



**BPA Touch Screen POS  
Loyalty Program**

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## SUMMARY

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One of the great features of Business Plus Accounting Touch POS is the built in loyalty programs. Loyalty programs are a great way to encourage customers to return to your business. The Touch POS software offers 3 different loyalty programs to choose from. You can choose which one works best in your application. The three programs that are offered are:

1. Purchase Discount – By spending a certain amount of money in your business, customers can receive a discount on each subsequent order. For instance, you can set up the program so that once they spend \$500 they receive 5% off and after \$1000 they receive 10% off all orders, etc.
2. Loyalty Credits – Reward your customers for purchases by accruing a dollar amount that can later be redeemed at your business. For example; for every \$10 they spend they receive \$1 in credits that can be redeemed.
3. Punch Card Program – This program works much like a standard punch card except for the system tracks the punches for you. You simply set up a list of products and after a certain number of purchases the customer gets one product free.

The Touch POS software was designed to track loyalty credits using loyalty cards available through Business Software Solutions. These cards can be designed and printed with your logo. Please contact our sales department at (801) 336-3303 for pricing.

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## PROCEDURES

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- 1) [Configure Loyalty Program](#)
- 2) [Create Customer Accounts](#)
- 3) [Associate Sale With Customer Account](#)
- 4) [Redeem Loyalty](#)
- 5) [Reporting](#)

## CONFIGURE LOYALTY PROGRAM

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To configure loyalty, go to **Touch Screen POS>POS Manager Functions>Customer Loyalty**. You will see tabs at the top for each program that is available.

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### CONFIGURING PURCHASE DISCOUNTS

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If you choose to use the purchase discount loyalty program, do the following:

- 1) Change **Activate Loyalty Discounts** to "Y".
- 2) Enter the start date for the loyalty program.
- 3) Enter the dollar amount and the discount that will be given for each increment. Remember that the percent discount is a continuous discount and not a one-time discount. In the example below, once a customer has spent \$500 they will receive a 5% discount on every order until they have spent \$1000, in which case they will get a 10% discount.
- 4) Select Save.

The screenshot shows a software window titled "Customer Loyalty" with three tabs: "Purchase Discount", "Loyalty Credits", and "Punch Card Programs". The "Purchase Discount" tab is active. Below the tabs, there is a descriptive text: "This loyalty program allows a customer to get a discount based on the dollars spent by the customer. To use this program you must enter customer account numbers in the restaurant POS screen". Below this text, there are several input fields: "Activate Loyalty Discounts:" with a dropdown menu set to "Y"; "Start Date For Loyalty Discounts:" with a date field set to "03/20/2012"; and a table of dollar amounts and discount percentages. At the bottom of the window, there are "Save" and "Cancel" buttons.

Dollar Amount:	Discount Percent If Customer Is Over Dollar Amount (0-99%):
500.00	5
1000.00	10
2000.00	15
4000.00	20

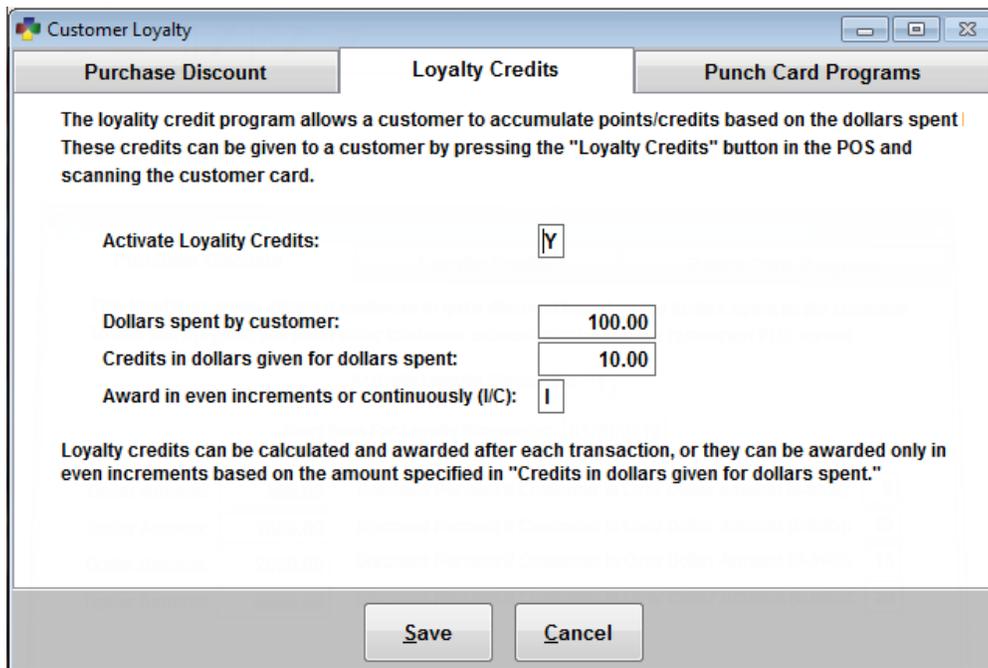
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## CONFIGURING LOYALTY CREDITS

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If you choose to use the loyalty credit program, do the following:

- 1) Change **Activate Loyalty Credits** to "Y".
- 2) Enter the dollar amount the customer must spend and the dollar amount of credit they will receive.
- 3) Choose whether to award credits incrementally or continuously. In the example below we have set our amounts at \$100 the customer must spend in order to receive \$10 in credit. Incrementally means the customer will receive no credit until they have spent at least \$100. Continuously means credits will be rewarded for each transaction. If a customer spends \$10 they will still receive \$1 credit.



The screenshot shows a software window titled "Customer Loyalty" with three tabs: "Purchase Discount", "Loyalty Credits" (selected), and "Punch Card Programs". The "Loyalty Credits" tab contains the following text and controls:

The loyalty credit program allows a customer to accumulate points/credits based on the dollars spent. These credits can be given to a customer by pressing the "Loyalty Credits" button in the POS and scanning the customer card.

Activate Loyalty Credits:  Y

Dollars spent by customer:

Credits in dollars given for dollars spent:

Award in even increments or continuously (I/C):  I

Loyalty credits can be calculated and awarded after each transaction, or they can be awarded only in even increments based on the amount specified in "Credits in dollars given for dollars spent."

At the bottom of the window are two buttons: "Save" and "Cancel".

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## CONFIGURING THE PUNCH CARD PROGRAM

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If you choose to use the punch card program, do the following:

- 1) Select **New Program** and name the program.
- 2) Enter the number of items that must be purchased to receive a free item.
- 3) Select OK
- 4) Verify that Program is active is set to “Y”
- 5) Select **Add Product**
- 6) From the pick list, select the product you would like to add to the program and select **Pick This Record** at the bottom.
- 7) Continue adding products to the list. In our example we are only using one product. If you are using this program for something like drinks, you will need to add all of your drink products to the list.
- 8) Select Save.

The screenshot shows a software window titled "Customer Loyalty" with three tabs: "Purchase Discount", "Loyalty Credits", and "Punch Card Programs". The "Punch Card Programs" tab is active. Below the tabs, there is a text box explaining punchcard groups. The "Punch Card Program:" dropdown menu is set to "Yogurt". To the right are "New Program" and "Delete Program" buttons. Below that, "Purchased required for free item:" is set to "10" and "Program is active:" is set to "Y". A table titled "Products included in program:" contains one row with "YOGURT" in the "Product ID" column and "Yogurt" in the "Description" column. To the right of the table are "Add Product" and "Remove Selected Product" buttons. At the bottom of the window are "Save" and "Cancel" buttons.

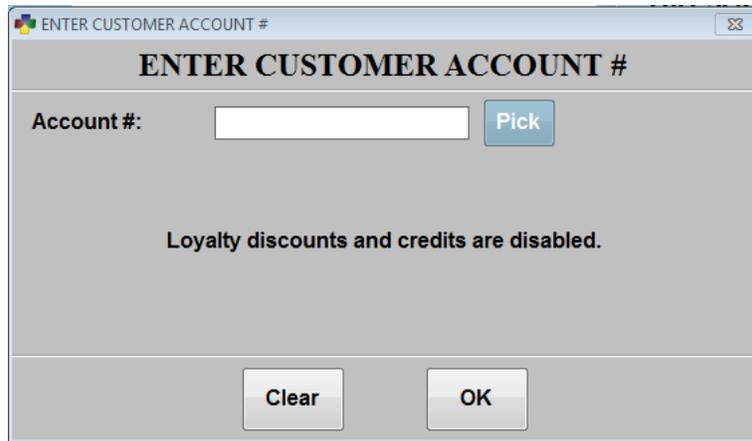
Product ID	Description
YOGURT	Yogurt

## CREATE CUSTOMER ACCOUNTS

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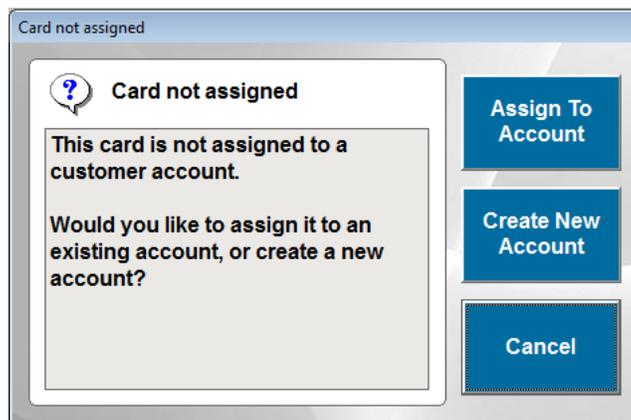
Once you have set up your loyalty program you are ready to begin creating customer accounts and handing out cards. Each card must be associated with a customer account before it can be used. To begin this process, do the following:

- 1) Go to **Touch Screen POS>POS Sales**
- 2) Cashier in
- 3) Click customer loyalty and swipe a loyalty card.



The screenshot shows a dialog box titled "ENTER CUSTOMER ACCOUNT #". It features a text input field labeled "Account #:" with a "Pick" button to its right. Below the input field, a message states "Loyalty discounts and credits are disabled." At the bottom of the dialog, there are two buttons: "Clear" and "OK".

- 4) Select **Create New Account** unless the customer already has an account.



The screenshot shows a dialog box titled "Card not assigned". It contains a question mark icon and the text "Card not assigned". Below this, a message reads: "This card is not assigned to a customer account. Would you like to assign it to an existing account, or create a new account?". On the right side of the dialog, there are three buttons: "Assign To Account", "Create New Account", and "Cancel".

5) Enter as much customer information and you would like and select Save.

The screenshot shows a software window titled "New Customer" with a blue header bar. Below the header, the text "CUSTOMER INFORMATION" is displayed in a bold, serif font. The main area of the window contains several input fields, each with a small "KB" button to its right. The fields are: "Customer Name:", "Street Address 1:", "Street Address 2:", "City:", "State:" (with a dropdown arrow), "Zip Code:", "Phone:" (with a dropdown arrow and a hyphen), and "Email:". At the bottom right of the window, there are two buttons: "Save" and "Cancel".

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## ASSOCIATE SALE WITH CUSTOMER ACCOUNT

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Each time a sale is rung up the customer's card will need to be swiped. This way the system will be able to track the sales that customer has made. To do this you will want to do the following:

- 1) Go to **Touch Screen POS>POS Sales** and cashier in.
- 2) Ring in the sale as you normally would.
- 3) Click Customer Loyalty.
- 4) Swipe the customer's card and select OK.
- 5) You should see the Customer Loyalty button turn red, indicating it is tracking loyalty.
- 6) Cash out the sale.

## REDEEM LOYALTY

Redeeming loyalty credits will vary slightly depending on what loyalty program you are using. However the process is very similar.

- 1) Go to **Touch Screen POS>POS Sales** and cashier in.
- 2) Ring in the sale as you normally would.
- 3) Click Customer Loyalty.
- 4) Swipe the customer's card.
  - a. If you are using the Percent Discount program, simply select OK and the order will be discounted by the qualifying percentage.
  - b. If you are using the Loyalty Credit program, it will show you the amount of credits available. If the customer chooses to redeem the credits, simply select Redeem Credits. This will add a Loyalty Credits product to the ticket with a negative dollar amount.
  - c. If you are using the Punch Card program, the system will show the number of punches the customer has. The first number in the punches column is the number of punches and the second number is the number of punches required for a free item.

ENTER CUSTOMER ACCOUNT #

**ENTER CUSTOMER ACCOUNT #**

Account #:

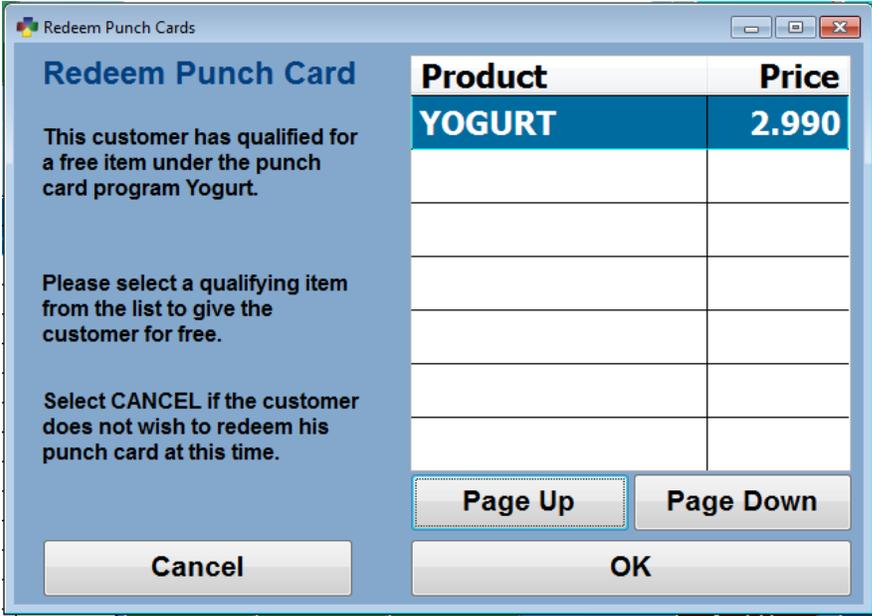
Loyalty discounts and credits are disabled.

Punch Cards:

Program ID	Punches
Yogurt	10 / 10

Select **Redeem Punch Card**.

This will bring up a list of qualifying products that have been added to the ticket. Select the item you would like to comp and select OK.



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## REPORTING

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If you are using the Loyalty Credits program, the system does have a report that is available for you to be able to see the number of credits that customers have available as well as how much they have spent. You can view this report by going to **Touch Screen POS>POS Manager Functions>POS Reports>Loyalty Credits**. This report will show you total sales, credits earned, credits used, and remaining credits.