

MULTI-SITE

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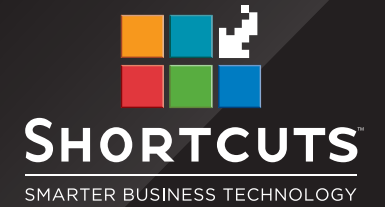
BARBER

CLINIC

# LOYALTY SETTING UP A LOYALTY PROGRAM

HOME &  
MOBILE

BEAUTY



*it suits you*

**Last updated 12 October 2018**

By Erin Lewis

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## ABOUT THIS DOCUMENT

This document is designed to give you the tools you need to use Loyalty to its full potential.

Loyalty is a great way to reward your valued clients and create long term customer relationships, providing flexible options to keep them coming back for more. Automated, sophisticated and sleek, the feature uses a points-based system that allows you to reward your clients based on the amount they spend on products and services.

This document will guide you through all the necessary steps in getting your Loyalty program up and running.

# SETTING UP A LOYALTY PROGRAM

## ADDING A LOYALTY PROGRAM

- 1 Log into the Console (https://console.shortcutssoftware.com). Then click on the **programs** tile.
- 2 Click **administration**.
- 3 Click **program**.
- 4 Select your community from the drop-down menu.
- A You can edit an existing program by selecting it from the drop-down menu.
- 5 Click **add program**.

The screenshot displays the 'Program Management' interface in the Shortcuts Software console. The page title is 'Program Management' and the user is identified as 'User: ann.lewis@shortcuts.com.au'. The left sidebar contains a navigation menu with items: Administration, Program, Management, Reports, Number Registrations, and LogOff. The main content area is titled 'Edit Programs' and features two sections: 'Choose Community' and 'Choose Program'. The 'Choose Community' section has a dropdown menu currently showing 'Peppermint Park'. The 'Choose Program' section has a dropdown menu currently showing '[Select One]'. Below the 'Choose Program' section is a blue button labeled 'Add Program'. Numbered callouts (1-5) and a letter callout (A) are overlaid on the screenshot to indicate the steps for adding a program.

6

Choose **loyalty**.

7

Enter the program name.

8

Enter a unique program code. It is recommended that you include your business name in the program code to ensure it is unique.

9

**Optional:** Enter a description.

10

Choose your preferred number generation method. This determines how you will allocate member numbers. If you are not allocating loyalty cards, you may wish to select automatic number generation. If you are allocating cards, you may wish to use only pre-registered numbers, or you can allow both methods.

11

Choose whether you want to allow customers to join this loyalty program via the Mobile Guest App.

12

**Optional:** Enter an expiry for the program.

The screenshot displays the 'Edit Programs' interface in the SHORTCUTS system. The page title is 'Program Management' and the user is identified as 'User: enn.lewis@shortcuts.com.au'. The left sidebar shows navigation options: Administration, Program, Management, Reports, Number Registrations, and LogOff. The main content area is titled 'Edit Programs' and contains the following sections:

- Program Details:**
  - Type: Radio buttons for Gift Card (6), Loyalty (7), and Membership.
  - Identification Code: Text input field with 'SCL' entered.
  - Name: Text input field with 'VIP Loyalty Program' entered (7).
  - Program Code: Text input field with 'peppermintparkVIP' entered (8). A note states: 'The program code must be unique throughout the whole system, and once set cannot be changed.'
  - Description: Text input field (9).
  - Number Generation: Radio buttons for 'Allow automatic number generation and pre-registered numbers' (10), 'Restrict to automatic number generation', and 'Restrict to pre-registered numbers'.
  - Allow program signups in the app: Radio buttons for Yes (11) and No. A note states: 'Choose whether to allow customers to sign up for this program through the loyalty site in the app. Only one program can be selected for app signups. Joining fees will not be charged for app signups.' Below this, it says 'VIP Loyalty Program program currently selected.'
  - Currency: Text input field with 'AUD' entered.
- Loyalty Setup:**
  - Expiry (months): Text input field (12).
  - Points Accrual Script: Dropdown menu with 'Earn 1 point for \$10 spent on full price Services (inc tax)' selected. A note below reads: 'Awards 1 point per \$10 spent on full price Services (including tax)'.
  - Transaction Points Expiry (months): Text input field with '6' entered.
  - Transaction Amount Expiry (months): Text input field with '6' entered.
  - Upgrade Program: Dropdown menu with '[Select One]' selected.

13

Select your desired points accrual script. This determines how members will accrue points.

14

**Optional:** Enter an expiry for accrued points.

15

**Optional:** Enter an expiry for accrued amount.

16

If applicable, select the program that a member will be upgraded to upon reaching the specified goal.

17

If applicable, select a program change script. This is the event upon which the member will be upgraded to the selected program.

18

Select a points conversion ratio. This determines the rate at which points are converted into rewards. You can select a ratio from the drop-down list, or enter a custom ratio.

19

**Optional:** Enter a grace period. This is the number of days after their program expires that the member can still redeem rewards.

The screenshot shows the 'Loyalty Setup' form with the following fields and callouts:

- 13:** Points Accrual Script: Earn 1 point for \$10 spent on full price Services (inc tax)
- 14:** Transaction Points Expiry (months): 6
- 15:** Transaction Amount Expiry (months): 6
- 16:** Upgrade Program: [Select One]
- 17:** Program Change Script: [Select One]
- 18:** Points Conversion Ratio: Convert 10 points to \$10
- 19:** Grace period (days): [Empty]

Other fields include: Expiry (months), Cancellation period (hours) set to 24, One-time redemption (Allow only single redemption), Forfeit remaining balance (Give remaining balance as change when below minimum balance), and Balance, Activation, Reload, and Redemption ranges (all set to 0.00 - 1000.00).

20

Enter the cancellation period. This is the number of hours after joining that the member is allowed to cancel their loyalty.

21

Tick 'allow only single redemption' if you only want to allow one reward redemption before a member's balance is returned to zero (forfeiting unused rewards).

22

The 'forfeit remaining balance' option is only relevant if your minimum 'balance range' is above zero. If you choose 'forfeit remaining balance' then the member's remaining balance will be forfeited when their balance falls below the minimum. If you choose 'give remaining balance as change' then their remaining balance will be given as change.

23

Enter the balance range. This defines the minimum and maximum reward value a loyalty member can have.

**Loyalty Setup**

Expiry (months):

Points Accrual Script:   
Awards 1 point per \$10 spent on full price Services (including tax).

Transaction Points Expiry (months):

Transaction Amount Expiry (months):

Upgrade Program:

Program Change Script:

Points Conversion Ratio:  Convert 10 points to \$10  
Awards \$10 once 10 points are accrued.  
 Convert  points to \$

Grace period (days):

Cancellation period (hours):  **20**

One-time redemption:  Allow only single redemption **21**

Forfeit remaining balance:  Forfeit remaining balance when below minimum balance **22**  
 Give remaining balance as change when below minimum balance

Balance range: Redemptions falling below the minimum balance will be fully redeemed.  -  **23**

Activation range:  -

Reload range:  -

Redemption range:  -

**24** Enter the activation range. This defines the minimum and maximum value that a member's newly activated loyalty number can have.

**25** Enter the reload range. The defines the minimum and maximum value that can be 'topped up'.

**26** Enter the redemption range. This defines the minimum and maximum value that can be redeemed in a single transaction.

**27** Click **save**.

**Loyalty Setup**

Expiry (months):

Points Accrual Script:   
Awards 1 point per \$10 spent on full price Services (including tax).

Transaction Points Expiry (months):

Transaction Amount Expiry (months):

Upgrade Program:

Program Change Script:

Points Conversion Ratio:  
 Convert 10 points to \$10  
Awards \$10 once 10 points are accrued.  
 Convert  points to \$

Grace period (days):

Cancellation period (hours):

One-time redemption:  
Allow only one redemption for a card and forfeit any remaining balance.  Allow only single redemption

Forfeit remaining balance:  
When redeeming below minimum balance, remaining balance will be forfeited as opposed to refunded as change.  Forfeit remaining balance when below minimum balance  
 Give remaining balance as change when below minimum balance

Balance range:  
Redemptions falling below the minimum balance will be fully redeemed.  -

Activation range:  -  -  -



# SETTING UP LOYALTY IN FUSION

## SETTING UP LOYALTY ACTIVATION SUNDRY ITEM

Before you can start using your new loyalty program, you must first set up the relevant sundry items. The 'loyalty activation' is the item that you will process at the Point of Sale when adding a client to a loyalty program.

- Click on the **setup** menu.
- Click on the **configuration** icon.
- Click on the **sales** setup menu.
- Click on the **sundry income** icon.
- Click **new**.
- Enter the name of the item.
- Click **done**.
- Select **program activation** as the sundry type.
- Select the program that this item belongs to.
- Enter a joining fee if applicable.
- Click **save**.

The screenshot displays the 'Sundry Income Setup' interface. The main area shows the configuration for a 'VIP Loyalty Activation' item. The 'Sundry Type' is set to 'Program Activation' and the 'Program' is 'VIP Loyalty Program'. The 'Amount' is set to 10. The 'Tax Rate' is 'GST Sundry Tax' and the 'Barcode' is '0006T'. The 'Active' checkbox is checked. The 'Sundry Income Name' dialog box is open, showing the 'Sundry Name' as 'VIP Loyalty Activation'. The 'Done' button is highlighted with a green checkmark. The left sidebar shows the 'Sales' menu with the 'Sundry Income' icon selected. The right sidebar shows the 'Setup' menu with the 'Configuration' icon selected. The user profile 'Anna Owsler' is visible at the bottom right.

## SETTING UP A PROGRAM CHANGE SUNDRY ITEM

If you have configured your loyalty program to allow upgrades, you will need to set up a 'program change' sundry item. The 'program change' is the item that you will process at the Point of Sale if you wish to manually upgrade a member's loyalty program.

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **sales** setup menu.
- 4 Click on the **sundry income** icon.
- 5 Click **new**.
- 6 Enter the name of the item.
- 7 Click **done**.
- 8 Select **program change** as the sundry type.
- 9 Select the program that this item belongs to.
- 10 **Optional:** If you wish to charge an upgrade fee, enter the amount.
- 11 Click **save**.

The screenshot displays the 'Sundry Income Setup' interface. The main form contains the following fields and values:

- Sundry Income:** Loyalty Program Change
- Description:** (Empty)
- Amount:** 10
- Sundry Type:** Program Change
- Program:** VIP Loyalty Program
- Barcode:** 00075
- External Id:** (Empty)

The 'Sundry Income Name' dialog box shows the 'Sundry Name' field with the value 'Loyalty Program Change' entered. The 'Done' button is highlighted with a green checkmark.

## SETTING UP YOUR LOYALTY PAYMENT TYPE

You will need to activate the loyalty payment type for use with loyalty programs.

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **sales** setup menu.
- 4 Click on the **payment types** icon.
- 5 Check the 'display inactive' box.
- 6 Select **loyalty** from the drop-down menu.
- 7 Ensure that the 'active' and 'gift card/loyalty card' boxes are checked.
- 8 Select **shortcuts gift card** from the drop-down menu.
- 9 Click **save**.

The screenshot displays the 'Payment Types Setup' interface. The 'Payment Name' dropdown is set to 'Loyalty'. The 'Display Inactive' checkbox is checked. The 'Processor Setting' dropdown is set to 'Shortcuts Gift Card'. The 'Card Identification' field contains 'SCL'. The 'Active' checkbox is checked, and the 'Gift Card/Loyalty Card' checkbox is also checked. The 'Description' field contains 'A member card used for redeeming discounts or free benefits'. The 'Club' dropdown is set to '< Payment not for a Club >'. The 'Processor' dropdown is set to 'Shortcuts Gift Card'. At the bottom, there are 'New', 'Edit', and 'Save' buttons, and a 'Done' button with a green checkmark. The left sidebar shows navigation options like Sales, Discounts, Receipt, Sundry Income, Expenses, Gift Certificates, Terminals, and Payment Processor. The right sidebar shows shortcuts for Main, Tools, Stock, Setup, Configuration, Employees, Employee Groups, Capabilities, Services, Series, and Contraindications. The top right corner shows the time and date: 10:34 AM Thu, 31 Mar '16. The bottom right corner shows the user name 'Anna Owsier' and a 'Log Off' button.

## CONFIGURING SECURITY FOR LOYALTY

You can specify which security levels have access to assign a member an alternate loyalty card, and update client points in your security settings. These security settings only affect Shortcuts Fusion, so any employees that have access to the Program Manager will still be able to make changes to a client's loyalty program.

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **general** setup menu.
- 4 Click on the **security** icon.
- 5 Click on the **access** tab.
- 6 Click to select the security level you wish to edit.
- 7 Double click to expand the 'Point of Sale' category.
- 8 Tick 'assign alternate loyalty card' to give this security level access to this action.

The screenshot shows the 'Security Setup' window in Shortcuts Fusion. The interface includes a left sidebar with navigation icons, a top header, and a main content area. The 'Access' tab is selected, showing a table of security levels and their permissions. The 'Point of Sale' category is expanded, and the 'Assign alternate loyalty card' option is checked.

| Levels/Terminals | Item/Action                              | Access                              | Type   |
|------------------|--|-------------------------------------|--------|
| Security Levels  | Point Of Sale                            | <input checked="" type="checkbox"/> | Action |
| Owner            | Allow Line Discount - Products           | <input checked="" type="checkbox"/> | Action |
| Manager          | Allow Line Discount - Services           | <input checked="" type="checkbox"/> | Action |
| Employee         | Allow Line Discount - Sundry             | <input checked="" type="checkbox"/> | Action |
| 2IC              | Allow Refund Of Account Payment          | <input checked="" type="checkbox"/> | Action |
| Terminals        | Allow Sale Discount                      | <input checked="" type="checkbox"/> | Action |
| AUSNB067         | Assign alternate loyalty card            | <input checked="" type="checkbox"/> | Action |
|                  | Can be selected at POS                   | <input checked="" type="checkbox"/> | Action |
|                  | Change Employee for Complete Transaction | <input checked="" type="checkbox"/> | Action |
|                  | Change Price at POS - Products           | <input checked="" type="checkbox"/> | Action |
|                  | Change Price at POS - Sundry             | <input checked="" type="checkbox"/> | Action |
|                  | Change Price at Service selection        | <input checked="" type="checkbox"/> | Action |
|                  | Change Transaction List Date             | <input checked="" type="checkbox"/> | Action |
|                  | Change Transaction Payment Type          | <input checked="" type="checkbox"/> | Action |
|                  | Credit Card Batch Release                | <input type="checkbox"/>            | Action |

Additional security settings shown at the bottom:

- Double PIN Verification to delete Transactions
- Require Return or Done when entering PIN's
- Security Enabled
- Support Verification Devices

The interface also features a 'Password' field, a 'Done' button, and a user profile section on the right showing 'Anna Owner' and a 'Log Off' option.

9

Double click to expand the clients category.

10

Tick 'update client points' to give this security level access to this action.

11

Click **done**.

**Security Setup**

| Levels/Terminals | Item/Action               | Access                              | Type   |
|------------------|---------------------------|-------------------------------------|--------|
| Security Levels  | Clients                   | <input checked="" type="checkbox"/> | Action |
| • Owner          | View Custom Client Card   | <input checked="" type="checkbox"/> | Screen |
| • Manager        | Update Client Points      | <input checked="" type="checkbox"/> | Action |
| • Employee       | Treatment                 | <input checked="" type="checkbox"/> | Screen |
| • 2IC            | Suspend Membership        | <input checked="" type="checkbox"/> | Action |
| Terminals        | Resubscribe Membership    | <input checked="" type="checkbox"/> | Action |
| • AUSNB067       | Refund Membership         | <input checked="" type="checkbox"/> | Action |
|                  | Print CPC                 | <input checked="" type="checkbox"/> | Action |
|                  | Edit Custom Client Card   | <input checked="" type="checkbox"/> | Screen |
|                  | Edit Client Photo History | <input checked="" type="checkbox"/> | Action |
|                  | Delete Client             | <input type="checkbox"/>            | Action |
|                  | Custom Client Field Setup | <input checked="" type="checkbox"/> | Screen |
|                  | Credit Membership         | <input checked="" type="checkbox"/> | Action |
|                  | Client Photo History      | <input checked="" type="checkbox"/> | Screen |
|                  | Client Merge              | <input checked="" type="checkbox"/> | Screen |

**Password**

- Double PIN Verification to delete Transactions
- Require Return or Done when entering PIN's
- Security Enabled
- Support Verification Devices

**Done**

# SETTING UP LOYALTY IN THE APP

## ADDING YOUR LOYALTY PROGRAM INTO THE APP

Adding the loyalty tile into your Mobile Guest App will allow guests to sign up for your loyalty program, and view their points and rewards balance. Please note: The following section only contains setup steps that specifically relate to Loyalty in the App. This is not a full setup guide for the Mobile Guest App.

- 1 Log into the Console (<https://console.shortcutssoftware.com>). Then click on the **MySalonApp** tile.
- 2 Click on **tiles**.
- 3 Select **loyalty** from the default tiles list.
- 4 **Optional:** Use the **label** field to customise the name of the loyalty tile. Your clients will see this in the app.
- 5 Select the loyalty program that you want clients to be able to join via the app. If you only have one loyalty program, it will be selected by default.
- 6 **Optional:** Use the **display name** field to customise the name of the loyalty program. This is the program name that your clients will see in the app.
- 7 **Optional:** Use the **program description** field to enter a description of the program. Your clients will see this in the app.

**MySalonApp for Community:Peppermint Park**

Start > MySalonApp Settings

General Settings

Activate app for customer download

App Business Code: peppermintparksalon

Check Availability

Erin Jones | Log Out

Selected community: Peppermint Park

Save

Dashboard

Tiles

Theming

Home

**Tile Configuration:Peppermint Park**

Start > MySalonApp Settings > Tiles

**Tiles**

Default Tiles

- About
- My profile
- Book now
- Meet the team
- Specials
- Services
- Facebook
- Check-in
- Visit History
- Loyalty

Custom Tiles

+ New Tile

**Details**

This allows clients to join a Loyalty program, access their digital Loyalty card, and view their points and rewards balance.

Language: English - Australia

Label: Loyalty

Loyalty program: VIP Loyalty Program

Customers will be able to join this program through the app. Joining fees will not be charged for app signups.

VIP Loyalty Program display name: VIP Loyalty Program

Program description: With the VIP loyalty program, you will earn 1 point for every \$10 spent on services. When you reach 10 points, this will be converted into \$10 worth of rewards.

Platinum Loyalty Program display name: Platinum Loyalty Program

Program description:

Display Image: [Image of a woman holding a loyalty card]

Remove Image

Choose File | No file chosen

A

If you have a tiered loyalty program (e.g. silver, gold, platinum), the upper tiers in your loyalty program will also have **display name** and **program description** fields available for you to customise.

8

**Optional:** Customise the **display image** for the tile. Your clients will see this in the app.

9

Once you have finished editing, press **save**.

10

Click on **dashboard**.

**Tile Configuration:Peppermint Park**

Start > MySalonApp Settings > Tiles

**Tiles**

**Default Tiles**

- About
- My profile
- Book now
- Meet the team
- Specials
- Services
- Facebook
- Check-in
- Visit History
- Loyalty

**Custom Tiles**

+ New Tile

**Details**

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Platinum Loyalty Program display name: Platinum Loyalty Program

Program description:

Display Image:  Remove Image

Choose File: No file chosen

Erin Jones Log Out

Selected community: Peppermint Park

Save

MySalonApp Settings

Dashboard

Theming

Home

SHORTCUTS S.M.A.P.T. SYSTEM

11

Click and drag the loyalty tile to the desired position within the app dashboard layout.

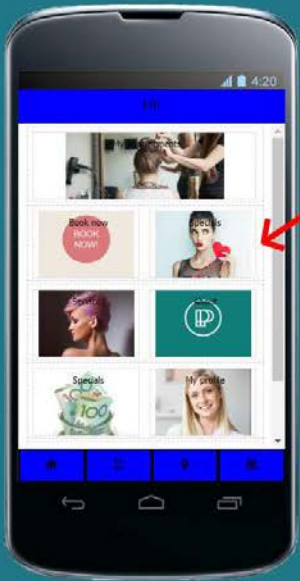
12

Once the loyalty tile is in place, click **save**.

### Dashboard Configuration:Peppermint Park

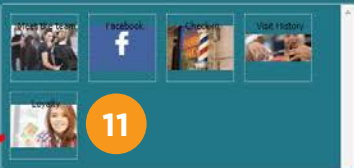
Start > MySalonApp Settings > Dashboard

#### Dashboard Layout





#### Options

Inactive Tiles



Tile Description

Clients can view their profiles here

Erin Jones  Log Out 

Selected community:  
Peppermint Park


Save **12**

MySalonApp Settings >

Tiles >

Theming >

Home >







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