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# Integrated Loyalty Guide

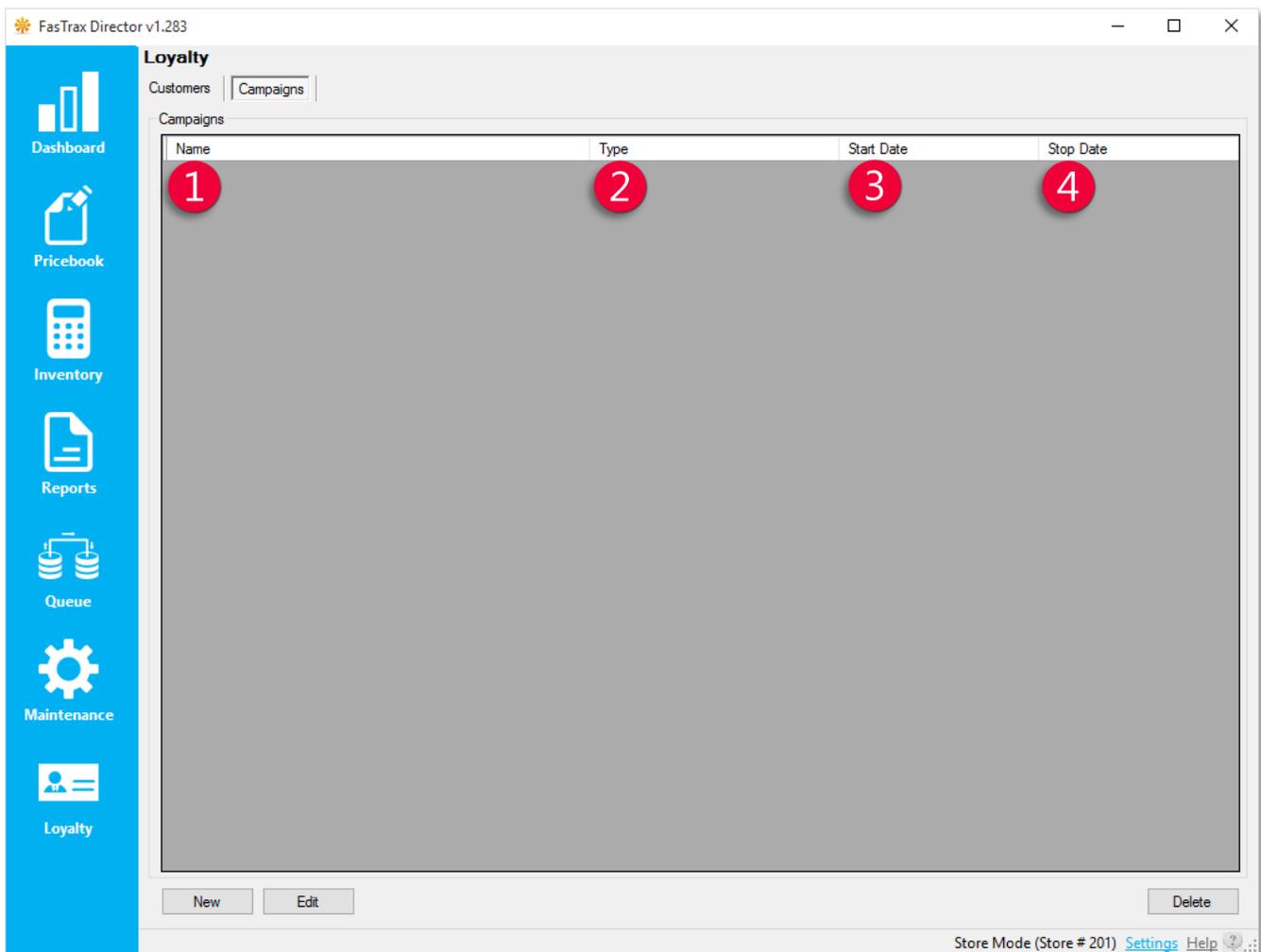
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# Overview of Loyalty Campaigns

**Loyalty Campaigns** provide a method of rewarding customers for repeat business by giving discounts in the form of store coupons that can be redeemed on subsequent visits; the coupons can be printed for all customers or only for loyalty customers.

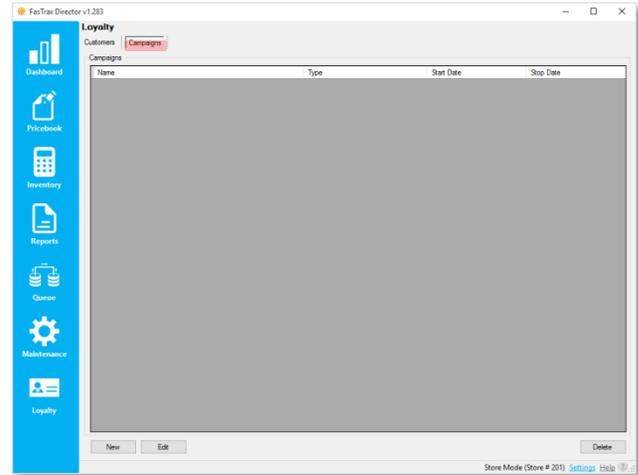
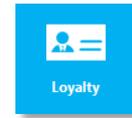
Once a customer is signed up for a **Loyalty Account**, Their sales are tracked, and coupons are printed after their purchases. These coupons can be set to be redeemed at the store that printed the coupon, or at every store, depending on relevant company policies.



- 1 Name – the name of the Loyalty Campaign
- 2 Type – tells what the Campaign gives to the customer
  - o Currently, **Postsale Coupon** is the only type of campaign.
- 3 Start Date – the beginning of the campaign
- 4 Stop Date – the end of the campaign
  - o Note that this is different from the **Expire Date** of the coupon and has no effect on coupons after they are printed.

# Creating a Loyalty Campaign (Director)

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



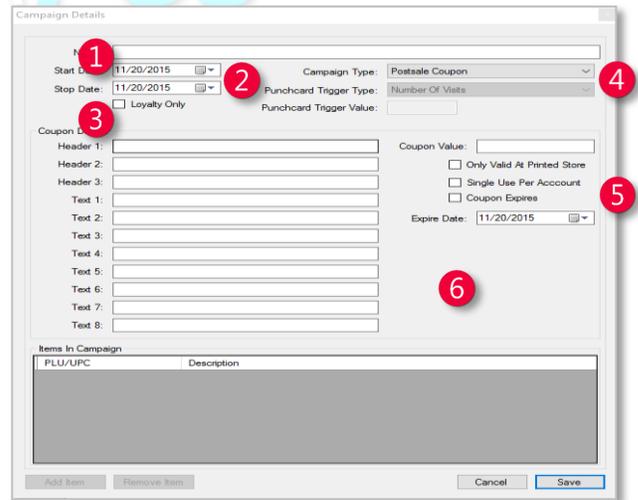
3. Choose the **New** button.

If you are editing an existing **Loyalty Campaign**, simply highlight the applicable line and choose the **Edit** button instead.



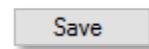
4. In the **Campaign Details** section, enter the parameters you wish for this discount to follow.

Campaign Types include:  
**Post sale coupon:** Prints a coupon after the sale of qualifying items to provide a discount on the next visit.  
**PM/UST/RJR Points Rewards:** When a loyalty customer has bought enough qualifying items, they get a discount on that transaction. Points are tracked for each type separately.



- 1 Name – name of the **Campaign** for your reference.
- 2 **Start/Stop Date** – specifies when the campaign begins and ends.
- 3 **Loyalty Only** – specifies that this campaign will only take effect when sale is made to a **Loyalty Customer**.
- 4 **Campaign Type** – the chosen style of Loyalty Campaign.
- 5 **Coupon Value** – depending on the campaign type, this is the dollar amount removed when coupon is applied.
- 6 **Expire Date** - This is the expiration date of the printed coupons; this is independent of the Stop Date entered above.

5. Choose **Save** when complete.





# Adding Items to a Loyalty Campaign

1. After logging into Director, choose the Pricebook module.
2. Choose Mass Updates from the menu ribbon.



The screenshot shows the FacTrax Director v1.356 Pricebook interface. On the left is a navigation sidebar with icons for Dashboard, Pricebook, Inventory, Reports, Queue, Maintenance, and Loyalty. The main area displays a table of 7474 items in a filter. The table has columns for UPC Number, Description, Dept, Cost, Price, Margin, Vendor Part, Part Cost, CTN, Major Category, Category, and Manufacturer. Below the table is a ribbon with tabs: Standard Prices, Cost Updates, Field Updates, Utilities (highlighted with a red circle 1), Add Utilities, Store Updating, Support Utilities, Zone Utilities - Price, Zone Utilities - Cost, Zone Utilities - Cigars, Compare Zones, and Avg Cost. Under the Utilities tab, there are several dropdown menus and buttons: 'Add To Buydown', 'Add Vendor Parts To' (set to '2 - Arango Cigar Co.'), 'Add To Discount' (set to 'SNUFF ROLL'), and 'Add To Campaign' (set to 'CDO 4 PACKS' with a red circle 2). There are also input fields for 'Value' (set to 1) and 'Pts' (set to 1, with a red circle 3). A red circle 4 is placed over the 'Add To Campaign' button.

3. Filter to the items you want to include in the Campaign
4. Add the Items to the campaign.

- 1 Select the Utilities tab
- 2 Choose your campaign from the Add to Campaign dropdown
- 3 Choose a Pts value for the items being added (Ex. 1 point for a pack of cigarettes, 10 pts for a carton).
- 4 Click Add to Campaign to assign all items in the filter to the selected campaign.

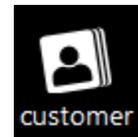


## Adding Loyalty Customers via the POS

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



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



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



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

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

management | CUSTOMER DETAILS 

first name:	<input type="text"/>	last name:	<input type="text"/>
phone #:	<input type="text"/>	<input checked="" type="checkbox"/>	ok to text
email:	<input type="text"/>	<input checked="" type="checkbox"/>	ok to email
address:	<input type="text"/>		
city:	<input type="text"/>		
state:	<input type="text"/>	zip:	<input type="text"/>
DOB:	<input type="text" value="12/ 2/2015"/>	license #:	<input type="text"/>
scannable ID:	<input type="text"/>		
notes:	<input type="text"/>		

For assistance with configurations, please contact Technical Support at [Support@FasTraxPOS.com](mailto:Support@FasTraxPOS.com)