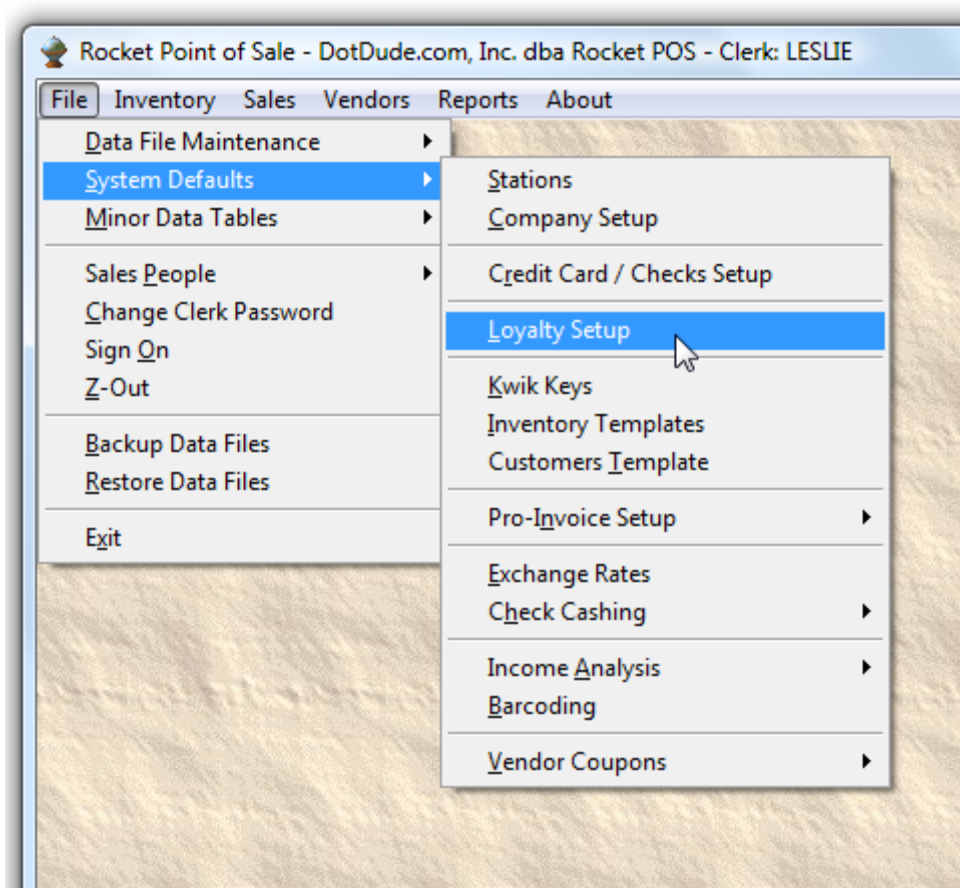


# Using the Customer Loyalty feature of Rocket POS



The Customer Loyalty feature within the Rocket Point of Sale is a way of rewarding your customers to continue shopping with your store or business. The Customer Loyalty program is easy to configure and works as you do sales to your customers. You set how many points a customer gets per dollar value of a sale. You set a goal and during the sale if the customer has reached the goal previously from other sales, they can use their points as cash to help pay for the sale they are now doing. The Customer Loyalty was designed to work with the Pro-Invoice screen ONLY.

Please read this ENTIRE manual to fully understand how the Customer Loyalty program works. It's your money and you want to make sure everything is configured correctly so as not to **Give Away The Farm**.

To get to the setup screen for the Customer Loyalty – follow the menu options as shown above. This will take you to the screen shown below.

If you check the **Use the Customer Loyalty Feature** – this turns on the Customer Loyalty program within the POS. The below describes the option settings;

**Discounted Items Allowed to Generate Points:** if you don't want to give points for items that you have marked for discount or items marked down during a sale, make sure this option is NOT checked.

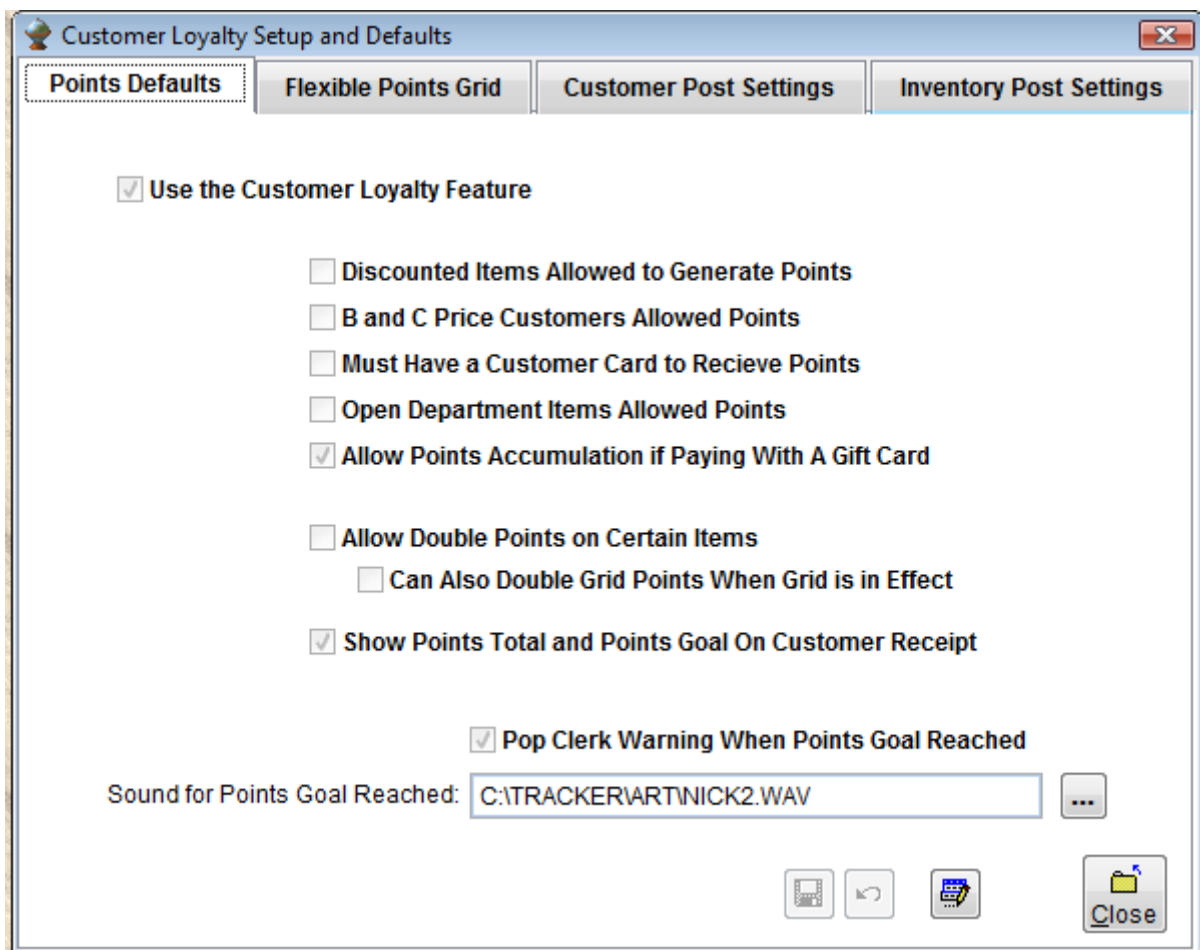
**B and C Price Customers Allowed Points:** if you want your level B and level C purchasing customer to be able to receive and use points, check this option.

**Must Have a Customer Card to Receive Points:** if you require a customer to have a Customer Loyalty card in order to receive Loyalty points, check this option. (see the end of this manual for explanation of Customer Cards)

**Open Department Items Allowed Points:** if you want Open Department items to generate points for your customers, check this feature.

**Allow Points Accumulation if Paying With A Gift Card:** if you do NOT want a customer to get Loyalty points during a certain sale if they are using a Gift Card to pay, make sure this option is NOT checked. If this item is checked, before tendering a clerk will be presented with a pop-up window to ask the customer if they plan on using a Gift Card to pay for this purchase.

**Allow Double Points on Certain Items:** if you'd like certain items to be Double Points, check this box. This allows you to advertise items as specials. See further in this manual for more on double points.



**Can Also Double Grid Points When Grid is in Effect:** if you are allowing double points and the Grid is active during a certain period, this will also allow the grid to be effective. Be careful here, if the grid is

set to triple points and the doubling is active you will give the customer 6 times the normal points for a sale.

**Show Points Total and Points Goal on Customer Receipt:** if you want the Customer Loyalty point's information to show up on the customer's receipt, check this setting.

**Pop Clerk Warning When Points Goal Reached:** during the sale, if the customer has enough points to use as a reward and the invoice total reaches the point where it's total exceeds the value given back a warning will appear to the clerk to ask if the customer wants to use their Customer Loyalty points for part of this sale.

**Sound for Points Goal Reached:** you can set a WAV file to play once a clerk has reached a threshold for using their prior points. We suggest a happy festive wav file.

## Flexible Points Grid

Loyalty Grid	Start	End	Level	Start	End	Level
Sunday	12:00	12:00	SINGLE	12:00	12:00	SINGLE
Monday	12:00	12:00	DOUBLE	12:00	12:00	SINGLE
Tuesday	12:00	12:00	SINGLE	12:00	12:00	SINGLE
Wednesday	12:00	12:00	TRIPLE	12:00	12:00	SINGLE
Thursday	12:00	12:00	DOUBLE	12:00	12:00	SINGLE
Friday	12:00	12:00	NONE	12:00	12:00	SINGLE
Saturday	12:00	12:00	SINGLE	12:00	12:00	SINGLE

Departments: IGNORE DEPART

Category: IGNORE CATS

Vendor: IGNORE VENDORS

(All Open Dept Items Will Be Skipped)

Clear Grid From ALL Inventory Items

Skip Blank Departments, Categories and Vendors

Apply Grid Settings to Inventory

Close

The Flexible Points Grid allow you to set certain items, departments, categories or vendor's products to receive special points rewards during certain times of the day on certain days of the week.

Check the check box that says **Use the Loyalty Grid** to activate the grid.

**IMPORTANT:** the Customer Loyalty feature uses the settings on the inventory screen and customer screen. By just checking the **Use the Loyalty Grid** really does nothing within your POS. These setting must be **PUSHED** out onto the inventory items. In other words you have to use the button



to PUSH what items you want to honor the Grid. This is also how the customer selections work. Use the appropriate buttons to clear or PUSH out to the customer files which customer gets points.



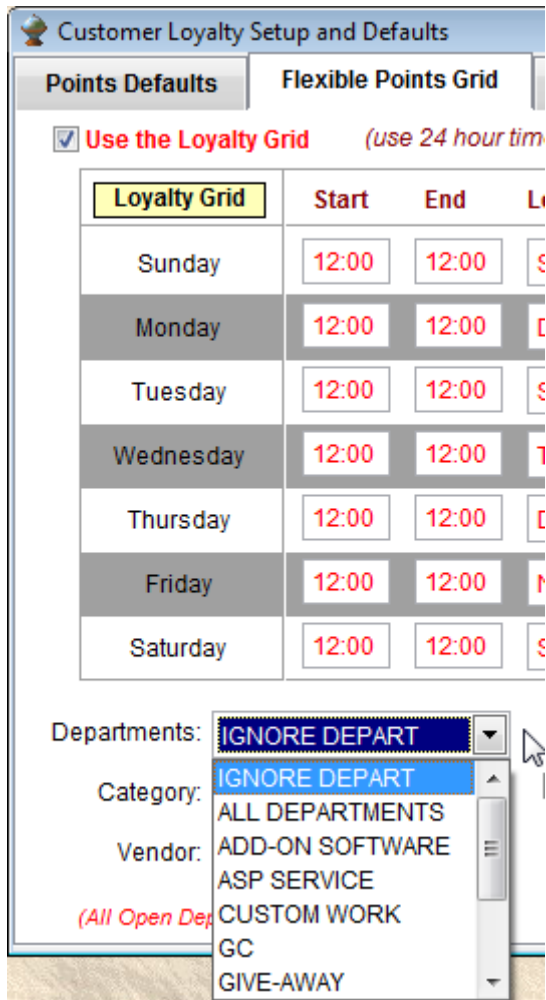
, of course you can go to each inventory item or customer and set the flags as you want. The shown buttons just make it easier to flag a large selection much faster.



the buttons found at the bottom of the page allows you to enter the Edit mode and change your settings (or cancel your changes) These buttons turns on ALL other buttons on this screen. Most OTHER buttons cannot be reversed once an action is done. You can on reverse changes actually on this screen.

**ALL SETTING PUSHES are cumulative!** In other words, if you select a certain department and do a Push (flag) of those items and then decide to do another department Push – the original items that were just flagged stayed flagged.


Small red warnings notes will show n certain screens depending on your setting from page one. Example: All open departments will be skipped or Only customers with Level A will be effected.

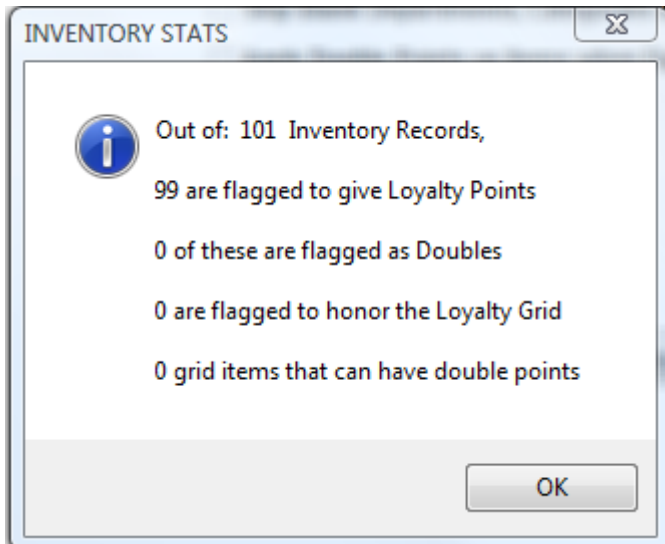


Make sure to use the military 24 hour clock when settings time within the grid. You can setup two different time periods a day to honor the grid.

**Don't Get Confused** – ONLY one grid is ever in effect. Don't think you can set a grid and Push it to certain items and the Push another grid layout to other items. It doesn't work that way. When you do a Push out to items, you are just saying to honor this ONE grid.

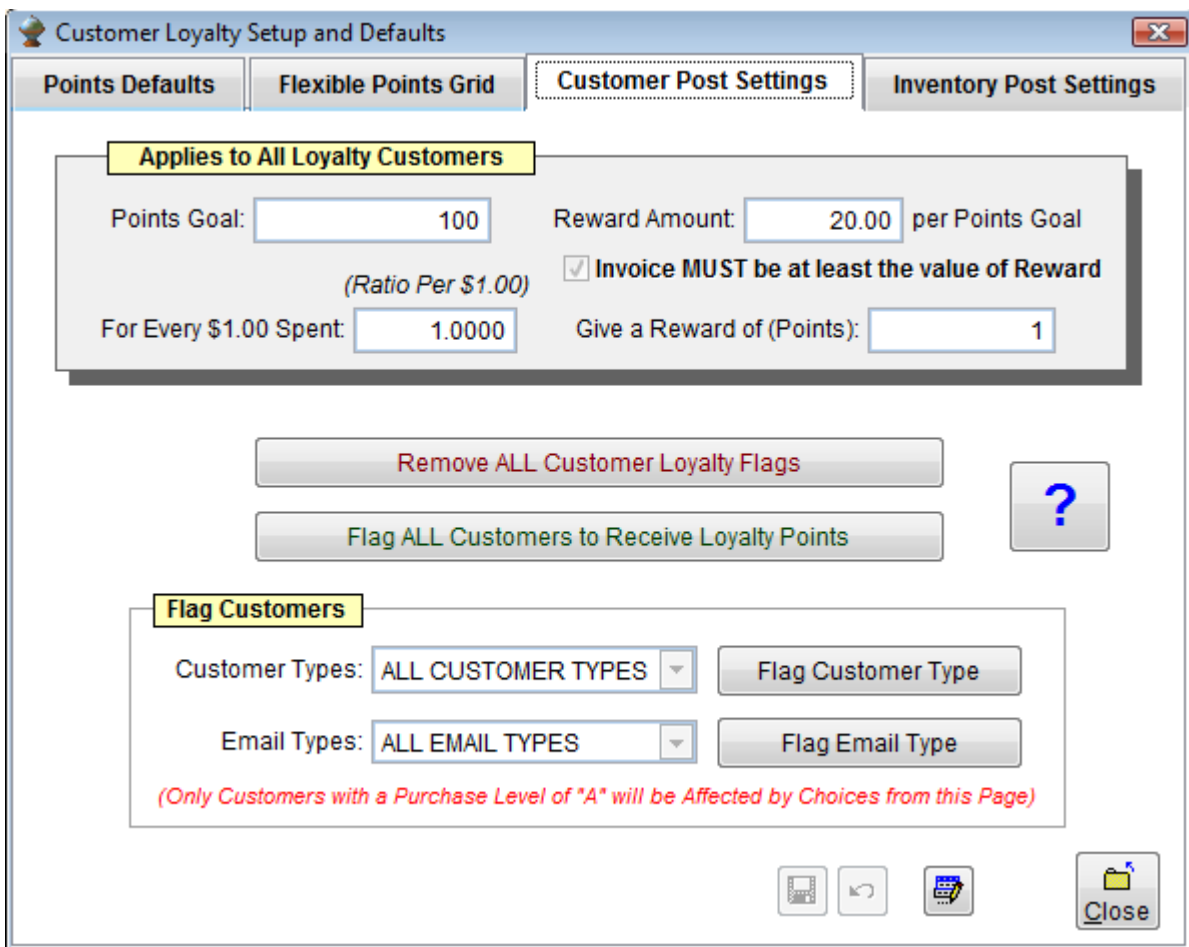
When doing a Push out to items with the Grid option, you can narrow your choices by the Departments, Categories and Vendors as shown above. If in ANYONE of the choices you choose ALL – the PUSH will Flag ALL items regardless what the other settings say.

The blue question mark button  will show the below screen to check your settings.



When first starting and while you're getting familiar with the Customer Loyalty, you may have to use the Clear buttons to reset all flags back to unchecked.

## Customer Loyalty Settings



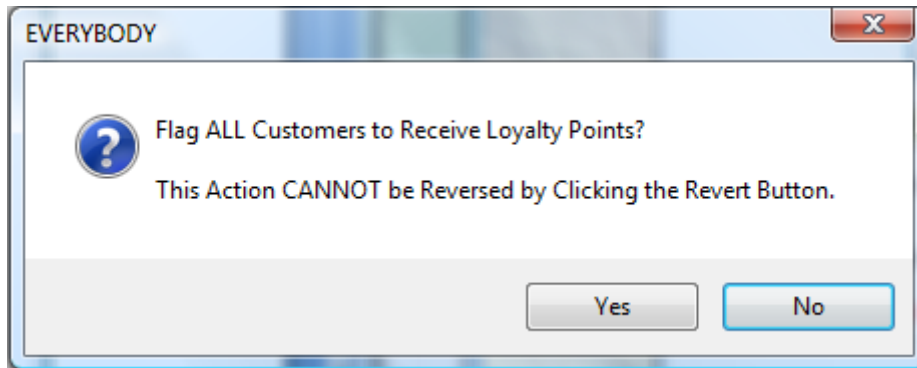
The screen above is the **Heart** of the Customer Loyalty system built into the Rocket POS.

**Points Goal:** this is the goal of accumulative total points a customer must reach BEFORE they can do another invoice and use their rewards. If you have the goal set to 100 and the customer has a points total of 90 but purchases enough items to put him over the 100 limit on a certain invoice, he CANNOT use the rewards on the same invoice. He must come in again and make another purchase. This is the WHOLE IDEA of the Customer Loyalty program.

**Reward Amount:** this is the amount to be deducted from the customer's invoice when they use their rewards points. If the customer has enough points to Double or Triple or More, their rewards, it will do so.

**Invoice MUST be at least the value of Reward:** make sure to check this option as it only makes sense for the customer to purchase as much as they want to use in rewards points.

**For every \$1.00 spent:** this is where you decide how many points to give a customer for every dollar spent. Decimals are supported but it is much easier to keep it at 1 point for each dollar. Setting it to 100 points per every \$100.00 is the same as 1 point for each dollar.

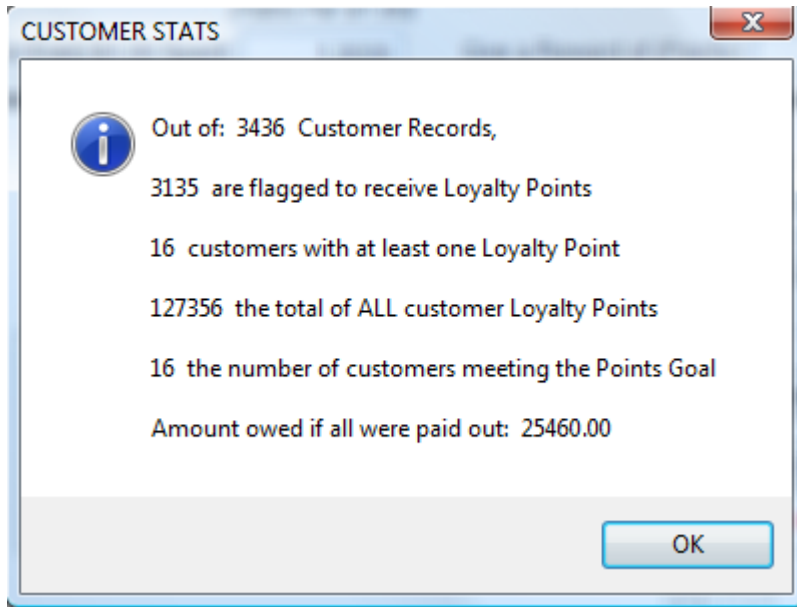


You can remove ALL flags from all customers. Again, the Pushed settings are cumulative when setting customers.

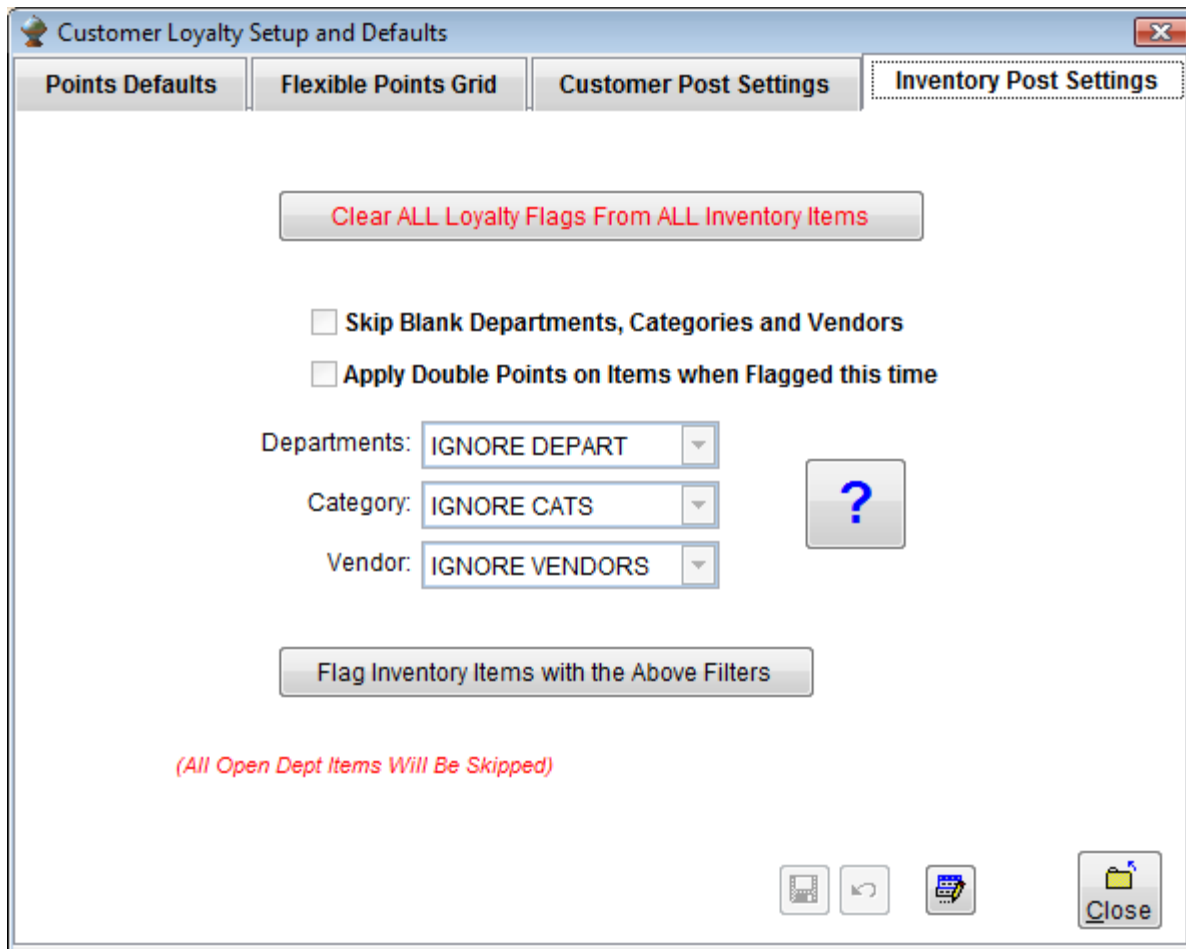
You can flag ALL customers or select just certain customer types and/ or Email types.

The setting whether to allow B and C level customers is honored by these Push buttons.

The Blue question mark button will show how many people are flagged. It will also show the amount of money owed if everyone decided to use their rewards points.



## Inventory Post Settings



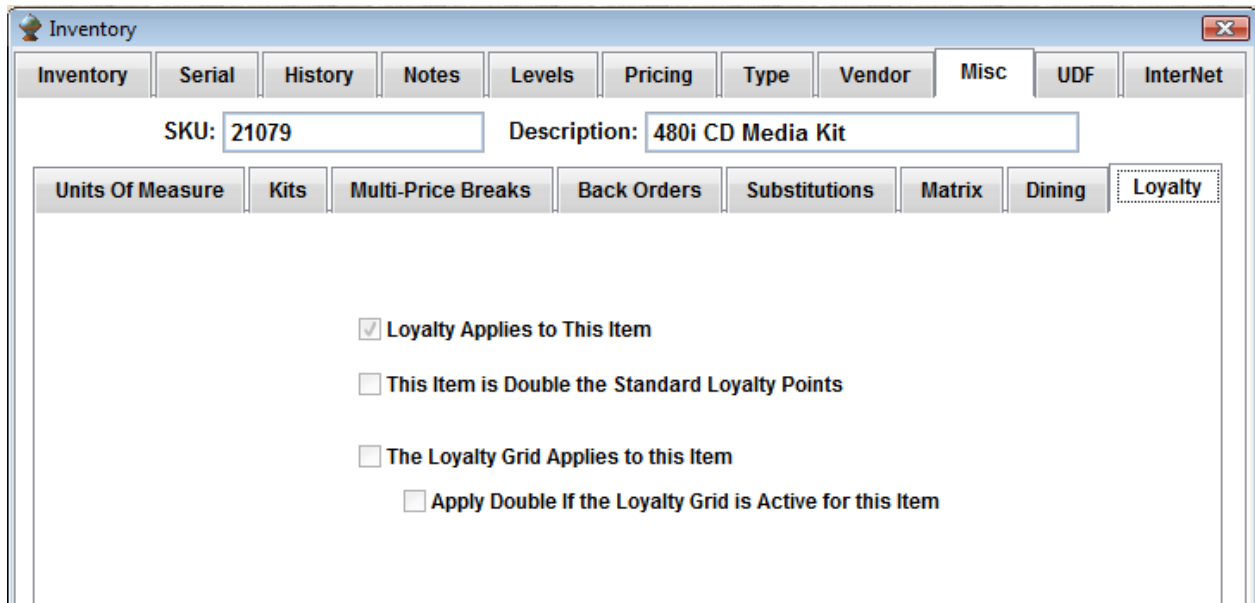


The above screen works similar to the Grid screen but is designed to flag certain items.

When doing a Push out to items with the option, you can narrow your choices by the Departments, Categories and Vendors as shown above. If in ANYONE of the choices you choose ALL – the PUSH will Flag ALL items regardless what the other settings say.

You can do a bulk setting of doubles as well as skip any blank Departments, Categories and Vendors.

The below screen shows where the Customer Loyalty settings are per each inventory item within the Inventory screen. These can manual be changed as needed.



The screenshot shows a software window titled "Inventory" with a close button in the top right corner. The window has a menu bar with the following items: Inventory, Serial, History, Notes, Levels, Pricing, Type, Vendor, Misc, UDF, and InterNet. Below the menu bar, there are two input fields: "SKU: 21079" and "Description: 480i CD Media Kit". Below these fields is a sub-menu bar with the following items: Units Of Measure, Kits, Multi-Price Breaks, Back Orders, Substitutions, Matrix, Dining, and Loyalty. The "Loyalty" tab is selected and highlighted with a dotted border. The main content area of the window contains four checkboxes with the following labels:

- Loyalty Applies to This Item
- This Item is Double the Standard Loyalty Points
- The Loyalty Grid Applies to this Item
  - Apply Double If the Loyalty Grid is Active for this Item

The below screen show where the Customer Loyalty shows up in the Customer screen. There is also a grid that shows all Cashed in points as well as the last invoice points were cashed in.

Customers

Customer Account: 34080394      Name: Johns Hardware Store

Receives Loyalty Points      Current Points Level: 905

**Loyalty Last Reward History**

Date Loyalty Last Used: 10/22/2008 07:59      Loyalty Money Last Received: 20.00

Last Points Cashed In: 100      Cashed In On Invoice#: 20227

Level	Used	Cashed-In	Value	Invoice#
1000	10/22/2008 07:59 AM	100	20.00	20227
815	10/21/2008 10:59 AM	200	25.00	20221
220	10/14/2008 09:50 AM	200	25.00	20217
610	10/14/2008 09:49 AM	400	50.00	20216
1000	10/14/2008 09:44 AM	400	50.00	20213
610	10/14/2008 09:35 AM	400	50.00	20212
1000	10/14/2008 09:29 AM	400	50.00	20211

Prev   Next   Add   Edit   Delete   Search   Wizard   Print   Close   Invoicing

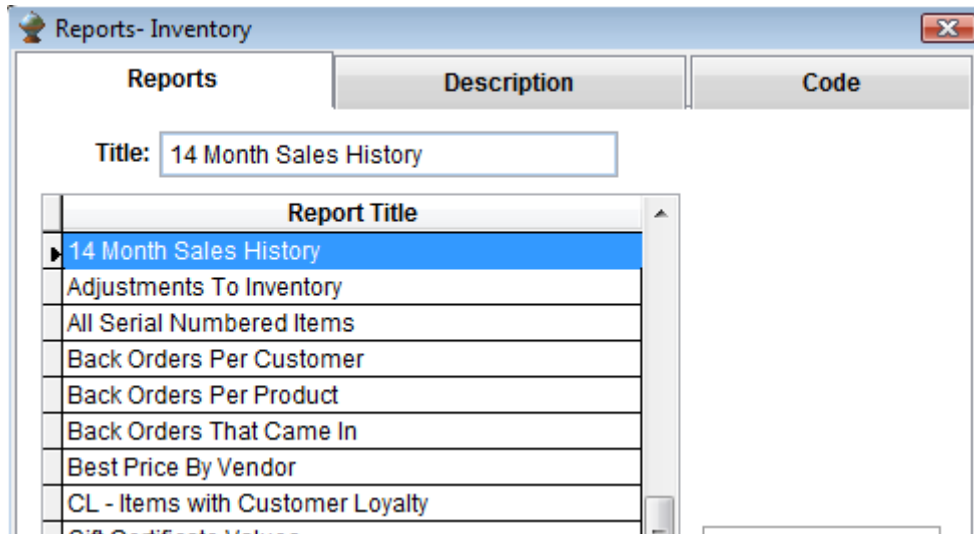
New reports help to keep track of all the settings found concerning the Customer Loyalty program. All Customer Loyalty reports start with the letters CL.

Reports- Customers

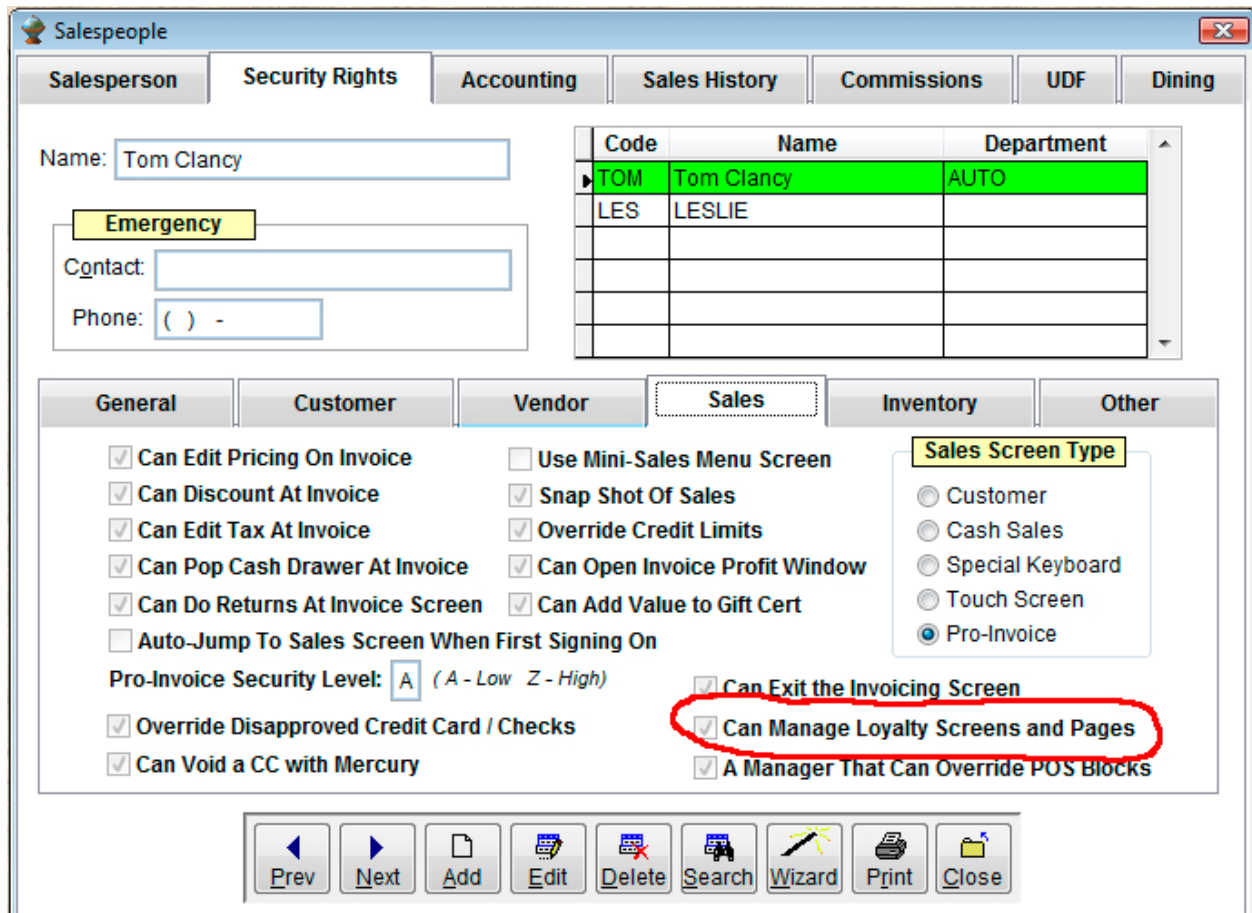
Reports      Description      Code

Title: Aging Report

Report Title
▶ Aging Report
Billing Statements
CL - Customers in Loyalty and Points
CL - Points Redeemed within a Date Range



A new security setting was added to the salesperson screen to handle the Customer Loyalty program.



To use a customer Scan Card, go into the Company setup. Add the three characters you want your customer cards to begin with. These characters you do NOT want to match the beginning of any SKU, Barcode or Description of inventory items.

Your Customer Cards should now have a barcode or magnetic stripe that begins with these same three characters and then a unique number or set of characters. When adding or signing up a new customer, scan the card as the customers ID# (it must be unique) and then fill in the rest of their information.

At the Pro-Invoice screen, at anytime during the sale you can scan the customer card and it will find the customer, adjust prices and calculate if they have enough points to cash in for this sale.

The screenshot shows the 'Company Setup - System Wide Defaults' window. The 'Miscellaneous (1)' tab is selected. The 'Customer Scan Card Leading Chars' field is highlighted with a red circle and contains the value 'ZZZ'. Other visible fields include 'Discount By' (Percentage), 'Selling Method' (LIFO), 'Trade Ins' (Margin To Make On Trade Ins: 40.0000, Tax Rate On Trade Ins: 0.00000), 'If Tender exceeds this amount plus the invoice amount, pop a warning window: 100', 'Tag-A-Long Name on Receipt Deposit', 'Clerks can be credited per Single Line Items on an Invoice', 'If Clerk Takes First (1) Break - Deduct Time', 'If Clerk Takes Second (2) Break - Deduct Time', 'Turn On Canadian Features', 'Print Purchase Orders', 'Turn On Euro € Features', 'Allow PO Receive Against Negative Qty On Hand', 'Currency Sign: \$', 'If Not Ordered From Prime Vendor - Do NOT Change Prime Vendor', 'Allow Inventory Items to be committed to Kits', 'Allow spaces to pad Invoice Search', and 'Checking Account# For Deposits'.

**A Special Note: An item called Loyalty Points will be added to your Inventory. It will have a SKU and Barcode called LOYALTY – this item MUST be present for the Customer Loyalty to work correctly. DO NOT delete or change the SKU for this Item.**

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