



Version 2

# IQ Retail – Loyalty Setup And 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.

### **Table of Contents**

Setting up the Store.....3

Setting up the Loyalty Tender Type.....6

Capturing a Loyalty Sale.....9

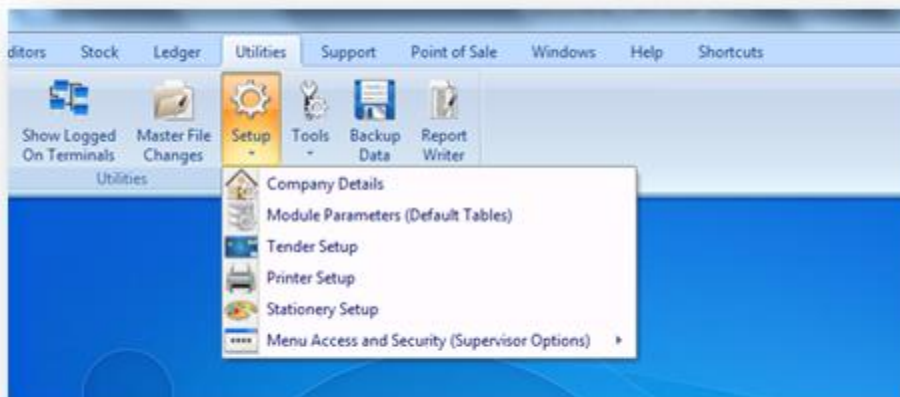
Redeem Loyalty Points.....13

Balance Enquiry.....16

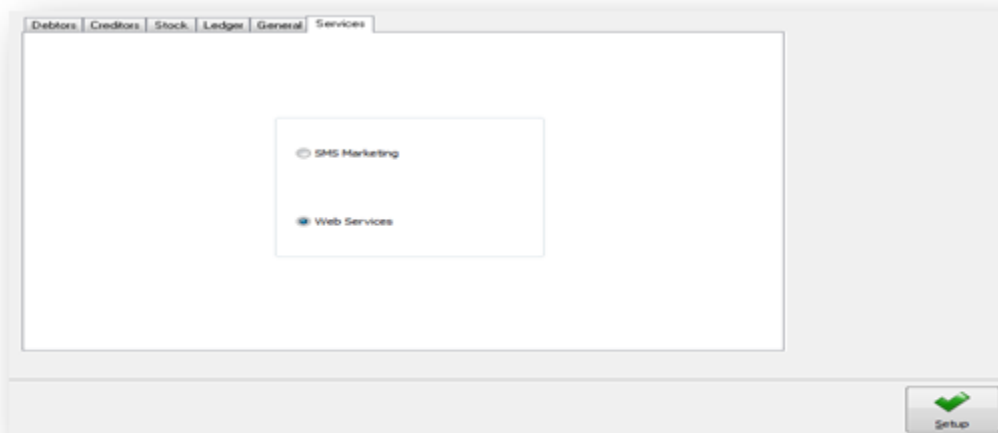
Enrolling a Customer.....17

Support.....19

## Setting up the Store





- 1) Select "Utilities"
- 2) Select "Setup"
- 3) Select "Module Parameters (Default Tables)"



- 4) Go to the "Services" tab on the far right.
- 5) Select "Web Services"
- 6) Click the "Setup" button in the bottom right.

- 7) Fill in the following:
  - a. URL = `http://webservice.theloyaltybox.com/RetailConnect_LineItems.aspx`
  - b. Port = 80
  - c. Client ID = 1724
  - d. Location ID, Integration Username and Integration Password = {Enter in the information Provided by the Token Group Account Manager in these fields}
  - e. Make sure “Enable Debug Logging” turned off
- 8) Click “Save”
- 9) Click “Test Inquiry” in the bottom left to test that the connection is working.
  - a. Enter in a card number and click “accept”, the connection tests itself.
- 10) Click on “Accept” button if the test came back successfully.

Web Service Setup	
URL	<code>http://tokenws.netgen.co.za/retailconnect_lineit</code>
Port	80
Integration Username	
Integration Password	*****
Client ID	1724
Location ID	
Enable Logging	<input type="checkbox"/> Tick For Yes
Enable Proxy	<input type="checkbox"/> Tick For Yes
Host (Proxy)	
Username	
Password	
Port (Default 3128)	3128

 Test  Accept



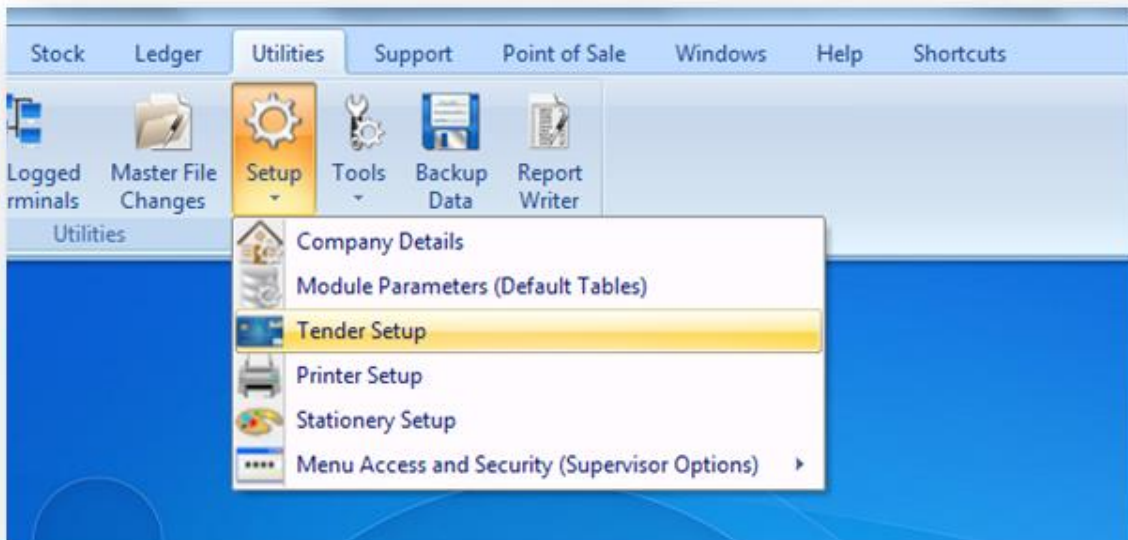
**\*NB\***

Click **Utilities > Setup > Company Details > Default Settings 2 > Default loyalty Provider.**

**Ensure that Tokengroup is selected in this screen.**

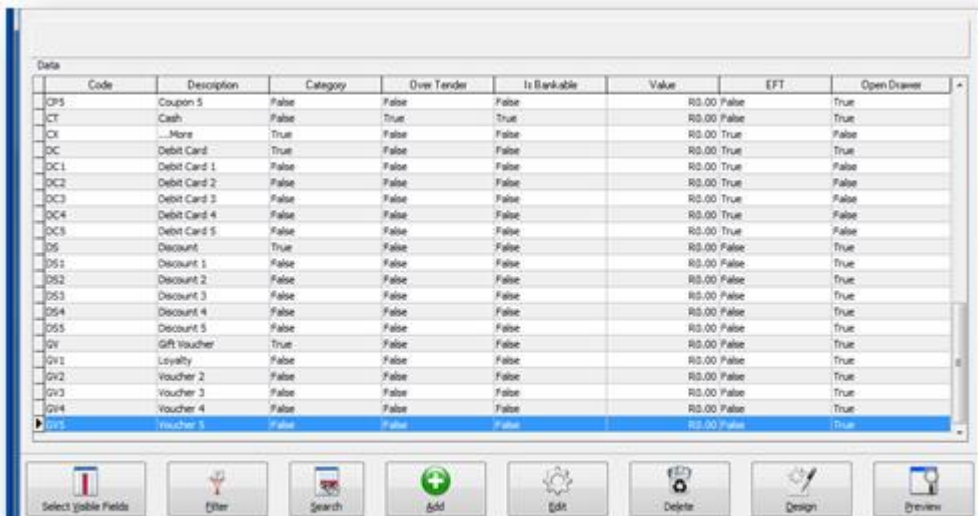
## Setting up the Loyalty Tender Type

You will need to do this in order for the “Loyalty” option to show up on the POS as a tender type.



- 1) Select “Utilities”
- 2) Select “Setup”

## 3) Select "Tender Type"



Code	Description	Category	Over Tender	Is Bankable	Value	EFT	Open Drawer
CP5	Coupon 5	False	False	False	R5.00	False	True
CT	Cash	False	True	True	R5.00	False	True
CI	...More	True	False	False	R5.00	True	False
DC	Debit Card	True	False	False	R5.00	True	True
DC1	Debit Card 1	False	False	False	R5.00	True	False
DC2	Debit Card 2	False	False	False	R5.00	True	False
DC3	Debit Card 3	False	False	False	R5.00	True	False
DC4	Debit Card 4	False	False	False	R5.00	True	False
DC5	Debit Card 5	False	False	False	R5.00	True	False
DS	Discount	True	False	False	R5.00	False	True
DS1	Discount 1	False	False	False	R5.00	False	True
DS2	Discount 2	False	False	False	R5.00	False	True
DS3	Discount 3	False	False	False	R5.00	False	True
DS4	Discount 4	False	False	False	R5.00	False	True
DS5	Discount 5	False	False	False	R5.00	False	True
GV	Gift Voucher	True	False	False	R5.00	False	True
GV1	Loyalty	False	False	False	R5.00	False	True
GV2	Voucher 2	False	False	False	R5.00	False	True
GV3	Voucher 3	False	False	False	R5.00	False	True
GV4	Voucher 4	False	False	False	R5.00	False	True
GV5	Voucher 5	False	False	False	R5.00	False	True

- 4) Now you can either create a NEW tender type or just convert one of the Gift Card tender types into a Loyalty tender type. To convert "Voucher 1" to "Loyalty"
- Select "Voucher 1" or the code "GV1".
  - Now click on the "Edit" button in the bottom menu.
  - Change "Tender Description" to "Loyalty"
  - VERY IMPORTANT:** Tick the checkbox in the bottom left that says "Enable Token Group"
  - Select "Accept"

The screenshot shows the 'Loyalty Setup' configuration window. It is divided into several sections:

- Tender Information:** Tender Code is 'GV1', Tender Type is 'GV', and Tender Description is 'Loyalty'.
- Over Tendering Options:** 'Allow Over Tender' is checked. 'Lowest Allowable Over tender (LALO)' and 'Highest Allowable Over tender (HALO)' are both set to '0.00'.
- X Report Options:** 'Is Bankable' and 'Electronic Fund Transfer' are both checked.
- POS Options:** 'Ask for Expiry Date' is unchecked, 'Open Drawer' is checked. Under 'Fixed Value' (selected), the amount is '0.00'. 'Fixed Percentage' is unselected. 'Enable Token Group' is checked.
- Ledger Options:** 'Tender Post Type' has 'Post To Ledger' selected and 'Use as Stock Discount' unselected. 'Ledger Account: Receipts' and 'Ledger Account: Payments' are both set to '3700.000.000.00'.

An 'Accept' button with a green checkmark is located in the bottom right corner.

**Tip:**

To change the MAIN “Gift Card” button to show the word “Loyalty Card” instead, follow these instructions.

- Select “Utilities”
- Select “Setup”
- Select “Tender Type”
- Select “Gift Card” or the code “GV”.
- Now click on the “Edit” button in the bottom menu.
- Change “Tender Description” to “Loyalty Card”
- VERY IMPORTANT:** Tick the checkbox in the bottom left that says “Enable Token Group”

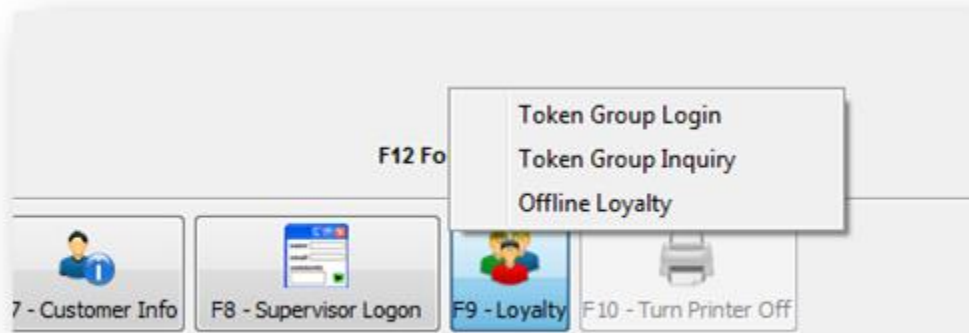
You done!



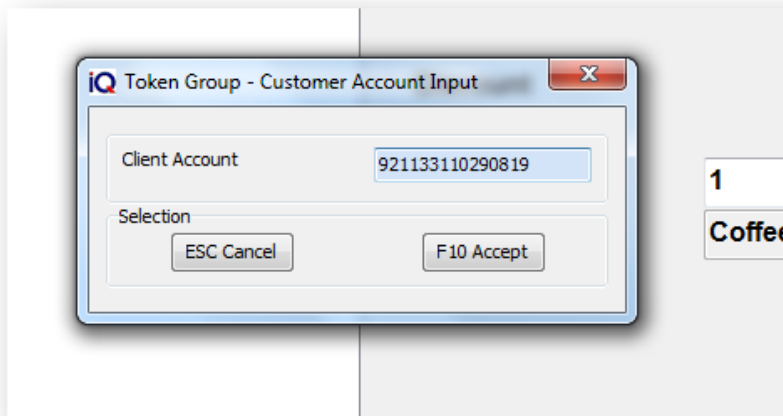
## Capturing a Loyalty Sale



- 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) Select “Token Group Login”

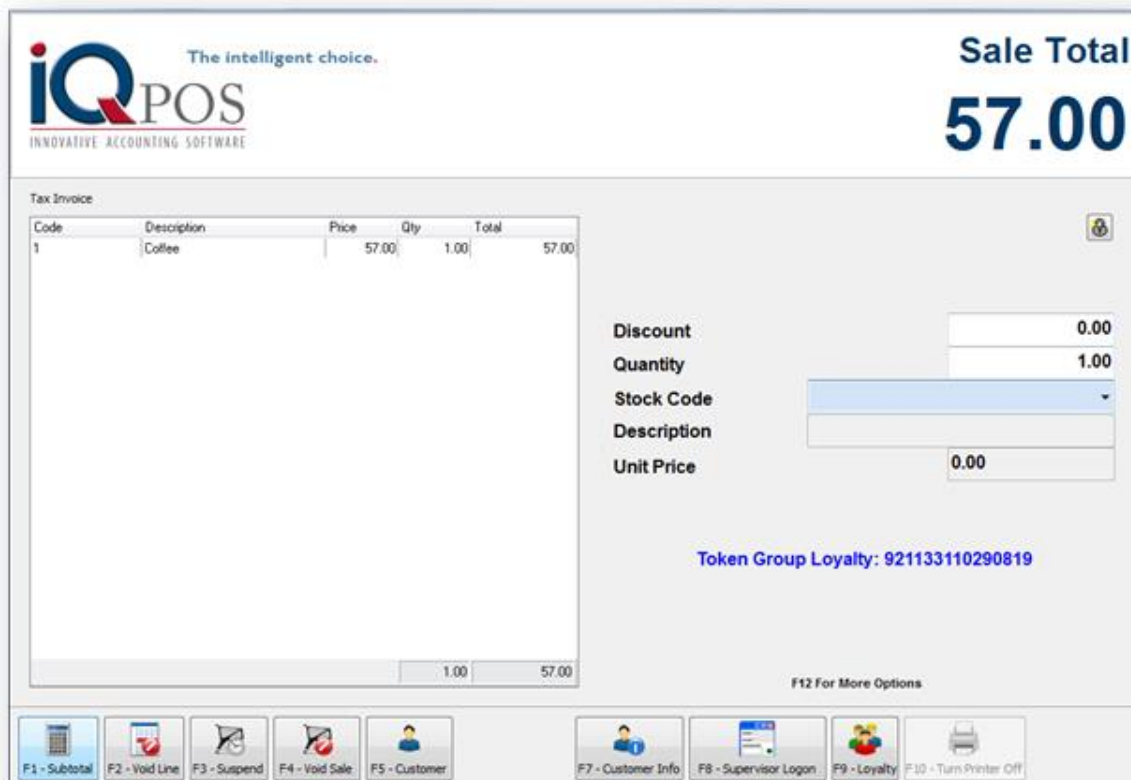


4) Enter in the customer's card number

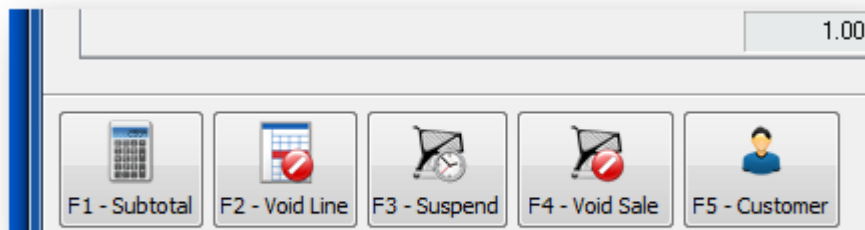


5) Push "F10" to accept

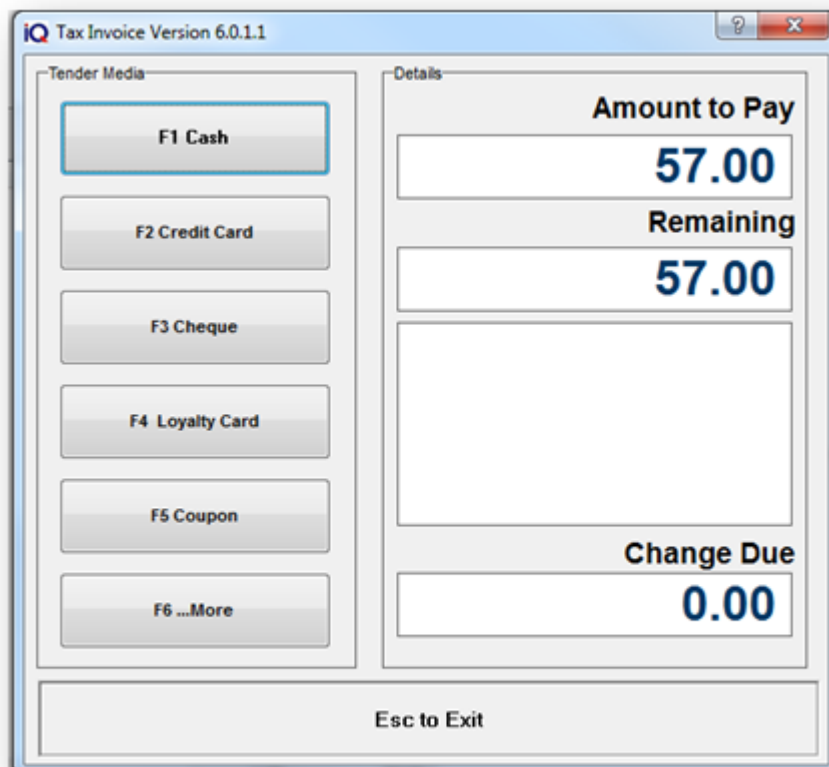
6) Now the customer's card number will show up on the POS screen.



- 7) If the customer's card number shows up on the screen, then you can proceed. Push "F1" to total up the sale.



- 8) Complete your sale as per normal, filling in whatever combinations of tender type you like.  
9) Then hit "Enter" to complete the sale.



10) The message, “Communicating with TokenGroup Server” will now appear for around 3 seconds and then the sale will be completed and the customer will have received their points/rewards allocated to their card.



**Sale Total**  
**0.00**

Tax Invoice				
Code	Description	Price	Qty	Total

**Sale Total**

**Total Tendered**

**Change**

**Press Enter to Continue**

E1. Cash E2. Void Line E3. Cancel E4. Void Sale E5. Customer

E7. Customer Info E8. Receipts List E9. Loyalty E10. Turn Printer Off

## Redeem Loyalty Points

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

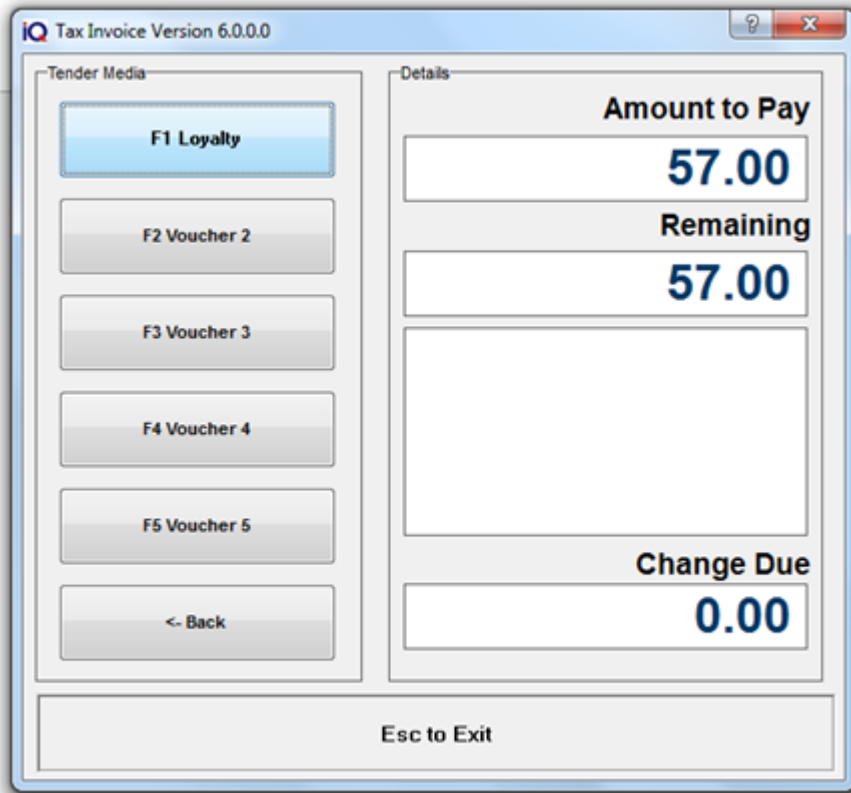
The screenshot shows a software window titled "iQ Tax Invoice Version 6.0.1.1". It is divided into two main sections: "Tender Media" on the left and "Details" on the right. The "Tender Media" section contains six buttons: "F1 Cash", "F2 Credit Card", "F3 Cheque", "F4 Loyalty Card", "F5 Coupon", and "F6 ...More". The "F1 Cash" button is highlighted with a blue dashed border. The "Details" section displays three payment-related fields: "Amount to Pay" with a value of 57.00, "Remaining" with a value of 57.00, and "Change Due" with a value of 0.00. At the bottom of the window, there is a button labeled "Esc to Exit".

Tender Media	Details
F1 Cash	Amount to Pay: 57.00
F2 Credit Card	Remaining: 57.00
F3 Cheque	
F4 Loyalty Card	
F5 Coupon	
F6 ...More	Change Due: 0.00

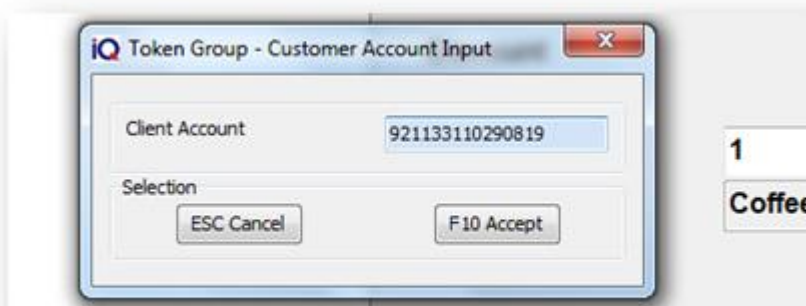
Esc to Exit

- 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 and select "F10" to accept.



- 5) You will now see the Loyalty value show up IF there were sufficient funds(points) available. You can then select additional tender types to make up the balance of the total.
- 6) Hit enter to complete the sale.

The screenshot shows a software window titled "iQ Tax Invoice Version 6.0.0.0". The window is divided into two main sections: "Tender Media" on the left and "Details" on the right. At the bottom, there is a large button labeled "Esc to Exit".

**Tender Media**

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

**Details**

**Amount to Pay**  
57.00

**Remaining**  
32.00

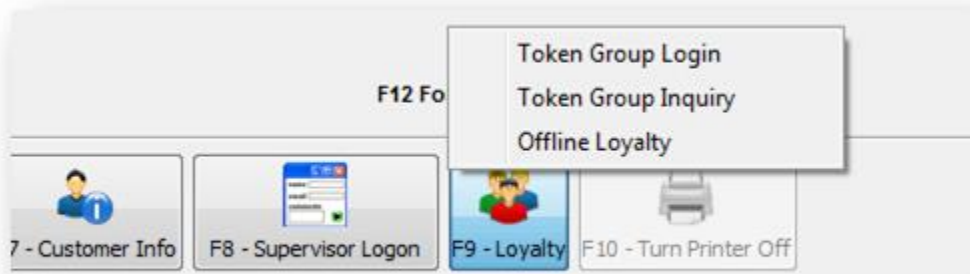
Loyalty R25.00

**Change Due**  
0.00

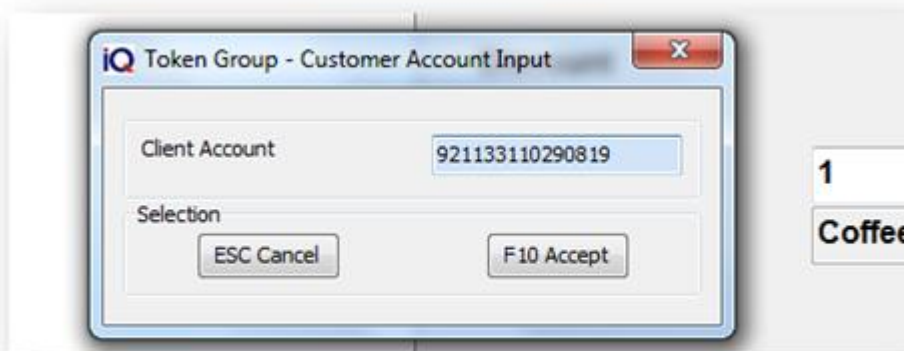
7) The points redeemed will now be removed off the customers card.

## Balance Enquiry

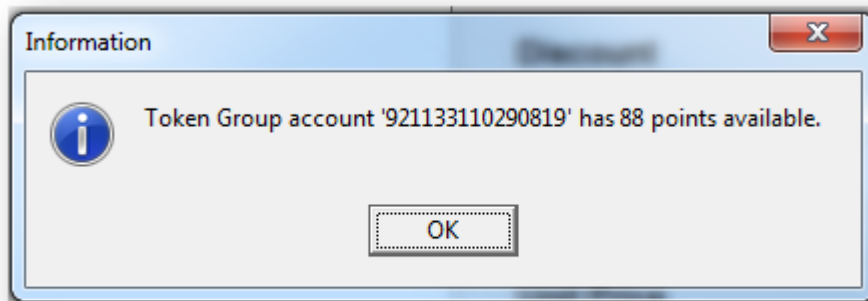
Used when a customer wants to know their points balance.



- 1) Select "F9-Loyalty" from the POS screen.
- 2) Select "Token Group Inquiry"
- 3) Enter in the customer's card number
- 4) Push "F10" to accept and the balance will be shown.



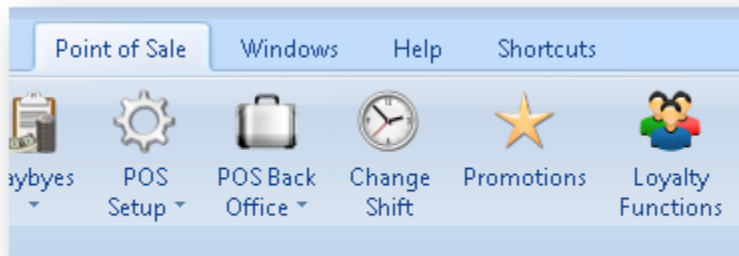




## Enrolling a Customer

Used when a new customer joins the program


1. Point of sale > Loyalty Functions



2. Click Enroll



3. Fill out the customers details (Add their Cellphone number into "Telephone Number 1") > Click Accept

Account Details		Address Details	
Account Number	2703100008044010	Postal Address	
Name	Candice Smith		
Title			
Initials			
I.D. Number			
Birth Date	05/02/1992	Delivery Address	
Contact			
Telephone Number 1	0846721094		
Telephone Number 2			
Cellphone Number			
Fax			
E-Mail Address			
		Communication	
		SMS	<input checked="" type="checkbox"/>
		Email	<input type="checkbox"/>
			

The customer is now enrolled in your loyalty program.

## 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](mailto:support@theloyaltybox.com)