Loyalty Rewards Program

Loyalty Rewards

Definition

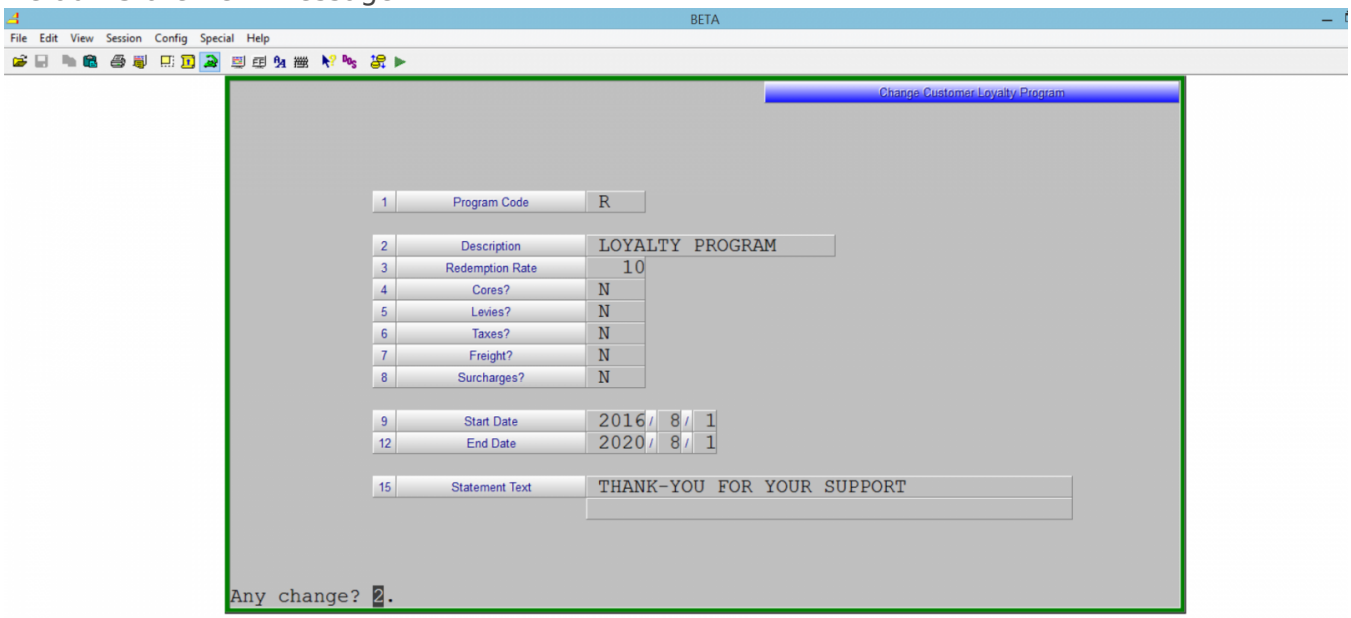
The new LOYALTY REWARDS program will allow you to offer and track point rewarded to customers for purchases made. This program can be for selected customers and products and the rewards value can be maintained by Category.

The new suite of programs is available through **Sales Desk > Administration >**

Loyalty Rewards

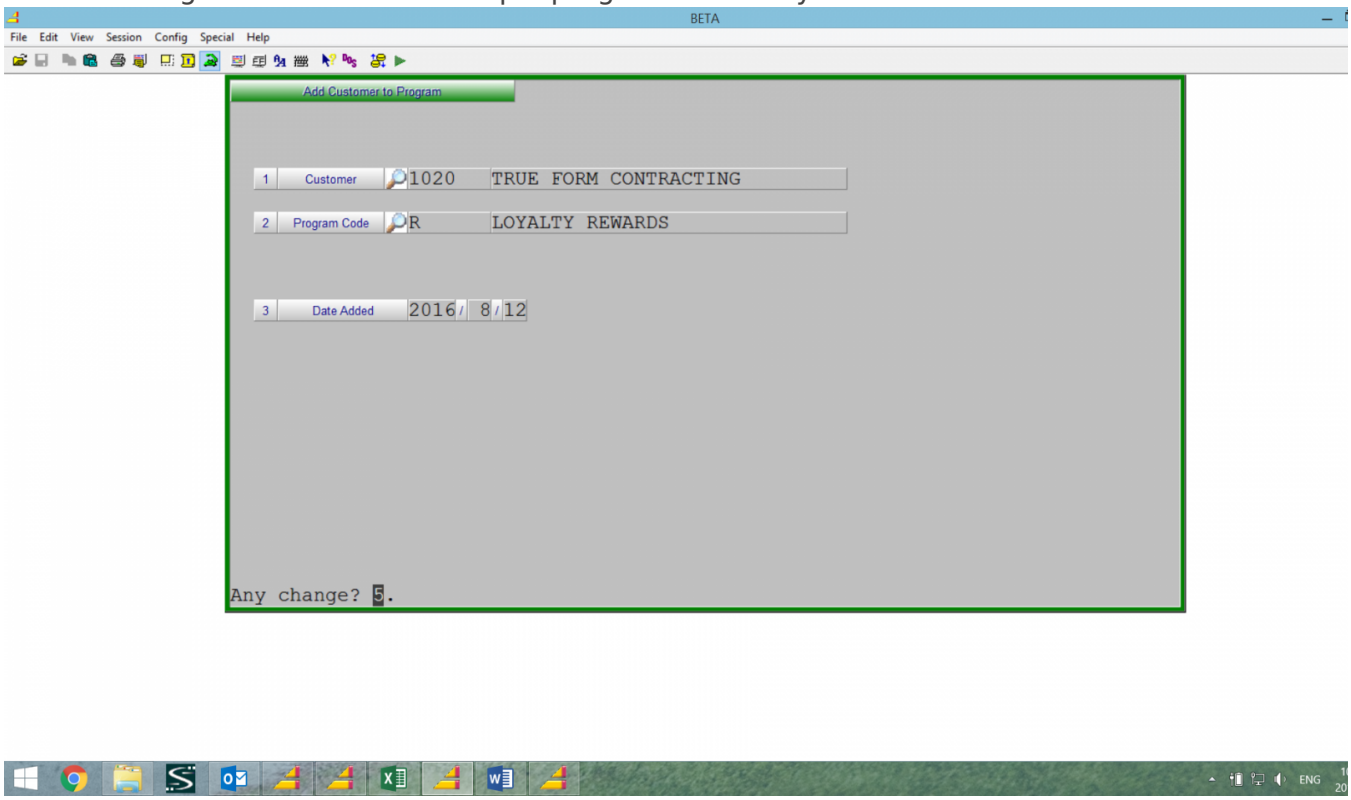
Loyalty Programs

- Assign a Program Code for customers to be included in the program
  - Setup a Type Code which will be assigned to Customers included in the program such as “R”
  - Add a Description for the program
- Default Redemption Rate for the program, points per dollar
  - There is no automatic Redemption at this time
- Extra charges to be included in the value such as Taxes and Levies
  - The initial default for this setting is “N”
- Default Statement Message



Loyalty Customers

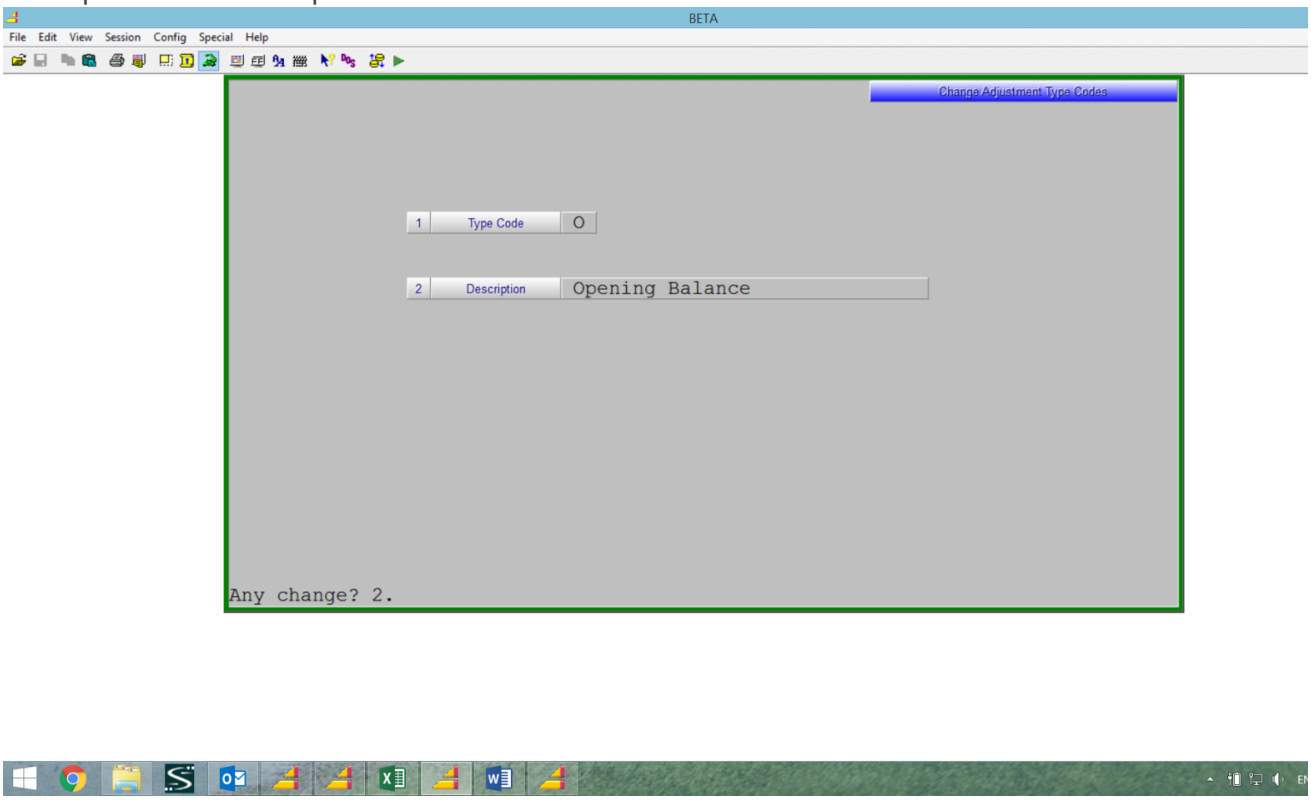
- Add, Change or Delete Customers from a Loyalty Program
- You can assign a customer to multiple programs should you choose.



Loyalty Adjustment Codes

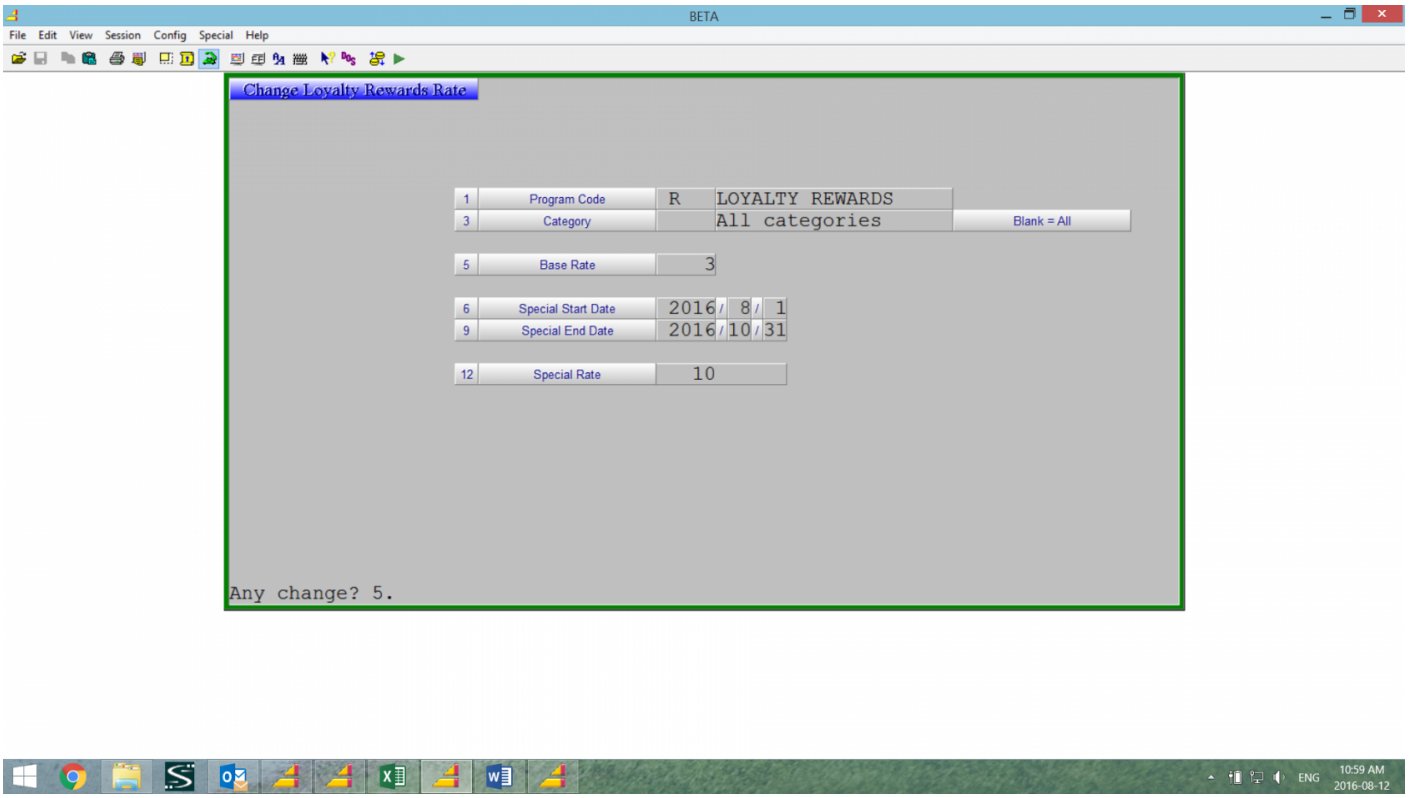
- Used to setup codes and descriptions of the various adjustment types required.

- Example RE = Redemption



Loyalty Rates

- This is to assign the reward rates for various categories.
- Using an “All Category” entry could setup the default and then you could setup individual categories as exceptions.
- The Start and End Dates control the time that the Special Rate is in effect.
- The rate is the number of points earned per sales dollar.
  - Only those extra charges set to Y for the program would be included in the sales total.



Loyalty Reward Adjustments

- To make adjustments to a customer total point not related to sales invoices
  - Used to assign the initial start point and to adjust for point redemptions

Loyalty Rewards Inquiry

- View the current status of a customer’s Loyalty Rewards points and the activity

Loyalty Rewards Report

- A listing of the customer’s Loyalty Rewards point activity

Loyalty Rewards Statement

- Similar to a customers A/R statement showing their activity and balance.
  - These Loyalty Reward statements can also be emailed to the customer.

> Once the customers have been assigned to the program and the rates have been setup the point information can be built from invoice history from a start date if desired.

Invoicing

- When an invoice is generated for a customer included in the program their Loyalty Rewards will be updated when the invoice is completed and the current Loyalty Reward total can be printed on the invoice.

Revision #1
Created 2021-09-17 00:04:23 UTC by Jim
Updated 2021-10-04 16:37:47 UTC by Jim