Getting Started

The Loyalty Box

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Welcome to The Loyalty Box

The Loyalty Box is a powerful set of tools that allows you to manage your loyalty programs. This guide will help you get your first loyalty program up and running. We will also provide some helpful tips along the way to guide you through the various decisions you will make when setting up your program.

In this guide you are going to learn how to:

1. Setup your location(s)
2. Create a program: Loyalty; Gift Card or any other type.
3. Create or Import your cards
4. Add rules: % cash-back; points; coffee’s etc

5. Add Users & Employees
6. Launch your program to the world
7. Access additional guides

If you have questions that are not covered by this guide, please contact our customer care agents on support@theloyaltybox.com.

Start your engines!

Some Hints:

When you see something like this:

Clients > Locations > Terminals

It means, we want you to roll your mouse over the “Clients” tab in the navigation and then the “Locations” tab and then **click** on the “Terminals” tab.

Setup your Location(s)

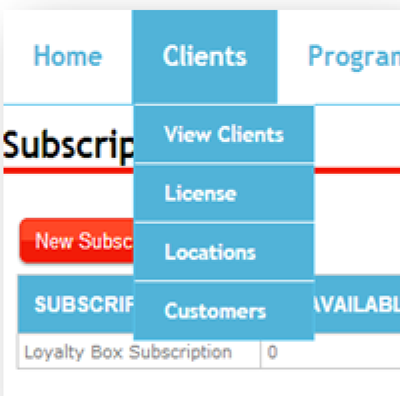
The first thing you are going to do, after signing up of course, is setup your location. A *location* could be considered as anyone of the following things:

1. Your physical store(s): If you are a retailer in a shopping complex or maybe you have many stores, like a franchise.
2. Your Business: If you sell products/services to other businesses
3. Your Website: If you are an online retailer
4. Anywhere where you are: Perhaps you are a consultant and you move around

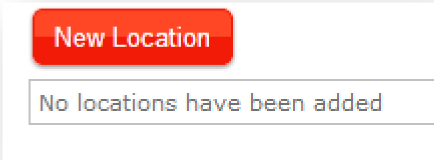
Think of a location as the place a customer would interact with you. You would typically add a location for every store that you own.

Step 1: Setup your Location:

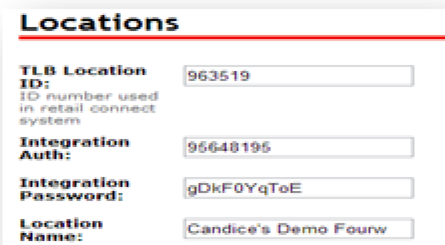
1. Roll your mouse over Clients, then click on the Locations tab.



2. Then select “New Location”



3. Your location will automatically be issued the following: (You don’t need to touch these, but they are explained below)
    a. Location ID: This is the unique location ID that is given to this store. Each location will be given a unique ID. You will use this ID when you log in to your web terminal. (Note: TLB is short for The Loyalty Box”, just in case you're wondering)
    b. Integration Auth: This is a fancy code used for your Point of Sale integration (If you are integrating The Loyalty Box into your POS system)
    c. Integration Password: A password used for your Point of Sale integration.

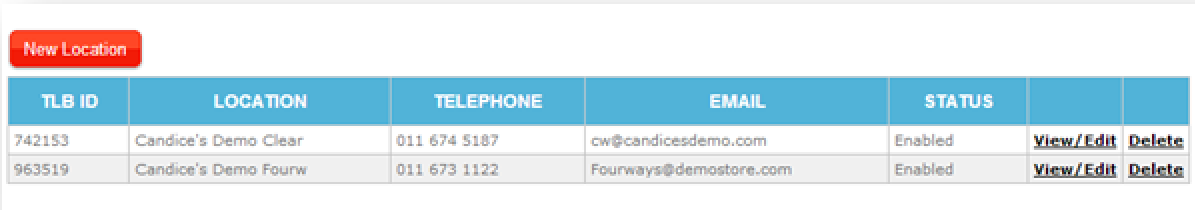


4. Fill in your Location Name: Be descriptive here, so that you can easily identify your different stores, if you have multiple locations. Example: Bob’s Pizza - Cape Town

5. Fill in the rest of the demographic details like telephone numbers and address information.
6. Notes:
    a. UTC Offset: Stands for "Coordinated Universal Time". Depending on where you are in the World, you will have a UTC offset. Why do I need this? Well, our servers are based in Cape Town & Johannesburg. If you are NOT living in South Africa and you want your transactions to show up in your local time, then you would enter in your UTC Offset here and then your transactions would show up in the correct time for you. You can find out what your UTC figure is by visiting http://www.worldtimeserver.com/current_time_in_UTC.aspx and searcing for your country.
    b. Employee Login: If you "tick" this option, then your employees will be required to enter in a username and password when they try perform transactions on your web terminal. (Employee Permissions, discussed a bit later)
    c. Status: Select Enabled or Disabled depending on whether the store is live or not.
7. When you're done, Click Save.

Add additional Locations:

1. All you need to do is go back and repeat the steps above for all the other locations you want to add, once saved you can see them all under Clients > Locations > View Locations tab



New Location

TLB ID	LOCATION	TELEPHONE	EMAIL	STATUS		
742153	Candice's Demo Clear	011 674 5187	cw@candicesdemo.com	Enabled	View/Edit	Delete
963519	Candice's Demo Fourw	011 673 1122	Fourways@demostore.com	Enabled	View/Edit	Delete

Step 2: Setup Terminals

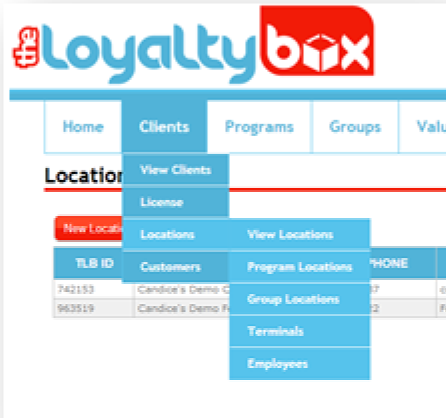
A terminal, for our Non-Retail readers, is like a PC or a Till. Each location would have at least 1 terminal, whether that is a PC, a point of sale machine or a mobile device. Some of you may have a whole bunch of terminals(tills) if you are a Convenience Store.

So think of the Terminal, as the thing you will use to record your customers transactions. The Loyalty Box gives you a really cool *web terminal* that you can use, just in case you don't have a Point of Sale system or some other device. You will be able to access your terminal from Internet Explorer; Firefox; Safari or Google Chrome. You can even get to it from your Cell Phone.

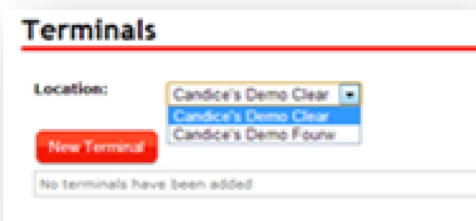
You would need to setup at least 1 terminal for each of your stores.

To setup your terminals:

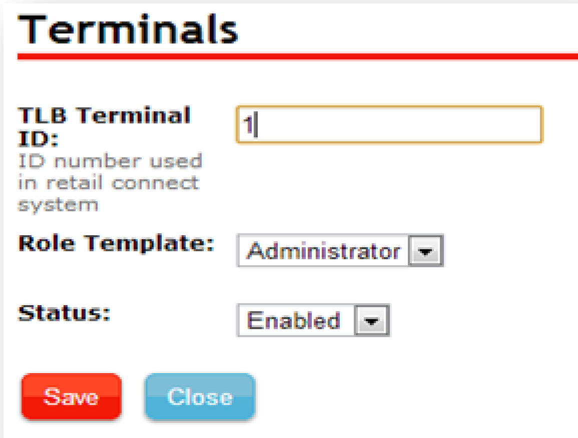
1. Roll mouse over Clients > Locations and then click on Terminals



2. Select your Location from the drop-down menu that you want to add a terminal for and then click New Terminal



3. Give your terminal a number. If its your first terminal, then call it “1”, your second “2” and so on.



4. Set the Role Template: The Role Template decides what functionality your Terminal can perform. As an example: You could set your terminal to only allow a “Capture Sale” while another terminal could perform “Capture Sale”; “Balance Enquiry”; Issue/Redeem Points” etc.

   There are three different Role Templates that you can apply to your terminal. Each Role Template can be customized to suit your needs.

   By Default, all three Role Templates are the same, you would need to edit the Terminal Permissions to change them.

   To get you started, just select Administrator for now.

5. Select the status: Enabled or Disabled
6. Then click Save

Add additional Terminals:

1. All you need to do is go back and repeat the steps above for all the other terminals you want to add, once saved you can see them all under Clients > Locations > Terminals

Location Setup: FAQ’s

- How many locations can I add?
- Why do I need to add a separate location for each of my stores?
- Do I have to add a terminal?

Create your program: Loyalty; Gift Card or any other type.

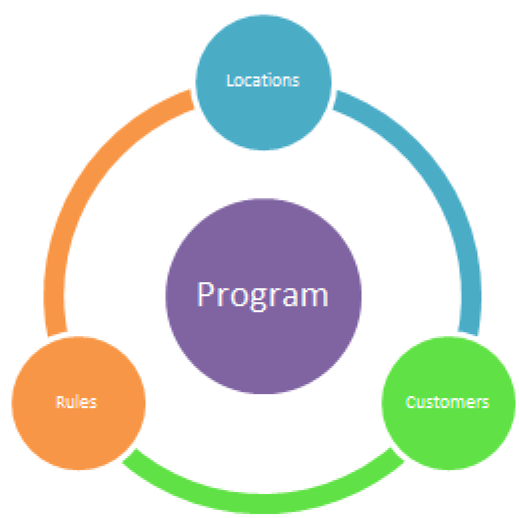
Now that you have setup your locations, you need to setup your program. A program can be any one of the following things:

- Customer Loyalty Program; Gift Card Program; Charity Program; Pensioners Program; Mall Staff Program; Coalition Program: Where you join forces with other stores from different brands to share customers; Sales Staff Incentive Program; Just about anything you can think of.

A Program consists of:

- Locations: The locations that participate in this particular program.
- Customers: The customers (card holders) that participate in this particular program.
- Rules: The rules that apply to this particular program. 5% cash-back on Saturdays etc

Note: You can run MULTIPLE programs within your store, if necessary.

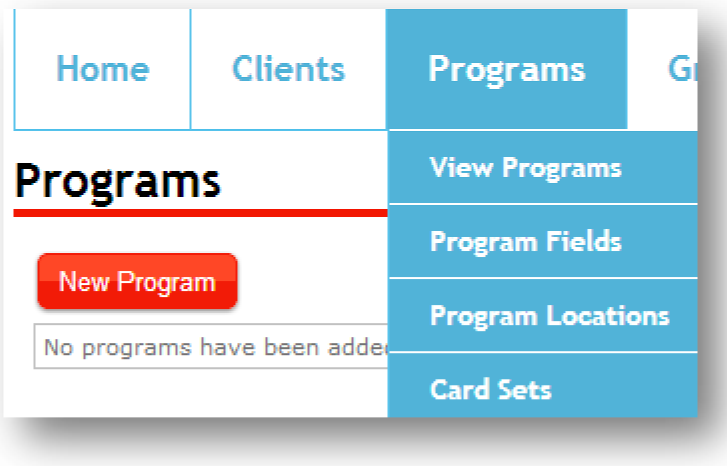


What you will learn in this section:

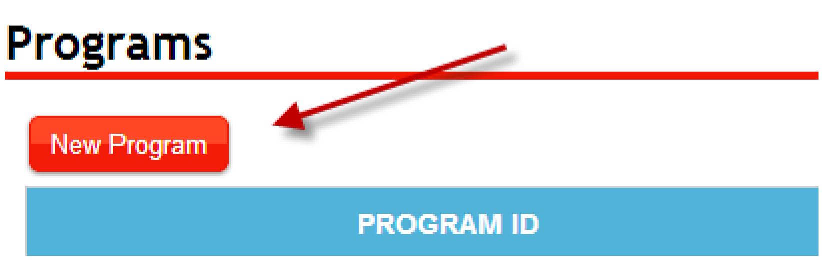
1. How to setup your program
2. Linking your locations to your program
3. How to create custom program fields
4. Setting up your Program Value Types

Step 1: Setup your Program

1. Click Programs > View Programs



2. Click New Program



3. Complete the Program info, as per the below:

    a. External ID: This ID can be sent to other users to link the program with their locations. Example: You want to join forces with another store down the road. If they also running The Loyalty Box, then the two of you can merge your programs and your card holders would now be able to swipe in the other store and their card holders in your store. Nice for partnerships and Coalition programs.

b. TLB Program ID: Just leave this as “0” unless instructed by your Agent to change.
c. Program Name: Give your program a meaningful name.
d. Status: Enabled or Disabled
e. Program Logo: Add a logo to your program. Your customers would see this if they use the mobi-site to check their balances.
f. Program Card: *Optional* You can add a “virtual card” design into your program. This is useful if you are NOT issuing physical cards. Your customer would be able to access their virtual card through the Mobi-Site. (See Guide - Customer Front End)
g. Capture Program Fields: Must be selected if you want to capture additional info along with the transactions i.e. Job number or Receipt number or anything else you can think of. See Custom Fields section below.

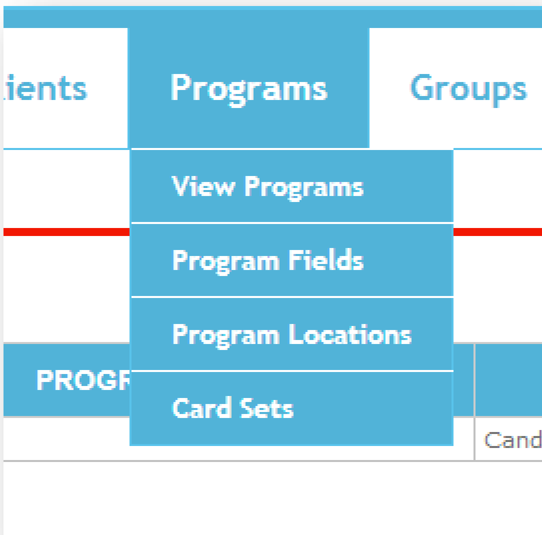
4. Click Save

Step 2: Link your locations to your program

Now that you have setup your program, you need to tell The Loyalty Box, which locations you would like to link to this program. Keep in mind, you could have different programs running at different locations so this feature is very powerful.

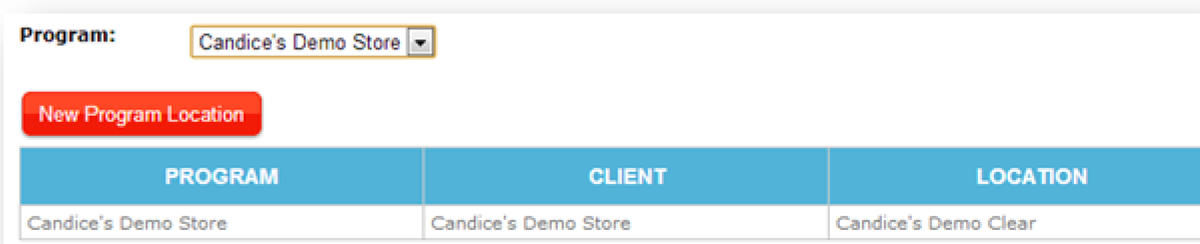
Linking locations to a program:

1. Go to Programs > Program locations

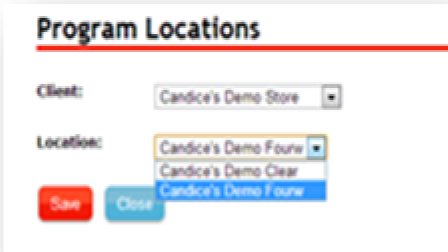


Note: Your default location should already be attached to your program.

2. To add a location to a program:
    a. Select the program from the drop-down list.
    b. Then click on “New Program Location”



c. Select the Location from the drop down



d. Click Save

Step 3: Creating Custom Program Fields

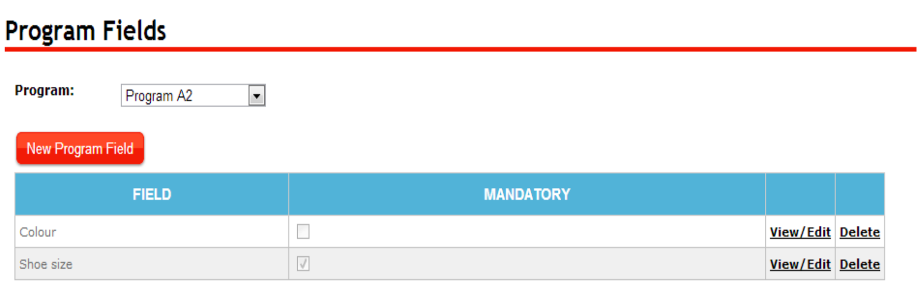
You would do this, only if you wanted to collect additional information at the time of the transaction.

Examples:

- You want to capture an INVOICE number when you recording a loyalty transaction.
- You want to know what the customers favorite colour is.
- You want to know how many people were at the table.
- Anything you can think of.

To create a custom program field:

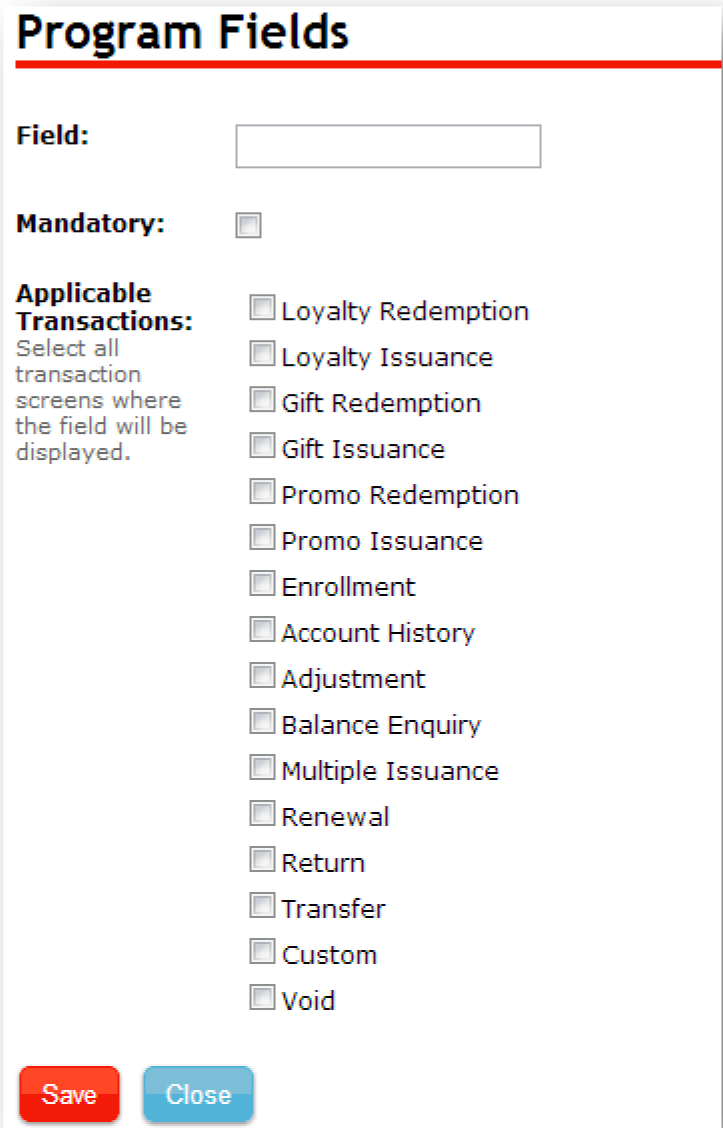
1. Go to Programs > Program Fields
2. Select the Program that you want to add this custom field too.
3. Click “New Program Field”



4. Field: Add in your Question. Example: What is your favorite Colour? Make this descriptive

so the teller/user will know to ask the question.

5. Mandatory: Tick this option if you want to force the teller/user to enter in a value here.
6. Applicable Transactions: Tick the transaction types that you want this custom program field to show up on. Example: You could have an INVOICE NUMBER custom program field and only want it to show up on Gift Issuance and Loyalty Issuance.



7. Click Save when you done.

Note: you can add additional custom program fields, just follow the same process.

Tip: To view your new program fields, visit your web terminal.

Step 4: Setting up your Program Value Types

What are Value Types:

You can think of Value Types as the things that will be stored against your customers card when they swipe in your store. For example, if you are running a loyalty program, you would want to have Points on the card and if its a Gift Card program, you would want Currency on the card.

We call these value types, “Stored Values”. The value type “Points” stores a customers points balance and a value type “Coffee” stores the number of coffees a customer has.

Multiple Stored Values on one card:

The Loyalty Box allows you to setup more than one value type (stored values) within a program. As an example: You may want to run a Loyalty Program that gives your customer 1 free coffee every time they reach 100 points. Therefore you would be storing “Points” and “Coffee’s against the customers card, so there would be 2 value types in this program. When the “Points” value reaches 100 then +1 will be added to the “Coffee’s” balance.

More Advanced Example on the Coffee’s Program above.

Lets say that you want to do the following:

For every R10.00 spent, I want to give 1 point and when the customer reaches 5 points I want to give them 1 free coffee.

Lets break down the “value types” being tracked.

1. “For every R10.00 spent....” So we tracking money spent, therefore a “currency” value type, in this case ZAR but could be USD or EUR etc.
2. “...I want to give 1 point and when the customer reaches 5 points.....” So we tracking a “points” value type.
3. “...give them 1 free coffee....” So we tracking a “coffee” value type.

So in the above example, there will be 3 value types associated to this program. A currency value type to track how much is being spent and a points value type to track how many points have been earned and a coffee value type to track how many coffees I have earned based on my points balance.

Hint: In 99% of the cases, there are at least 2 value types associated to a program. Usually a currency value type to track amount being spent and then another value type to keep track of points or free car washes etc.

Value Type Categories:

There are three categories of value types. The reason we have categories is to help you keep track of what the Value Type is supposed to hold. You would not want your "ice-creams" balance to be holding "currency" as an example.

- Points: This would typically be your loyalty points. You could call this "Perfect Pizza Points"
- Currency: This would be for all currencies like SA Rands; Dollars; Euros etc. We have specific values you will use for currencies. ZAR; EUR; USD. For additional currencies please contact your account manager.
- Custom: This is for anything else, like ice-creams; visits; free tickets etc.

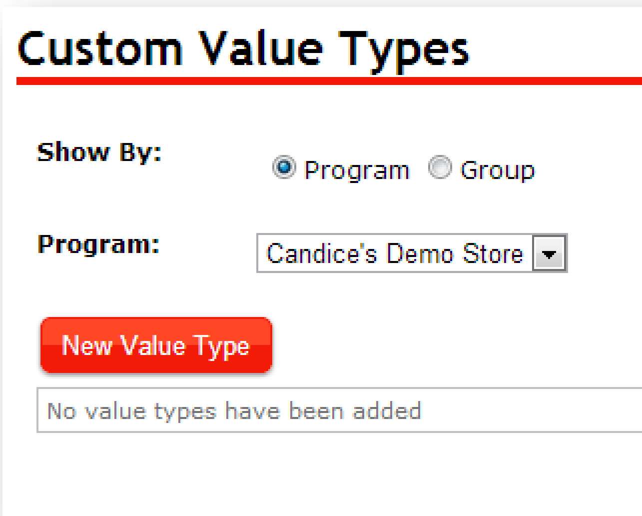
Here are some guides to help you get started:

- Loyalty Programs:
  - Points value type called "Points": So that you can store a customer's points.
  - Currency value type called "ZAR": So that you can capture what a customer is spending with you. You would usually award points based on the spend.
- Gift Card Programs:
  - Currency value type called "ZAR": So that you could issue (load) and redeem currency against the customers card.
- Frequency Programs:
  - Custom Value Type called "Visits": You would probably create a custom value type called "Visits" and have that stored against a customer's card. Every time the customer visits you they get +1 to their "Visits" balance.
  - Custom Value Type of "Movie Tickets": You may give the customer a free movie ticket once they have visited 10 times, therefore the "movie tickets" value type would be added to show the customer how many tickets they have earned.
- Combination Program:
  - Currency value type called "ZAR": So that you can capture what a customer is spending with you. You would usually award points based on the spend.
  - Points value type called "Points": So that you can store a customer's points.
  - Custom Value Type of "Movie Tickets": You may give the customer a free movie ticket once they have reached 100 points, therefore the "movie tickets" value type

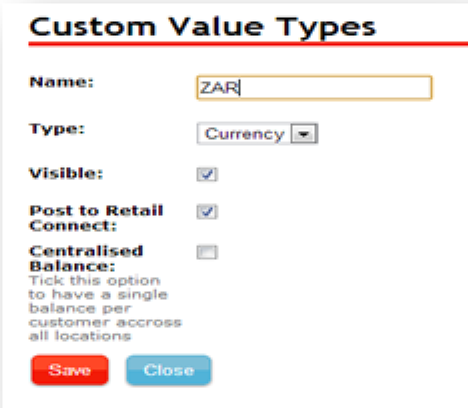
would be added to show the customer how many tickets they have earned.

Creating your Value Types:

1. Go to Value Types in the navigation menu.
2. Select the program you want to add a value type too.
3. Click on "New Value Type"



4. Name: Give your value type a name.
    a. IMPORTANT: If you are adding a "currency" value type, then you must use the country code format as the name: i.e. ZAR; USD; EUR
5. Type: Select the category of the value type you adding.
6. Visible: If you want this balance to show up to the customer or your Tellers / Users, then tick this box. If you want to keep this hidden then untick this box.
7. Centralised Balance: This is an advanced feature. Please view our "Guide to Ring Fencing Values" before enabling this. Leave unticked if you not sure.



8. Click Save

Note: To add additional value types just repeat the above process.

Hint: Creating value types but keeping them hidden allows you to track additional things about customers that would not be visible to them in the front end. Example, you could track a customer's total number of visits to your store by adding +1 to “Visits” but the customer would only see their “Points” balance as an example.

Create or Imports Cards

Most Loyalty programs have a physical card that the teller will swipe for the customer when they are paying at the till, your card numbers are also linked to the customers cell phone number should they leave their card at home or have lost it.

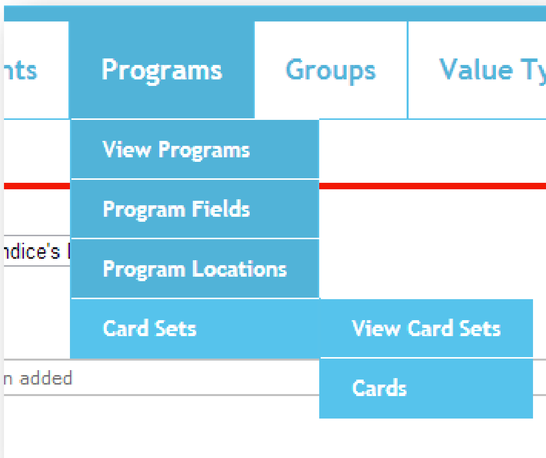
You can have multiple card sets depending on how you want your program to work, you can have a pensioners card, student card, VIP card etc.

What you will learn in this section:

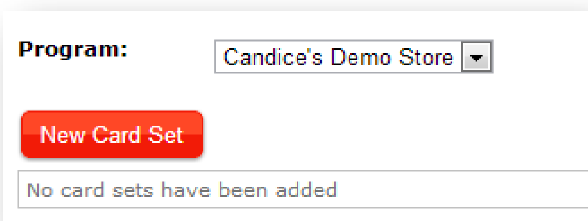
1. How to create a card set
2. How to import an existing card set

Step 1: Creating a card set

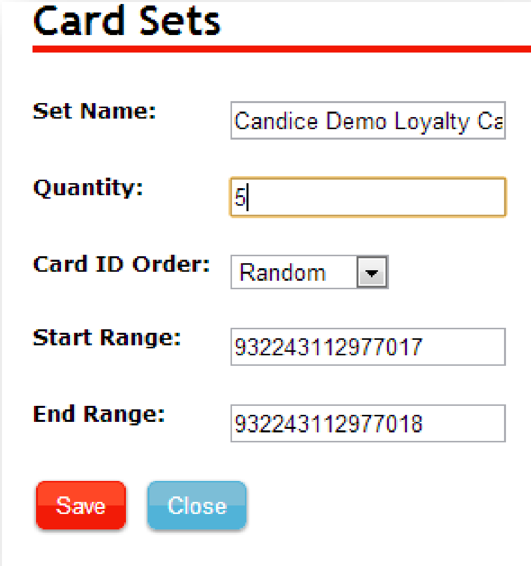
1. Click Programs > Card Sets > Click View Card Sets



2. Click New Card Set



3. Complete the info as below
    a. Set Name: Name your card set with relevance to who it is for (pensioners, students etc.)
    b. Quantity: the amount of cards you want to produce for that specific set.
    c. Card ID Order: you can select random or sequential if you want the numbers to be in order.
    d. Start and end range will be generated automatically, it will be the start and end of the Card Numbers

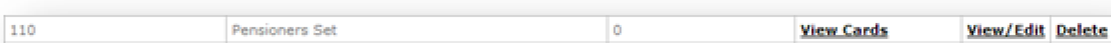


4. Click Save.

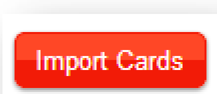
Step 2: Importing a card set

If you have already started a loyalty program on your own, you may already have card numbers. You can create the card set but instead of generating new numbers you can just import the ones you already have so there are no worries about having to print cards if you have already done so!

1. Click New Card Set as before and repeat the steps, except you will leave the Quantity option at 0.
2. Click Save
3. Click View Cards



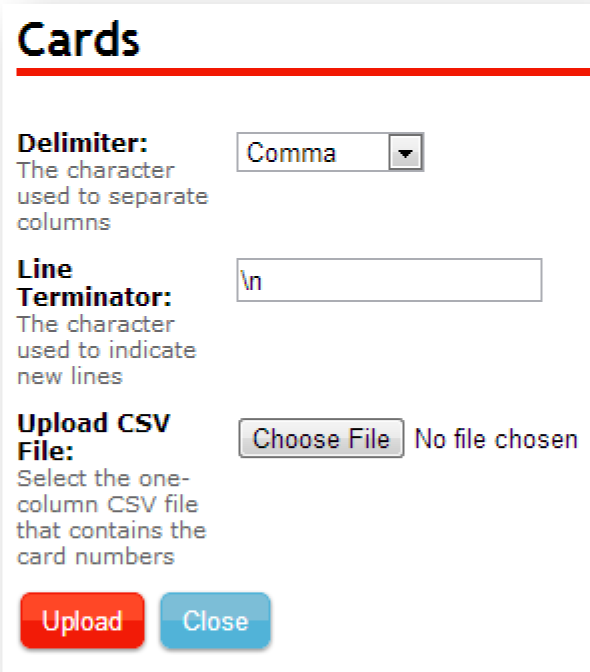
4. Click import cards



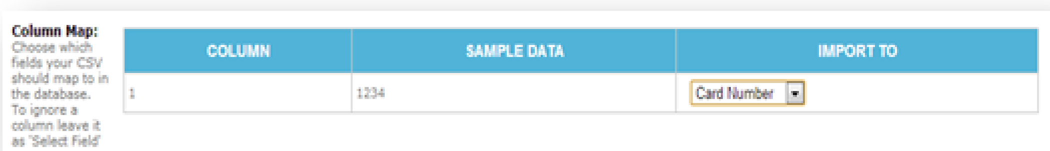
5. Click Choose File. The file that you import with your card numbers needs to be in CSV

format otherwise it will not work.

6. Click Upload and your cards will import into the Loyalty box



7. Make sure the drop down is set on Card Number > Click Save



Column Map: Choose which fields your CSV should map to in the database. To ignore a column leave it as 'Select Field'

COLUMN	SAMPLE DATA	IMPORT TO
1	1234	Card Number

This is what it will look like once your cards have been imported

PROGRAM	CARD SET	CARD ID NO	FIRSTNAME	LAST NAME	PHONE NUMBER		
Candice's Demo Store	Pensioners Set	83736280				View/Edit	Delet
Candice's Demo Store	Pensioners Set	83849474				View/Edit	Delet

Creating a Basic Rule

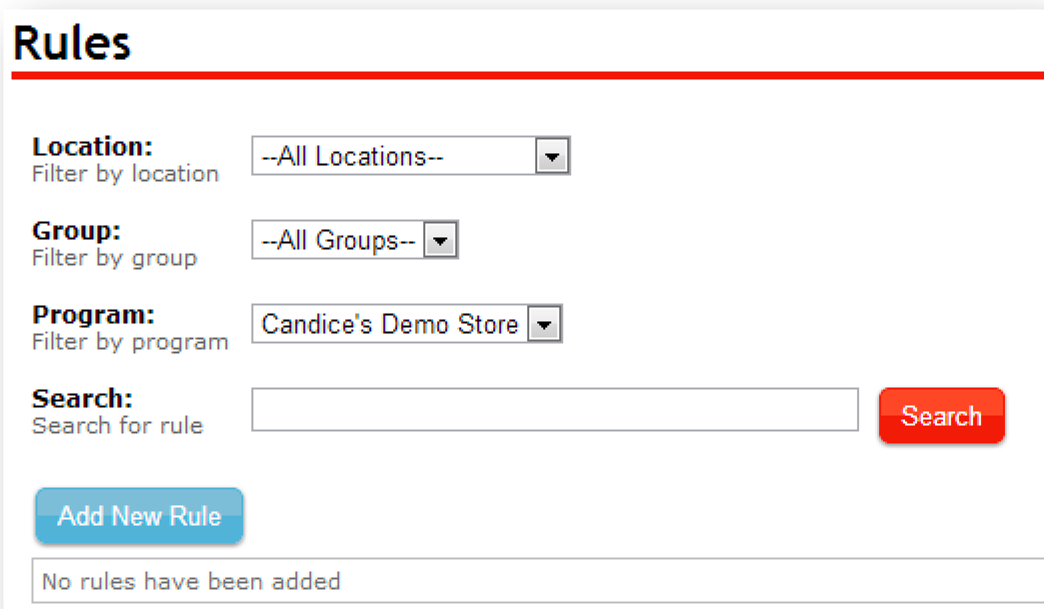
This is a basic guide for setting up a simple rule. For more rules please see our Advanced Rule Guide.

What you will learn in this section:

1. How to set up a cash back rule
2. How to add an Action

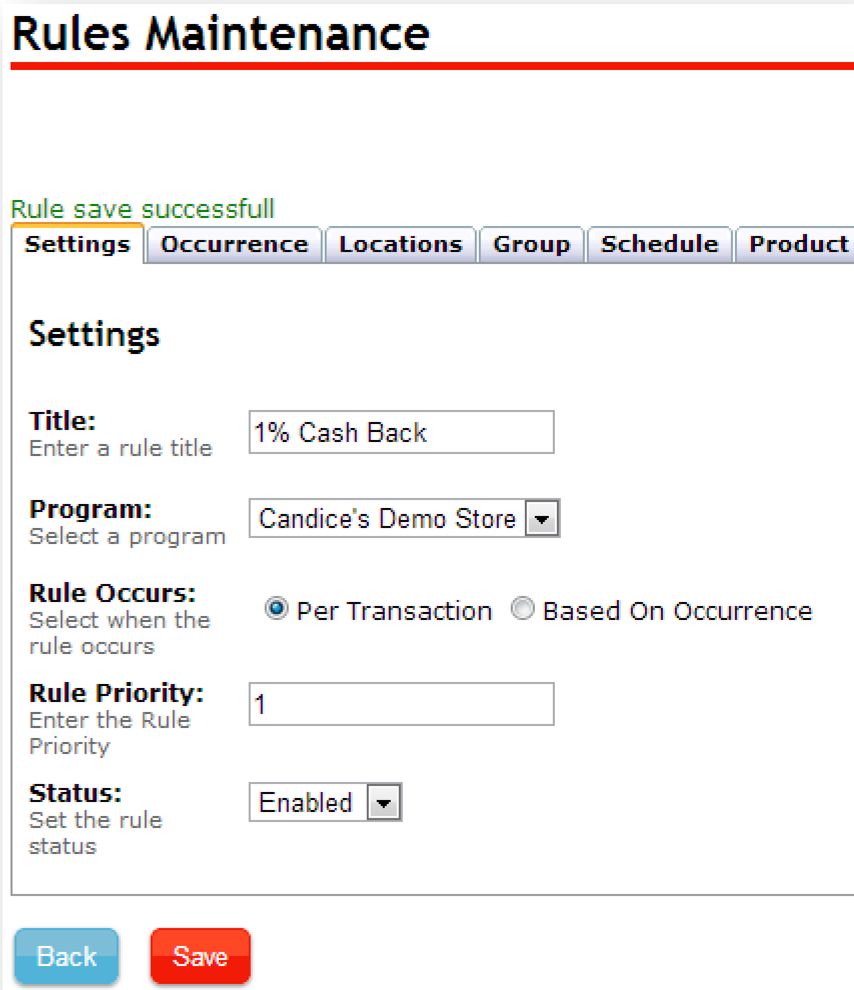
Step 1: Create a Rule

1. Click Rules > Select the store you would like to apply your rule to > Add New Rule

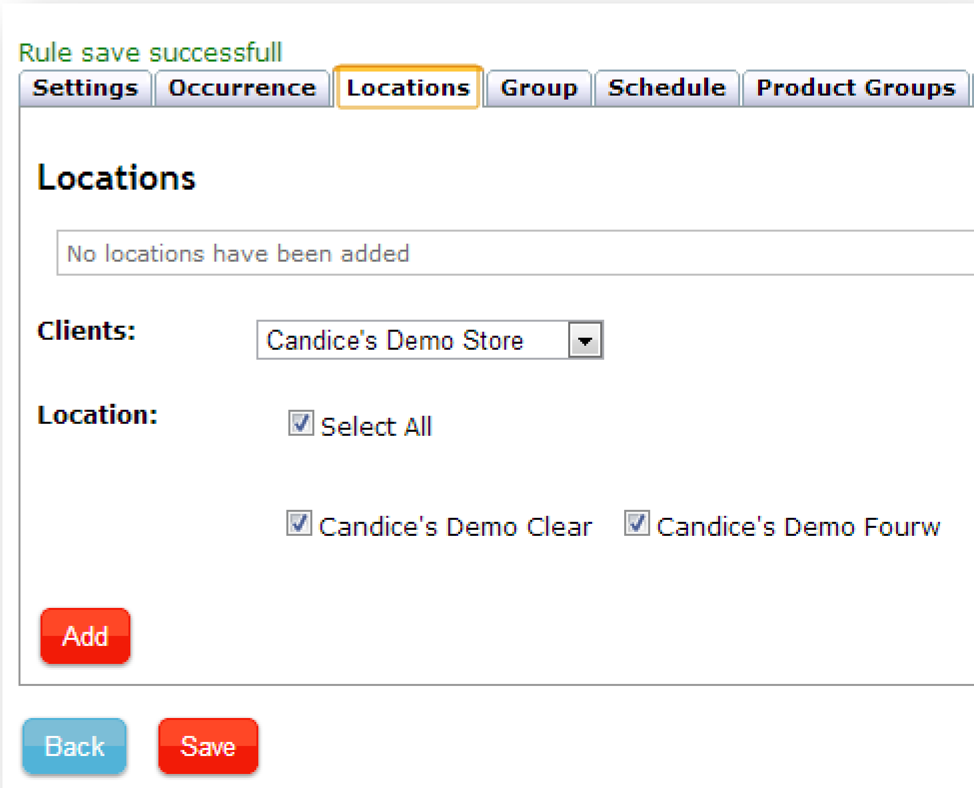


1. In settings enter the info as below
   a. Title: Enter the title of your rule

   b. Program: Select the program you want your rule to work for
   c. Rule occurs: Do you want your rule to run for every transaction or only on certain days or times
   d. Rule priority: if you have more than one rule you will label them 1,2,3 and so on
   e. Status: either enabled or disabled

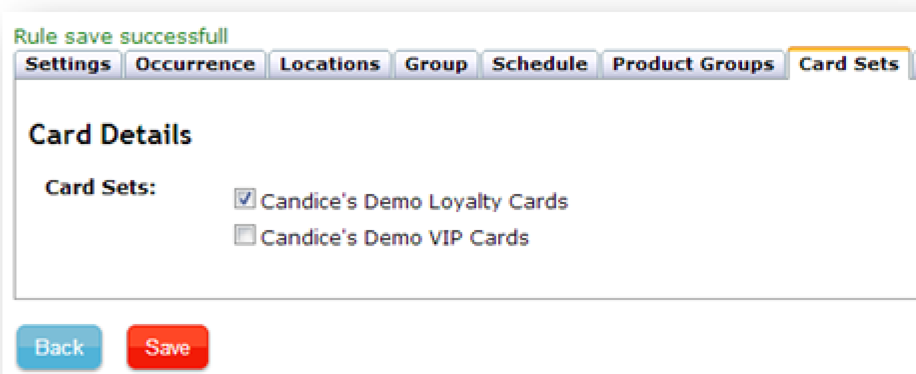


2. Add your locations to your rule
   a. if you want all locations to honour the rule say select all
   b. if your rule only applies to certain locations you select the relevant ones
   c. Click add > Save



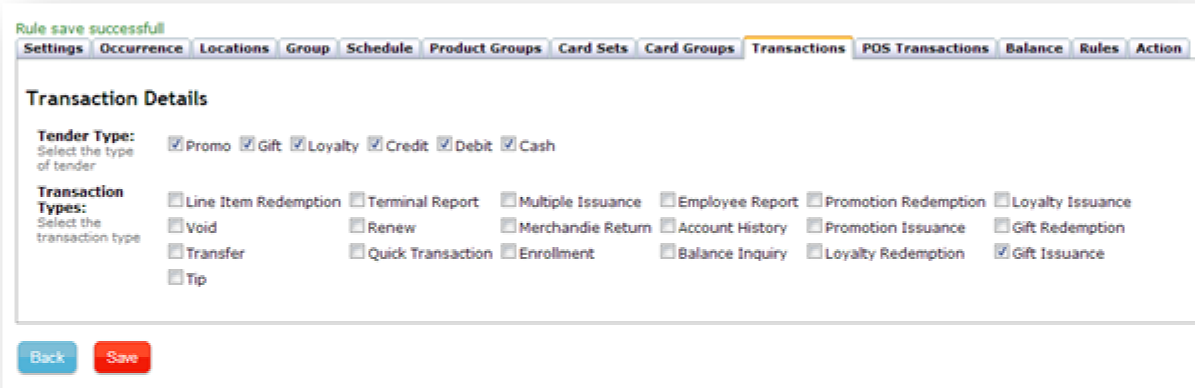
3. Add card sets to your rule: You can apply your rule to different card sets eg. your “VIP” card set might have more of a cash back than your “Loyalty” card set

   a. Select the card set
   b. Click Save



4. Transaction details (This indicates when you want your rule to fire. Do you want it to fire when you enroll a client or when you do a balance enquiry?)

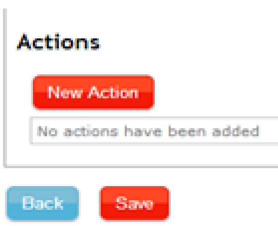
a. Tender Types: Select all 6 blocks
b. Transaction Types: Select Gift Issuance
c. Click Save



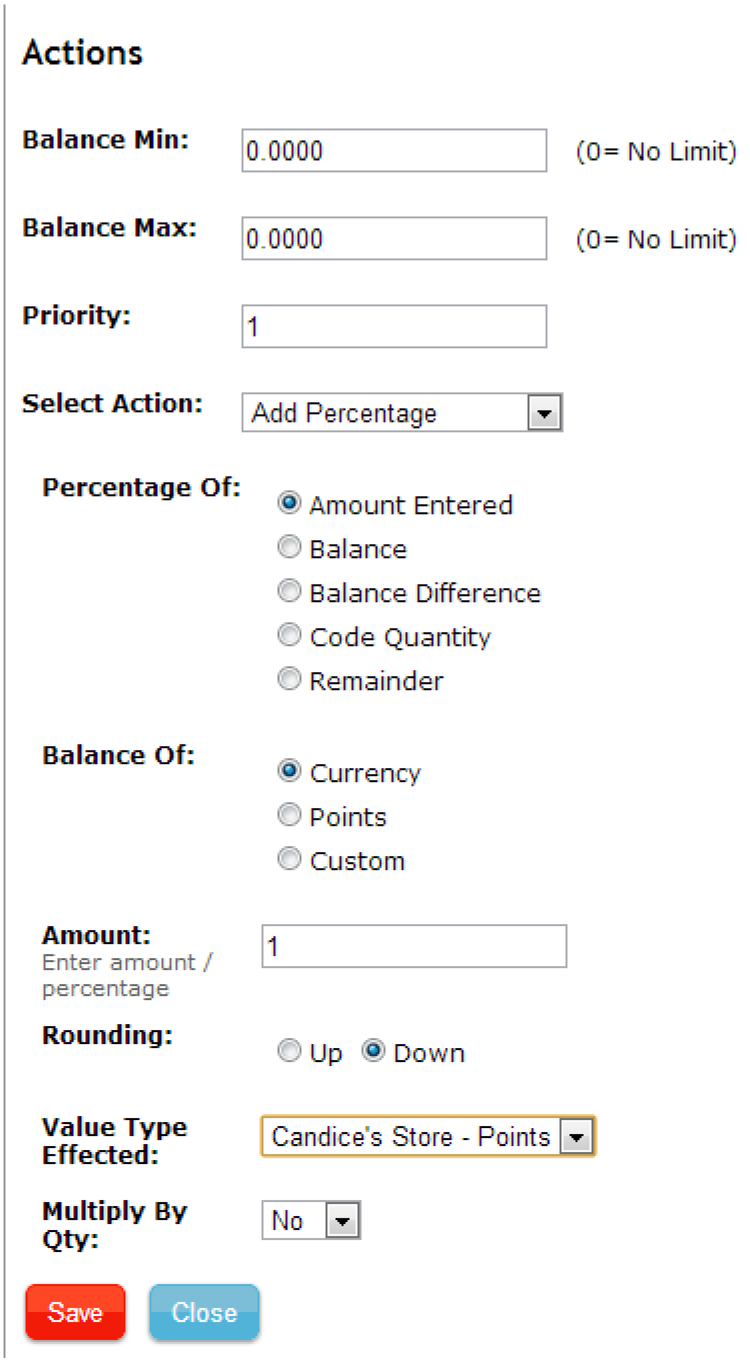
Step 2: Add an Action

Your action determines what the rule is going to do, whether you want your to add points to a card or send an sms to your customer is up to you. You can have more than one action to a rule.

1. Select New Action



2. Complete the info as below:
   d. Balance Min: for this rule leave as is
   e. Balance Max: for this rule leave as is
   f. Priority: depending on how many rules you have 1,2,3 and so on
   g. Select Action: we want to add a percentage of their total to their card
   h. Percentage of: Amount entered
   i. Balance of: Points
   j. Amount: The percentage that you want to give
   k. Rounding: you can round the percentage up or down
   l. Value type affected: Points because the customers balance will show as points (1 Point=R1)
   m. Multiply by quantity: No
   n. Click Save



Actions

Balance Min: 0.0000 (0= No Limit)

Balance Max: 0.0000 (0= No Limit)

Priority: 1

Select Action: Add Percentage

Percentage Of:
- (•) Amount Entered
- ( ) Balance
- ( ) Balance Difference
- ( ) Code Quantity
- ( ) Remainder

Balance Of:
- (•) Currency
- ( ) Points
- ( ) Custom

Amount: 1
Enter amount / percentage

Rounding: ( ) Up (•) Down

Value Type Effected: Candice's Store - Points

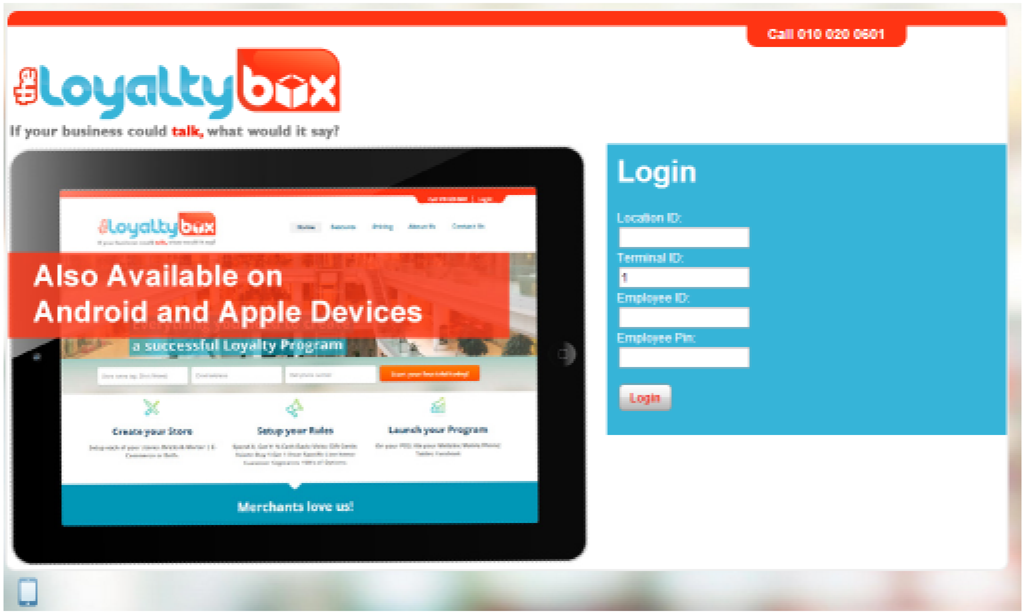
Multiply By Qty: No

Save Close

Accessing your Web Terminal:

Now that you have setup your location and added a terminal, lets go check it out!

1. Open up your web browser, and go to: http://webterminal.theloyaltybox.com



2. Enter in your Location ID
3. Enter the terminal number you want to log in to.
4. Fill out the rest of the information as required. NOTE: If you have disabled Employee Login then these fields will disappear when you enter your Location ID.
5. Login