# LoyaltyMate
Training Manual

Company Admin - LoyaltyMate Website Log In

Login to the website using your admin email and password. These will have been sent to you previously. If not please contact loyaltymate@loyalty-mate.com so we can help you login.

From the **DASHBOARD** screen you can see statistics of data gathered through LoyaltyMate. How many members have joined, the female to male ratio, how many points have been earned/spent, birthday and first visit bonus's and the total Loyalty Balance.
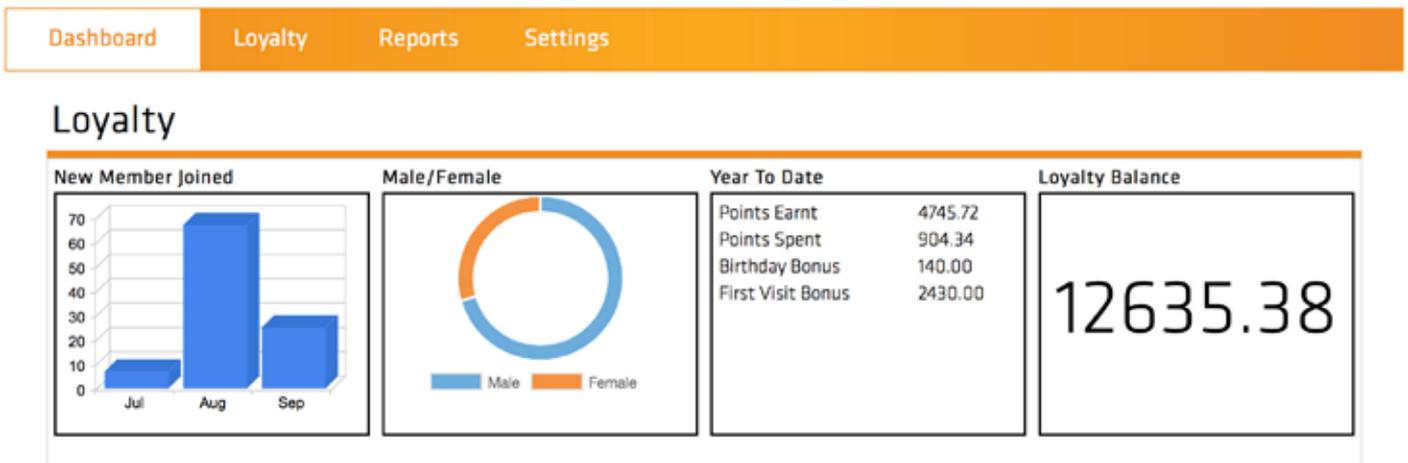
Company Admin - Email Setup

1. Email - Same email address as From Email

2. Password - The password for the above address

3. Email Provider

   i. GMAIL – If your email address is with GMAIL then select this. It will automatically fill in the SMTP Server , Port, Delivery method and turn Secure Socket Layer on.
   Note: In your GMAIL account you need to allow access to less secure apps. Log in to your GMAIL account, go to Account Settings, under Sign In and Security go to Connected Apps and Sites. Check that "Allow access to less secure sites" is on.

   ii. HOTMAIL/OUTLOOK - If your email address is with HOTMAIL then select this. It will automatically fill in the SMTP Server , Port, Delivery method. Secure Socket Layer should be off.
   Note: You will need to go into your Hotmail accounts security and privacy settings. You will need to check that the recent activity recorded was you.

   iii. YAHOO - If your email address is with YAHOO then select this. It will automatically fill in the SMTP Server , Port, Delivery method and Secure Socket Layer.
   Note: The "From Email" and "Email*" should be the same.

   iv. OTHER – If your email address is not with any of the above then you will need to select this. You will also need to find from your email provider the SMTP Server Address and the Port number. Some providers supply the SMTP Server Address and Port Number on their websites or they can be found via google search. Others will need to be asked for.

4. Once you have filled in the settings, click the Validate button.

5. The web app will confirm the details and ask for a validation code (which will have been sent to the account your signed in as).

6. Enter Validation code, confirmation will pop up.

7. Click on save button.

   You email setup is now ready to go.

   NOTE: MOST email providers have a limit on how many emails you cant send at one time. For example GMAIL you can only send 500 a day.

   If you are wanting to send large bulk emails use Mailchimp or contact your email provider.

Company Admin - Loyalty

From the Loyalty section on the website you can view and create Vouchers, Gift Cards, Discounts, Tier Levels, Menu Items for the Mobile App and Groups.
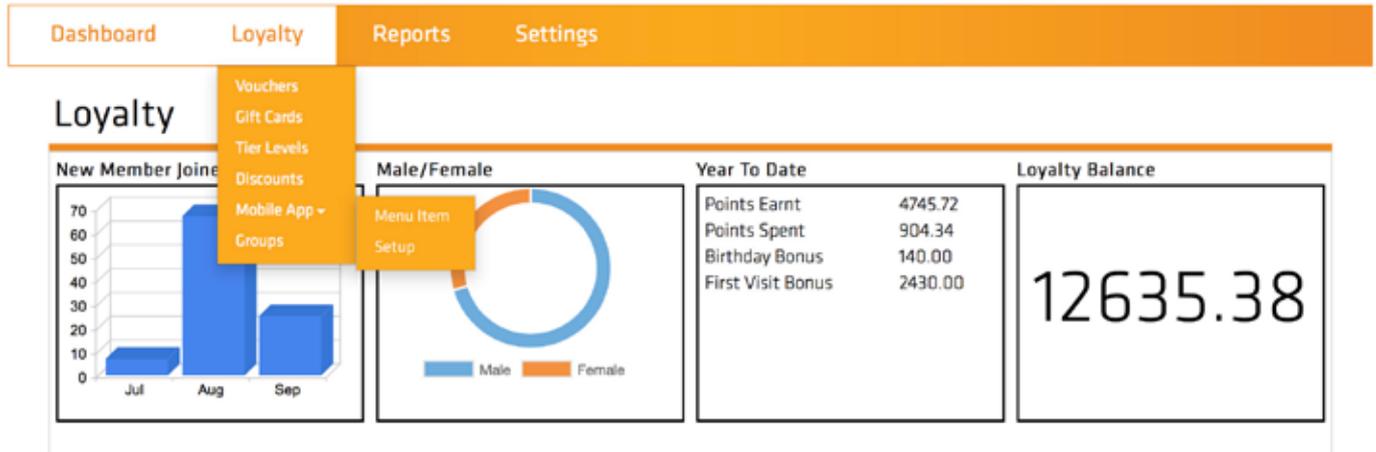
Company Admin - Setting up discounts

Discounts can be fully managed from LoyaltyMate by the administrator and synchronized to Menumate Point of Sale instantly.

All of the discount functionality in Menumate POS is now in LoyaltyMate with additional features.

Description area – This is what will appear in the voucher on the app so fill this in if you are wanting a description of the discount/voucher to be viewable to the customer on the app.
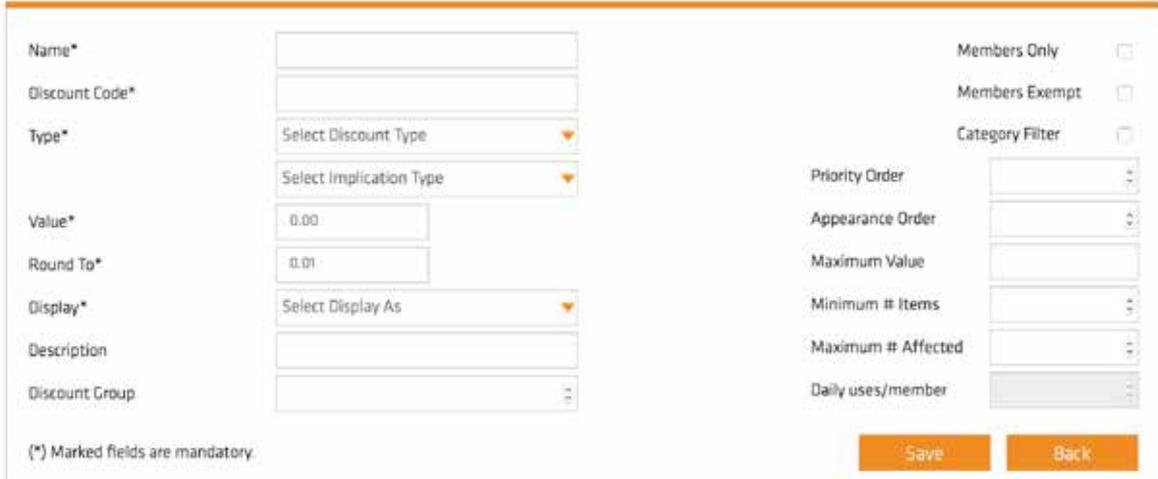
Minimum # Items and Maximum # Affected allows you to control how a discount is applied e.g. 2 for 1 Coffee would be setup as follows;
•   Name: 2 for 1 Coffee
•   Category Filter would be ticked*
•   Type would be % and the value would be 100
•   Minimum # Items would be 2
•   Maximum # Affected would be 1

When this discount was applied the CHEAPEST coffee would automatically be discounted by 100% and as you added or changed coffee selection the discount would update automatically to the cheapest. It would only apply once at least 2 items were sold and only apply to 1 item. So if 4 coffees were sold only 1 would be discounted.

* By ticking the option Category Filter a new breakdown category under a group of Loyalty Discounts is automatically created in the menus allowing you to add this filter to your menu items that can have this discount applied. Discounts create in LoyaltyMate cannot be edited or deleted in the POS.

Company Admin - Setting up discounts continued

Discount Field Descriptions

1. **Name*** - Enter the name of the discount e.g $10 of Any Time

2. **Discount Code*** - This is distinct number that will be used to link to a voucher.

3. **Type*** - You need to select a "Discount Type" And the "Implication Type"

   Discount Type
   - % - Percentage
   - $ - Dollar
   - Combo - Combination of items
   - Item Mode - Select/Certain Items
   - Set Price -

   Implication Type
   - Discount
   - Surcharge
   - Points

4. **Value*** - The value of discount e.g 10.00

5. **Round To*** - Ability to round the discount result e.g 0.01

6. **Display***
   - Fixed Description
   - Prompt Description
   - Prompt Amount
   - Prompy Description and Amount

7. **Description** - Explains what the discount does. This is what appears in the voucher screen on the app.

8. **Discount Group** - Apply the discount to a specific group. A dropdown of the groups will appear to select

9. **Members Only** - If ticked it will only be assigned to a member/s

10. **Member Exempt** - If ticked it will NOT be applied to a member/s

11. **Category Filter** - If ticked a breakdown category will be created for filtering

12. **Auto Members** - Every member

13. **Priority Order** - Order in which the discount is applied

14. **Appearance Order** - Order in which the discount will appear on the POS

15. **Maximum Value** -

16. **Minimun # Items** - The minimum number of items for the discount to be applied to e.g 2

17. **Maximum # Affected** - The maximum number of items the discount will be applied to e.g 3. 5 items purchased, only 3 will be applied the discount to.

18. **Daily uses/member** - Not available Yet

Company Admin - Setting up vouchers

LoyaltyMate has a voucher module that allows an administrator to drive customer spend, issue vouchers and manage how a voucher is used. By building a selection criteria vouchers can be sent (via email and to the member's app) to only valid members.
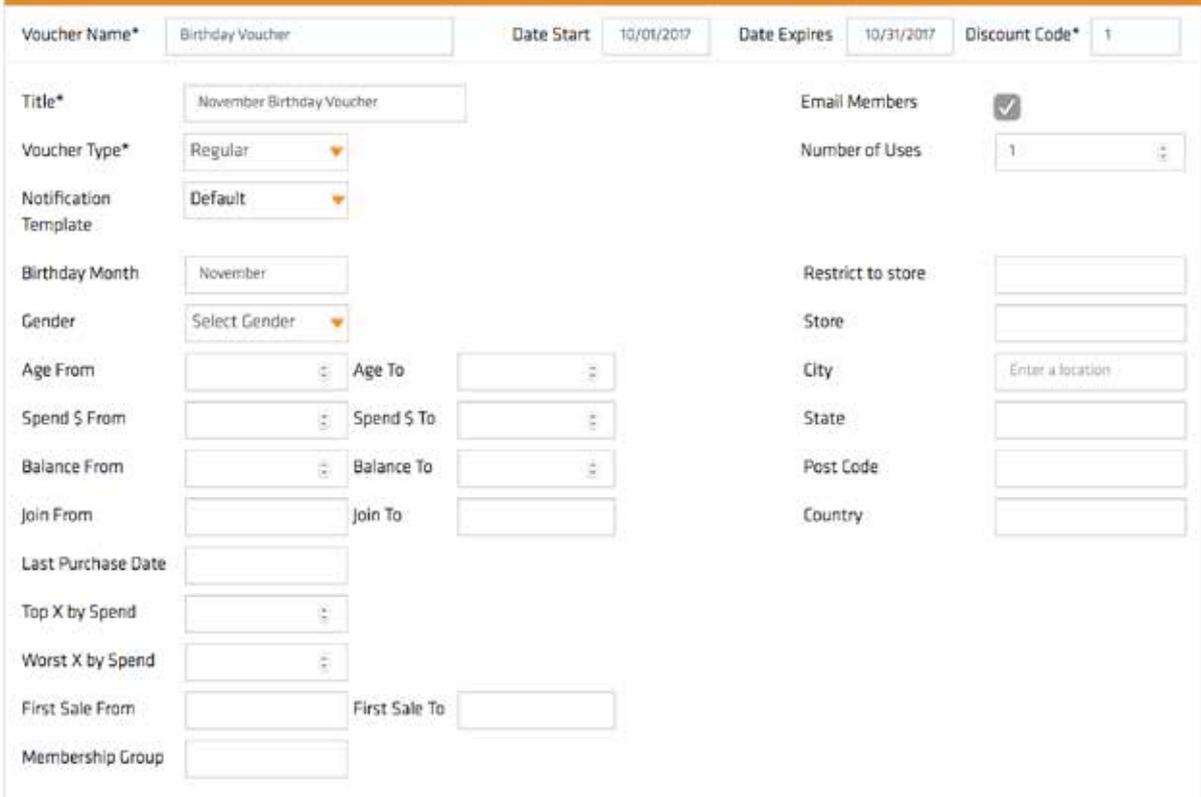
Example above will send a voucher to all members who have a birthday in November. The voucher will be emailed to the members and can only be used once between 1 November 2016 and 30 November 2016 and when used will have discount code 1 (50% Food) applied to their purchase.

When SEND VOUCHERS is selected the valid members are displayed and the administrator can export the members list (to send via a 3rd party email client e.g. Mail Chimp) or select Send Email and Vouchers. Having "Notification Template" set as default will send a default notification to all customers phones you send this voucher to as well as emails if you have "Email Members" ticked.

Voucher description that appears on the app is created when you create the discount code.

Date expiry and number of uses if filled in will appear in the voucher area on the app.

For button creation that appear in the voucher screen refer to page 18 and 19.

Company Admin - Setting up vouchers continued

To create a voucher, a discount needs to have been created so you can fill in the code.

Voucher Field Description

1. Voucher Name* - Has to be unique to the voucher.

2. Title * - A voucher name that the customer will see and can used multiple times.

Example for voucher name and title. If you are doing a Special of the month every month, then Title will be "Special of the Month" every month. Where as the Voucher Title has to be different so would be "Special of the Month October" etc.

3. Date Start - Date you want the voucher to start from

4. Date Expires - When you want the voucher to expire/stop

5. Discount Code* - The code of the discount that will be applied to the member

Other Criteria Used to Filter Information before sending to Members

- **Birthday Month** - Select a month you want to apply the voucher to e.g only send to people in November

- **Gender** - Gender you want to send the voucher to e.g female

- **Age From/To** - Age group you want to send the voucher to e.g 20 - 30 yr olds

- **Spend $ From/To** - Range of money spent e.g send to people who have spent between $100 to $200

- **Balance From/To** - Range of points the customer have e.g only send to members who points balance between 25 - 100 points.

- **Join From/To** - Range that a customer joined in.

- **Last Purchase Date** - Members last purchase dates e.g send to people whose last purchase was June 2016

- **Top X by Spend** - Only send to a select number of your top spenders. e.g Send to top 5 spenders - a reward.

- **Worst X by Spend** - Only send to a select number of your worst spenders e.g send to worst/lowest 30 spenders - an insentive to come back

- **First Sale From/To** - If they had their first sale between the dates e.g had first sale between 01/01/16 - 01/02/16

- **Membership Group** - Select a member group to send the voucher to

- **Email Members** - Ticked will send emails to customers

- **Number of Uses** - How many times the voucher can be used

- **Restrict to Store** - If you have multiple sites/stores the voucher can only be used at the selected store

- **Store** - Voucher will be sent to people who use/signed up at this store

- **City** - Voucher will be who have the selected City in their Profile

- **State** - Sent to people who have the selected State in their Profile

- **Post Code** - Sent to people who have the selected Post Code in their Profile

- **Country** - Sent to people who have the selected Country in their Profile

- **Notification Template** - Select template to use for notifications that will appear on customers phone.

Company Administrator - Sign Up, First Usage and Tier Level Vouchers

Sign Up, First Usage or Tier Level Vouchers are automatic vouchers that you can setup from the voucher creation page. These are vouchers that the customers will receive straight away when they sign up or first time they make a purchase or move up a tier level.
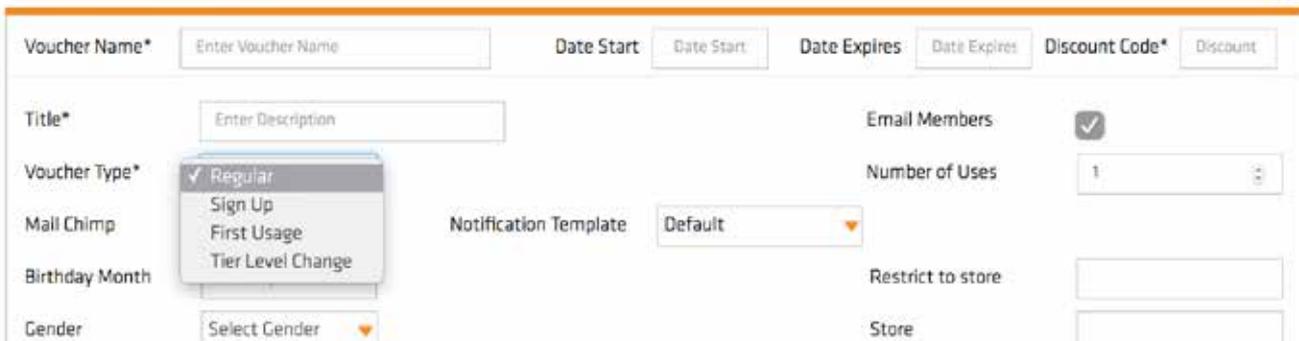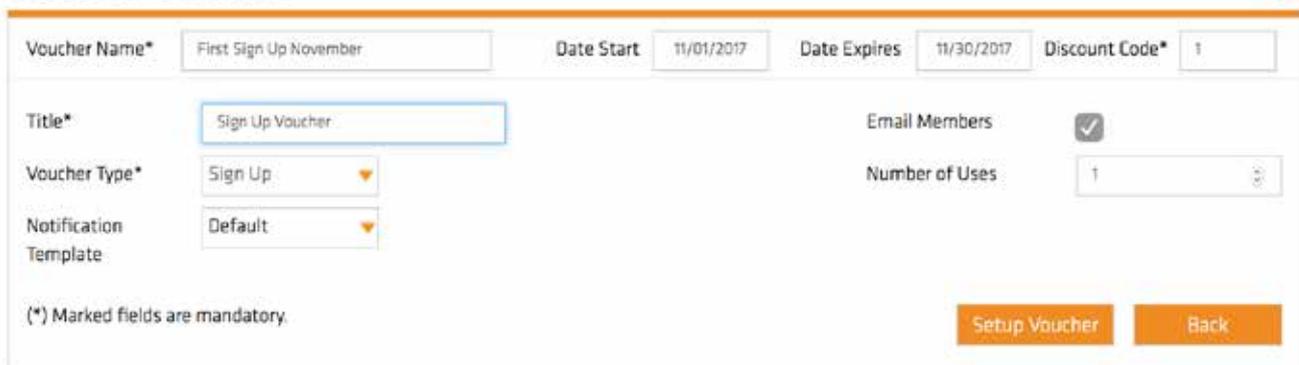

Under voucher creation page > in Voucher Type* > Choose between sending a regular voucher, sign up, first usage and tier level change.

Setting up Sign Up, First Usage and Tier Level Change vouchers all have the same parameters to setup.

The example above is setting up a sign up voucher.

1. Fill in the Voucher name(Unique voucher name) and the Voucher Title Name(what the customer sees)
2. Select the discount code. Need to create a discount, refer to page 5 of Training Manual.
3. Select the start date and expiry date.
(*Note set the expiry date for a lot later date, 6 months - 1 year expiry. Next update for the LoyaltyMate website will have 'Select X amount of days for expiry from the time of sign up).
4. Select the number of times the voucher can be used.
5. Select the notification template and if you have mailchimp setup select the template for the email.

Select setup voucher and the voucher is ready for whenever a customer signs up.

Company Admin - Push Notifications
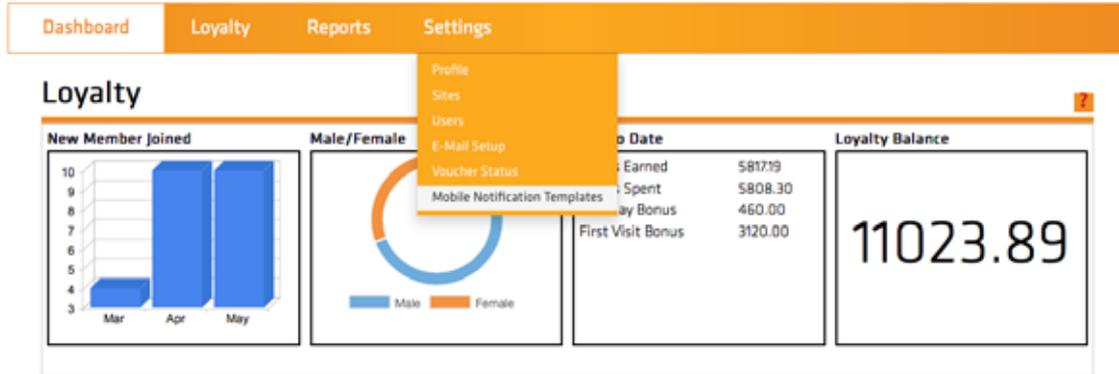
1. Under settings select Mobile Notification Template.
2. Create a notification template that you will use to notify the customer on their phone of a voucher
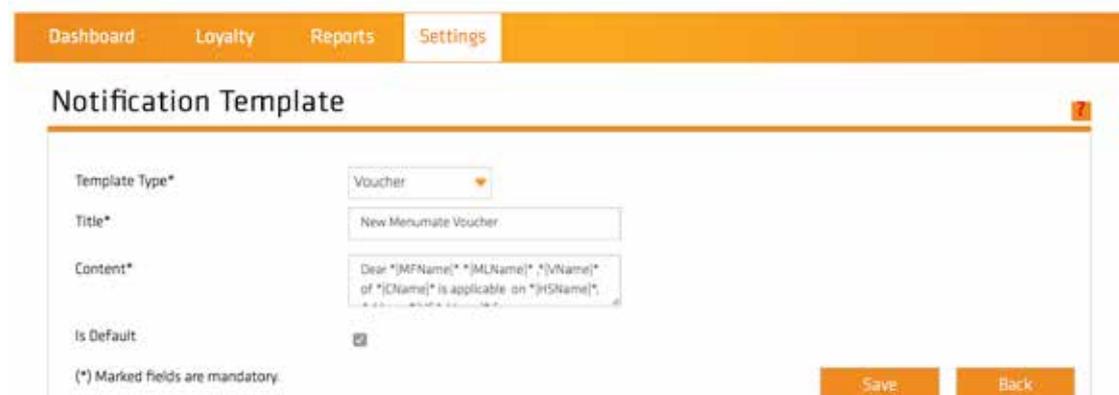
3. Template Type - Select Voucher
4. Title - Whatever you would like the Template name to be.
5. Content - You can fill the content in with the description of a specific voucher or have content that is usable for any voucher.
6. There is an option to merge tags which allows you to add content to your email for each specific person. An example of this
    " Dear *|FName|* *|LName|* ,*|VName|* of *|CName|* is available"
    This will add in there first name, last name, the voucher name and the company name.
7. Default - Tick this box to have one template that is the default template for all voucher notifications. To select a different template as the default you need to unselect it and then select it in the new default template.

Company Admin - Push Notifications Continued

1. When you have a a notification template set up, go to Vouchers.
2. In the voucher creation page there is a notification box where you can select the template to use.

3. Once you have set up the voucher and applied a notification template you can send it to the customers, they will get a notification on their phones letting them know the voucher is available to them.
   (Note: Customer needs to have their notifications on to receive the notification.)

Company Admin - Importing vouchers

LoyaltyMate has a manual voucher system. Vouchers are imported into the voucher server with a voucher number (or barcode number) and each voucher is linked to a discount code e.g. $10 Voucher and has a maximum number of uses PER voucher.
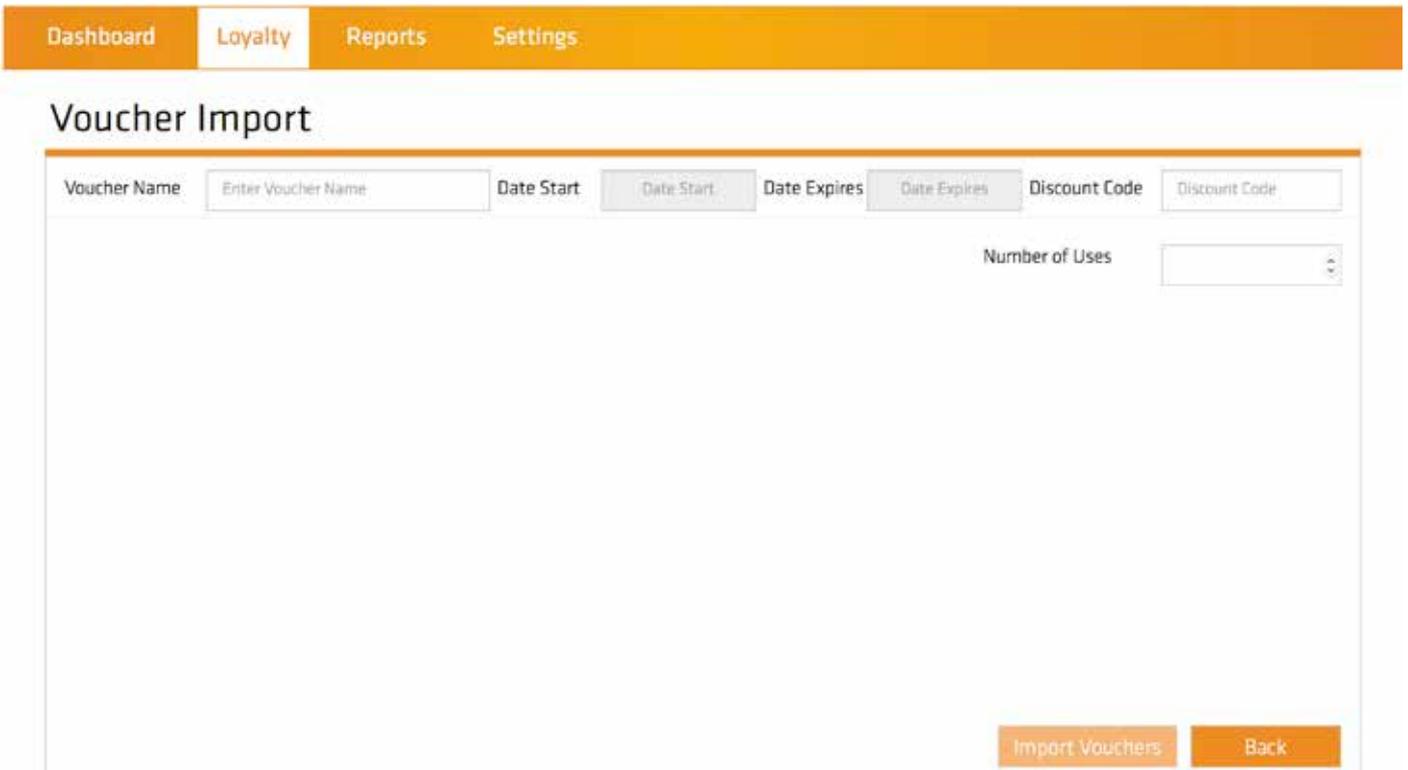
Dashboard	Loyalty	Reports	Settings

Voucher Import

Voucher Name	Enter Voucher Name	Date Start	Date Start	Date Expires	Date Expires	Discount Code	Discount Code

Number of Uses

Import Vouchers   Back

The format of the voucher file is a CSV (comma separated value) file. The name of the file is not important. The format of the file must be a simple list of voucher numbers and the voucher number MUST be unique and not have been imported or used before.
e.g.
310001
310002
310003
310004
310005

Company Admin - Importing gift cards

LoyaltyMate has a gift card system. Gift Cards are imported into the gift card server with a gift card number (or barcode number) and a gift card value.

The format of the gift card file is a CSV (comma separated value) file. The name of the file is not important. The format of the file must be gift card number, gift card value and the gift card number MUST be unique and not have been imported or used before.

e.g.
- 410001   100
- 410002   50
- 410003   100
- 410004   50
- 410005   100

Company Admin - Tier levels

Tier levels are a great way to reward your members and give them an incentive to continue using the loyalty program.

You can set the tier levels to a certain amount of points and add certain rewards to the tier level. A higher birthday bonus, higher points per purchase.

Once the customer has reached the amount of points required for the tier level, they will receive these rewards and then be able to go towards the next tier level.

You can create a automatic voucher that will send out to a customer when they move up tier levels via the voucher creation page. Refer to page 9.

Company Administrator - Tier Levels Continued

Tier Level Field Descriptions

1. **Tier Name*** - Name you want the tier level to be e.g Bronze

2. **Tier Level Number*** - Number of Tier Level e.g 1

3. **Points Required** - How many points they need to be in this tier level i.e 1000

4. **Birthday Bonus** - When they are in this tier level and its their birthday they could get 'X' number of points as a bonus

5. **Price Products*** -

6. **Weighted Product*** -

7. **Email Members** - WIll email the member once they have reached this tier level.

8. **Email Head Office** - Will email head office to let them know when someone has reached this tier level

9. **Change card** - You might have different cards for different tier levels - if ticked this will require a new card to be given to the member

10. **Allow Redemption** - TIcked so the members in this tier level can redeem the birthday bonus and any discounts.

Company Admin - Specials/Promotions

The specials area on the app is a great way to not only show menu items and specials you have instore but also promote upcoming events and vouchers they can receive on sign up, first usage, tier levels and other vouchers they will receive.

From here you can create, edit, deactivate/reactivate and delete your menu items.

To create a menu item that will be uploaded and viewed on app instantly:

Click 'Create' a screen will load showing "Mobile App Menu Items".
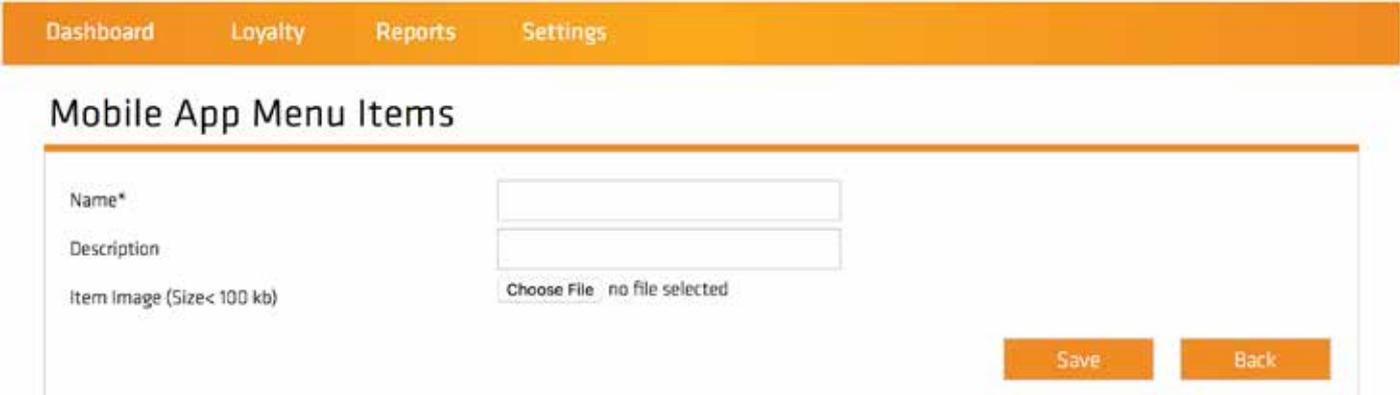
Fill in the name of the item and the description of the item. If required add the amount of "Points" rewarded in the file name or description.

Select an image. The file size should be no larger than 100KB. JPEG or PNG file is accepted.

Once saved this can edited and deactivated. To reactivate an item, click the "Show Deactivated Menu Item" button and next to the item you want to reactivate click "Activate".

Company Administrator - Groups

Groups are a great way to organise certain members together and then assign vouchers to them.
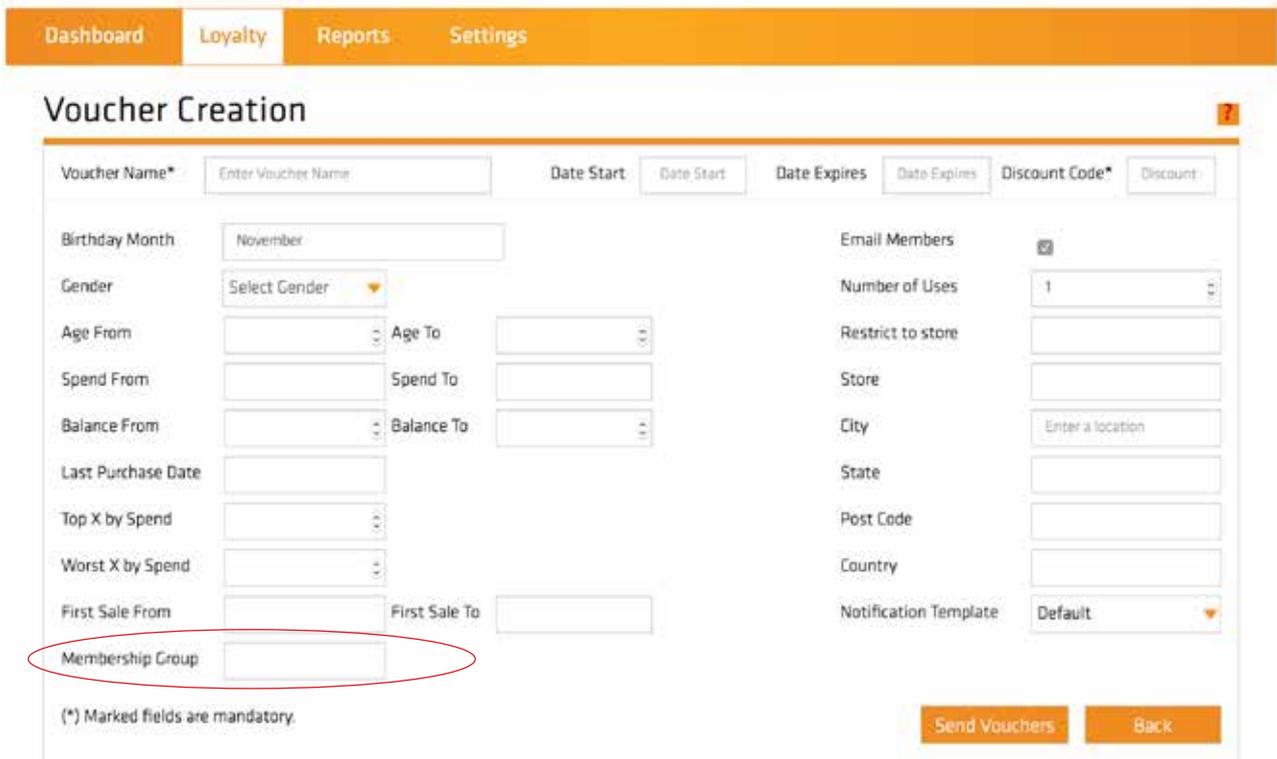
Unlike Vouchers which can be set to certain criteria. The groups are created by you.

For example, if you had a group of 10 regulars who come in once a week. You could put them in a group called "regulars". This can be done by 'Create" search the Name or email address and add them to the group.

Then you can create a voucher specifically for them and add the group name "Regulars" and send it to just these few.

Company Administrator - Reports

Reports show a range of data that LoyaltyMate gathers and you can use to help your business and analyse these results to maximise LoyaltyMates potential.

Birthday Reports, Loyalty Customer Details, Loyalty History, Audit Summart, Points balances and Voucher Analysis.

On certain reports click the filter button to change the parameters.

Company Administrator - Settings - Profile

When you are logged in as the Company admin you can change the company details.

Under settings and then into Profile.

From here you can change the Company Name, Address, Contact Details, Company Logo and the Background Image that will appear on the members website.

If you want to have book now, call now etc appear on vouchers in the app you create you need to have the show "book now" etc ticked. **To set up buttons refer to page 19.**

From here you can also enable or disable push notifcations.

Company Admin - Sites and creating buttons

Create sites for your stores. These will be visible in the "Location" section of the mobile app.

Creating Site buttons for vouchers

In each site setup page there is 4 areas circled below book now, call now, address and website. These 4 areas are what you fill in and when you have them ticked in company profile section (Page 18) buttons will then be created on the voucher description page in the app.

-        **Book Now URL & Email** – Fill in with a email address for bookings or a URL for bookings if you want. Note: You can only fill in one of these. The one you fill in is the one that will link to the Book Now button.

-        **Call Now** – Enter a number for customer to contact you or make a booking.

-        **Directions** – The information that you enter in the Address, city, country area is what will be used for this button. It will take the customer to the map for where to find you.

-        **Website** – Link to your website.
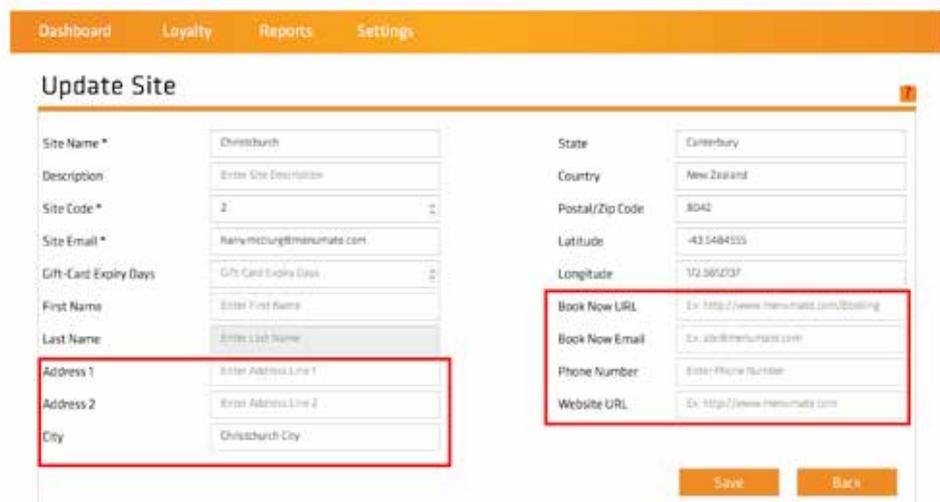
Company Administrator - Member Edit/Update Members

Member Edit

Find Member Email

| Member Email | | Find Email | Clear |

As a company admin you can search and update your members details from the LoyaltyMate site.

1. Search customers email address.
2. Change required details.
3. Save.

This will then update the customers details and send them an email to let them know their details have been updated.

Company Admin - Users/Voucher Status

Users - Add and remove company administrators.

Voucher Status - By entering the voucher code or gift voucher code you can find the gift voucher and check its status

Customer Registering/Login

Once LoyaltyMate has been set up on your POS system your customers are able to start using it.
First though they must be registered to LoyaltyMate.

New Customers

If they are a NEW CUSTOMER its very simple. They can download the app and register or register via the website.

A new member can be created by pressing the membership button and creating them at the POS.
Once they have set up their account and received a confirmation email. They are ready to start using their QR code.

If your wanting to give all new customers a card AND be on LoyaltyMate then you can begin the sign up process for them by pressing blue membership button and pressing new, type in their email address and they will get a confirmation email and asked to create a password.

Existing Customers and Point Transfer

When an existing loyalty customer swipes their card or smart card if an email address is attached to this card, then they will automatically get a email and be asked to create a password.

Once that is done their points are automatically transferred over to LoyaltyMate and can be viewed on the app or on the website.

They can now start using the QR code on their app and/or continue using their swipe or smart card.

Customer - LoyaltyMate App

Once the app has been downloaded there will be an option to Sign In or Create Account.

Creating account
With email, name, last name and password. Password must have min 8 characters, contain a numeric value, upper case, lower case and a special character. A confirmation email will be sent. Once confirmed, they can start using the QR code in the bottom right corner of every screen to collect points.

Dashboard Screen
From the DASHBOARD screen the customer can access available Vouchers, rewards they have earned and their points, menu items and your stores location/s.
QR Code is visible from every screen at the bottom right hand corner. The QR code is what you use to scan for points. The QR code is selected to enlarge it and placed in front of the scanner.

Vouchers
Shows the customers vouchers they have available. They can click into the voucher to get a description, expiry date and number of uses.

Rewards
Shows the customers tier level, points earned and purchased, birthday and first time visit bonus points. Redeemed points and current year earned points. And how many available points they have to redeem.

Specials
Shows the customers your specials.

Location
This will show your customers your nearest shop between a 1km – 100km radius. The area radius can be changed in the location section in the drop down menu at the top right corner if the app. If you have one store location. There will be no location radius option available in the drop down menu. It will automatically show where you are on the map if it's within the max km radius.

Location & Profile in drop down menu
Shows area radius option. Shows all the customers details, this can be edited via the app by selecting on the area you want to change. Click save to complete change or back to cancel the changes.

Customer - LoyaltyMate Website

From the website the customer can create an account, edit their profile, see their points and points history and vouchers that they have.

Using LoyaltyMate with Menumate Point of Sale

LoyaltyMate works the same with Menumate Point of Sale as the original loyalty system does. New features have been added with Tier Levels and Vouchers (see LoyaltyMate Vouchers) but the sales process remains the same.

Scan the members QR code on their phone, swipe their MSR loyalty card, insert their chip card or their proximity card and the member's details will appear on the POS as normal.

Loyalty points are earnt, loaded and spent the same way as the original Menumate loyalty system.

The difference is that the data is being collected from the cloud database and not from the local database or chip card.

Using LoyaltyMate vouchers with Menumate Point of Sale

LoyaltyMate has an inbuilt voucher generation and redemption system. Vouchers are available to valid members via their app. When a member scans their app or card on Menumate POS then a list of valid vouchers will appear allowing them to choose to redeem them.
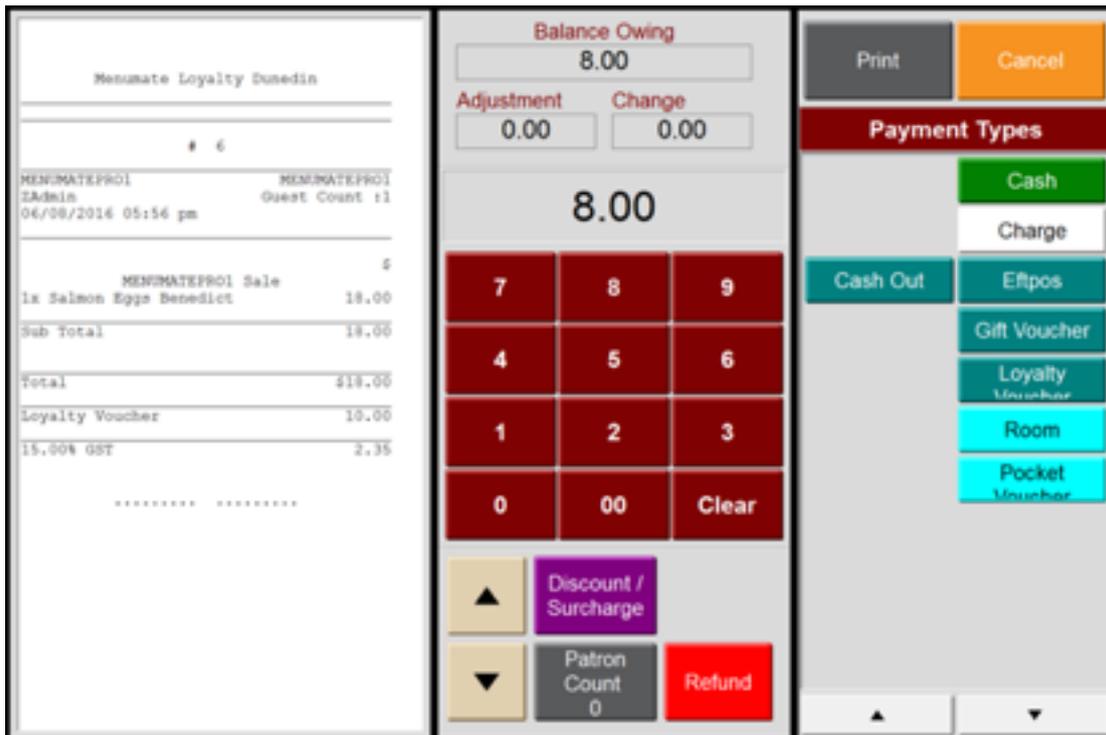

To redeem a voucher simple, select the voucher and allow the system to manage the discounts and promotions automatically.

Vouchers are managed and distributed from LoyaltyMate website by the administrator.
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# Using a manual voucher with Menumate Point of Sale

A manually imported / printed voucher is redeemed using the normal tender process in Menumate POS

To redeem a voucher simply sell the items, press tender, press Loyalty Voucher and enter (or scan or swipe) the voucher number. Menumate POS will check that the voucher is valid and then apply the associated voucher value to the sale e.g. $10.00 and the operator can then process the balance of the payment to Cash or EFTPOS.
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Using a gift card with Menumate Point of Sale

A gift card is redeemed using the normal tender process in Menumate POS
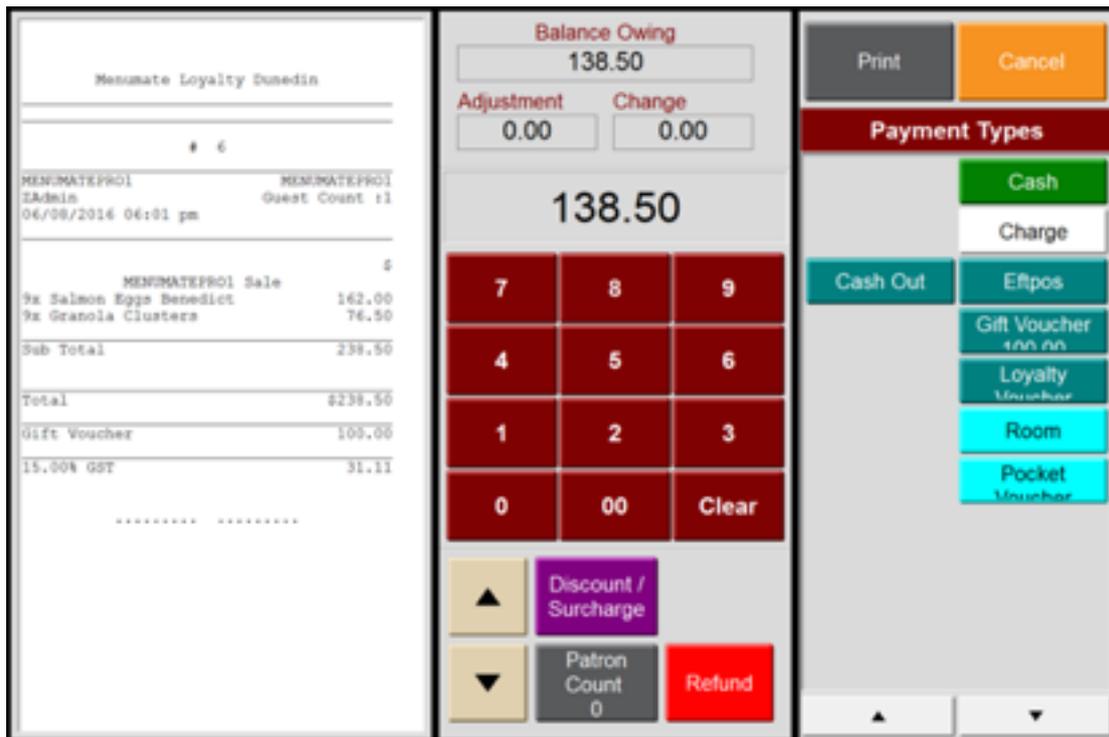
To redeem a gift card simply sell the items, press tender, press Gift Voucher and enter (or scan or swipe) the gift card number. Menumate POS will check that the voucher is valid and then apply the associated gift card value to the sale e.g. $100.00 and the operator can then process the balance of the payment to Cash or EFTPOS.
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