



Version 1

Admin Area – Birthday Voucher Setup

THE LOYALTY BOX is the name of Token Group's Merchant Management platform. It is a combination of world-class technology, backed by a professional support team ensuring that your program is a success.

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How To Create A Birthday Voucher Campaign

Click Campaigns → Click new campaign.

Details:

- Name- “Stores name” Birthday Voucher
- Campaign Type- Tick Trigger campaign.
- Description- Leave open
- Status- Active
- Click Save.
- Go to “View/Edit”

Details	Campaign Schedule	Campaign Format	Conditions	Actions
Details				
Name:	<input type="text" value="Michelle's Demo Store Birthday Voucher"/>			
Campaign Type:	<input type="radio"/> Bulk Campaign <input checked="" type="radio"/> Trigger Campaign			
Description:	<input type="text"/>			
Status:	<input type="text" value="Active"/>			
<input type="button" value="Save"/>	<input type="button" value="Close"/>			

Campaign Schedule:

- Start Date- 2016/04/01 (Put in the start date of preference.)
- End Date- 2096/06/15 (Put in end date of preference, if no end date is needed put in date provided.)
- Days/Times- Choose days that the voucher should run and put in preferred times for the vouchers to be sent out.
- Run Count- Should remain on 0
- Click Save.

Details	Campaign Schedule	Campaign Format	Conditions	Actions
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Campaign Schedule

Start Date:
Date the campaign starts

End Date:
Date the campaign ends

Days / Times:
Days and times the campaign should run

Day	Start	End
<input checked="" type="checkbox"/> Sunday	<input type="text" value="08:00"/>	<input type="text" value="20:00"/>
<input checked="" type="checkbox"/> Monday	<input type="text" value="08:00"/>	<input type="text" value="20:00"/>
<input checked="" type="checkbox"/> Tuesday	<input type="text" value="08:00"/>	<input type="text" value="20:00"/>
<input checked="" type="checkbox"/> Wednesday	<input type="text" value="08:00"/>	<input type="text" value="20:00"/>
<input checked="" type="checkbox"/> Thursday	<input type="text" value="08:00"/>	<input type="text" value="20:00"/>
<input checked="" type="checkbox"/> Friday	<input type="text" value="08:00"/>	<input type="text" value="20:00"/>
<input checked="" type="checkbox"/> Saturday	<input type="text" value="08:00"/>	<input type="text" value="20:00"/>

Run Count:
The number of times the system will run during the above days / times.
Leave 0 for no limit.

Campaign Format:

- Click SMS (This is optional)
- Volume Restrictions- Leave both as 0.
- Time Restrictions- Choose the start time to run an hour before the set time in “Campaign Schedule” and the end time the same time as chosen in “Campaign Schedule”
- Expiry- Leave as a 0
- Append Fields- Set as Firstname.
- SMS text- Put in the message you want the client to receive with the voucher.

Details
Campaign Schedule
Campaign Format
Conditions
Actions

Campaign Format

Email
 SMS
 In-App Message
 App Push Message

SMS

Volume Restrictions:
Don't send the message if the volume of messages exceeds the set amount for the given period (leave zero for no restriction).

Volume (count)
 Period (hrs)

Time Restrictions:
Only send the message on selected days between the specified times.

Day	Start	End
<input checked="" type="checkbox"/> Sunday	07:00	20:00
<input checked="" type="checkbox"/> Monday	07:00	20:00
<input checked="" type="checkbox"/> Tuesday	07:00	20:00
<input checked="" type="checkbox"/> Wednesday	07:00	20:00
<input checked="" type="checkbox"/> Thursday	07:00	20:00
<input checked="" type="checkbox"/> Friday	07:00	20:00
<input checked="" type="checkbox"/> Saturday	07:00	20:00

Expiry:
If not sent within the specified days remove the message. (Leave zero for no expiry)

Append Fields:
Select a field to append to the SMS text

SMS Text:
-5 characters remaining

Happy Birthday #firstname#! Michelle's Demo Store wants you to celebrate with us with a \$100 birthday voucher. Valid for 30 days at any Michelle's Demo Store branch.

Conditions:

- If “All” of the following conditions are “True”
- Add Condition.
- If “All” of the following conditions are “True”
- Category- Programs
- Operator- Is one of
- Value- Tick the second box.
- Click Save

Details Campaign Schedule Campaign Format **Conditions** Actions

Conditions

If of the following conditions are :

Category:

Operator:

Value: (Un)Select All
 Michelle's Demo Store

- Add Condition,
- If “All” of the following conditions are “true”
- Category- Birthday
- Days Prior- Leave as 0
- Click save

Details Campaign Schedule Campaign Format **Conditions** Actions

Conditions

If of the following conditions are :

Category:

Days Prior:
The birthday message will be sent the specified number of days prior to the customers birthday. Leave as 0 for on the day.

Action:

- Click “New action”
- Select Action- Voucher
- Card Set- Which ever card will be used e.g. Michelle’s Test Card
- Description- Enter the voucher description.
- Value Types- Select the value type point must be added to.
- Amount- Enter the amount the voucher should give the client.

Details	Campaign Schedule	Campaign Format	Conditions	Actions
Actions				
Select Action:	<input type="text" value="Voucher"/>			
Card Set: Select the card set must be added to.	<input type="text" value="Michelle Test Card"/>			
Description: Enter the voucher description.	<input type="text" value="Bday"/>			
Value Type: Select the value type points must be added to.	<input type="text" value="Michelle's Demo Store - Points"/>			
Amount: Enter amount / percentage	<input type="text" value="0"/>			
<input type="button" value="Save"/>	<input type="button" value="Close"/>			
<input type="button" value="Save"/>	<input type="button" value="Close"/>			

How to set up the rule:

- Click “Rules”
- Click “New Rule”

Settings:

- Title- Enter the title you would like to give your rule.
- Program- Select the program of your store.
- Customer Birthday- Leave unticked.
- Rules occurs- Tick “Per Transaction”
- Rule Priority- use the number 1
- Status- Set as enabled.

SETTINGS	OCCURRENCE	LOCATION	GROUP	SCHEDULE	PRODUCT(S)
Settings					
Title: Enter a rule title	<input type="text" value="Voucher Response"/>				
Program: Select a program	<input type="text" value="Michelle's Demo Store"/>				
Customer Birthday: Rule fires only if customers birthday	<input type="checkbox"/>				
Rule Occurs: Select when the rule occurs	<input checked="" type="radio"/> Per Transaction <input type="radio"/> Based On Occurrence				
Rule Priority: Enter the Rule Priority	<input type="text" value="1"/>				
Status: Set the rule status	<input type="text" value="Enabled"/>				

Occurrence:

- Nothing needs to be done here.

Locations:

- Clients- e.g Michelle's Demo Store
- Location- Tick Second box

SETTINGS OCCURRENCE LOCATIONS GROUP SCHEDULE

Locations

Michelle's Demo Store

Clients: Michelle's Demo Store

Location: Select All Michelle's Demo Store

Add

Save Back

Groups:

- Nothing needs to be done here.

Schedule:

- Nothing needs to be done here.

Products:

- Nothing needs to be done here.

Card sets:

- Card details - Card sets - Tick All

Rule save successful

SETTINGS	OCCURRENCE	LOCATION	GROUP	SCHEDULE	PRODUCT(S)	CARD SETS
<h3>Card Details</h3> <p>Card Sets:</p> <p><input checked="" type="checkbox"/> Michelle Test Card</p> <p><input checked="" type="checkbox"/> Michelle Test Card</p>						

Save

Back

Card Groups:

- Nothing needs to be done here.

Transactions:

- Tender Type- Tick All.
- Transaction Types- Tick “Balance Inquiry” and “Promotion redemption (Uncommitted)”

SETTINGS	OCCURRENCE	LOCATION	GROUP	SCHEDULE	PRODUCT(S)	CARD SETS	CARD GROUPS	TRANSACTION																		
<h3>Transaction Details</h3> <p>Tender Type: Select the type of tender</p> <p><input checked="" type="checkbox"/> Promo <input checked="" type="checkbox"/> Gift <input checked="" type="checkbox"/> Loyalty <input checked="" type="checkbox"/> Credit <input checked="" type="checkbox"/> Debit <input checked="" type="checkbox"/> Cash</p> <p>Transaction Types: Select the transaction type</p> <table> <tr> <td><input type="checkbox"/> Account History</td> <td><input type="checkbox"/> Gift Issuance</td> <td><input type="checkbox"/> LineItem_Refund</td> <td><input type="checkbox"/> Loyalty Redemption (Uncommitted)</td> <td><input type="checkbox"/> Promotion Redemption (Committed)</td> <td><input type="checkbox"/> Update Card Details</td> </tr> <tr> <td><input checked="" type="checkbox"/> Balance Inquiry</td> <td><input type="checkbox"/> Gift Redemption</td> <td><input type="checkbox"/> Loyalty Issuance</td> <td><input type="checkbox"/> Multiple Issuance</td> <td><input checked="" type="checkbox"/> Promotion Redemption (Uncommitted)</td> <td><input type="checkbox"/> Update Client</td> </tr> <tr> <td><input type="checkbox"/> Enrollment Redemption</td> <td><input type="checkbox"/> Line Item Redemption</td> <td><input type="checkbox"/> Loyalty Redemption</td> <td><input type="checkbox"/> Promotion Issuance</td> <td><input type="checkbox"/> Transfer</td> <td><input type="checkbox"/> Void</td> </tr> </table>									<input type="checkbox"/> Account History	<input type="checkbox"/> Gift Issuance	<input type="checkbox"/> LineItem_Refund	<input type="checkbox"/> Loyalty Redemption (Uncommitted)	<input type="checkbox"/> Promotion Redemption (Committed)	<input type="checkbox"/> Update Card Details	<input checked="" type="checkbox"/> Balance Inquiry	<input type="checkbox"/> Gift Redemption	<input type="checkbox"/> Loyalty Issuance	<input type="checkbox"/> Multiple Issuance	<input checked="" type="checkbox"/> Promotion Redemption (Uncommitted)	<input type="checkbox"/> Update Client	<input type="checkbox"/> Enrollment Redemption	<input type="checkbox"/> Line Item Redemption	<input type="checkbox"/> Loyalty Redemption	<input type="checkbox"/> Promotion Issuance	<input type="checkbox"/> Transfer	<input type="checkbox"/> Void
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Save

Back

POS Transactions:

- Nothing needs to be done here.

Balance:

- Nothing needs to be done here.

Rules:

- Nothing needs to be done here.

Action:

- Click “New Action”
- Priority- Set as 1.
- Max Run Times- Set as 0
- Select action- Set as “Voucher Balance”
- Card Set- e.g Michelle's Test Card

SETTING #	OCCURRENCE	LOCATION #	GROUP	SCHEDULE	PRODUCT(S)	CARD SET #	CARD GROUP #	TRANSACTION #	POS TRANSACTION #	BALANCE	RULE #	ACTION
Actions												
Priority:	<input type="text" value="1"/>											
Max Run Times: <small>0 = Disabled</small>	<input type="text" value="0"/>											
Select Action:	<input type="text" value="VoucherBalance"/>											
Card Set: <small>Select the card set must be added to.</small>	<input type="text" value="Michelle Test Card"/>											
<input type="button" value="Save"/> <input type="button" value="Close"/>												

Support

If you have any questions, please contact Token Group on 010 020 0601 or on support@theloyaltybox.com