



Version 1

Admin Area – Loading Points For Specials

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

Table of Contents

| | |
|----------------------------------|----|
| Loading Points For Specials..... | 3 |
| Cash Back on Occurrence..... | 13 |
| Support..... | 18 |

Loading Points For Specials

Points to remember:-

- a) Always put the sheet that the customer sends you into a clean excel document and save on your hard drive.
- b) There must be two columns: - One saying SKU (The Sku number is the Code) or PLU and other column saying Description
- c) Change the file into a CSV comma delimited format

Go to the admin area <https://admin.theloyaltybox.com>

Put in your username and password that management gave you

1. Scroll your mouse over Groups and select Product groups. Click

Product Groups

Show By:

Location Program

Location:



New Product Group

No product groups have been added

2. Select program

Show By: Location Program

Program:

New Product Group

No product groups have been added

3. Click on New Product Group and click

Product Groups

Product Group Name:

Save

Close

4. Call it whatever you want to call it. E.g. Beverage (1 dough) or Reg then Save

Product Groups

Product Group Name:

Save

Close

5. Still be in Groups and select Product group Sku's . Select Program

6. Select correct program group

7. Import SKU

Home Clients Programs **Groups**

Product Group SKU's

Show By: Location Program

Program:

Product Group:

No sku's have been added

8. The next screen will appear . Click on choose file. The file you will find on your hard drive that you created. The CSV comma Delimited File, and once it turns green click on Upload

Product Group SKU's

Delimiter:

The character used to separate columns

Line**Terminator:**

The character used to indicate new lines

Upload CSV File:

Select the one-column CSV file that contains the card numbers

 No file chosen

9. You will come to another screen asking you to select Sku and Description.
10. Click on down arrows and select these.
11. First Down arrow. See below. Select Sku
12. Second Down Arrow. See below. Select Description
13. Tick Skip 1st line. See below .
14. Save

Product Group SKU's

Sample Data:
Top 5 lines of
your CSV file

| | COLUMN 1 | COLUMN 2 |
|-----|----------|------------------|
| SKU | | Description |
| 1 | | 200ml Coke |
| 2 | | 200ml Coke Light |
| 3 | | 200ml Dry Lemon |
| 4 | | 200ml Ginger Ale |

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 | SKU | SKU Number ▼ |
| 2 | Description | Description ▼ |

Skip 1st Line:
Does the first
line contain
header
information

Save

Close

15. The following screen will appear showing all your products

Product Group SKU's

Show By: Location Program

Location: Sharrys Friendship ▼

Product Group: Sharry's Friendship ▼

New SKU

Import SKU

| PRODUCT GROUP | SKU | DESCRIPTION | | |
|---------------------|-----|------------------|---------------------------|------------------------|
| Sharry's Friendship | 1 | 200ml Coke | View/Edit | Delete |
| Sharry's Friendship | 10 | 330ml Coke Lite | View/Edit | Delete |
| Sharry's Friendship | 101 | Float Coke | View/Edit | Delete |
| Sharry's Friendship | 102 | Float Cream Soda | View/Edit | Delete |
| Sharry's Friendship | 109 | Juice Apple | View/Edit | Delete |
| Sharry's Friendship | 11 | 330ml Coke zero | View/Edit | Delete |
| Sharry's Friendship | 110 | Juice Mango | View/Edit | Delete |
| Sharry's Friendship | 111 | Juice Orange | View/Edit | Delete |
| Sharry's Friendship | 112 | Juice Pineapple | View/Edit | Delete |
| Sharry's Friendship | 113 | Kids Juice | View/Edit | Delete |

16. Now you need to add the rule that the client gave you

17. Go to Rules by putting your mouse over it . Select Location and Program . See Screenshot

18. Add new Rule

Rules

Location:

Filter by location

Sharrys Friendship ▼

Group:

Filter by group

--All Groups-- ▼

Program:

Filter by program

Sharrys friendship ▼

Search:

Search for rule

19. The following screen will appear.
20. Title will be what you want to call it. E.g. Earn one Point on Beverage
21. Select the Program
22. Rule Occurs keep as Per transaction or if based on occurrence then choose that box (We will go into the Occurrence later on in this process)
23. Save

Rules Maintenance

| | | | | | |
|----------|------------|-----------|-------|----------|-----|
| Settings | Occurrence | Locations | Group | Schedule | Pro |
|----------|------------|-----------|-------|----------|-----|

Settings

Title:
Enter a rule title

Program:
Select a program

Customer Birthday:
Rule fires only if customers birthday

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

Rule Priority:
Enter the Rule Priority

Status:
Set the rule status

[Back](#)[Save](#)

24. Next step. Go to Locations. You have to add the location to this rule

25. Clients. Select your location (store)

26. Tick your store

27. Then add

Rule save successfull

Settings Occurrence Locations Group

Locations

No locations have been added

Clients: Sharrys ▼

Location:

Select All

Sharrys Friendship

Add

28. Skip the next two steps. Remember we are only doing the process for adding fixed points to products. There is no occurrence nor Schedules happening at this stage. We will discuss that at the end of this process.

29. Go to Product Groups

30. Select Program

31. Include this group

32. Add

Rules Maintenance

Rule save successfull

Settings Occurrence Locations Group Schedule Product Groups

Product Groups

No product groups have been added

Show By: Location Program

Program: Sharrys friendship ▼

Product Group: beverage on dough ▼

Type: Include This Group ▼

Add

33. Go to Card Sets and tick the sets. This is a very important step . If the relevant boxes are not ticked then the points will not fire onto the Cards when they are swiped. Points to remember. If the client goes live and he is allocated 100 cards please go to the Rules maintenance and Tick the other box you see then SAVE

34. It will say Loyalty Cards or something else like Student Cards or whatever cards the customer has printed for their customers.

Rules Maintenance

Rule save successfull

Settings Occurrence Locations Group Schedule Product Groups Card Sets

Card Details

Card Sets: Sharry test cards

Back Save

35. Go to Transactions and tick everything on Tender type and tick Gift Issuance

36. Save

Rules Maintenance

Rule save successfull

| Settings | Occurrence | Locations | Group | Schedule | Product Groups | Card Sets | Card Groups | Transactions | POS Transactions | Balance | Rules | Action |
|----------|------------|-----------|-------|----------|----------------|-----------|-------------|--------------|------------------|---------|-------|--------|
|----------|------------|-----------|-------|----------|----------------|-----------|-------------|--------------|------------------|---------|-------|--------|

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 | | |

Back Save

37. Go to Action . Click on New Action

Rules Maintenance

Rule save successfull

| Settings | Occurrence | Locations | Group | Schedule | Product Groups | Card Sets | Card Groups | Transactions | POS Transactions | Balance | Rules | Action |
|----------|------------|-----------|-------|----------|----------------|-----------|-------------|--------------|------------------|---------|-------|--------|
|----------|------------|-----------|-------|----------|----------------|-----------|-------------|--------------|------------------|---------|-------|--------|

Actions

New Action

No actions have been added

Back Save

38. I am going to show you what to do when a client sends you a product list where he wants us to Add on points for certain products.

When you save the following screen will appear

a) Priority leave as "1"

b) Select Action . Select Add Fixed Amount

c) Amount : Enter amount percentage could be 1 or 2 or any amount that the customer wants to add onto that product. If it is "1" then 1% will be added onto the product when bought.

d) Rounding. Select None

e) Value type affected : Select program

f) Multiply by Qty Always say NO

g) Save

Rules Maintenance

Rule save successful

| | | | | | | | | | | | | |
|----------|------------|-----------|-------|----------|----------------|-----------|-------------|--------------|------------------|---------|-------|--------|
| Settings | Occurrence | Locations | Group | Schedule | Product Groups | Card Sets | Card Groups | Transactions | POS Transactions | Balance | Rules | Action |
|----------|------------|-----------|-------|----------|----------------|-----------|-------------|--------------|------------------|---------|-------|--------|

Actions

Priority:

Select Action:

Amount:
Enter amount / percentage

Rounding: Up Down None

Value Type Affected:

Multiply By Qty:

Cash Back On Occurrence

Process on how to add cash back on various products running at a specific time of the month

1. Repeat steps 1 – 27
2. Go To Occurrence and Add New Occurrence

Rule save successfull

Settings Occurrence Locations

Occurrence

New Occurrence

No occurrences have been added

Back Save

3. Select either one time or recurring
4. One Time meaning that you will put the Date in that you want the rule to start firing.
5. E.g. 1st April and the time you would like the rule to fire . E.g. 08 00 00
6. Save

Rule save successfull

Settings Occurrence Locations

Occurrence

Schedule: One Time ▼

Date: 2014/04/01

Time: 08 ▼ : 00 ▼ : 00 ▼

Save Close

Back Save

7. Still be in Rules Maintenance

8. If you want to tell a rule to fire from a certain date to an end date then select Schedule

9. See screen shot below

10. Enter in your start Date and the end date and tick the days you want the rule to fire.

Rules Maintenance

Rule save successfull

Settings Occurrence Locations Group Schedule Pr

Schedule Details

Start Date: 2014/03/31
Date the rule starts

End Date: 2014/04/01
Date the rule ends

Days / Times:
Days and times the rule should run

| Day | Start | End |
|------------------------------------|-------|-------|
| <input type="checkbox"/> Sunday | 00:00 | 23:59 |
| <input type="checkbox"/> Monday | 00:00 | 23:59 |
| <input type="checkbox"/> Tuesday | 00:00 | 23:59 |
| <input type="checkbox"/> Wednesday | 00:00 | 23:59 |
| <input type="checkbox"/> Thursday | 00:00 | 23:59 |
| <input type="checkbox"/> Friday | 00:00 | 23:59 |
| <input type="checkbox"/> Saturday | 00:00 | 23:59 |

Save Close

Back Save

11. Follow steps 29 – 37

12. Go to Action and Add New Action

Rule save successfull

| | | | | | | | | | | | | |
|----------|------------|-----------|-------|----------|----------------|-----------|-------------|--------------|------------------|---------|-------|--------|
| Settings | Occurrence | Locations | Group | Schedule | Product Groups | Card Sets | Card Groups | Transactions | POS Transactions | Balance | Rules | Action |
|----------|------------|-----------|-------|----------|----------------|-----------|-------------|--------------|------------------|---------|-------|--------|

Actions

New Action

No actions have been added

Back Save

13. The Next screen will appear

14. Change this slightly because you are now adding a percentage on the products that the client sent you. The client will already have a cash back loaded but on certain products they might want another 5% loaded for example, for the month of April or for a weekend over Easter, or anything that they have stipulated to us to load

15. Priority: 1

16. Select Action: Add Percentage

17. Percentage of: Amount Entered

18. Balance of : Points

19. Amount: 5 (whatever the cashback is)

20. Rounding: None

21. Value type affected: Name of the Program – Points

22. Multiply by qty: No

23. Save

Rule save successful

Settings Occurrence Locations Group Schedule Product Groups Card Sets Card Groups Transactions POS Transactions Balance Rules Action

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:

24. Refer back to screen shot above

25. See option Multiply by Qty. You will say yes to this if a client wants 1 point added to certain products for example: Client requests us to add 1 point to his customers cards, when ordering for instance a hot chocolate. The client might have 4 guests at the table and orders 4 hot chocolates and pay one amount. If you ticked No, then only 1 point would have been added to the total . By saying Yes, a point will be added to each hot chocolate

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