**Support Manual**

**iLabPOS – Loyalty Points Scheme**

# Version 1.0
**November, 2020**

# 1.    Setup

iLabPOS supports a loyalty points scheme where customers can earn points on their purchases. Points are normally earned at 1 Point for every 1 EUR spent. You can also exclude certain items from the scheme, such as Tobacco in case you sell it. Furthermore, you can also assign specific points per product, however this option is rarely used as it is too cumbersome to manage.

To switch on the Loyalty Points System, first start by activating it from "File" >> "Preferences"
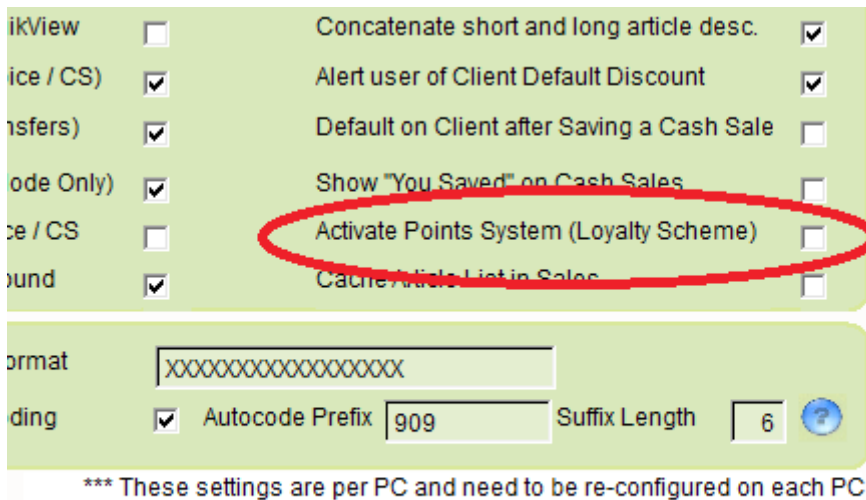


The next step is to introduce the products in the Loyalty Scheme. This can be done either individually, product per product, or else in bulk.

To introduce a product in the loyalty scheme individually, when editing (or creating a product), choose the type of points earned you wish for that product. Either choose "1 EUR = 1 Point" or else choose "X Points for each sold" in which case you need to specify how many points the customer will earn for that product.
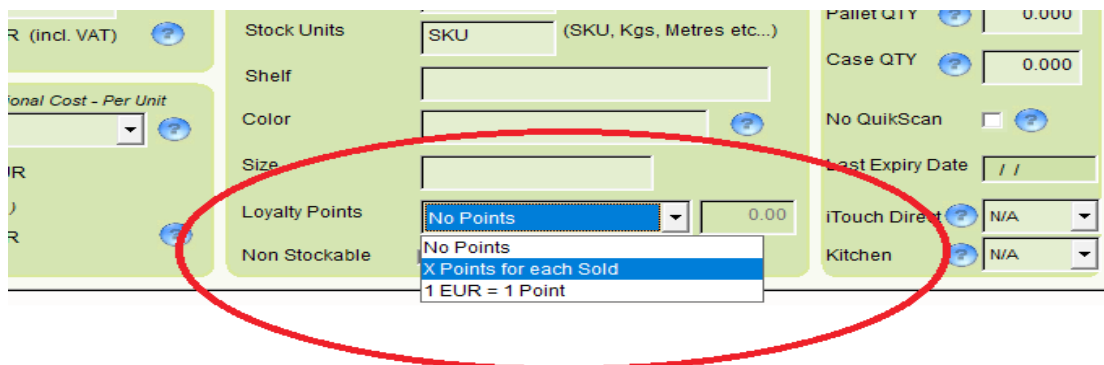
To introduce products to the loyalty scheme in bulk, go to "Tools" >> "Bulk Points Assignment".



Here simply choose which products you are going to introduce, choose the Points System, and click on Assign.

In the example above you will automatically set all products in the "Cereals" category to "1 EUR – Point". You could also, for example, set all products where the VAT is 18% in bulk, or else all products from a specific brand or purchased from a specific supplier. You can also combine the filter, such as all products from a certain brand purchase from a specific supplier. You can also set all products found in the system by just assigning without any filters at all.

*Important: Do not forget to assign new products which you create in the scheme!*

# 2.    Cash Sales and Points Accumulation

iLabPOS will automatically calculate the points earned for each customer's purchase. First of all it is important to create an account for each client you wish to give points. A Cash Sale recorded on the Cash Sale Client will not accumulate any points.

When in the iTouch screen (or cash sale screen), either click on "New Client" to create a new customer's account, or else find the client from your existing database of clients if this is a returning customer.
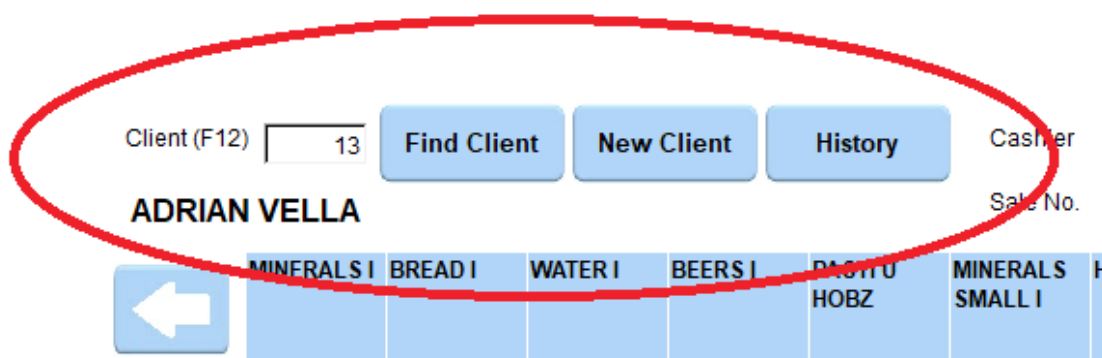


Then carry on with a normal cash sale. Once the chit is printed, the chit will show how many points were earned with this cash sale, and the total amount of points currently held. As explained earlier, iLabPOS will automatically calculate the points earned from all the products in the cash sale, and would exclude counting points for products not in the scheme.



In the example above you will see that the customer earned 23 points with this cash sale, and has a total of 33 points on account since he had already 10 points before.

*Note that points are always rounded down to the nearest whole number.*

You can also check how many points a customer has on account by clicking on the History Icon after choosing the client.

# 3.    Adjusting Points Manually and Reports

You can manually adjust a customer's points account if you have Administrator Access to do so. This can be done from "Tools" >> "Points Adjustment".
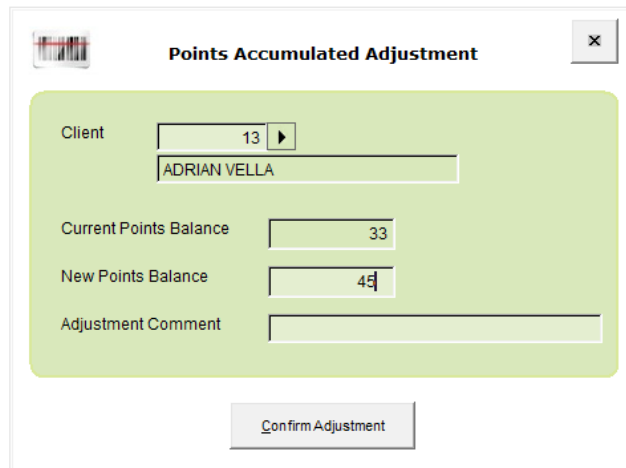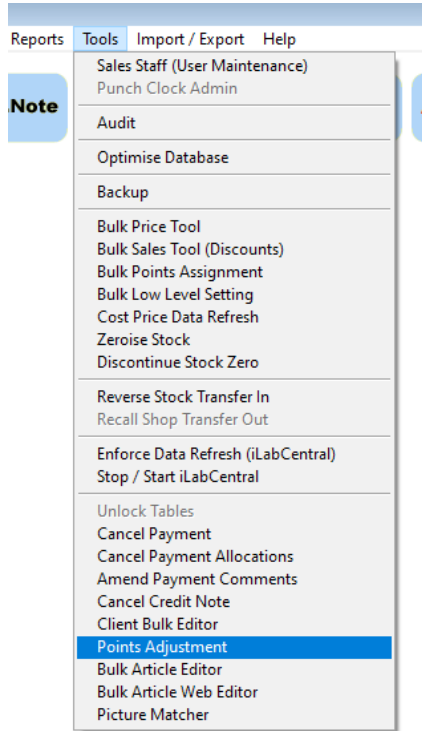


Under "Reports" you will also find 2 reports to list points accumulated and points redeemed per client or per date range.

# 4.   Redeeming Points

Points accumulated can be exchanged either for a discount, or else for another product. The choice of what you will offer is of course up to you, the system supports both options.



After preparing the cash sale and choosing the client, click on "Redeem Points". Here you can choose whether the client is redeeming points for a product or for a discount.

The configuration of vouchers (100 Points – 5 EUR, 200 Points – 10 EUR etc…) can be customised to your needs by asking us in advance.

Furthermore, to redeem against a product you will need to specify that a particular product is actually redeemable, and for how many points. This can be done from the "Articles" screen after pressing "Points and Offers".