



Enhanced Loyalty Guide

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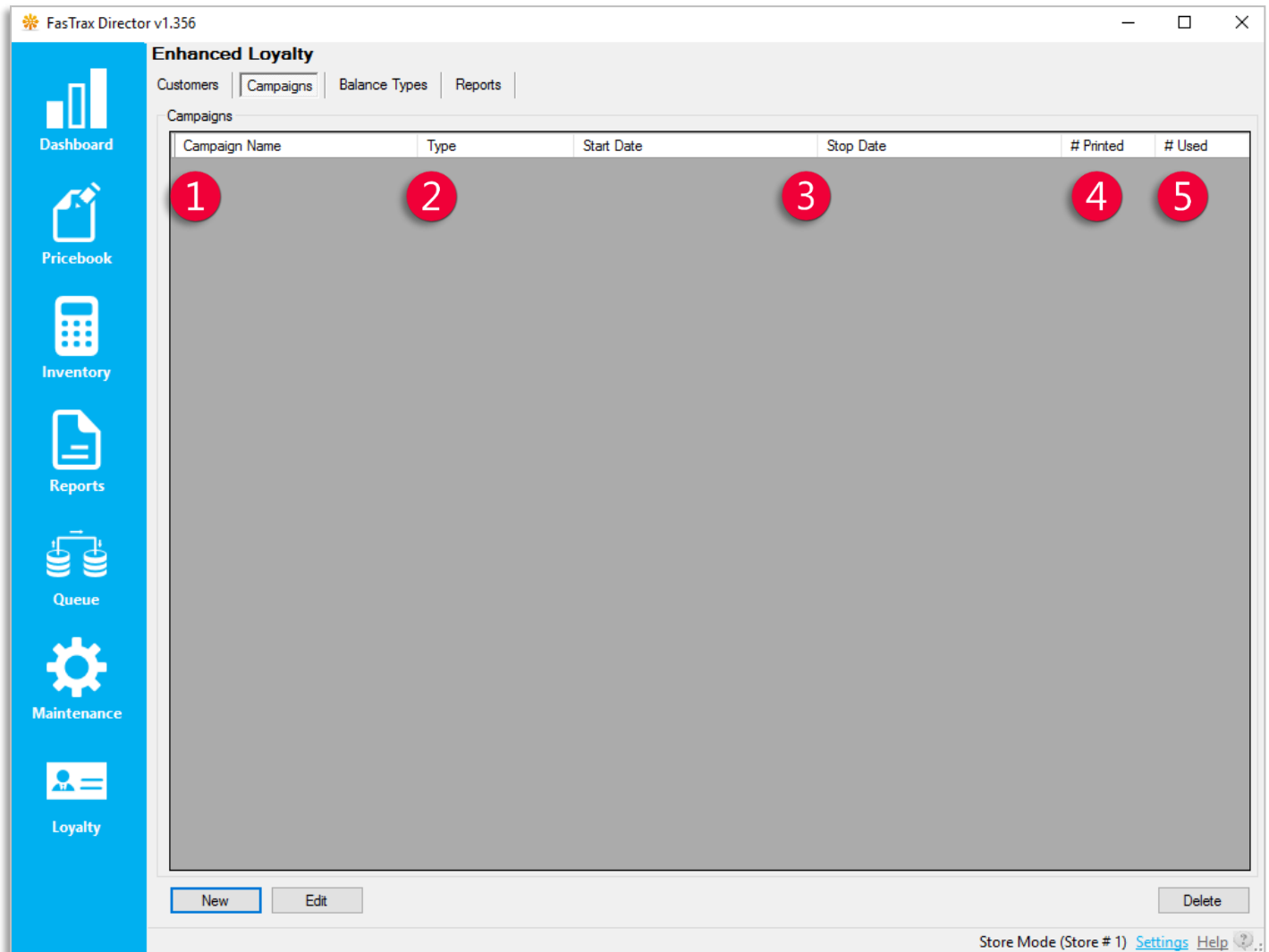
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Overview of Enhanced Loyalty

Enhanced Loyalty is a premium feature of FasTrax Solutions that can reward your customers for coming back to your store over and over again. It allows for the creation of any number of **Balance Types** to track and reward purchases in different areas of your store. Contact your Lifeline technical analyst or FasTrax sales representative for more information on activating Enhanced Loyalty at your store today!

Loyalty Campaigns are set up to trigger off of a particular **Balance Type** when a **Loyalty Customer** has purchased enough merchandise to raise their points balance past a set threshold.

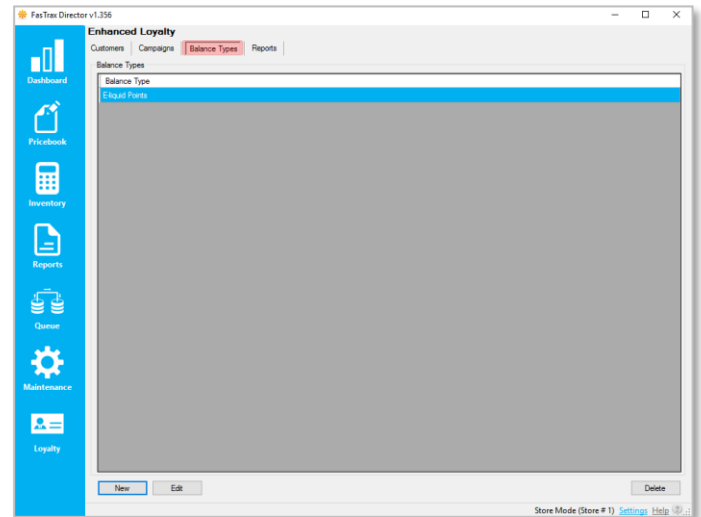
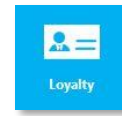


- 1 Campaign Name – the name of the Loyalty Campaign
- 2 Type – Shows the campaign type; Points per Item, Points per Dollar, or Manufacturer funded
- 3 Start Date/Stop Date – Shows the date range for which the loyalty campaign will be in effect
- 4 # Printed – The number of times any customer has reached the points threshold and had a coupon printed at the register
- 5 #Used – The number of times a printed coupon has been redeemed for a discount



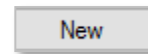
Creating a Balance Type

1. In **Director**, choose the **Loyalty** module.
2. Then, choose the **Balance Types** option from the menu ribbon.



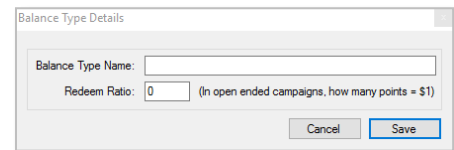
3. Choose the **New** button.

FasTraxPOS

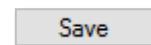


4. In the **Balance Type Details** section, enter a **Balance Type Name** and a **Redeem Ratio**.

Redeem Ratios are only used by **Open Ended Campaigns**. This is set by choosing the **Open Ended Trigger Type** when setting up your campaign.



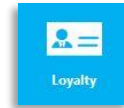
5. Choose **Save** when complete.





Creating Loyalty Campaigns

1. After logging into Director, choose the Loyalty module.



2. Select the Campaigns option from the menu ribbon



3. This will show you all campaigns you currently have in the system. Click the New button at the bottom left to open the Campaign Details Window.

The screenshot shows the 'Campaign Details' window with the following fields and callouts:

- 1: Name field (Example Campaign)
- 2: Start Date field (11/ 3/2016)
- 3: Campaign Type dropdown (Points Per Item)
- 4: Trigger Type dropdown (None)
- 5: Trigger Value field (0)
- 6: Filter Type dropdown (All Items)
- 7: Stores list (1 - Default Store)
- 8: Balance Type dropdown (Eliquid Points)
- 9: Cash Multiplier field (1.00)

- 1 Name and Start/End Dates – Give the campaign an identifier and an effective time frame
- 2 Campaign Type – Chooses whether points are accrued by items bought or dollars spent
- 3 Campaign Value – Value of the coupon to be printed when a points threshold is reached
- 4 Trigger Type – Chooses whether points earned will be automatically spent to print a coupon or if they will continually accrue until redeemed at the customer’s discretion
- 5 Trigger Value – The number of points required to print a coupon (not used for *Open Ended* campaigns)
- 6 Filter Type – Determines what items are qualified to add points to a customer’s balance
 - o Items can be included by *whitelist*, meaning that only selected items qualify or by *blacklist* meaning that everything qualifies except selected items.
- 7 Store Selection – Determines which stores will be affected by the campaign
- 8 Balance Type/Earn Limit – Chooses which existing balance type will be used for accruing and redeeming points, and chooses the maximum number of points that can be accrued
- 9 Cash/Non Cash Multiplier – determines if extra points will be given for using cash on a sale.



4. After the **Campaign Details** are filled out, click the **Coupon Details** link (only necessary if the **Trigger Type** is set to **Points Earned**)

Campaign Type: Points Per Item
Campaign Value: 1.00
Trigger Type: Points Earned

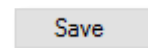
5. Enter in all **Coupon Details** in this window:
- **Header/Text fields** – Information to be printed on the coupon
 - **Expiration Type** – Determines how long the coupon will remain valid
 - **Filter Type** – Determines which items the coupon can apply to
 - **Limit to Once Per Sale** – Toggle on or off

Coupon Details

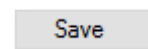
Header 1:
Header 2:
Header 3:
Text 1:
Text 2:
Text 3:
Text 4:
Text 5:
Expiration Type: Never Expires
Filter Type: All Items
 Limit To Once Per Sale

Cancel Save

6. Click the **Save** button to save the coupon data and exit back to the **Campaign Details**.



7. Finally, click the **Save** button on the **Campaign Details** screen to save the campaign and close the window.

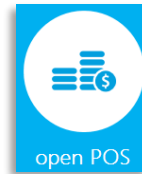


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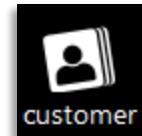


Adding Loyalty Customers through POS

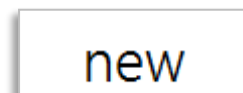
1. After logging into POS, select **Open POS**



2. Within the POS, click the **Customer** gem.



3. This will bring up the **Find Customer** screen. To add a new customer from here, click **New**.



4. On the **Customer Details** screen, add any data needed for the customer. When finished, click **Save**.

Pro Tip: If you have a 2D barcode scanner, you can scan the customer's **Driver's License** to enter their info automatically.

management | CUSTOMER DETAILS

first name: last name:

phone #: ok to text

email: ok to email

address:

city:

state: zip:

DOB: 12/ 2/2015 license #:

scannable ID:

notes:

For assistance with configurations, please contact Technical Support at Support@FasTraxPOS.com