

Customer Reward Program

You love your customers. You know that if it wasn't for them, you wouldn't even have a business to operate. So why not reward them for shopping at your store? Another punch card to carry... let's not even go that route. But what if you could use the same concept and track the points (or punches) in your database? Let's explore the Reward Program within POS•IM:

Mac:

1. First Step: Set up your Customer Reward Groups.
 1. Open Sales Client.
 2. Click on Lists (in the menu bar), then select Customer Reward Group.
 1. Create the different reward groups you want to use for each type of customer, ie: Silver Group for any default customer, Gold for your frequent customers and Platinum for your preferred customers. (In the next step we'll set up how these groups receive rewards based on the items they purchase.)
2. Second Step: Setup your Item Reward Groups. This is where you assign the number of points your customers will receive when they purchase certain items.
 1. Open Sales Client.
 2. Click on Lists (in the menu bar), then select Item Reward Code.
 3. Create a new Item Group by pressing the + button. Enter a code ID and a Description.
 4. Press the "... " button on the right hand side of the first row.
 1. Enter the Customer Reward Group (from step 1) this will apply to.
 2. Select what the points will be based on: quantity of item sold or the price of the item sold. You will also need to assign a factor to calculate the points. For example if you choose price of the item and a factor of one, then customer's in this group will get one point per dollar they spend.
 3. You can also specify that points not be given if they do not receive a certain amount of revenue (above a certain margin, or below a certain discount).
3. Last but Not Least: Activate the Reward Program.
 1. Open Sales Client.
 2. Select File>Preferences>Misc and choose Rewards Points. This is where you will set up how many points are required for a reward to be issued and the message a clerk sees when someone reaches that point level.
 3. Check the box to Use Reward Points and to Print Point Level on Receipts.
 4. Select which Customer Reward Group and Item Reward Code will be the default (applied to any customer without a reward group on their customer card, and any item without a reward code on their item card).
 5. Enter the point level at which customers receive their reward.
 6. Add the messages that will appear when the customer receives their allotted number of points.
 1. The clerk message will appear on the screen to the clerk when the invoice is posted. You should enter a message to tell the clerk what to do (tell the customer something in a congratulatory sense or give the customer something).
 2. The printed message will print on the customer's receipt letting them know what they have received for being such a loyal customer.
 7. If you would like a coupon to print on the customer's receipt you can attach it in the coupon section. This will print at the bottom of the receipt when the reward level is reached.

Windows:

1. First Step: Set up your Customer Reward Groups.
 1. Open Inventory Analyzer.
 2. Select Window (in the menu bar), then Customer Reward Groups.

1. Create the different reward groups you want to use for each type of customer, ie: Silver Group for any default customer, Gold for your frequent customers and Platinum for your preferred customers. (In the next step we'll setup how these groups receive rewards based on the items they purchase.)
2. Second Step:
 1. Open Inventory Analyzer.
 2. Select Window (in the menu bar), then Item Reward Groups.
 3. Create a new Item Group by pressing the + button. Enter a code ID and a Description.
 4. Select a Customer Reward Group to apply your reward to from the drop down in the first row.
 5. Choose from the Based On drop down what your points will be based on: quantity of item sold or the price of the item sold.
 6. Enter the Factor to calculate the points. For example if you choose price of the item and a factor of one, then customers in this group will get one point per dollar they spend.
 7. You can also specify that points not be given if you do not receive a certain margin percentage. Check the box and enter the minimum margin percent.
3. Third Step: Activate the Reward Program.
 1. Open Sales Point.
 2. Select File>Shared User Controls. Click on the Rewards tab. This is where you will set up how many points are required for a reward to be issued and the message a clerk sees when someone reaches that point level.
 3. Check the box to Use Reward Points and to Print Point Level on Receipts.
 4. Select which Customer Reward Group and Item Reward Code will be the default (applied to any customer without a reward group on their customer card, and any item without a reward code on their item card).
 5. Enter the point level at which customers receive their reward.
 6. Add the messages that will appear when the customer receives their allotted number of points.
 1. The clerk message will appear on the screen to the clerk when the invoice is posted. You should enter a message to tell the clerk what to do (tell the customer something in a congratulatory sense or give the customer something).
 2. The printed message will print on the customer's receipt letting them know what they have received for being such a loyal customer.

Use Reward points! Share the joy and spread the love.