



Version 1

Dolfin POS – How To Guide

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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Enrolling a Customer

Used when a new customer joins the program

Adding a new Client

1. Go to <https://webterminal.theloyaltybox.com/>
2. Enter in your location ID that you received from your loyalty agent → Click Login twice
3. Click “New Client”



4. Fill in relevant details as below

New Client

Step 1 of 3: Client Details

Account Number:

First Name:

Surname:

Cell Number:

Email:

Gender:

Date Of Birth e.g. 2012/01/01:
Year Month Day

New Client

Step 2 of 3: Client Address

Address 1:

Address 2:

City:

Postal Code:

Country:

New Client

Step 3 of 3: Marketing

Marketing:

- Accept Email Marketing
- Accept SMS Marketing
- Accept Phone Calls

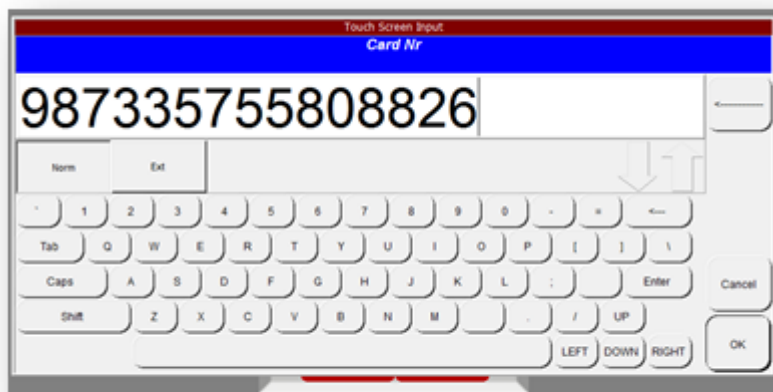
The customer is now enrolled in your Loyalty Program

Capturing a Loyalty Sale

1. Ring up your sale as per usual
2. If the customer presents their loyalty card, then Select "Loyalty Sale"



3. Type in the customer's membership/cell number → Click OK



- The customer's balance will show up → Click OK

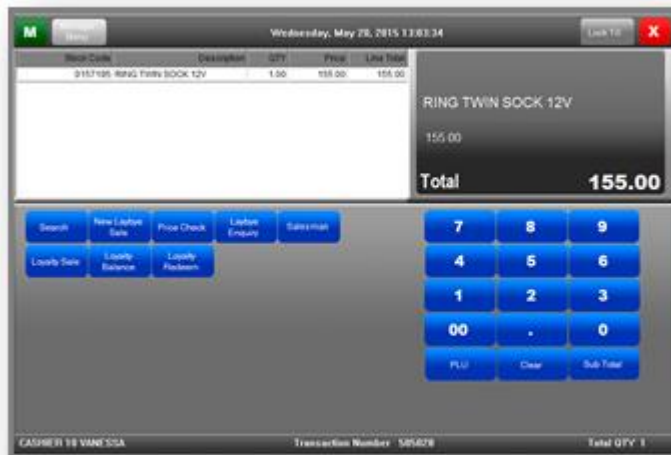


- Proceed with sale as per normal (subtotal > Tender > Enter)

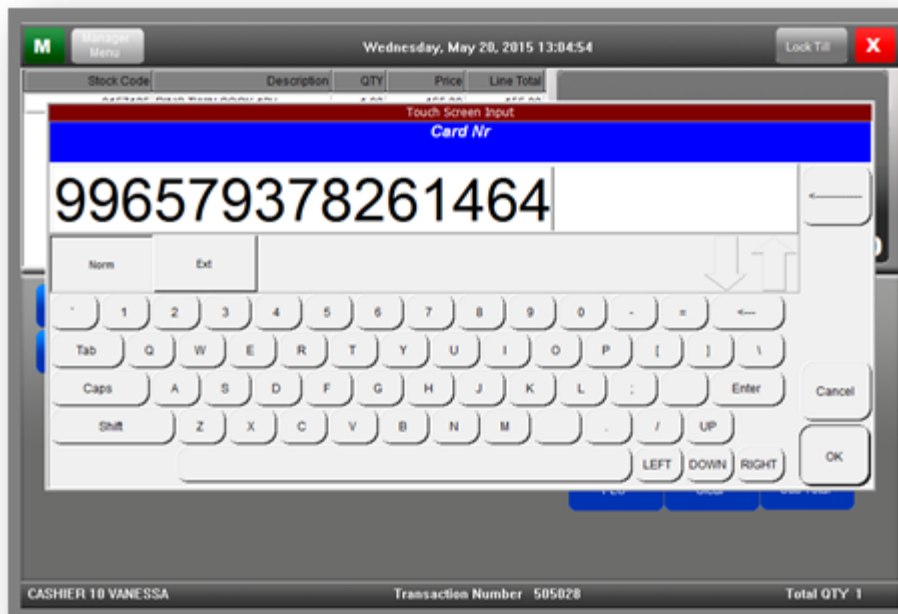
Redeem Loyalty Points

When a customer wants to redeem their loyalty points, then you treat the loyalty points as a normal tender type

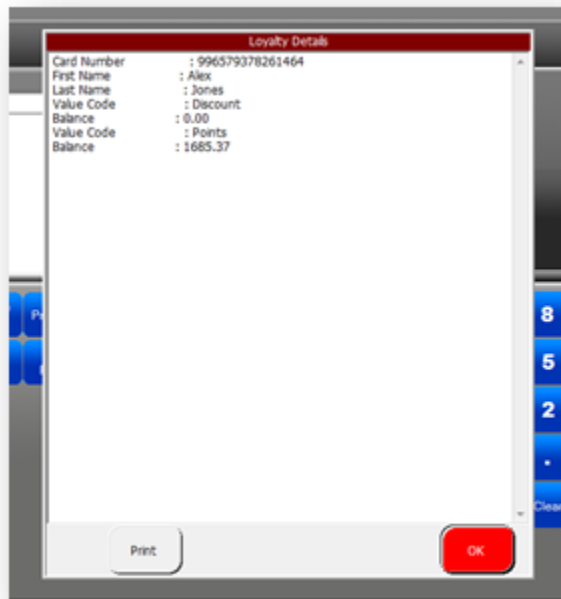
- Ring up your sale as per usual
- Click Loyalty customer



3. Type in the customer's membership/cell number → Click OK



4. The customer's balance will show up → Click OK (now you know how much can be redeemed)



5. Finish your sale as normal

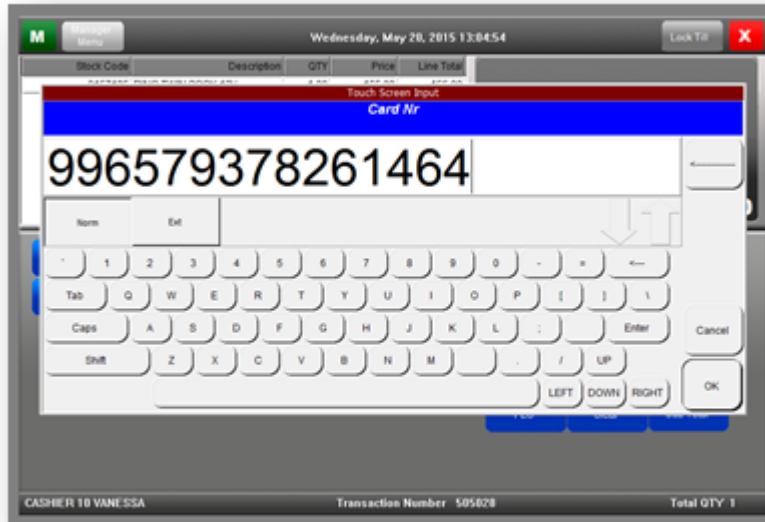
Balance Enquiry

Used when a customer wants to know their points balance.

1. Select "Loyalty Balance"



2. Type in the customer card/Cell number → Click OK



3. The customer's details and balance will pop up.

Support

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

South African Contact Number: 010 020 0601

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