



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.

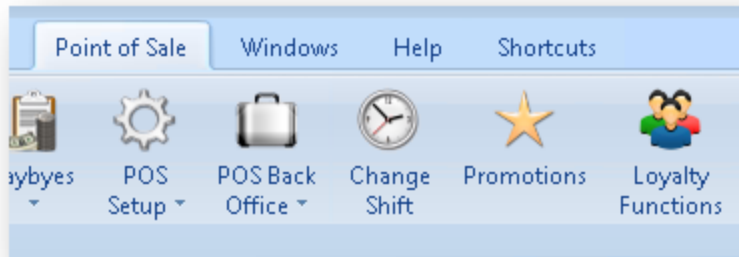
Table of Contents

Enrolling a Customer.....	3
Capture a Loyalty Sale/ Doing a Balance Enquiry.....	4
Redeem Loyalty Points.....	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 > 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)

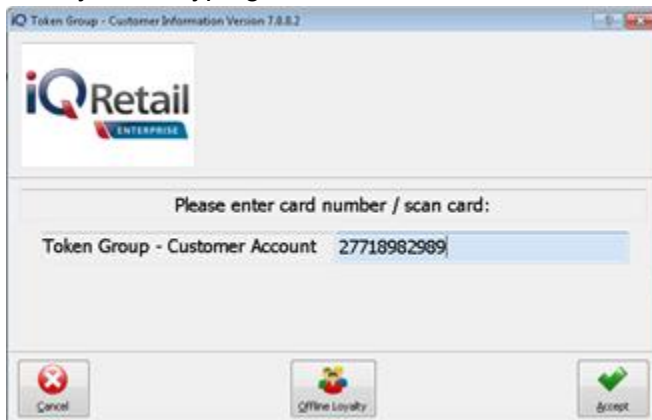
A screenshot of a customer enrollment form. The form is divided into two main sections: 'Account Details' and 'Address Details'.
Account Details:
- Account Number: 270310008044010
- Name: Candice Smith
- Title:
- Initials:
- I.D. Number:
- Birth Date: 05/02/1992
- Contact:
- Telephone Number 1: 0046721094
- Telephone Number 2:
- Cellphone Number:
- Fax:
- E-Mail Address:
Address Details:
- Postal Address:
- Delivery Address:
Communication:
- SMS:
- Email:
At the bottom of the form, there are two buttons: 'Cancel' (with a red X icon) and 'Accept' (with a green checkmark icon).

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.

Tender Media

- F1 Cash
- F2 Credit Card
- F3 Cheque
- F4 Loyalty Card
- F5 Coupon
- F6 ...More

Details

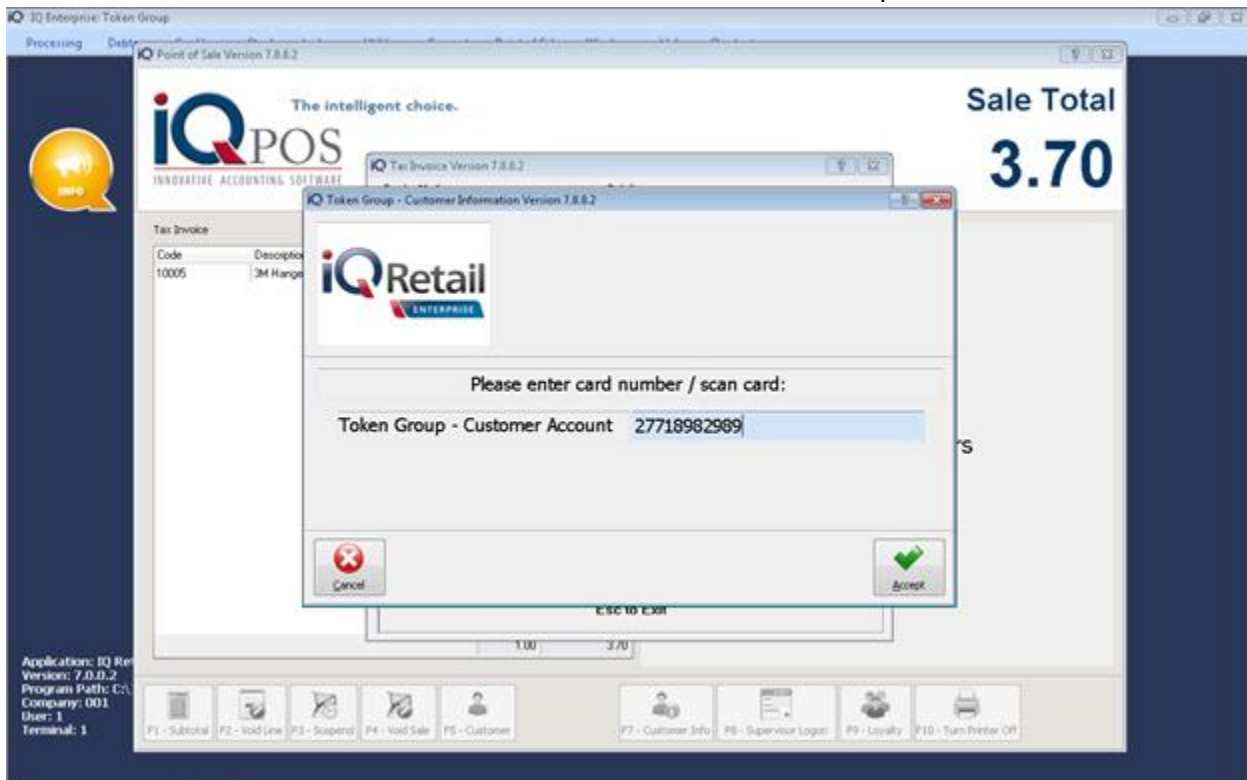
Amount to Pay	57.00
Remaining	57.00
Change Due	0.00

Esc to Exit

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