



Version 1

# POS Control – 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

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

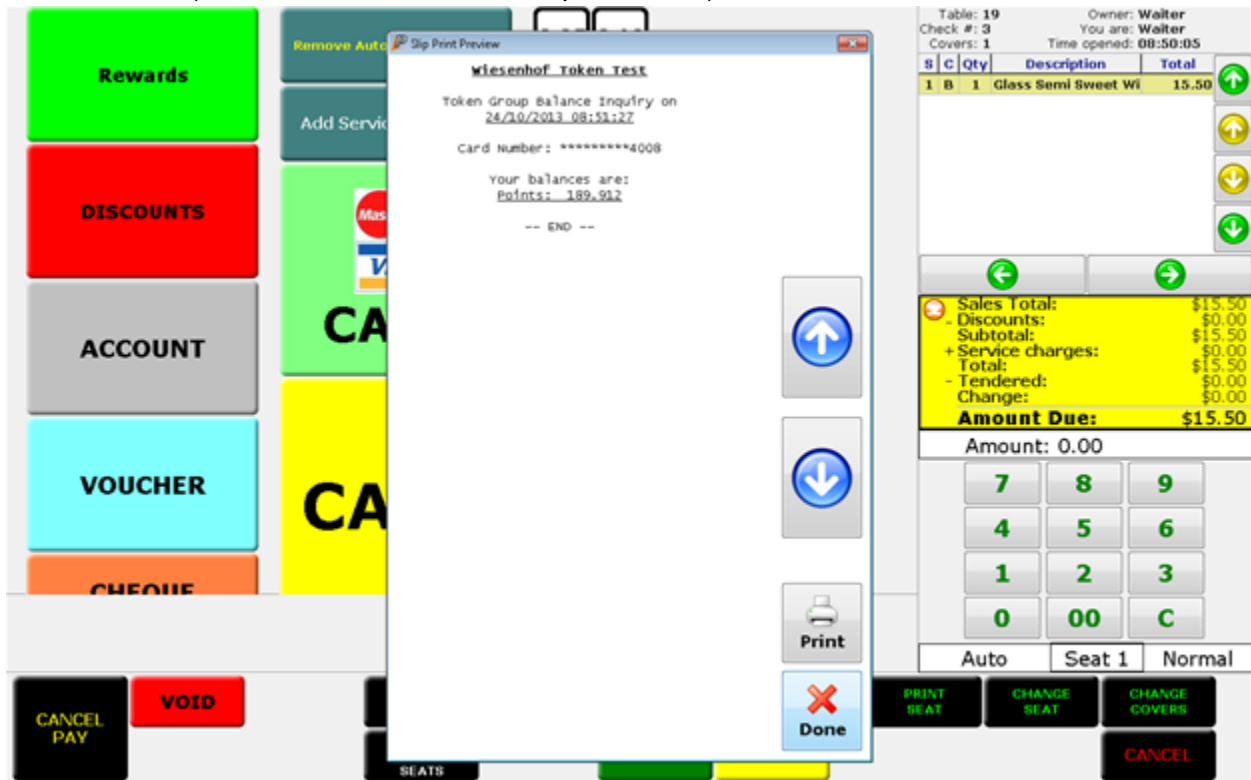
1. Treat as normal sale → Select Table number → amount of people at table → select order → Click Pay → Select Yes when the below screen comes up (NOTE: Once you have clicked no you CANNOT go back)



2. Enter in The customer's Cell/Card Number → Click Done



3. Click Done (You can see the customers points here)



4. Finish off the sale as per normal

## Redeem Loyalty Points

1. Treat sale as per normal, When the customer wants to pay → Click Rewards

The screenshot shows the POS interface with the 'Rewards' menu highlighted in green. The menu includes options for 'Remove Auto Service Charge', 'Add Service Charge %', 'CARD' (with MasterCard and VISA logos), and 'CASH'. A numeric keypad is visible with values 0.05, 0.10, 0.20, 0.50, 1, 2, 5, 10, 20, 50, and 100. The bottom bar contains buttons for 'CANCEL PAY', 'VOID', 'PRINT', 'PRINT WITH SEATS', 'ORDER', 'ORDER & CONTINUE', 'PRINT SEAT', 'CHANGE SEAT', 'CHANGE COVERS', and 'CANCEL'.

S	C	Qty	Description	Total
1	B	1	Amstel	17.00

Sales Total:	\$17.00
- Discounts:	\$0.00
Subtotal:	\$17.00
+ Service charges:	\$0.00
Total:	\$17.00
- Tended:	\$0.00
Change:	\$0.00
<b>Amount Due:</b>	<b>\$17.00</b>

Amount: 0.00

7 8 9  
4 5 6  
1 2 3  
0 00 C

Auto Seat 1 Normal

2. Select Points

The screenshot shows the 'Select a discount' dialog box with options for 'Points', 'Promotion %', 'Promotion R', 'Staff %', and 'Staff R'. A 'Cancel' button is at the bottom right of the dialog. The background shows the same POS interface as in the previous screenshot.

S	C	Qty	Description	Total
1	B	1	Amstel	17.00

Sales Total:	\$17.00
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Subtotal:	\$17.00
+ Service charges:	\$0.00
Total:	\$17.00
- Tended:	\$0.00
Change:	\$0.00
<b>Amount Due:</b>	<b>\$17.00</b>

Amount: 0.00

7 8 9  
4 5 6  
1 2 3  
0 00 C

Auto Seat 1 Normal

3. Enter in the amount that the customer wants to redeem

The screenshot shows the POS interface with a central dialog box titled "Enter amount" displaying "17.00". The dialog has a numeric keypad (0-9, ., C) and buttons for "Done" and "Cancel". In the background, there are several buttons: "Rewards" (green), "DISCOUNTS" (red), "ACCOUNT" (grey), "VOUCHER" (cyan), "CHEQUE" (orange), "Remove Auto Service Charge" (teal), "Add Service Charge" (teal), "CARD" (green with Visa/MasterCard logos), "CASH" (yellow), "CANCEL PAY" (black), "VOID" (red), "PRINT" (black), "PRINT WITH SEATS" (black), "ORDER" (green), "ORDER & CONTINUE" (yellow), "PRINT SEAT" (black), "CHANGE SEAT" (black), "CHANGE COVERS" (black), and "CANCEL" (black). On the right, a summary screen shows: Table: 19, Check #: 7, Covers: 1, Owner: Waiter, You are: Waiter, Time opened: 09:05:38. A table lists items: 1 B 1 Amstel 17.00. Below that, a summary shows: Sales Total: \$17.00, Discounts: \$0.00, Subtotal: \$17.00, + Service charges: \$0.00, Total: \$17.00, - Tendered: \$0.00, Change: \$0.00, Amount Due: \$17.00. The current amount is 0.00.

4. Click Accept to end off

The screenshot shows the POS interface with a dialog box titled "Accept" containing "Accept" and "Cancel" buttons. The background shows a summary screen with: Total Tendered: \$0.00, Inclusive Tips: \$0.00, Change Due: \$0.00. The summary screen also shows: Table: 19, Check #: 7, Covers: 1, Owner: Waiter, You are: Waiter, Time opened: 09:05:38. A table lists items: 1 B 1 Amstel 17.00, 1 - 1 CASH 0.00, 1 - 1 Points 17.00, 1 - 1 0832614008 0.00. Below that, a summary shows: Sales Total: \$17.00, Discounts: \$17.00, Subtotal: \$0.00, + Service charges: \$0.00, Total: \$0.00, - Tendered: \$0.00, Change: \$0.00, Amount Due: \$0.00. The current amount is 0.00. The "Accept" button is highlighted with a green checkmark.



## Balance Enquiry

Used when a customer wants to know their points balance.

1. Click the green manager function button → Click more reports → Click Token Group Inquiry



2. Enter in the customer's cell number/card number → Click Done
3. The customer's balance will come up on the screen

## Support

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

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