

Creating and Using Loyalty Programs in Sapphire



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Setup Loyalty Programs in Sapphire

Loyalty Basics – What programs are offered?

This is a comprehensive guide on setting up and using Sapphire's built in Loyalty features. A loyalty program is used to track customers to give them an incentive for repeat visits. The same swipe cards as for pre-paid accounts can be used for Loyalty accounts. The difference is that Sapphire Loyalty accounts need to be set up before the account is used for a customer. The server can give a customer a Loyalty card without having to enter any information at that time. The customer-specific information can be added later by a manager.

There are four different types of loyalty programs that can be set up:

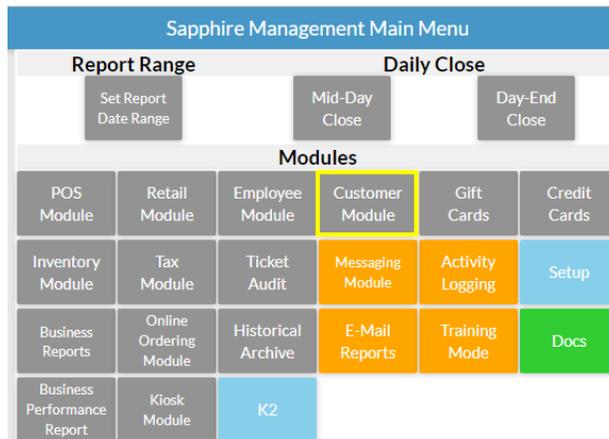
- **Add Up Sales:** This will simply track sales and add up the total unit until a specified reward level is reached;
-For Add up Sales program simply specify the amount of sales needed to achieve the reward.
- **One Each:** where a list of menu items are chosen and customers have to purchase one of each of those items;
-For this program use the lower section to specify menu items (and price size if necessary) to build up the list of items that are in this loyalty program. An item can be removed from the program by clicking on the Remove button next to the loyalty choice item.
- **Certain Number:** where a list of menu items are specified and customers have to purchase a certain number of any of those items (with multiple purchases being allowed);
-For this program use the lower section to specify menu items (and price size if necessary) to build up the list of items that are in this loyalty program. An item can be removed from the program by clicking on the Remove button next to the loyalty choice item.
- **Cash Back:** where a percentage rate can be specified and that amount of the ticket will be put into a prepaid account for the same card.
-For Cash back specify the reward rate as a percentage.

**Other than for the Cash Back type the Loyalty program will only track the sales side; it is up to each site to specify how the reward is given, once it is achieved. Some examples can include a discount off a meal or item, a plaque, a shirt, etc.*

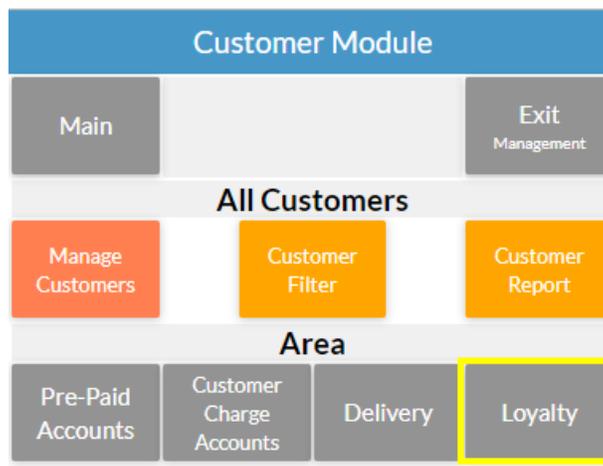
NOTE: If a reward is being applied to a loyalty account it is the server's responsibility to signify the reward is being applied so the loyalty account is reset to start counting over.

Setting up the Loyalty Program

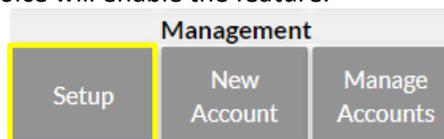
1. Log into **Manage System**
2. Select the **Customer Module**



3. Select **Loyalty**

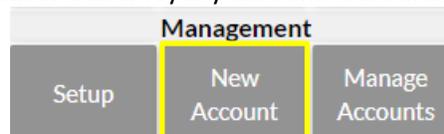


4. Go to **Setup** and choose from the type of loyalty account you are setting up. A choice of none will disable the feature; any other choice will enable the feature.



Adding Loyalty Accounts

1. Select **New Account**. This will allow a new loyalty account to be created.



2. Swipe the magnetic loyalty card to create an account. The account number and customer identifier are based on the account number encoded in the card.

NOTE: Since the customer information may not be known at the time the customer enters the loyalty program you may want to create several "blank" accounts that have a card set up. The card can then be given to the customer and the customer information can be added on their return visit.

3. Add customer information if available

If the customer is a business, use the *First Name* Field so the account can be found correctly using the filtering on *All Accounts Report*

Manage Customer			
Edit Customer			
Back			Submit Customer Changes
Identifier	9666584233614	Status	<input type="checkbox"/> Inactive
First Name	John	Last Name	James
Company			
Spouse			
Address			
City		State	
Zip		Phone	
Customer Since	12/04/2019	Birthdate	mm/dd
Anniversary	mm/dd	Spouse B-Day	mm/dd
E-mail			
Notes			
Show/Edit PrePaid Account	Show/Edit Loyalty Account	Show/Edit Charge Account	Show/Edit Delivery Info
Show/Edit Discount Info			
Loyalty Account Information			
Update Account	Account Number	9666584233614	Associate Magnetic Card
	Issue Date	Dec 04, 2019	Reset Account
Last 10 Transactions	View Last 10 Transactions	Add Adjustment Transaction	
Date/Time	Type	Amount	Balance

Managing Loyalty Accounts:

1. Select Manage Accounts

Management		
Setup	New Account	Manage Accounts

This will allow you to edit customer information for customers with a loyalty account. You can also enter adjusting transactions through this screen by finding the customer, clicking on the Edit Button, and then clicking on the Add Adjustment Transaction.

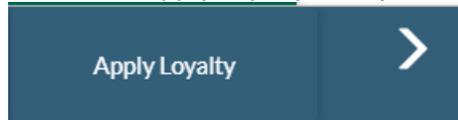
Loyalty Account Information			
Update Account	Account Number	9666584233614	Associate Magnetic Card
	Issue Date	Dec 04, 2019	Reset Account
Last 10 Transactions		View Last 10 Transactions	Add Adjustment Transaction
Date/Time	Type	Amount	Balance

Applying Loyalty to Tickets:

1. Go to **Manage** and select **Apply Loyalty**

Manage Food Ticket - 1912040014					Complete (0)
Order Split	Merge Ticket	Move Items	Transfer	Cancel Ticket	
Apply Discount	Apply Surcharge	Apply Loyalty	Add/Renew Prepaid Account	Cancel Items	
	Convert Ticket Type	Assign Customer	Open Tab		

If you are using Cash Service, you can select **Apply Loyalty** from your Cash Service toolbar



2. You can search by Account Number, Name, Phone, or Email
Click **Search** then **Apply Points**, if they have reached their Loyalty Reward level you can then select Use Reward or Remove points if you accidentally put them on the wrong Loyalty Card.

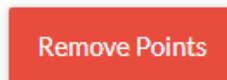
Customer Loyalty Accounts Ticket - 1912040017

Customer:
Loyalty Account: 9666584233614

Points This Ticket: 5
Current Points: 0



3. If their reward level has been met, you will be prompted **Use the Reward**



Customer has met the reward level of 5 points.

Click the button below to redeem the reward and remove the redeemed points from the account.



Print their Current Balance

1. Select **Loyalty Acct Balances** button on the front page of Sapphire.

Video Terminal	Manage System
Prepaid Balances	Loyalty Balances
Gift Card Terminal	Retail Terminal
Fulfillment Routing	Enter Training Mode

2. Swipe the card or enter the account number and the account history will be shown.

Account 9666584233614	
Current Points	1
Customer needs 1 more point(s) to meet the reward level of 2 points.	
Print (T1)	Done

Recent Account History			
Date	Type/Ticket	Points	Curr Points
12/04/19 4:26pm	16036	1	1
12/04/19 4:25pm	Reward (16035)	-5	0

If the type of program is *One Each* the remaining items to be filled will be shown as well. For all types of loyalty programs the number of remaining points needed to achieve reward level will be shown. If a printer is associated with the terminal the transaction history can be printed out.

For the *Cash Back* program information about each ticket being applied to the loyalty account is recorded while a simultaneous entry into a prepaid account (for the same customer and loyalty card) is recorded. When looking at the current loyalty account balance for a Cash Back program only the loyalty entries are shown - the uses of the related prepaid account are not shown. This means the account will keep growing and to get a true representation of the currently prepaid liability for a reward account, the prepaid account should be looked at.

NOTE: the same account number cannot be used for both loyalty account and a Prepaid Account. This is to avoid confusion if the Cash Back program is ever used.