



Version 1

Admin Area - How To Load A Gift Card Rule

THE LOYALTY BOX is a combination of world-class technology, backed by a professional support team ensuring that your program is a success.

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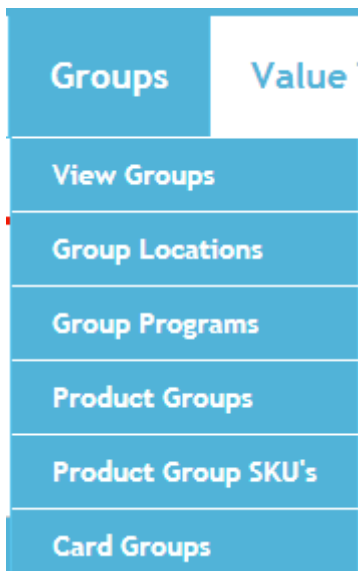
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Log into the admin area with your email and password

<https://admin.theloyaltybox.com>

Step One

1. Roll mouse over the groups tab → Click Product Groups



2. Make sure "program" is selected → Click New Product Group

Product Groups

Show By:

Location Program

Program:

Candice's Demo Store ▼

New Product Group

3. Type in the name of the product group (in this case it is gift card) → Click Save

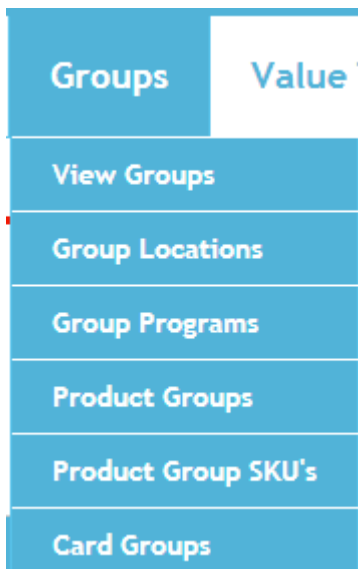
Product Groups

Product Group Name:

Save

Close

4. Roll mouse over Groups → Click Product Group SKU's



5. Make sure “program” is selected → Click New SKU

Product Group SKU's

Show By: Location Program

Program:

Product Group:

New SKU

Import SKU

6. Type in the PLU or SKU that you created on your POS system and the description → Click Save

Product Group SKU's

SKU:

Description:

Save

Close

Step Two

Now you must create the actual rule

1. Fill out the settings as below

Settings

Title:
Enter a rule title

Program:
Select a program

Rule Occurs: Per Transaction Based On Occurrence
Select when the rule occurs

Rule Priority:
Enter the Rule Priority

Status:
Set the rule status

Back

Save

2. Next go to the locations tab → select the locations that are featuring the gift cards → Click Add

Locations

CLIENT
Candice's Demo Store
Candice's Demo Store

Clients: ▼

Location: Select All

Candice's Demo Clear Candice's Demo Fourw

Add

3. Click the product group tab
 - a. Make sure program is selected
 - b. Make sure to include this group

Click Add

Show By: Location Program

Program: ▼

Product Group: ▼

Type: ▼

Add

4. Click the card sets tab → Select the correct card set

Rule save successful

Settings

Occurrence

Locations

Group

Schedule

Card Details

Card Sets:

- Candice's Demo Loyalty Cards
- Candice's Demo VIP Cards
- Pensioners Set
- Cand demo gift card

5. Click the transactions tab → Make sure the below boxes are ticked

Rule save successful

Settings

Occurrence

Locations

Group

Schedule

Product Groups

Card Sets

Card Groups

Transactions

POS Transactions

Balance

Ru

Transaction Details

Tender Type:
Select the type of tender

- Promo
- Gift
- Loyalty
- Credit
- Debit
- Cash

Transaction Types:
Select the transaction type

- | | | | | | |
|---|--|---|--|---|---|
| <input type="checkbox"/> Update Client | <input type="checkbox"/> Void | <input type="checkbox"/> Renew | <input type="checkbox"/> Enrollment | <input type="checkbox"/> Promotion Redemption (Committed) | <input type="checkbox"/> Loyalty Issuance |
| <input type="checkbox"/> Update Card Details | <input type="checkbox"/> Transfer | <input type="checkbox"/> Quick Transaction | <input type="checkbox"/> Employee Report | <input type="checkbox"/> Promotion Issuance | <input type="checkbox"/> Gift Redemption |
| <input type="checkbox"/> Promotion Redemption (Uncommitted) | <input type="checkbox"/> Tip | <input type="checkbox"/> Multiple Issuance | <input type="checkbox"/> Account History | <input type="checkbox"/> Loyalty Redemption | <input checked="" type="checkbox"/> Gift Issuance |
| <input type="checkbox"/> Line Item Redemption | <input type="checkbox"/> Terminal Report | <input type="checkbox"/> Merchandise Return | <input type="checkbox"/> Balance Inquiry | | |

6. Click the actions tab → Click new action

Rule save successfull

Settings

Occurrence

Location

Actions

New Action

7. Fill in as below → Click Save

Actions

Priority:

Select Action:

Percentage Of:

- Amount Entered
- Balance
- Balance Difference
- Code Quantity
- Remainder

Balance Of:

- Currency
- Points
- Custom

Amount:
Enter amount / percentage

Rounding: Up Down None

Value Type Effected:

Multiply By Qty:

Save

Close

Support

If you have any questions, please contact The Loyalty Box.

South African Contact Number: 010 020 0601

International Contact Number: (+27)10 020 0601

Email Address: support@theloyaltybox.com