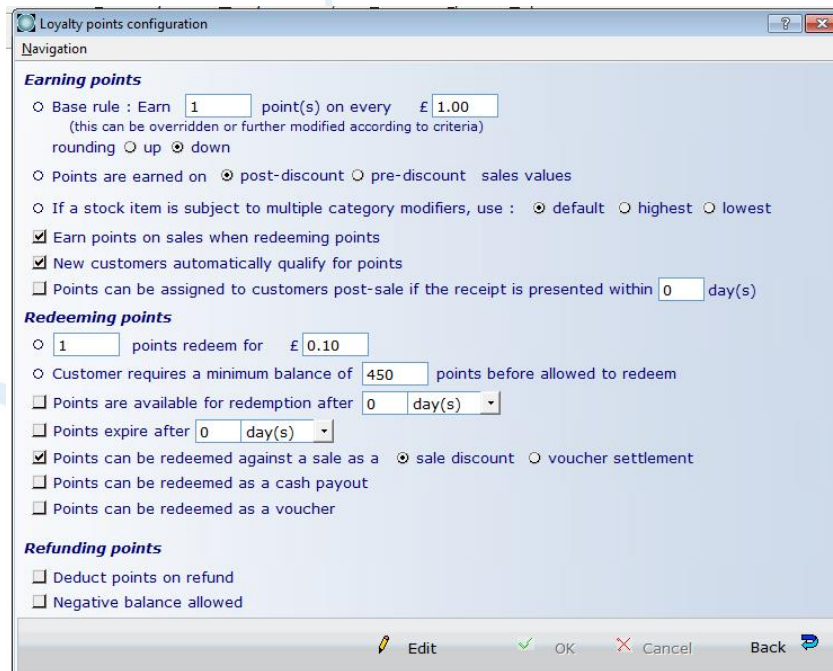# Loyalty Points

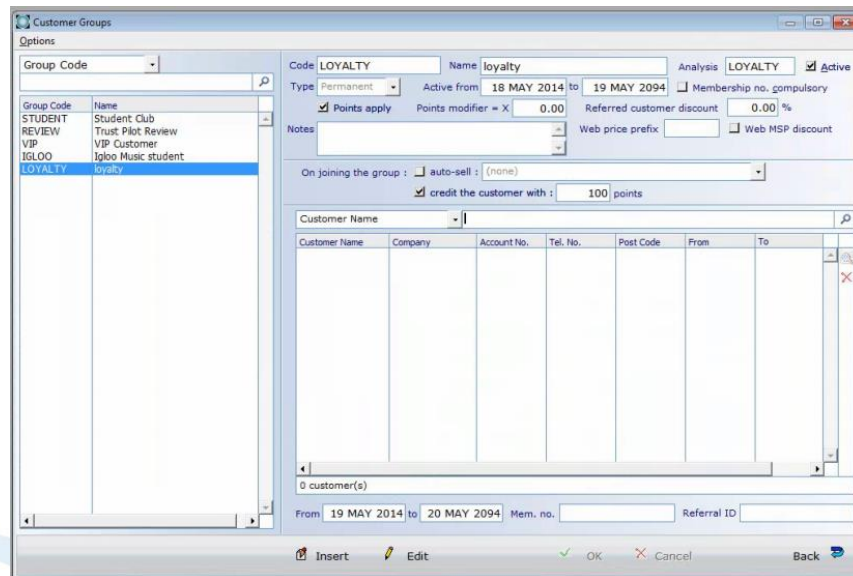## Part 1- Setting up the loyalty points – Earning and Redeeming

In the back office, go to System Control > Transaction Configuration > Loyalty Points and the following window will be brought up:
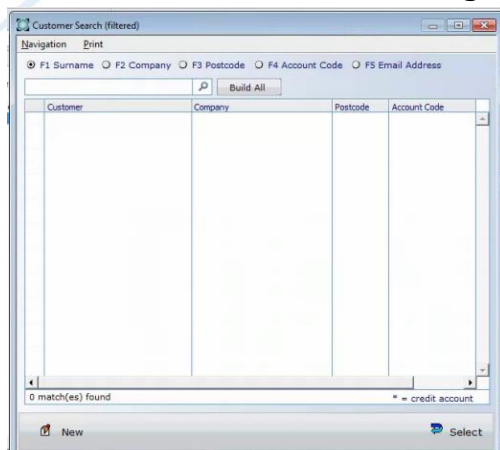

- Set up the base rule to see how many points can be earned on every £1.00 spent in the shop.
- Configure whether points can be earned on post-discount or pre-discount sales.
- Check the box if you would like to enable customers to earn points on sales when they redeem points, if new customers can automatically qualify for points and if points can be assigned to customers post-sale with a receipt.
- Assign how many points can be redeemed for £0.01 or £0.10 and whether the customer needs to have a minimum points balance prior to redeeming any points.
- Determine if points can have an expiry date or whether they can be redeemed against a sale as a discount or a voucher settlement.
- It can be configured for points to be redeemed as cash or vouchers. Additionally, it can be set up so that when there are refunds, points are then deducted upon the refund.

Part 2- Setting up the Customer group for loyalty

- To restrict customers and to determine exactly which customers can be part of the loyalty scheme, a customer group can be created by going to Sales Management > Customer Groups.
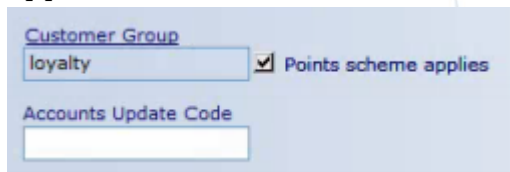

- Go to 'Insert' and create a customer group called 'Loyalty' and select it as a permanent type, leave the dates as they are.
- Tick the box next to 'membership number compulsory' if you require a membership number to be entered for each customer when they are added to the group.
- Tick the box next to 'Points apply' and decide if you would like to add an item to auto sell when joining the group, or the customer can be credited with some points upon joining the group.
- When you are happy, press 'OK'. The details can be edited at any time by going to 'Edit'. To add customers press 'Edit' and select the magnifying glass just above the red cross and that will bring the following box up:

Search by surname or company and press 'select' at the bottom of the page. Then, when they are in the list, they will show in the second half of the page.

Part 3- Customer record window

Going to Sales Management > Customers, then search for the customer and the customer group should show. Go to edit and check the box next to 'Points scheme applied';
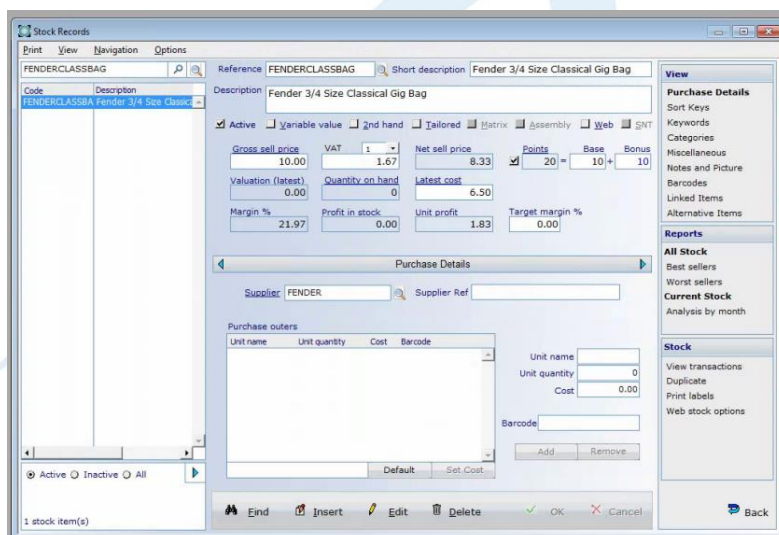

It is possible to print a points statement from here by going to 'Print points statement'.

Part 4- Applying bonus points to stock records

It is possible to apply bonus points directly to stock records by going into the stock record in Product File > Stock record > Edit, put the cursor in the box next to 'Bonus' and over typing the amount:

Then select 'OK'.