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SUREfire SYSTEM

TECH-2p *Page| 1 of 5*	
Category	Technical
Course	POS Config.
Version	1.1
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 SURE*fire* 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 **System** menu, select **Location Setup**.	
2.	If a Head Office user, select the Location that you want to define. *You'll be defining the configuration for all stores at and below the level that you select.*	
3.	Double-click the **Configure** icon. *The POS System Configuration screen is displayed.*	
4.	Click the **Account** -> **Loyalty** tab.	

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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.
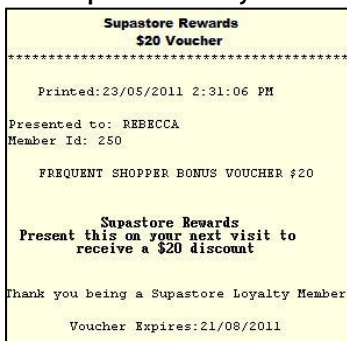
5.	In the **Customer Account & Loyalty** section, complete the following steps: • Select the applicable check boxes: ***Standard Config. is to select all check boxes _except_ for *Round Down Points Accumulation, Allow Points Trading,* and *Loyalty Points only if matches Cust Card prefix.** • In the **Receipt Text** field, type the text that will be displayed on the customer receipt next to the points earned in this transaction. • Select the **Points per dollar** that will be earned on **prepacked items**. • Select the **Points per dollar** that will be earned on **non-scanned items**. *See Hints and Tips.*

Surefire POS System Configuration
Customer Account & Loyalty
☑ Allow Loyalty Accumulation
☐ Round Down Points Accumulation
☑ Show Loyalty Points on Receipt
☑ Show Loyalty Points on Screen
☑ Loyalty Points on Non-Scanned items
☑ Allow Points on account transactions
☐ Loyalty point only if matches Cust Card prefix
☐ Allow Points Trading
☐ All Account can use points trading
Receipt Text: Points Earned
Points per dollar (prepacked item): 1
Points per dollar (non-scanned item): 1
Points Promotion
Day Of Week: Friday | Dept Code: 0 | Multiplier: 1
Dept Code 0 = All Departments
☐ Apply Points Multiplier to Loyalty Promotion

6.	In the **Points Promotion** section, enter the required department multipliers. * Default is [1], which means no points promotion.* *Use the POS **Dept Code**.* *Refer to the TECH-2e Configure Department Points Multiplier Fact Sheet for full instructions.*
7.	In the **Exclude Loyalty Departments** section, type the POS department **Code/s** that won't earn loyalty points.
8.	In the **Pro-Rata Loyalty Points** section, select whether points are based on the original price or the price resulting from: • an **Item Level** mark-down/manual discount • a **Transaction Level** manual percent-off discount – you apply the rule to **All Customers** (*includes AR customers set up with a default discount, such as staff discount*) or to **Non-AR Customers Only.** *You can select both item and transaction level.*

Exclude Loyalty Departments
Code: 008 | Department:
Pro-Rata Loyalty Points
☐ Item Level
☑ Transaction Level
  ⦿ All Customers
  ○ Non-AR Customers Only

9.	**If customers will:**	**Then:**
	redeem points for vouchers	complete the **Procedure to Configure a Loyalty Points for Voucher Program** on page 3.
	redeem points for tender dollars	complete the **Procedure to Configure a Loyalty Points for Tender Program** on page 5.

You can only run one type of loyalty store-wide.

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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:**

```
        Supastore Rewards
          $20 Voucher
*****************************************

       Printed:23/05/2011 2:31:06 PM

Presented to: REBECCA
Member Id: 250

    FREQUENT SHOPPER BONUS VOUCHER $20


       Supastore Rewards
   Present this on your next visit to
         receive a $20 discount

Thank you being a Supastore Loyalty Member

      Voucher Expires:21/08/2011
```

✓ If you **exclude** vouchers from being redeemed in certain departments, all other departments will be set to included by default.

1.	In POS Config, click the **Account -> Voucher -> Voucher Details** tab.	
2.	Select **Enable Voucher System** check box.	
3.	In the **Award Point Level** field, type the number of points that will award a voucher.	
4.	In the **Days Valid** field, type the number of days a voucher is valid for (starting from the date it can be redeemed). *This calculates its expiry date.*	
5.	Type the number of days after issue that a **Voucher can be redeemed**. *Type [0] if it can be redeemed on the same day.*	
6.	In the **Voucher Awards** section, complete the following steps: • In the **Qty** field, type the number of vouchers that will be awarded each time. *Usually set to [1].* • In the **$ Value** field, type the dollar value of a voucher.	
7.	In the **Voucher Header** field, type the text that will print at the top of a voucher, and the number of **Header Rows** that'll be formatted double size bold.	
8.	In the **Voucher Footer** field, type the text that will print at the bottom of a voucher, & the number of **Footer Rows** that'll be bold.	
9.	In the **Voucher Departments** section, select the required option:	

If a voucher:	then:
can only be redeemed in certain departments	select **Include Departments**. In the **Code** field, type the POS department code/s included.
can't be used to buy products in some departments (e.g. cigarettes)	select **Exclude Departments**. In the **Code** field, type the POS department code/s excluded.

You will only select one option.

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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.

10.	In the **Purge Vouchers** section, complete the following steps: • Type the number of days that you want the system to **Purge Expired Vouchers**. • If required, select the **Enable Redeemed Voucher Purging** check box and type the number of **Days After Redemptio**n.	
11.	Click the **Tender** -> **Tender Type** tabs.	
12.	Select the **Tender Type** option **Coupon.**	
13.	Select the **Enable Tender Type** check box.	
14.	Click the **Tender** -> **Tender Positions** tabs.	
15.	Click **Voucher**, then [>] to move it across into a spare **Tender Slot.**	
16.	Click **Save.**	
17.	Click **Yes** to confirm the changes. *Or click Cancel to return to the settings.*	
18.	Click **OK.**	
19.	Click **Close** to exit the Location Setup.	
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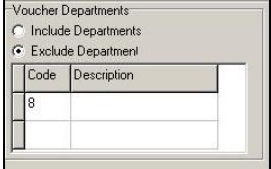Need help? Tel: 1300 724 667   Email: support@surefire.com.au
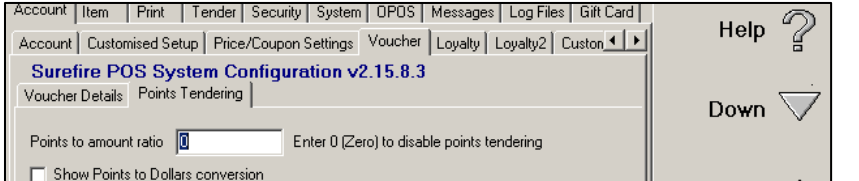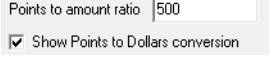
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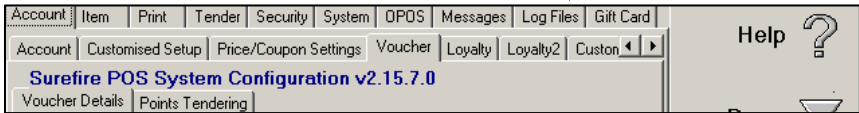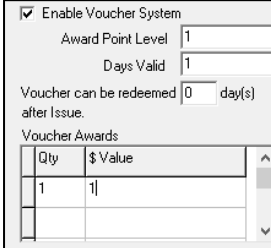
Procedure to Configure a Loyalty Points for Tender Program

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.

✓ Points Tendering reports under 'Coupon' sale type on the Accountability reports.

1.	In POS Config, click the **Account** -> **Voucher** -> **Voucher Details** tab. ** You must still complete several fields on this tab, even though a voucher will not print.**	
2.	Select **Enable Voucher System** check box.	
3.	In the **Award Point Level** field, type [1].	
4.	In the **Days Valid** field, type [1].	
5.	In the **Voucher can be redeemed** field, type [0].	
6.	In the **Voucher Awards** section, complete the following steps: • In the **Qty** field, type [1]. • In the **$ Value** field, type [1[as the dollar value of a voucher.	
7.	In the **Voucher Departments** section, select the required ONE option:	

If points tender:	then:
can only be used for certain departments	select **Include Departments**. In the **Code** field, type the POS department code/s included.
can't be used to buy products in some departments (e.g. cigarettes)	select **Exclude Departments**. In the **Code** field, type the POS department code/s excluded.

8.	Click the **Account** -> **Voucher** -> **Points Tendering** tab.	
9.	In the **Points to amount ratio** field, type the number of [cents] 1000 points converts into. **i.e. 1000 points = 500 cents ($5).** **Or 1000 points = 1000 cents ($10) (so a customer with 500 points can redeem $5 points tender).**	
10.	Select the **Show Points to Dollars conversion** check box for points to display in their dollar value on-screen and on receipts.	
11.	Click the **Tender** -> **Tender Type** tab.	
12.	Select the **Tender Type** option **Coupon**.	
13.	Select the **Enable Tender Type** check box.	

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Hints and Tips

✓ The configuration is applied to the registers when **File Transfer/POS Import** next runs and you restart POS.

14.	Click the **Tender** -> **Tender Positions** tab.	
15.	Move the **Voucher** tender button into a **Tender Slot.**	
16.	Click **Save**.	
17.	Click **Yes** to confirm the changes. *Or click **Cancel** to return to the settings.*	
18.	Click **OK**.	
19.	Click **Close** to exit the Location Setup.	
		❑