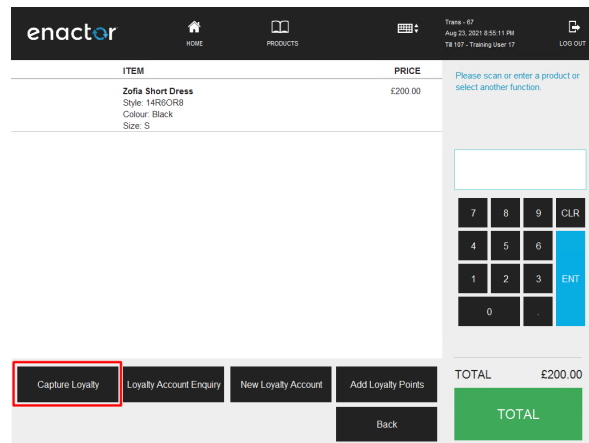
This new Loyalty Customer is now ready to carry out Loyalty-based transactions such as capturing and redeeming of Loyalty points.

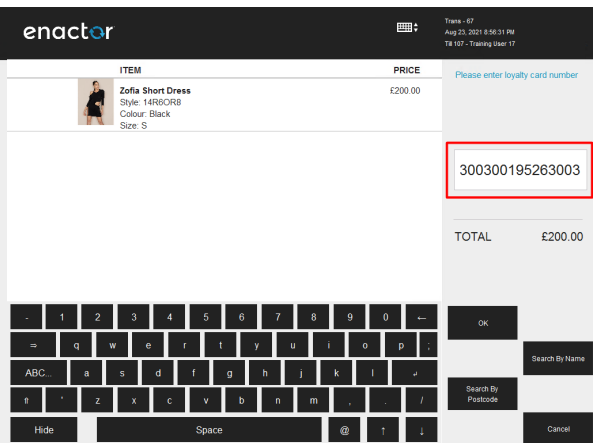
Capturing of Loyalty Points

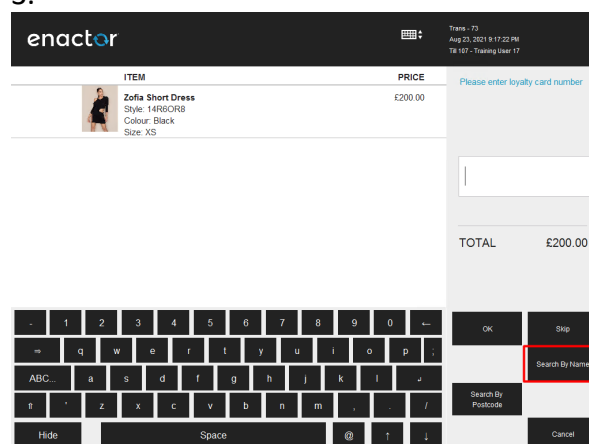
Once a new customer is created who is associated to both a customer loyalty account and a loyalty card, sales transactions can be performed to capture loyalty points based on the Loyalty Scheme defined. Following steps describe of how to execute this using the POS:

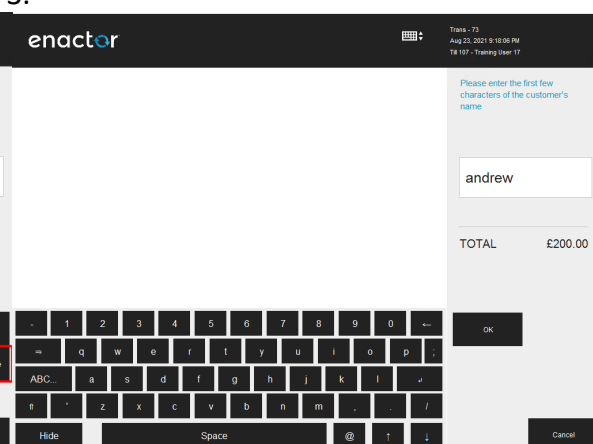
Before or after adding products to the basket, the loyalty customer must be added to captured loyalty points.


1. Navigate to Sales -> More -> Loyalty and use the **Capture Loyalty** function in the menu.
2. The user will be prompted to enter a loyalty card number. **Enter the loyalty card number** and select **OK**.
3. Alternatively, select the **Search By Name** button.
4. The following screen will be displayed to confirm the Loyalty account. Select **OK** to confirm.
5. If the Loyalty account is successfully added, and it is ready for capture, the loyalty customer's details will be displayed along with the points earned from the products in the basket.

1. 

2. 

3. 

4. 

5. 

6. Select **Total** and complete the tender of this transaction. The customer loyalty account details will also be visible in the receipt as shown below:

This is another way to verify that the captured loyalty customer has points added to their loyalty account based on the loyalty scheme configured.

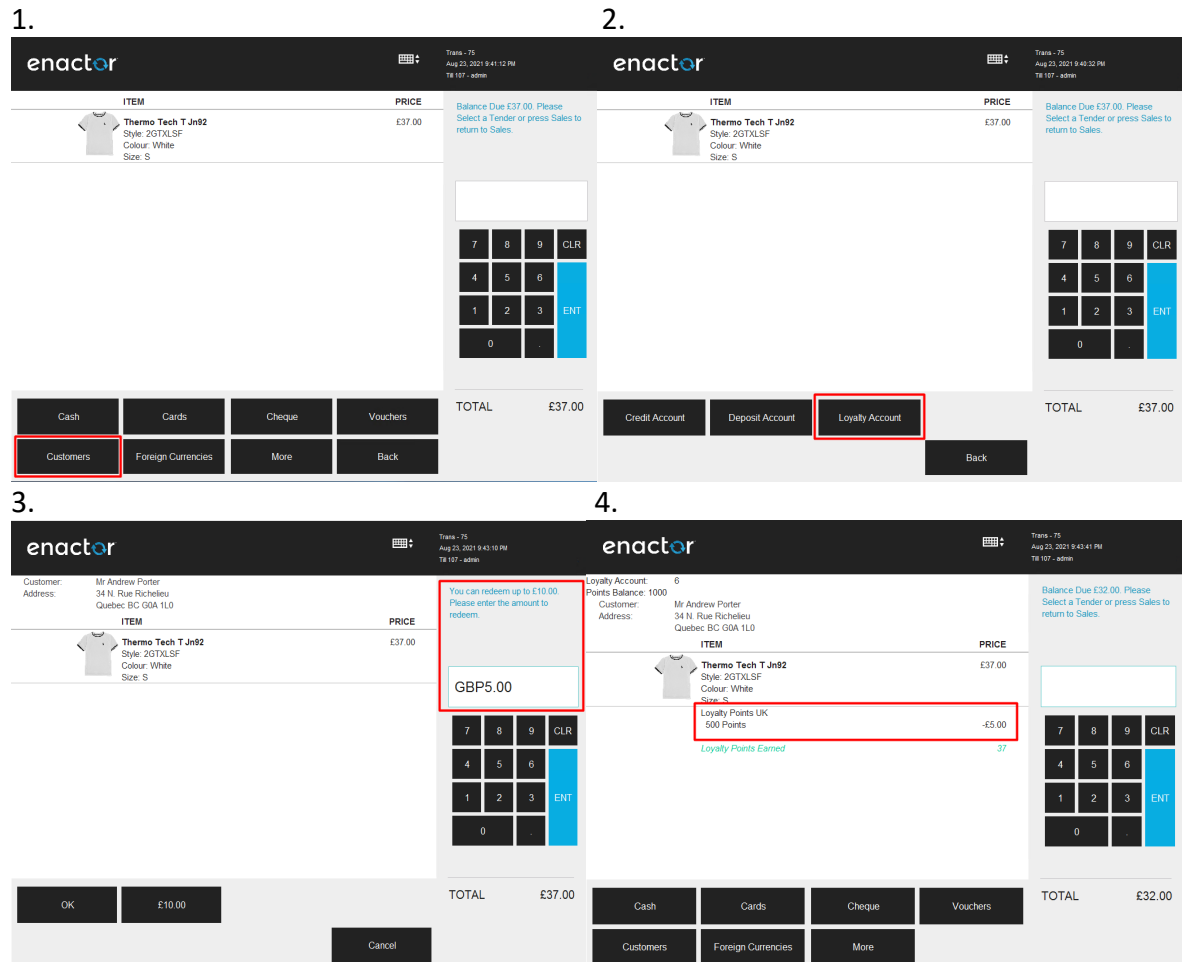
Redeeming of Loyalty Points

After Loyalty Customers have earned points to their Loyalty Accounts, they are able to redeem their available points as a tender option to pay for transactions. The rate at which these points can be redeemed is configured in the Loyalty Scheme that is defined. Following are the steps to redeem loyalty points during a transaction in the POS:

1. After adding the products to the basket, select on the **Total** function to navigate to the Tender menu. The available tender options will be displayed as shown below. Select **Customers**.
2. Select the **Loyalty Account** button to select the loyalty account that the user wishes to redeem points from.
3. The user will then be asked to enter a loyalty card number. **Enter the loyalty card number** or **Search by Name** as done when Capturing Loyalty. Select **OK**. The user will

then be navigated to a screen that will request for the amount that the customer wishes to redeem from the loyalty account. **Enter the amount** the customer wishes to redeem and select **OK**.

- If the loyalty account and redeemed the point have been successfully added, the loyalty customer's details will be displayed along with the points redeemed.



- Once Cash or any other tender option is selected to complete the tender of this transaction, the customer loyalty account details will also be displayed in the receipt as shown below:

```

Hertford
Hertfordshire
SG14 1PB
Tel: 01992 500881

Sale
-----
Customer: Andrew Porter
Quebec
GOA 110
BC
Tel: 4268877423
Thermo Tech T Jn92          £37.00
Style: 2GTXL5F
Colour: White
Size: S

TOTAL                      £37.00

Loyalty Points UK          -£5.00
500 Points

Cash UK                     -£32.00
Loyalty Account: 6
Loyalty Balance: 1,000
You earned a total of 37 loyalty points
You used a total of 500 loyalty points
New Loyalty Balance: 537
Auth User: admin

00010107000752108232121220

Thankyou for shopping at Enactor
23/08/21 21:44 Training User 17 0001 0107 0075

```


This is another way to verify that the points have been redeemed from the customer loyalty account based on the loyalty scheme configured.

About This Document

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The amendment history of this document can be found in the table below.

Current Document Version information

Document Context

This document is part of the Enactor Product Documentation Series. All Enactor products include a comprehensive documentation set designed to improve understanding of the product and facilitate ease of use.

Document Inquiries

At Enactor we aspire to producing the highest quality documentation to reflect and enhance the quality of our product. If you find that the document is inaccurate or deficient in any way, please assist us in improving our standard by letting us know.

For matters of document quality or any other inquiries regarding this document please contact:

By Email: documentation@enactor.co.uk

Document History

The following versions of the document have been produced:

VERSION	STATUS	ISSUE DATE	AUTHOR	REASON FOR ISSUE
1.0	Initial Draft			Initial version
1.0	Review			Reviewed Document