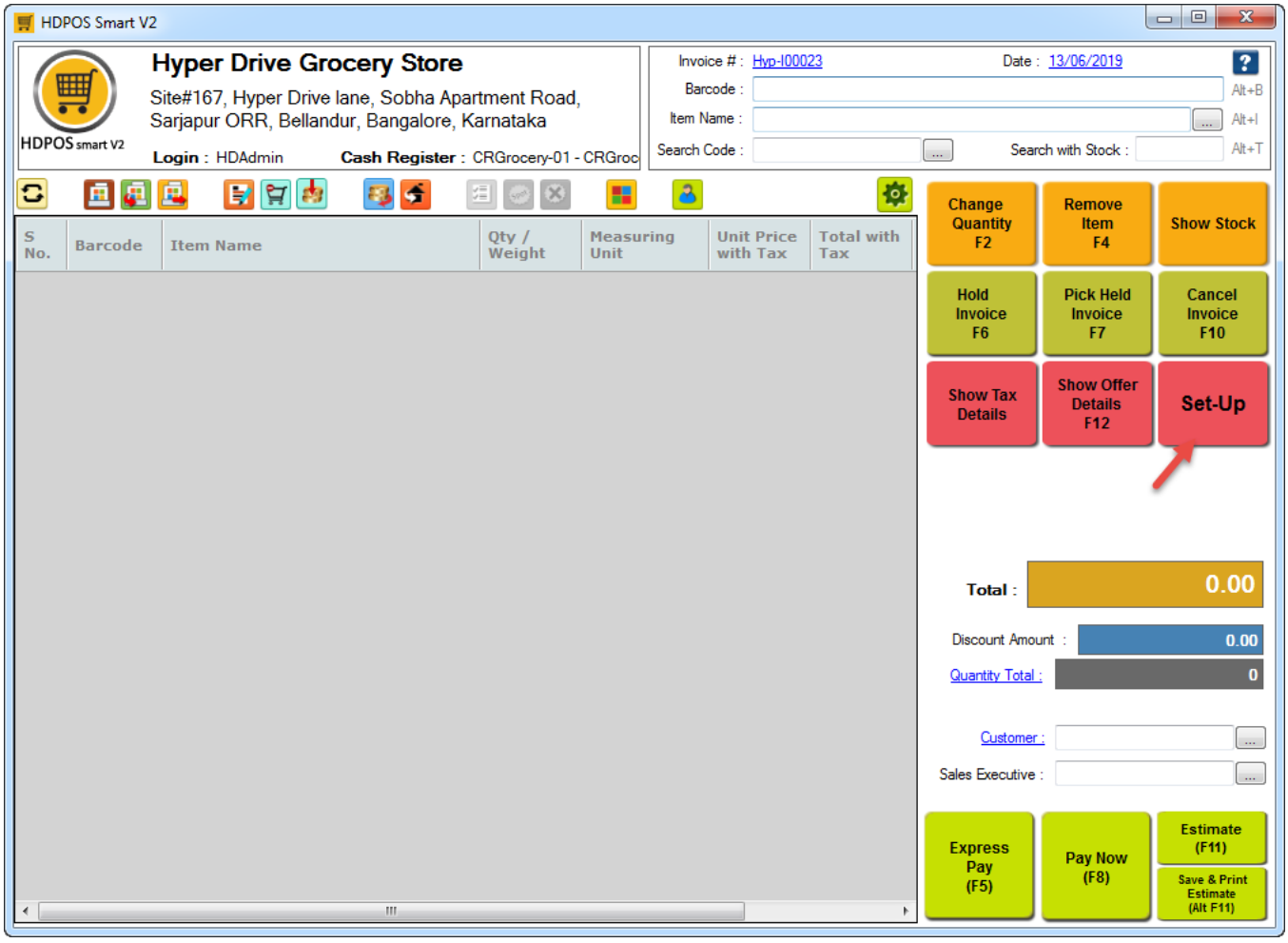
How to add Loyalty Points Settings in HDPOS smart?

In HDPOS smart you can easily add Loyalty points settings. Below are the steps which you need to follow add Loyalty settings.

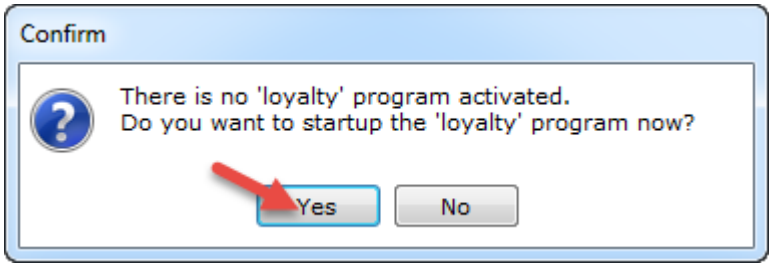
1. Run **HDPOS smart** & click on **Set-Up** button on the main screen.



2. From 3rd page of **Set-Up** select **Loyalty Points**.



3. If you are doing loyalty points settings for the first time, you will see the below message box. Click on **Yes**.



4. You will see the loyalty redemption settings screen as shown below. You can change the following values :

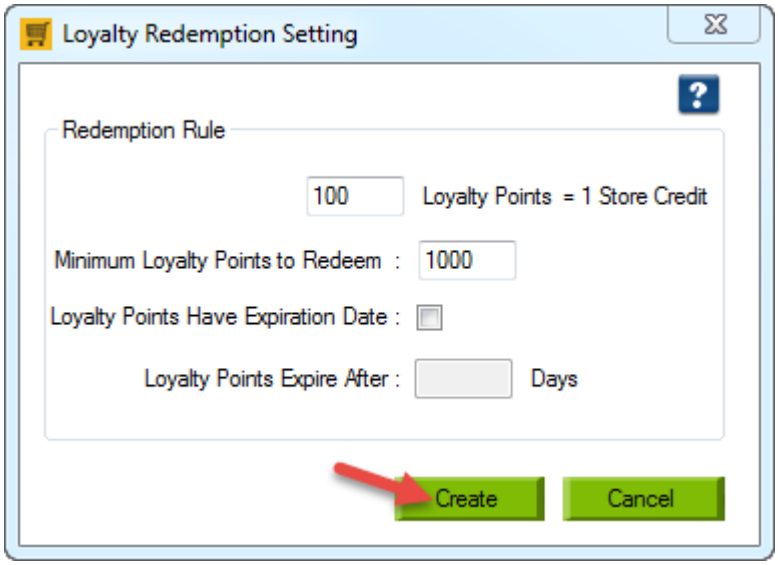
a. **Loyalty Points are equal to 1 Store Credit**: Enter a number for loyalty points which you want to give as equal to 1 Store Credit. By default the value is 100.

b. **Minimum Loyalty Points to Redeem**: Enter the minimum number of loyalty points you want to keep for redemption of Loyalty Points. By default the value is 1000.

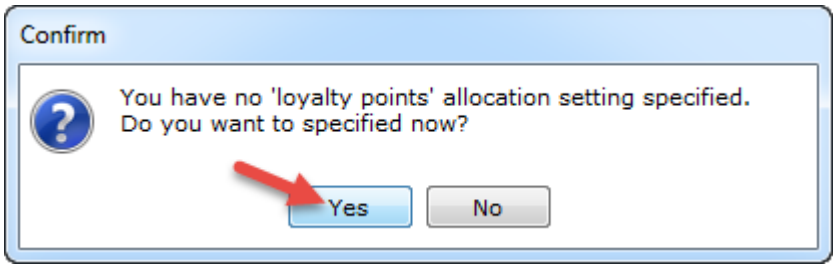
c. **Loyalty Points Have Expiration Date** checkbox: If you want to give expiry date for loyalty points, check this checkbox.

d. **Loyalty Points Expire After**: Enter the number of days after which loyalty points will expire. This field will be enabled only when you check the checkbox of Expiry Date.

e. Click on **Create** button.



5. You will see the following message. Click on **Yes**.



6. This will bring the below screen of **Add New Loyalty Settings**.

a. **Loyalty Setting Name**: Enter any Name for **Loyalty Setting**.

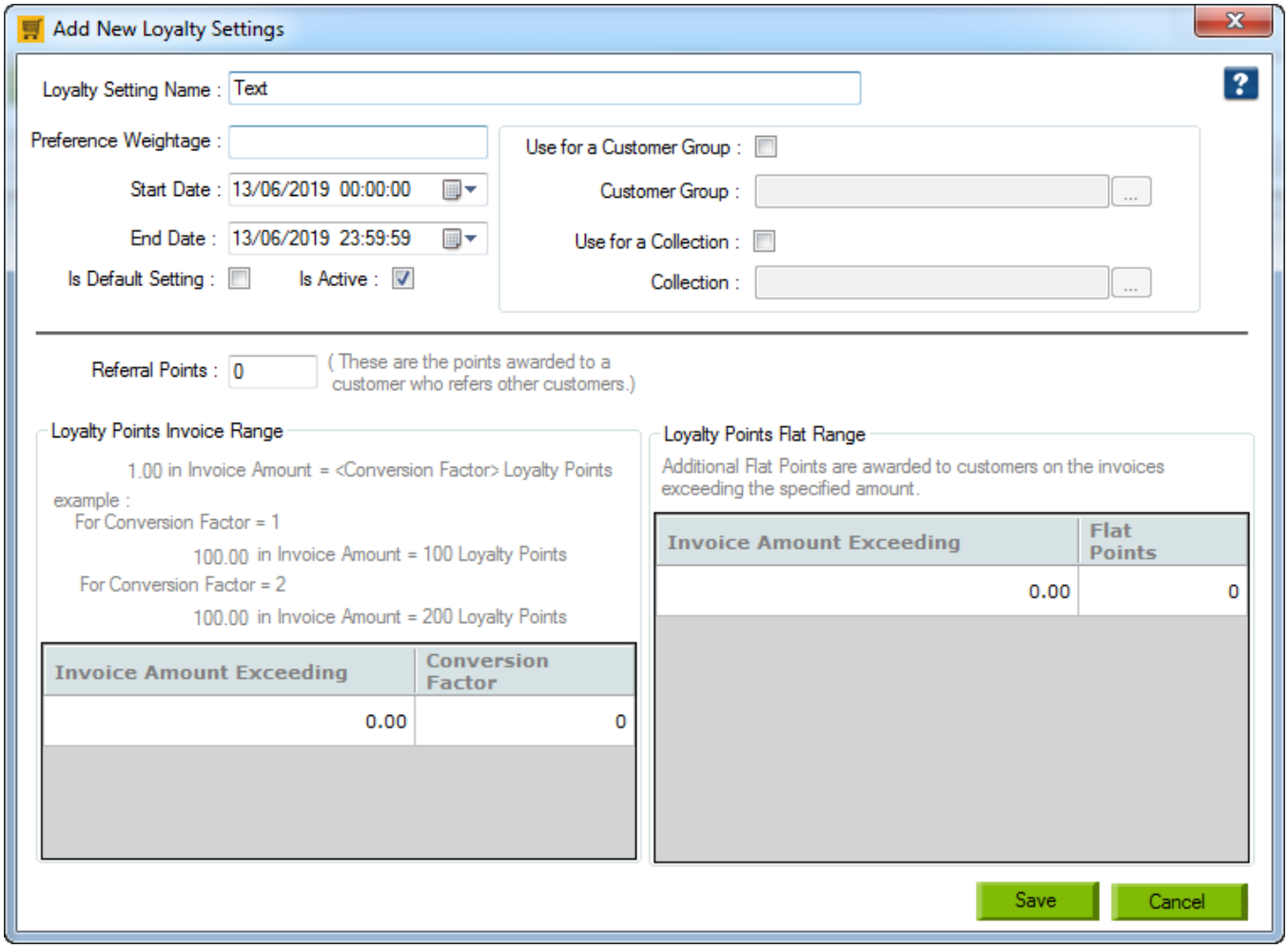
b. **Is Default**: If a Loyalty setting is set as **Is Default** then this loyalty setting will be applicable to any invoice made for customers who are enrolled for loyalty points, provided there is no other active loyalty setting running at that given point of time.

c. **Is Active**: This option will be checked by default. Unchecking this will make the selected loyalty setting inactive.

d. **Start Date**: This is the date from which the loyalty setting will be applicable. You can also mention the time for the Loyalty period to get to know the proper expiry period for the defined Loyalty.

e. **End Date**: This is the date till which the loyalty setting will be applicable. Once the Loyalty End Period is reached the Loyalty settings will no longer be applicable.

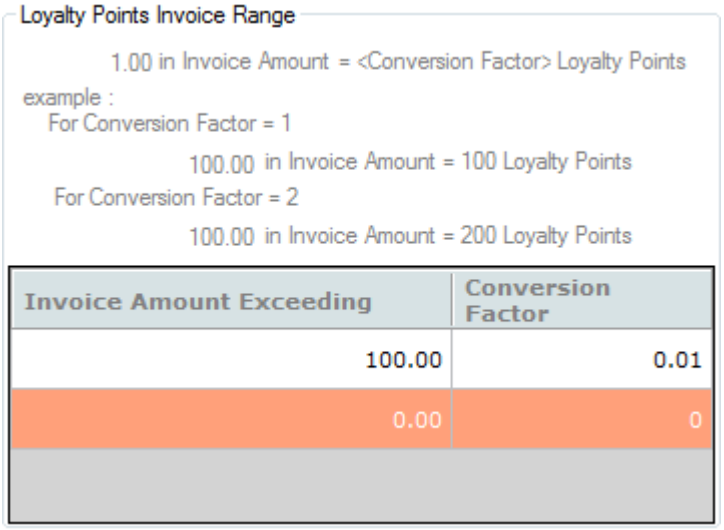
f. **Referral Points**: These are the points that will be applied to the customer who has referred the new customer to enroll for the loyalty program.



g. **Loyalty Points Invoice Range**: In this section define how the loyalty points should apply to the customer.

- **Invoice Amount Exceeding**: Enter the invoice amount after which the loyalty points are applied.
- **Conversion Factor**: Enter the conversion factor which is used to calculate the number of loyalty points that will be given to customer depending on the invoice amount. **1.00 in Invoice amount= Conversion Factor * Loyalty Points**.
- For E.g.: I want to give 1 loyalty point per invoice amount of 100, then conversion factor is calculated as 1/100=0.01.

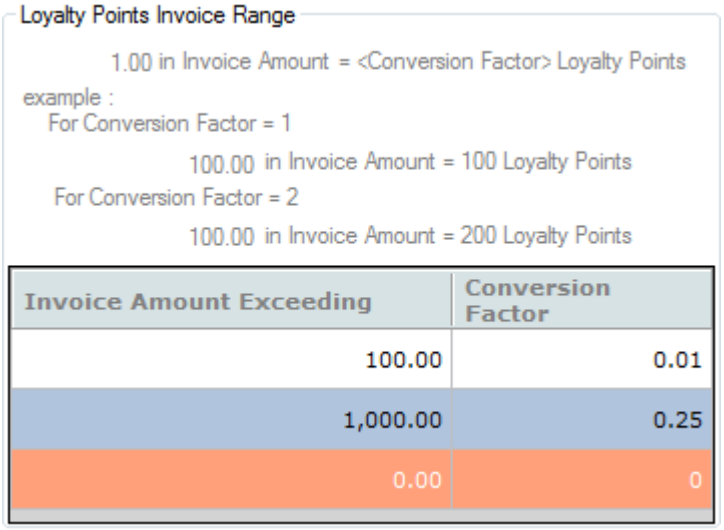
This would mean if the customers invoice amount exceeds 100 he will receive loyalty points.



- For E.g.: If you want to give different loyalty points for invoice range, you can define as shown below. Here I gave conversion factor as 0.01 for 100 invoice amount and 0.25 for invoice amount 1000.

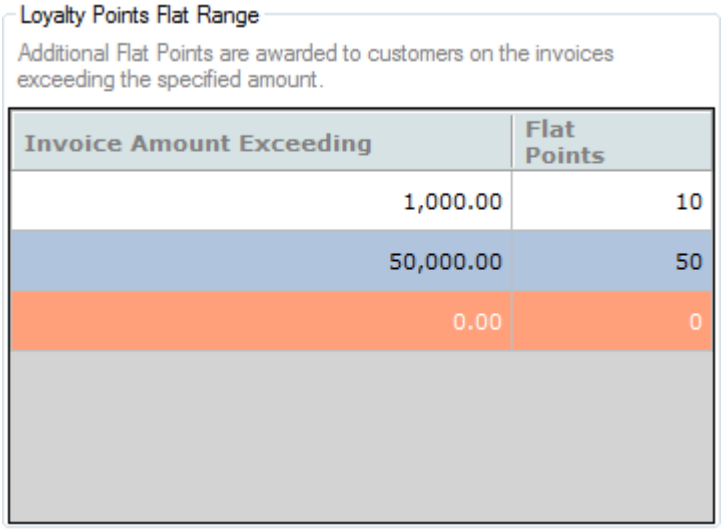
i. If the invoice amount is anything above 100 and less than 1000, then the customer will get loyalty points based on the 1st conversion factor mentioned in the above example i.e. 0.01.

ii. If the invoice amount is above 1000, then the customer will get loyalty points based on the 2nd conversion factor mentioned in the above example i.e. 0.25.



h. **Loyalty Point Flat Range**: This is the additional points the customer will get if the invoice amount exceeds a given value. The points mentioned here will be added to the points received as per the definition in **Loyalty Points Invoice Range**.

For E.g.: I have defined loyalty point flat range as below. It means that if the invoice amount exceeds 1000 the customer would get flat 10 loyalty points in addition to invoice range loyalty points.



E.g. If the invoice amount is 1000 then the invoice would get flat loyalty points (10) + invoice range loyalty points (1000 * 0.01 i.e 10) with is a total of 1010 loyalty points.

7. Click on **Save** button.