



Version 2

**IQ Retail – How To Guide
Version 7.0.0.3**

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

Enrolling a Customer.....3

Capturing a Loyalty Sale/ Doing a Balance Enquiry.....4

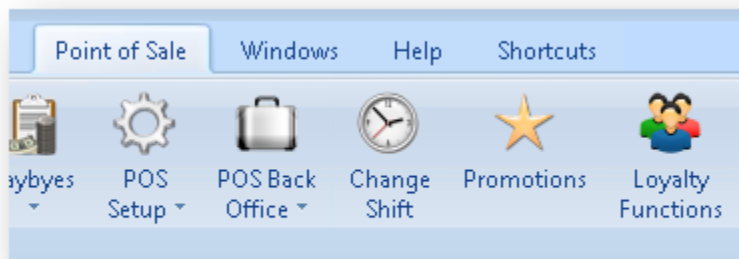
Redeem Loyalty.....6

Support.....9

Enrolling a Customer

Used when a new customer joins the program

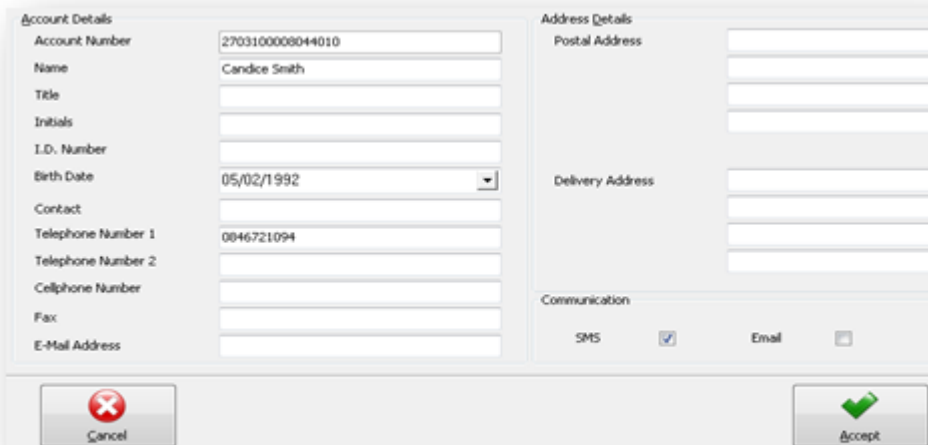
1. Point of sale > Loyalty Functions



2. Click Enroll



3. Fill out the customers details Fill out the customers details > Click Accept (the "Account Details Field will only allow you to enter the card number once all other details are entered, whereby a pop-up screen will appear asking for the card number)

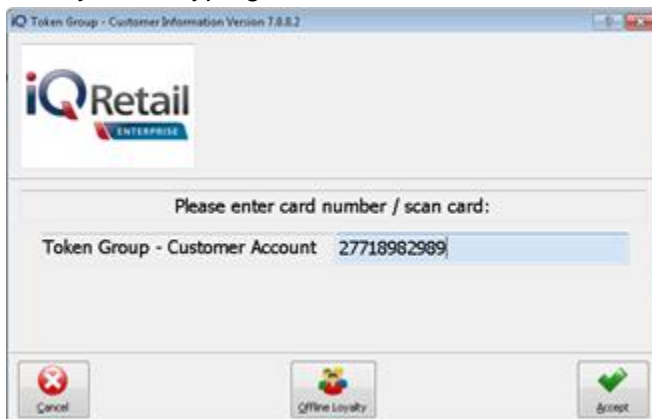
A screenshot of a form with two columns: 'Account Details' and 'Address Details'. The 'Account Details' column has fields for Account Number (2703100008044010), Name (Candice Smith), Title, Initials, I.D. Number, Birth Date (05/02/1992), Contact, Telephone Number 1 (0046721094), Telephone Number 2, Cellphone Number, Fax, and E-Mail Address. The 'Address Details' column has fields for Postal Address and Delivery Address. At the bottom, there are checkboxes for 'SMS' (checked) and 'Email' (unchecked). At the very bottom are 'Cancel' and 'Accept' buttons.

The customer is now enrolled in your Loyalty Program

Doing a Balance Enquiry/Capturing a Loyalty Sale



1. Select "Point of Sale" > "Sales" > "Cash Sale"
2. If the customer presents their loyalty card, then Select push "F9" or select the "Loyalty" button in the bottom right.
3. The following screen will come up > Type in the customer's membership/cell number (remember if you are typing in the customer's cell number, replace the 0 with 27) > Click Accept



4. The following will come up, if you just wanted to see the customer's balance you can now exit. If you are doing a sale you can now carry on as per usual



Redeem Loyalty Points

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

The screenshot shows a software window titled "iQ Tax Invoice Version 6.0.1.1". It is divided into two main sections: "Tender Media" on the left and "Details" on the right. At the bottom, there is a button labeled "Esc to Exit".

Tender Media: A vertical list of buttons for selecting payment methods:

- F1 Cash (highlighted with a blue dashed border)
- F2 Credit Card
- F3 Cheque
- F4 Loyalty Card
- F5 Coupon
- F6 ...More

Details: A summary of the current transaction's financial state:

- Amount to Pay:** 57.00
- Remaining:** 57.00
- Change Due:** 0.00

1. Select "F1" on the POS to Total up the sale.
2. Select "F4 Loyalty Card" to get to the "Loyalty" tender type that you created earlier. Please note that if you did not use "Gift Voucher 1" to setup the loyalty tender type then select the tender type you chose instead.

3. Select "F1 Loyalty" to enter in an amount of points the customer wants to redeem



4. Enter in the customer's Card Number/Cell Number > Click Accept



5. Hit Enter to complete the sale
6. The points redeemed will now be removed off the customers card.

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