



Version 1

# Pilot – 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. Once you have selected the method of payment this screen will pop up automatically > Select Loyalty Box

<b>OTHER</b>
<b>LOYALTYBOX</b>
<b>Done</b>

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

Loyalty Transaction

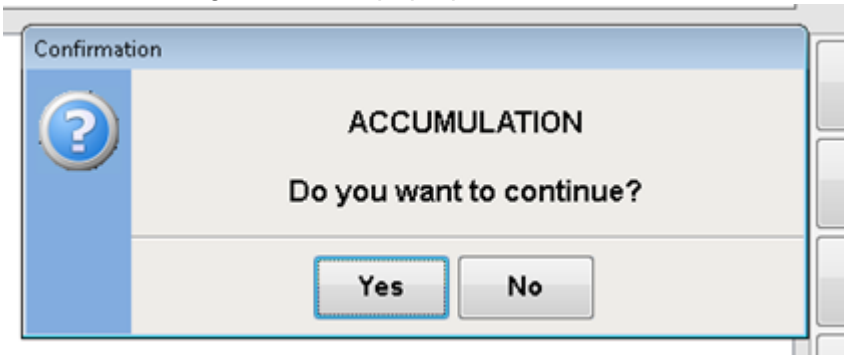
 **Accumulation**

If your business could talk, what would it say?

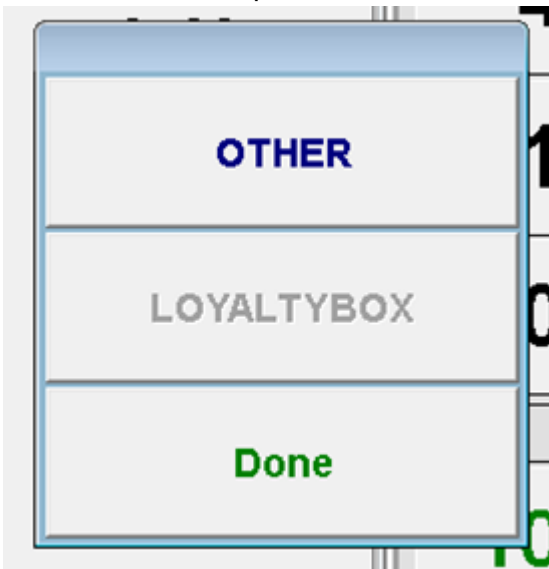
Billing Information			
Invoice No	Bill Amount	Table No	Waiter
<b>18092</b>	<b>376.00</b>	<b>002</b>	<b>CHRIS (2)</b>

<b>Card Number(s)</b>	
<b>0718982989</b>	✓

4. The following screen will pop up > Click Yes



5. Click done and proceed as normal



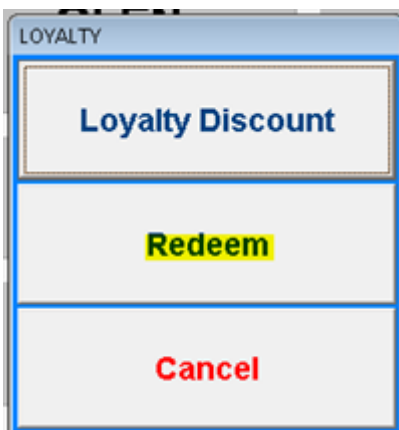
## Redeem Loyalty Points

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




3. Click Redeem



4. Type in the customer's membership/cell number → Enter

Loyalty Transaction



### Loyalty Redeem

Billing Information			
Invoice No	Bill Amount	Table No	Waiter
18093	199.00	022	CHRIS (2)

Card Number(s)	
0718982989	✓

5. Enter in the amount that you would like to redeem → Enter

Card Number(s)	Balance	Points	Auth Code	Redeem Amount	
0718982989		0.00	11072154	50.00	✓

6. The following will pop up → Click yes

Confirmation



**LOYALTY REDEEM**

Do you wish to continue?

7. You can continue to close off the sale



## Balance Enquiry

Used when a customer wants to know their points balance.

1. Select Waiter Menu




2. Click Loyalty Balance



3. Type in the customer account number/cell number → Enter

Loyalty Transaction



**Balance Enquiry**

Billing Information			
Invoice No	Bill Amount	Table No	Waiter
---	<b>0.00</b>	---	--- (---)

Card Number(s)

0718982989	✓
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4. The balance will show up here

Card Number(s)	Balance	Points	Auth Code	
0718982989		<b>0.00</b>	<b>11072330</b>	✓

## Discounts

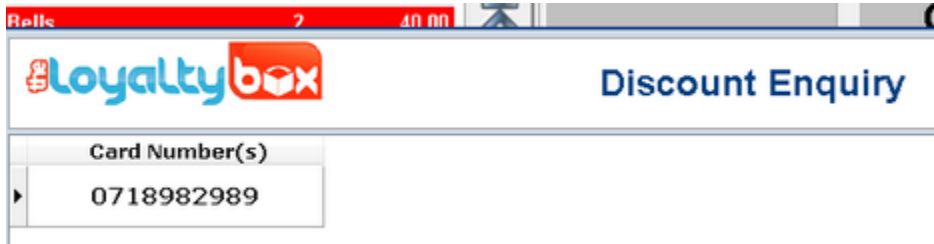
1. Before you close the sale off you select Loyalty/Gift Card



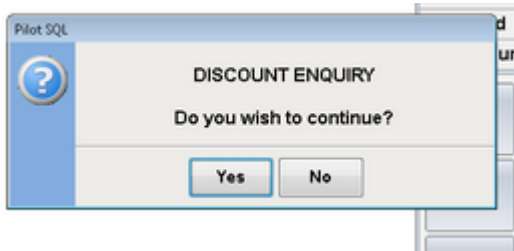
2. And then Discount enquiry



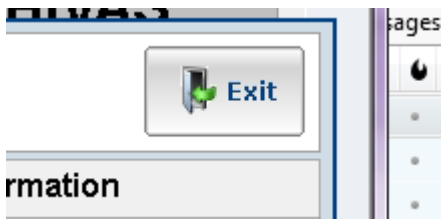
3. Then you Swipe the card or type the number in



4. Select Yes



5. Click exit



8. You then close your bill off as usual, It will have automatically worked out the discount and will ask the customer for the correct amount

## 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)