

**TECH-2I** Page | 1 of 5

Category	Technical
Course	POS Config.
Version	1.0
Client	Generic
Software	2.15.8.0

**Hints and Tips**

- ✓ If you're a Head-Office user and want to setup a loyalty program across multiple stores:
  - all accounts & point balances will be maintained in the HOS
  - contact SUREfire Support to enable global loyalty; this ensures POS has the most current data.
- ✓ You need to decide on the loyalty offering:
  - A loyalty customer must be identified during the POS transaction; will you issue barcoded cards, and/or set them up as an AR account? Refer to the [TECH-2d Configure Customer Cards Fact Sheet](#).
  - How will you manage customer sign-up?
  - How many points are earned per dollar spend? (*Usually one point per \$1; can set different points for each department*)
  - Do you exclude departments from earning loyalty points?
  - Do you want a points promotion day in certain departments (e.g. double points on a Tuesday)
  - If customers will use points as a tender, how many points will equal \$1?
  - If customers will receive vouchers:
    - how many points must be earned? (*Usually 1000-1500*)
    - What will be the \$ value?
    - Is it valid from the issue date or the next day?
    - How many days is it valid?
    - Do you exclude a voucher from being redeemed in certain departments?

## Configure a Loyalty Points Program

The SUREfire loyalty points program enables loyalty customers to earn points based on their dollar spend and either:

- issues a voucher through the POS receipt printer once the customer has reached the required point's; this can be used as tender during a subsequent transaction
- OR
- allows customers to use points as a tender for a transaction.

If loyalty accounts are learned in the BOS:

- a customer can nominate their points to go to a charity instead (using the **Bill To** field on their account)
- you can stop loyalty against a specific account.

Refer to the [BGEN-2b New Cash-Only or Loyalty Customer Account Fact Sheet](#).

### Procedure to Configure Loyalty Points Accumulation

1.	From the HOS/BOS <b>System</b> menu, select <b>Location Setup</b> .	
2.	If a Head Office user, select the Location that you want to define. <i>*You'll be defining the configuration for all stores at and below the level that you select.*</i>	
3.	Double-click the <b>Configure</b> icon. <i>*The POS System Configuration screen is displayed.*</i>	
4.	Click the <b>Account</b> -> <b>Loyalty</b> tab.	

**Hints and Tips**

- ✓ Loyalty configuration options:
  - **Allow Loyalty Accumulation:** must be selected to enable the loyalty program.
  - **Round Down Points Accumulation:** will round down the total points earned in a transaction (default is to round up once 50¢ or more).
  - **Show Loyalty Points on Receipt:** displays the total points balance at the end of the customers receipt.
  - **Show Loyalty Points on Screen:** displays the total points balance on the operator's POS screen.
  - **Loyalty Points on Non-Scanned items:** points can be earned on \$0.00 products that prompt for price at POS.
  - **Allow Points on Account transactions:** line-of credit customers will still earn points if they buy the transaction on their account.
  - **Loyalty point only if matches Cust Card Prefix:** must be selected if you set up prefixed cards on the **Customer Card** tab, so that these accounts can earn points.
  - **Allow Points Trading:** trade points for products; not used in this version.
  - **Receipt Text:** the text displayed on the customer receipt if **Show Loyalty Points on Receipt** is enabled.
  
- ✓ You find the **POS Department Codes** in the **BOS Tools** menu -> **Codes and Descriptions** -> **Department** tab.
  
- ✓ The **Points Promotion** section indicates the number of points earned per dollar spend for each department on nominated days of the week.
  - A multiplier of [2] is double points, or [3] is triple points.
  - If a department is listed twice for the same day, the best multiplier is applied.

<p>5. In the <b>Customer Account &amp; Loyalty</b> section, complete the following steps:</p> <ul style="list-style-type: none"> <li>• Select the applicable check boxes:  <i>*Standard Config. is to select all check boxes <b>except</b> for <b>Round Down Points Accumulation, Allow Points Trading, and Loyalty Points only if matches Cust Card prefix.</b>*</i></li> <li>• In the <b>Receipt Text</b> field, type the text that will be displayed on the customer receipt next to the points earned in this transaction.</li> <li>• Select the <b>Points per dollar</b> that will be earned on <b>prepacked items</b>.</li> <li>• Select the <b>Points per dollar</b> that will be earned on <b>non-scanned items</b>.</li> </ul> <p><i>*See Hints and Tips.*</i></p>										
<p>6. In the <b>Points Promotion</b> section, enter the required department multipliers.</p> <p><i>* Default is [1], which means no points promotion.*</i></p> <p><i>*Use the POS Dept Code.*</i></p> <p><i>*Refer to the <a href="#">TECH-2e Configure Department Points Multiplier Fact Sheet</a> for full instructions.*</i></p>										
<p>7. In the <b>Exclude Loyalty Departments</b> section, type the POS department <b>Code/s</b> that won't earn loyalty points.</p>										
<p>8. In the <b>Pro-Rata Loyalty Points</b> section, select whether points are based on the original price or the price resulting from:</p> <ul style="list-style-type: none"> <li>• an <b>Item Level</b> mark-down/manual discount</li> <li>• a <b>Transaction Level</b> manual percent-off discount – you apply the rule to <b>All Customers</b> (includes AR customers set up with a default discount, such as staff discount) or to <b>Non-AR Customers Only</b>.</li> </ul> <p><i>*You can select both item and transaction level.*</i></p>										
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;"><b>9. If customers will:</b></td> <td style="width: 30%;"><b>Then:</b></td> <td></td> </tr> <tr> <td>redeem points for vouchers</td> <td>complete the <b>Procedure to Configure a Loyalty Points for Voucher Program</b> on page 3.</td> <td></td> </tr> <tr> <td>redeem points for tender dollars</td> <td>complete the <b>Procedure to Configure a Loyalty Points for Tender Program</b> on page 5.</td> <td></td> </tr> </table> <p><i>*You can only run one type of loyalty store-wide.*</i></p>	<b>9. If customers will:</b>	<b>Then:</b>		redeem points for vouchers	complete the <b>Procedure to Configure a Loyalty Points for Voucher Program</b> on page 3.		redeem points for tender dollars	complete the <b>Procedure to Configure a Loyalty Points for Tender Program</b> on page 5.		
<b>9. If customers will:</b>	<b>Then:</b>									
redeem points for vouchers	complete the <b>Procedure to Configure a Loyalty Points for Voucher Program</b> on page 3.									
redeem points for tender dollars	complete the <b>Procedure to Configure a Loyalty Points for Tender Program</b> on page 5.									

**TECH-2I** Page| 3 of 5

**Procedure to Configure a Loyalty Points for Voucher Program**

**Hints and Tips**

- ✓ Format the **Voucher Header & Voucher Footer** text as you want it to print on the coupon, including section breaks [\*\*\*\*] and text you want to start on a new line (press **Enter**).
  - Loyalty won't work if the number of **header/footer rows to print bold** is greater than the number of rows you've included.
- ✓ **Sample voucher layout:**
- ✓ If you **exclude** vouchers from being redeemed in certain departments, all other departments will be set to included by default.

<p>1. In POS Config, click the <b>Account -&gt; Voucher -&gt; Voucher Details</b> tab.</p>							
<p>2. Select <b>Enable Voucher System</b> check box.</p>							
<p>3. In the <b>Award Point Level</b> field, type the number of points that will award a voucher.</p>							
<p>4. In the <b>Days Valid</b> field, type the number of days a voucher is valid for (starting from the date it can be redeemed). <i>*This calculates its expiry date.*</i></p>							
<p>5. Type the number of days after issue that a <b>Voucher can be redeemed</b>. <i>*Type [0] if it can be redeemed on the same day.*</i></p>							
<p>6. In the <b>Voucher Awards</b> section, complete the following steps:</p> <ul style="list-style-type: none"> <li>• In the <b>Qty</b> field, type the number of vouchers that will be awarded each time. <i>*Usually set to [1].*</i></li> <li>• In the <b>\$ Value</b> field, type the dollar value of a voucher.</li> </ul>							
<p>7. In the <b>Voucher Header</b> field, type the text that will print at the top of a voucher, and the number of <b>Header Rows</b> that'll be formatted double size bold.</p>							
<p>8. In the <b>Voucher Footer</b> field, type the text that will print at the bottom of a voucher, &amp; the number of <b>Footer Rows</b> that'll be bold.</p>							
<p>9. In the <b>Voucher Departments</b> section, select the required option:</p> <table border="1" data-bbox="598 1433 1165 1803"> <tr> <td><b>If a voucher:</b></td> <td><b>then:</b></td> </tr> <tr> <td>can only be redeemed in certain departments</td> <td>select <b>Include Departments</b>. In the <b>Code</b> field, type the POS department code/s included.</td> </tr> <tr> <td>can't be used to buy products in some departments (e.g. cigarettes)</td> <td>select <b>Exclude Departments</b>. In the <b>Code</b> field, type the POS department code/s excluded.</td> </tr> </table> <p><i>*You will only select one option.*</i></p>	<b>If a voucher:</b>	<b>then:</b>	can only be redeemed in certain departments	select <b>Include Departments</b> . In the <b>Code</b> field, type the POS department code/s included.	can't be used to buy products in some departments (e.g. cigarettes)	select <b>Exclude Departments</b> . In the <b>Code</b> field, type the POS department code/s excluded.	
<b>If a voucher:</b>	<b>then:</b>						
can only be redeemed in certain departments	select <b>Include Departments</b> . In the <b>Code</b> field, type the POS department code/s included.						
can't be used to buy products in some departments (e.g. cigarettes)	select <b>Exclude Departments</b> . In the <b>Code</b> field, type the POS department code/s excluded.						



**TECH-2I** Page | 4 of 5

**Hints and Tips**

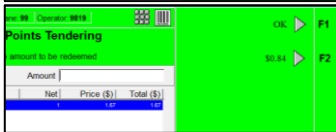
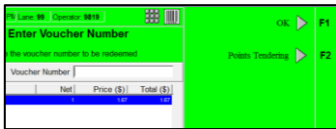
- ✓ If you **purge expired vouchers**, they won't be listed against the customers AR record anymore.
- ✓ **Loyalty Points Transfer** is not used in this version.
- ✓ The **coupon tender type** must be enabled so that a **Voucher** tender button displays at POS if an account is added.
- ✓ The configuration is applied to the registers when **File Transfer/POS Import** next runs & the operator logs off/on.
- ✓ If you have **multiple cards** with differing reward pricing, a customer that uses multiple cards (e.g. loyalty and senior) receives the best promotion and all eligible discounts.
  - The transaction and points is recorded against the **last learned** card scanned.
- ✓ You can stop a specific account from having loyalty. Refer to the [BGEN-2b New Cash-Only or Loyalty Customer Account Fact Sheet, step 10.](#)

<p>10. In the <b>Purge Vouchers</b> section, complete the following steps:</p> <ul style="list-style-type: none"> <li>• Type the number of days that you want the system to <b>Purge Expired Vouchers</b>.</li> <li>• If required, select the <b>Enable Redeemed Voucher Purging</b> check box and type the number of <b>Days After Redemption</b>.</li> </ul>	
<p>11. Click the <b>Tender -&gt; Tender Type</b> tabs.</p>	
<p>12. Select the <b>Tender Type</b> option <b>Coupon</b>.</p>	
<p>13. Select the <b>Enable Tender Type</b> check box.</p>	
<p>14. Click the <b>Tender -&gt; Tender Positions</b> tabs.</p>	
<p>15. Click <b>Voucher</b>, then [<b>&gt;</b>] to move it across into a spare <b>Tender Slot</b>.</p>	
<p>16. Click <b>Save</b>.</p>	
<p>17. Click <b>Yes</b> to confirm the changes. <i>*Or click <b>Cancel</b> to return to the settings.*</i></p>	
<p>18. Click <b>OK</b>.</p>	
<p>19. Click <b>Close</b> to exit the Location Setup.</p>	

## Procedure to Configure a Loyalty Points for Tender Program

### Hints and Tips

- When points tendering is enabled, there is a **Points Tendering** option within the **Voucher** tender option at POS.



- The customer can use all or some of their points balance to pay for the transaction.
  - The customer still earns points when they pay with points.
- After points tender has been used at POS, the AR account for the customer displays a voucher issued then immediately redeemed for the amount of points used.
- The configuration is applied to the registers when **File Transfer/POS Import** next runs and you restart POS.
- If you have **multiple cards** with differing reward pricing, a customer that uses multiple cards (e.g. loyalty and senior) receives the best promotion and all eligible discounts.
    - The transaction and points is recorded against the **last learned** card scanned.
- You can stop an account from having loyalty. Refer to the [BGEN-2b New Cash-Only or Loyalty Customer Account Fact Sheet, step 10.](#)

<p>1. In POS Config, click the <b>Account -&gt; Voucher -&gt; Voucher Details</b> tab. * You must still complete several fields on this tab, even though a voucher will not print.*</p>	
<p>2. Select <b>Enable Voucher System</b> check box.</p>	
<p>3. In the <b>Award Point Level</b> field, type [1].</p>	
<p>4. In the <b>Days Valid</b> field, type [1].</p>	
<p>5. In the <b>Voucher can be redeemed</b> field, type [0].</p>	
<p>6. In the <b>Voucher Departments</b> section, select the required ONE option:</p> <p><b>If points tender: then:</b></p> <p>can only be used for certain departments      select <b>Include Departments.</b> In the <b>Code</b> field, type the POS department code/s included.</p> <p>can't be used to buy products in some departments (e.g. cigarettes)      select <b>Exclude Departments.</b> In the <b>Code</b> field, type the POS department code/s excluded.</p>	
<p>7. Click the <b>Account -&gt; Voucher -&gt; Points Tendering</b> tab.</p>	
<p>8. In the <b>Points to amount ratio</b> field, type the number of points that equal \$1.</p>	
<p>9. Select the <b>Show Points to Dollars conversion</b> check box if you want points to display in their dollar value on-screen and on receipts.</p>	
<p>10. Click the <b>Tender -&gt; Tender Type</b> tab.</p>	
<p>11. Select the <b>Tender Type</b> option <b>Coupon</b>.</p>	
<p>12. Select the <b>Enable Tender Type</b> check box.</p>	
<p>13. Click <b>Save</b>.</p>	
<p>14. Click <b>Yes</b> to confirm the changes. *Or click <b>Cancel</b> to return to the settings.*</p>	
<p>15. Click <b>OK</b>.</p>	
<p>16. Click <b>Close</b> to exit the Location Setup.</p>	