

# customer rewards

Use this guide to create customized customer rewards and redeem points earned by customers.

## Setting Security

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Security button.
  - Customer Rewards – Edit
  - Ticket - Process
3. Click the Return to Previous Screen.

## Reward Setup

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Customer button.
3. From the Table to Edit field, click on Reward.
4. Click the Add button. Type in the name of your Reward, and then click the Add button.
5. In the 'Earn Rewards when the Customer' list, select from one of the following customer actions: Purchase Products; Purchase Services; Prebook the Services; or Books Services Online.
6. Select from the options available in the Category drop down list.
7. In the Item list: check the necessary items that must be purchased to earn points.
  - ❖ For multiple locations, check off each location you wish to use the reward.
8. To define the date range, in the Start Date field, enter the current date or a future date when the point system for the reward will begin; if the reward will expire, check the Use End Date checkbox; and, in the End Date field, enter the future date when customers will no longer receive points for the reward.
9. If desired, check the Use Point Range check box and set the Min (minimum) number of points a customer will earn and a Max (maximum) number of points a customer may earn on any single ticket.
  - ❖ Setting a point range restricts the points earned whether you select 'Use Points' or 'Use Levels' option.

Customer earns rewards when they (Purchase Services) in the Category (All Services by Category) in the List (Design, Hair Treatments). The reward starts on (4/1/2009) and ends on (4/1/2010). The reward has a total point range of (0) Min, and (0) Max. The reward is only available to members that have these Memberships (Customer Rewards). Each time a customer earns the reward they receive (10) points.

Customer earns rewards when they (Purchase Services) in the Category (All Services by Category) in the List (Body treatments: Massage, Body treatments: Wax treatment). The reward starts on (1/1/2010) and ends on (12/31/2011). Each time a customer earns the reward they receive (10) points. The reward is available at the selected locations.

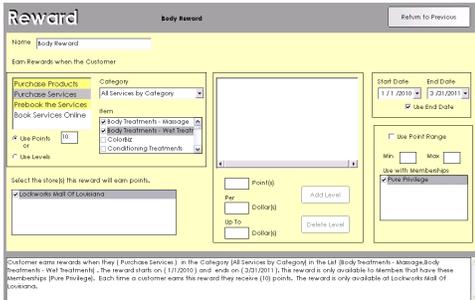
Customer earns rewards when they (Purchase Services) in the Category (All Services by Category) in the List (Body treatments: Massage). The reward starts on (4/1/2009) and ends on (7/31/2009). The reward has a self point range of (0) Min, and (0) Max. The reward is only available to members that have these Memberships (Customer Rewards). A level system is used to determine the points for the reward. The level one (1) point for each \$15 greater than \$0 and up to \$100 spent, 2 points for each \$10 greater than \$100 and up to \$500 spent, 3 points for each \$10 greater than \$500 and up to \$1000 spent, 4 points for each \$5 greater than \$100 and up to \$500 spent, 5 points for each \$5 greater than \$500 and up to \$1000.



10. In the Use with Memberships list, you can assign a membership group to a reward by checking one or more membership names. The customers belonging to the selected membership(s) will be eligible to receive points from this reward plan. All other customers will not be eligible to receive points.

- ❖ To apply a reward plan to all customers with a qualifying purchase, do not check a Membership checkbox.

- ❖ Since memberships are not shared across multiple locations, when you are creating a reward that does require a membership, you will receive an alert letting you know that the specific reward is only usable at the location where it was created.



Although you will be able to view the reward at all locations in your full list of Rewards, you will not be able to make any changes to a reward from a different location with a membership assigned.

11. To have customers earn a set number of points per purchase, select the Use Points option and enter a number in the Use Points text box.

12. To have customers earn more points for additional spending, select the Use Levels option and do the following:

- ❖ In the Point box, enter the number of points a customer will earn for each Per Dollar(s) spent.
- ❖ In the Per Dollar(s) box, enter the minimum number of dollars in whole dollars a customer must spend to receive the number of points entered in the Point field.
- ❖ In the Up to Dollar(s) box, enter the maximum amount of money in whole dollars a customer will spend and receive the number of points entered in the Point field.
- ❖ Click the Add Level button to add the level to the Levels list.
- ❖ Repeat these steps to define other levels.
- ❖ For the last level, in the Up to Dollar(s) box, enter the largest possible number such as \$999,999 to prevent customers from exceeding the highest level.

13. Click the Return to Previous button when you are finished.



**Customer Rewards**

**Information**

Name: Customer Rewards    Discount ID: Reward    Category: Customer

SalonBiz may discount items on the ticket by a percentage, set dollar amount entered or both dollar amount and percentage.

Discount Type: Dollar Amount (\$)    Amount: 0.00

Allow Usage: Entire Ticket Only

Usage on which items: Discount Anything

Commission: SalonBiz also allows you to set if you pay the staff commission for items discounted. A check indicates that you will pay commission on the full retail price regardless of the discount amount.

Pay Commission on Discount?    G/L Account:

Discount Used For Redeeming Customer Rewards:

**Default Settings**

**Ticket**

Answer Here: Customer Rewards    Save Answer

Questions	Answer
Prompt if user has a Open Gift Certificate	No
Require a customer on a Ticket?	For Service...
Require a Staff for Product sale on ticket?	Yes
Require a Staff for Return Item on ticket?	Yes
Require a Staff for Service sale on ticket?	Yes
Reward Points to dollars (1 point = ? Dollars)	0.05
Rewards discount	Customer R...
Show appointment note on the traveler?	Yes
Show customer note on the traveler?	Yes

Explanation of setting: Determines the discount for Rewards

Reset to Blueprint Default    Return to Previous Screen

## Redemption Setup

- From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
- Click on the Ticket button.
- From the Table to Edit field, click on Discount, and then click the Add button, and type in the name of a new discount type to use for customers to redeem points for example, Customer Rewards. Click the Add button.
  - Link the discount to Customer in the Category drop down menu.
  - In the Discount type field, select Dollar Amount and set the amount to zero in the Amount field.
  - Set the Allow Usage field to Entire Ticket Only.
  - The Usage on which items field can be set to your preference. If you are not restricting rewards, select Discount Anything. If you are planning on only offering rewards for products or services, select the appropriate usage type.
- Click the Return to Previous Screen button.
- From the Blueprints screen, click on the Ticket button.
- Click the Set Default Settings button.
- Select the 'Rewards discount' in the Questions field, and then from the Answer Here drop down list, select the name of the rewards discount you have just created and click the Save Answer button.
- Select the 'Reward Points to dollars (1point = ? Dollars)' question. In the Answer Here amount box, enter the monetary value of a point and click the Save Answer button.
- Select 'Print customer rewards on tickets' item, them from the Answer Here drop down list, select Yes and then click the Save Answer button.
- Click the Return to Previous Screen button.

First: Sally    Last: Smith    Balance: 0.00    Add    Numbers:    Status: Open

Customer Details

Qty	Item#	Item Nam	Price
1	Fac00	Facial 60	100.00

**Customer Rewards**

Customer: Sally Smith    Point Balance:    Guest Ticket:    Points Earned:    Exit

Date	Ticket Number	Reward Name	Points
8/22/2009	4	Facial Reward	2

Buttons: Add Product, Add Package, Add Service, Add Series, Cash, Check, Discover, Facial/MC, Gift, Store Credit, See More, Process Ticket, Void Ticket, New Ticket, Print Ticket

## Earning Points

- Upon processing a ticket with a qualifying item for earning a reward. You will automatically see the display of the Customer Rewards dialog box with the added reward listed along with the customer's accumulated rewards.
- Click the Exit button when finished.

**Address & Information**    Personal Info    Services    Formula    Riches    Custom Info

First Name: Sally    Staff

**Reward History**

Customer: Sally Smith    Point Balance:    Appoint Reward Balance:

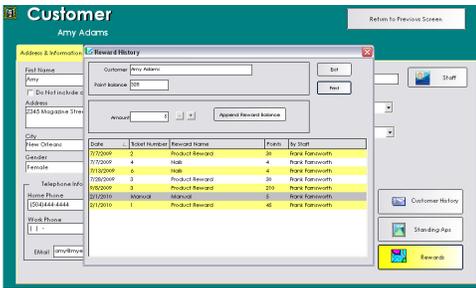
Date	Ticket Number	Reward Name	Points	By Staff
8/22/2009	4	Facial Reward	2	Unknown
8/23/2009	Manual	Manual	-2	Unknown
8/23/2009	4	Facial Reward	2	Unknown

Buttons: Customer History, Standing App, Rewards

## Viewing Points

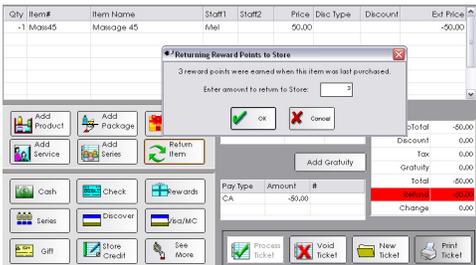
- From the individual customer information file, click on the Rewards button.
- View and/or print customer reward history.
- Click the Exit button when finished.





## Editing Points

1. From the individual customer information file click on the Rewards button.
2. Select the point balance to edit, enter the amount to edit in the Amount field. Use the +/- buttons to designate an increase or decrease of points.
  - Click the Append Reward Balance button when the desired amount appears in the amount field. You will see the appended amount immediately listed as a Manual ticket.
3. Click the Exit button when you are finished.



## Returning Points

1. Continue to process a ticket with a return item as usual. When you select the payment type, you will be presented with an option to return points earned.
2. Enter the points to return to the store and click the OK button.
3. If the customer used any points on the return item, you will be presented with an option to return those points back to the customer.



## Redeeming Points

1. When a customer is using available reward points as a payment on a ticket, double click in the Disc Ticket field to access the reward redemption screen.
2. Select the Customer Rewards discount type in the Select a Discount screen.
3. In the Reward Redemption screen, enter the monetary value of the points to use for the payment in the Reward Amount to Apply field.
  - Pressing the enter button on your keyboard will automatically calculate the amount. A reward amount that is less than the value of the total amount due on the ticket will only reduce the total amount equal to the monetary value of the reward.
4. Click the OK button.
5. Continue to process the ticket as usual.



# frequently asked questions

## **Can my customer's points expire?**

Customer's points will not expire with the current functionality.

## **Can I delete 'old' customer points?**

You can use the append functionality to alter the amount of any points earned.

## **What happens when I void a ticket?**

Voiding a ticket where points were earned will automatically reverse the points that were earned on the original ticket.

## **Can customers earn points on a discounted ticket?**

The customer rewards program looks at the actual ticket line item to award eligible items and amounts. If the line item is discounted, customers will earn points on the discounted line item. If the discount is placed on the entire ticket, the reward points will be given for the discounted value.

## **Will customers earn points if they pay with a gift certificate?**

Yes, since the rewards program looks at the ticket line item to award qualifying purchases any payment type can potentially award points. This is true even if the customer uses the Rewards discount type.

## **Does the system reverse points when a customer returns an item they previously earned points on?**

You have the option to return all or partial points earned on any returned item.

## **How much should my points be worth?**

The customer rewards program is so flexible you can customize it according to your needs. For example, if you set your rewards points to dollars value to \$.05 a customer will need to accumulate 500 points to earn a \$25 reward.

## **Will every customer be able to earn points?**

It is up to you how your rewards program functions. You can allow all customers to earn points on qualifying purchases in your system. You also have the ability to only allow customers with a membership to earn points on particular programs.

## **Can I offer special double-point days?**

You can set up rewards for a date range and single service or service category, if you want to create a special reward program with additional points you could set up one like you would normally and just double the points for that particular program.

