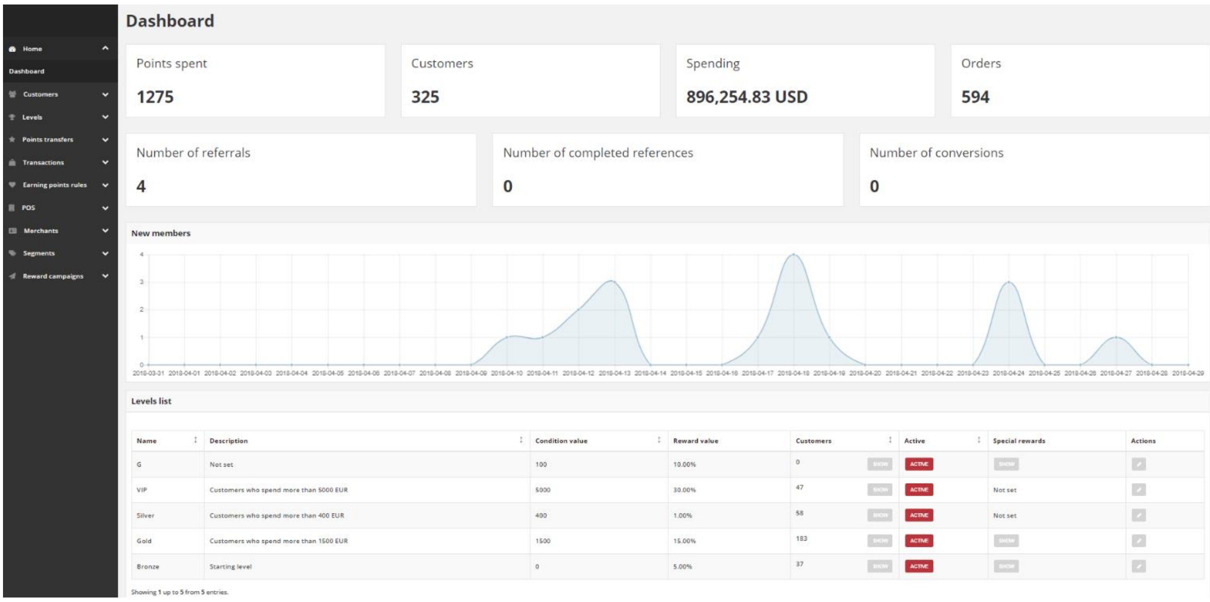
WELCOME TO THE OPEN LOYALTY PLATFORM!

Congratulations on your new Loyalty Platform. This manual is intended to help you get the most out of your Loyalty program in your day-to-day use.

This guide answers the “why, where, and how” questions that most users have when learning to use Open Loyalty platform. You’ll find lots of step-by-step instructions, screenshots and examples.

Revel Systems offers businesses the ability to customize their loyalty and rewards programs. This feature gives businesses the power to create engaging programs that generate customer loyalty and increase sales. Through this Platform, you can easily manage the rewards and loyalty points to be provided to your customers. Thereafter, the customers can earn or redeem the points as per the rules defined by you.



Open Loyalty Platform

GETTING STARTED

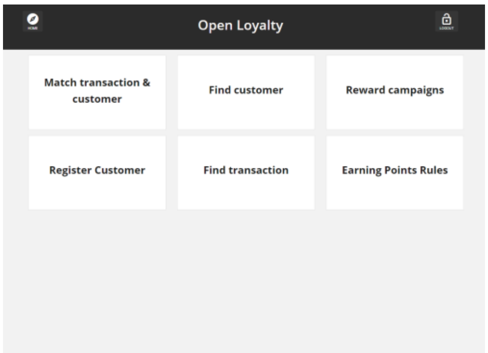
This section of the guide introduces your Loyalty Platform Admin, and walks you through the basic configuration settings. You'll get an overview of the resources that are available to you as an Admin of the Open Loyalty and how to log into your Admin account. Finally, you'll learn the concepts of loyalty platform and configuration scope, and establish best practices for project standards and requirements.

CHAPTER 1:

WELCOME

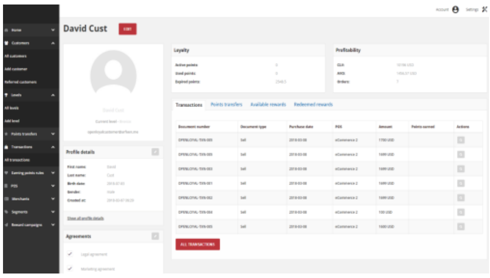
An Open Loyalty is technology for loyalty solutions. It's a loyalty platform in open source, with ready-to-use gamification and loyalty features, easy to set up and customize, ready to work on-line and off-line. Open Loyalty is an open source solution that can be easily **integrate with eCommerce** or can be used as a **standalone solution**.

There is variety of applications for Open Loyalty. Based on it you can build loyalty solutions like: loyalty modules for eCommerce, full loyalty programs for off-line and on-line, motivational programs for sales department or customer care programs with mobile application.



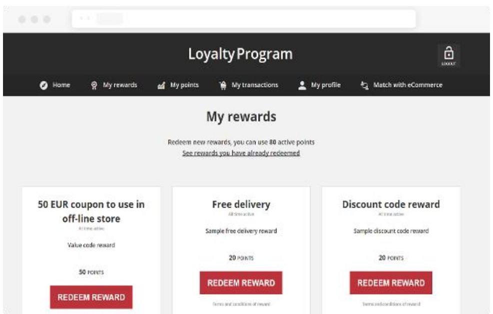
POS COCKPIT

Use the POS Cockpit and run your loyalty app in your off-line stores



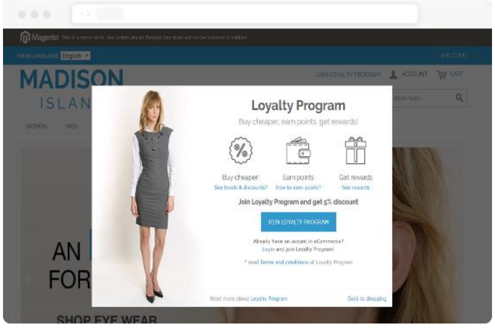
ADMIN COCKPIT

Use the Admin Cockpit to manage your loyalty application



CLIENT COCKPIT

Use the Client Cockpit and create a dedicated web portal for your customers



E-COMMERCE COCKPIT

New additional loyalty and gamification features as a seamless part of your webshop

API & CONNECTORS

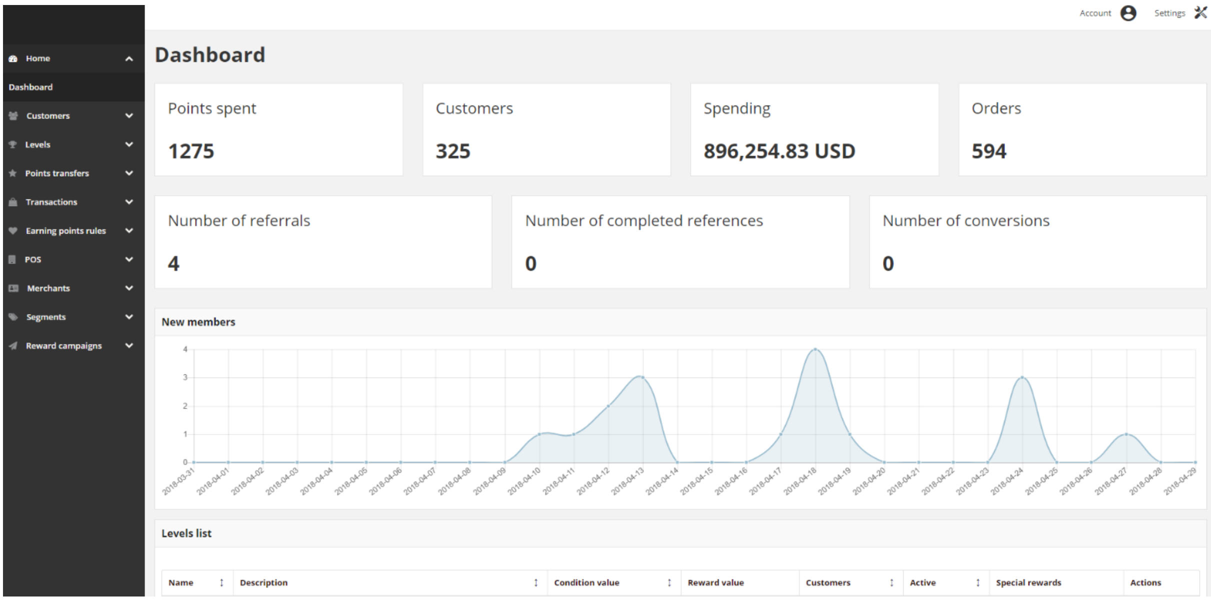
Connect Open Loyalty to eCommerce platforms, ERP systems, mobile applications, or any external system

CHAPTER 2:

OPEN LOYALTY ADMIN

Your store Admin is the password-protected back office where you can set up points rule, reward campaigns, manage customers, and perform other administrative tasks. All basic configuration tasks and loyalty campaign management operations are performed from the Admin.

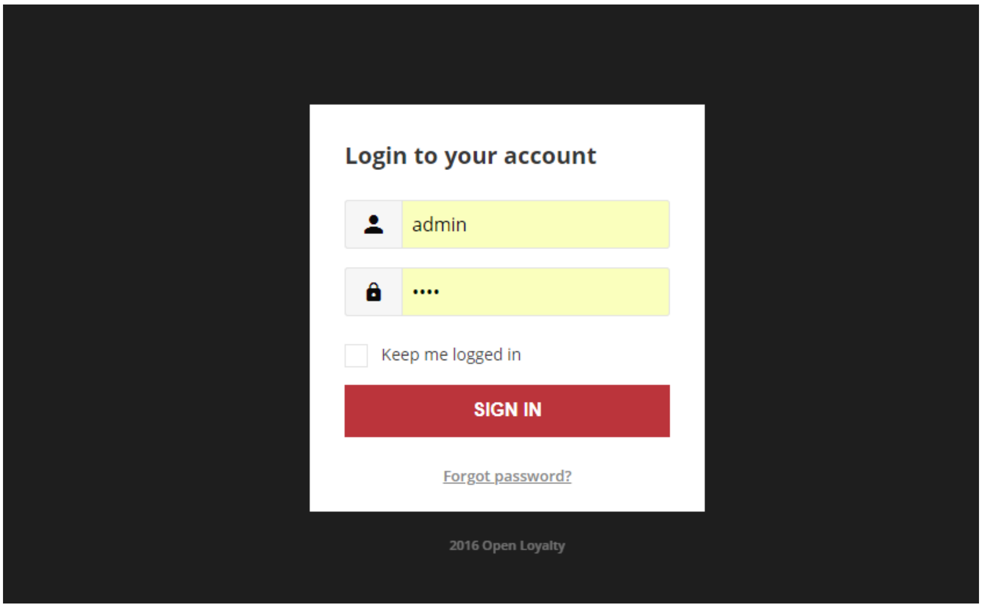
Your initial sign-in credentials were set up during the Open Loyalty installation. If you forget your password, a temporary password can be sent to the email address that is associated with the account



Admin Sidebar and Dashboard

Admin Sign In

The first thing you will learn is how to sign in and out of the Admin, and to reset your password. All of the instructions in the rest of this guide are written for a user with full administrative privileges, and begin with the assumption that you are logged in to the Admin.



Admin Sign In

To sign in to the Admin:

1. In the address bar of your browser, enter the URL that was specified during the installation, followed by the base URL of your store's Admin.
   The default Admin URLs look something like this:

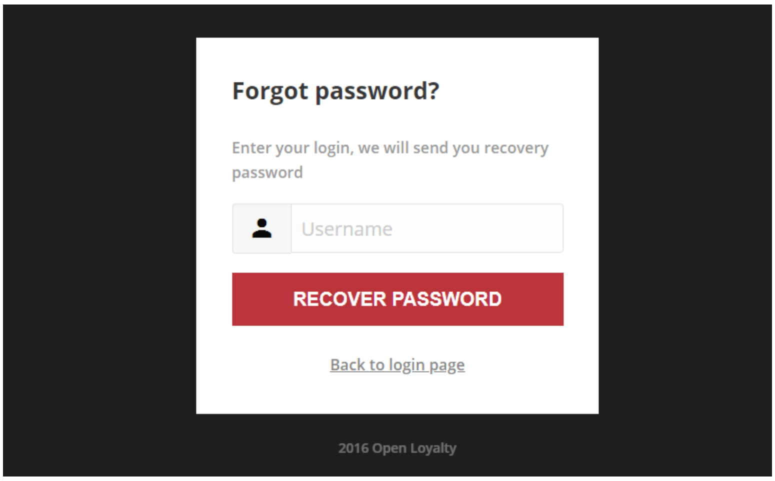
http://www.domain.com/admin

   You can bookmark the page or save a shortcut on your desktop for easy access.

2. Enter your Admin **Login** and **Password**
3. If you want to log in automatically every time you open the website without needing to enter your login and password mark **Keep me logged in** checkbox.
4. Tap **Sign in**

To reset your password:

1. If you forget your password, click the **Forgot password?** Link



Forgot Password

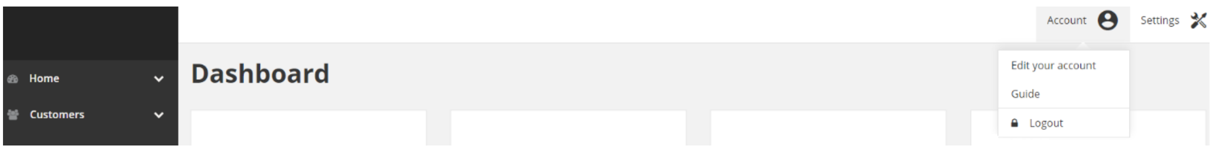
2. Enter the Email Address that is associated with the Admin account
3. Tap **Recover Password**

   If an account is associated with the email address, an email with recovery password will be sent to reset your password.

Your Admin password must be eight or more characters long, and contains at least one upper case letters, one numeric character and one special character

To sign out of the Admin:

In the upper-right corner, tab the **Account** ( ) icon. Then on the menu, choose **Logout.**



Logout

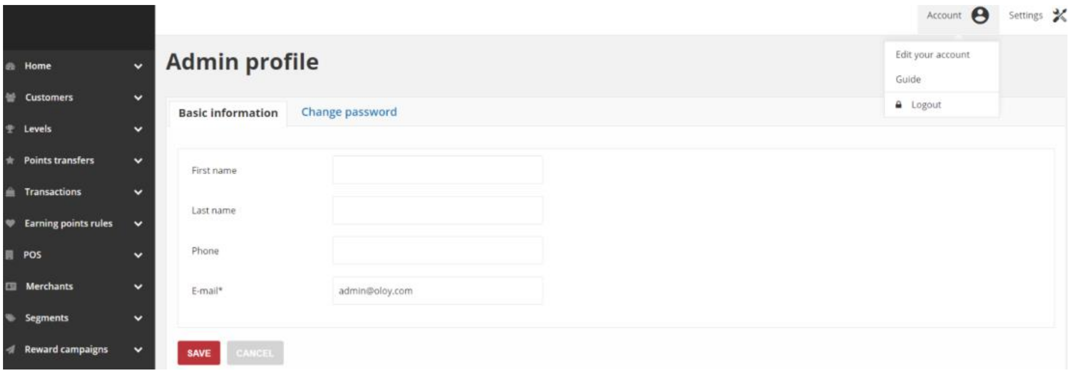
When you logout, the Sign-In page returns.

Your Admin Account

Your Admin account was initially set up during the installation. You can personalize your user name and password, and update your first and last name, and email address and phone number at any time.

To edit your account information:

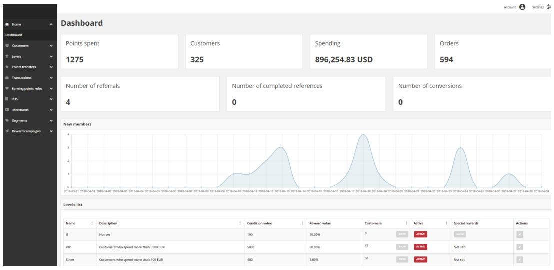
1. In the In the upper-right corner, tab the **Account** ( ) icon. Then on the menu, choose **Edit your account**
2. Make any necessary changes to your profile information. If you change your password, make sure to write it down.
3. When complete, tap **Save**



Admin Profile Information

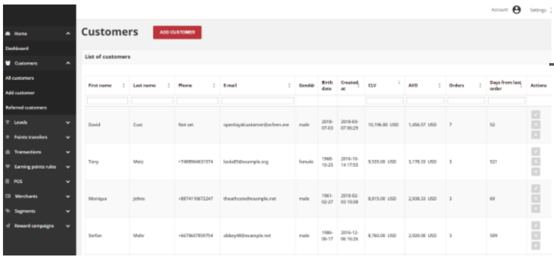
Admin Sidebar

The sidebar on the left is the main menu for your Loyalty Platform Admin, and is designed for both desktop and mobile devices. The menu provides access to all the tools you need to manage your loyalty programs on a daily basis.



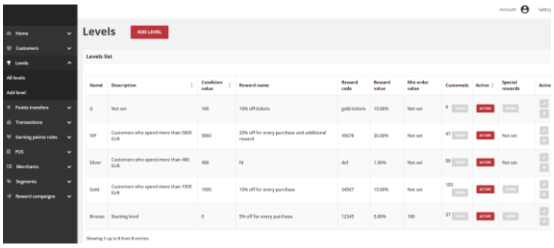
Dashboard

The Dashboard provides a quick overview of the customers activity in your loyalty programs, and is usually the first page that appears when you log in to the Admin



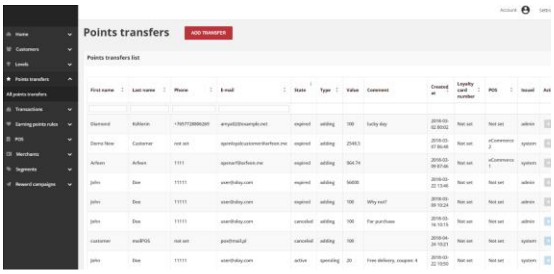
Customers

The Customers menu is where you can manage customer registered in your loyalty programs, and see referred customers list



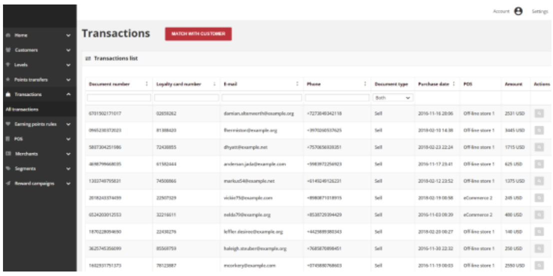
Levels

The levels menu is where you manage and define Customer levels with discounts and rewards.



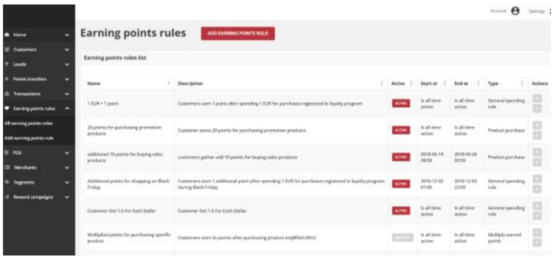
Points Transfers

The Points Transfer menu includes tools to controls everything related to your points transfer operation



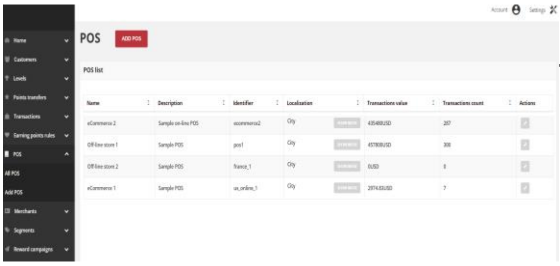
Transactions

The Transaction menu provides an overview of all data on offline and online transactions registered on customers



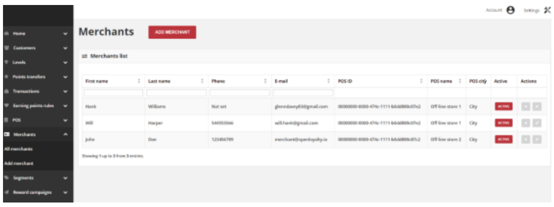
Earning Points Rules

The Earning Points Rules menu is where you set up rules for earning points based on transactions and behavior of Customers



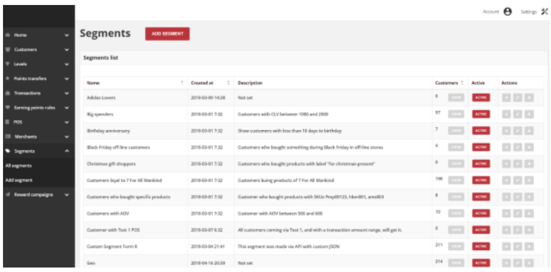
POS

The POS menu controls data related to your online and offline stores including localization and customers transaction values that were processed in POS.



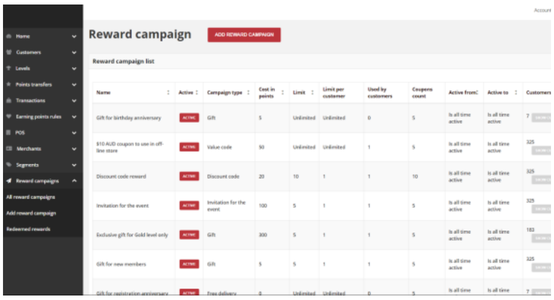
Merchants

The Merchants menu is where you can manage merchants and assigned them to particular POS.



Segments

The Segments menu is where you create customer segments based on customer transactions or behavior

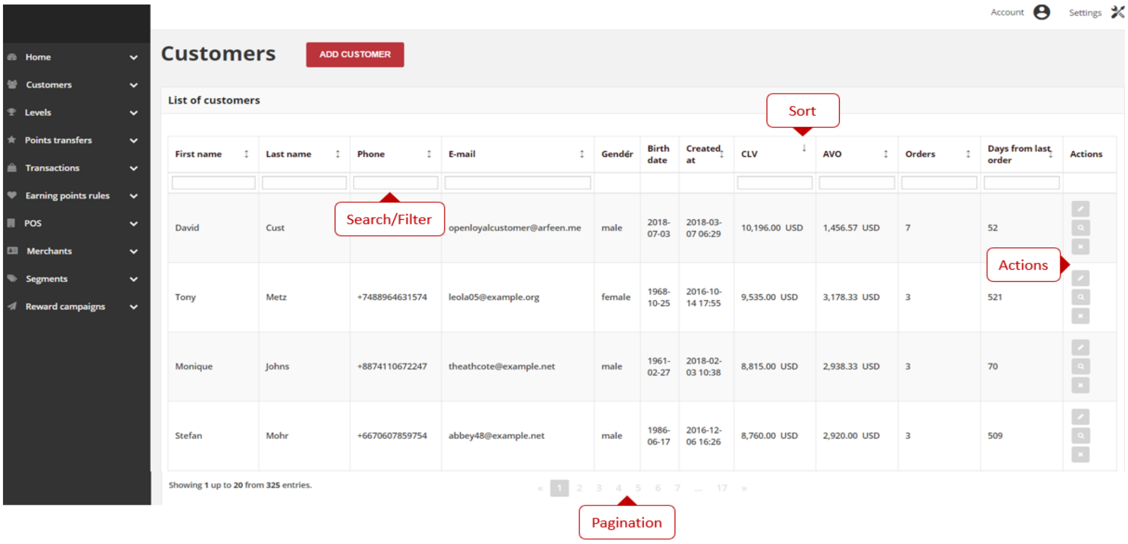


Reward Campaigns

The Reward Campaign menu is where you manage rewards available in your loyalty application, decide who can redeem rewards, and when

Admin Workspace

The Admin workspace provides access to all the tools, data, and content that you need to run your loyalty platform. The main pages have a grid that lists the data for the section, with a set of tools to search, sort, filter, select, and apply actions.



Admin Workspace

Workspace Controls

CONTROL	DESCRIPTION
Search / Filter	The filters in the header of each column can be used to limit the list to specific values. You can simply type the value you want to find and press Enter
Sort	The header of each column can be used to sort the list in ascending or descending order
Paginate	The pagination controls are used to view the additional pages of results
Actions	The Actions control applies an operation to selected record

Dashboard

The dashboard is the default startup page for the Admin – the first page that appears when you log in to the Admin. Dashboard gives an overview of the customers activity in your loyalty programs.

The blocks at the top of the page provide a snapshot of:

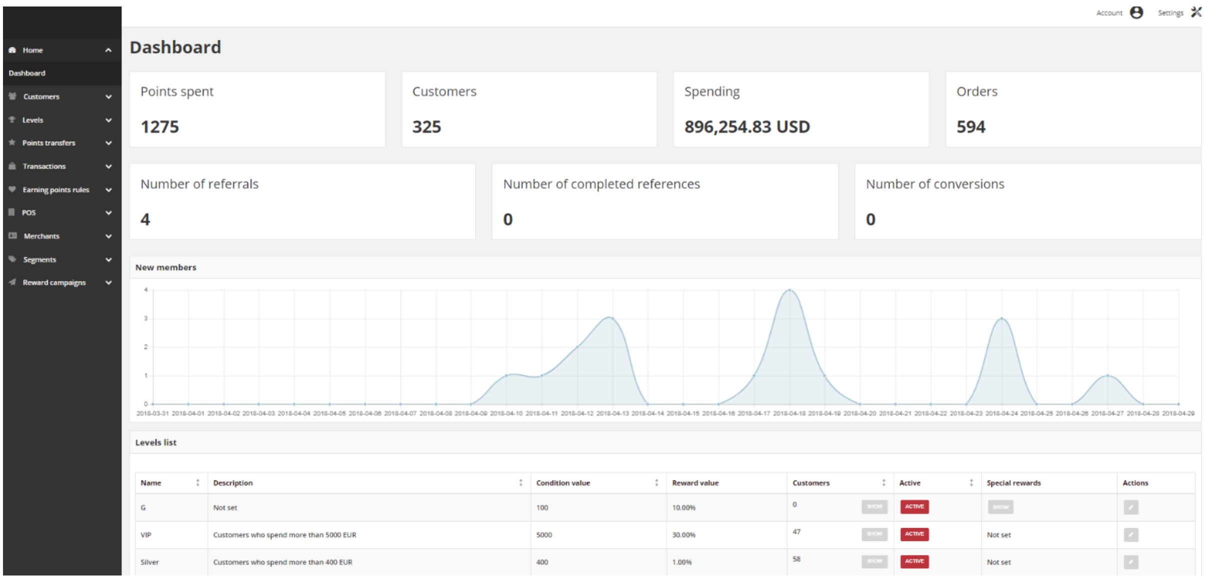
- Number of all spent points
- Number of all customer accounts
- Total amount of all registered transaction
- Number of all registered transactions

Blocks below, show some factors describing current state of referral program:

- Number of all invitations send by customers
- Number of all customers that register an account from invitation link
- Number of all customers that make purchase after register an account from invitation link

The chart shows the number of new customer accounts in time line. You can view the amount of member by hover your mouse over any day.

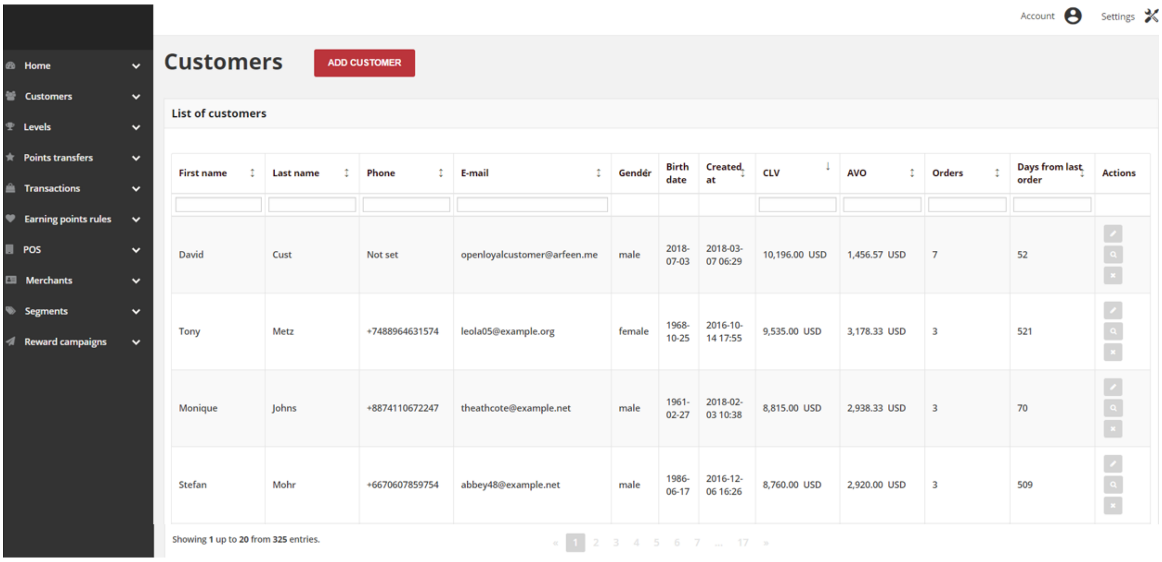
The tabs at the bottom provide quick overview of your Customer Levels list, associated to various benefits such as discounted fees and credentials for customer to reach this value. To learn more about customer Levels, see **Levels**



Dashboard

Grid Controls

Admin pages that manage data display a collection of records in a grid. The controls at the top of each column can be used to sort the data. The current sort order is indicated by an ascending or descending arrow in the column header. The Action column lists operations that can be applied to an individual record.



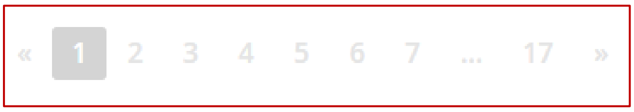
Customer Grid

To sort the list:

1. Tap any column header. The arrow indicates the current order as either ascending or descending.
2. Use the pagination controls to view additional pages in the collection.

To paginate the list:

1. Tap **Next** and **Previous** to page through the list, or click a specific **Page Number**.

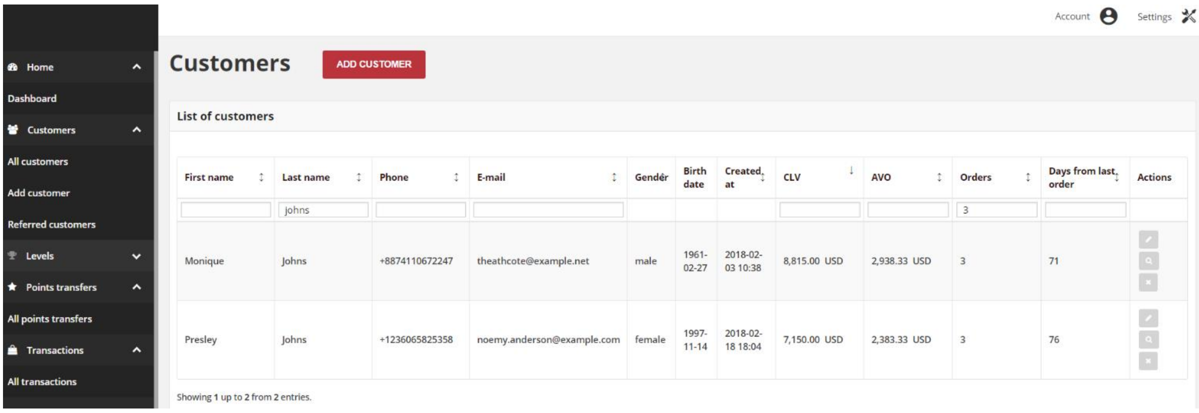


Pagination options

To search the list:

1. In the selected column in the field under column header type the value you want to find
   - To find a close match, enter the few letters/signs of what you want to find
   - To find an exact match, enter the exact word/number you want to find.

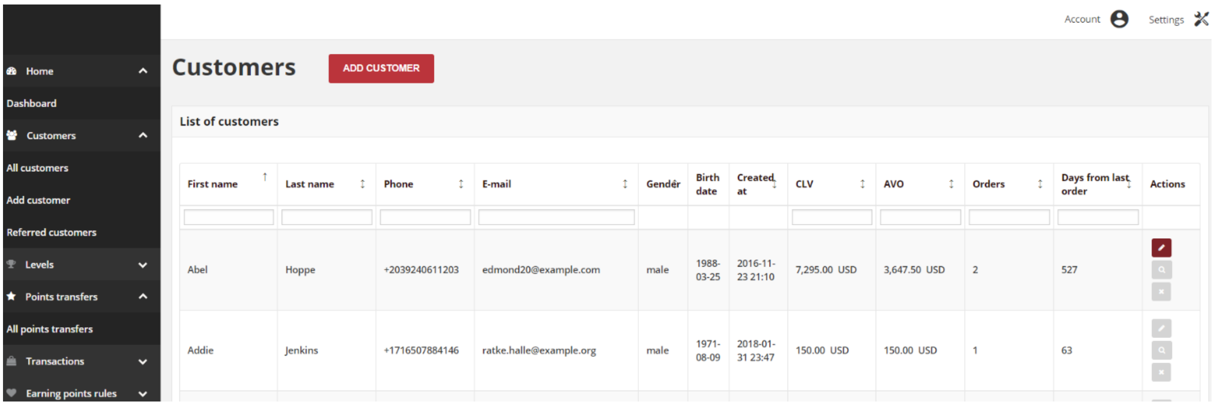
2. You can put as many values under different columns headers as needed to describe the conditions that must be met for the search result. Search values from each column create an AND Condition rule. It means that in search results only records matching all entered values are displayed.



Customer search controls

Actions Controls

When working with a collection of records in the grid, you can use the **Actions** control to apply an operation to the records. The Actions control lists each operation that is available for the specific type of data. For example, for Customer records, you can use the Actions control to edit basic information of selected customer, view the customer account form, or to deactivate record without possibility to activate them again.



Applying an Action to selected record

Actions by Grid

MENU	LIST	ACTIONS
CUSTOMERS		
	All Customers	Edit customer View Customer Account form Deactivate customer
LEVELS		
	All Levels	Edit level Export customer to CSV
POINTS TRANSFER		
	All points transfers	Delete transfer
TRANSACTIONS		
	All transactions	View Transaction details
EARNING POINTS RULE		
	All earning points rule	View earning rule details Edit points rule
POS		
	All POS	

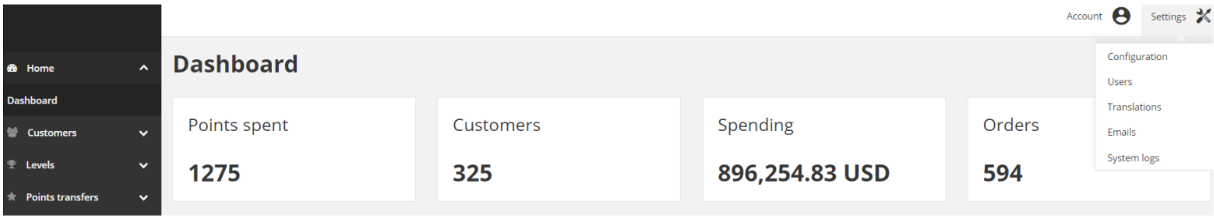
		Edit POS
MERCHANTS		
	All merchants	Remove merchant account Edit Merchant
SEGMENTS		
	All segments	Delete selected segment Edit segment Export customer to CSV
REWARD CAMPAIGNS		
	All reward campaigns	Edit reward campaign View campaign details

CHAPTER 3:

OPEN LOYALTY SETTINGS

The high level settings for the Admin management of your Loyalty Platform includes five areas that can be configured to enable and customize your activity.

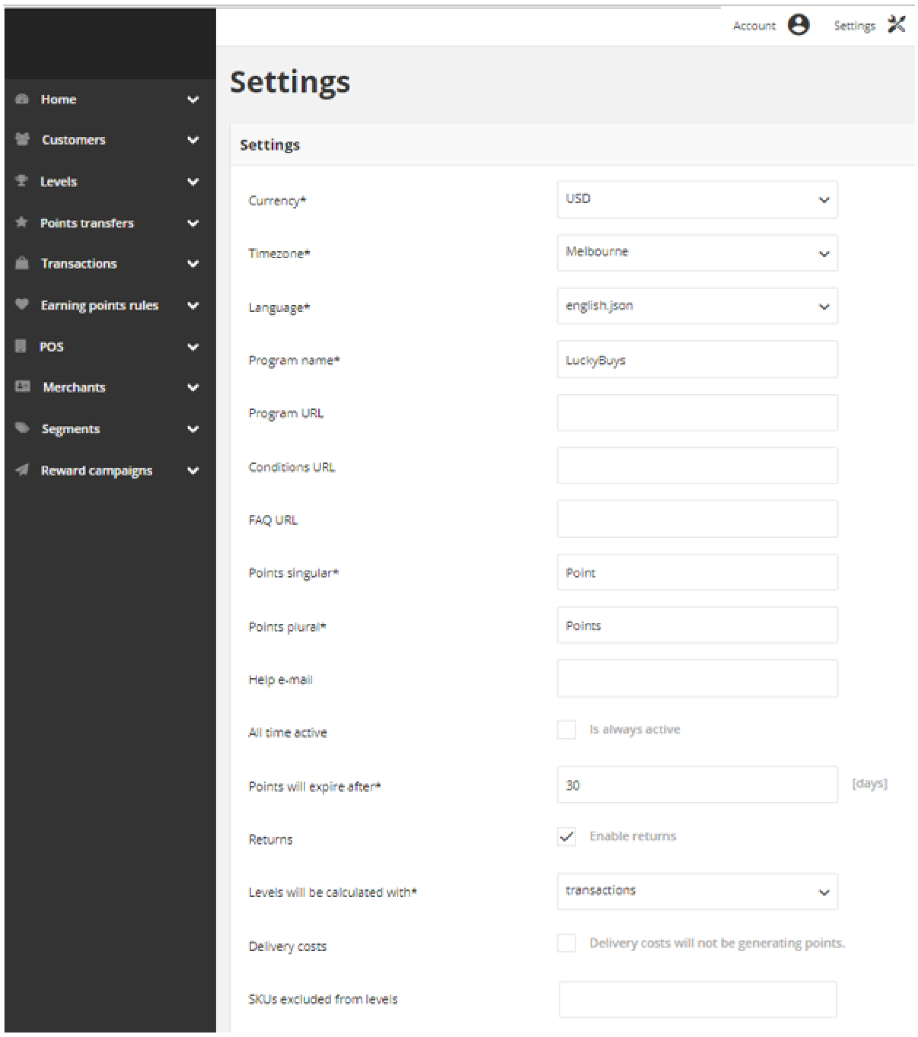
- **Configuration** - basic settings of loyalty platforms elements including loyalty programs behavior
- **Users** - detailed information about Open Loyalty users and theirs account settings
- **Translations** - available languages list with the editing possibility
- **Emails** - events list that send email from Open Loyalty system and theirs preview.
- **System logs** - informational, error and warning events list related to the Open Loyalty system



Open Loyalty Settings

Configuration

The Configuration section determines loyalty program and points details, customer earning and spending statuses, account activation, identification factors of matching transaction with customer and other settings that are used throughout the Open Loyalty system.



Open Loyalty Settings

To configure Open Loyalty:

1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Configuration**
2. In the **Settings** section, do the following:
   a. In the **Currency** list, select the currency that you use for online and offline transaction
   b. Select your **Timezone** from the list. Time zone is used for date time calculation

c. In the **Language list**, select Language that you use throughout the Open Loyalty

d. Enter the **Program name** that you want to use in all communications

e. If applicable, enter the URLs to the following:

Program URL	URL to page with Loyalty Program description
Conditions URL	URL to page with Loyalty Program Terms & Conditions description in pdf, accessible to download from the customer login page. that will be also attached as a link in the Welcome system e-mails footer. For more information please see **system Emails**
FAQ URL	URL to page with Loyalty Program FAQ page

f. In **Points singular** and **Points plural**, type a unit label of scoring in singular and plural, that you want to appear. For example: Point, Points

g. Set **Help e-mail**, where customer can write to find help and support for you Loyalty Program.

h. Mark the **All time active** checkbox, if you want the points accumulated by the participants of your loyalty program don't expire.

i. **Points will expire after** field is available and required only when **All time active checkbox** is unselected. Points will expire after provided number of days from date of adding Point transfer.

j. If you marked **Enable returns** checkbox, then after Return process completed amount of points earned for returned transaction will be subtracted.

k. Set the **Levels will be calculated with** field to one of the following:

Points	current level assignment will be calculated on the basis of sum of points earned from transactions (with use of earning rules)
Transactions	current level assignment will be calculated on the basis of the summary value of all transactions

l. When **Delivery costs** checkbox is selected then delivery cost will not be included in order value used for earned points calculation.

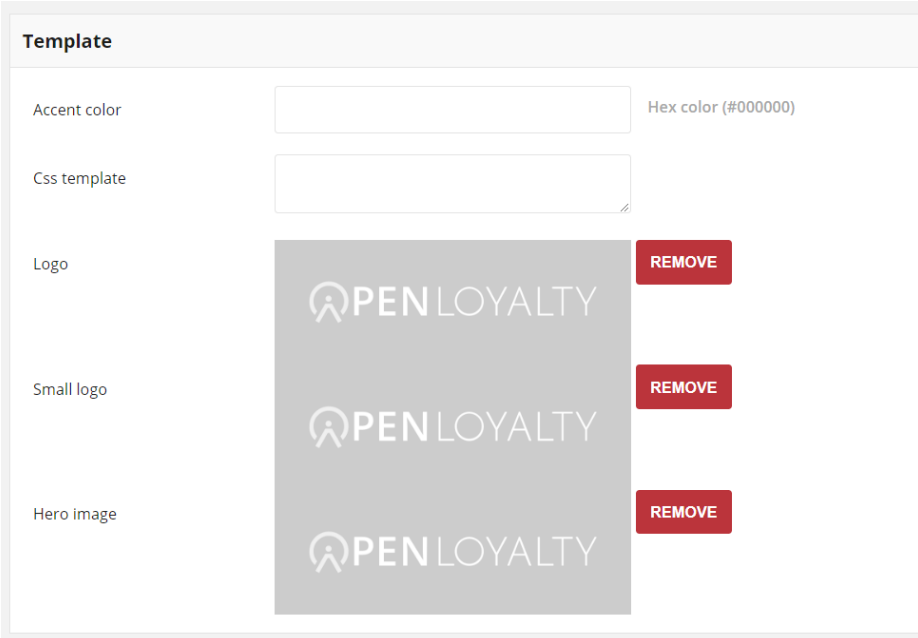
m. **Excluded SKUs of delivery cost** field is available and required only when **Delivery costs** checkbox is selected. SKU's provided in this field will be excluded from calculation of earned points.

n. In the **SKUs excluded from levels** enter SKUs that will not be included in order value used for earned points calculation.

3. When complete, tap **Save**

Template management

Template management determines the logo, as well as the other content elements e.g. fonts, headers, colors, that are used for all pages within Open Loyalty.

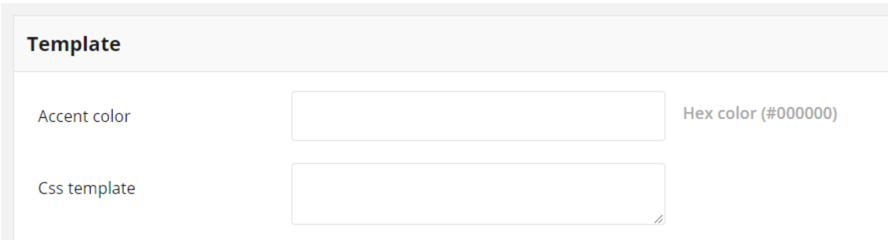


Template

The content is formatted with CSS, and can be easily edited and customizes by adding variables and other content element. You can make a color theme on the frontend using your primary color (Accent color).

To customize your template:

1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Configuration**
2. Scroll down to **Template** section and do the following:



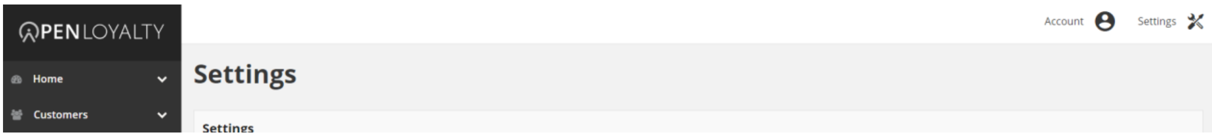
Content management

   a. In **Accent color**, define your primary color indicator. Accent color is the color displayed most frequently across your Loyalty Program screens and components. Only Hexadecimal color values are supported.

b. In the **CSS template** box, enter the CSS code as needed. The content consists of a combination of CSS directives, variables and text.

One of the first things you'll want to do is to change the logo in the header above the menu. Your logo can be saved as either a **PNG, JPG, or JPEG** file type, and uploaded from the Admin of your Open Loyalty. The default Open Loyalty logo in the sample data is an PNG file.

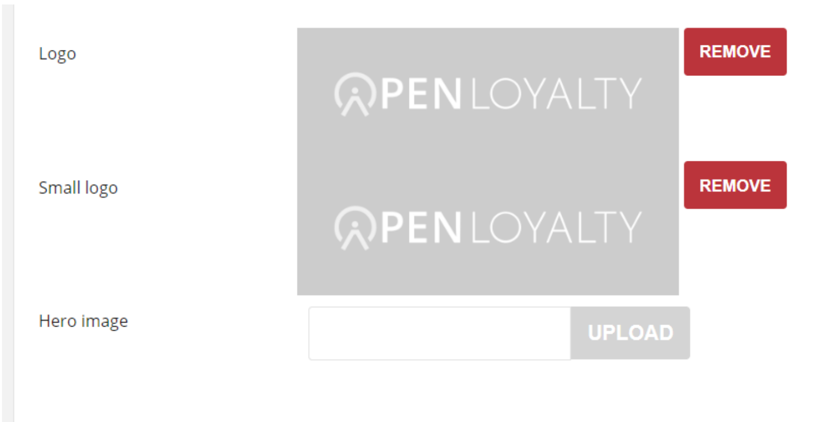
In addition, you can also add an oversized banner image, called **Hero image**, that will be placed on a login page. Hero image is the first visual element a customer's encounters on your site.



Logo in Header Menu

To upload your logo:

1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Configuration**
2. Scroll down to **Template** section and tap **Upload** on selected fields to do the following:



Logo Updating

a. In **Logo** field, to import logo image that will be displayed on desktop version. Then choose the file from your computer.

b. In **Small logo** field, to import logo image that will be displayed on mobile version. Then choose the file from your computer.

c. In **Hero image** field, to import image that will be displayed as a banner on login page.

3. When complete, tap **Save**

You can simply remove uploaded logo by taping **Remove**

Image Roles

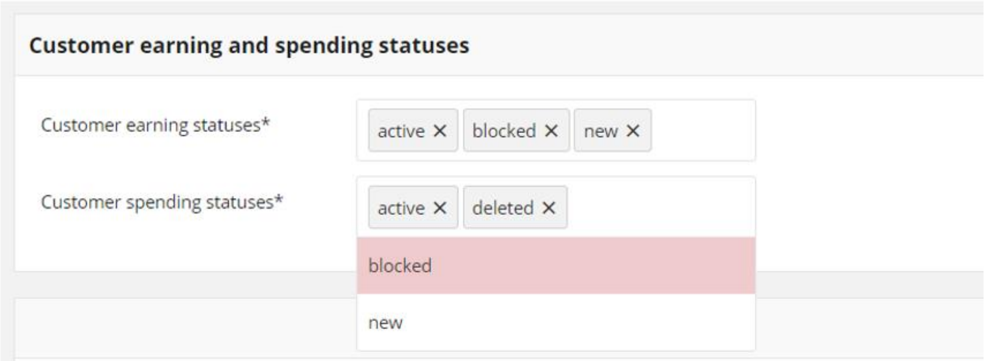
FIELD	DESCRIPTION
Logo	Main logo image in the Admin cockpit placed in the header above the menu. Image is display on desktop version of application.
Small logo	Small logo image in the Admin cockpit placed in the header above the menu. Small image is display on mobile version of application
Hero image	Large web banner image placed on a login page in the front. Hero image is the first visual element a customer's encounters on the site and display on mobile and desktop version.

Images sizing and formats

- The minimum and maximum image width is between 200-2560 pixels
- The minimum and maximum image height is between 200 – 1440 pixels
- The size of any one image must not exceed 2 MB
- Supported image formats: JPEG, JPG, PNG

Customer statuses

The Customer statuses section allows to specify to which customers with particular status, points transfer can be handled. Specify the customer statuses which determines adding and subtracting loyalty points.



Customer Statuses

To assigned a status:

1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Configuration**
2. Scroll down to **Customer earning and spending** statuses section.
3. Set the **Customer earning statuses** field to one of the following:

New	Customer create an account in your Loyalty Program, but didn't activate it. To learn more about account activation, see: **Account activation**
Active	Customer create and activate an account in your Loyalty Program
Blocked	Customer is temporary inactive
Deleted	Customer has been removed

If the **Customer earning statuses** field remain blank, i.e. no status will be assigned, loyalty points will not be charged to any Customer.

4. Set the **Customer spending statuses** field to one of the following

New	Customer create an account in your Loyalty Program, but didn't activate it. Customer is displaying in Customer grid from the Admin cockpit as a grayed-out. To learn more about account activation, see: **Account activation**
Active	Customer create and activate an account in your Loyalty Program. Customer is displaying in Customer grid from the Admin cockpit.

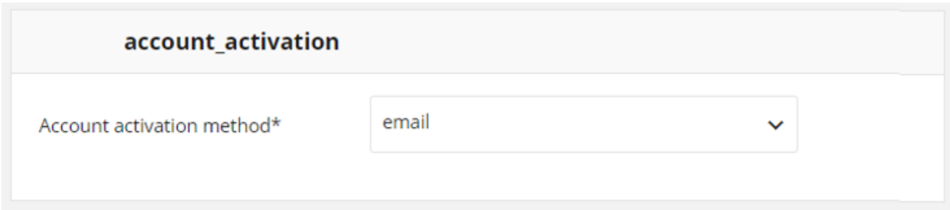
Blocked	Customer is temporary inactive
Deleted	Customer has been removed

If the **Customer spending statuses** field remain blank, i.e. no status will be assigned, any customer will be able to spend loyalty points.

5. When complete, tap **Save**

Account activation

In order to use Open Loyalty Client cockpit, your customers must first activate their customer account. In Account activation section you set the method how their accounts will be activated – by clicking link in welcome email or by code received via SMS.



Account Activation Method

To set up account activation method:

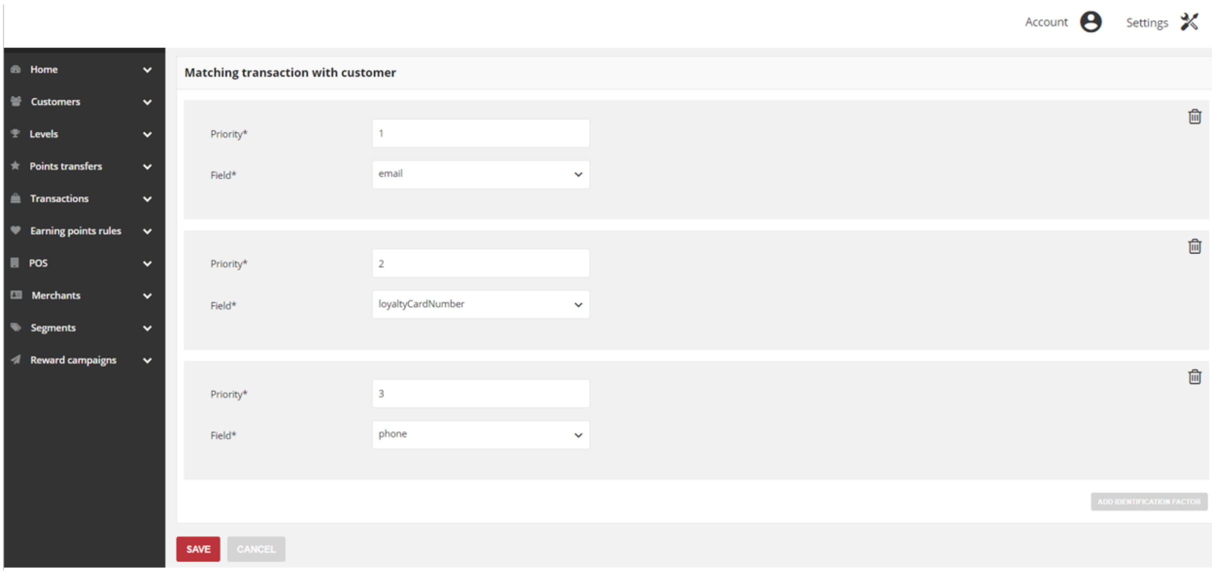
1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Configuration**
2. Scroll down to **Account activation** section.
3. Set the **Account activation method** field to one of the following:

email	account will be activated after clicking on activation link sent to email address
SMS	account will be activated after entering a verification code sent to phone number. The Verification PIN is valid for 30 minutes

4. When complete, tap **Save**

Identification factors

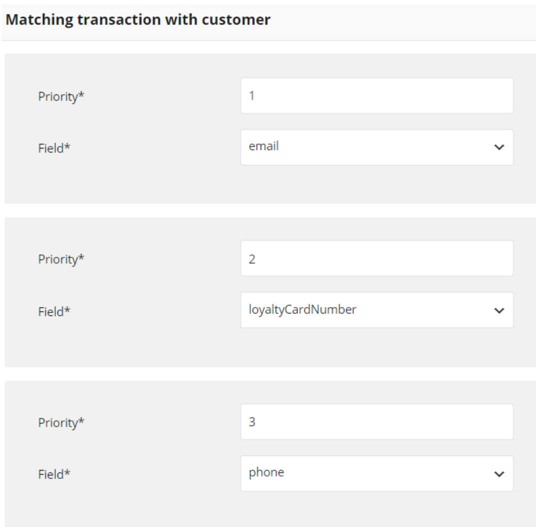
The identification factors determines the priority of factors used to match particular transaction with particular customer. Otherwise, these information are used to assign your loyalty program participant with transaction they making and transmitting relevant transaction data to Open Loyalty for completing or validating redemption-related transactions or rewards, calculating associated rewards or identifying transaction matches.



Identification factors

To set up identification:

1. In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Configuration**
2. Scroll down to **Matching transaction with customer** section. Fields in this section are used to prioritize which of factors will be taken first to calculate transaction to customer assignment.



Matching Factors with Priority

3. The **Priority** field determines the order in which the calculation will be handled. Enter a number to determine the Priority of this factor in relation to other factors that might be active at the same time (number 1 has the highest priority)

   For example, if there are three factors, with a priority of one, two, and three, the one with the highest priority (number one) is calculated before the others. If there will be no clear result, factor with the second highest priority is verified etc.

4. Set the **Field** to one of the following:

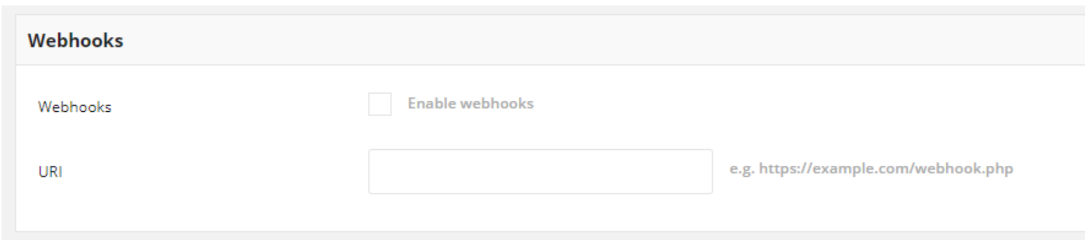
email	when matching transaction with the Customer email will be used (e.g. email provided in Loyalty Program and eCommerce must be the same)
loyalty card number	when matching transaction with the Customer loyalty card number will be used (e.g. Loyalty Card Number must be added to eCommerce account)
phone	when matching transaction with the Customer phone number will be used (e.g. phone number must be provided during account in Loyalty Program creation)

5. You can simply remove factor rule by clicking bin ( ) icon in a particular row.
6. When complete, tap **Save**

Webhooks

Webhooks is a mechanism allowing to send HTTP requests to the URL configured by Admin, triggered by some event, such us customer registration, transaction created, customer data edit etc. There is no need to be a request initiated on your end, data is sent whenever there's new data available.

To setup a webhook all you have to do is register a URL with the company proving the service you're requesting data from. That URL will accept data and can activate a workflow to turn the data into something useful.



Webhooks Enable Option

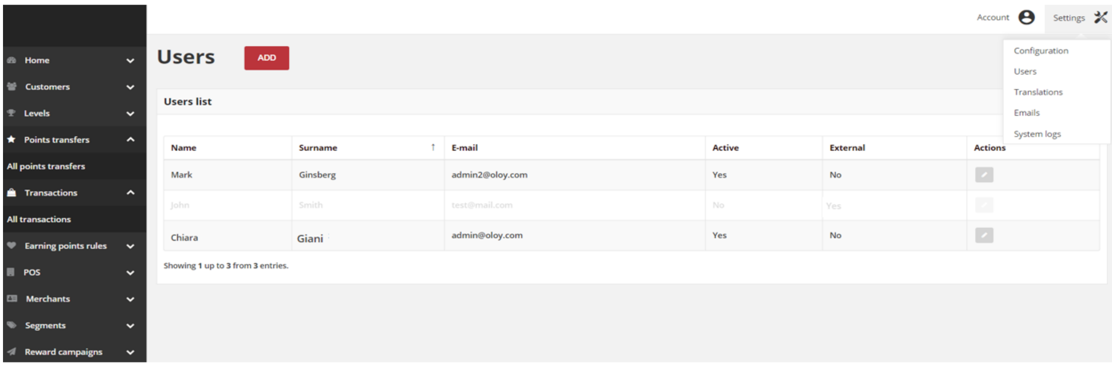
To enable Webhook:

1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Configuration**
2. Scroll down to **Webhooks** section, and to enable mechanism do the following:
   a. In **Webhooks** field mark ***Enable webhooks*** checkbox
   b. Enter configured **URL** address on which request will be sent
3. When complete, tap **Save**

Users

When your store is first set up, you receive a set of login credentials for the Administrator role that has full permissions. If there are others on your team, or service providers who need access, you can create a separate user account for each from this section.

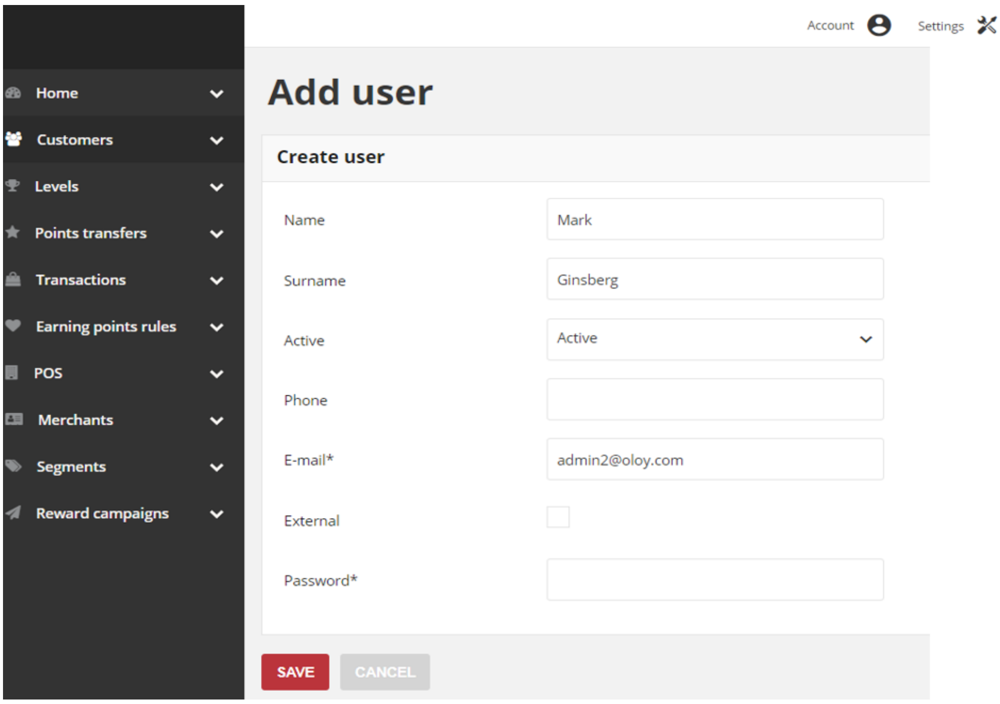
Users list include both active and inactive Admin user's – inactive are grayed-out. You can also see their status in Active column. Additionally Users list grid provides basic information about users – name, surname, email address and authenticate method.



All Users

To add new user:

1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Users.**
2. To add new user, tap **Add**



New User Account Information

3. In the **Create user** section, complete the following information:

- Name
- Surname
- Phone
- E-mail

This email address must be different from the one that is associated with your original Admin account.

4. Then you have to decide which of following user authenticate method to choose:

a. To authenticate user via an API key, do the following:

- Mark checkbox **External**
- Enter an **API key**, received from Open Loyalty provider

In this case, you will authenticate the user and store that authentication in the session so that the user is automatically logged in for every subsequent request.

b. To authenticate user via Password, do the following:

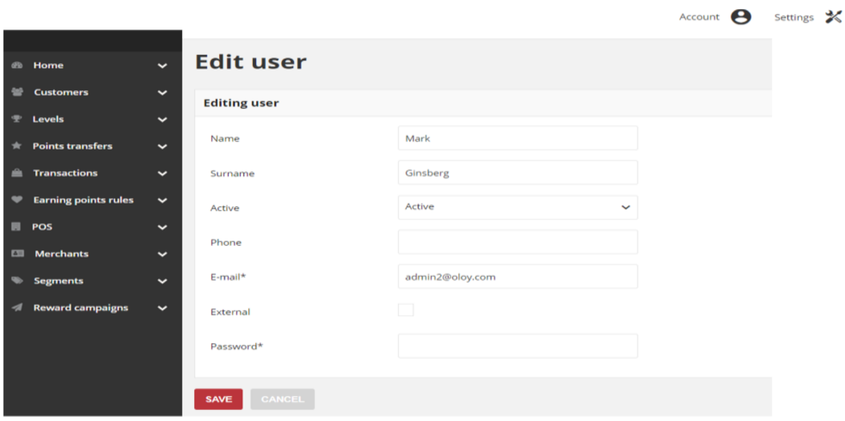
- Leave **External** checkbox blank
- Assign a **Password** to the account.

5. Set **Active** field to “Active”

6. When complete, tap **Save**

Locked users

Any user account that is currently inactive appears in the Users list as grayed-out. An account can be unlocked (set to active) by other Admin user.



Admin User Editing

To edit an admin account:

1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Users.**
2. In the Users list, find the record to be edited and click **Edit** ( ) icon in the Action column to open the record in edit mode.
3. Make any necessary changes to user account information. If you change password/API key, make sure to inform user about changes
4. When complete, tap **Save**

To lock/unlock an admin account:

1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Users.**
2. In the Users list, find the record to be edited, and click **Edit** ( ) icon in the Action column to open the record in edit mode
3. Set **Active** field, to one of the following:

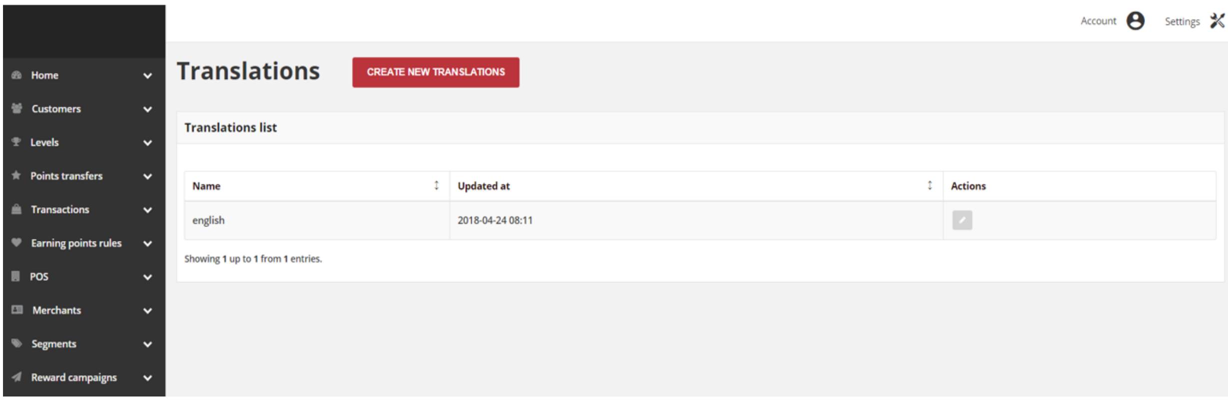
Active	to unlock admin account. User can log in and have access to the Open Loyalty platform.
Inactive	To lock an admin account. User will not be able to log in and have access to the Open Loyalty platform.

Admin users can not be deleted from Open Loyalty platform. To prevent any user from access to the platform, set the Active field as Inactive.

Translations

The Translations determines the language that is used throughout the Open Loyalty. All content elements will appears in the selected language.

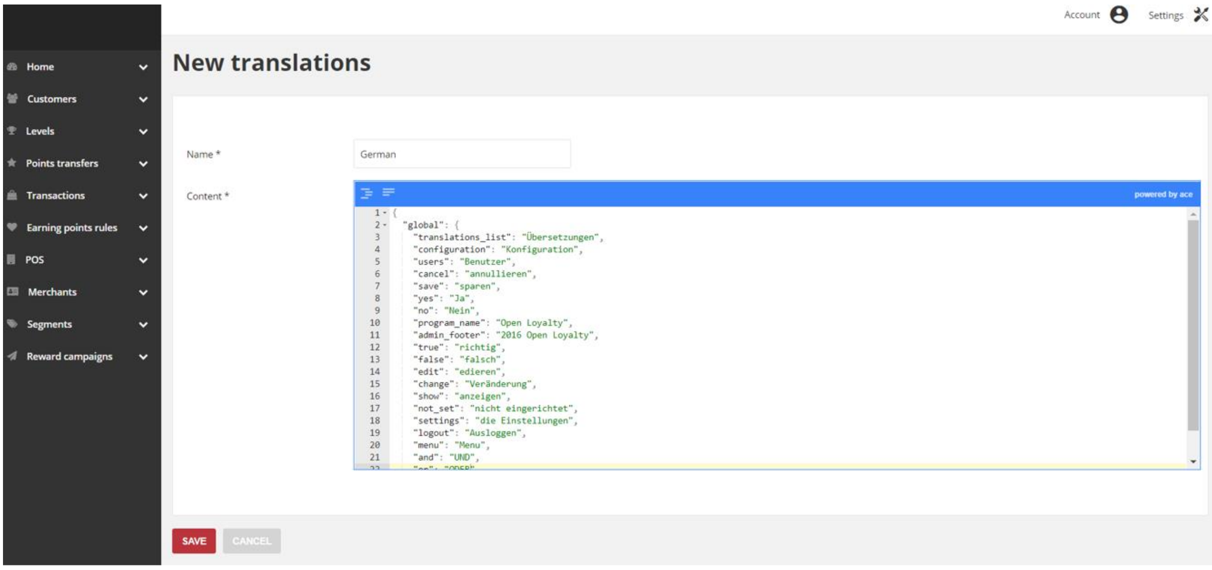
Most of the content elements that appears to be hard-coded on pages throughout your Open Loyalty platform can be instantly changed to a different language by adding translation. Translation form provides the interface text that is used throughout the platform. The content can be changed includes navigational titles, labels, buttons, and links such as “List of customers” and “Account.”



Translations Lists

To add new translation:

1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Translations.**
2. To add new translation, tap **Create new translations**



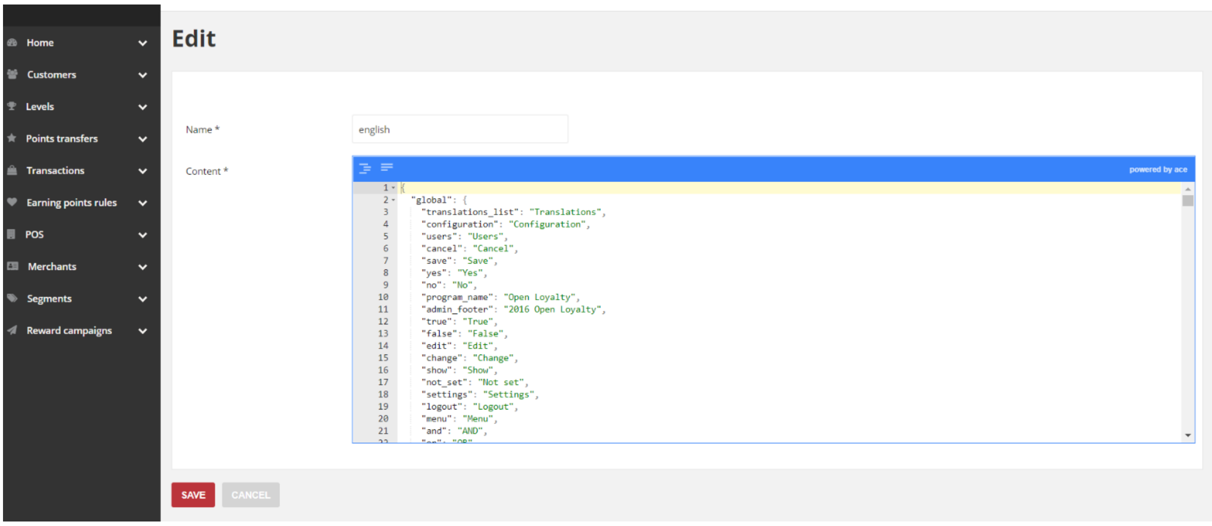
New Translations Form

3. Enter a **Name** for the translations. For example: German
4. In **Content** field, for each text to be edited either paste or type the translated text into the field. Translated text is marked in green.

   Text in editor must be valid JSON.
5. When complete, tap **Save**
6. Repeat the process for all language version used in the Open Loyalty

To edit a translation:

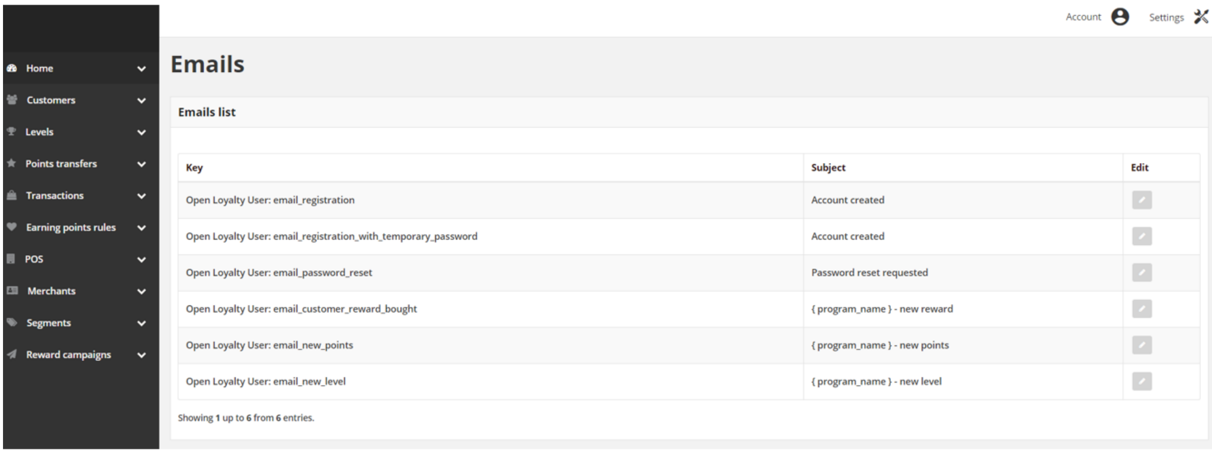
1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Translations**
2. In the **Translations list** grid, find the record to be edited, and click **Edit** ( ) icon in the Action column to open the record in edit mode
3. Make any necessary changes to translated text.
4. When complete, tap **Save**
5. Date of last translation modification will be displaying in the **Translations list** grid in the **Updated at** column.



Translation Editing mode

Emails

Email templates define the layout, content, and formatting of automated messages sent from Open Loyalty. Open Loyalty includes a set of responsive email templates that are triggered by a variety of events that take place during the operation of your Loyalty Program. You will find a variety of prepared email templates related to customer activities, admin actions, and system messages that you can customize



Email Templates

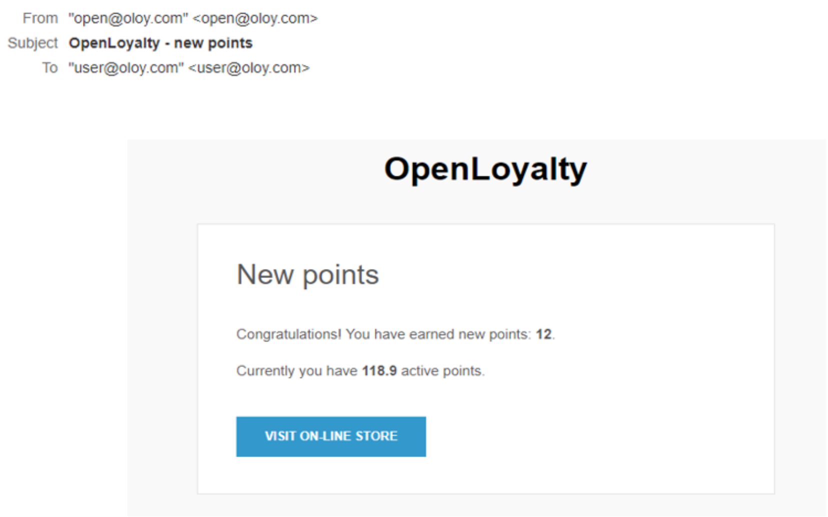
Email templates

EMAIL	EVENT	DESCRIPTION
REGISTRATION WITH TEMPORARY PASSWORD		
	E-mail send after registering new Customer Account using Administrator Cockpit, POS Cockpit, API.	It contains temporary password to activate an account and link to download Terms & Conditions file (.PDF)
REGISTRATION		
	E-mail send when Customer register to program using Customer Cockpit.	Email with link to activate account (password is entered by customer during filling out registration form) and link to download Terms & Con-ditions file (.PDF)
PASSWORD RESET		
	Send when user click on Forgot password and provide proper email address	E-mail with reset password link
CUSTOMER REWARD		
	Send after Customer confirm reward redemption	It contains coupon code and reward campaign name.
NEW POINTS		
	Send after Customer earn points	It contains new points value and current amount of all active points

NEW LEVEL		
	Send after Customer reach next level	It contains information about customer new level and new discount.

Customizing Email templates

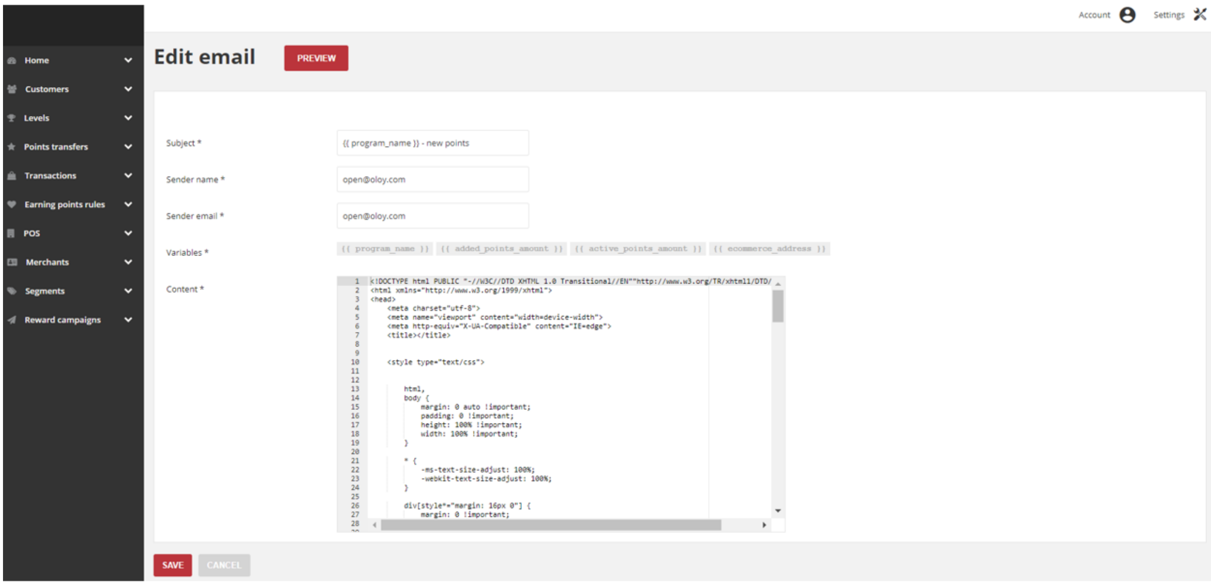
Open Loyalty includes a default email template for the body section of each message that is sent by the system. The template for the body content is formatted with HTML and CSS, and can be easily edited, and customized.



Preview of New Points Email

To edit an email template:

1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **Emails**
2. In the **Emails list** grid, find the record to be edited, and click **Edit** ( ) icon in the Action column to open the record in edit mode



Template Information

3. Make any necessary changes to the following:

   a. Enter new **Subject** of email message which will be displayed when recipient get email. For example OpenLoyalty – new points. The Template Subject appears also in the Subject column in **Emails list** grid.

   b. In **Sender name** field enter the name which will be displayed when recipient open an email in external email system, as the reference so that your recipient knows it was you who sent the message

   c. In **Sender email** field provide an email address which will be displayed when recipient open an email in external system,

   d. Every template has predefined variables added to content in **Variables** field. The selection of available variables depends on the template and can not be changed.

   e. HTML code is used to define content of email**.** In the **Content** box, modify the HTML as needed. Any changes of the content should be made by technical persons, who knows HTML to avoid further technical issues with templates.

When working in the template code, be careful not to overwrite anything that is enclosed in double braces

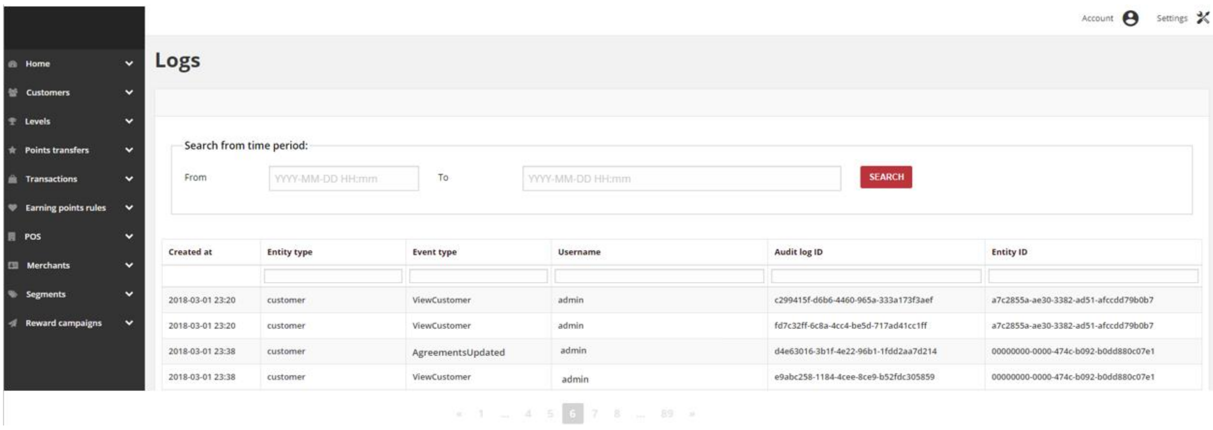
4. When you are ready to review your work, tap **Preview** . Then, make adjustments to the template as needed.

5. When complete, tap **Save**

System logs

Logs grid allows to monitor every changes on the customer data. The log file is accessible only to Admin users throughout the Admin Cockpit. Logs view allows you to check the date and time that change was made, type and unique ID of change and user name and his unique ID associated with this change.

In addition you can control logs results by filter and search option.



System Logs

System monitors and logged following events/operations:

1. ***Create*** –
   Customer and all elements related to customer: transactions, transfers.

   <u>For example</u>: new points transfer to customer account creation

2. ***Modify*** -
   Customer, all elements related to customer (transactions, transfers, redeemed rewards), operations that change customer data indirectly (segments and level assignment)

   <u>For example:</u> agreements updated,

3. ***Read*** -
   Customer and all elements related to customer: transactions, transfers, redeemed rewards

   <u>For example</u>: view customer

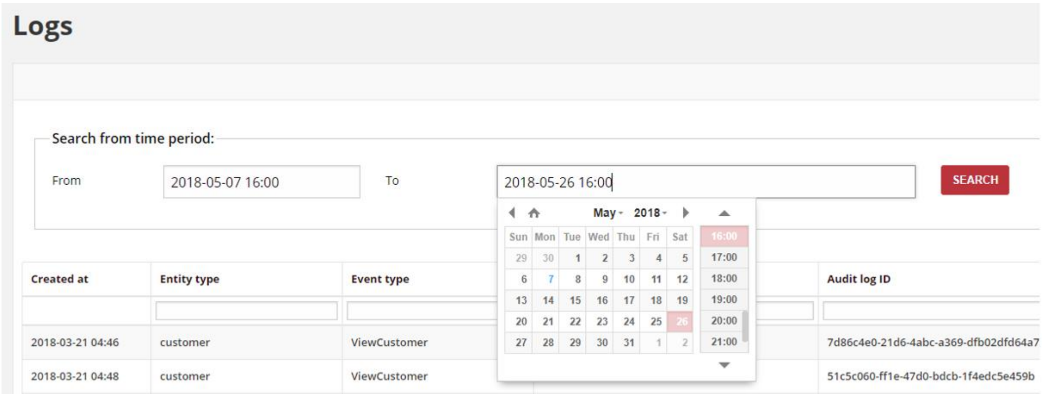
4. ***Delete*** -
   Customer, all elements related to customer (transactions, transfers, redeemed rewards), operations that change customer data indirectly (segments and level assignment)

   <u>For example</u>: delete points transfer to customer account

Search Logs by date range

You can search for system logs by a certain time period using **Search from time period** search box. Date ranges can be specified with static start and end dates.

The date format is as follows: “YYYY-MM-DD HH:mm” and allows to display logs that have been placed from and up to the specified date



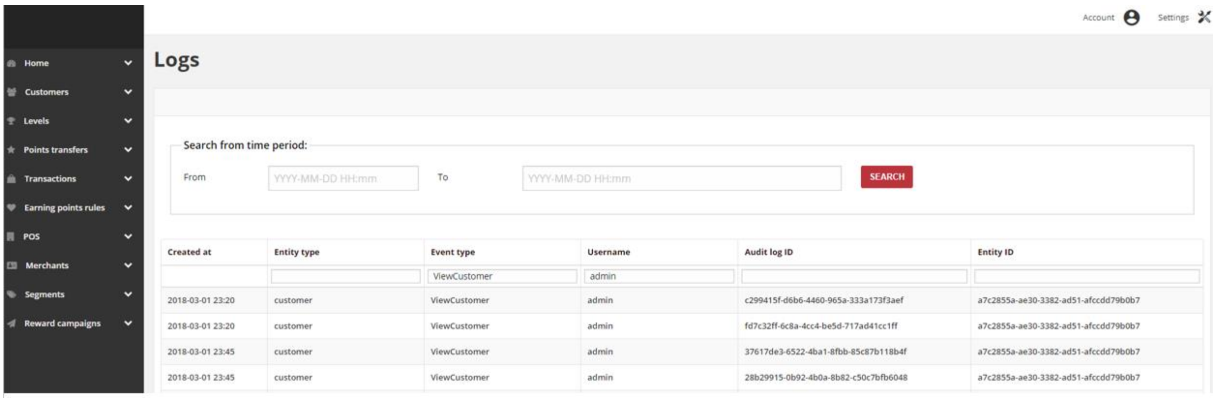
Search box

To find a match:

1. In the In the upper-right corner, tab the **Settings** ( ) icon. Then on the menu, choose **System logs**
2. Set up the starting date in **From** field by selecting date and time from calendar grid
3. Set up the end date in **To** field by selecting date and time from calendar grid
4. When complete, tap **Search**

Search/Filter Logs

The filters in the header of each column can be used to limit the list to specific values. You can simply type the value you want to find and press Enter.



Search/Filter Logs Results

To search the list:

1. In the selected column in the field under column header type the value you want to find
   - To find a close match, enter the few letters/signs of what you want to find
   - To find an exact match, enter the exact word/number you want to find.
2. You can put as many values under different columns headers as needed to describe the conditions that must be met for the search result. Search values from each column create an AND Condition rule. It means that in search results only records matching all entered values are displayed.

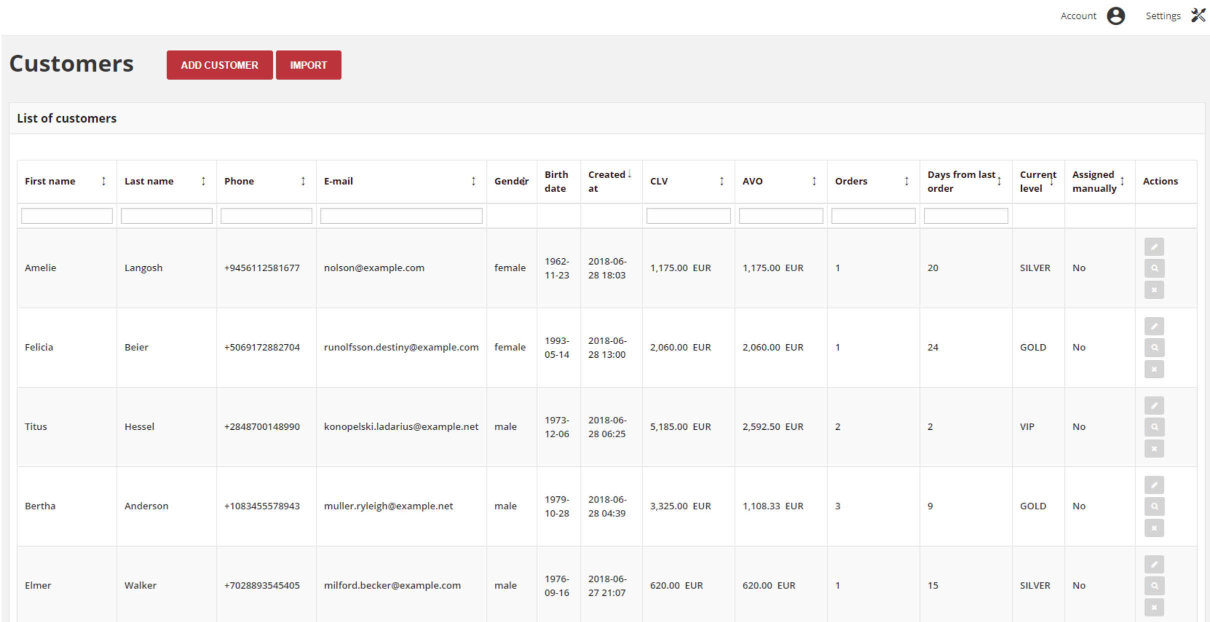
CUSTOMERS

In this section of the guide, you will become familiar with the customer account menu, and learn to manage customer accounts according to adding, deleting and modifying data. You will also learn how to create customer account that can be referenced in customer levels and segments.

CHAPTER 4:

CUSTOMERS MENU

The Customers menu provides access to all customer information required for its existence in your Loyalty Program. This applies to both, customer personal data (such as name, surname, gender, date of birth and contact details) and data on its activity in the program (such as registered transactions and points transfer).

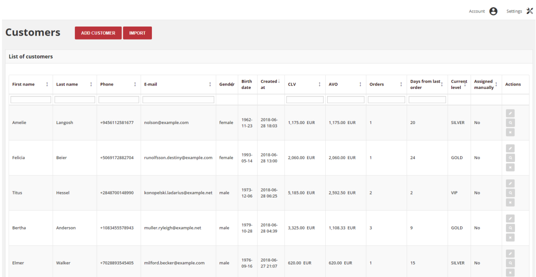


Customers Menu

To display the Customers menu:

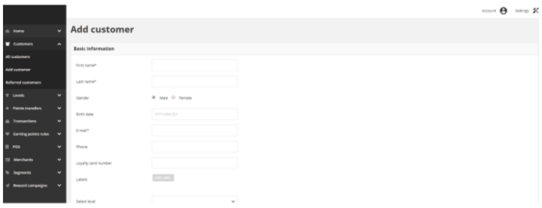
On the Admin sidebar, tap **Customers**, then choose **All customers**.

Menu options



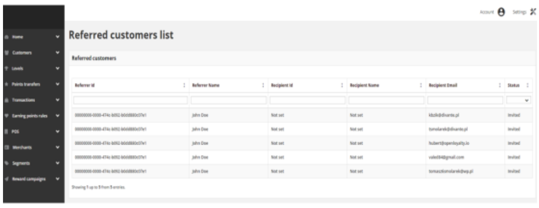
All customers

Lists all customers who have registered for an account with your loyalty program, or were added by the administrator.



Add customer

Lists all data that need to be filled out to add new customer to your Loyalty Program



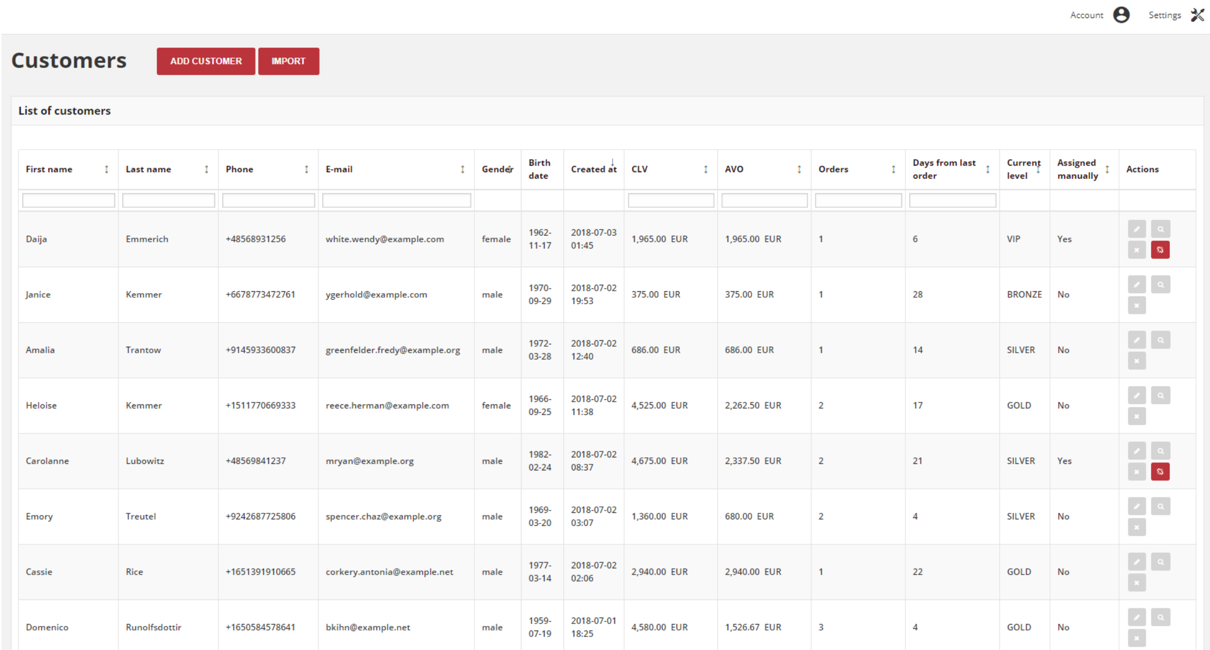
Referred customers

Lists all referred customers and recipients of their invitations details

All Customers

The Customers page lists all customers who have registered for an account with your loyalty program, or were added by the administrator (manually or imported from XML file)

Use the standard controls to sort the list, filter and search customer by typing in the field under column header value you want to find, and apply actions to selected customers. Pagination controls appear if there are more customer records than fit on the page, and are used to move from one page to the next.



All Customers

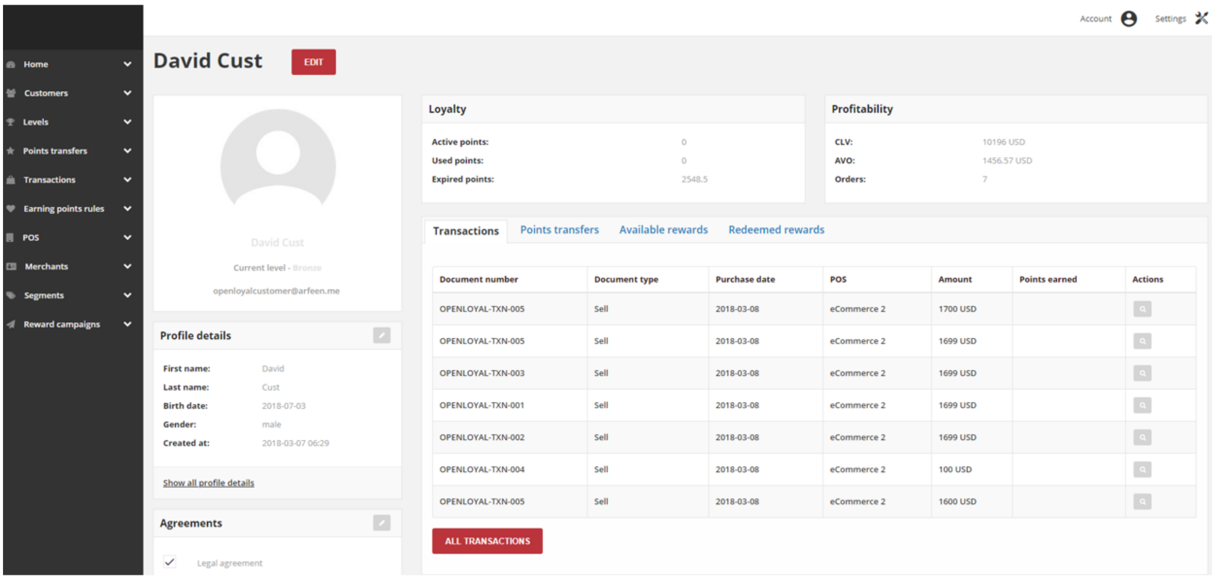
Field description

FIELD	DESCRIPTION
First name	The first name of the customer
Last name	The last name of the customer
Phone	The customer's phone number. Can be used as a login to Customer Cockpit or search/filter option.
E-mail	The customer's email address. Can be used as a login to Customer Cockpit or search/filter option.
Gender	The customer gender
Birth date	The customer's date of birth
Created at	The date when customer account was created
CLV (Customer Lifetime Value)	The total amount of customer registered transactions

AVO **(**Average Value of Order)	The average amount of customer registered transactions
Orders	The total number of registered transactions (orders) from customer registering in the Loyalty Program
Days from last order	The number of days since the last registered customer transaction
Current level	Current level that is assigned to customer account. To learn more about levels see **Levels**
Assigned manually	Information whether current customer level was assigned manually by Admin or not. Options include: Yes/No. To learn more about distinction between manually assigned level and system assignment please see **Levels**
Actions	The operations that can be applied to selected customer record. Options include: • Edit customer account • View Customer profile details • Deactivate customer account • Unlink manually assigned level. Previous system level will be assigned.

To view customer detail information:

1. On the Admin sidebar, tap **Customers**. Then choose **All Customers**
2. In the Customers list, find the record to be previewed and click **View** ( ) icon in the Action column to open the record in view mode.



Customer Record Preview

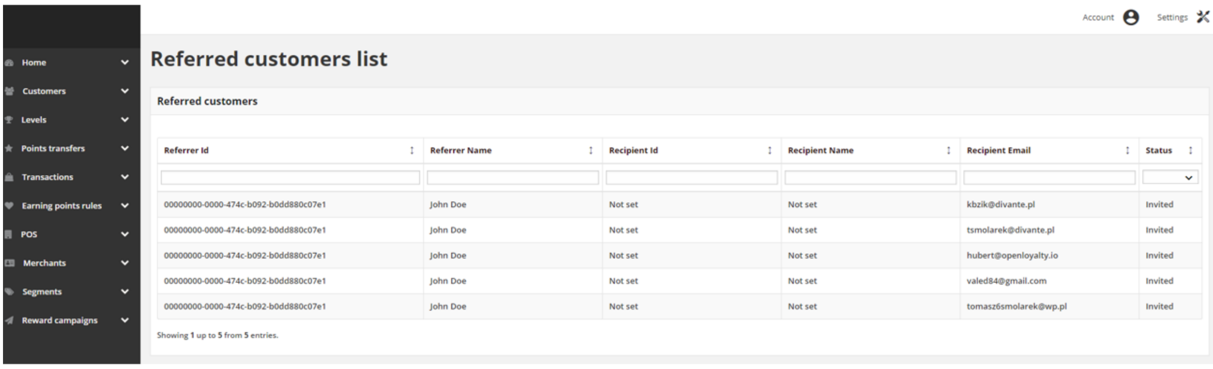
To learn more about **Customer Profile Detail Page**, see **Profile details**

Referred customers

Referral (refer a friend, member get member) functionality allow to reward Customers for invitation other Customers to Loyalty program. It allows to give prize either referrer (Customer who send invitation) and recipient (Customer who respond with action to invitation).

Administrator can view all invitations sent by customer with current status:

- **Invited** – invitation was sent by referrer to the recipient on his email address
- **Registered** – referred customer (recipient) register new account in Open Loyalty
- **Made purchase** – referred customer (recipient) made first purchase in Open Loyalty



Referred Customers

To see all customers who send and received invitation:

1. On the Admin sidebar, tap **Customers**. Then choose **Referred customers.**

Column descriptions

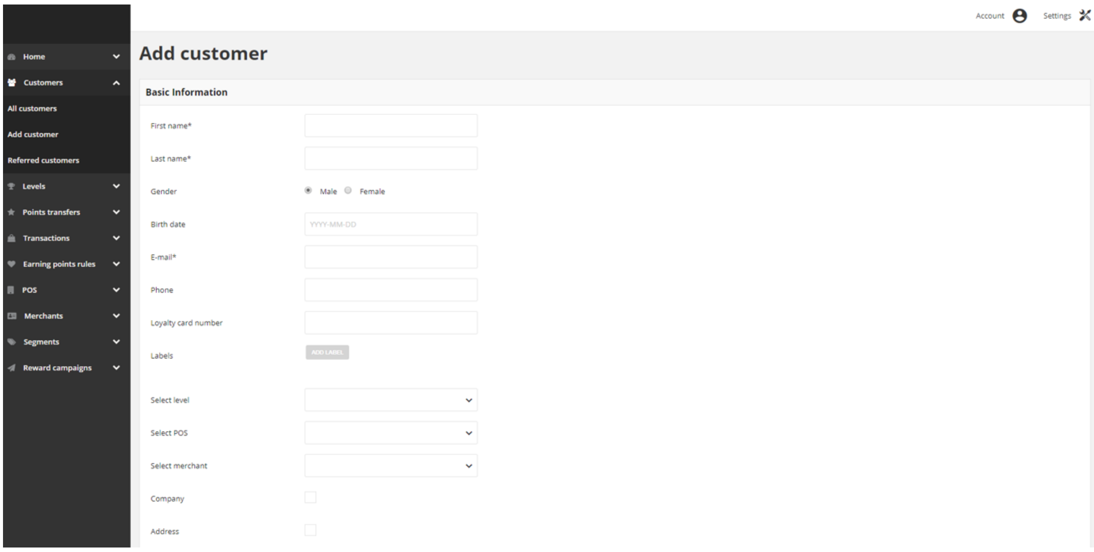
COLUMN	DESCRIPTION
Referrer Id	The customer ID of a registered customer, who send invitation
Referrer Name	The name and surname of a registered customer
Recipient Id	The customer ID of a referred person. Will be shown when referred customer will register
Recipient Name	The name and surname of a referred person. Will be shown when referred customer will register
Recipient Email	The email address of an invitation recipient
Status	Options include: invited/registered/made purchase

CHAPTER 5:

CREATING CUSTOMER ACCOUNT

Customer usually create their own accounts from your webshop or using Customer Cockpit. However, you can also create customer account directly from the Admin or POS Cockpit, which is useful when customers order by phone or at merchant location.

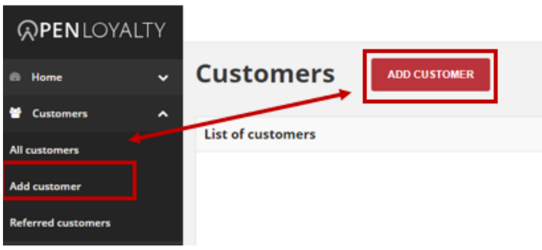
The Customer account created from the Admin or POS Cockpit has an active status at once, so there is no need to activate its account by him



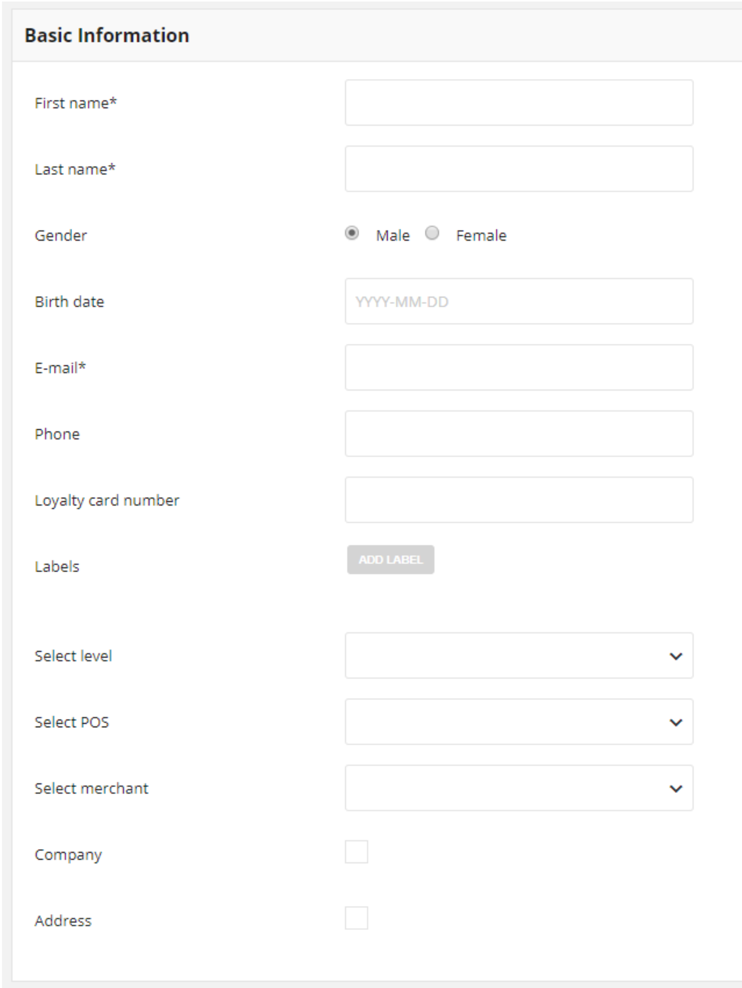
New Customer Account Information

To create a New Customer Account :

1. On the Admin sidebar, tap **Customers**. Then, choose **Add Customer**. You can also add customer directly from **All customers** list by clicking **Add Customer** at the top of the page.



Add Customer Options



Basic Information

2. In the **Basic Information** section, complete the following required fields:

- First name
- Last name
- E-mail

For one email address only one Customer Account could be created.

You can change the email address associated with an account by editing a customer

3. In the same section, complete the optional fields as needed:

- Gender
- Birth date
- Phone
- Loyalty card number

- Select level
- Select POS
- Select merchant

4. If applicable, create **Label(s)** you want refer to customer. Labels are intended to be used to specify identifying attributes of customer. Labels can be used to organize and to select subsets of customers at customer segmentation process. To learn more about Customer segmentation, see **Segments**

Customer Labels

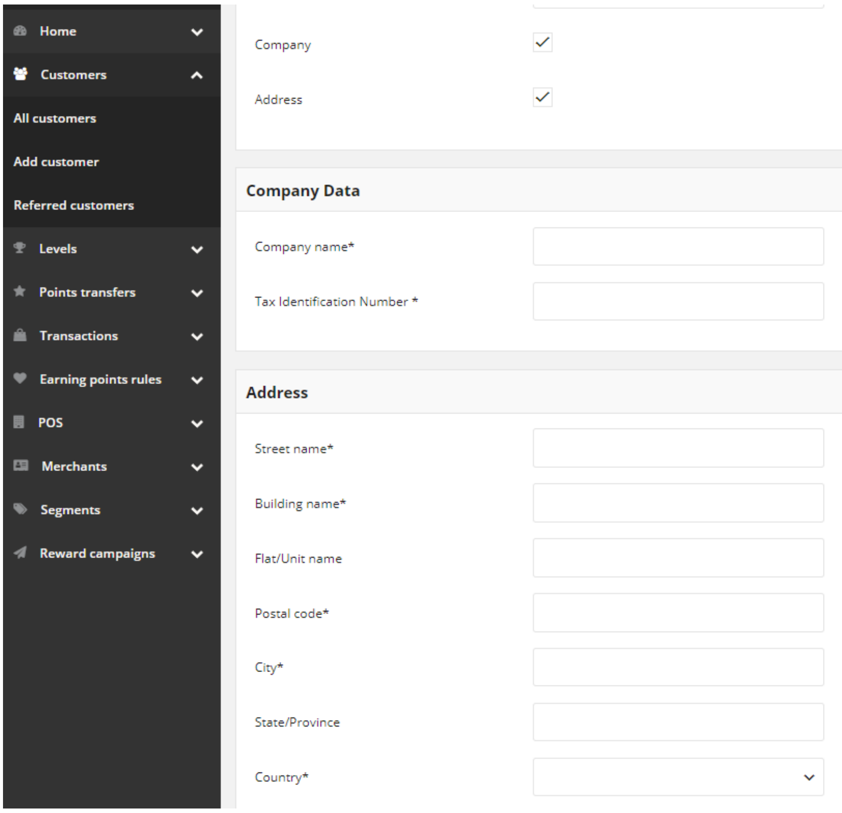
   a. To create Label, tap Add Label and do the following:
      - Type label **Key**, which is a label name
      - Type label **Value**

      For example: Key – Customer type, Value – wholesale

   b. Repeat the process for all labels you want to used in your Loyalty Program

Labels can be added to customer during account creation and subsequently added and modified at any time

5. Mark **Company** checkbox, to define customer type if needed.
6. Mark **Address** checkbox, to complete customer address information if needed.



Company Data and Address Sections

7. **Company Data** section is available only when **Company** checkbox is selected. All fields available in this section i.e. **Company name** and **Tax Identification Number** are required and need to be filled out.

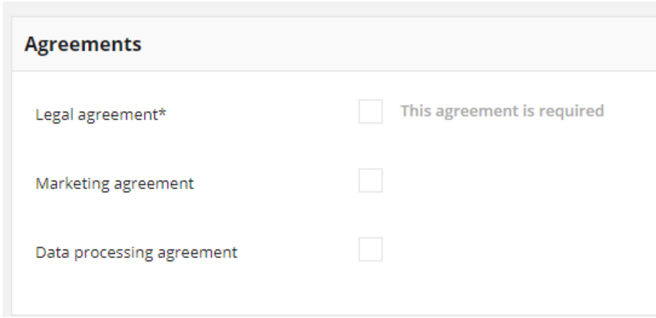
8. **Address** section is available only when **Address** checkbox is selected. Complete the following required fields:

    - Street name
    - Building name
    - Postal code
    - City
    - Country

    In the same section, complete the optional fields as needed:

    - Flat/Unit name
    - State/Province

9. Mark the **Agreements** that customer has agreed to. **Legal agreement** is required and need to be filled out to set up an account.



Agreements

10. When complete, tap **Save**

When the customer account is saved, it's record appears at **All customers** list. The Customer Profile Details tab displays a summary of account activity and data provided during account creation. To learn more about Customer Profile, see **Profile details**

Field description

FIELD	DESCRIPTION
BASIC INFORMATION	
First name*	The customer's first name
Last name*	The customer's last name
Gender	Identifies the customer's gender as Male or Female
Birth date	The customer's date of birth. Information can be used to calculate points for the birth anniversary
Email*	The customer's email address. Is used as a login name while logging to Customer Cockpit.
Phone	The customer's phone number. Formatting is as on follow example: • Country code: +48 • Subscriber number: 123456789 • In total: +48123456789
Loyalty card number	The customer loyalty card number
Labels	Internal tags you can use to refer your customer. If applicable, can be used to segmentation to identify the customers that this segment applies to
Select level	Starting level assigning to customer
Select POS	POS which will be linked to the customer
Select Merchant	Merchant account, which will be linked to the customer
Company	customer associated with company. If marked then additional section will be shown.
Address	customer address needed. If marked then additional section will be shown
COMPANY DATA *Visible only when **Company** checkbox is marked*	

Company name*	The company name, if applicable for this customer
Tax Identification Number*	The company Tax or Value Added Tax number, if applicable

ADDRESS

*Visible only when **Address** checkbox is marked*

Street name*	The street address of the customer
Building name*	The name/number of a building or property where the customer resides at this address
Flat/Unit name	The flat/unit name or number of the customer at this address
Postal code*	The postal code of the customer at this address
City*	The city where the customer resides at this address
State/Province	The state or province of the customer at this address
Country*	The country where customer resides at this address

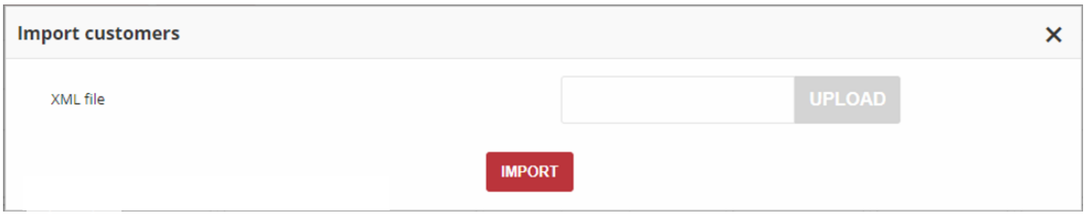
AGREEMENTS

List of consents to which the customer can/has agreed. Options include:

- Legal agreement (required)
- Marketing agreement
- Data processing agreement

Import Customer list

If you have a customer list that you want to add to your Loyalty Program, you can enter it into a customer XML file and then import it in your Open Loyalty Admin.

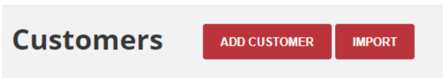


Customers import

Importing a XML file will create a customer in your Loyalty platform for each email address, phone number and loyalty card number in the file. **Any customers with duplicate email addresses, phone numbers or loyalty card number will be skipped** during an import

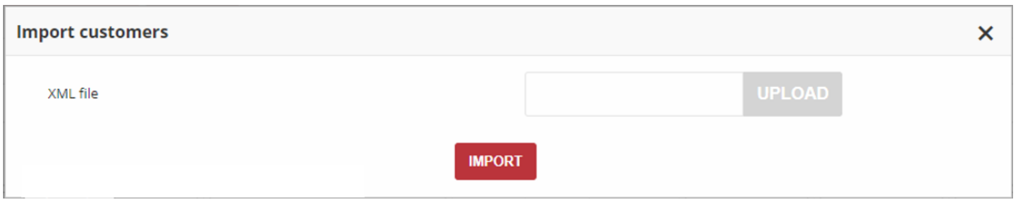
To import a Customer list from a file:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**
2. Click **Import** at the top of the page, next to **Add customer**



Customers Import Button

3. In the **Import Customers** dialog, click **Upload** and then choose your customer XML file.



Import customers

4. When file selected, click **Import**

The customers whose records you've added to the XML file will appear in the All customers list in your Open Loyalty admin

XML file structure

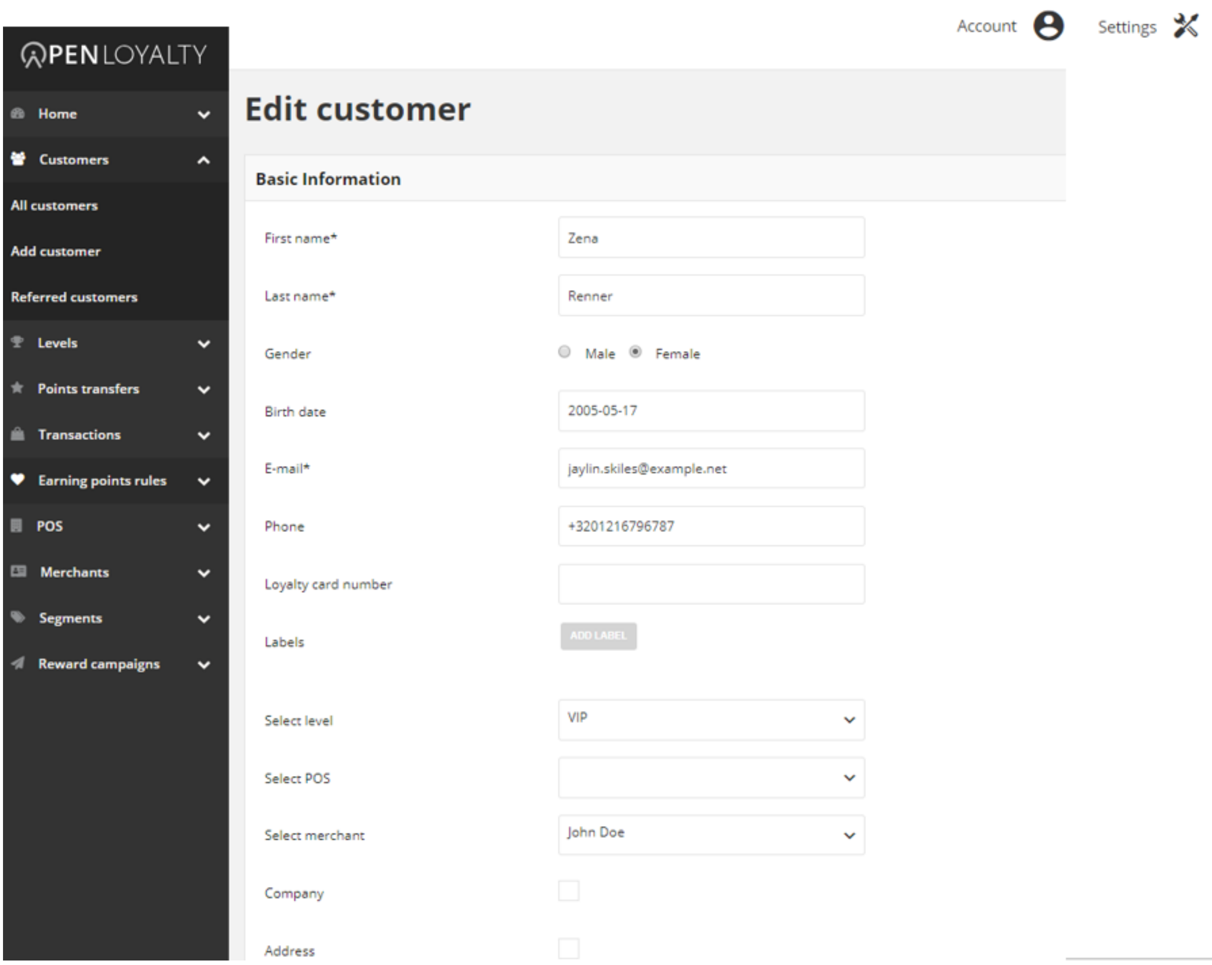
Example of Customer XML file structure below:


```
<?xml version="1.0" encoding="UTF-8"?>
<customers>
  <customer>
    <active>true</active>
    <sendActivationMail>false</sendActivationMail>
    <address>
      <address1>Building name </address1>
      <address2>Flat/Unit name</address2>
      <city>Wroclaw</city>
      <country>PL</country>
      <postal>45-123</postal>
      <street>Main road</street>
    </address>
    <agreement1>true</agreement1>
    <agreement2>true</agreement2>
    <agreement3>true</agreement3>
    <birthDate>1985-02-03</birthDate>
    <company>
      <name>Company</name>
      <nip>123-12-22-123</nip>
    </company>
    <email>jdoe@example.com</email>
    <firstName>John</firstName>
    <lastName>Doe</lastName>
    <gender>male</gender>
    <labels>
      <label>
        <key>group</key>
        <value>wholesaler</value>
```

```xml
            </label>
        </labels>
        <loyaltyCardNumber>12982332</loyaltyCardNumber>
        <phone>4823123123</phone>
        <posId>00000000-0000-474c-1111-b0dd880c07e2</posId>
        <sellerId>00000000-0000-474c-b092-b0dd880c07e4</sellerId>
    </customer>
</customers>
```

Updating customer account

You can edit information about your customers, including all their data provided during account creation process. You can update customer data directly from their Profile Detail Page or by selecting it’s record from All Customers list.

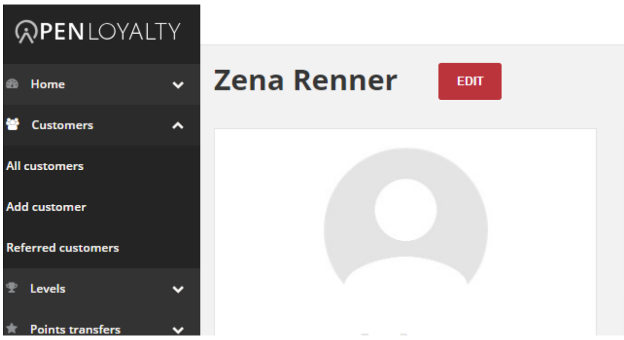


Customer account editing

To edit a Customer Account from Customers list:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. In the Customers list, find the record to be edited and click **Edit** ( ) icon in the Action column to open the record in edit mode.
3. Make any necessary changes to the customer account information.
4. When complete, tap **Save**

To edit a Customer Account from Profile Detail Page:



Edit Option in Profile Details

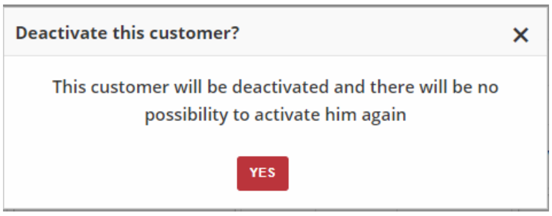
1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. In the Customers list, find the record to be previewed and click **View** ( ) icon in the Action column to open the record in view mode.
3. Click **Edit** at the top of the page. The same editor will be opened like in example above.
4. Make any necessary changes to the customer account information.
5. When complete, tap **Save**

Deactivate a customer’s account

Any customer account that is currently inactive appears in the Customers list as grayed-out. An account can be locked and unlocked (set to active) by Admin user.

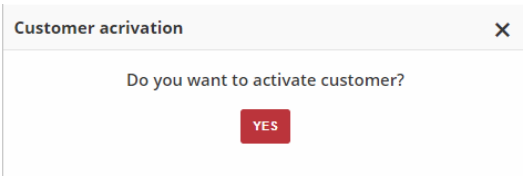
To lock/unlock an admin account:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**. You can also deactivate/activate customer account from **Edit mode**.
2. In the Customers list, find the record to be lock/unlock and click **Deactivate/Activate** ( ) icon in the Action column.
3. System will display a message asked you to confirm the action



System Message

4. The deactivated customer account appears on the Customers list as a greyed-out.
5. To activate an account click the same icon ( ) and confirm the action



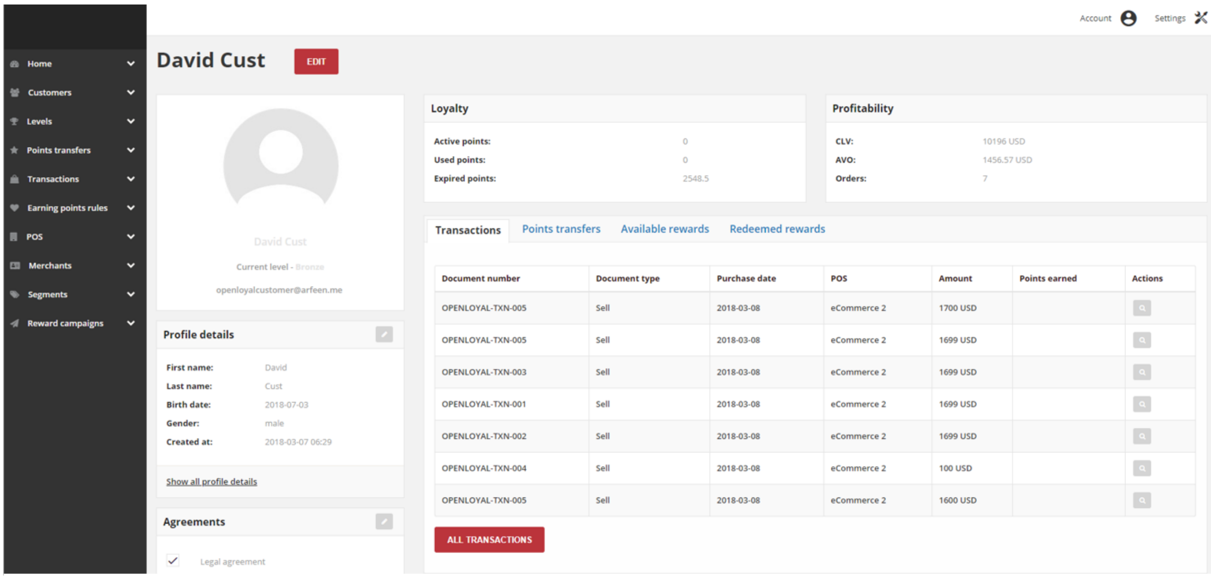
System message

6. The activated customer account appears on the Customers list as a black

CHAPTER 6:

CUSTOMER PROFILE DETAILS

The Customer Profile Detail Page is used to hold all the details of your customers. You can view and manage the customer's loyalty & personal information, history of customer transactions, points transfer and redeemed rewards.



Customer Profile

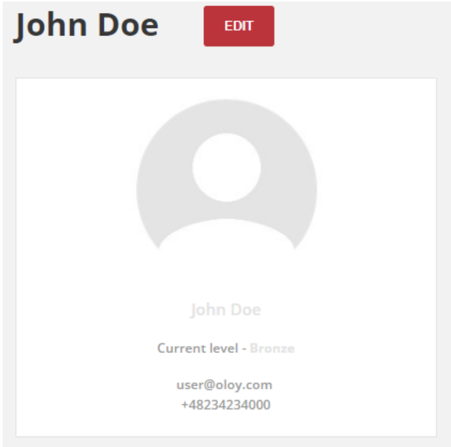
Customer Account details

Profile details

The Customer Profile details section provides the short customer account summary and information of customer provided during registration.

Block in the upper left corner, shows some factors describing Customer and its account summary, such as:

- First name,
- Last name,
- Current loyalty level,
- Email address
- Phone number

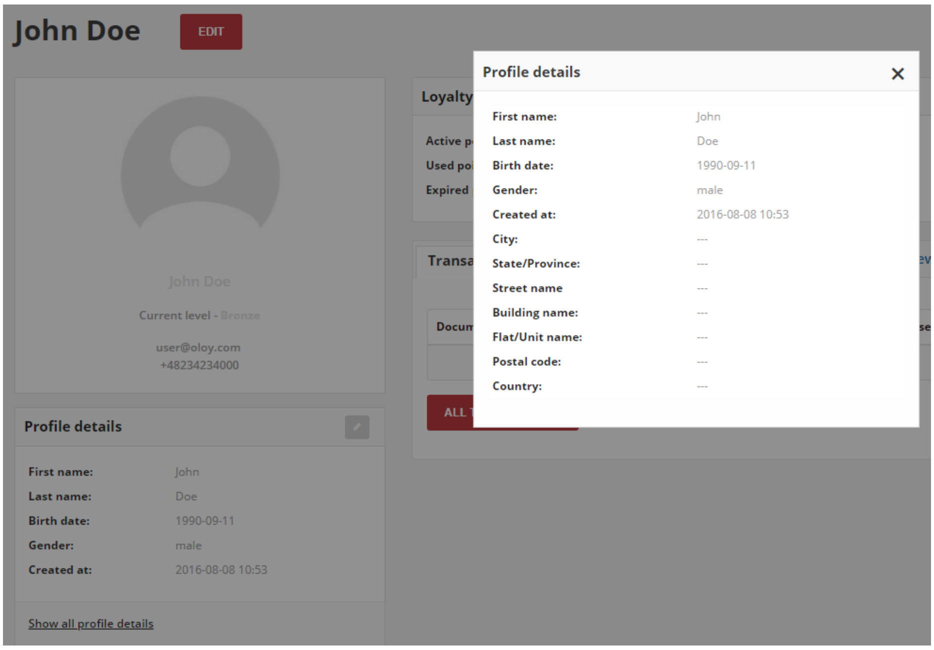


Customer Account Summary

Block below, provides a snapshot of customer personal information entered during registration process both required and optional. Address information will appear in small window after clicking ***Show all profile details*** link.

If the optional information (such as birth date, gender, address etc.) will not be completed during registration, the corresponding fields in this sections remain blank.

To update customer data go to edit mode by clicking **Edit** ( ) icon in the block header or Click **Edit** above account summary block, at the top of the page.



Customer Profile Details

The following details are displayed in this section:

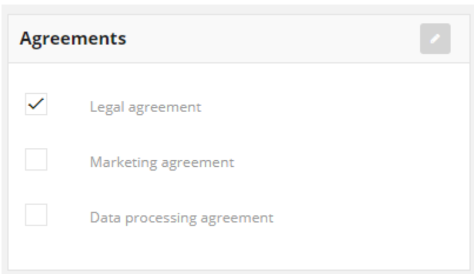
1. **Profile details (displaying in block)**

- First name
- Last name
- Birth date
- Gender
- Created at

2. **Profile details (after link clicking)**
   - Basic information displaying in block, and in addition address information:
     - City
     - State/Province
     - Street name
     - Building name
     - Flat/Unit name
     - Postal code
     - Country

Agreements

Agreements section is a list of consents and include information about their acceptance by customer. If the customer has accepted the agreement, the checkbox in the name record is marked.

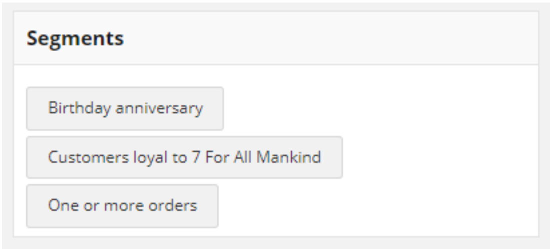


Agreements

To mark the agreement as a accepted by the customer go to edit mode by clicking **Edit** ( ) icon in the block header or Click **Edit** above account summary block, at the top of the page.

Segments

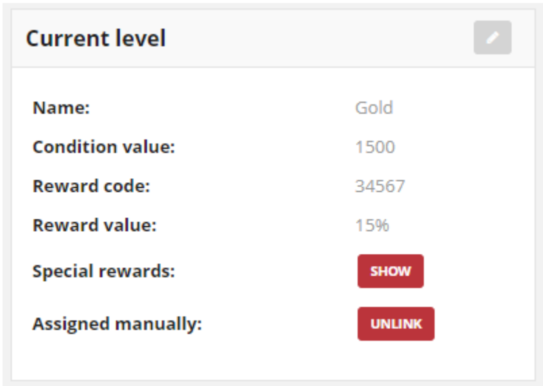
Segments box consists list of segments to which the customer is currently assigned. To learn more about segments, see **Segments**



Segments

Current level

Current level section provides information about current (assigned to customer) level and rewards if available.



Level Section

Special rewards specify temporary additional discounts that customer assigned to this level can get.

Special rewards

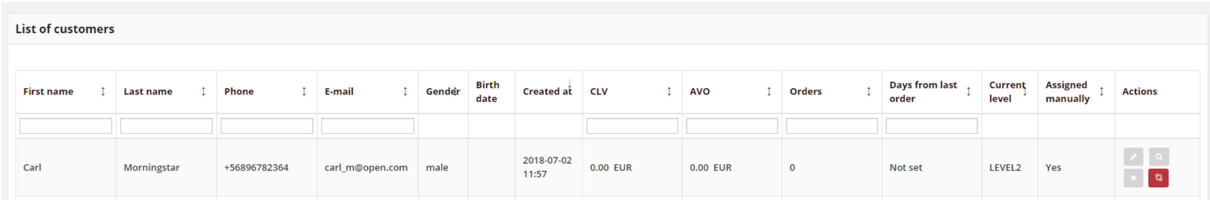
Name	Reward code	Reward value	Active	Start at	End at	Created at
Mother's Day 2016	89011	0.2	true	2016-05-25 00:00	2016-05-26 00:00	2018-05-10 10:54
Father's Day 2016	78901	0.2	true	2016-03-18 00:00	2016-03-19 00:00	2018-05-10 10:54

Special Rewards Preview

To **change manually the level** to which the customer is assigned go to edit mode by clicking **Edit** ( ) icon in the block header or click **Edit** above account summary block, at the top of the page. Then, additional field **Assigned manually** appears.

To remove manual assignment by Admin, and let customer earn points based on Earning points rules click **Unlink**

You can also simply Unlink manually assignment also from All customers list by clicking **Unlink** ( ) icon in the **Action** column.



Unlink manual assignment

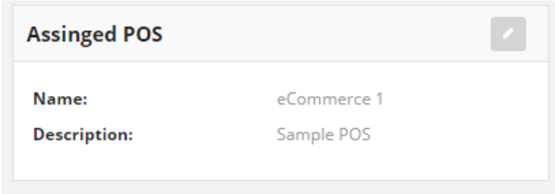
To learn more about levels and special rewards, see **Levels**

Field description

FIELD	DESCRIPTION
Name	Name of the customer level
Condition value	The points limit value after which customer was assigned to the level
Reward code	Discount code to be used on
Reward value	Percentage discount value
Special rewards	Special discounts available when additional conditions are met
Assigned manually	Field will be displayed only when customer level will be assigned manually by Admin – during adding or editing account. To remove manual assignment click **Unlink**

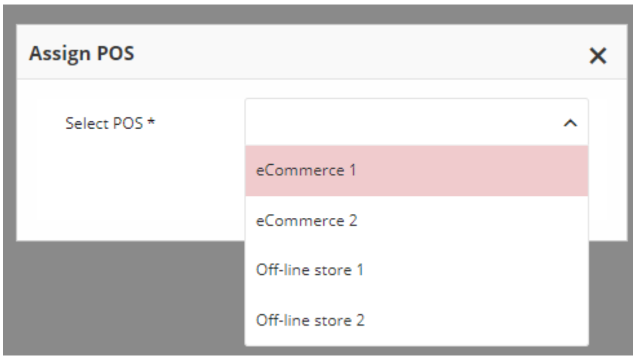
Assigned POS

Assigned POS section include information about customer account assignment to the offline or online store. Customer can be assigned to only one POS.



Assigned POS

To change the POS to which the customer is assigned click **Edit** ( ) icon in the block header and select new POS from a list or Click **Edit** above account summary block, at the top of the page to go to edit mode.

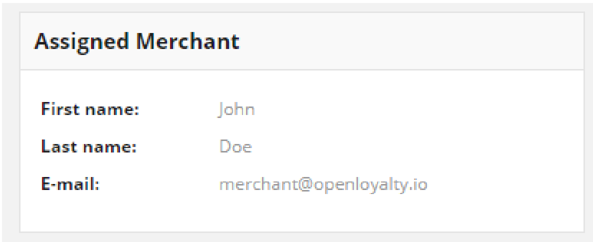


Change of POS assignment from Profile Detail Page

To learn more about offline stores, see **POS**

Assigned Merchant

Assigned Merchant section provide information to which merchant customer is assigned. Not only merchant from POS assigned to customer account can be selected.

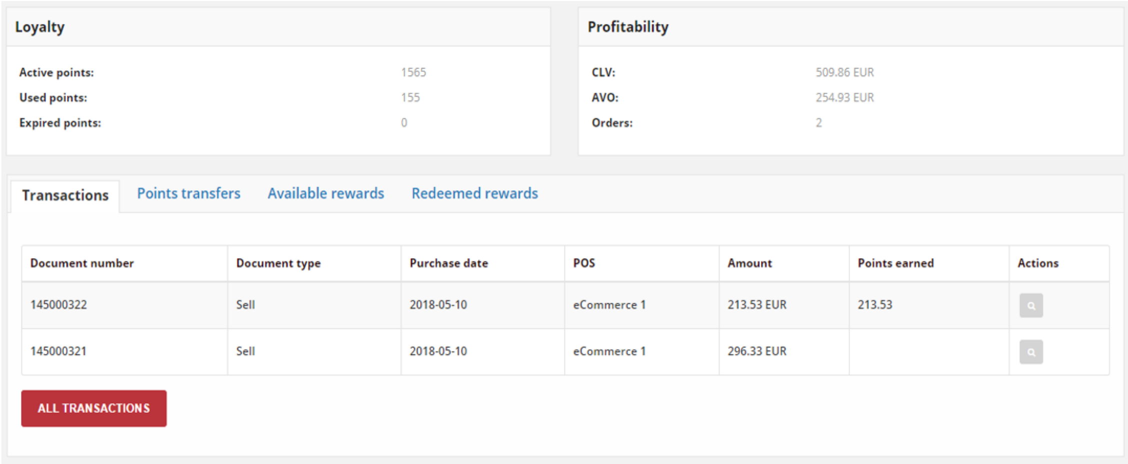


Assigned Merchant

To change the Merchant to which the customer is assigned click **Edit** above account summary block, at the top of the page to go to edit mode.

Customer Loyalty Activity

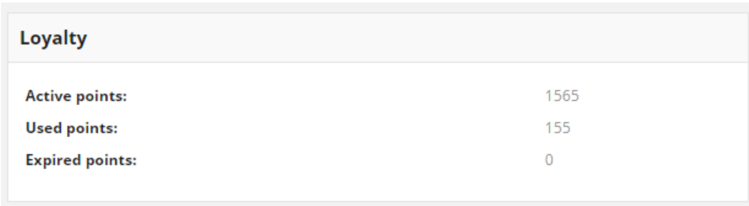
In the middle part you will find customer data related to his activity in Loyalty Program such as loyalty points balance, transactions, points transfer and rewards (available and redeemed) summary.



Customer Loyalty Activity

Loyalty

In **Loyalty** section you can view Loyalty Points balance in the customer's account.



Loyalty Points Balance

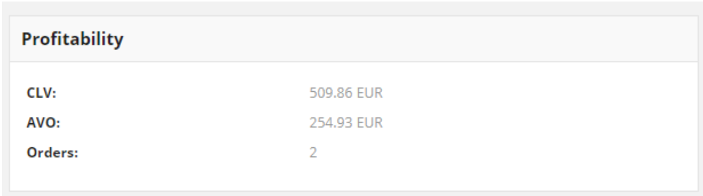
a. **Active Points** - Points assigned to the customer account thought various activity within the loyalty program based on Earning Points Rules.

b. **Used Points** - Points redeemed by the Customer thought various Reward Campaigns within the loyalty program

c. **Expired Points** - Points expired due to non-redemption of assigned active points. Points will expire after number of days from date of adding Point transfer. Points lifetime is set in **Open Loyalty Configuration**

Profitability

Profitability include information about basic factors regarding customer transactions within the loyalty program.



Profitability

CLV:	509.86 EUR
AVO:	254.93 EUR
Orders:	2

Customer Profitability

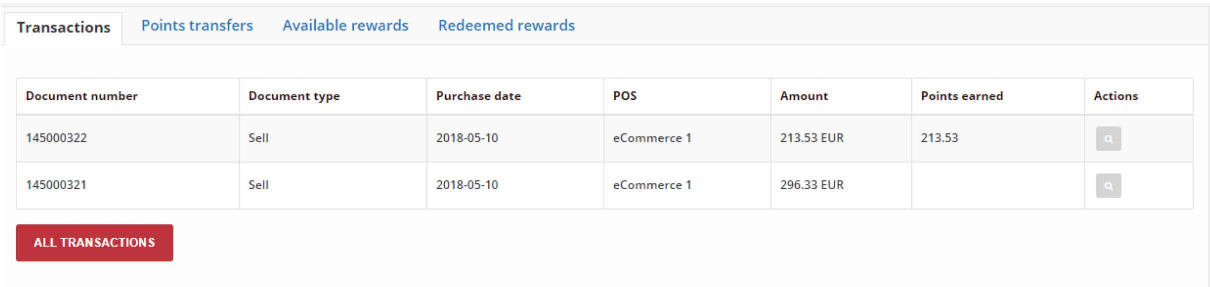
a. **CLV** (***Customer Lifetime Value)*** - the total amount of customer registered transactions

b. **AVO** (***Average Value of Order***) - the average amount of customer registered transactions

c. **Orders** **-** the total number of customer registered transactions (orders)within the Loyalty Program

Transactions

Transactions is a tab which contain latest transaction data such as type, place and date of transaction, value of earned points etc. linked with Customer:



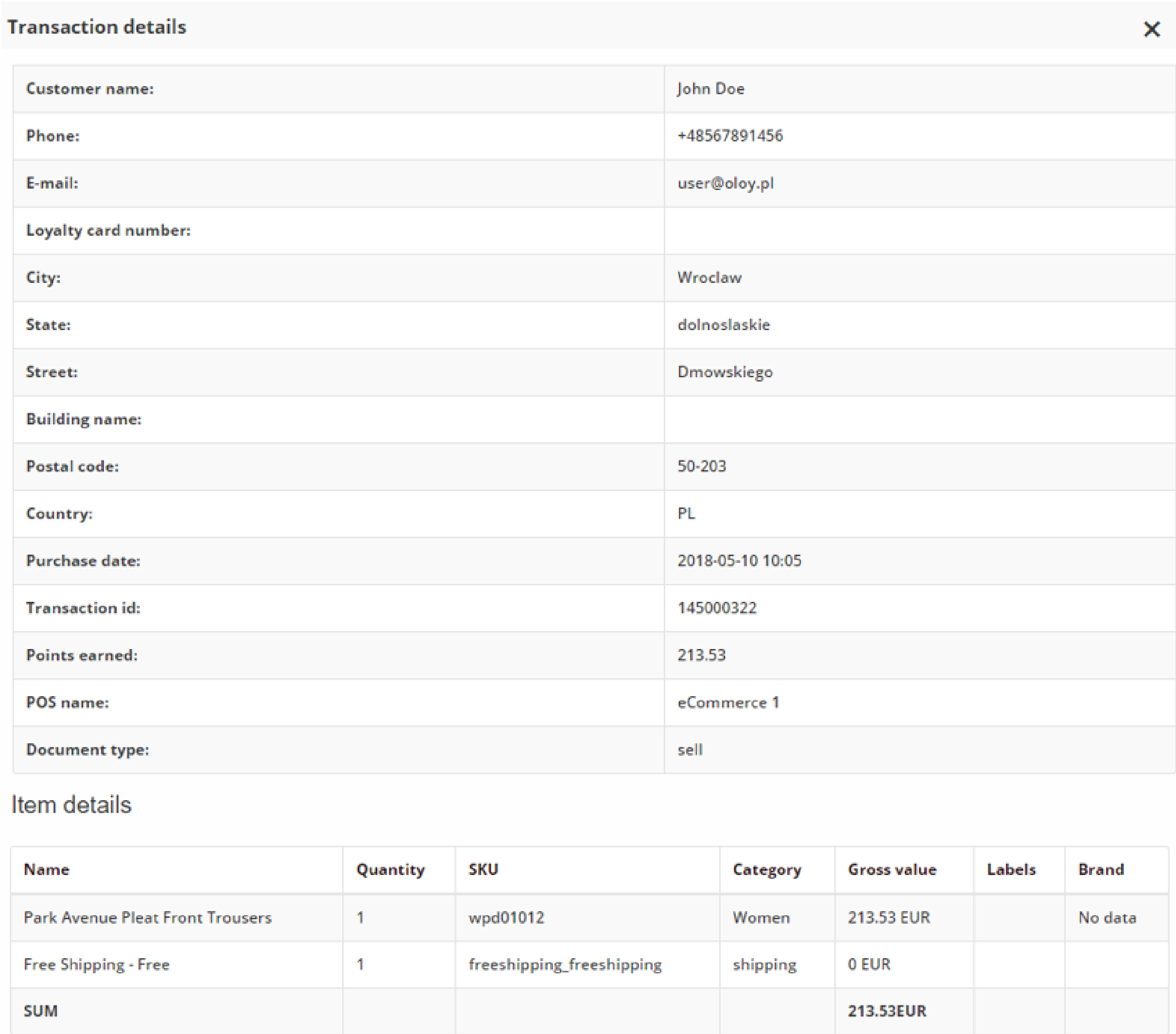
Transactions | Points transfers | Available rewards | Redeemed rewards

Document number	Document type	Purchase date	POS	Amount	Points earned	Actions
145000322	Sell	2018-05-10	eCommerce 1	213.53 EUR	213.53	
145000321	Sell	2018-05-10	eCommerce 1	296.33 EUR		

ALL TRANSACTIONS

Transactions view

Click **View** ( ) icon in the Action column to open the transaction details – customer detail information and purchased items.



Transaction details

Customer name:	John Doe
Phone:	+48567891456
E-mail:	user@oloy.pl
Loyalty card number:	
City:	Wroclaw
State:	dolnoslaskie
Street:	Dmowskiego
Building name:	
Postal code:	50-203
Country:	PL
Purchase date:	2018-05-10 10:05
Transaction id:	145000322
Points earned:	213.53
POS name:	eCommerce 1
Document type:	sell

Item details

Name	Quantity	SKU	Category	Gross value	Labels	Brand
Park Avenue Pleat Front Trousers	1	wpd01012	Women	213.53 EUR		No data
Free Shipping - Free	1	freeshipping_freeshipping	shipping	0 EUR		
SUM				**213.53EUR**		

Transaction Record Preview

To see the list of all your customer transaction (not only the latest) click **All Transactions** below the tab.

To learn more about Transactions, see **Transaction**

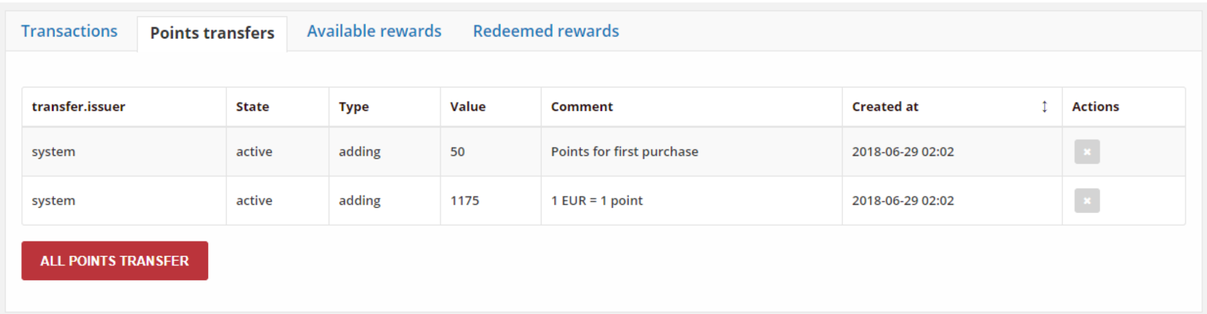
Field description

FIELD	DESCRIPTION
Document number	Unique transaction ID
Document type	Transaction type: • Sell – customer buy products • Return – customer return bought products

Purchase date	Date of transaction
POS	POS where transaction was made
Amount	Transaction amount
Points earned	How many points Customer earned/lose for this transaction (order). Transaction with the type "Sell" adds points, and "Return" subtracts
Actions	Open transaction record in view mode to see customers and purchased items details

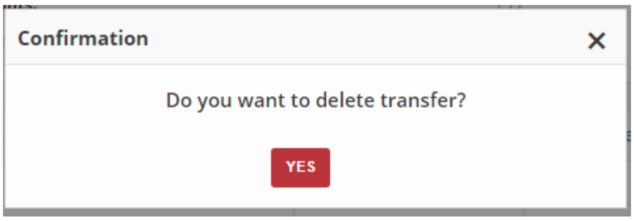
Points transfers

Points transfers tab provide a view of latest points which customer gain or spend. Moreover, list contains information whether points are the result of Earning Points Rules (system) or they have been manually set by the Admin user (admin).



Points Transfers Lists

To cancel points transfer click **Remove** ( ) icon in the Action column. System will display a message asked you to confirm the action.



Removing Transfer Action

After canceling, no action to canceled transfer record will be longer available and the **Remove** icon background change color to blue. The same situation deal with Points transfers with “spending” type.

To see the list of all your customer points transfers (not only the latest) click **All Points Transfer** below the tab.

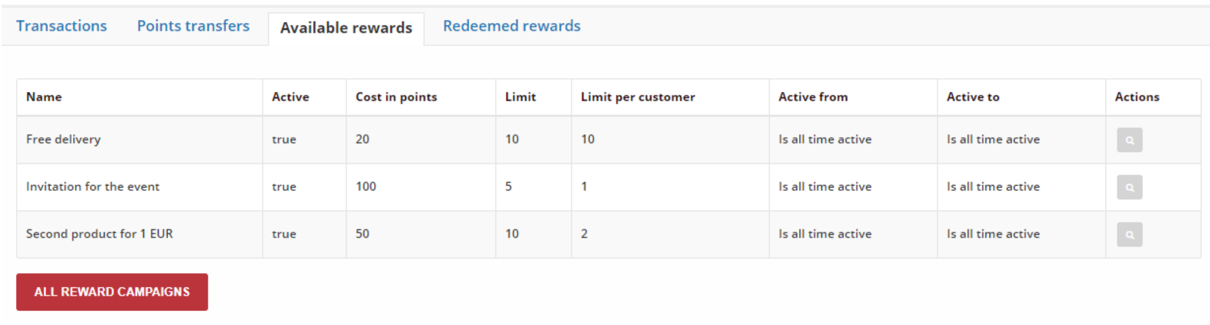
To learn more about Points transfers, see **Points transfer**

Field description

FIELD	DESCRIPTION
Issuer	Define who create Transfer operation. Options include: system/admin
State	Transferred points state: • Active - points are available to spend • Expired - points expired and can not be used to redeem reward • Canceled – points are subtracted from the pool of Active Points as a result of canceling the points transfer
Type	Transfer operation type: Adding/Spending
Value	Amount of points earned/spent within the transfer
Comment	Show details about transfer, e.g. for what customer gets points, for what customer spend points
Created at	Date when points transfer was made
Actions	The remove operations that can be applied to selected transfer record

Available rewards

Available rewards tab contain view of Reward Campaigns available for particular customer, including cost in points to redeem reward and dates when reward is available.



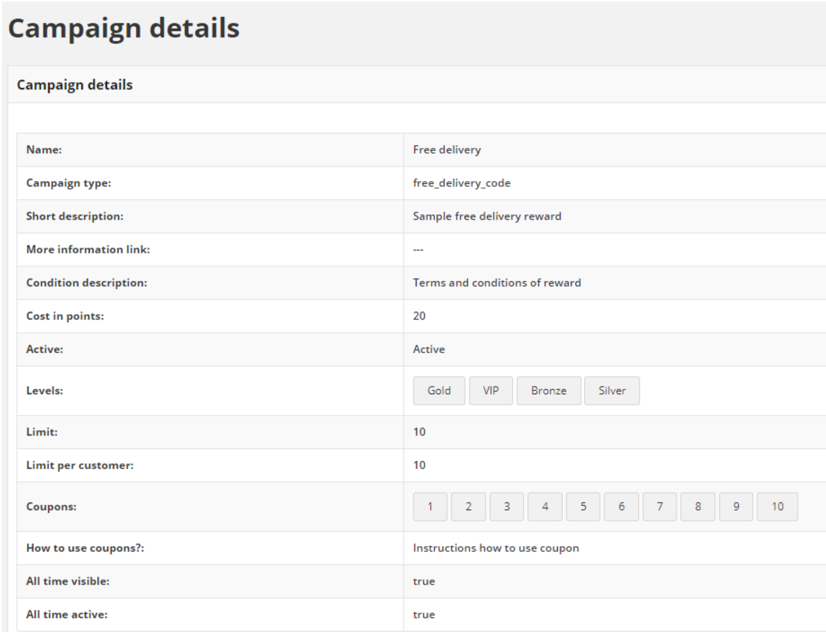
Transactions Points transfers **Available rewards** Redeemed rewards

Name	Active	Cost in points	Limit	Limit per customer	Active from	Active to	Actions
Free delivery	true	20	10	10	Is all time active	Is all time active	
Invitation for the event	true	100	5	1	Is all time active	Is all time active	
Second product for 1 EUR	true	50	10	2	Is all time active	Is all time active	

ALL REWARD CAMPAIGNS

Available Rewards

Click **View** ( ) icon in the Action column to open the Reward Campaign detail information



Reward Campaign Details

To see the list of all rewards available for customer within Loyalty Program click **All Reward Campaigns** below the tab.

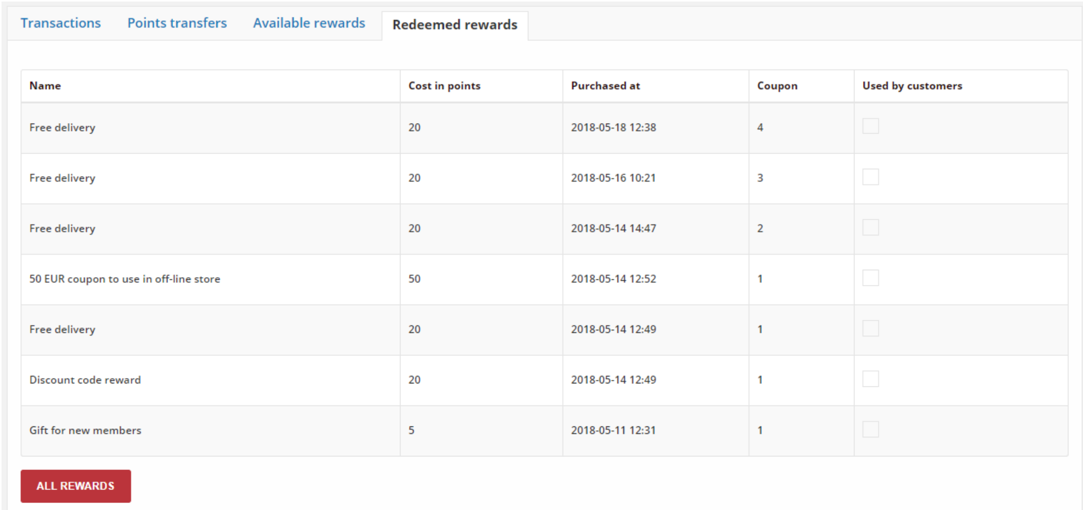
To learn more about rewards, see **Reward campaigns**

Field description

FIELD	DESCRIPTION
Name	Reward name, that is display to customer
Active	Determines whether the reward is available to customers. Option include: true/false
Cost in points	Define how much points customer must spend to redeem reward
Limit	Information about the redeem rewards limit globally. Is associated with Limit per customer value. For example, value 10 means that reward can be redeem only 10 times (by the same or different customers, what depends on Limit per customer value)
Limit per customer	Information about the redeem rewards limit by one customer. For example, value 1 means that reward can be redeem only once by one customer, value 2 twice etc.
Active from	Start date from which customer can redeem reward
Active to	End date until which customer can redeem reward
Actions	Open reward record in view mode to see reward campaign details

Redeemed rewards

Redeemed rewards tab provide information about rewards (Reward Campaigns) that customer has redeemed, divided into used and delivered.



Name	Cost in points	Purchased at	Coupon	Used by customers
Free delivery	20	2018-05-18 12:38	4	
Free delivery	20	2018-05-16 10:21	3	
Free delivery	20	2018-05-14 14:47	2	
50 EUR coupon to use in off-line store	50	2018-05-14 12:52	1	
Free delivery	20	2018-05-14 12:49	1	
Discount code reward	20	2018-05-14 12:49	1	
Gift for new members	5	2018-05-11 12:31	1	

Redeemed Rewards

All rewards that customer redeemed appears in this tab as a "*delivered*". Only when customer uses the reward/discount code during the purchase, reward is treated as "*used*".

When customer uses the reward checkbox in the **Used by customers** column is marked.

To indicate that customer has used the reward, Admin user can also manually marks the checkbox in **Used by customers** column.

To see the list of all redeemed rewards by customer within Loyalty Program click **All Rewards** below the tab.

To learn more about rewards, see **Redeemed rewards**

Field description

FIELD	DESCRIPTION
Name	Reward name, that is display to customer
Cost in points	Define how much points customer spent to redeem reward
Purchased at	The date when reward was redeemed
Coupon	Discount code that was used

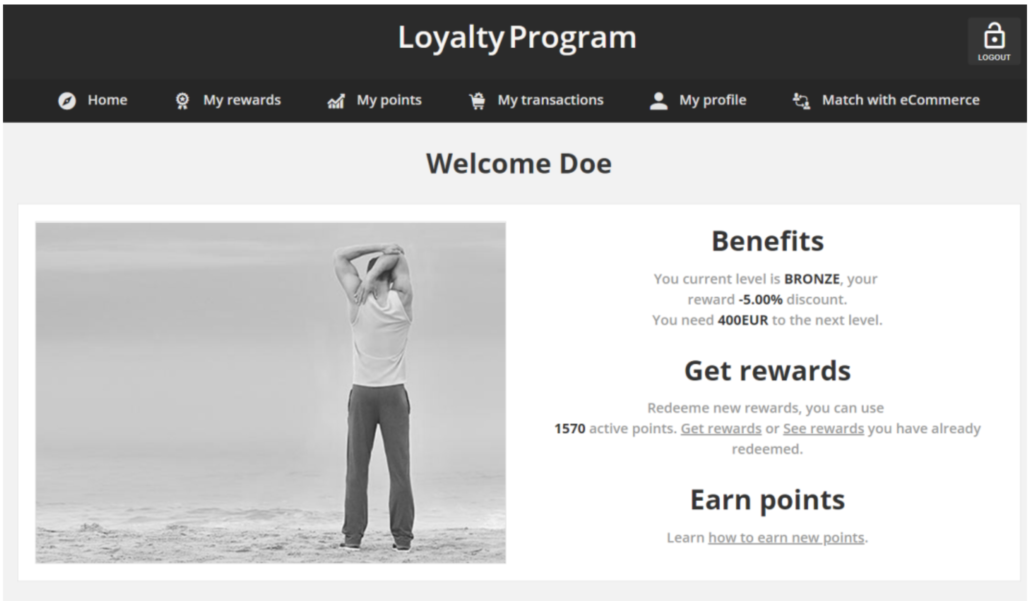
Used by customers	Define whether customer already used the reward or it’s only delivered and can be used by him

CHAPTER 7:

CUSTOMERS ACCOUNTS

The main page of your website can display message for customers to log in or register for an account with your Loyalty Program. Customers who open an account with your Loyalty Program enjoy a range of benefits.

Customers can access their account dashboard by clicking the link on your website. They can use their account to view and modify their personal information provided during registration process, check and redeem rewards , learn how to earn points, view their transaction history (offline and online) and history of points earned and spent.



Customer Account Home Page

Customer account activation

When customer complete registration form directly from the Client cockpit, depending on the settings, to activate the account he will receive:

a. **activation code** – when account activation method is selected to SMS. Activation code will be sent to his phone number provided in the form.

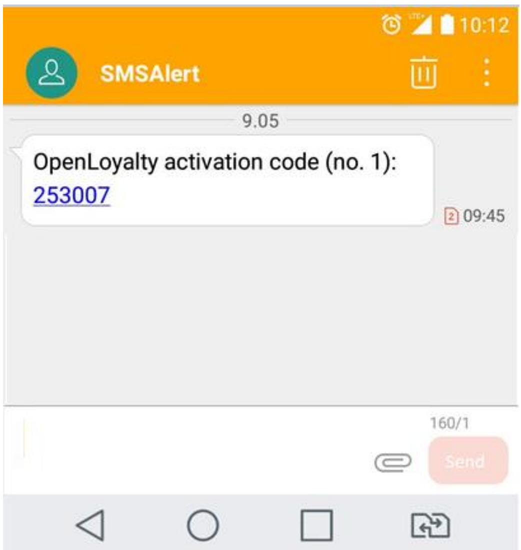
b. **activation link** – when account activation method is selected to E-mail. Link will be sent to his e-mail address provided in the form.

Remember, that in Open Loyalty settings you can choose only one Account activation method that will be used for all customer.

Note, if you register customer from Admin or POS Cockpit activation code or link is not sent. Customer account is active instantly.

Account activation via SMS

On the phone number provided by customer in the registration form activation code will be sent.

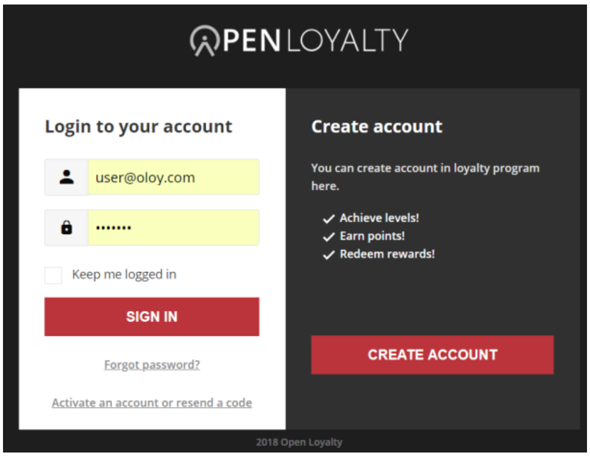


Account activation code SMS message

To activate customer account using SMS code:

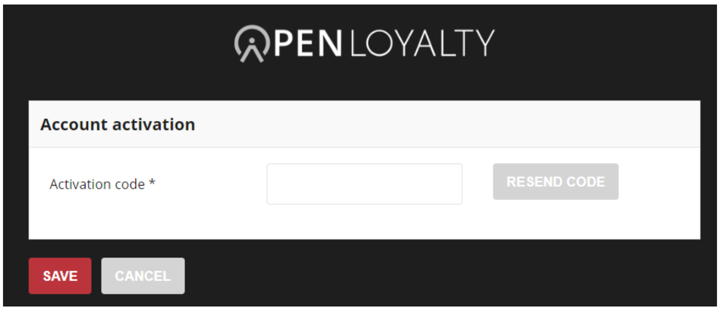
When customer receive that message, he needs to return on Login page and do as follow:

1. On the login page, tap **Activate an account or resend a code**



Login page

2. When prompted, in the Account activation window, enter the **Activation code** that received. Then tap **Save**

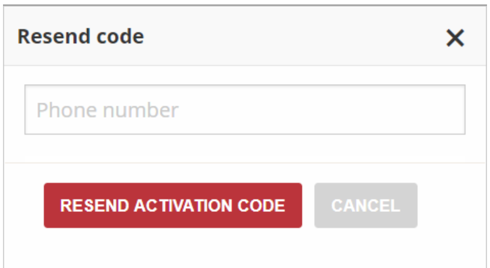


Customer account activation

If for some reason customer will lost this code he can simply resend an activation code.

To resend an activation code:

1. On the login page, tap **Activate an account or resend a code,** like in a previous step
2. When prompted, in the Account activation window, tap **Resend code**
3. Enter the **Phone number** on which another resend code will be sent. Phone number can be different than this one provided in registration form.

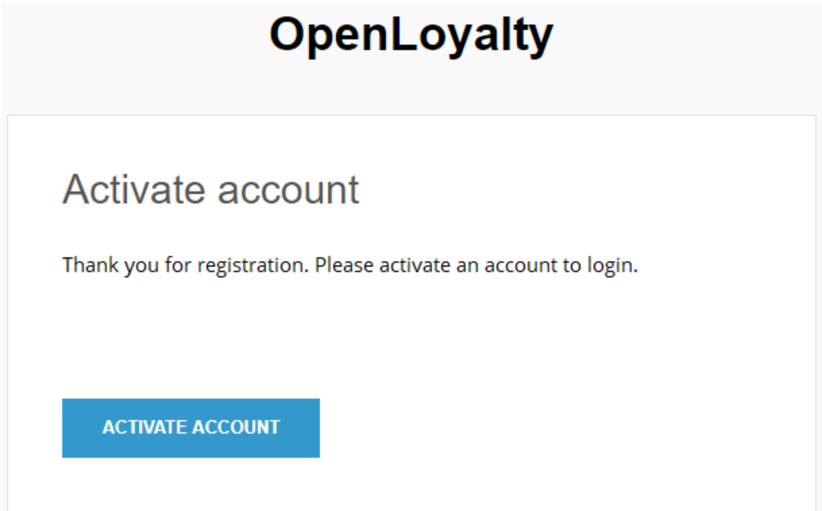


Resend code

4. When complete, tap **Resend activation code**

Account activation via E-mail

On the email address provided by customer in the registration form activation link will be sent.



Account activation link email message

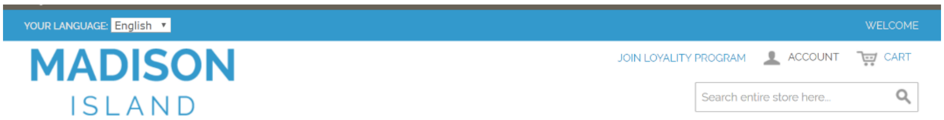
To activate customer account using link:

1. Click **Activate account** in the email message
2. Customer account will be activate instantly. Customer will be redirect automatically to login page to enter login credentials.

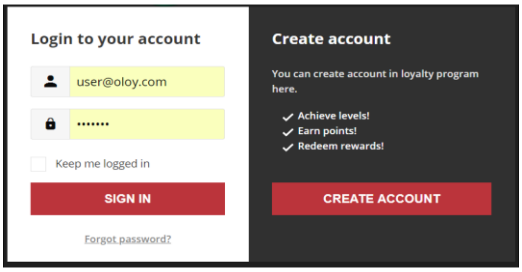
If for some reason customer will lost this email/link his account can be activated manually by Admin. To learn more about manually customer account activation please see **Deactivate a customer's account**

Customer Sign In

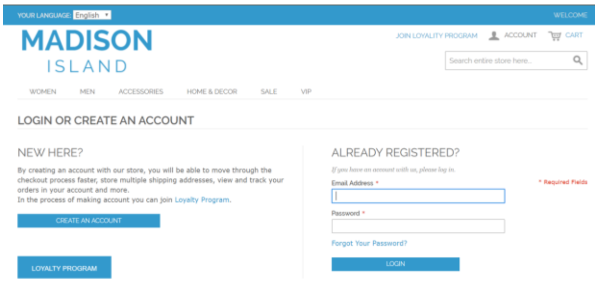
Customer have easy access to their account from main page of your website. Depending on the configuration, customers can be redirected to customer cockpit as subdomain (like club.yourbrand.com) or as loyalty module within your website.



Link to Loyalty Module within Webshop



Sign In to Customer Account within Subdomain



Sign In to Customer Account within Webshop

When customers forget their passwords, a reset link is sent to the email address that is associated with the account.

To sign in to your customer account:

1. Click a link on the website to open Login page
2. When prompted, enter the **Email Address/Phone number** that is associated with customer account, and **Password**. Then, tap **Sign In**

Depending on the configuration, customer can use to log in: E-mail address or Phone number and Password

To reset your customer account password:

1. On the Login page, tap **Forgot password?**
2. When prompted, enter the **Email Address** that is associated with your account, and tap **Recover Password**

If the email address you entered matches the one that is associated with the account, you will receive a "Password reset requested" email with a link to reset your password.

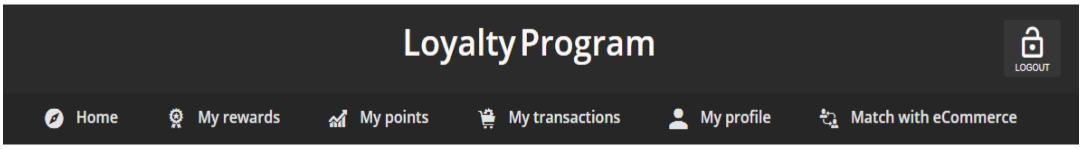
3. Click the **Reset Password link** in the email and enter your **New Password**. Enter it again to confirm.

Your password must be eight or more characters long, and contains at least one upper case letters, one numeric character and one special character

When you receive confirmation that the password is updated, you can use the new password to log in to your account.

To sign out of the customer account:

In the upper-right corner, tap the **Logout** () icon.

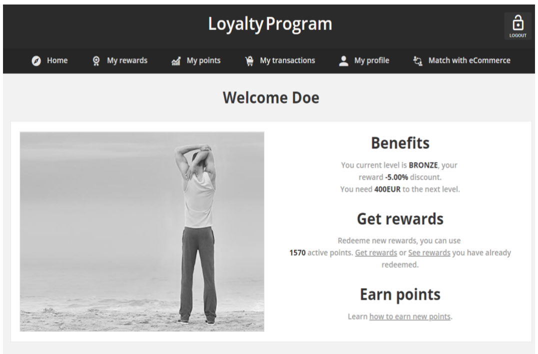


Logout

When customer logout, the Sign-In page returns.

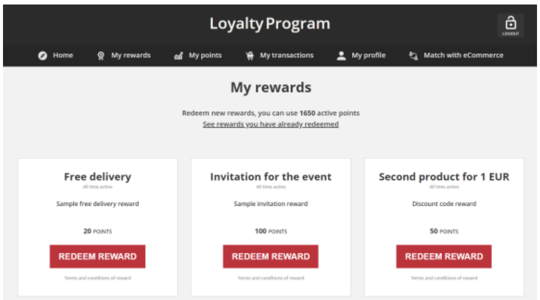
Customer Account

Customers through theirs account can view all their activity within Loyalty Program, and manage their own personal information.



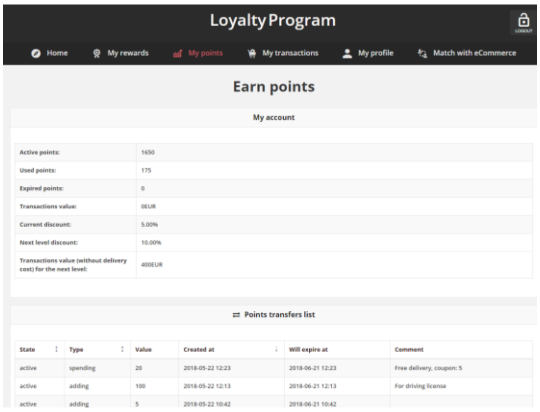
Home

The customer's Home page provides them the ability to view current level and assigned to this level reward, active points balance, points missing to next level and links to other areas of loyalty activities: redeem rewards, get more points, edit profile, check transaction, invite friend etc.



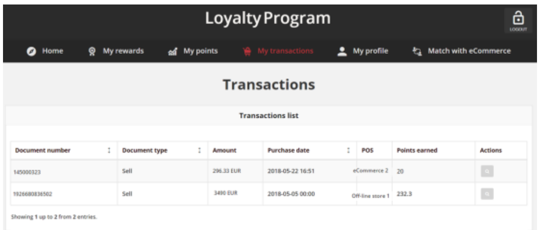
My rewards

Lists all available for customer account rewards with a link to see rewards he has already redeemed.



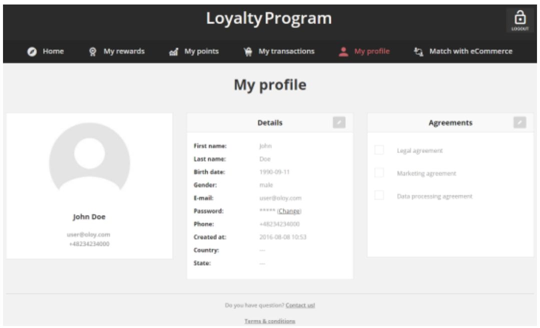
My points

Displays a loyalty points balance and levels details. Menu gives him also ability to track all points transfers with detail information regarding the date, point's state and type and reward (in case of transfers with "spending" type)



My transactions

Displays a list of all customer transaction, with a link to each to see more information – purchased items and transaction details.



My profile

Customers can update their account information and change their password as needed. The store Admin can also update **customer accounts.**

LEVELS

In this section of the guide, you will learn how to create and use customer levels to create opportunities for customer engagement and how to set up targeted discounts and rewards based on a variety of conditions. The more points customers receive, the higher level they'll reach. And, the higher level of loyalty, the more rewards customers will get.

You can use levels to offer customer incentives, such as:

- assigned a fixed reward to the particular level. The higher level – the better reward.
- offer limited in time special rewards for customer assigned to particular level

CHAPTER 8:

LEVELS MENU

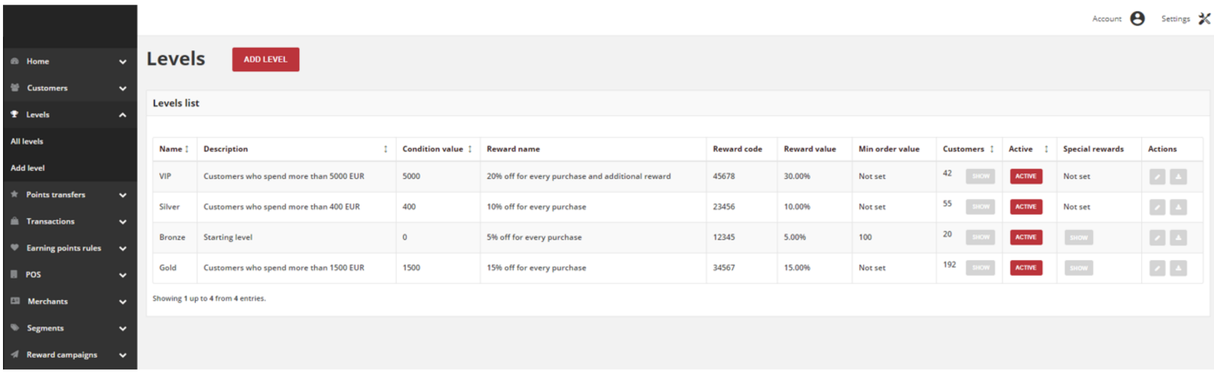
Levels are used to categorize customers based on the value of their transactions (orders) - The higher value/amount of transaction, the more points they will get and the higher level they'll reach.

Customer is assigned to only one level at a time. Customers are placed into a levels based either on their total amount of transaction or points they have earned. If customer has spent enough money or earned enough points to move up a level, his level will automatically move up and he will be informed about it via email.

The only scenario when customer can return to previous level is when order, which caused this promotion, will be returned.

Customer level can be also changed to higher or lower manually by the Admin user. If you move a customer to a level manually, they are excluded from any automatic levels upgrades or downgrades.

Each level can provide fixed discounts and also have exclusive rewards that can only be claimed when a customer is on that level.

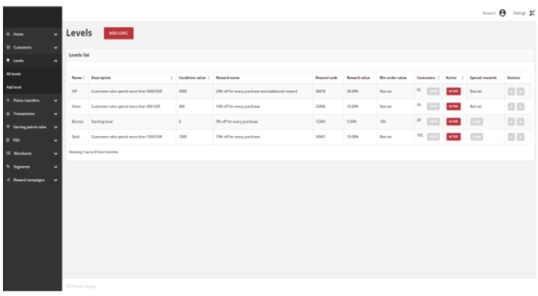


Customers Levels

To display the Levels menu:

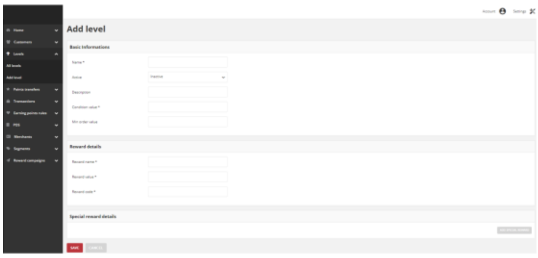
On the Admin sidebar, tap **Levels**, then choose **All levels**.

Menu options



All levels

Lists all customers level within your loyalty program with additional information regarding conditions values, assigned rewards and possible, limited in time, special rewards



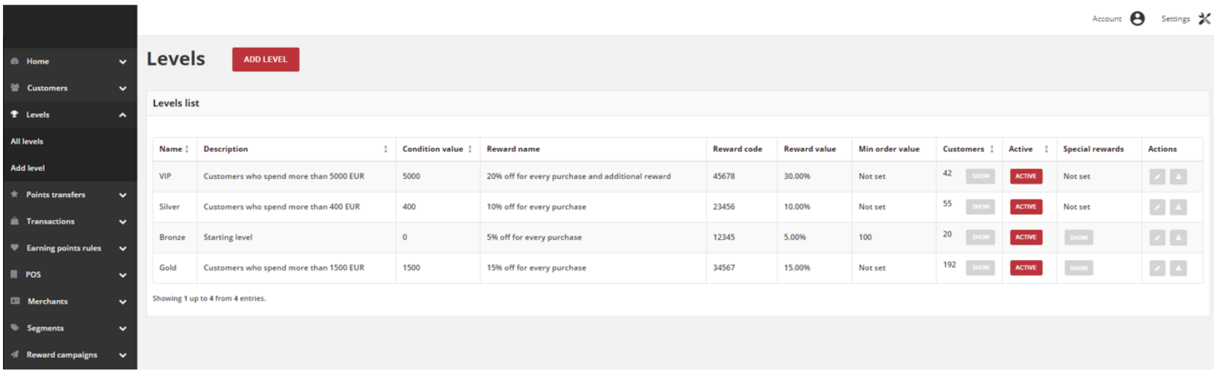
Add level

Lists all data that need to be filled out to add new customer level

All levels

The Levels page lists all customers levels available to reach within Loyalty Program. The same list is also visible from the Dashboard.

You can easily view and modify all levels credentials such as condition value, assigned rewards and special rewards. Tab allows also to preview number of customers assigned to particular levels and see theirs detail or download in .CSV file.



Customers Levels

Use the standard controls to sort the list and apply actions (modify and download targeted customer) to selected levels.

Field description

FIELD	DESCRIPTION
Name	Name of the Customer level, visible when information about level will be displayed
Description	Level brief description
Condition value	Minimum sum of earned points or sum of all transactions value needed to be assigned to this level
Reward name	Description of level reward (e.g. 5% discount).
Reward code	Discount code to be used on
Reward value	Discount value for this level (e.g. 5)
Min order value	Only when earned points for one transaction or one transaction value exceed provided value then it will be added to sum. If level has not defined Min order value then “Not set” will be shown.
Customers	Show customers account number assigned to this level. After **Show** click, list of these customer details will be shown.
Active	Action to change is Level active. Option include: Active/Inactive
Special rewards	Show Special Reward data related to Level, available when additional conditions will be met. If Level has not defined Special Reward then

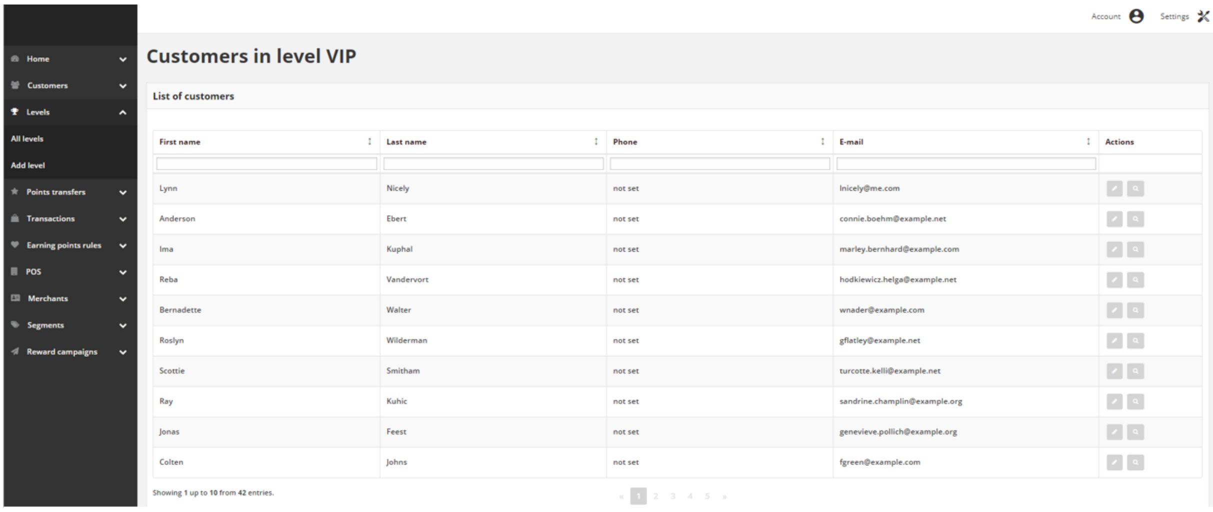
	"Not set" will be shown. To learn more about special rewards, see **special reward** section.
Actions	The operations that can be applied to selected customer record. Options include: • Edit level data • Download list of customers details assigned to this level

Customers assigned to level list

You can simply view not only the number but also the list of customers with details assigned to particular level.

To display the list of customers:

3. On the Admin sidebar, tap **Levels**. Then, choose **All levels**.
4. In the levels list, find the level you want to see customers list and click **Show** in the **Customers** column. After clicking, the list of customers will be opened, filtered according to the assigned level.



List of Customers in Level VIP

Use the standard controls to sort the list, filter and search customer by typing in the field under column header value you want to find, and apply actions to selected customers (edit and view). Pagination controls appear if there are more customer records than fit on the page, and are used to move from one page to the next.

Download the Customers list

There is also possibility to download a list of customers to a CSV file.

To download the list of customers assigned to a level:

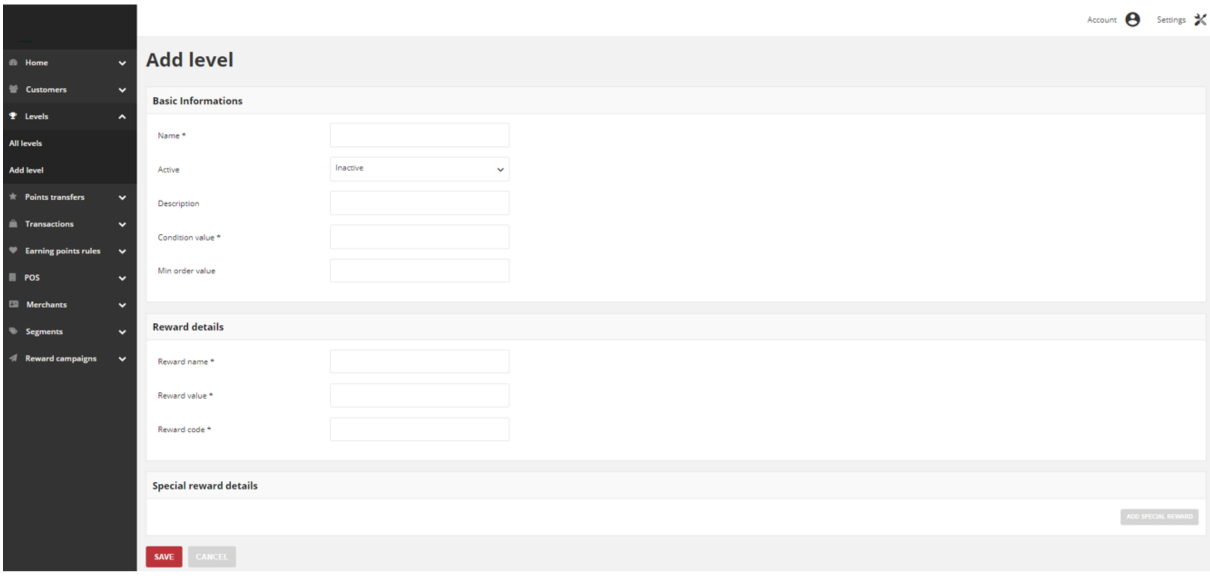
1. On the Admin sidebar, tap **Levels**. Then, choose **All levels**
2. In the levels list, find the level you want to download customers list and click **Download** ( ) icon in the **Action** column.

   After clicking, the list of customers will be download in .CSV format.

CHAPTER 9:

CREATING CUSTOMER LEVEL

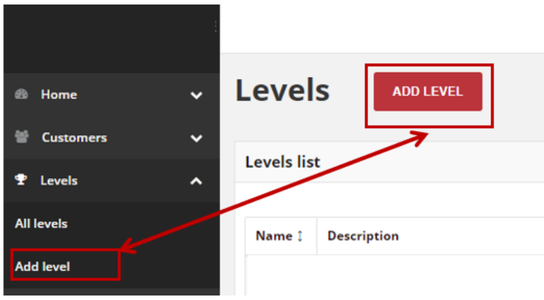
You can create unlimited amount customizable customers levels for your loyalty program based on various conditions.



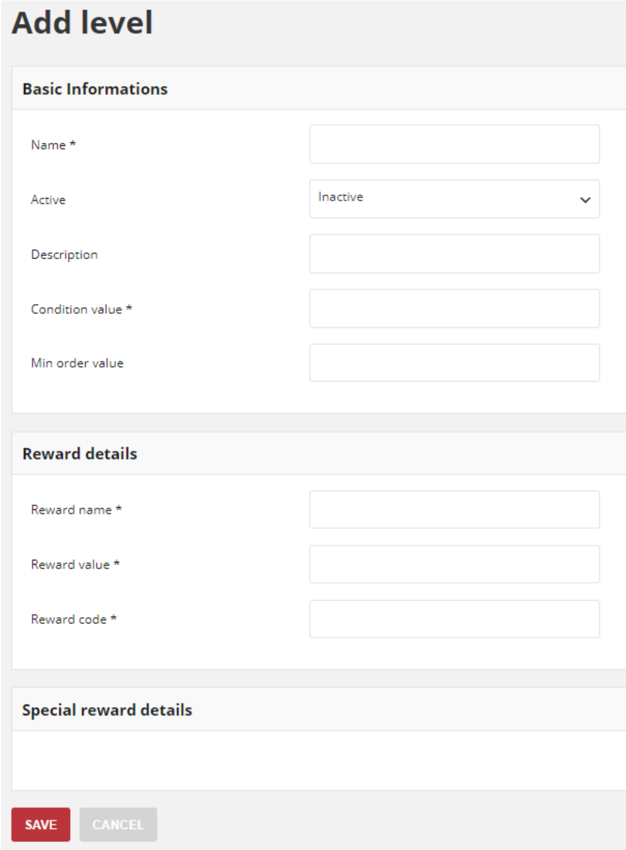
Add New Level

To create a New Customer Level :

3. On the Admin sidebar, tap **Levels**. Then, choose **Add level**. You can also add level directly from **All levels** list by clicking **Add level** at the top of the page.



Add Level Options



Add Level Form

4. In **Basic Information** section do the following:
    a. Enter a unique level **Name** to identify the customer level
    b. To activate the customer level, in **Active** field select "**Active**" from the dropdown list
    c. Enter a brief **Description** that explain purpose of the level for internal reference
    d. Depending on the configuration, set **Condition value** as a minimum points value or minimum transaction amount needed to be achieved to be assigned to this level

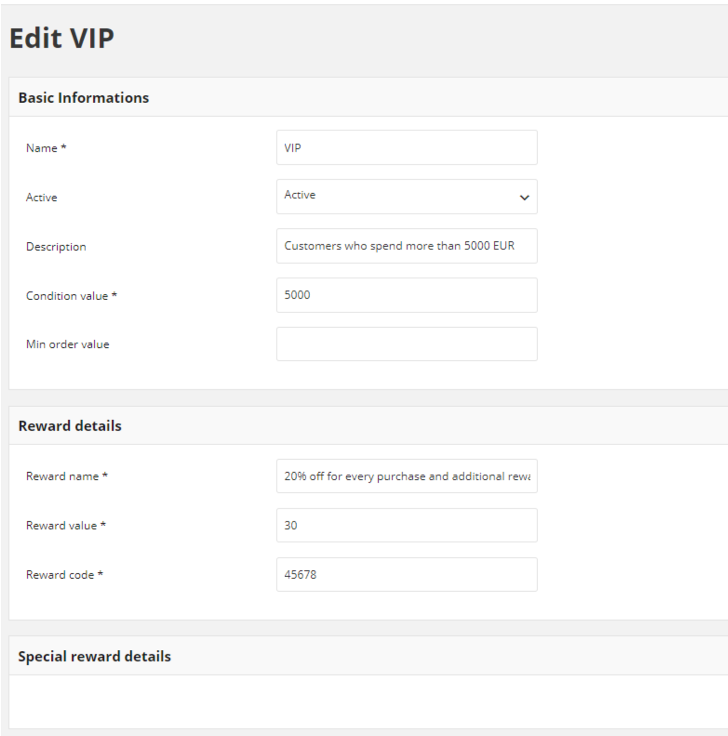
To check whether customer levels should be calculated based on points or transaction see Configuration settings

    e. If applicable, enter **Min order value** that need to be exceeded to add points/transaction value to sum.

5. In **Reward detail** section do the following:
   a. In **Reward name** provide a brief description that explain purpose of the reward. For example, 15% off for every purchase
   b. In **Reward value** field enter a discount value for level reward. For example, value 15 means 15% discount
   c. Enter a **Reward code** to be used by customers assigned to this level authorizing to **Reward value**.
6. If you want to give special discount for Customer but only in limited time, complete the **Special reward details** section. To learn how to assigned special reward to particular level, see **Special Rewards**
7. When complete, tap **Save**

Updating levels data

You can edit all data provided during level creation process. You can update level data by selecting it's record from **All levels** list.



Level Edition

To edit a level:

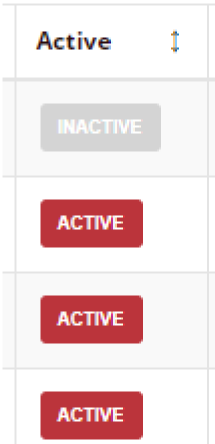
1. On the Admin sidebar, tap **Levels**. Then, choose **All levels**.
2. In the Levels list, find the record to be edited and click **Edit** ( ) icon in the Action column to open the record in edit mode.
3. Make any necessary changes to the level data
4. When complete, tap **Save**

Activate/deactivate a level

Any levels from the list can be activated and deactivated by Admin user.

To activate/deactivate level:

1. On the Admin sidebar, tap **Levels**. Then, choose **All levels**. You can also deactivate/activate level from **Edit mode**
2. In the levels list, find the level to be deactivated and click **Active** in the **Active** column. The button in the column change to ***Inactive*** and appear as a grey-out.



Active Column

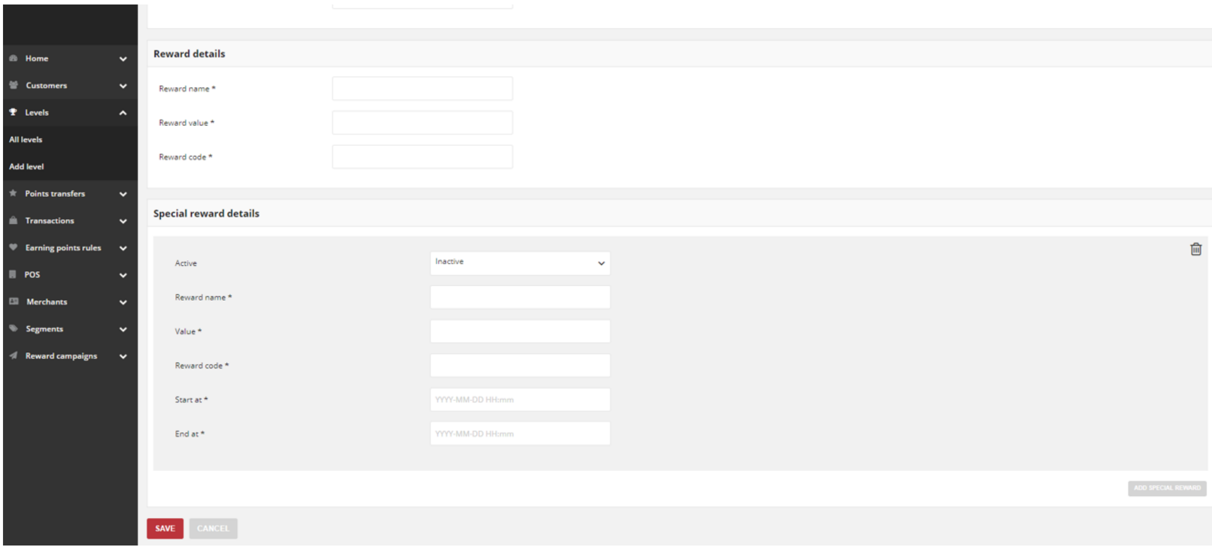
When you deactivate levels, customers accounts assigned to this level will be still display level name but redeeming rewards and special rewards assigned to this level will not be possible.

5. To activate the level click **Inactive** in the **Active** column. The button in the column change to ***Active*** and appears as a red.

Customer can be assigned only to Active levels

Special rewards

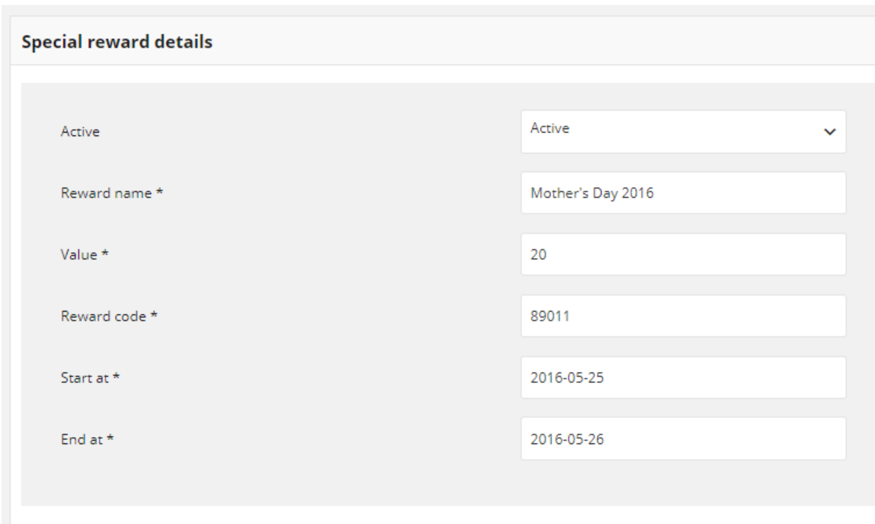
Special reward should be set if you want to give special discount for customer but only limited in time.



Add Special Reward

To assigned special rewards to level:

1. Open Add Level Form as described in previous point
2. Go to **Special reward details** section and click **Add special reward**. Then do the following:



Special Reward Details

a. To activate the level special reward, in **Active** field select “**Active**” from the dropdown list

b. Enter a **Reward name** as a brief description that explain purpose of the reward creation. For example, Woman’s day

c. Enter discount **Value** for special reward. For example, value 20 means 20% discount

d. Enter a **Reward code** to be used by customers assigned to this level authorizing to special reward **Value.**

e. In **Start at** and **End at** fields specify time boundaries when special reward will be visible and active.

3. Repeat the steps for all special rewards you want to assigned to this level
4. When complete, tap **Save**
5. You can simply remove special reward by clicking bin ( ) icon in a particular box

POINTS TRANSFERS

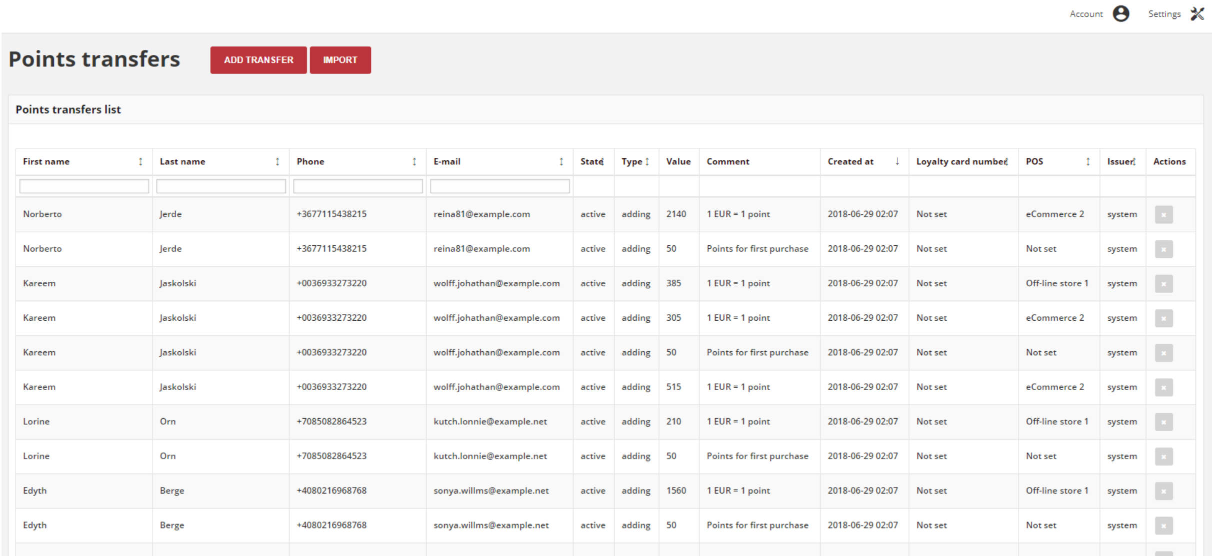
This section of the guide walks you through the basic points transfer information. You will learn how to add and manage transfer of loyalty points records and finally better understand all terms related to points transfer.

POINTS TRANSFERS MENU

CHAPTER 10:

POINTS TRANSFERS MENU

The Points Transfers section lists all – system and imported, increasing and decreasing sum of loyalty points assigned to customer account points transfers that has taken place between your customers account and Open Loyalty, and provides access to more detailed information.


Account Settings

Points transfers ADD TRANSFER IMPORT

Points transfers list

First name	Last name	Phone	E-mail	State	Type	Value	Comment	Created at	Loyalty card number	POS	Issuer	Actions
Norberto	Jerde	+3677115438215	reina81@example.com	active	adding	2140	1 EUR = 1 point	2018-06-29 02:07	Not set	eCommerce 2	system	
Norberto	Jerde	+3677115438215	reina81@example.com	active	adding	50	Points for first purchase	2018-06-29 02:07	Not set	Not set	system	
Kareem	Jaskolski	+0036933273220	wolff.johathan@example.com	active	adding	385	1 EUR = 1 point	2018-06-29 02:07	Not set	Off-line store 1	system	
Kareem	Jaskolski	+0036933273220	wolff.johathan@example.com	active	adding	305	1 EUR = 1 point	2018-06-29 02:07	Not set	eCommerce 2	system	
Kareem	Jaskolski	+0036933273220	wolff.johathan@example.com	active	adding	50	Points for first purchase	2018-06-29 02:07	Not set	Not set	system	
Kareem	Jaskolski	+0036933273220	wolff.johathan@example.com	active	adding	515	1 EUR = 1 point	2018-06-29 02:07	Not set	eCommerce 2	system	
Lorine	Orn	+7085082864523	kutch.lonnie@example.net	active	adding	210	1 EUR = 1 point	2018-06-29 02:07	Not set	Off-line store 1	system	
Lorine	Orn	+7085082864523	kutch.lonnie@example.net	active	adding	50	Points for first purchase	2018-06-29 02:07	Not set	Not set	system	
Edyth	Berge	+4080216968768	sonya.willms@example.net	active	adding	1560	1 EUR = 1 point	2018-06-29 02:07	Not set	Off-line store 1	system	
Edyth	Berge	+4080216968768	sonya.willms@example.net	active	adding	50	Points for first purchase	2018-06-29 02:07	Not set	Not set	system	

Points Transfers

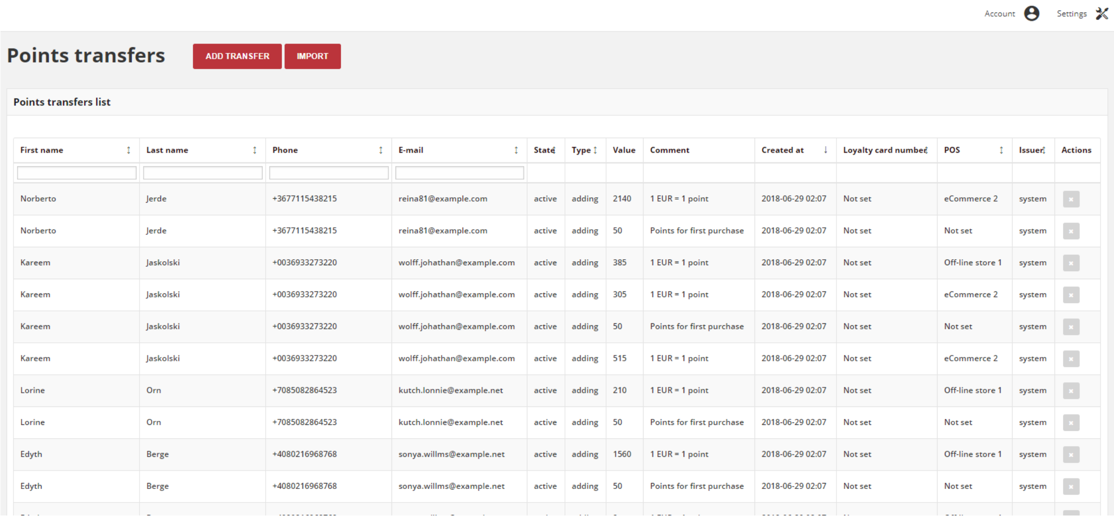
To display the Points Transfers menu:

On the Admin sidebar, tap **Points transfers** , then choose **All points transfers**.

All points transfers

The Points transfers lists gives you information about value of earned and spent points by particular customer with details regarding customers and transfer process. Moreover, list contains information whether points are the result of Earning Points Rules (system) or they have been manually set by the Admin user (admin).

To learn more about Earning Points Rule, see **Rules details**



Points Transfers List

Use the standard controls to sort the list, filter and search transfers by typing in the field under column header value you want to find, and apply actions to selected transfers records. Pagination controls appear if there are more transfer records than fit on the page, and are used to move from one page to the next.

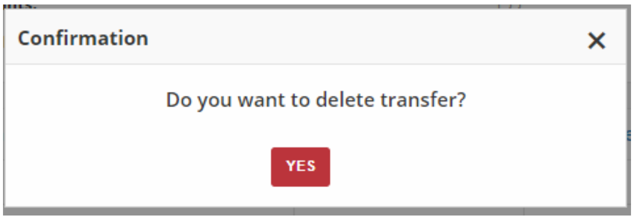
Field description

FIELD	DESCRIPTION
First name	The first name of customer referred to transfer
Last name	The last name of customer referred to transfer
Phone	The customer referred to transfer phone number
E-mail	The customer referred to transfer email address
State	Transferred points state: Active - points are available to spend Expired - points expired and cannot be used to redeem reward Canceled – points are subtracted from the pool of Active Points as a result of canceling the points transfer
Type	Transfer operation type: Adding – customer earn point for transaction or other activity Spending – customer spent points for campaign reward
Value	Amount of points earned/spent within the transfer
Comment	Show details about transfer, e.g. for what Customer gets points, for what Customer spend points. Field is automatically filled in with the reward campaign name when the customer spends points for the reward using his account.

	If transfer is created manually by Admin user, field is filled in with information provided by the Admin during transfer creation.
Created at	Date when points transfer was made
Loyalty card number	Customer loyalty card number linked with transfer
POS	Which of POS processed transaction upon which points were calculated
Issuer	Define who create Transfer operation. Option include: system/admin
Actions	The remove operations that can be applied to selected transfer record

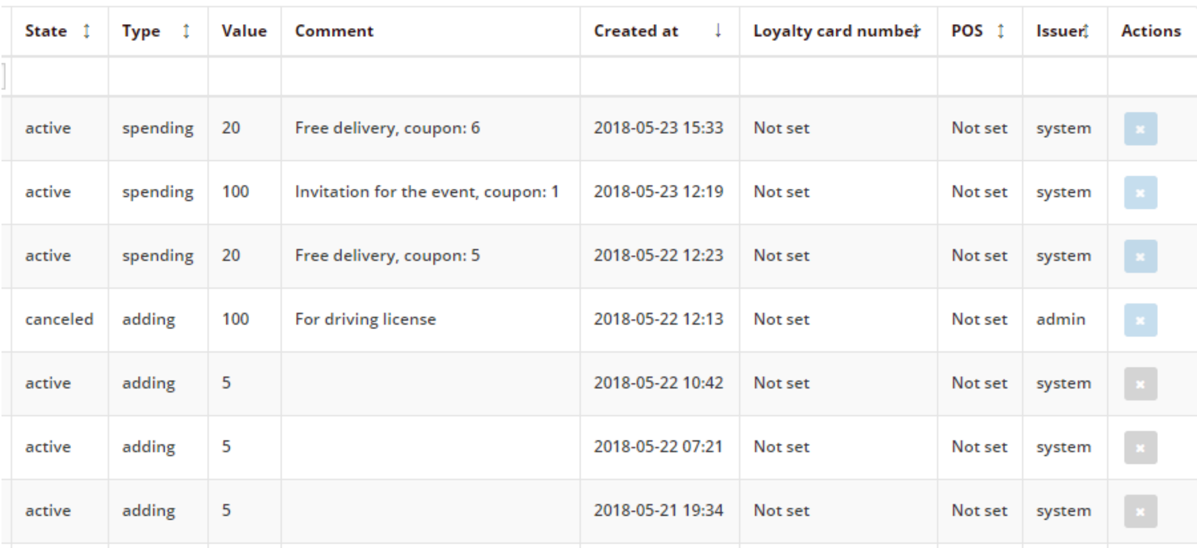
Deleting points transfer

To cancel points transfer click **Remove** ( ) icon in the Action column. System will display a message asked you to confirm the action.



Removing Transfer Action

After canceling, no action to canceled transfer record will be longer available and the **Remove** ( ) icon background change color to blue. The same situation deal with Points transfers with "spending" type.

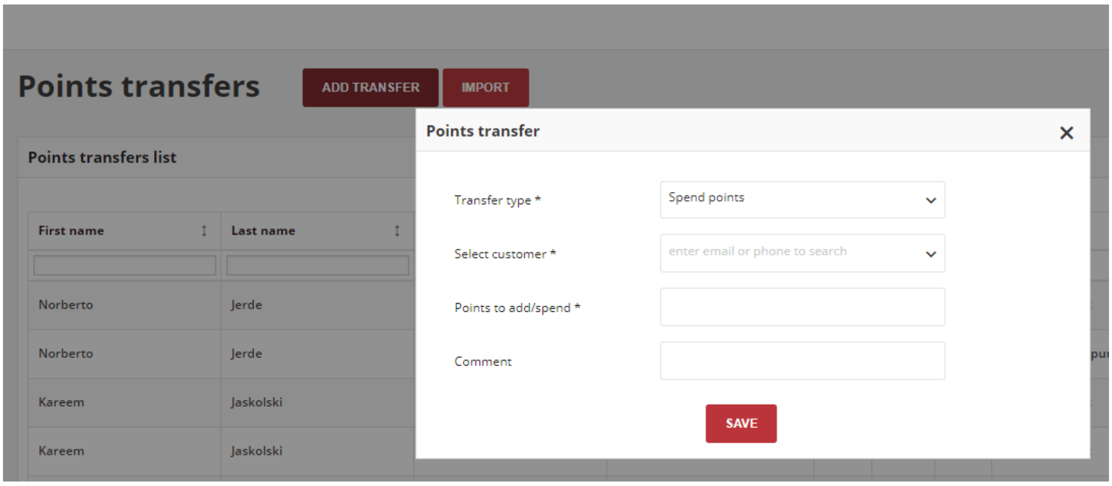


State	Type	Value	Comment	Created at	Loyalty card number	POS	Issuer	Actions
active	spending	20	Free delivery, coupon: 6	2018-05-23 15:33	Not set	Not set	system	
active	spending	100	Invitation for the event, coupon: 1	2018-05-23 12:19	Not set	Not set	system	
active	spending	20	Free delivery, coupon: 5	2018-05-22 12:23	Not set	Not set	system	
canceled	adding	100	For driving license	2018-05-22 12:13	Not set	Not set	admin	
active	adding	5		2018-05-22 10:42	Not set	Not set	system	
active	adding	5		2018-05-22 07:21	Not set	Not set	system	
active	adding	5		2018-05-21 19:34	Not set	Not set	system	

Deleting Transfers Icons

Creating points transfer

Customers usually earn and spend points within Open Loyalty system – points are added for transaction and activity based on Earning Points Rules and spent for Reward Campaigns selected by customer within customer cockpit . However, you can also create customer points transfer directly from the Admin, which is useful in case of ad-hoc special situation e.g. long delivery delay, the biggest purchase among customers in year etc.

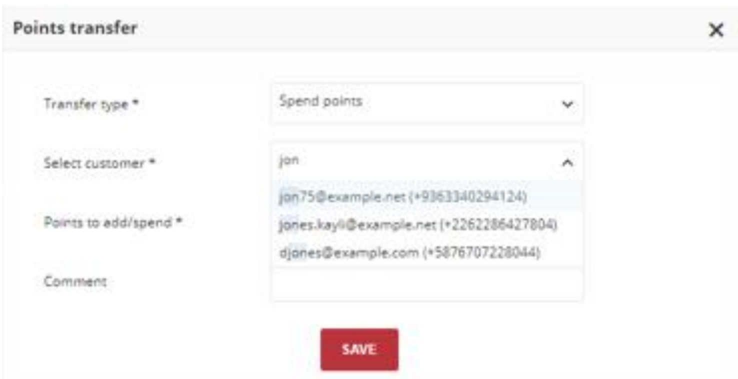


Add Points Transfer

To add points transfer manually:

1. On the Admin sidebar, tap **Points transfers**. Then, choose **All points transfers**
2. Tap **Add transfer** at the top of the page. Then, do the following:
   a. From the dropdown list choose **Transfer type:**
      - If you want to subtract points select ***Spend points***
      - If you want to add points select ***Add points***

   c. **Select customer** account for which points transfer will be deal with. Enter few letters/signs of customer name/surname/phone. System display the list of all matching customer record.



Select Customer

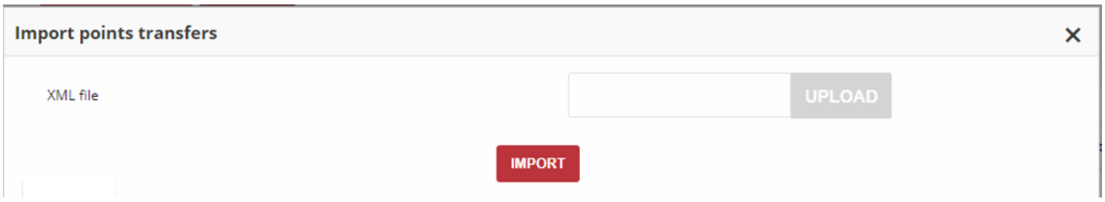
c. **In Points to add/spend field enter** amount of points that will be added to/ subtracted from Customer Account active Points

d. If needed, provide a **Comment** for operation as a brief description that explain purpose of the transfer e.g. information on what they were spent or why they were subtracted

3. When complete, tap **Save**

Import points transfers

If you have a customer list that you want to add points within your Loyalty Program, you can enter it into a Points transfer XML file and then import it in your Open Loyalty Admin.



Import Points Transfers

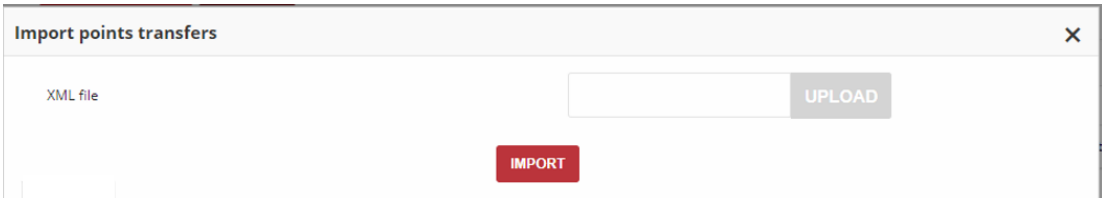
Importing a XML file will create a points transfers for each customer email address or phone number in the file.

To import a points from a file:

1. On the Admin sidebar, tap **Points transfers**. Then, choose **All points transfers**
2. Click **Import** at the top of the page, next to **Add transfer**

Points Import Button

3. In the **Import points transfers** dialog, click **Upload** and then choose your customer XML file.



Import Points Transfers

4. When file selected, click **Import**

The points transfers details of customers whose you've added to the XML file will appear in the All points transfers list in your Open Loyalty admin.

XML file structure

Example of Points transfer XML file structure below:

```
<?xml version="1.0" encoding="UTF-8"?>
<pointsTransfers>
  <pointsTransfer>
    <customerId>00000000-0000-474c-b092-b0dd880c07e2</customerId>
    <points>12</points>
    <type>adding</type>
  </pointsTransfer>
  <pointsTransfer>
    <customerId>00000000-0000-474c-b092-b0dd880c07e2</customerId>
    <points>50</points>
    <type>spending</type>
  </pointsTransfer>
</pointsTransfers>
```

TRANSACTIONS

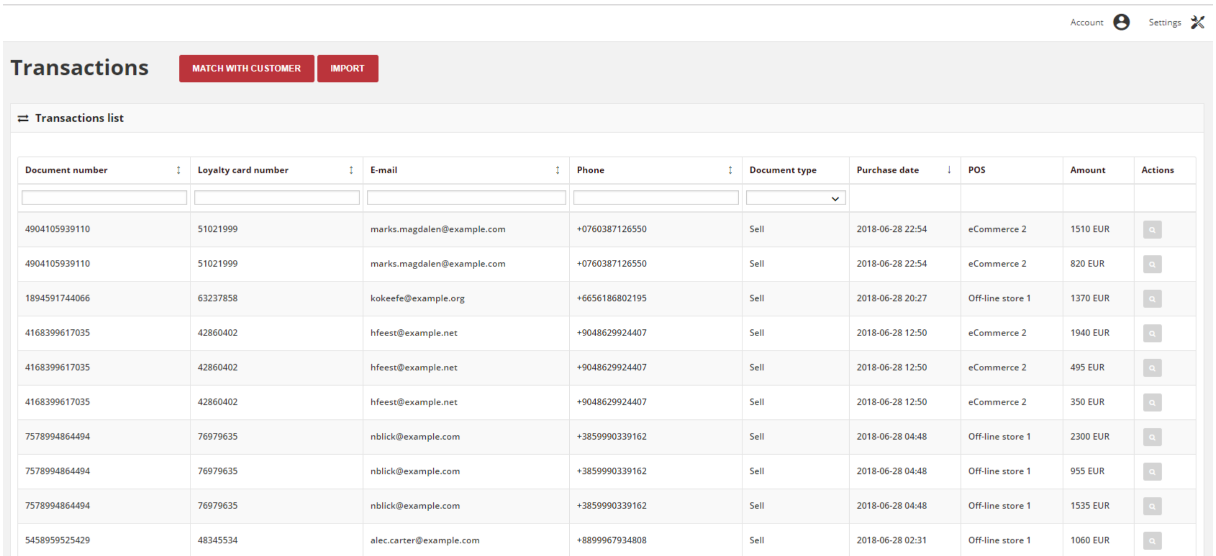
In this section of the guide, you'll learn how to manage all aspects of the transaction, including matching transaction with customer and better understanding of terms and transaction process.

TRANSACTIONS MENU

CHAPTER 11:

TRANSACTIONS MENU

The Transactions grid lists all (system and imported) payment activity that has taken place between your store system and customers, and provides access to more detailed information about purchased items and transaction itself.



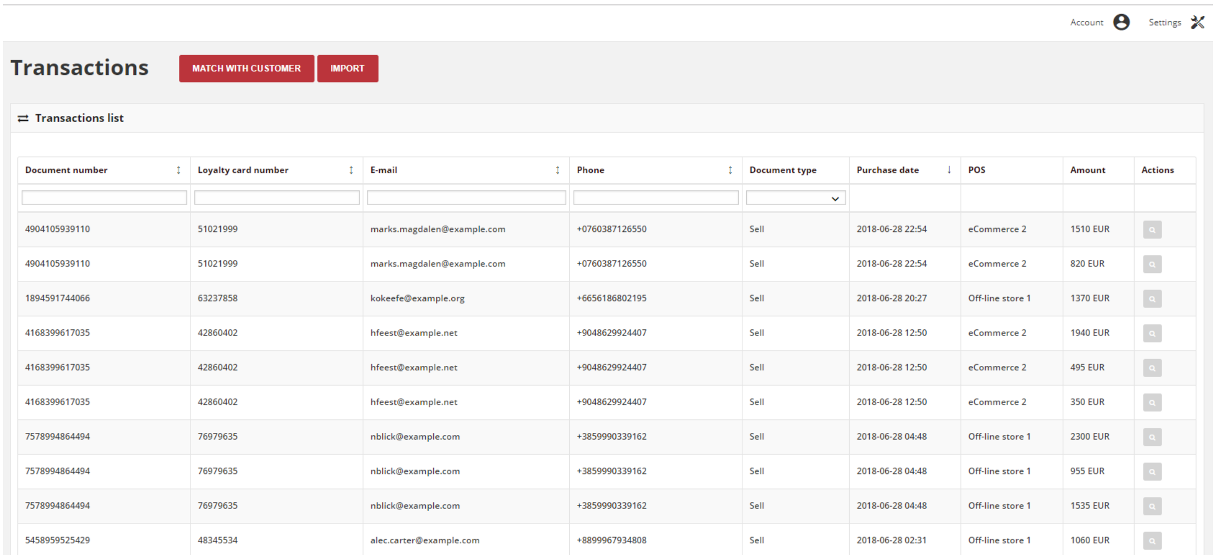
Transactions

To display the Transactions menu:

On the Admin sidebar, tap **Transactions** , then choose **All transactions**.

All transactions

The All transactions lists gives you information about type and value of all payment activity referred to customer. Moreover, list contains detail information about store and date when transaction was made, transaction internal number and allows to preview transaction and purchased items detail.



Document number	Loyalty card number	E-mail	Phone	Document type	Purchase date	POS	Amount	Actions
4904105939110	51021999	marks.magdalen@example.com	+0760387126550	Sell	2018-06-28 22:54	eCommerce 2	1510 EUR	
4904105939110	51021999	marks.magdalen@example.com	+0760387126550	Sell	2018-06-28 22:54	eCommerce 2	820 EUR	
1894591744066	63237858	kokeefe@example.org	+6656186802195	Sell	2018-06-28 20:27	Off-line store 1	1370 EUR	
4168399617035	42860402	hfeest@example.net	+9048629924407	Sell	2018-06-28 12:50	eCommerce 2	1940 EUR	
4168399617035	42860402	hfeest@example.net	+9048629924407	Sell	2018-06-28 12:50	eCommerce 2	495 EUR	
4168399617035	42860402	hfeest@example.net	+9048629924407	Sell	2018-06-28 12:50	eCommerce 2	350 EUR	
7578994864494	76979635	nblick@example.com	+3859990339162	Sell	2018-06-28 04:48	Off-line store 1	2300 EUR	
7578994864494	76979635	nblick@example.com	+3859990339162	Sell	2018-06-28 04:48	Off-line store 1	955 EUR	
7578994864494	76979635	nblick@example.com	+3859990339162	Sell	2018-06-28 04:48	Off-line store 1	1535 EUR	
5458959525429	48345534	alec.carter@example.com	+8899967934808	Sell	2018-06-28 02:31	Off-line store 1	1060 EUR	

Transactions List

Use the standard controls to sort the list by Purchase date, filter and search transfers by typing in the field under column header value you want to find, and apply action (preview) to selected transaction records. Pagination controls appear if there are more transaction records than fit on the page, and are used to move from one page to the next.

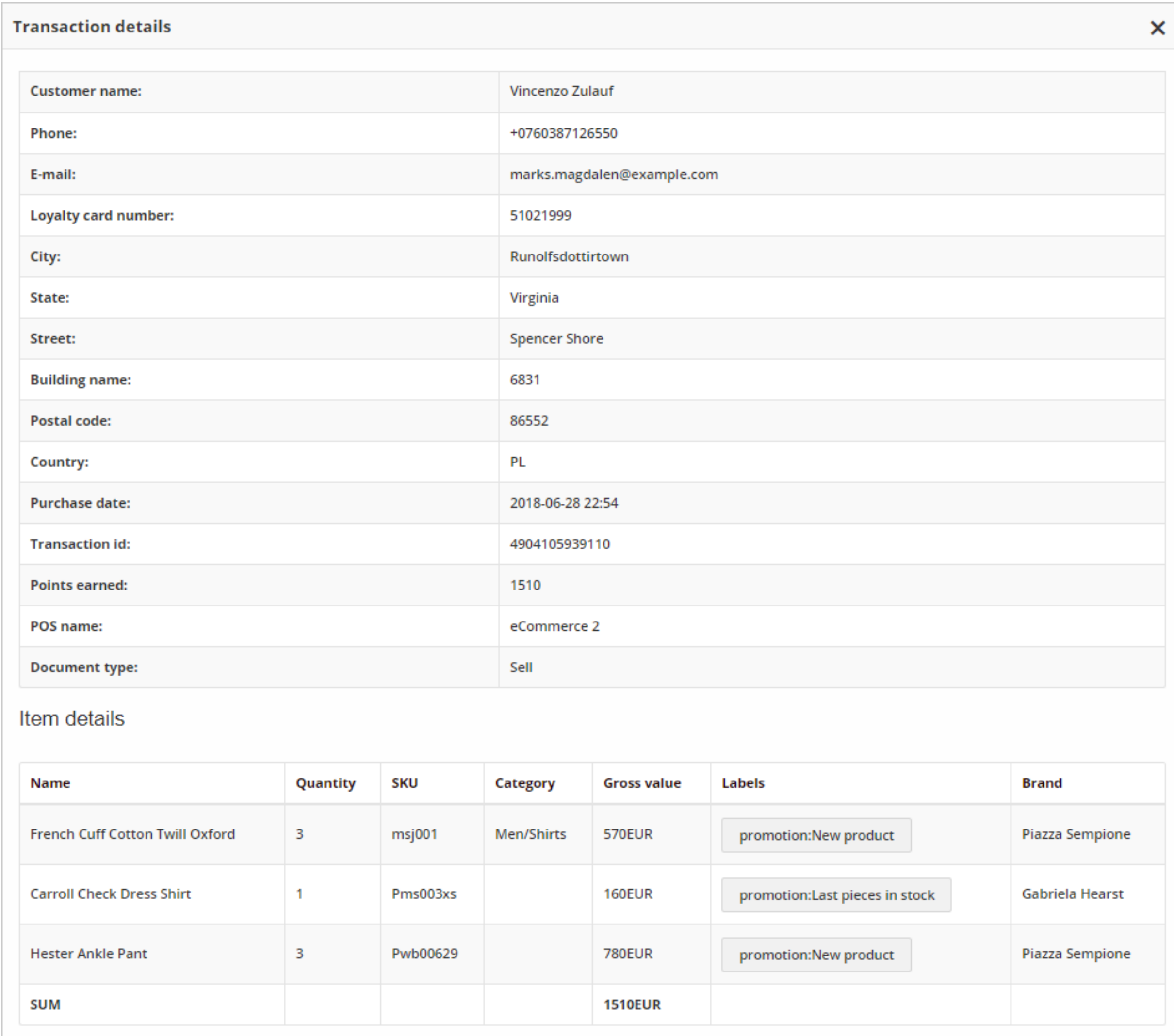
Field description

FIELD	DESCRIPTION
Document number	Unique transaction ID from your store internal system (e.g. e-commerce)
Loyalty card number	Number of customer loyalty card related to the transaction If transaction is linked with customer account
E-mail	Email address of customer related to the transaction
Phone	Phone number of customer related to the transaction
Document type	Transaction type: • Sell – customer buy products • Return – customer return bought products
Purchase date	Valid date of transaction
POS	POS where transaction was made
Amount	The amount of the transaction

Actions	Open transaction record in view mode to see customers and purchased items details

Transaction details

Click **View** ( ) icon in the Action column to open the transaction details – customer detail information and purchased items.



Transaction details

Customer name:	Vincenzo Zulauf
Phone:	+0760387126550
E-mail:	marks.magdalen@example.com
Loyalty card number:	51021999
City:	Runolfsdottirtown
State:	Virginia
Street:	Spencer Shore
Building name:	6831
Postal code:	86552
Country:	PL
Purchase date:	2018-06-28 22:54
Transaction id:	4904105939110
Points earned:	1510
POS name:	eCommerce 2
Document type:	Sell

Item details

Name	Quantity	SKU	Category	Gross value	Labels	Brand
French Cuff Cotton Twill Oxford	3	msj001	Men/Shirts	570EUR	promotion:New product	Piazza Sempione
Carroll Check Dress Shirt	1	Pms003xs		160EUR	promotion:Last pieces in stock	Gabriela Hearst
Hester Ankle Pant	3	Pwb00629		780EUR	promotion:New product	Piazza Sempione
SUM				**1510EUR**		

Transaction Record Preview

Field description

FIELD	DESCRIPTION
TRANSACTION DETAILS	
Customer name	First and last name of customer related to the transaction
Phone	Phone number of customer related to the transaction
Email	Email address of customer related to the transaction
Loyalty card number	Number of customer loyalty card related to the transaction If transaction is linked with customer account
City	The city where the customer resides at this address
State	The state or province of the customer at this address
Street	The street address of the customer
Building name	The name/number of a building or property where the customer resides at this address
Postal code	The postal code of the customer at this address
Country	The country where customer resides at this address
Purchase date	Valid date of transaction
Transaction ID	Unique transaction ID from your store internal system (e.g. e-commerce). The same value like in ***Document number*** field.
Points earned	How many points Customer earned/lose for this transaction (order). Transaction with the type "Sell" adds points, and "Return" subtracts
POS name	POS where transaction was made
Document type	Transaction type: • Sell – customer buy products • Return – customer return bought products
ITEM DETAILS	
Name	Bought product name
Quantity	Bought product quantity
SKU	Bought product SKU
Category	Bought product category
Gross value	Gross value of bought product
Labels	Bought product label, if assigned
Brand	Bought product brand, if assigned
SUM	Total amount of bought products within one transaction

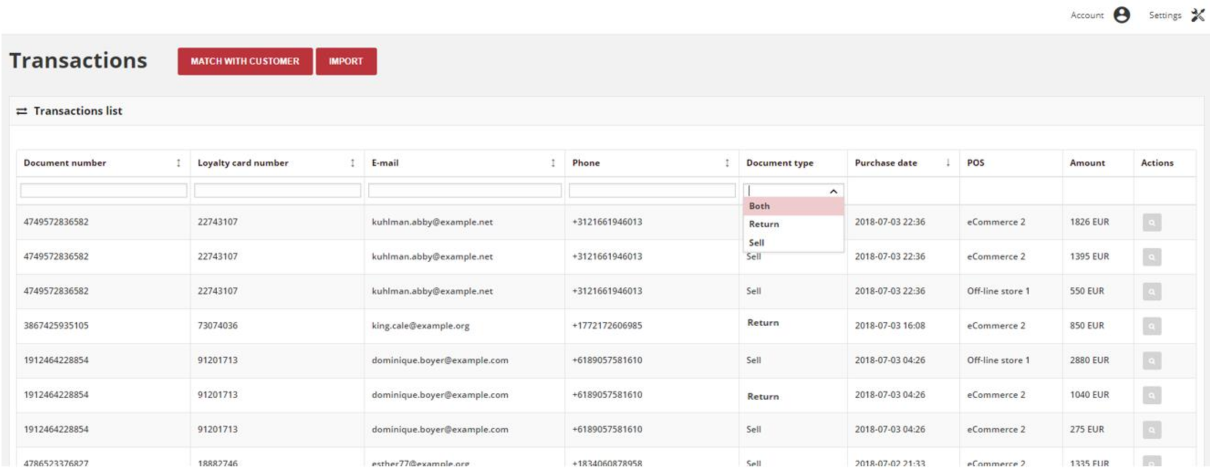
Returns

If for any reason the customer returns the purchased products and claims a refund a Return transaction is created. Customer can request a return from both, online and offline stores and both, partial or full refund. Typically, customer contacts the merchant to request a refund. If merchant authorize the return and agree for refund, a unique document number of related sell transaction is required to identify the returned products and sell transaction, that caused the points earned.

The **All transactions** menu lists all – return and sell transactions. To see only returns, you have to filter the list.

To display Return transactions:

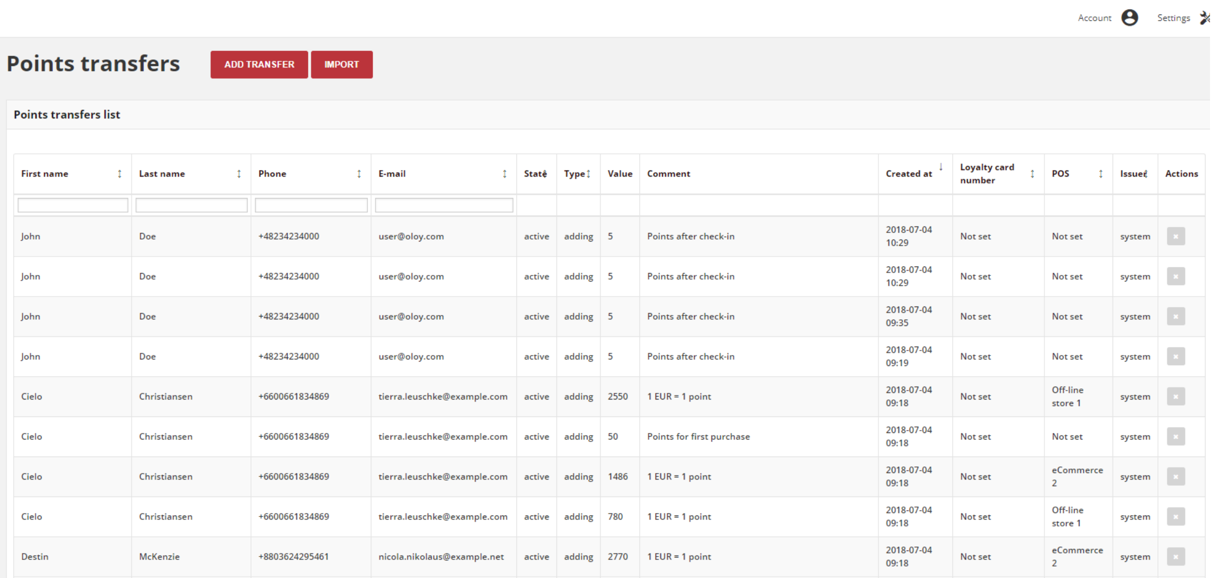
1. On the Admin sidebar, tap **Transactions**. Then, choose **All transactions.**
2. In the field under **Document type** column header, click on the arrow.
3. To see only returns, choose **Return** from dropdown list



Return and Sell Transactions Filter

When Returns are enable (see **Configuration** section), if the customer made a Return, in addition to subtracting the transaction value from the total value of transactions assigned to Customer, the number of earned points assigned to a given sell transaction is also reversed.

The reversed points will be listed in **All points transfers** menu with ***Type spending*** and information in ***Comment*** column, that they are result of return transaction.



First name	Last name	Phone	E-mail	State	Type	Value	Comment	Created at	Loyalty card number	POS	Issuer	Actions
John	Doe	+48234234000	user@oloy.com	active	adding	5	Points after check-in	2018-07-04 10:29	Not set	Not set	system	
John	Doe	+48234234000	user@oloy.com	active	adding	5	Points after check-in	2018-07-04 10:29	Not set	Not set	system	
John	Doe	+48234234000	user@oloy.com	active	adding	5	Points after check-in	2018-07-04 09:35	Not set	Not set	system	
John	Doe	+48234234000	user@oloy.com	active	adding	5	Points after check-in	2018-07-04 09:19	Not set	Not set	system	
Cielo	Christiansen	+6600661834869	tierra.leuschke@example.com	active	adding	2550	1 EUR = 1 point	2018-07-04 09:18	Not set	Off-line store 1	system	
Cielo	Christiansen	+6600661834869	tierra.leuschke@example.com	active	adding	50	Points for first purchase	2018-07-04 09:18	Not set	Not set	system	
Cielo	Christiansen	+6600661834869	tierra.leuschke@example.com	active	adding	1486	1 EUR = 1 point	2018-07-04 09:18	Not set	eCommerce 2	system	
Cielo	Christiansen	+6600661834869	tierra.leuschke@example.com	active	adding	780	1 EUR = 1 point	2018-07-04 09:18	Not set	Off-line store 1	system	
Destin	McKenzie	+8803624295461	nicola.nikolaus@example.net	active	adding	2770	1 EUR = 1 point	2018-07-04 09:18	Not set	eCommerce 2	system	

Points Transfer as a Result of Return Transaction

After the return, points are subtracted from the pool of Active points, according to the number of points earned within sell transaction and in proportion to the amount of transaction.

Points are not reversed according to points earned for bought specific products but in proportion to the all transaction amount (including all bought products)

For better understanding please see Example below

Example:

Your customer transaction value is 40 € and include following products:

- *Product A – 10 €*
- *Product B – 10 €*
- *Product C – 20 €*

For following transactions and purchase of these products your customer has earned the value of points as below:

- *Product A – 10 points (for bought specific products)*
- *Product B – 20 points (for bought specific product)*
- *Product C – 0 points*
- *40 points for total transaction value (1€ spend = 1 point earned)*

*So in total customer spent 40 € and earned 70 points. Points were added to his **Active points** pool, and transaction value to total amount of his registered transaction value (**CLV** attribute).*

For some reason, he decided to return Product C, which cost 20 €, which is a half of the total transaction value.

*And exactly in the same proportion will be calculated the value of points that will be subtracted. For this transaction he earned 70 points, so half of them – 35 points will be subtracted from the **Active points** pool.*

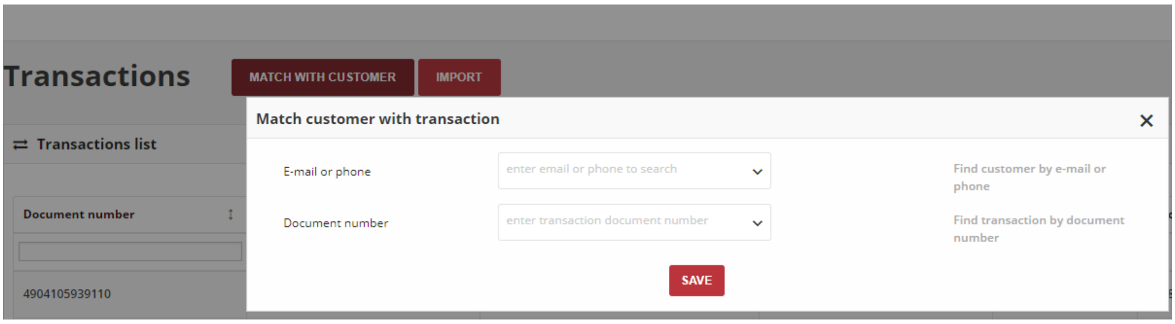
Note, that the transaction value also affects to the **Levels** and **Segments**, which criteria are based on this value. Customer can return to previous level or not be included in a given segment when transaction, which caused this promotion, will be returned.

For more information please see **Levels** and **Segments** chapters.

Match transaction with customer

Usually, transaction come from your store system with information about customer related with. However, you can link transaction with Customer Account directly from the Admin in Open Loyalty, which is useful when you send to Open Loyalty only transactions.

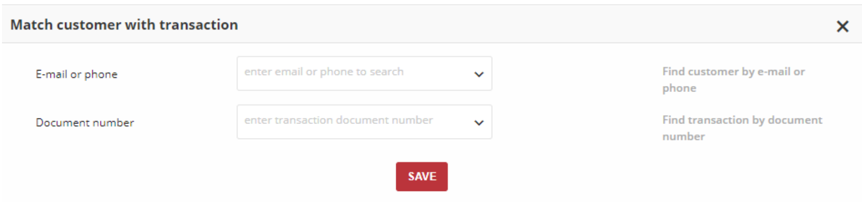
Depending on Matching transaction with customer identification factors priority (set up in Configuration) customer email, phone number or/and loyalty card number can be used. To remain about identification factors please see **Configuration**



Match Customer Account with Transaction

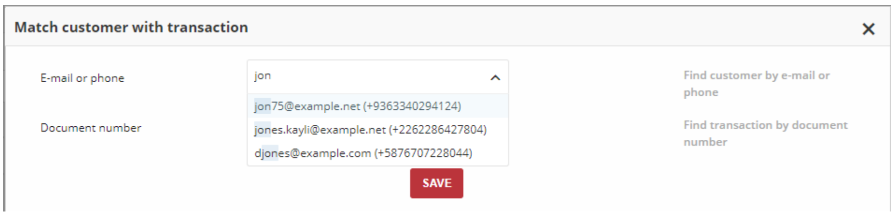
To match transaction with customer:

4. On the Admin sidebar, tap **Transactions**. Then, choose **All transactions.**
5. Tap **Match with customer** at the top of the page. Then, do the following:



Matching Transaction

   a. Enter **E-mail or phone** to find customer, which you want to associate with the transaction



Matching Customer List

b. Enter transaction **Document number** (transaction ID), which you want to associate with the customer

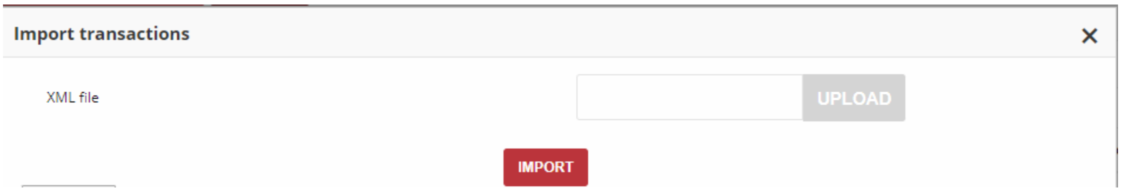
c. In the both fields:

- To find a close match, enter few letters/signs of what you want to find
- To find an exact match, enter the exact word/number you want to find.

3. When complete, tap **Save**

Import transactions

If you have a transaction that you want to add within your Loyalty Program, you can enter it into a transactions XML file and then import it in your Open Loyalty Admin.

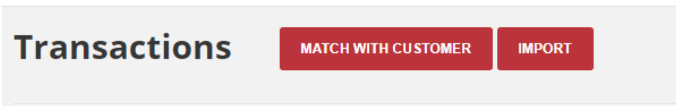


Import Transactions

Importing a XML file will create a transactions for each record in the file.

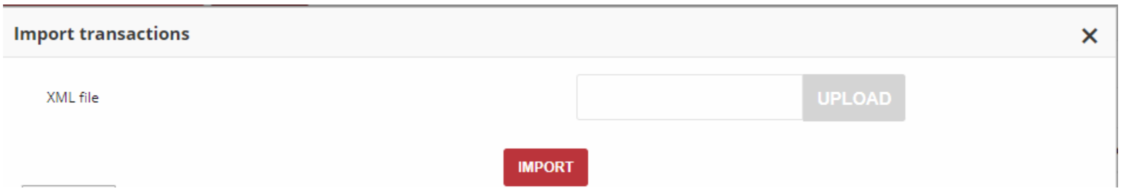
To import a transaction from a file:

1. On the Admin sidebar, tap **Transactions**. Then, choose **All transactions**
2. Click **Import** at the top of the page, next to **Match with customer**



Transactions Import Button

3. In the **Import transactions** dialog, click **Upload** and then choose your customer XML file.



Import Transactions

4. When file selected, click **Import**

The transactions records which you've added to the XML file will appear in the All transactions list in your Open Loyalty admin

XML file structure

Example of Transaction XML file structure below:

```
<?xml version="1.0" encoding="UTF-8"?>
<transactions>
  <transaction>
    <documentNumber>1111.6</documentNumber>
    <purchasePlace>Wroclaw</purchasePlace>
    <purchaseDate>2018-08-15T15:52:01+00:00</purchaseDate>
    <documentType>sell</documentType>
    <posId>00000000-0000-474c-1111-b0dd880c07e2</posId>
    <customer>
      <name>John Doe</name>
      <email> jdoe@example.com</email>
      <nip>123-12-22-123</nip>
      <phone>48231231232</phone>
      <loyaltyCardNumber>12982332</loyaltyCardNumber>
      <address>
        <street> Main road</street>
        <address1>123</address1>
        <city>Wroclaw</city>
        <country>PL</country>
```

```xml
    <province>Dolnoslaskie</province>
    <postal>45-123</postal>
  </address>
</customer>
<items>
  <item>
    <sku>
      <code>SKU1</code>
    </sku>
    <name>Item 1</name>
    <quantity>1</quantity>
    <grossValue>100</grossValue>
    <category>category1</category>
    <maker>maker</maker>
    <labels>
      <label>
        <key>key1</key>
        <value>value1</value>
      </label>
    </labels>
  </item>
  <item>
    <sku>
      <code>SKU2</code>
    </sku>
    <name>Item 2</name>
    <quantity>3</quantity>
    <grossValue>300</grossValue>
    <category>category2</category>
    <maker>maker</maker>
    <labels>
      <label>
```

```xml
                <key>key3</key>
                <value>value3</value>
            </label>
        </labels>
    </item>
  </items>
</transaction>
```

EARNING POINTS RULES

This section of the guide provides an overview of the ways for customers to earn points – the engine of your Loyalty Program. You'll learn how to create and manage Earning Points Rule to accomplish many things, from rewarding high-value customers, to stopping points earning all together.

CHAPTER 11:

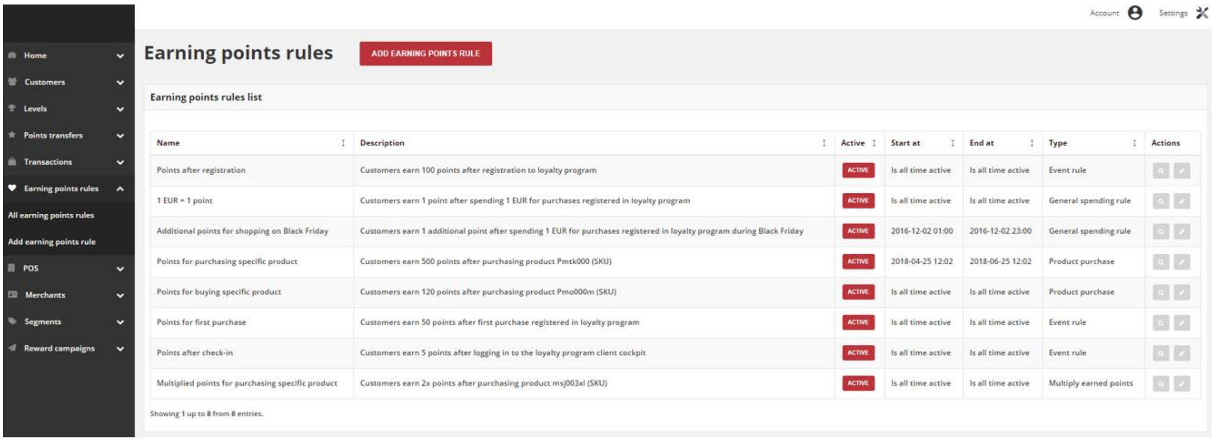
EARNING POINTS RULES MENU

Earning Points Rule define ways and conditions for customers to earn points.

Points can be awarded for a wide range of transaction and customer activities, and the configuration can be set to control the point allotment, balance, and expiration.

You can add point multipliers, eligibility criteria and even exclude certain products or customers.

Customers can redeem points toward rewards, based on the condition (points cost) that you establish.

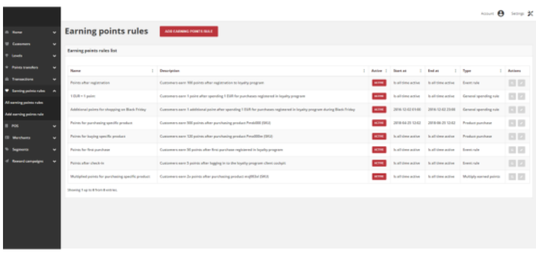


Earning Points Rules

To display the Earning Points Rules menu:

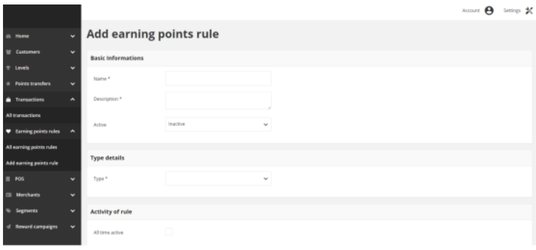
On the Admin sidebar, tap **Earning points rules** , then choose **All earning points rules**.

Menu options



All earning points rules

Lists all Earning Points Rules within your loyalty program with additional information regarding it’s activity, conditions and general information.

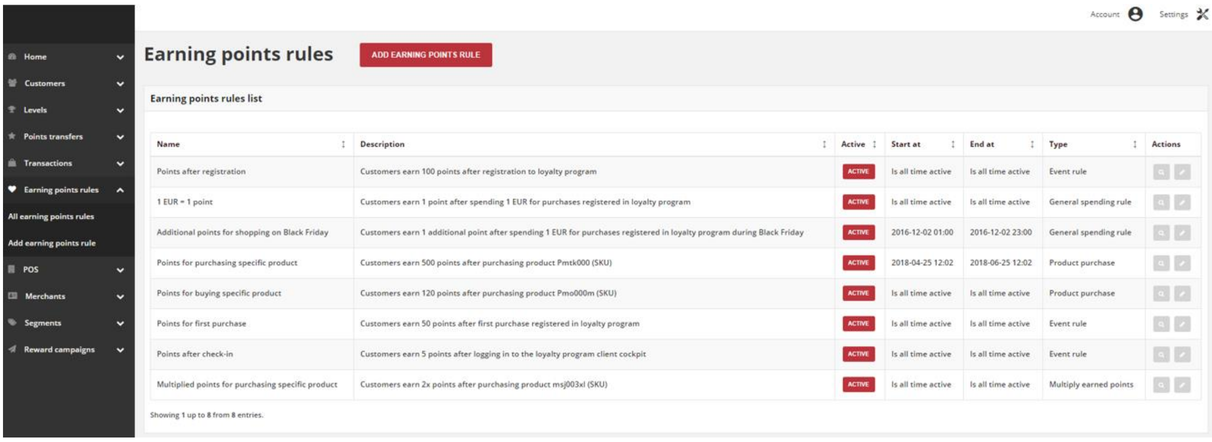


Add earning points rules

Lists all data that need to be filled out to add new earning points rule

All earning points rules

The All earning points rules grid provide information about type and activity of all Earning Points Rules within Loyalty Program. Moreover, list contains brief description about each one and allows to preview and modify rule detail.



Earning Points Rules List

Use the standard controls to sort the list by Purchase date and apply action (preview and modify) to selected rule records. Pagination controls appear if there are more rule records than fit on the page, and are used to move from one page to the next.

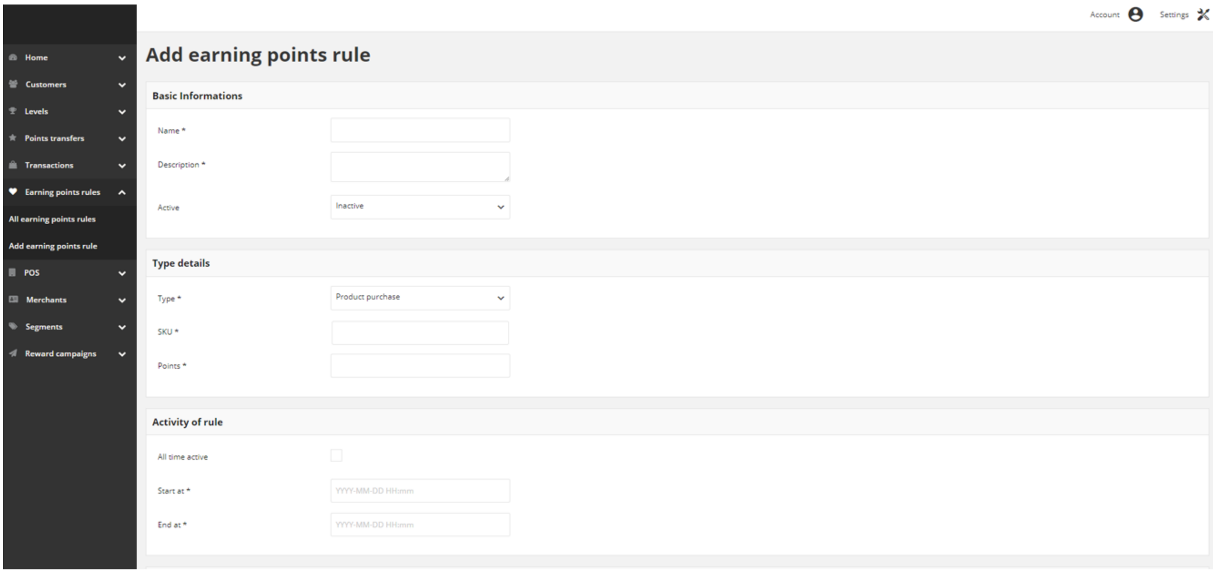
Field description

FIELD	DESCRIPTION
Name	Name of the rule displayed in views
Description	Brief description of rule
Active	Rule current status. Option include: Active/Inactive. Only Active rules are using for calculating earned points
Start at	Start date from which rule is active and can be used to calculate points
End at	End date until rule is active. After that date rule become inactive and can't be used to calculate points.
Type	Rule type. Option include: • Custom event rule • Customer referral • Event rule • General spending rule • Multiple earned points • Product purchase To learn more about the rule types, please see **Rule Types**
Actions	The operations that can be applied to selected rule. Options include: • Edit rule data • View rule details information

CHAPTER 12:

CREATING EARNING POINTS RULE

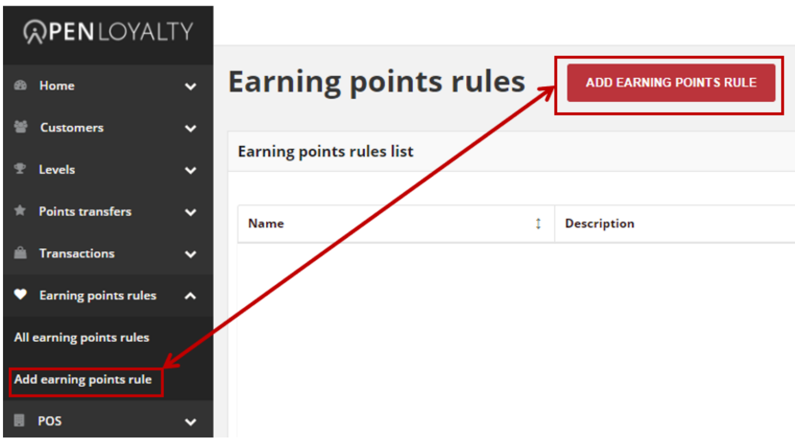
You can create unlimited amount customizable ways for customers to earn points within Loyalty Program based on various conditions.



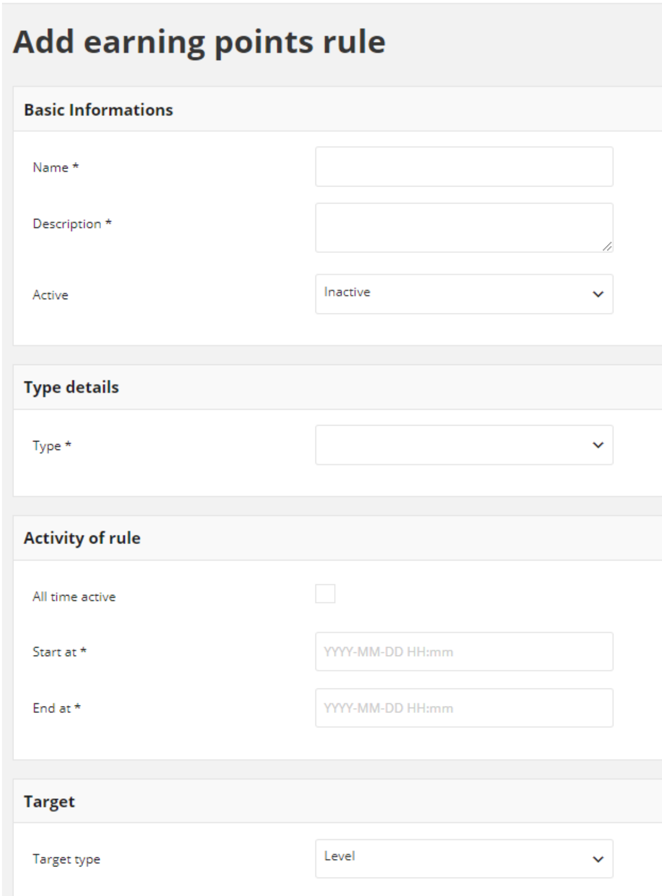
Add Earning Points Rule

To add new Earning Points Rule:

1. On the Admin sidebar, tap **Earning points rules**. Then, choose **Add earning points rule**. You can also add level directly from **All earning points rules** list by clicking **Add earning points rules** at the top of the page



Add Rule Options



Add Earning Points Rule Form

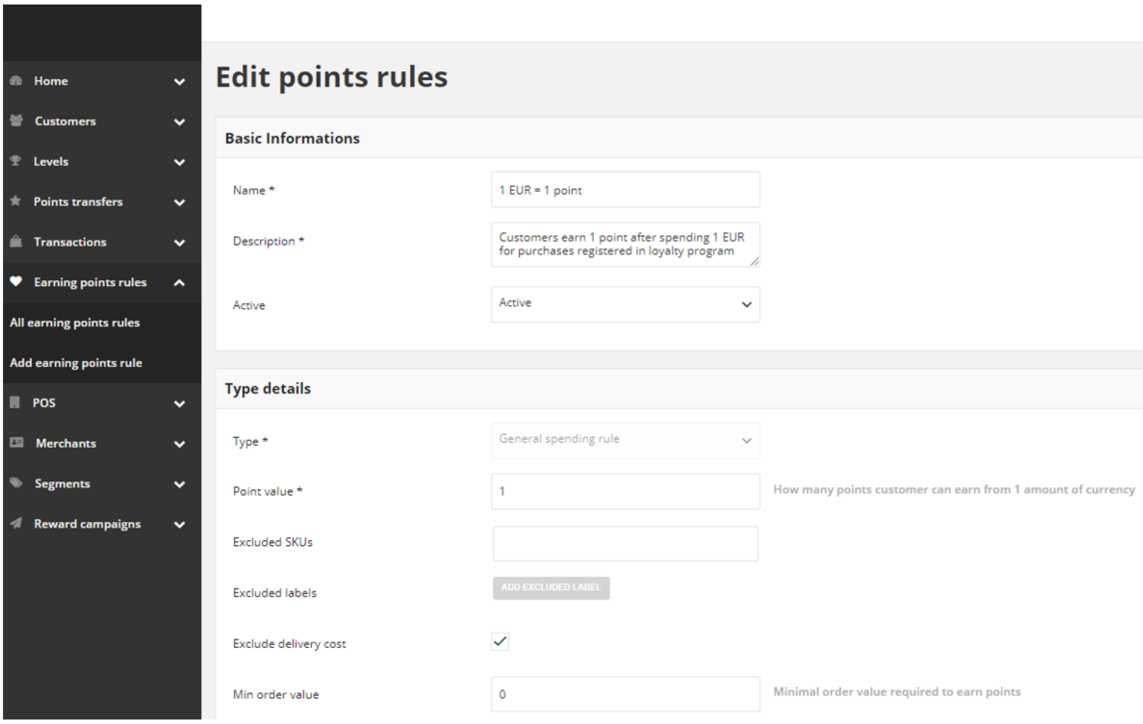
2. In **Basic informations** section, do the following:
   a. Enter **Name** of the rule that will be displayed in views
   b. Provide a brief **Description** of rule that explains how to award points
   c. To activate the rule, in **Active** field select "**Active**" from the dropdown list
3. In **Type details** section set rule type. Note, that once selected type can not be changed. See **Rule types** to learn more about Earning points rules types.
4. In ***Activity of rule*** section specify time boundaries when rule will be active
   - If you want the rule to be active all the time mark **All time active** checkbox
   - If you want the rule to be limited in time in **Start at** and **End at** fields specify dates between rule will be active
5. In ***Target*** section specify group of customers for which rule will be used. For example, Gold members will get 2 times more points than Bronze
   a. In **Target type** choose from dropdown list Level or Segment to specify whether the rule will be active for customers assigned to particular level or segment.
   b. Depending on the **Target type** field **Segments** to specify segments or **Levels** to specify levels appear. You can choose one or more levels/segments to used.

6. If applicable, in **Earning rule photo** section upload image for Earning points rule
7. When complete, tap Save

Image size is limited to 2MB. Image dimensions could not be smaller than 600 x 600 px. Allowed file formats: png, gif, jpg.

Updating Earning points rules

You can edit information regarding earning points rule used within your Loyalty Program, including all their data provided during rule creation process, except the rule type.



Earning Points Rule editing

To edit an Earning Points Rule:

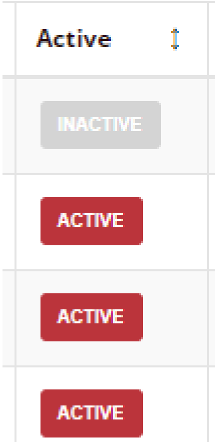
1. On the Admin sidebar, tap **Earning points rules**. Then, choose **All earning points rules.**
2. In the Earning Points Rules list,, find the rule to be edited and click **Edit** ( ) icon in the Action column to open the rule in edit mode.
3. Make any necessary changes to the rule.
4. When complete, tap Save

Activate/deactivate earning points rule

Any rule from the list can be activated and deactivated by Admin user.

To activate/deactivate level:

1. On the Admin sidebar, tap **Earning Points Rules**. Then, choose **All earning points rules**. You can also deactivate/activate the rule from **Edit mode**
2. In the Earning points rule list, find the rule to be deactivated and click **Active** in the **Active** column. The button in the column change to ***Inactive*** and appear as a grey-out.



Active Column

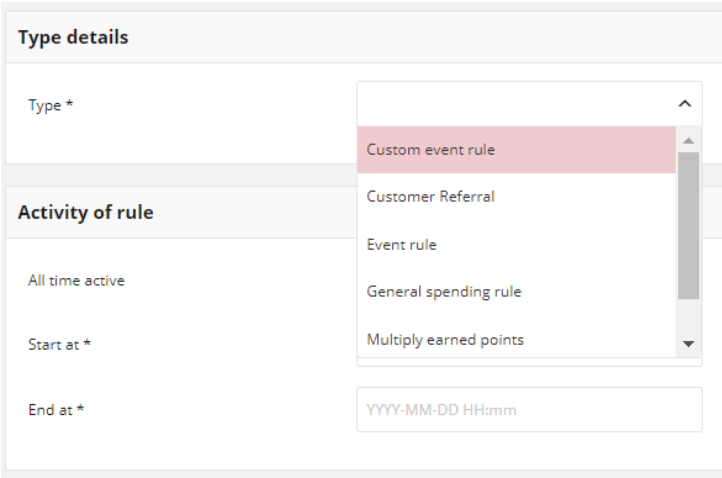
   When you deactivate rule, customers' will not earned points based on this rule terms.

3. To activate the rule click **Inactive** in the **Active** column. The button in the column change to ***Active*** and appears as a red.

CHAPTER 13:

EARNING POINTS RULES TYPES

During creation of rule you must specify its type, describing conditions for awarding points. Every rule type has its own required fields (conditions) that must be filled.



Rule Types

Open Loyalty offer following standard types:

a. **Custom event rule** – Customer could receive points for external actions

b. **Customer referral** – Referred and/or Referrer customer receive points for his action

c. **Event rule** - Customer could receive points for specified actions

d. **General spending rule** - Customer could receive points for order value

e. **Multiple earned points** - Customer could receive multiple points for product with specified SKU

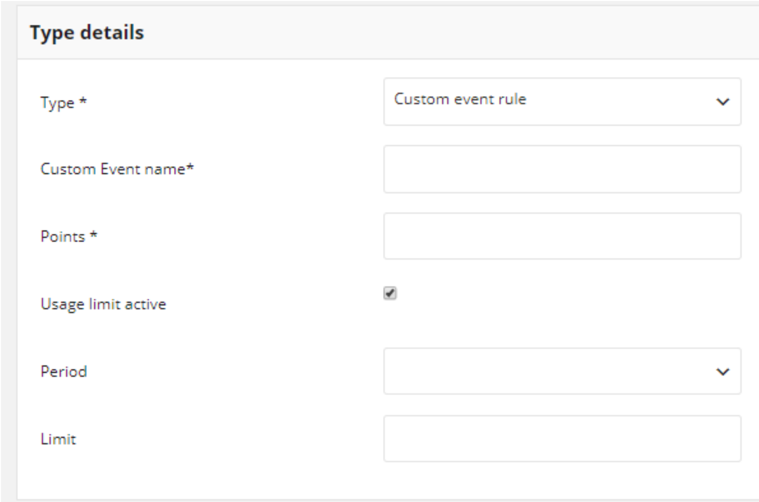
f. **Product purchase** - Customer could receive given amount of points for specified product

g. **Multiply earned points by product labels –** Customer could receive multiple points for product with specified labels

Custom event rule

Reward customer with defined amount of points for his action in external system. For example, share account with Facebook, add review for a product etc. If needed, you can also add repeatability limit to this rule type.

This Earning Point rule could be call only with API. Every run of API function will reward Customer with defined points.



Custom Event Rule

Field description

FIELD	DESCRIPTION
Custom Event name	Name of the rule (to be used with calling API function)
Points	Number of points that will be added after earning rule has been called
Usage limit active	Option to limit how many times customer could be rewarded for the same action with the specified period of time. Option include: • Yes – mark checkbox to limit repeatability • No – leave checkbox blank to reward customer for this rule without limits
Period	Visible and required if ***Usage limit active*** is marked. It defines period of time within customer can be rewarded for this rule. Option include: • 1 day • 1 week • 1 month
Limit	Visible and required if ***Usage limit active*** is marked. how many times customer could be rewarded for this rule in specified period of time.

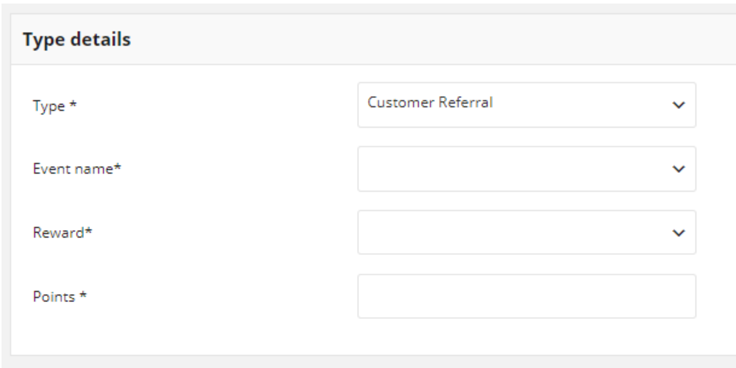
If customer used the limit then rule will not be shown on available rules list in Customer cockpit

Customer Referral

Referral (refer a friend, member get member) functionality allow to reward Customers for invitation other Customers to Loyalty program. It allow to give prize either referrer (Customer who send invitation) and referred person (Customer who respond with action to invitation).

Functionality allow to reward for actions:

- Referred Customer register new account in OL
- Referred Customer make first purchase in OL (first transaction)
- Referred Customer make purchase in OL (every transaction)



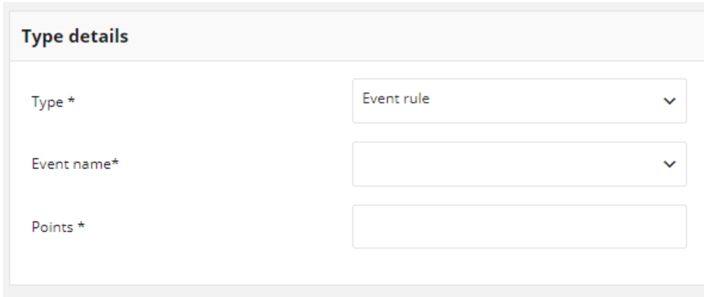
Customer Referral Rule

Field description

FIELD	DESCRIPTION
Event name	Select an event for which the customer will receive points. Options include: • Every purchase • First purchase • Register
Reward	Select who should receive points for this action. Option include: • Referred • Referrer • Both
Points	Amount of points that will be earned for this event rule

Event rule

Reward customer with defined amount of points for his action. Actions for which customer can get points are predefined in the Open Loyalty and related to events of your loyalty program. For example, create an account, first purchase etc.



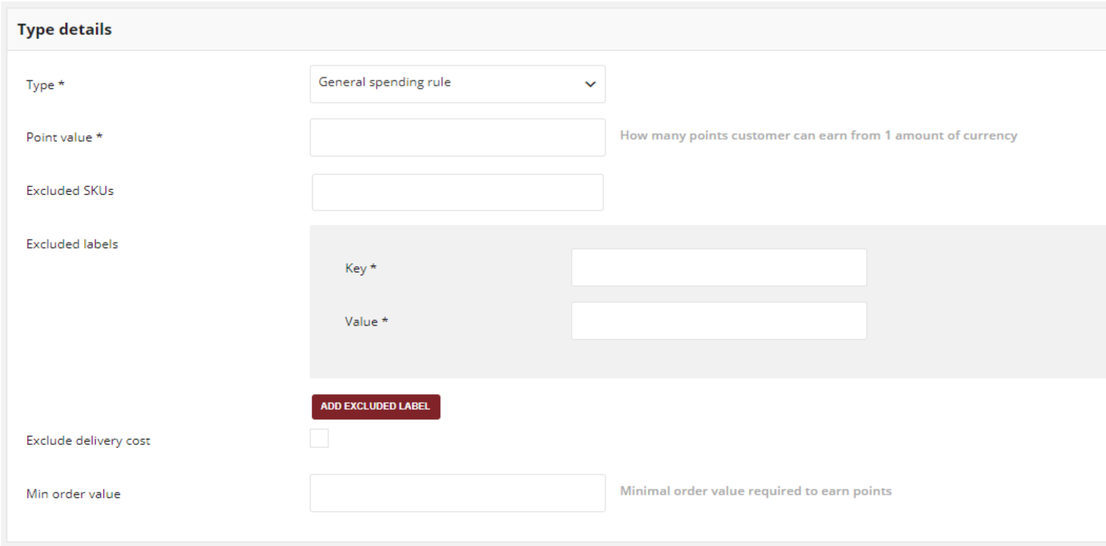
Event Rule

Field description

FIELD	DESCRIPTION
Event name	Select an event for which the customer will receive points. Options include: • Account created • Customer logged in • First purchase • Newsletter subscription
Points	Amount of points that will be earned for this event rule

General spending rule

Reward customer with defined amount of points for his order value. Allows to specify how many points customer can earn from 1 amount of currency. If needed, you can exclude certain products (with define SKUs or labels) and delivery costs from the points calculation.



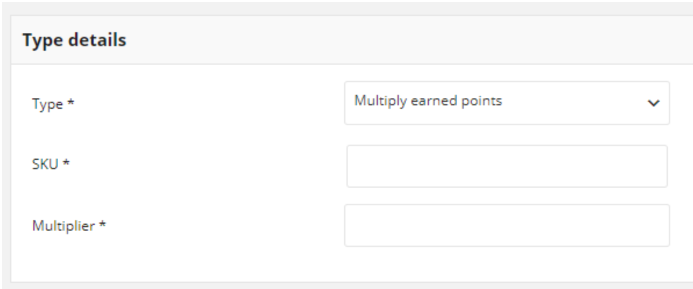
General Spending Rule

Field description

FIELD	DESCRIPTION
Point value	Ratio for calculating earned points based on purchased value. For example, if ratio is 2 then user get 2 points for every 1$ spent.
Excluded SKUs	Product with selected SKUS will not be included in order value used for earned points calculation.
Excluded labels	Points will not be calculated for the purchase of products with defined labels. Pair of Key and Value
Excluded delivery cost	When selected then delivery cost will not be included in order value used for earned points calculation .
Min order value	Minimal order value required to earn points. Points will not be calculated for whole purchase if its value will be below provided value

Multiply earned points

Multiple points that customer receive for purchase products with specified SKU. The rule is related to Product purchase rule. The rule defines for which purchase products, points (defined in Product purchase rule) are to be multiplied.



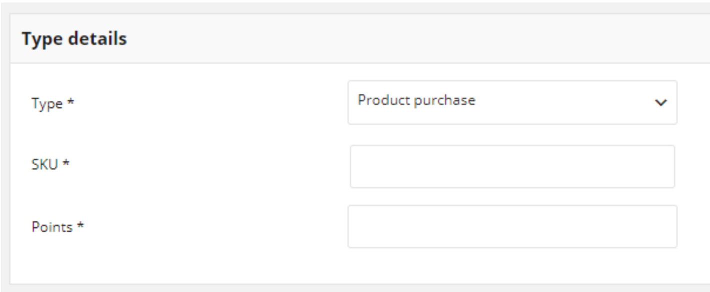
Multiple earned points

Field description

FIELD	DESCRIPTION
SKU	Rule will be applied only for listed products with selected SKUs
Multiplier	Points gained for purchase product will be multiplied by this factor

Product purchase

Reward customer with defined amount of points for purchase specified products. Rule can be related to Multiply earned points rule.



Product Purchase

Field description

FIELD	DESCRIPTION
SKU	Rule will be applied only for listed products with selected SKUs
Points	Predefined amount of points will be earned instead of calculation based on product value

Multiply earned points by product labels

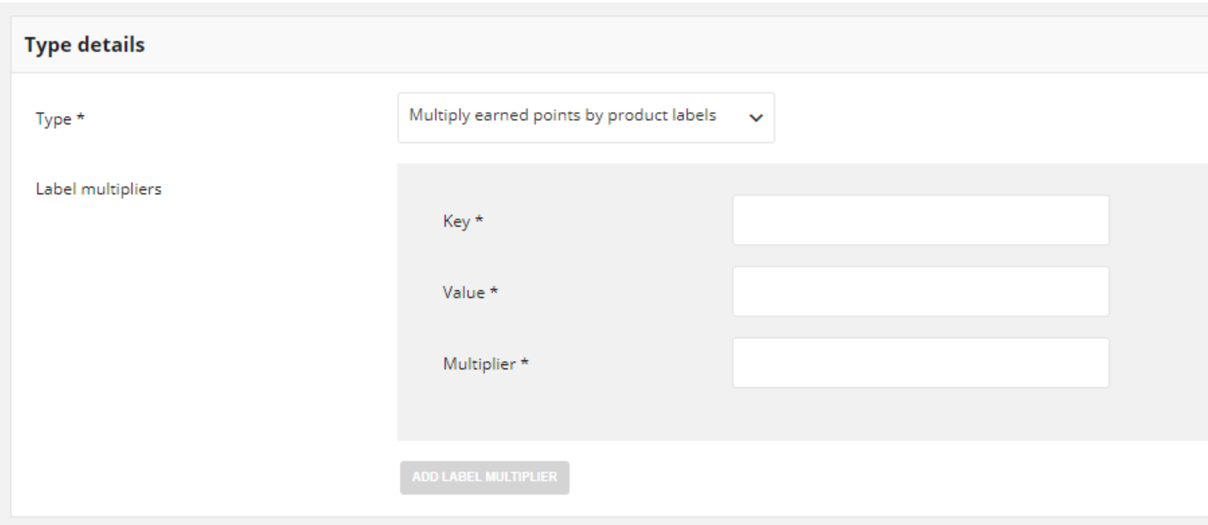
Multiple points that customer receive for purchase products with specified labels. The rule is related to Product purchase, Multiply earned points and General spending rule. The rule defines for which purchase products, points (defined in rules above) are to be multiplied.

The sequence of points calculation is as following:

- Firstly, if applicable, customer receives points from general spending rule
- Secondly, if applicable, points are multiply based on multiply earned points rule
- In next step, points are multiply based on labels multipliers from discussed rule.
- Finally, if applicable, customer receives points from product purchase rule

Rule can contains more than one product label. Different **Labels** are linked with OR condition - at least one of labels linked with this rule must be true to let customer earn points. If more than one is true, points are multiply in order by all multipliers.

For example, if you have 2 labels assigned to this rule which are true, points gathered from purchases are multiply firstly by multiplier assigned to 1st label, and then again multiply by multiplier assigned to 2nd label.



Multiply earned points by product labels

Field description

FIELD	DESCRIPTION
Key	Product label name e.g. size, color

Value	Value of product label with specified in previous step Key, e.g. M, red
Multiplier	Points gained for purchases product with label key and value from above will be multiplied by this factor
Add label multiplier	Button allowing to add next product label that will be assigned to rule

POS

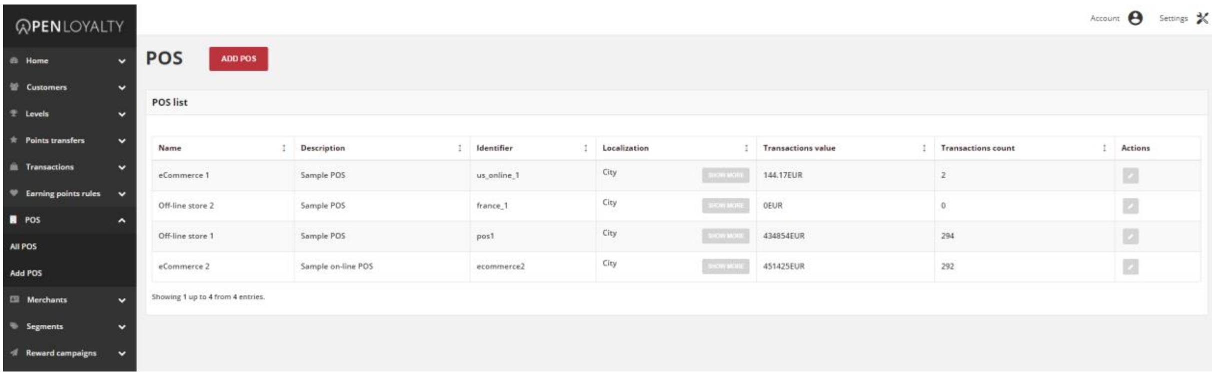
In this section of the guide, you'll learn how to set up a stores – online and offline, and manage their data

CHAPTER 14:

POS MENU

Customers can make transactions not only in the online store but also in offline stores. Both transactions should be count within your Loyalty Program. POS menu allows you to define all stores, that transaction should be included within your Loyalty Program.

You can simply track all stores and theirs transactions details – value and number.

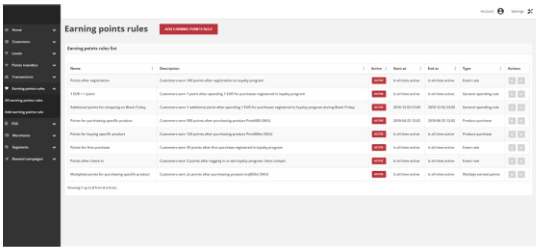


POS

To display the POS menu:

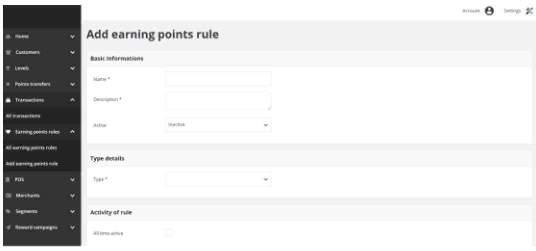
On the Admin sidebar, tap **POS**, then choose **All POS**.

Menu options



All POS

Lists all POS within your loyalty program with additional information regarding it's localization and transactions.

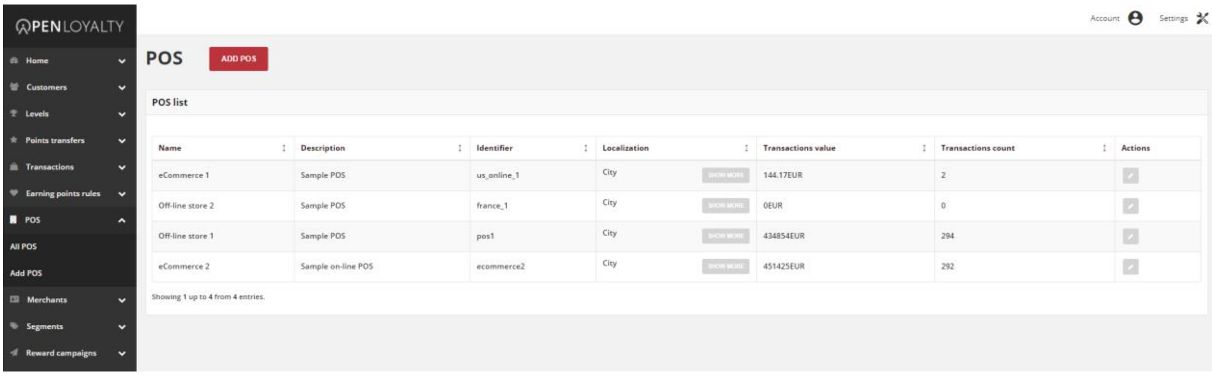


Add POS

Lists all data that need to be filled out to add new POS

All POS

The All POS grid provide information about all stores, which transactions made by customers will be registered and count within Loyalty Program. Moreover, list contains address details and brief description about each one and allows modify POS detail.



POS

Use the standard controls to sort the list and apply action (modify) to selected POS records. Pagination controls appear if there are more rule records than fit on the page, and are used to move from one page to the next.

Field description

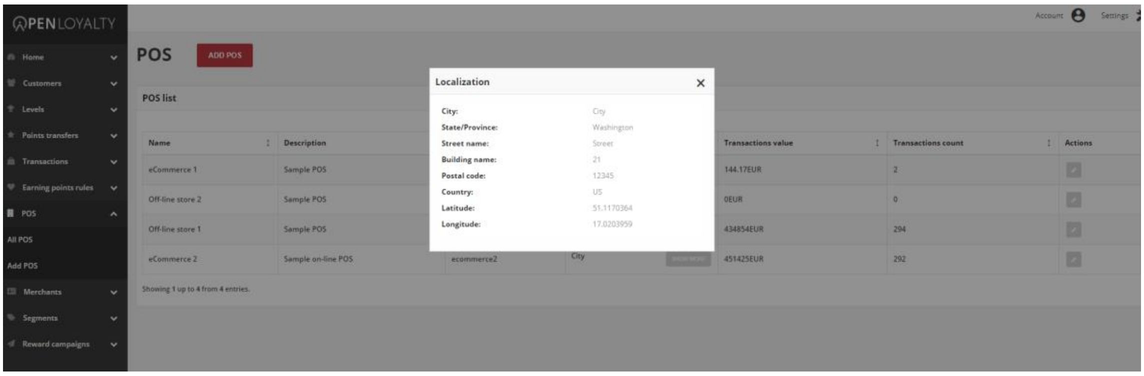
FIELD	DESCRIPTION
Name	Name of the store
Description	Brief description of the store
Identifier	Unique name used for internal identification
Localization	Address details of the store. Only city is visible. More information is available after clicking **Show more** .
Transactions value	Sum of all transactions values that were processed in POS
Transactions count	How many transactions were processed in POS
Actions	Open POS record in edit mode

POS localization details

You can simply view not only the transaction summary and city were store is located but also the address details.

To display the address details:

1. On the Admin sidebar, tap **POS**. Then, choose **All POS**.
2. In the POS list, find the store you want to see address details and click **Show more** in the **Localization** column. After clicking, the popup with detailed address will be shown.

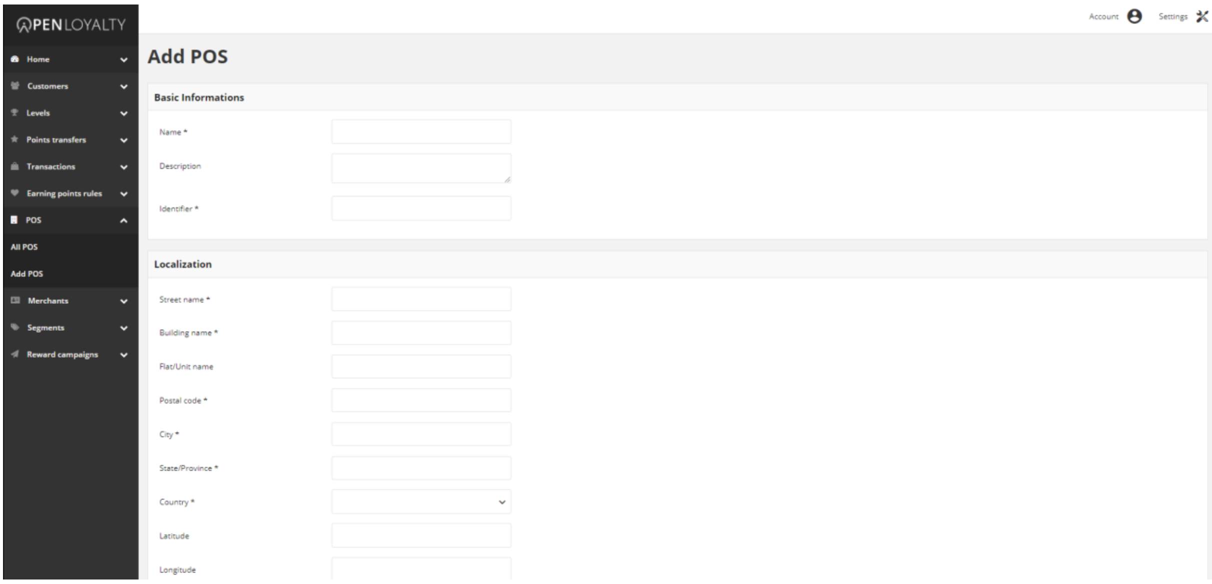


Localization Details Popup

CHAPTER 15:

ADDING NEW POS

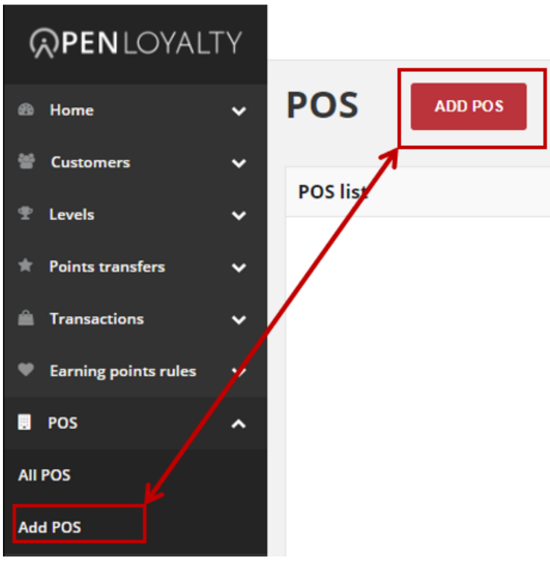
You can add unlimited amount of stores where processed transaction within Loyalty Program will be recorded and count.



Add POS

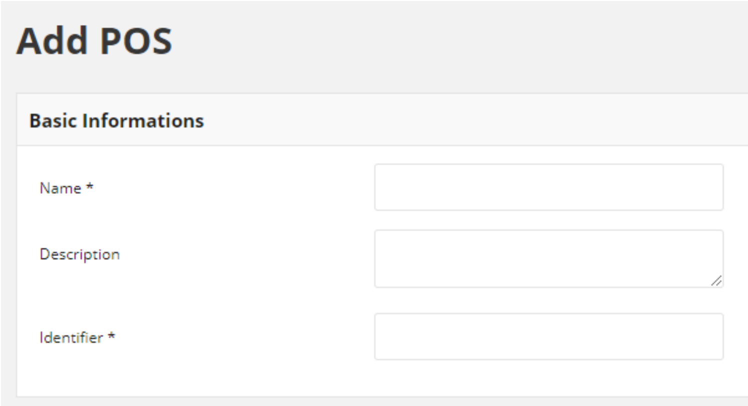
To add new POS:

1. On the Admin sidebar, tap **POS**. Then, choose **Add POS**. You can also add store directly from **All POS** list by clicking **Add POS** at the top of the page.



Add POS Options

2. In the **Basic informations** section, do the following:



Add POS Basic Information Section

   a. Enter **Name** of the store that will be displayed in views
   b. If needed, provide a brief **Description** of store that help identifications
   c. To better identification, in **Identifier** field select enter unique store name

3. In **Localization** section, provide the following required store address detail information:

   - Street name
   - Building name
   - Postal code
   - City
   - State/Province
   - Country

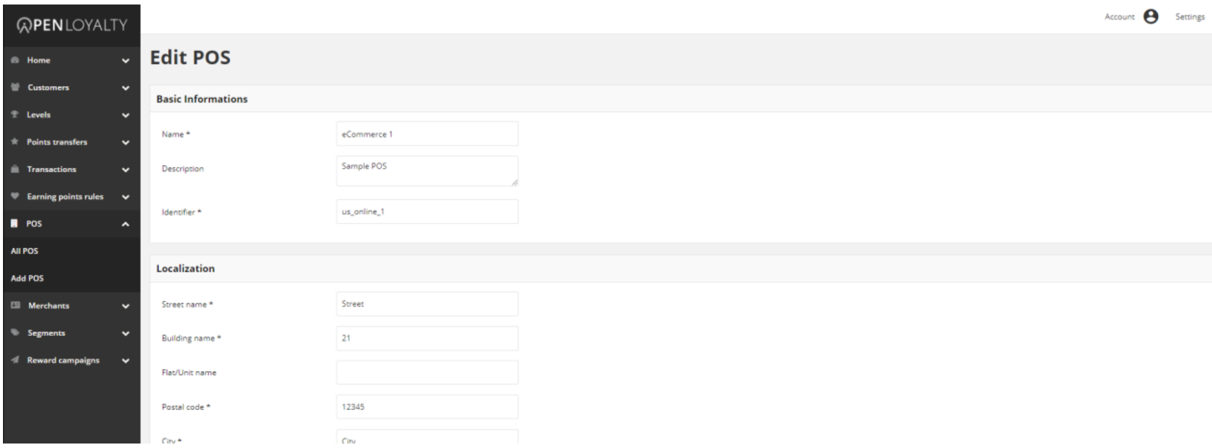
4. In the same **Localization** section, complete the optional fields as needed:

   - Flat/Unit name
   - Latitude
   - Longitude

5. When complete, tap **Save**

Updating POS information

You can edit information regarding POS used within your Loyalty Program, including all their data provided during POS creation process.



POS Editing

To edit a POS:

1. On the Admin sidebar, tap **POS**. Then, choose **All POS.**
2. In the POS list,, find the store to be edited and click **Edit** ( ) icon in the Action column to open the store in edit mode.
3. Make any necessary changes to the store.
4. When complete, tap **Save**

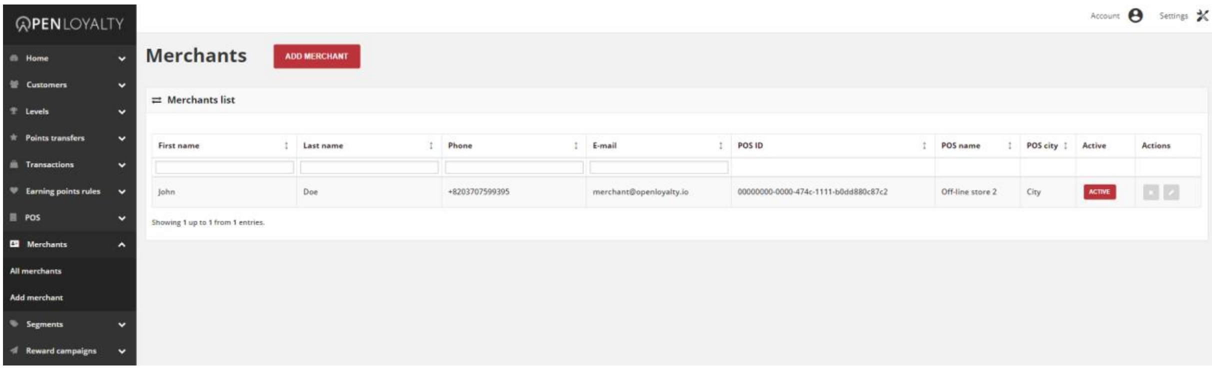
MERCHANTS

This section of the guide provides an overview of the all merchants working in yours stores and involve with Loyalty Program. You'll learn how to add and manage merchant data, including assigning to particular store.

CHAPTER 16:

MERCHANTS MENU

The Merchant is linked to a store. In Open Loyalty store is called point-of-sale (POS). Merchants menu provide an overview of all merchants and it's assigned to particular POS. You can simply see number of merchants works in particular store. Moreover, you can assigned merchant to customer, who is operated by a given merchant.

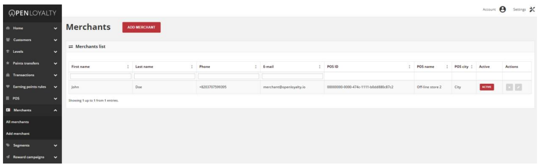


Merchants

To display the Merchant menu:

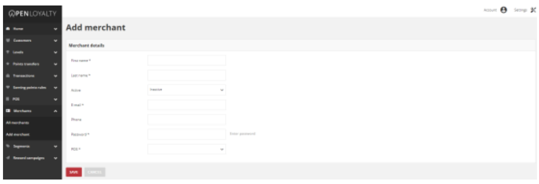
On the Admin sidebar, tap **Merchant**, then choose **All merchants**.

Menu options



All merchants

Lists all Merchant within your loyalty program with additional information regarding his data and assigned POS localization.

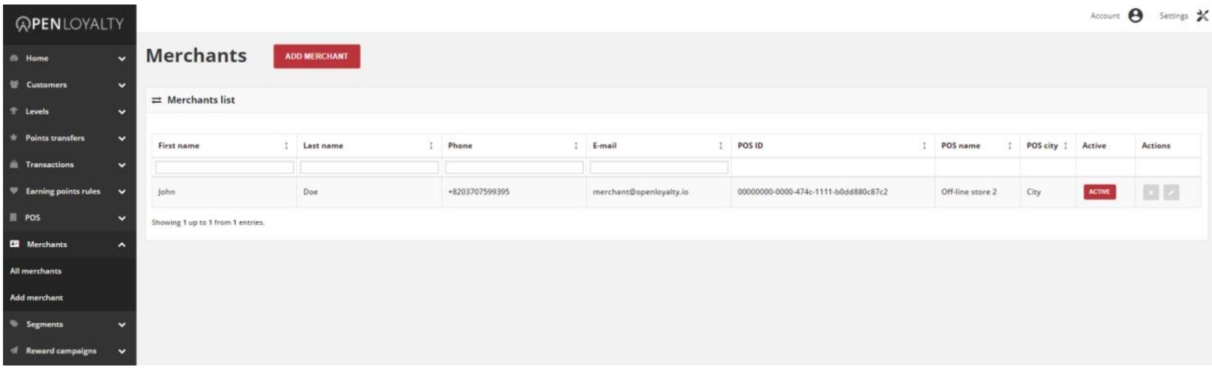


Add merchants

Lists all data that need to be filled out to add new Merchant

All Merchants

The All merchants grid provide information about all merchants and its assigned to a POS, which transactions made by customers will be registered and count within Loyalty Program. Moreover, list contains POS address details and additional information about each one and allows modify merchant data.



All Merchants

Use the standard controls to sort the list, filter and search merchant by typing in the field under column header value you want to find, and apply actions to selected merchants (modify or remove). Pagination controls appear if there are more merchants records than fit on the page, and are used to move from one page to the next.

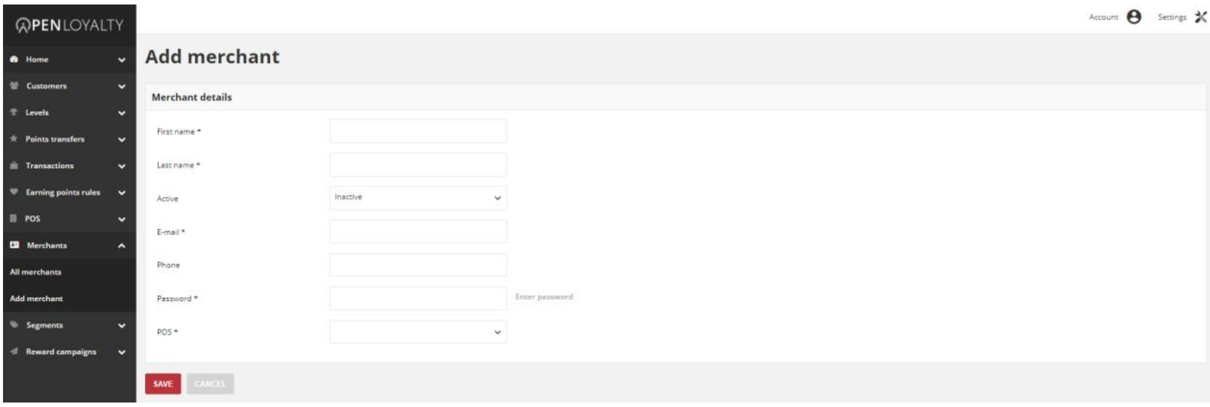
Field description

FIELD	DESCRIPTION
First name	The first name of the merchant
Last name	The last name of the merchant
Phone	The merchant phone number. Can be used as a search/filter option.
Email	The merchant email address. Can be used as a login to POS Cockpit or search/filter option.
POS name	Name of the store
POS city	City where store is located
Active	Merchant account current status. Option include: Active/Inactive. Only Active merchants account are using for login to POS Cockpit.
Actions	The operations that can be applied to selected merchant account. Options include: • Edit merchant data • Remove merchant account

CHAPTER 17:

CREATING MERCHANT ACCOUNT

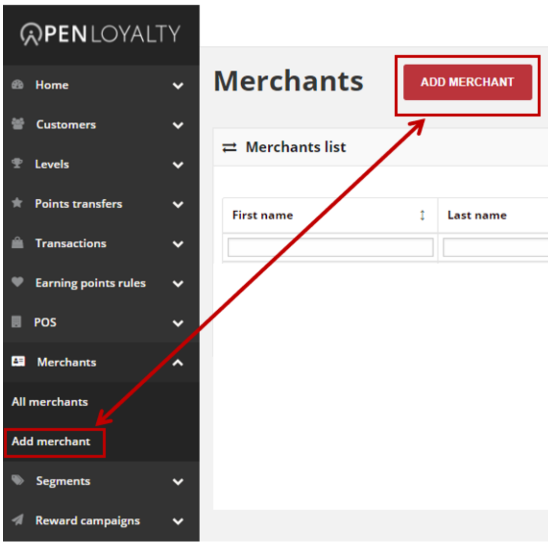
You can create from Admin unlimited amount of merchants account and assigned them with particular store (POS). Merchant account is needed to log in to POS Cockpit.



Add Merchant Account

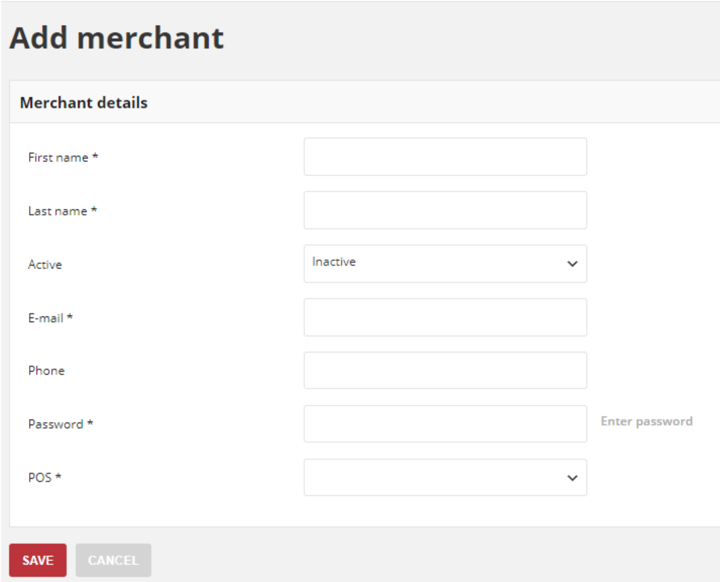
To add new merchant account:

1. On the Admin sidebar, tap **Merchants**. Then, choose **Add merchant**. You can also add merchant directly from **All merchants** list by clicking **Add Merchant** at the top of the page.



Add Merchant Options

2. In the **Merchant details** section, do the following:



Add Merchant Form

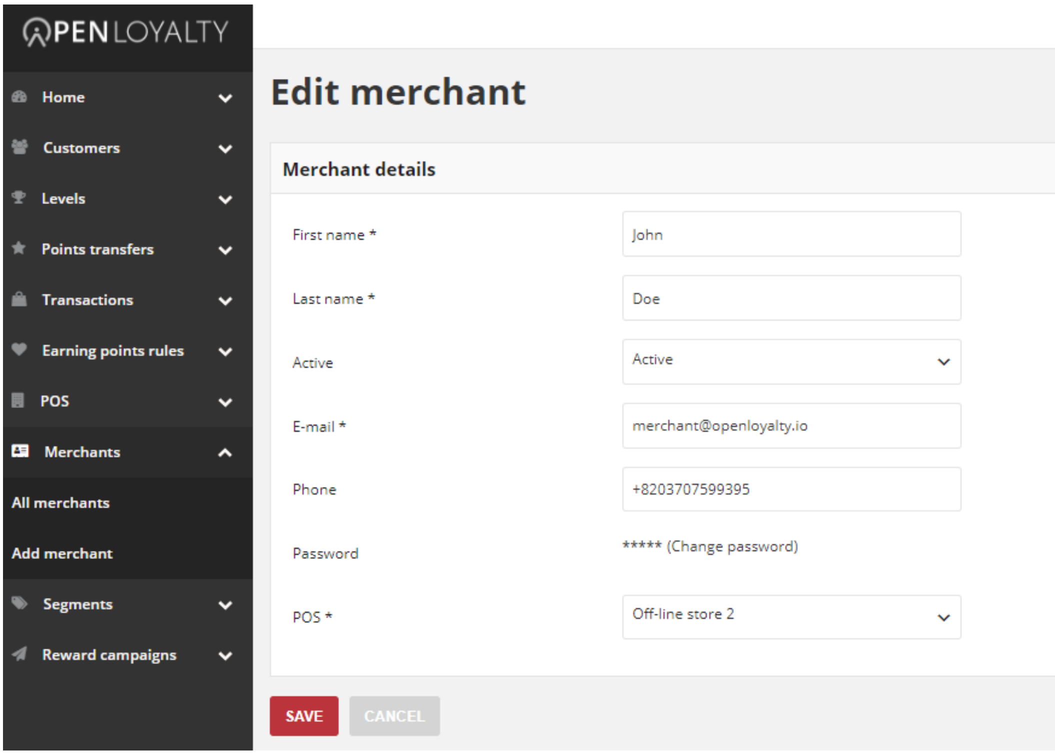
   a. Enter merchant **First name** and **Last name**
   b. To activate the merchant account, in **Active** field select "**Active**" from the dropdown list
   c. Enter merchant **E-mail** address, which will be used as a login credential to merchant account in POS Cockpit.
   d. Provide merchant **Phone** number
   e. Enter **Password** to merchant account, which will be used as a login credential to account in POS Cockpit. Merchant receive password to his account via email message.
   f. Assigned **POS** to merchant by selecting from the dropdown list POS name

3. When complete, tap **Save**

Your password must be eight or more characters long, and contains at least one upper case letters, one numeric character and one special character

Updating Merchant account

You can edit information about your merchants, including all their data provided during account creation process and password.



Merchant Account Editing

To edit a merchant account:

1. On the Admin sidebar, tap **Merchants** Then, choose **All merchants.**
2. In the Merchants list, find the record to be edited and click **Edit** ( ) icon in the Action column to open the merchant in edit mode.
3. Make any necessary changes to the store.
4. When complete, tap **Save**

To change a password to merchant account:

1. On the Admin sidebar, tap **Merchants** Then, choose **All merchants.**
2. In the Merchants list, find the record to be edited and click **Edit** ( ) icon in the Action column to open the merchant in edit mode.
3. In **Password** field click **Change password** link. After clicking the field will be blank.

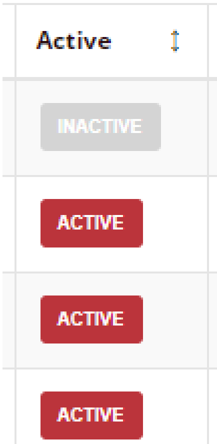
4. Provide a new password in blank **Password** field
5. When complete, tap **Save**

Activate/deactivate merchant account

Any merchant account from the list can be activated and deactivated by Admin user.

To activate/deactivate level:

1. On the Admin sidebar, tap **Merchants**. Then, choose **All merchants**. You can also deactivate/activate merchant account from **Edit mode**.
2. In the Merchants list, find the merchants to be deactivated and click **Active** in the **Active** column. The button in the column change to ***Inactive*** and appear as a grey-out.



Active Column

When you deactivate account, merchant will not be able to login to his account in POS Cockpit.

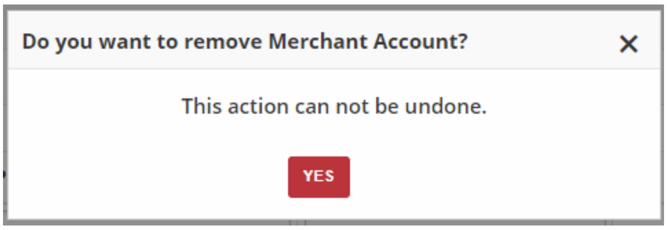
4. To activate the merchant account click **Inactive** in the **Active** column. The button in the column change to ***Active*** and appears as a red.

Remove merchant account

You can also delete merchant account from the Admin.

To delete a merchant account:

1. On the Admin sidebar, tap **Merchants** Then, choose **All merchants.**
2. In the Merchants list, find the record to be edited and click **Remove** ( ) icon in the Action column to delete the merchant account.
3. System display a message asked you to confirm the action. To confirm tap **Yes**

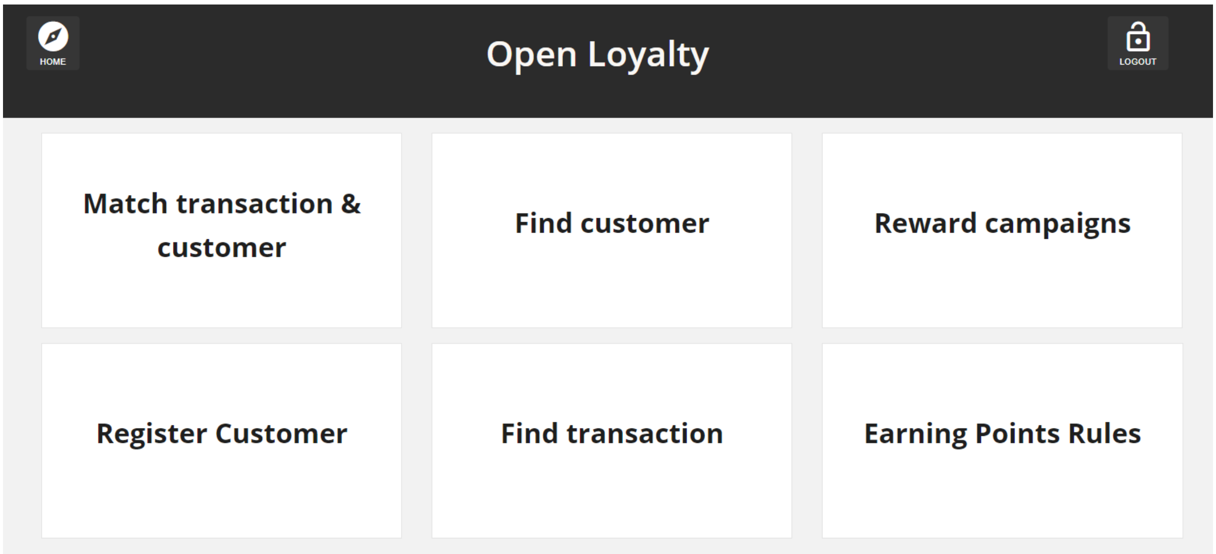


Removing Merchant Action

CHAPTER 18:

POS COCKPIT

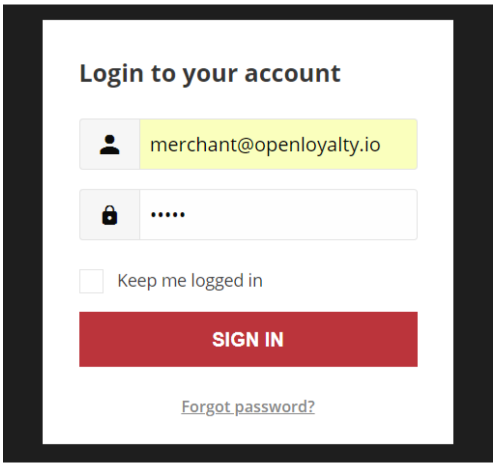
Merchants are linked with a store and Point of Sale (POS) device. PoS device play an important role in implementation of the Loyalty Program. The sale can be done by webshop or stationary by retailers to customers – but in that case only through PoS devices. This chapter gives an overview of the use of PoS Cockpit.



POS Cockpit Home Page

POS Cockpit Sign In

Merchants have easy access to their account from their POS. Merchants can be redirected to POS cockpit as loyalty module within your POS.



Sign In to POS Merchant Account

When merchants forgot their passwords, a reset link is sent to the email address that is associated with the account.

To sign in to your merchant account:

1. Click a link on the POS to open Login page
2. When prompted, enter the **Email Address** that is associated with customer account, and **Password**. Then, tap **Sign In**

To reset your merchant account password:

1. On the Login page, tap **Forgot password?**
2. When prompted, enter the **Email Address** that is associated with your account, and tap **Recover Password**

   If the email address you entered matches the one that is associated with the account, you will receive a "Password reset requested" email with a link to reset your password.

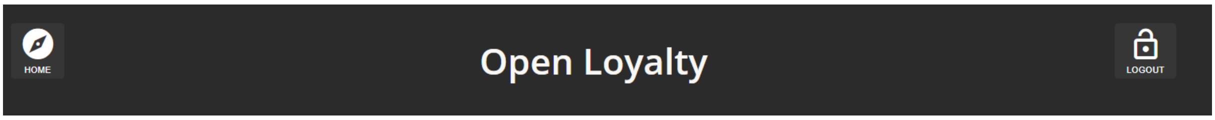
4. Click the **Reset Password link** in the email and enter your **New Password**. Enter it again to confirm.

> **Your password must be eight or more characters long, and contains at least one upper case letters, one numeric character and one special character**

When you receive confirmation that the password is updated, you can use the new password to log in to your account.

To sign out of the merchant account:

In the upper-right corner, tap the **Logout** (LOGOUT) icon.



Logout

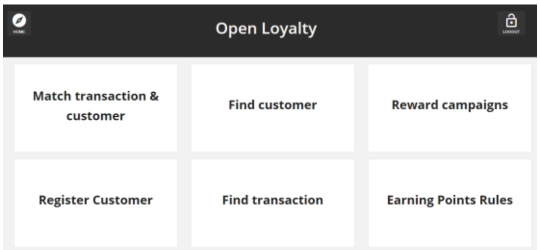
When merchant logout, the Sign-In page returns.

Merchant Account

Merchant through theirs account can view basic customer data and activity within Loyalty Program, and manage their own personal information.

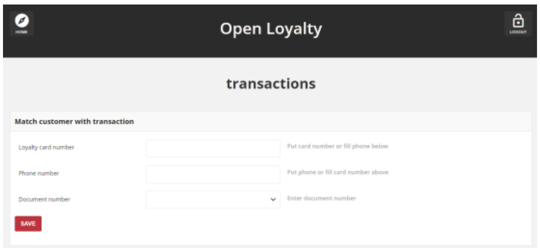
Your till is equipped with a touchscreen displaying the Open Loyalty POS Cockpit. Touch a control element (e.g. buttons, entry fields, etc.) displayed on the screen using your finger or a blunt object. The control element is activated and the function requested is executed.

The general elements described below provide you with transaction details, loyalty program operations and allow you to enter information or select functions displayed.



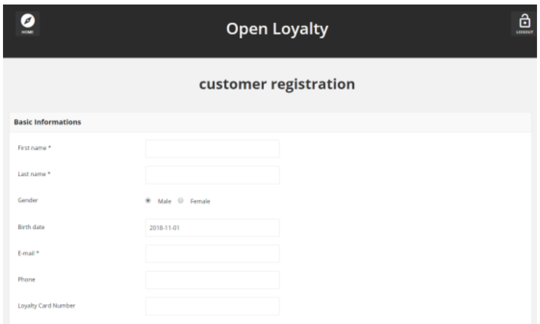
Home Page

The POS Cockpit Home page provides button links to main details of loyalty activities: transactions, customers, Earning Points Rules and Reward Campaigns.



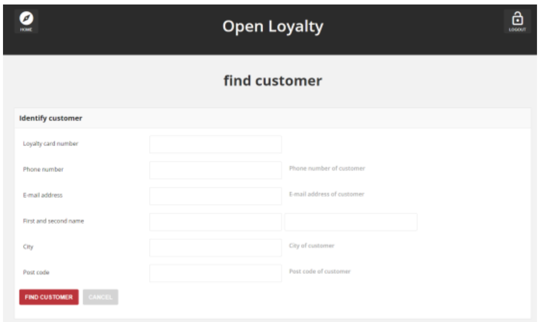
Match transaction & customer

Allows to link transaction with Customer Account directly from the POS. Based on matching transaction with customer identification factors priority (set up in Configuration. To remain about identification factors please see **Configuration.** Useful when only transactions are sent to Open Loyalty



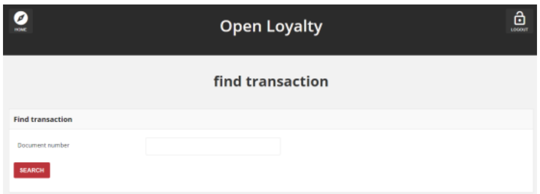
Register customer

Allows to register new customer directly from the POS. Useful when new customer want to register to Loyalty Program during his shopping in a store.



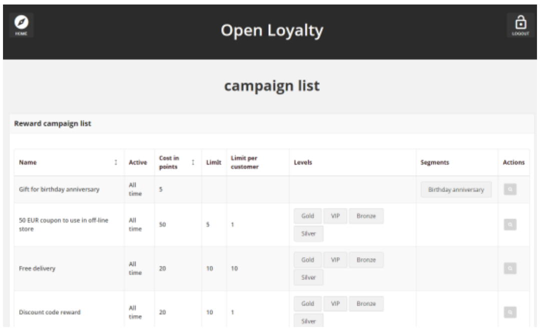
Find customer

Allows to find specify customer with a link to each to preview his profile details directly from the POS.



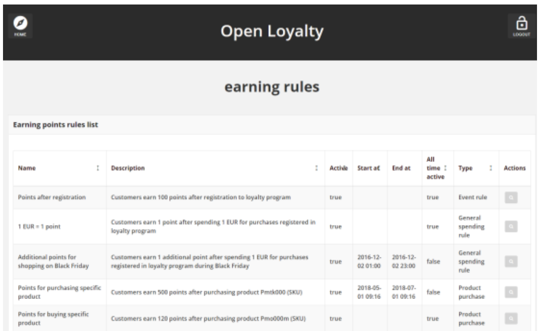
Find transaction

Allows to find specify transactions and preview its details directly from the POS with a link to each to see more information.



Reward campaigns

Lists all available rewards with details about target, limits, cost in points and status with a link to each to see more information.



Earning Points Rules

Lists all available rewards with description and details about type, time boundaries when rule is active and status with a link to each to see more information.

SEGMENTS

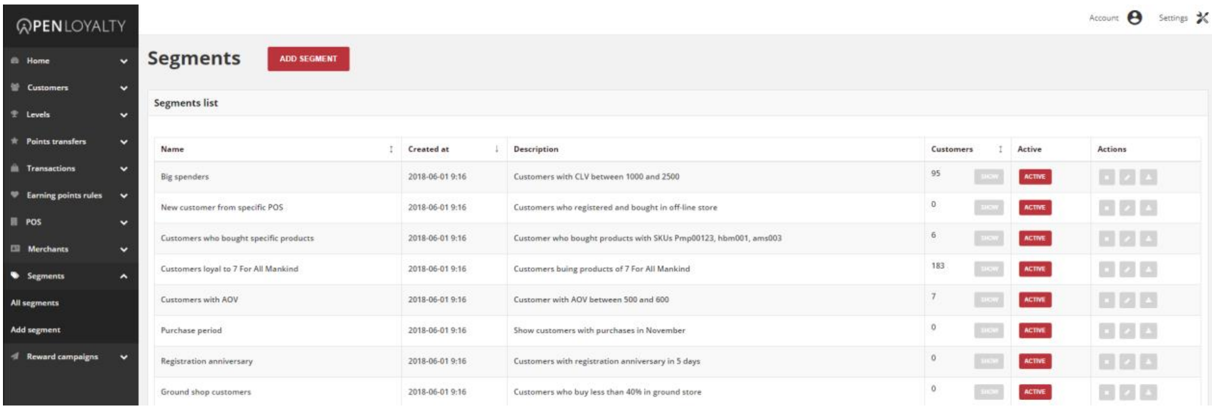
In this section of the guide you will become familiar with the customer segmentation feature, and learn to configure customer segments according to your preference. You will also learn how to create and assigned customers to segments, that can be referenced in rewards, earning points rules, levels etc.

CHAPTER 19:

SEGMENTS MENU

Customer segments allow you to e.g. dynamically count points, levels and display rewards to specific customers, based on properties such as system events, transactions history, purchasing activity, and so on. Customer can be assigned to several segments.

You can optimize marketing initiatives based on targeted segments. You can also preview and export the list of targeted customers. Because customer segment information is constantly refreshed, customers can become associated and disassociated from a segment as they shop in your store.

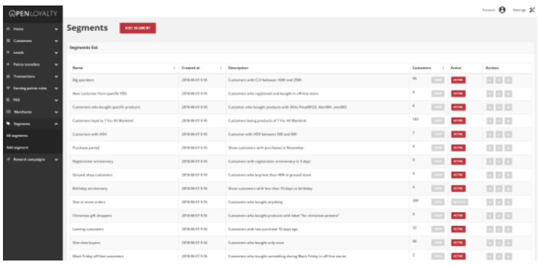


Segments

To display the Segments menu:

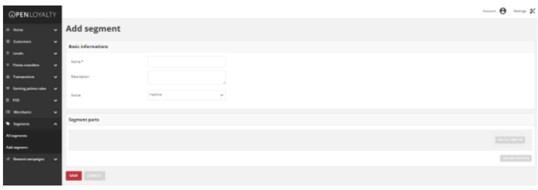
On the Admin sidebar, tap **Segments**, then choose **All segments**.

Menu options



All segments

Lists all customer segments within your loyalty program with brief description of each and additional information regarding assigned customers. There is also possibility to preview and export the list of targeted customers

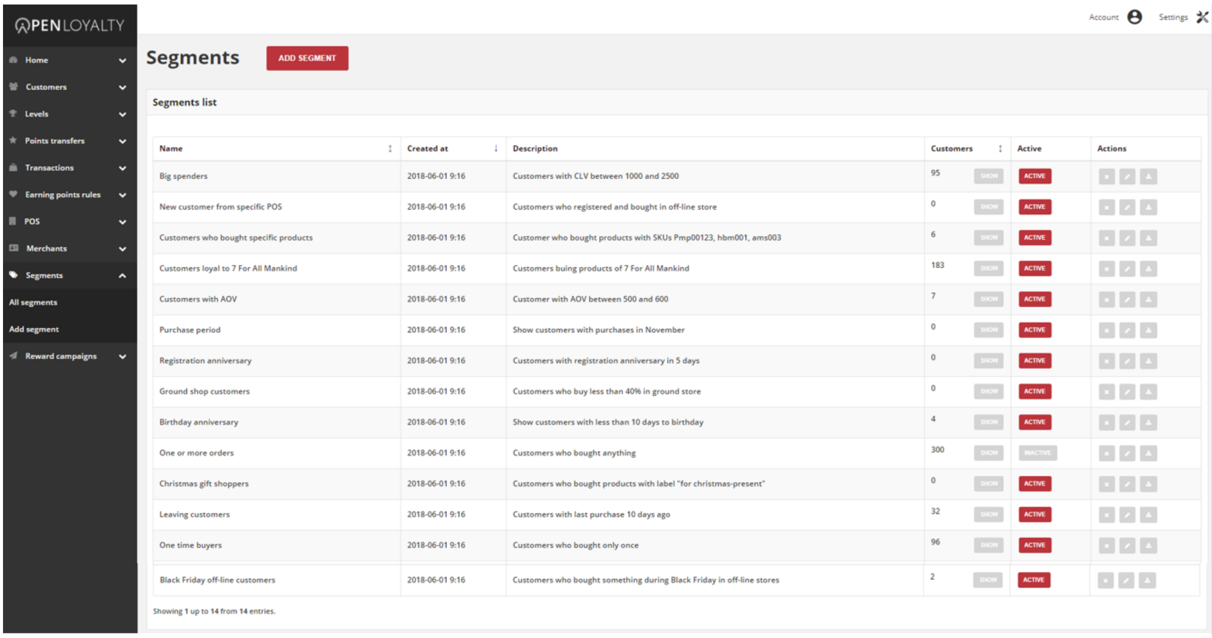


Add segment

Lists all data that need to be filled out to create new segment

All Segments

The All segments grid provide information about all segments within your Loyalty Program with information about assigned customers. Moreover, you can also export the list of targeted customers.



All Segments

Use the standard controls to sort the list and apply actions to selected segments (modify, remove, active/inactive, export customer list). Pagination controls appear if there are more segments records than fit on the page, and are used to move from one page to the next.

Field description

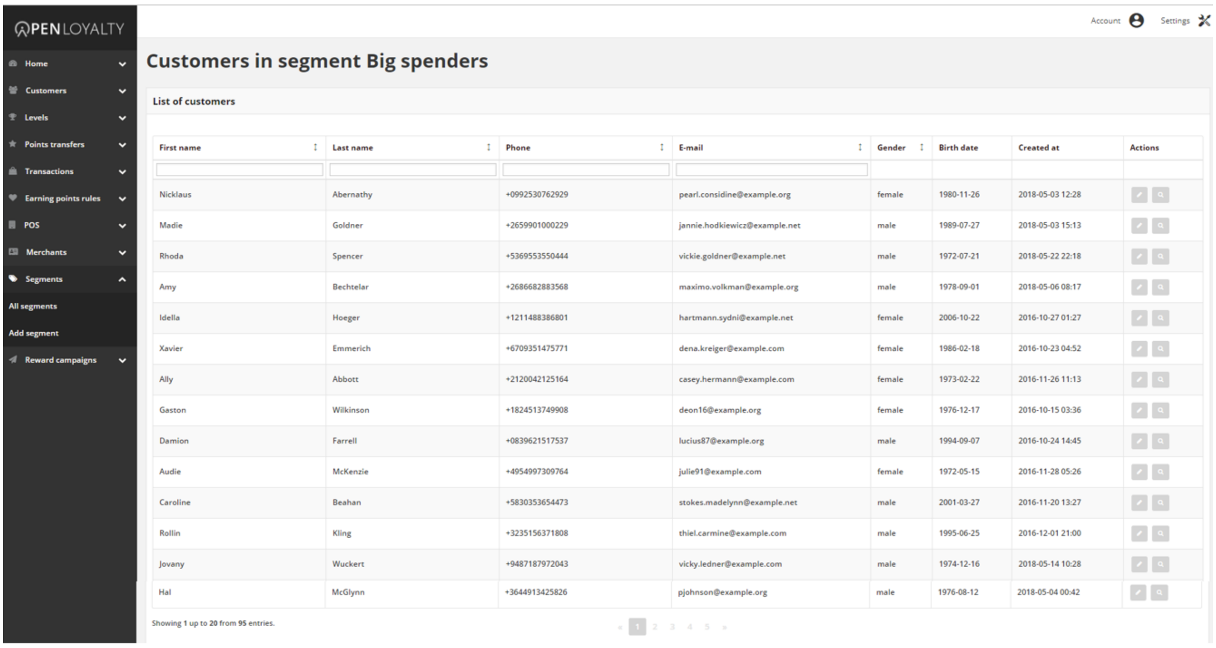
FIELD	DESCRIPTION
Name	Name of the segment
Created at	The date when segment was created
Description	Brief description of the segment
Customers	Show customers account number assigned to this segment. After **Show** click, list of these customer details will be shown.
Active	Segment current status. Option include: Active/Inactive. Customer could be assigned only to Active segment.
Actions	The operations that can be applied to selected segments. Options include: • Edit segment data • Delete segment • Download list of customers details assigned to this segment

Customers assigned to segment list

You can simply view not only the number but also the list of customers with details assigned to particular segment.

To display the list of customers:

1. On the Admin sidebar, tap **Segments**. Then, choose **All segments**.
2. In the Segments list, find the segment that you want to see customers list and click **Show** in the **Customers** column. After clicking, the list of customers will be opened, filtered according to the assigned segment.



List of Customers in Big Spenders Segment

Use the standard controls to sort the list, filter and search customer by typing in the field under column header value you want to find, and apply actions to selected customers (edit and view detail). Pagination controls appear if there are more customer records than fit on the page, and are used to move from one page to the next.

Download the Customers list

There is also possibility to download a list of customers to a CSV file.

To download the list of customers assigned to a segment:

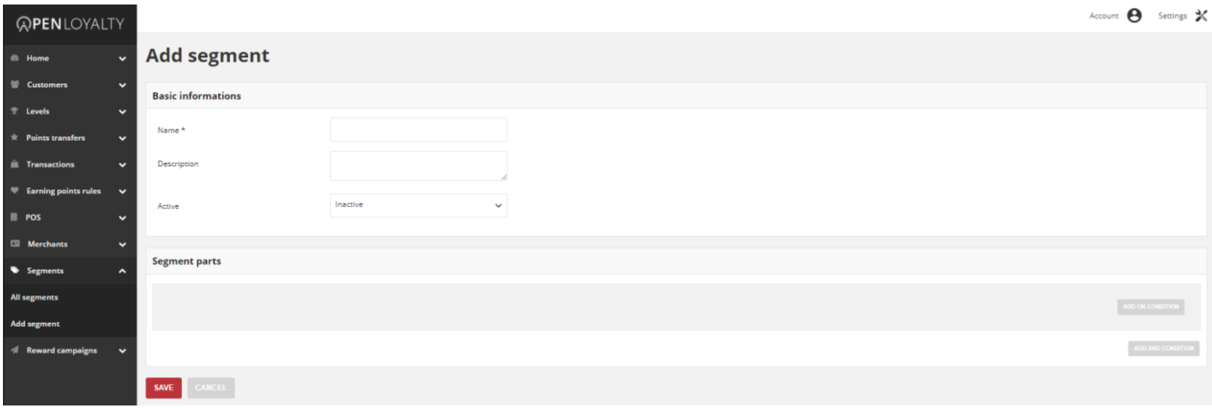
1. On the Admin sidebar, tap **Segments**. Then, choose **All segments**
2. In the Segment list, find the segment that you want download customers list and click **Download** ( ) icon in the **Action** column.

   After clicking, the list of customers will be download in .CSV format.

CHAPTER 20:

CREATING CUSTOMER SEGMENT

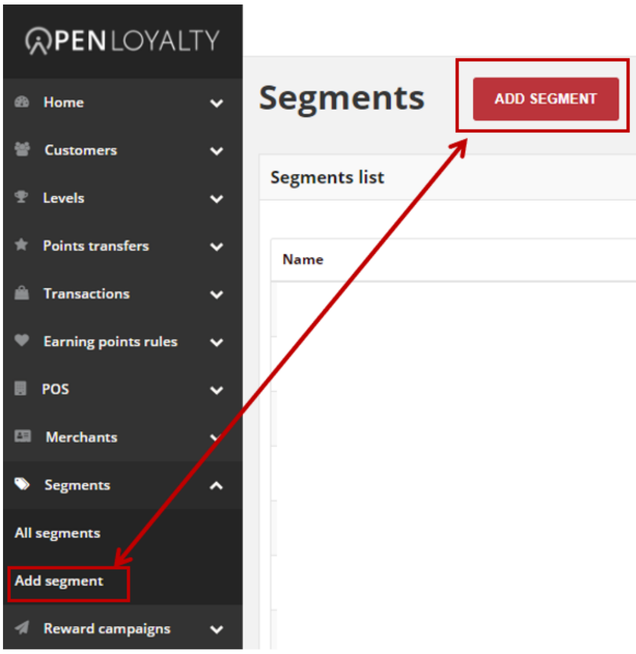
You can create unlimited amount customizable customers segments for your loyalty program based on various criteria's.



Add New Segment

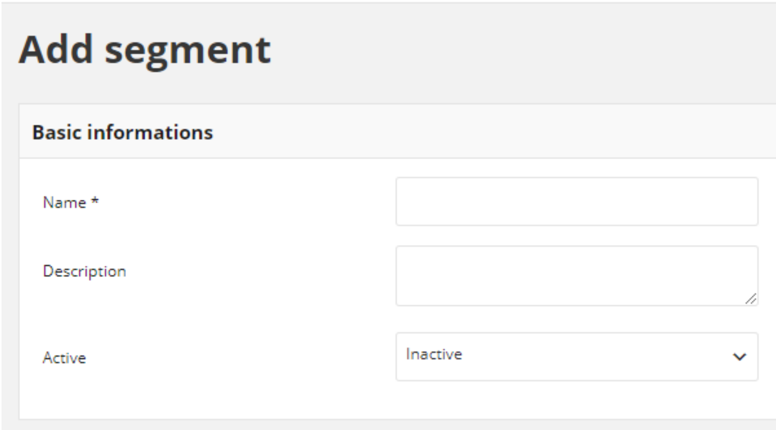
To create a New Customer Segment:

1. On the Admin sidebar, tap **Segments**. Then, choose **Add segment**. You can also add segment directly from **All segments** list by clicking **Add segment** at the top of the page.



Add Segment Options

2. In the **Basic informations** section, do the following:



Basic Informations Section

   a. Enter a unique segment **Name** to identify the customer segment when working in the Admin

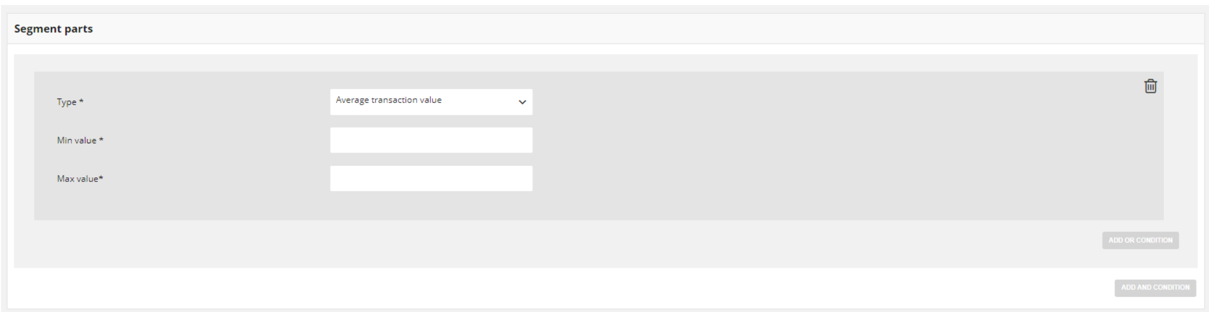
   b. Enter a brief **Description** that explain purpose of the segment for internal reference

   c. To activate the customer segment, in **Active** field select “**Active**” from the dropdown list

3. In **Segment Parts** set the conditions that must be met to assign the customer to this segment. One Segment consists of one or more conditions. Conditions can be combined through AND and OR logical operators.

   a. **AND Condition** is used to perform a logical conjuction on two conditions. Both conditions linked with this operator must be true. For example, you can create segment with a list of customers who made purchase in specific POS and bought specific SKU. The list will contain customer who met both, 1st and 2nd condition.

   b. **OR Condition** is used to perform a logical disjunction on two conditions. At least one of conditions linked with this operator must be true. For example you can create segment with a list of customers who made purchase in specific POS or bought specific SKU. List will contain customer who met only the 1st condition, who met only the 2nd condition and met both conditions.



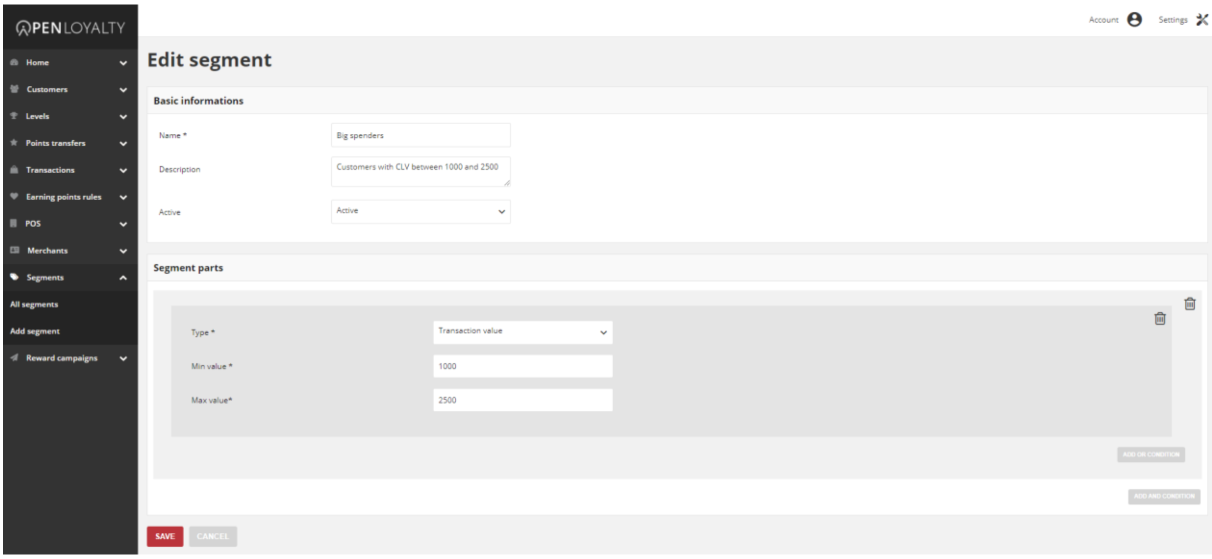
Segment Parts Section

To learn more about conditions type, see **Segment parts types**

4. You can simply remove condition by clicking bin ( ) icon in a particular row.
5. When complete, tap **Save**

Updating segments data

You can edit all data provided during segment creation process. You can update segment data by selecting it’s record from **All segments** list.



Segment Edition

To edit a Segment:

1. On the Admin sidebar, tap **Segments**. Then, choose **All segments**.
2. In the Segments list, find the record to be edited and click **Edit** ( ) icon in the Action column to open the segment in edit mode.
3. Make any necessary changes to the segment data
4. When complete, tap **Save**

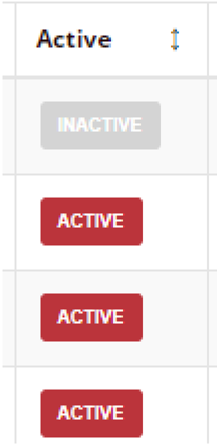
Activate/deactivate Segment

Any Segments from the list can be activated and deactivated by Admin user.

To activate/deactivate Segment:

1. On the Admin sidebar, tap **Segments**. Then, choose **All segments**. You can also deactivate/activate segment from **Edit mode**

2. In the Segments list, find the segment to be deactivated and click Active in the **Active** column. The button in the column change to ***Inactive*** and appear as a grey-out.



Active Column

When you deactivate segments, customers accounts assigned to this level will not be refreshed and new customers will not be associated to it.

3. To activate the segment click Inactive in the **Active** column. The button in the column change to ***Active*** and appears as a red.

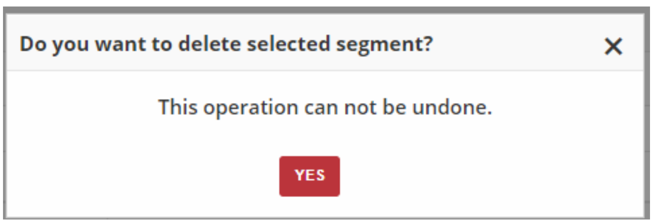
Customer can be assigned only to Active segments

Remove Segment

You can also delete Segment from the Admin.

To delete a Segment:

1. On the Admin sidebar, tap **Segments** Then, choose **All segments.**
2. In the Segments list, find the record to be deleted and click **Remove** ( ) icon in the Action column to delete the segment.
3. System display a message asked you to confirm the action. To confirm tap Yes



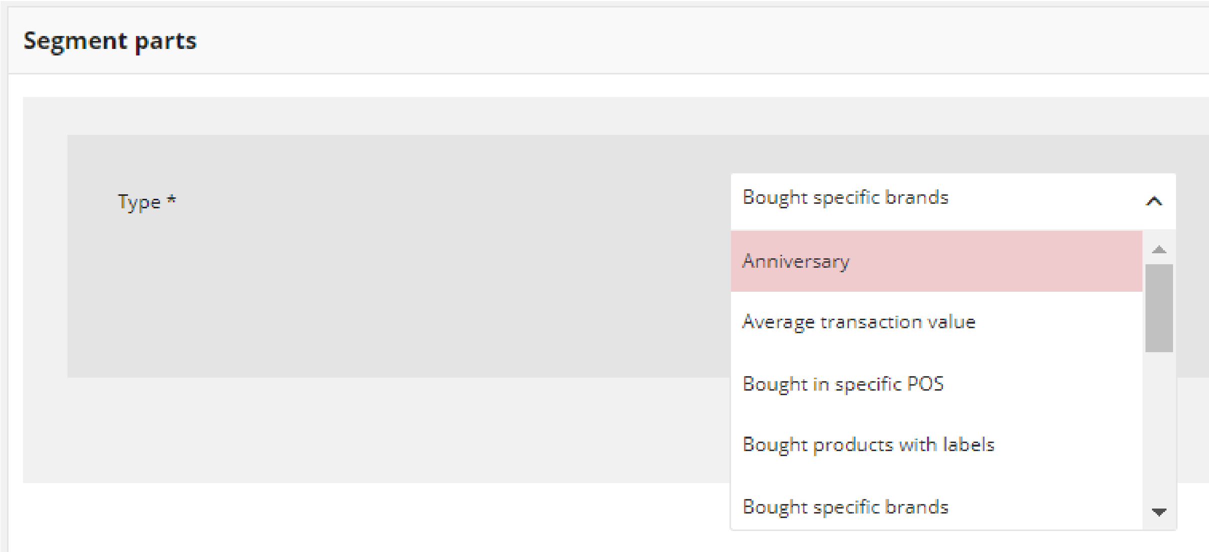
Removing Segment Action

CHAPTER 21:

SEGMENT PARTS TYPES

The assignment process is carried out by the application based on defined rules. Customers who meet all criteria will be assigned to the segment. The criteria consist of conditions that can be combined through AND (conjuction of sets) and OR (disjunction of sets) logical operators.

During creation of Segment you must specify Segment parts type, describing conditions for assigning customer. Every type has its own required fields that must be filled, to specified condition.



Segment Parts Types

Open Loyalty offer following standard types:

a. **Anniversary** – Customers who have registration/birthday anniversary in specify number of days

b. **Average transaction amount** – Customers whose average transaction value is between the limits

c. **Bought in specific POS** - Customers who made purchase in selected POS

d. **Bought products with labels** - Customers who bought products where label on product is one of the list

e. **Bought specific brands** – Customers who bought products of a given brand

f. **Bought specific SKU** – Customers who bought specific products (on the basis of selected SKU)

g. **Customer who has such labels** – Customers whose label on is one of the list

h. **Customers who has such labels value** – Customers whose labels value on is one of the list

i. **Last purchase was n days ago** – Customers who have made their last purchase n-days ago

j. **Purchase period** – Customers who made purchase (at least one) between the specified days

k. **Transaction count** – Customers whose number of purchases is within the defined range

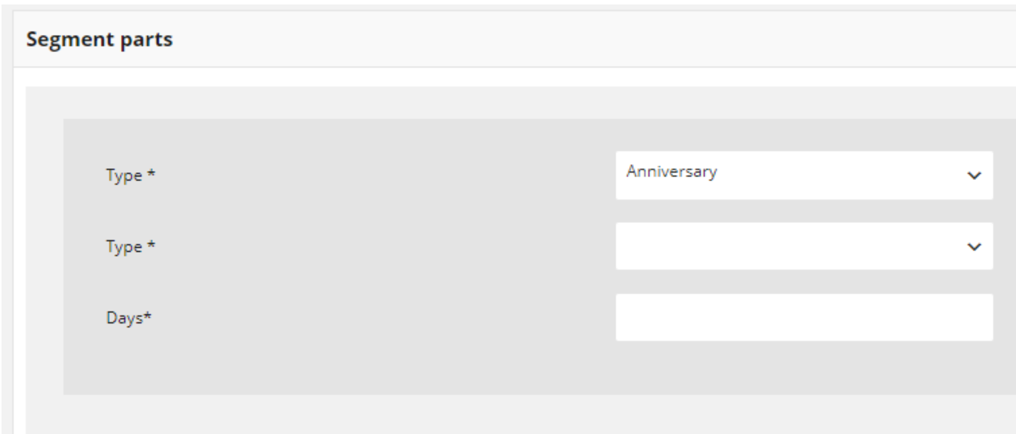
l. **Transaction percent in POS** – Customers whose number of purchases in a specified POS is within defined percent amount.

m. **Transaction value** – Customers whose overall amount of purchases is between the limits

Anniversary

Segment of customers who have registration or birthday anniversary in specify number of days . During creation, you need to specify whether to include dates of birth or registration dates and number of **days** before anniversary occurs.

For example, you can create segment of customers who have birthday within 14 days from today.



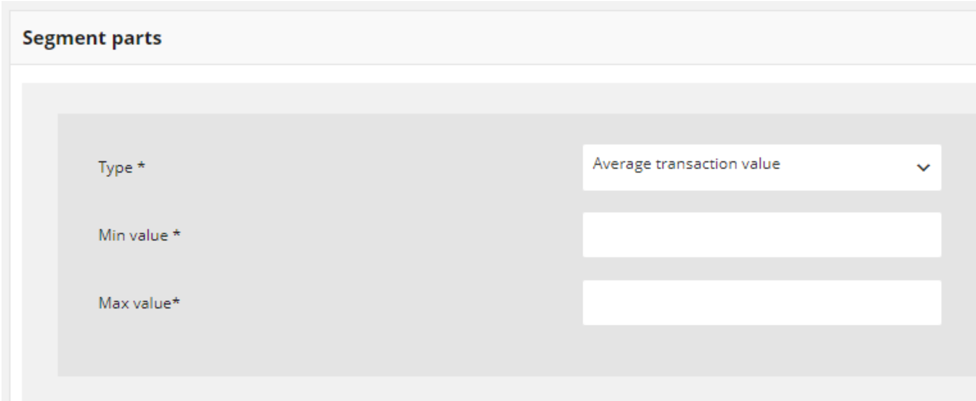
Anniversary Type

Field description

FIELD	DESCRIPTION
Type	Anniversary type. Options include: • Birthday • Registration
Days	Number of days before anniversary occurs For example, if **Days** is equal to 7 then all customer, with anniversary type within 7 days from today will be assigned to segment

Average transaction value

Segment of customers whose average transaction value is within the defined range. During creation, you need to specify **Minimum** and **Maximum** value to define the range in which the average transaction amount must be found.



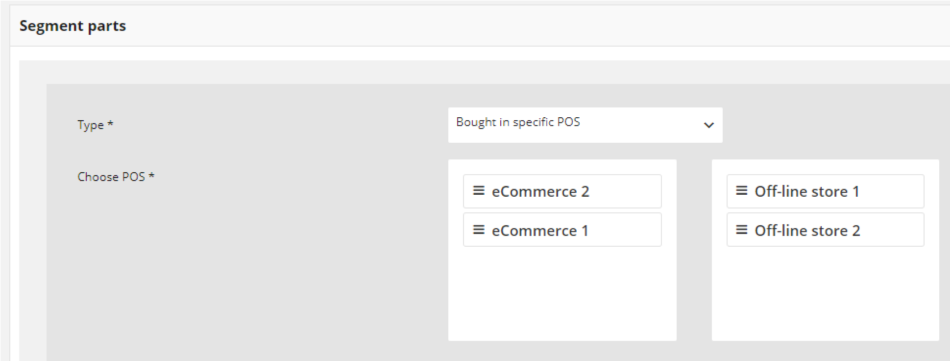
Average Transaction Value Type

Field description

FIELD	DESCRIPTION
Min value	Determines the minimum value of the average transaction amount of customer account
Max value	Determines the maximum value of the average transaction amount of customer account

Bought in specific POS

Segment of customers who have made purchase (at least one) in selected POS. During creation, you need to specify list of one or more stores (POS) that will be included. You create the list by drag the selected POS name from left column to the right one.



Bought in POS Type

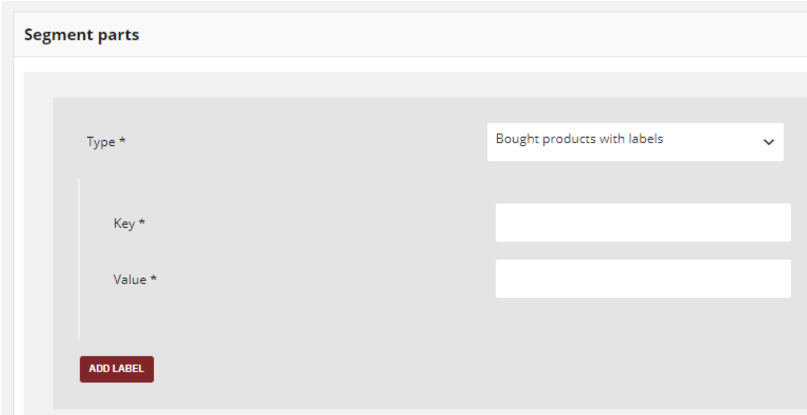
Field description

FIELD	DESCRIPTION
Choose POS	First column list all available POS within your Loyalty Program. Second column list all selected POS which transaction will be included. To choose POS drag the POS name to the second column.

Bought products with labels

Segment of customers who bought products where label on product is one of the list. Labels are key-value pairs that you can attach to a products. Each of list element has two values – **Key**, which is a label name, and **Value,** which is a label value. Both field need to be filled out.

Enter your key and value to add a product label. To apply additional labels, click **Add label**



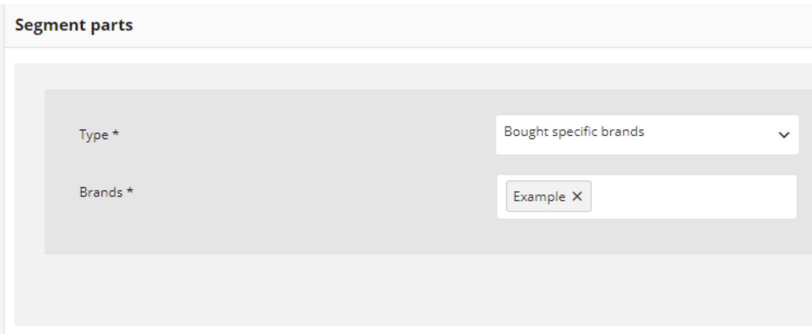
Bought Labels Type

Field description

FIELD	DESCRIPTION
Key	Product label name
Value	Value of product label with specified in previous step **Key**

Bought specific brands

Segment of customers who bought product or products of a given brand. During creation, you need to specify one or more **Brands** that will be included.



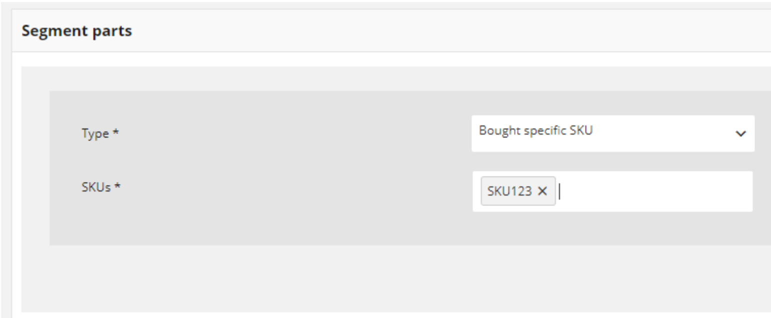
Bought Brands Type

Field description

FIELD	DESCRIPTION
Brands	Selected Brands

Bought specific SKU

Segment of customers who bought specific products (on the basis of selected SKU). During creation, you need to specify one or more **SKUs** that will be included.



Bought SKUs Type

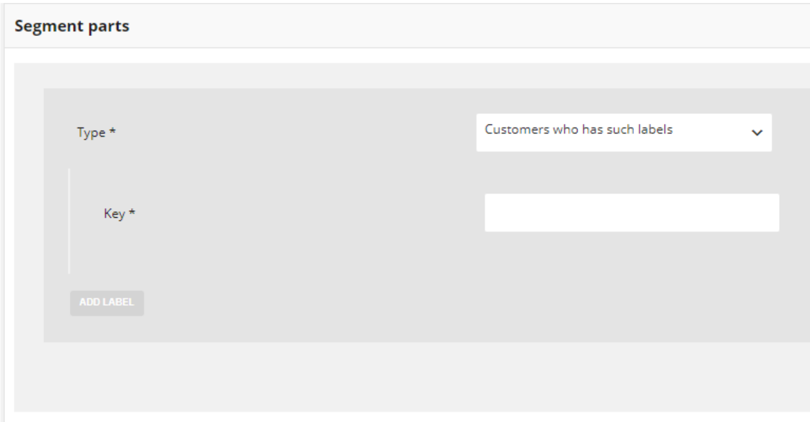
Field description

FIELD	DESCRIPTION
SKUs	Selected products

Customers who has such labels

Segment of customers whose label value on is one of the list. Labels are key-value pairs that you can attach to a customer during **customer account creation**.

Enter your label **Key** to add a customer label that will be included. To apply additional labels, click **Add label**



Customers Labels Type

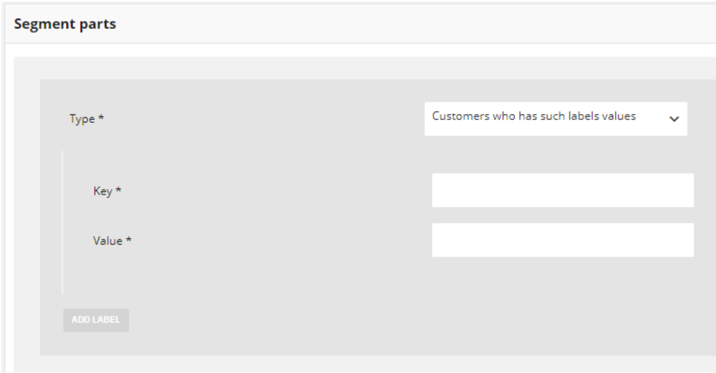
Field description

FIELD	DESCRIPTION
Key	Customer label name

Customers who has such labels value

Segment of customers whose label value on is one of the list. Labels are key-value pairs that you can attach to a customer during **customer account creation**. Each of list element has two values – **Key**, which is a label name, and **Value,** which is a label value. Both field need to be filled out.

Enter your key and value to add a customer label that will be included. To apply additional labels, click **Add label**



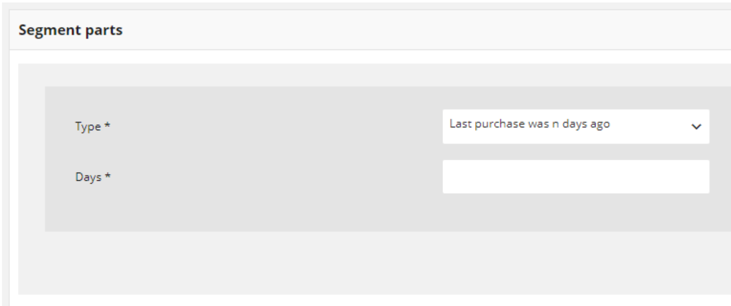
Customer Labels Value Type

Field description

FIELD	DESCRIPTION
Key	Customer label name
Value	Value of customer label with specified in previous step **Key**

Last purchase was n days ago

Segment of customers who have made their last purchase n-days ago. During creation, you need to specify number of **Days** back, that will be included.



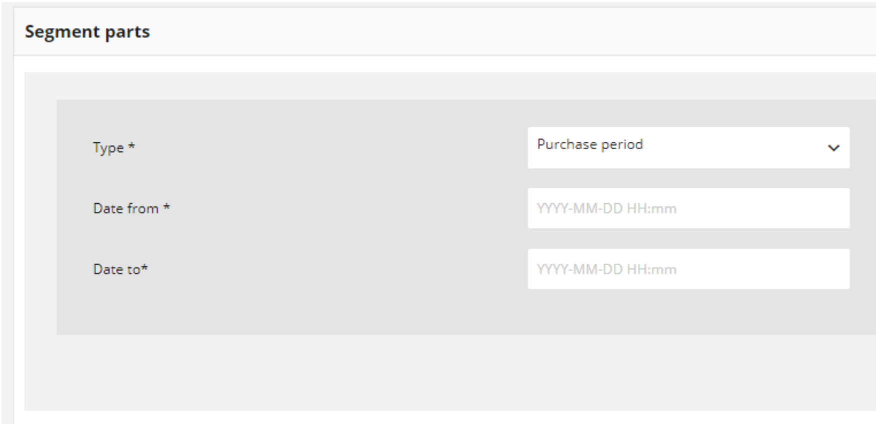
Last Purchase Type

Field description

FIELD	DESCRIPTION
Days	Number of days back For example, if **Days** is equal to 7 then all customers, who made their last purchase within 7 days back from today will be assigned to segment

Purchase period

Segment of customers who made purchase (at least one) between the specified date range. During creation, you need to specify the start and end date that will create a time boundaries from which purchases will be included.

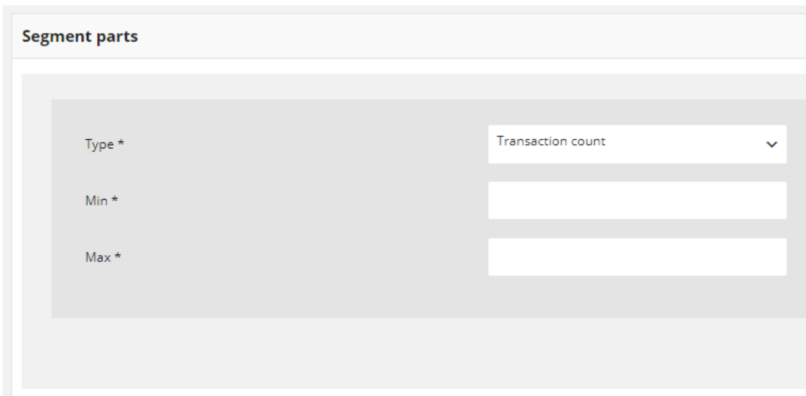


Purchase Period Type

FIELD	DESCRIPTION
Date from	Start date from which customers purchases will be included
Date to	End date until which customers purchases will be included

Transaction count

Segment of customers whose number of purchases is within the defined range. During creation, you need to specify **Minimum** and **Maximum** number to define the range in which the number of transactions must be found.



Transaction Number Type

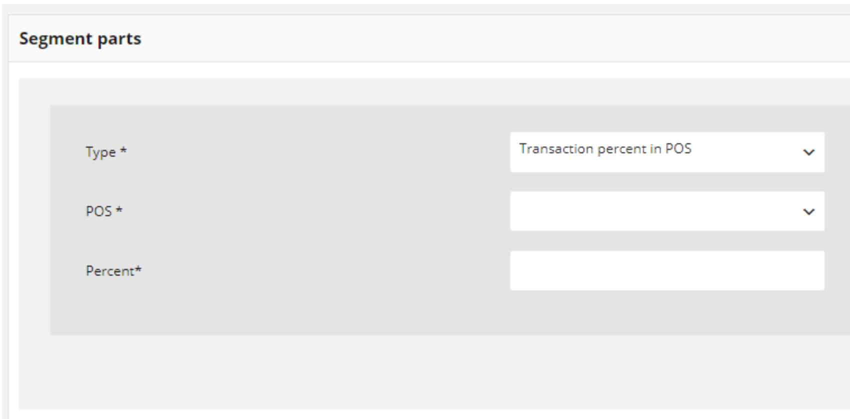
Field description

FIELD	DESCRIPTION
Min	Determines the minimum number of transactions of customer account
Max	Determines the maximum number of transactions of customer account

Transaction percent in POS

Segment of customers whose number of purchases in a specified POS is within defined percent amount. During creation, you must specify one **POS** (store) that will be included and transaction percentage to be analyzed within that POS.

For example, you can create a segment of customers whose 20% of all transactions are transactions in a given POS.



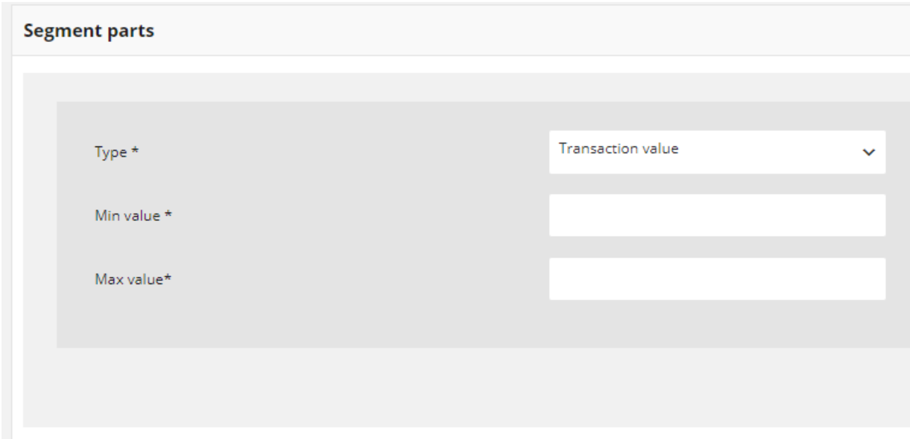
Transaction Percent Type

Field description

FIELD	DESCRIPTION
POS	Store which transaction will be included. To choose store select POS name from a dropdown list
Percent	Percent amount of transaction in a selected POS

Transaction value

Segment of customers whose overall amount of purchases is between the limits. During creation, you need to specify **Minimum** and **Maximum** value to define the range in which the value of all transactions must be found.



Transaction Value Type

Field description

FIELD	DESCRIPTION
Min value	Determines the minimum value of all transactions value of customer account
Max value	Determines the maximum value of all transactions value of customer ac-count

REWARD CAMPAIGNS

In this section of the guide you will be familiar with creating and managing rewards available within your Loyalty Program. You will learn what type of rewards can be choose, how to assigned reward to specify customers, define activity time and manage reward details. You will also learn how to verify which rewards have been already redeemed and by which customers.

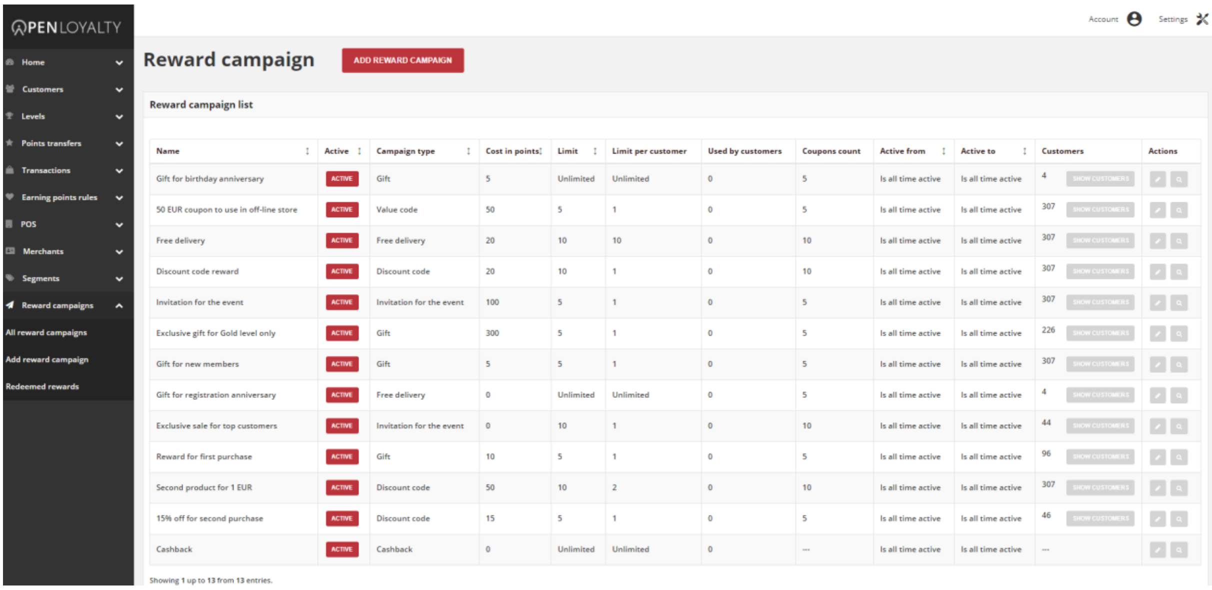
CHAPTER 22:

REWARD CAMPAIGNS MENU

Customers can redeem points toward various rewards, based on the cost in points of each that you establish during reward creation. When customer reaches the defined amount of points, points can be spent for a reward. Redeemed reward appears automatically in Redeemed rewards menu. During creation you can specify for each reward e.g.:

- How many points customer need to spent to get reward
- How many times rewards can be used by one customer
- How many times reward can be used during all campaign
- To which customer reward will be visible and ready to use
- Time boundaries when reward will be active
- Reward value

For example, a coupon code can be created for a specific customer group, or for anyone who makes a purchase over a certain amount (segment). To apply the coupon to a purchase, the customer can enter the coupon code in your online store, or possibly at the cash register of your offline store.

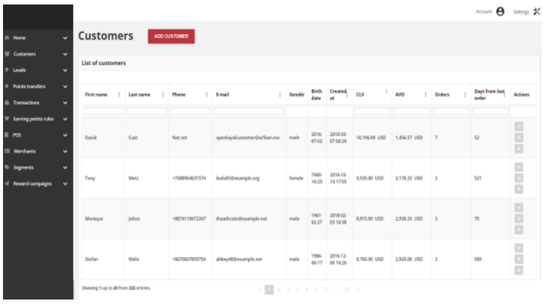


Reward Campaign Menu

To display the Reward campaigns menu:

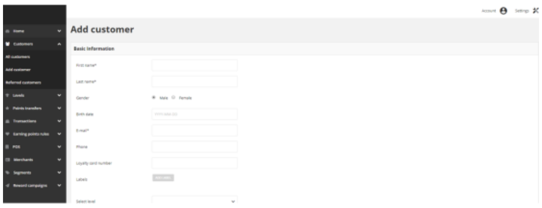
On the Admin sidebar, tap **Reward campaigns** , then choose **All reward campaigns**.

Menu options



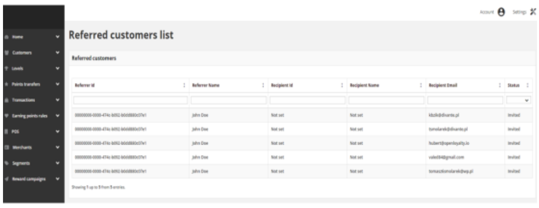
All reward campaigns

Lists all rewards within your loyalty program, with additional information about its type, activity, limits, points costs and customers who can redeem each reward.



Add reward campaign

Lists all data that need to be filled out to add new reward to your Loyalty Program

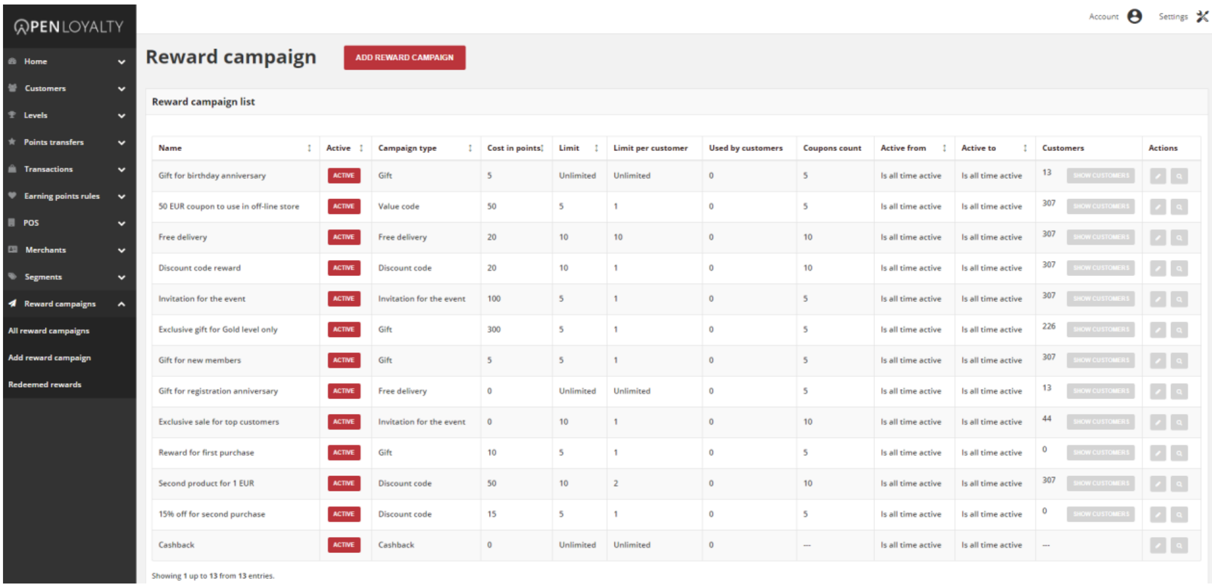


Redeemed rewards

Lists all redeemed rewards with additional information who and when redeemed reward and it's status – delivered or used.

All reward campaigns

The All reward campaigns grid provide information about all rewards within your Loyalty Program with information about type, status, cost in points, limits of use, if and how many times reward has been used by customers and time boundaries of activity. Moreover, you can also see how many customers could use reward and preview theirs details.



All Reward Campaigns

Use the standard controls to sort the list and apply actions to selected rewards record (modify, preview details). Pagination controls appear if there are more rewards records than fit on the page, and are used to move from one page to the next.

Field description

FIELD	DESCRIPTION
Name	Name of the reward
Active	Reward campaign current status. It has higher priority than time ***Activity*** Option include: Active/Inactive. Customer can redeem only Active reward.
Campaign type	Reward type. Option include: • Cashback • Discount code • Free delivery • Gift • Invitation for the event • Value code
Cost in points	How many points Customer must spend to redeem reward

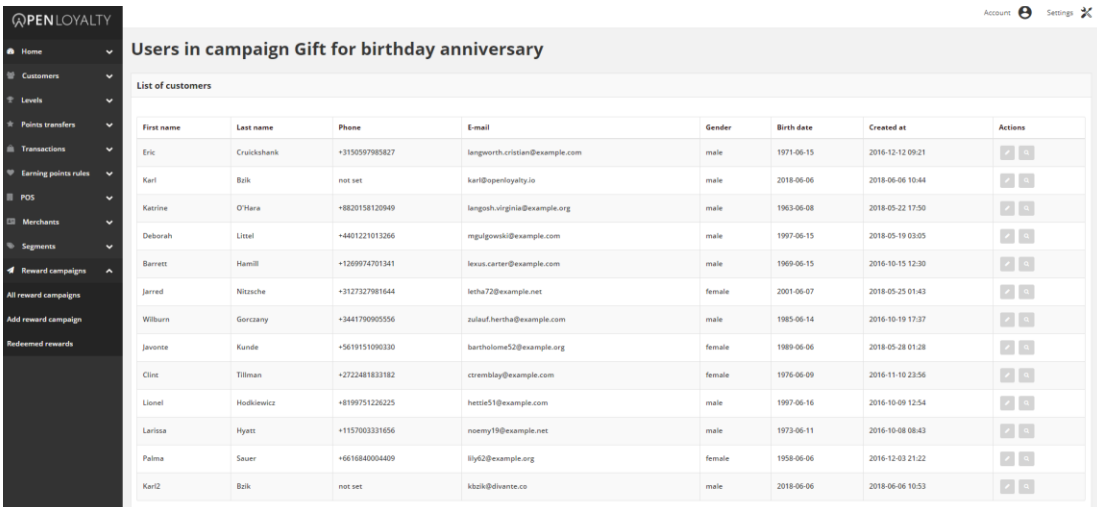
Limit	Information about limit the redeem of rewards globally.
Limit per customer	Information about limit the redeem of rewards by one customer
Used by customers	Information how many times reward has been redeemed
Coupons count	Information about number of coupons available to redeem
Active from	Day from which reward is active, so visible and available to use for customers
Active to	Day until reward can be redeem. After that day reward will not be visible for customer and unavailable to use
Customers	Show number of customers who could redeem reward. After **Show customers** click, list of these customer details will be shown.
Actions	The operations that can be applied to selected reward. Options include: • Edit reward details • View reward details

Customers assigned to reward

You can simply view not only the number but also the list of customers with details who could redeem reward.

To display the list of customers:

1. On the Admin sidebar, tap **Reward campaigns**. Then, choose **All reward campaigns**.
2. In the Reward campaigns list, find the reward you want to see customers list and click **Show customers** in the **Customers** column. After clicking, the list of customers will be opened, filtered according to the selected reward.



List of Customers in Reward Campaign

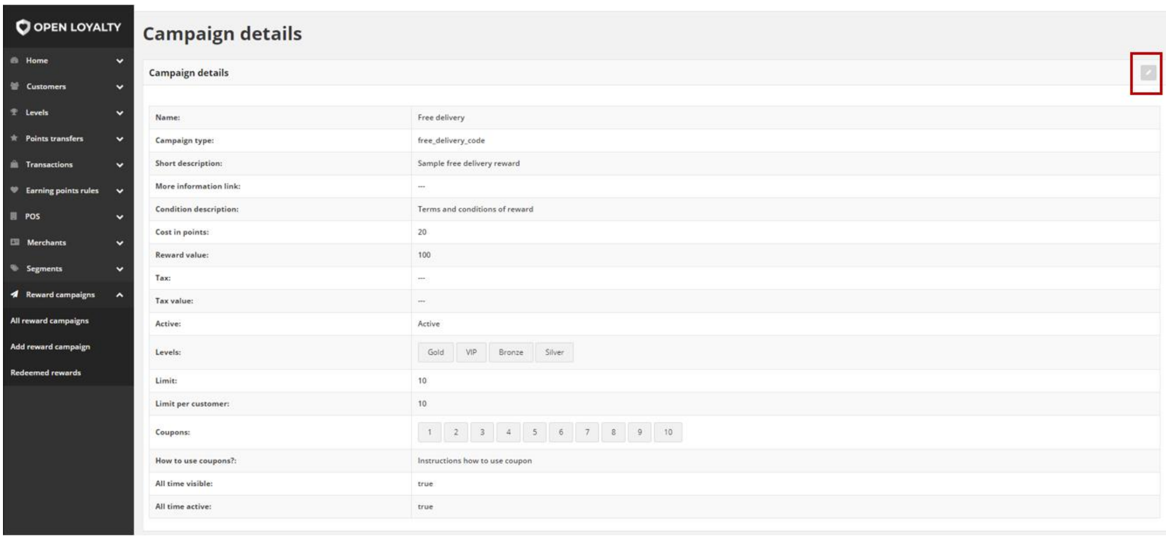
Use the standard controls to sort the list and apply actions to selected customers (edit and view). Pagination controls appear if there are more customer records than fit on the page, and are used to move from one page to the next.

Reward campaign details preview

You can see details of each reward campaign directly from All reward campaigns menu. Campaign details include all data provided during **creation process.**

To view reward detail information:

1. On the Admin sidebar, tap **Reward campaigns**. Then choose **All reward campaigns.**
2. In the Reward campaign list, find the reward to be preview and click **View** ( ) icon in the Action column to open the reward in view mode.
3. If applicable, you can simply go to ***edit mode*** to change previewed reward data by clicking **Edit** ( ) icon in the upper right corner



Campaign Details Preview

Field description

FIELD	DESCRIPTION
Name	Name of the reward
Campaign type	Reward type. Option include: • Cashback • Discount code • Free delivery • Gift

	• Invitation for the event • Value code
Short description	Brief description of the reward
More information link	URL to linked page with more information about the reward
Condition description	Brief description of the conditions of getting a reward
Cost in points / Point value	1) **Point value** displayed only when ***Cashback*** is selected. Monetary value of the points to define the number of points that can be applied as a refund towards the amount of order 2) **Cost in points** displayed for any **other campaign type**. Number of points represented by the reward to define how many points customer needs to spend to get a reward
Reward value	Value of reward
Tax	Percentage value of tax for reward
Tax value	Value of tax for reward
Active	Reward campaign status. Option include: Active/Inactive
Levels / Segments	Identify the customer group that qualifies to receive the reward 1) **Levels** are displayed when Campaign target type is Level 2) **Segments** are displayed when Campaign target type is Segment
Limit	Define how many coupon codes could be used during time boundaries when reward is available. Not displayed when: • Usage of code number is unlimited • Cashback is selected
Limit per customer	Define how many coupon codes could be used by one customer during time boundaries when reward is available. Not displayed when: • Usage of code number is unlimited • Cashback is selected
Coupons	List of Coupon codes to use by Customer. Not displayed when Cashback selected.
How to use coupons?	Description how Customer can use discount code. Not displayed when Cashback selected.
All time visible	Define is reward always visible for customers on the storefront. Options include: true/false
All time active	Define is reward always available for customers to choose and use. Options include: true/false

Redeemed rewards

Redeemed reward is an instance of reward that Customer has bought with Points or earned for performing specified action.

There is possibility to get:

- virtual reward - as a Discount or Value Code, free delivery
- physical reward - which will be send to Customer, e.g. printed coupon, gift, etc.
- cashback

Not enough points

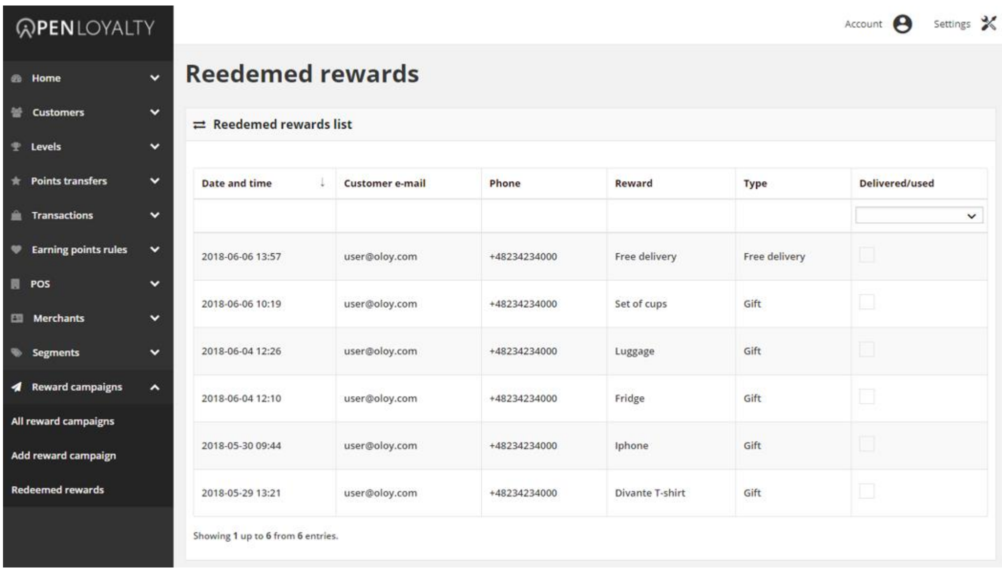
If Customer does not have enough points to redeem reward then Redeem reward button will be disabled (greyed out).

When mouse hover over disabled button then tooltip will show "You must have <<reward cost - customer active points>> more points to get reward.".

Redeemed reward from Admin perspective

Redeemed reward management could be performed only from Administrator Cockpit by user who has Admin privileges.

Redeemed rewards list grid provide an information about which customer and when redeemed given reward. Moreover, you can check whether reward is **Delivered** (customer choose reward and spent points but he has not used it yet) or **Used** (customer used coupon code during purchase, gift was sent to customer etc.)



Redeemed Rewards

Use the standard controls to sort the list by ***Date and time*** and filter list to get a register of reward that are ***Delivered*** or ***Used***. By default Redeemed rewards grid show both – delivered and used reward. Pagination controls appear if there are more redeemed rewards records than fit on the page, and are used to move from one page to the next

To see all Redeemed rewards:

1. On the Admin sidebar, tap **Reward campaigns**. Then choose **Redeemed rewards.**

Field description

FIELD	DESCRIPTION
Date and time	Date when reward was redeemed
Customer e-mail	Email address of customer who redeemed reward. E-mail address is used as an identification factor to verify which customer choose particular reward.
Phone	The customer's phone number. Can be used also as an identification factor.
Reward	Name of the reward
Type	Reward type. Option include: • Cashback • Discount code • Free delivery • Gift • Invitation for the event • Value code
Delivered/Used	Redeemed reward statuses. Option include: • Delivered – blank checkbox • Used – marked checkbox To learn how to select reward as a used, see **Mark Redeemed rewards as used**

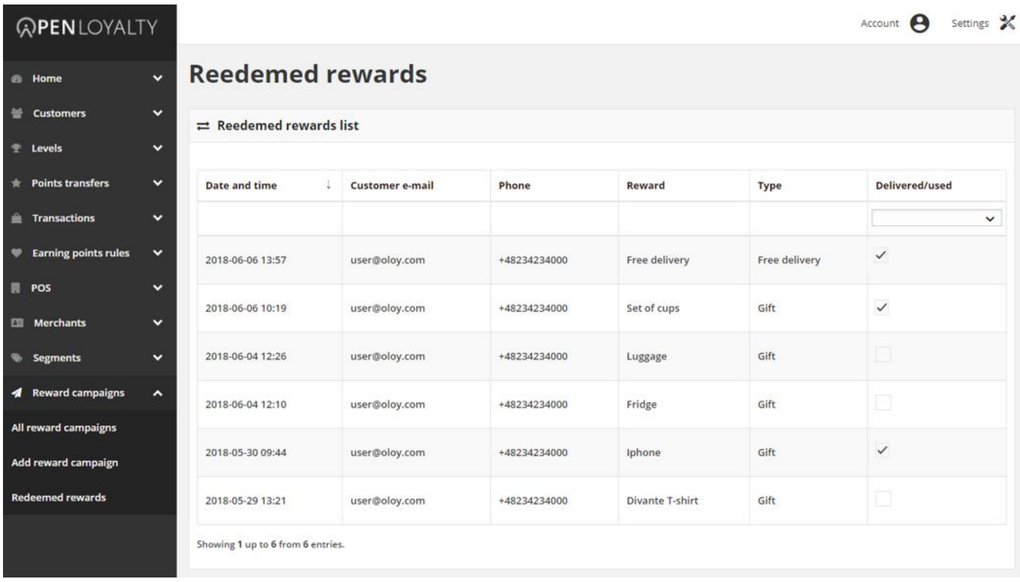
Mark Redeemed reward as used

From the Admin you can mark selected redeemed reward record as a Used, when customer used coupon code during purchase, you sent gift which customer selected from his cockpit etc.

On the Redeemed rewards list, **Used** rewards will have a marked checkbox in the column Delivered/used, unlike to those **Delivered**, which will have an empty checkbox.

To mark reward as a used:

1. On the Admin sidebar, tap **Reward campaigns**. Then, choose **Redeemed rewards**.



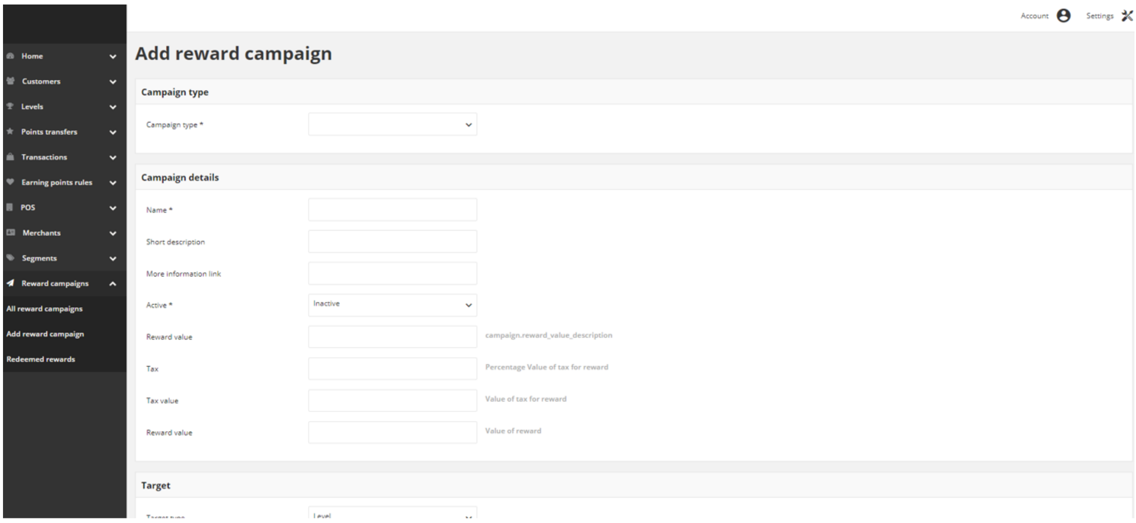
Delivered/used Redeemed Rewards

2. In the Redeemed reward list list, find the reward you want to mark as Used and click checkbox in the **Delivered/used** column.

CHAPTER 23:

CREATING REWARD CAMPAIGN

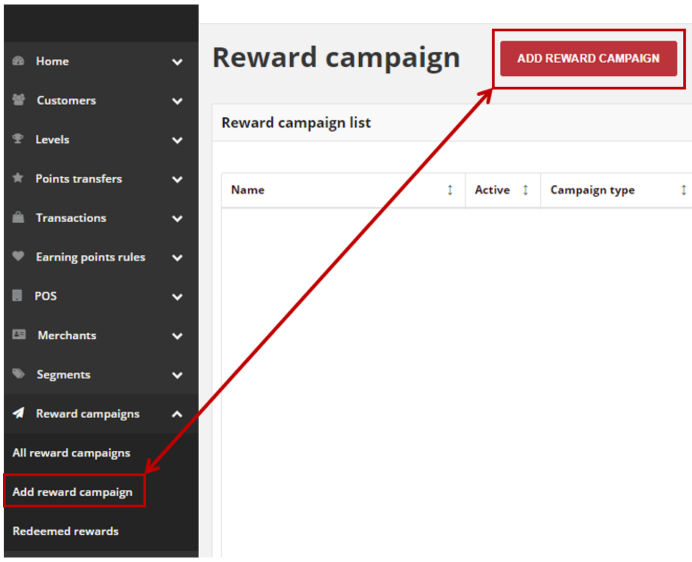
Open Loyalty Reward campaigns gives you the ability to create unique rewards that customer can be awarded for a wide range of transaction and activities within your loyalty program. During creation you determine time boundaries, when reward is available for customer, customers groups for whom the reward is available and defines the basic operating parameters.



Add New Reward

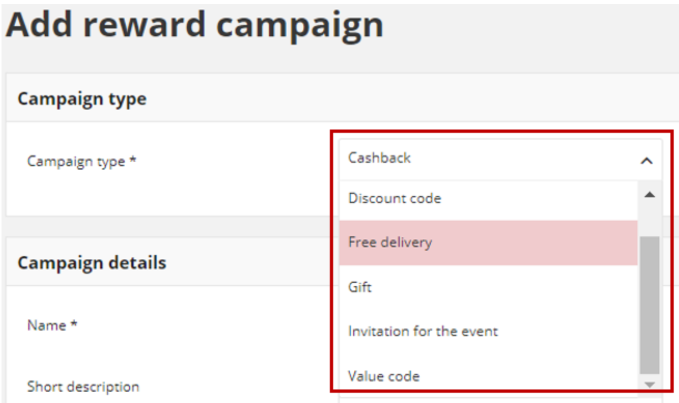
To create a New Reward Campaign:

1. On the Admin sidebar, tap **Reward campaigns**. Then, choose **Add reward campaign**. You can also add new reward directly from **All reward campaigns** list by clicking **Add reward campaign** at the top of the page.



Add Reward Options

2. In the **Campaign type** section, select a reward type from a dropdown list, to one of the following:

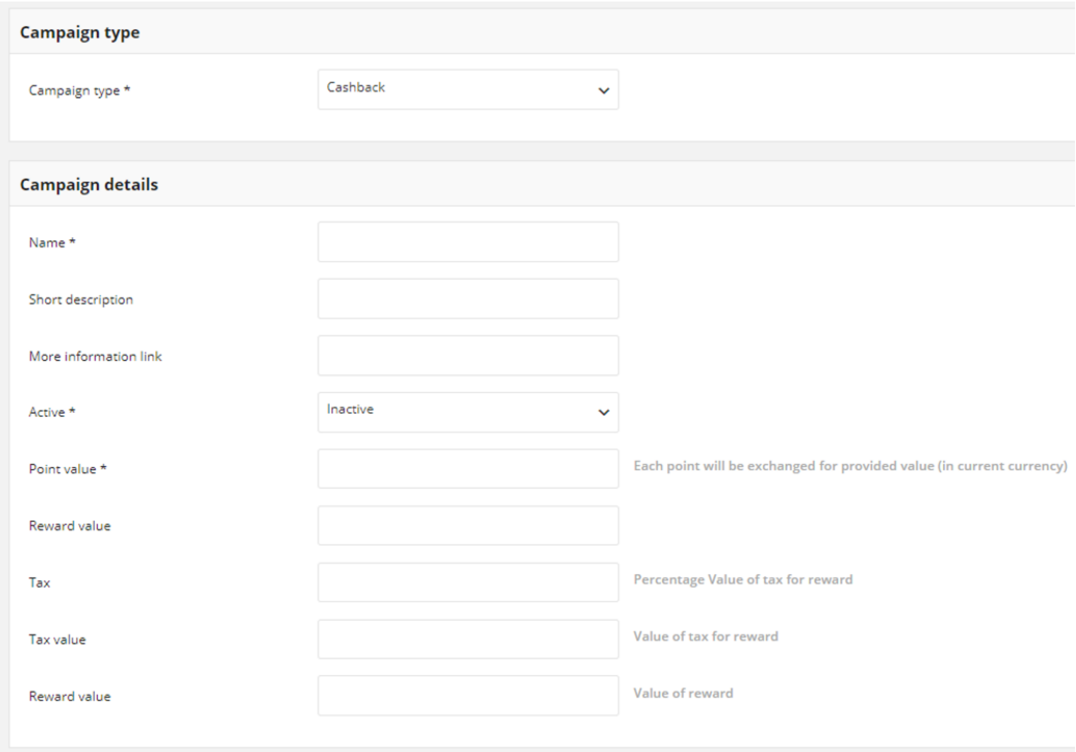


Campaign Type

Cashback	cash refund for customer bank account after making their purchase
Discount code	percentage discount applied to reduce order amount, e.g. 25% off for next purchase
Free delivery	free shipping promotion
Gift	material article offer as a present (without payment)**,** e.g. book
Invitation for the event	invitation for business & corporate events or other depending on your business, e.g. conference
Value code	value discount applied to reduce order amount, e.g. 25 EUR off for next purchase

Depending on the selected **Campaign type**, a next section -**Campaign details** will display different fields to filled in. Different fields are required for Cashback, than for other types i.e. discount code, free delivery etc.

3. When you <u>choose</u> ***Cashback***, In the Campaign details section do the following:



Cashback Campaign Details

a. Enter unique reward **Name**

b. If needed, provide a **Short description** of the reward campaign

c. If needed, enter URL to the content page in **More information link** field, that explains your reward campaign.

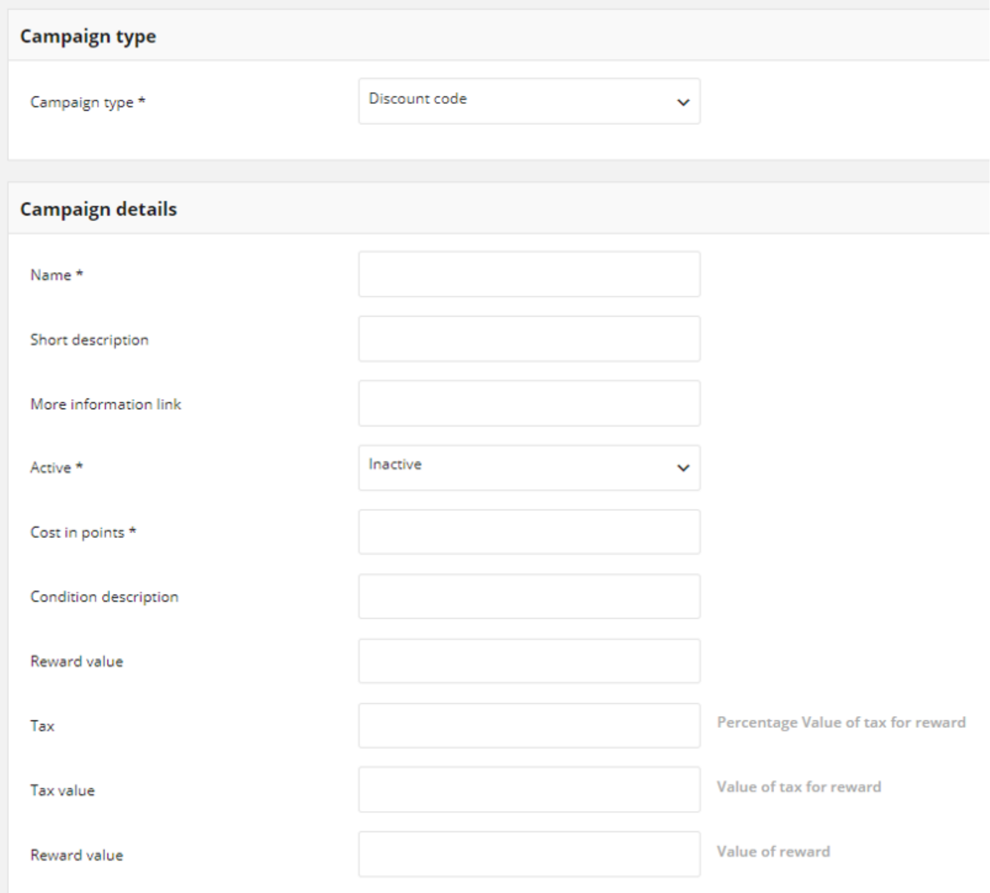
d. To make reward available for customer, in **Active** field select status "**Active**" from the dropdown list

e. In **Point value** field, enter the monetary value of the points to define the number of points that can be applied as a refund towards the amount of order

f. If applicable, In **Reward value** field provide a monetary value of reward for better explanation of defined ***Point value***

g. If needed, enter **Tax** rate that applies to the reward, monetary value of tax for reward in **Tax value**

4. When you choose any other than ***Cashback***, in the **Campaign details** section do the following:



Campaign Details

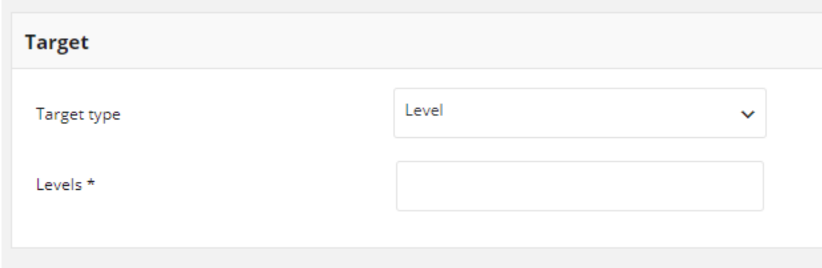
h. Repeat steps **a-d** from point **3,** and provide reward:
   - Name
   - Short description, if needed
   - More information link, if needed
   - Status

i. In **Cost in points** field, enter the number of points represented by the reward to define how many points customer needs to spend to get a reward.

j. If applicable, in **Condition description** field, provide a description of the conditions of getting a reward

k. Repeat steps **f-g** from point **3**, and provide:
   - Reward value description
   - Tax
   - Tax value
   - Reward value if needed

5. A reward can be extended to members of a specific customer group. In the **Target** section identify the customer group that qualifies to receive the reward:

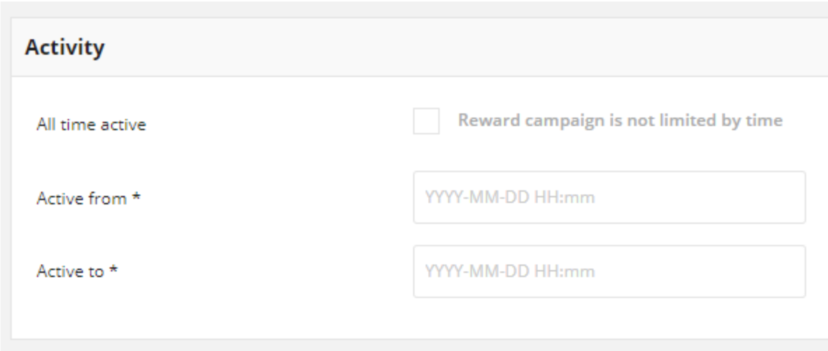


Target

a. In **Target type** field, select from dropdown list Level or Segment to specify whether the reward will be available for customers assigned to particular level or segment

b. Depending on selected ***Target type***, field **Segments** to specify segments or **Levels** to specify levels appear. You can choose one or more levels/segments to used

6. **Activity** section define time boundaries when reward can be used by customers. To make the reward available for a limited period of time, complete the From and To dates in **Activity** section:



Activity

a. In **Active from** field set the first date the reward is available. You can either enter the date or select it from the calendar.

b. In **Active to** field set the last date the reward is available. You can either enter the date or select it from the calendar.

   Active to and ***Active from*** fields are available only when reward activity (availability) is limited.

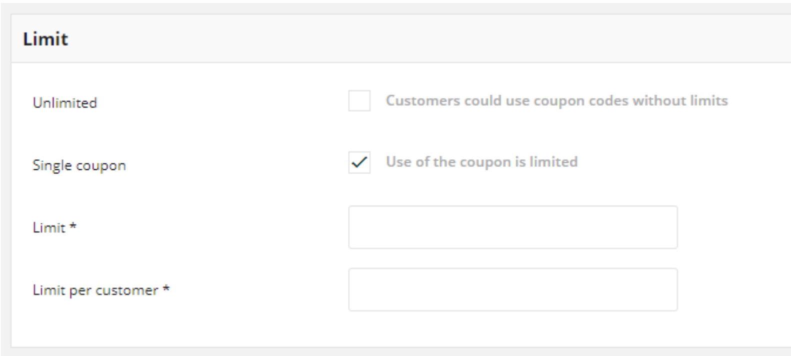
c. If you want the reward to be active all the time mark **All time active** checkbox. When you choose that option ***Active from*** and ***Active to*** fields will not be available.

Status of the Reward campaign (Active/Inactive) has higher priority than time boundaries from Active section.

Even if time boundaries from Activity section will be valid, changing Status to Inactive means that reward will not be available to customers.

7. When you choose <u>any other Campaign type than</u> ***Cashback*** additional sections to filled in appear.

8. To limit the number of times each customer can use the coupon, enter the number of usage limits in **Limit** section:



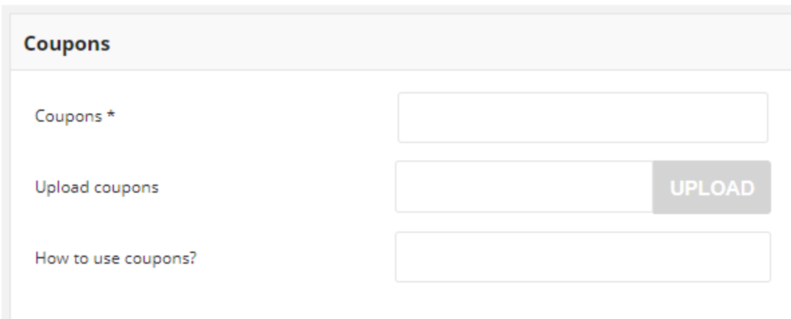
Limit

   a. To limit the number of times the coupon can be used, complete the following:

      - Mark **Single coupon** checkbox
      - In **Limit** field, define how many reward codes could be used during time boundaries from Activity section
      - In **Limit per customer** field, define how many reward codes could be used by one customer during time boundaries from Activity section.

   b. For unlimited use, mark **Unlimited** checkbox. When you choose that option ***Limit*** and ***Limit per customer*** fields will not be available

9. Add batch of coupons to be used with the reward:

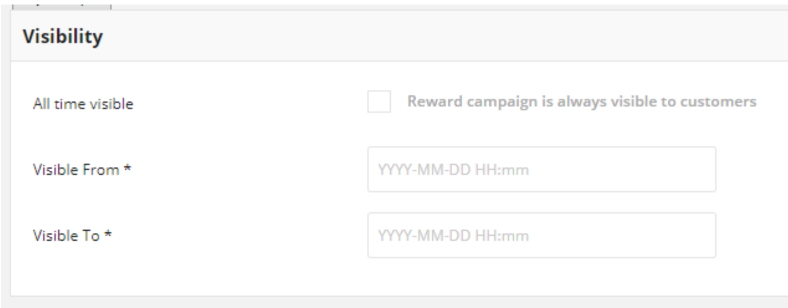


Coupons

a. Select from dropdown list a **Coupons** codes to be used by customer or **Upload coupons** list of codes from CSV file.

b. If applicable, enter description how to use coupons codes, to display instructions for customers on the storefront.

10. To make the reward visible on the storefront for a limited period of time, complete the From and To dates in **Visibility** section:



Reward Visibility

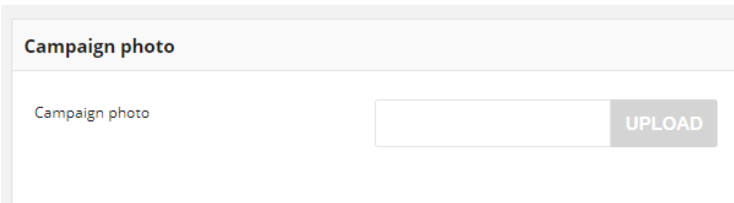
a. In **Visible from** field set the first date the reward is visible. You can either enter the date or select it from the calendar.

b. In **Visible to** field set the last date the reward is visible. You can either enter the date or select it from the calendar.

Visible to and ***Visible from*** fields are available only when reward visibility is limited.

c. If you want the reward to be visible all the time mark **All time visible** checkbox. When you choose that option ***Visible from*** and ***Visible to*** fields will not be available.

11. If applicable, in **Campaign photo** section upload reward image that will be visible on the storefront



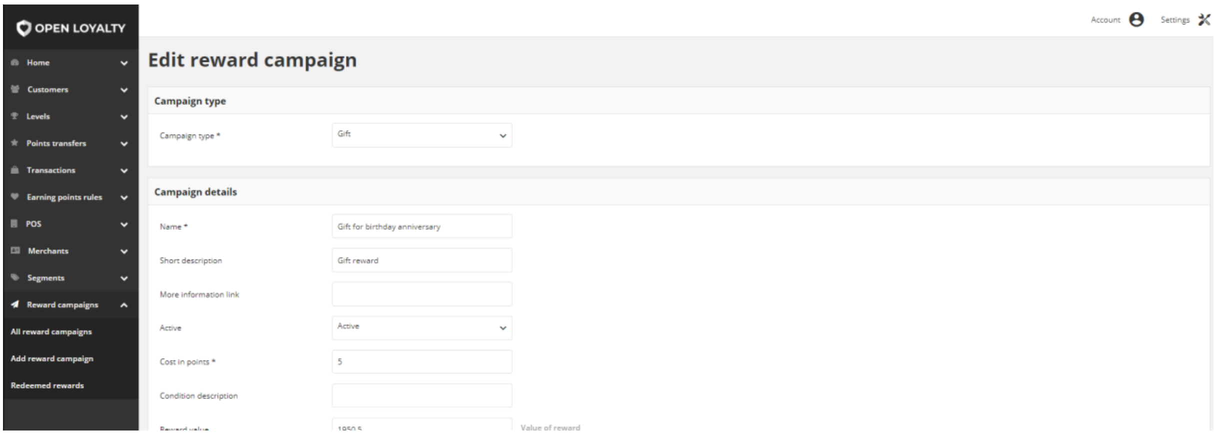
Reward photo

12. When complete, tap **Save**

Image size is limited to 2MB. Image dimensions could not be smaller than 600 x 600 px. Allowed file formats: png, gif, jpg.

Updating reward data

You can edit all data provided during Reward campaign creation process. You can update reward data by selecting it's record from **All reward campaigns** list.



Reward Campaign Edition

To edit a Reward campaign:

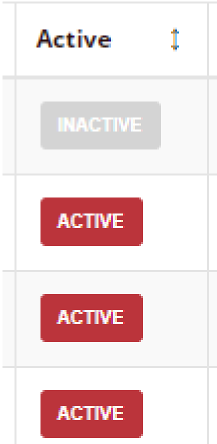
1. On the Admin sidebar, tap **Reward campaigns**. Then, choose **All reward campaigns**.
2. In the ***Reward campaign list***, find the reward to be edited and click **Edit** ( ) icon in the Action column to open the reward campaign in edit mode.
3. Make any necessary changes to the reward data
4. When complete, tap **Save**

Activate/deactivate Reward campaign

Any reward from the list can be activated and deactivated by Admin user.

To activate/deactivate Reward:

1. On the Admin sidebar, tap **Reward campaigns**. Then, choose **All reward campaign**. You can also deactivate/activate reward from **Edit mode**
2. In the Reward campaign list, find the reward to be deactivated and click **Active** in the **Active** column. The button in the column change to ***Inactive*** and appear as a grey-out.



Active Column

When you deactivate reward campaigns, customer will not be able to see it on the storefront and use.

3. To activate the reward click **Inactive** in the **Active** column. The button in the column change to ***Active*** and appears as a red.

Customer can use only Active reward campaigns

Conditions of reward availability to Customer:

1. Campaign must be **Active**.
2. Campaign must be **Visible** (if visibility is limited in time).
3. Customer is **assigned to Segment/Level** which are selected in Reward Campaign configuration.
4. There are available **coupon codes** (non used) for the campaign or campaign is not limited with single coupon code.
5. If there is option to **limit** coupon per campaign then reward is available when usage count is below limit.
6. If there is option to **limit** coupon per user then reward is available when usage count is below limit.