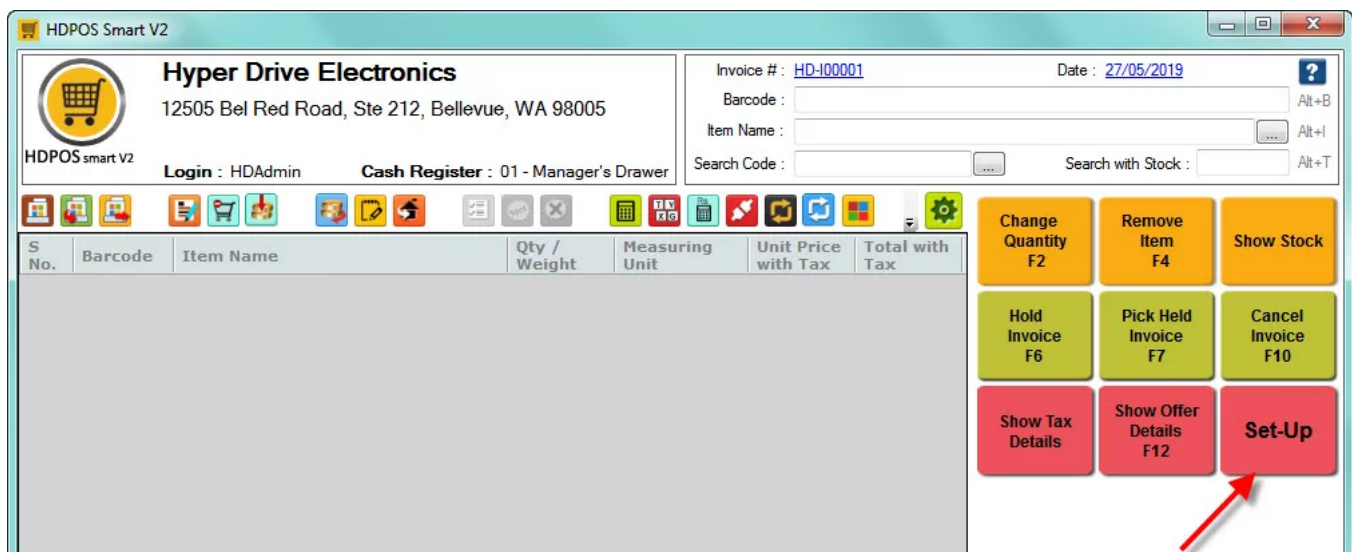


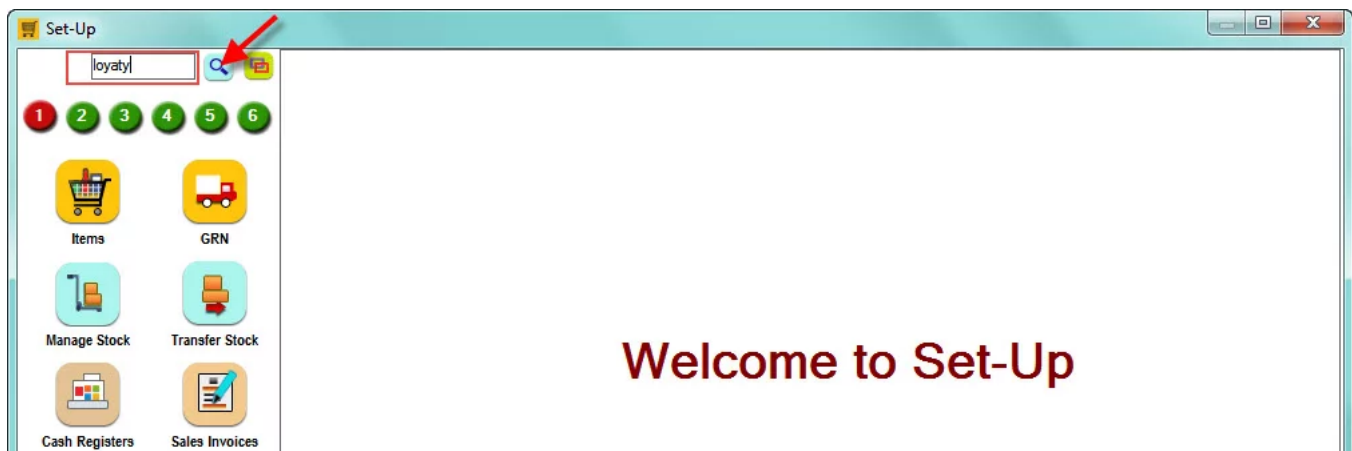
Define loyalty program on item collection

Follow the steps below to define loyalty program on item collection

1. Run HDPOS smart & click on Set-Up button



2. Type Loyalty in search field and click on search icon



3. From the search result, select Loyalty Points.



Skip step 4, 5 and 6 if you already activated loyalty program.

4. If you are defining loyalty points settings for the first time, you will see the below message box. Click on Yes to continue.



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

Loyalty Redemption Setting

Redemption Rule

100 Loyalty Points = 1 Store Credit

Minimum Loyalty Points to Redeem : 100

Loyalty Points Have Expiration Date :

Loyalty Points Expire After : 100 Days

Create Cancel

- **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.
- **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.
- **Loyalty Points Have Expiration Date checkbox:** If you want to give expiry date for loyalty points, check this checkbox.
- **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.
- Click on Create button.

6. You will see the following message. Click on Yes.

Confirm

? You have no 'loyalty points' allocation setting specified.
Do you want to specified now?

Yes No

7. This will bring the below screen of Add New Loyalty Settings. Or click on 'Add New Loyalty Setting' if you have activated loyalty program.

Add New Loyalty Settings

Loyalty Setting Name : Customer Loyalty Program

Preference Weightage : 1

Start Date : 27/05/2019 00:00:00

End Date : 27/05/2021 23:59:59

Is Default Setting : Is Active :

Include the Items which have other Loyalty Rules

Use for a Customer Group :

Customer Group :

Use for a Customer Collection :

Customer Collection :

Use for a Item Collection :

Item Collection : Camera

Referral Points : 0 (These are the points awarded to a customer who refers other customers.)

Loyalty Points Invoice Range

1.00 in Invoice Amount = <Conversion Factor> Loyalty Points
 example :
 For Conversion Factor = 1
 100.00 in Invoice Amount = 100 Loyalty Points
 For Conversion Factor = 2
 100.00 in Invoice Amount = 200 Loyalty Points

Invoice Amount Exceeding	Conversion Factor
1,000.00	0.1
5,000.00	0.2
0.00	0

Loyalty Points Flat Range

Additional Flat Points are awarded to customers on the invoices exceeding the specified amount.

Invoice Amount Exceeding	Flat Points
5,000.00	20
0.00	0

Save Cancel

- **Loyalty Setting Name:** Enter any Name for Loyalty Setting.
- **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.
- **Is Active:** This option will be checked by default. Unchecked this will make the selected loyalty setting inactive.

- **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.
- **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.
- **Use for Item Collection:** Select the item collection for which loyalty program is applicable.
- **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.

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

Loyalty Points Invoice Range

1.00 in Invoice Amount = <Conversion Factor> Loyalty Points
 example :
 For Conversion Factor = 1
 100.00 in Invoice Amount = 100 Loyalty Points
 For Conversion Factor = 2
 100.00 in Invoice Amount = 200 Loyalty Points

Invoice Amount Exceeding	Conversion Factor
1,000.00	0.1
5,000.00	0.2
0.00	0

- **Invoice Amount Exceeding:** Enter the invoice amount after which the loyalty points are applied. Item collection total in invoice should exceed the value that you enter here.
- **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 item collection total in

invoice .

1.00 in Invoice amount= Conversion Factor * Loyalty Points

Example 1: If you want to give 1 loyalty point on the selected item collection if invoice amount = 100, then conversion factor is calculated as $1/100=0.01$

Example 2: If you want to give different loyalty points for invoice range, you can define as shown below. Here I gave conversion factor as 0.1 for invoice amount exceeding 1000 and 0.2 for invoice amount exceeding 5000.

- If the invoice total from item collection is greater than 1000 and less than 5000, then the customer will get loyalty points based on the 1st conversion factor mentioned in the above example i.e. 0.1
- If the invoice total from item collection is above 5000, then the customer will get loyalty points based on the 2nd conversion factor mentioned in the above example i.e. 0.2

9. 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.

Loyalty Points Flat Range
 Additional Flat Points are awarded to customers on the invoices exceeding the specified amount.

Invoice Amount Exceeding	Flat Points
5,000.00	20
0.00	0

Example: I have defined loyalty point flat range as below. It means that if the invoice amount exceeds 5000 the customer would get flat 10 loyalty points in addition to invoice range loyalty points.

If the invoice amount is 5000 then the invoice would get flat loyalty points (10) + invoice range loyalty points (5000 * 0.1 i.e 500) with is a total of 510 loyalty points

10. Click on Save button.