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SURE*fire*

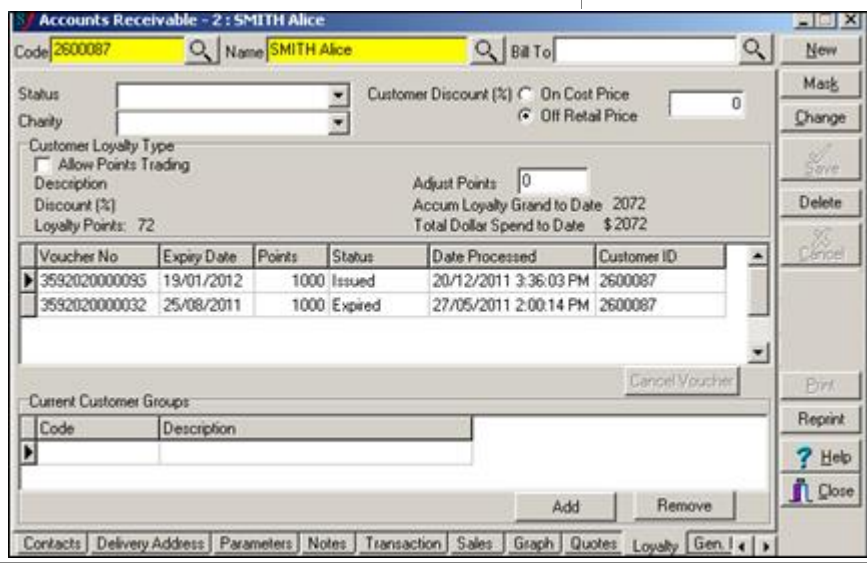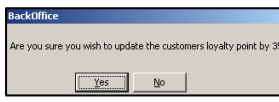|	
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Category	BOS General
Course	AR
Version	1.3
Client	Generic
Software	2.18.5

Maintain Loyalty Account Activity

You can maintain the loyalty points and vouchers awarded to a customer.

If your store is Head Office managed, check your business's policy on making changes at store level; they may be overridden once HOS Import runs overnight.
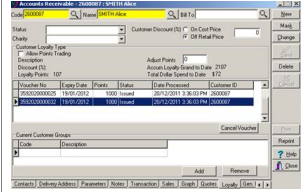
Hints and Tips

✓ Refer to the BGEN-2d Maintain a Customer Account Fact Sheet to:
  • edit the account parameters
  • update name/address details
  • delete an account
  • link a secondary account to the main account; e.g. for families and businesses who want individual cards.

✓ If this is a secondary account (**Bill to:** is populated), retrieve the primary account to maintain the loyalty activity.

✓ **If a customer loses their card and you won't replace it with the same number**, you have to delete the account, & manually adjust the points balance into a new account number.
  • Before you delete the old account, write down the points from the **Loyalty** tab; if you use the **Accum. Grand Total to Date** amount, vouchers will be re-printed if the points are greater than the award level.
  • The old account, and any vouchers that had been issued, won't be recognised at POS or in the BOS once the physical deletion utility runs at the store, and Price Update applies the deletion at POS.

✓ **If you use a COD account for deliveries**, manually deduct and add the points back to the loyalty account holder if applicable.

✓ **Loyalty Points Balances:**
  • **Accum Loyalty Grand to Date** is the points earned since the account was created, adjusted for any points manually added/subtracted.
  • **Loyalty Points** is the points earned toward the next voucher; this resets to zero once a voucher has been issued.

Procedure to Maintain Loyalty Account Activity

1.	From the HOS/BOS **Receivables** menu, select **Accounts**. *Or click the **Accounts Receivable** icon.*	
2.	In the **Code** field, type, or click 🔍, to search for the account number. *The account details are displayed.*	
3.	Click the Loyalty **tab**.	

4.	**To:**	**then:**	
	check the points balance of a customer	refer to the **Loyalty Points** field. *See Hints and Tips.*	
	manually adjust the points balance of an account	in the **Adjust Points** field, type the number of points you want to update the account by. *Use a [-] to reduce points.* Click **Save**. Click **Yes** to confirm. *The **Accum Loyalty Grand to Date** and **Loyalty Points** fields are updated.*	

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Hints and Tips

✓ **If a customer loses their voucher,** there's no reprint option so you can't re-issue that voucher. Either:

- write down the 'issued' voucher number listed on the **Loyalty** tab, and manually type it when POS prompts for the voucher number, OR
- cancel the voucher, and adjust the points so that another voucher will be triggered in the next sale.

✓ Contact SUREfire Retail Support if the **Cancel Voucher** option is disabled in your system, and you want to use this option.

✓ **Frequent Shopper Points Audit report:**

- If your loyalty program offers points as tender, the number of vouchers awarded and redeemed will be the same, because POS treats the points tender as though a voucher has been awarded and redeemed in the same transaction.
- If you don't run a points program, the report still has value to check how often accounts are added to sales.

✓ To report on **credit type accounts and activity,** refer to the BGEN-2d Maintain a Customer Account Fact Sheet.

✓ If you're a Head Officer user, loyalty maintenance is transmitted to all the store/s when HOS Export and HOS Import are next run.

✓ The account changes are sent down to the registers when **File Transfer/POS Import** next runs (usually every few minutes).

5.

To:	then:
fix a customer who has a negative points value	in the **Adjust Points** field, type the number of points to set the balance to zero. *Use a [-]; e.g. type [-][1][5] to fix negative 15 points.* Click **Save**. Click **Yes** to confirm. *The accumulated and current points are updated.*
cancel an issued voucher *e.g. if the customer loses the voucher*	select the voucher (row). Click **Cancel Voucher**. Click **Yes** to confirm. In the **Adjust Points** field, type the points that were deducted when the voucher was issued (*only if you want to trigger another voucher*). Click **Save**.

6.

To report on:	then:
all account customers	select the **Receivables** menu -> **Listing** report.
points awarded, and voucher activity between two dates	select the **Reports** menu -> **Loyalty** -> **Loyalty-Frequent Shopper Points Audit** report.
all accounts and their loyalty points balance from a selected date	select the **Reports** menu -> **Loyalty** -> **Loyalty Customer**s **Without Purchases** report. *Set the date to Null to return all accounts.*
accounts with purchase activity this month or the year-to-date	select the **Receivables** menu -> **Sales Analysis**. *Select **Show Detail** to view itemised transactions.*
accounts ranked by their total spend between two dates	select the **Reports** menu -> **Loyalty** -> **Customer Purchase Analysis** report. *You can select a specific department or product.*
accounts who haven't purchased between two dates	select the **Reports** menu -> **Loyalty** -> **Customer Non-Purchase Analysis** report. *You can select a specific department.*

7.

To:	then:
edit another account	return to step 2.
finish	click Close.