



Version 1

GAAP – 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

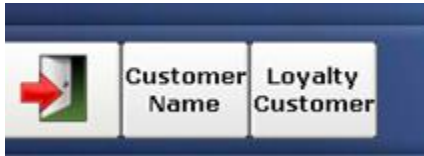
Accept SMS Marketing

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 customer"



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



4. The customer's balance will show up → Click OK



5. Proceed with sale as per normal (subtotal > Cash > Enter > Record)

Redeem Loyalty Points

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

1. Ring up your sale as per usual
2. 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)



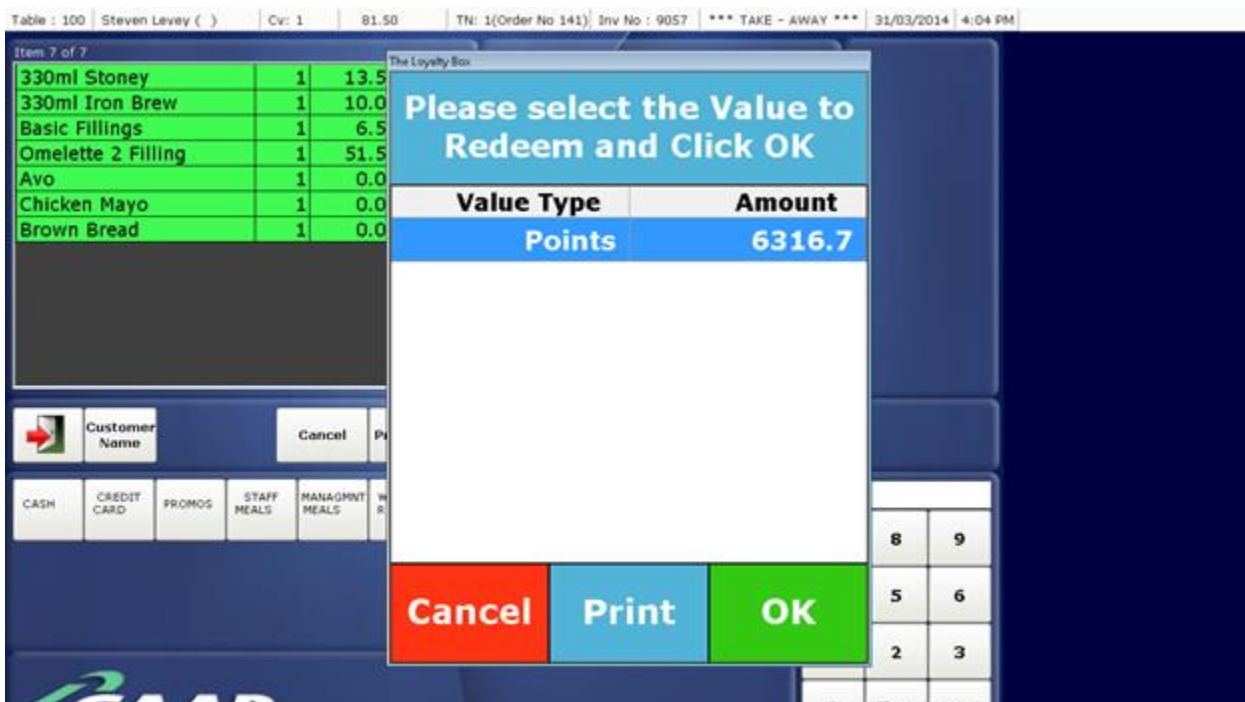
5. Click Subtotal (Remember the amount that you want to redeem)



6. Click Loyalty Box



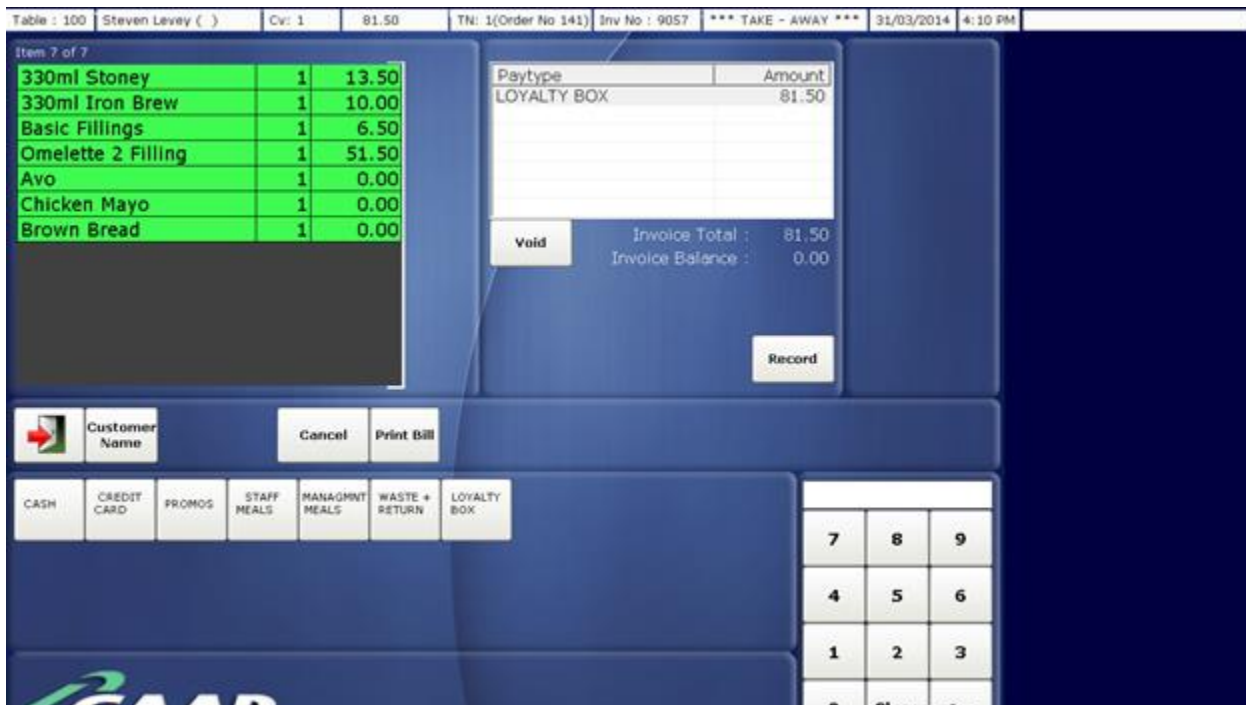
7. Click "OK"



8. Enter in the amount that you would like to redeem → Click OK



9. Click "Record"



10. The redemption is now finished

Balance Enquiry

Used when a customer wants to know their points balance.

1. Select "Loyalty Customer"

Table : 100 | Steven Levey () | Cv: 1 | 0.00 | TN: 1 | Inv No : 9057 | 31/03/2014 | 4:13 PM

Item 7 of 7

330ml Coke	330ml Coke Light	330ml Coke Zero	330ml Creme Soda	330ml Fanta Grape
330ml Fanta Orange	330ml Ice tea Lemon	330ml Ice Tea Peach	330ml Ice Tea Raspberry	330ml Ice Tea Red
330ml Iron Brew	330ml Liq fruit Br Punch	330ml Liqui fruit Orange	330ml Sprite	330ml Sprite Zero
330ml Stony	330ml Tab	350ml Sir Juice Orange	350ml sir juice Apple	350ml Sir Juice Strawber
350ml Sir Juice Foottail	500ml Coke	500ml Coke Lite	500ml Coke Zero	500ml Creme Soda

Dbt

Customer Name Loyalty Customer

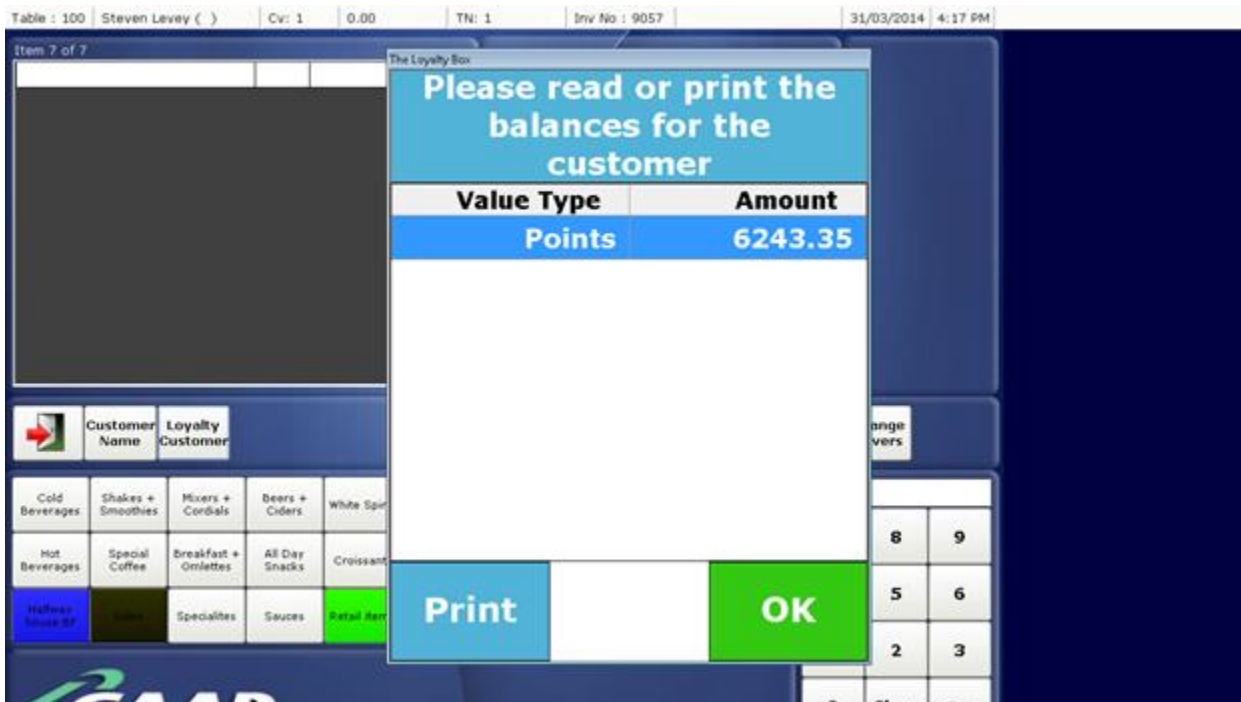
Change Staff Change Split Table Change Covers

Cold Beverages	Shakes + Smoothies	Mixers + Cordals	Beers + Ciders	White Spirts	Wines	Brandy	Whiskey	Rum	Liquers			
Hot Beverages	Special Coffee	Breakfast + Omelettes	All Day Snacks	Croissants	Tram + Wraps	Sandwiches	Function Menu	Salads	Burgers	7	8	9
Halfless		Specialites	Sauces	Retail Items	Old Menu Items	Extras	No	Instructions		4	5	6
										1	2	3
										0	Clear	Esc

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



3. You can tell the customer their balance now



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