

VitalLink Internal Loyalty Program Setup

INI Settings

Change profits.ini on all workstations to set Loyalty = 1.

```
[Loyalty]
Loyalty=0
;0 = none, 1 = Profits, 2 = Mercury, 3 = Accelitec
```

Key Concepts in Loyalty Setup

Terms:

Points - The unit of measure used to determine a customer's accrued bonus value. Points can be earned when a customer purchases products at your site.

Points may be earned by:

- Buying Items from one or more specific Menu Groups toward awards

- Measuring total dollars spent (pre or after tax) toward one or more awards

Note that points are earned by purchasing items within a GROUP. Point values can differ by SIZE within a group, but not from one specialty to another in the same group.

Award Bank – There are 10 holding banks per customer where award **points** are stored. These can be used to generate different awards at different times.

Examples:

- Bank 0 issues an award for every 10 drinks ordered

- Bank 1 issues an award for every 5 pizzas ordered

- Bank 3 issues an award for every \$500 spent

Banks are NOT mutually exclusive

Award Threshold – The number of points a customer must accrue to generate a specific award

Award – This is a print out that occurs, typically on your receipt printer, when a customer reaches any of the award thresholds setup by the store operator. It is a printed award voucher with text defined by you, the business owner.

Loyalty Card – To earn loyalty awards, a customer must have a loyalty card.

Any of the following may be true about a loyalty card:

- A loyalty card may also be a Gift Card

- A loyalty card may be associated with a customer name and address

- If a name and address is associated, the card can be used by looking the customer up by name or phone number if the card is absent (not with Accelitec implementation)

Menu.exe (Menu Painter) Changes for Loyalty

[illegible]

Drinks

Specialty Pricing	Addon Pricing	Type Base Pricing	Addon Standard Pricing	Loyalty Points
Drinks	Spruce 1.00	Cedar 2.00	Redwoo 3.00	Giant 4.00
			Coff. to	refill

Sizes

Bank 0 ———— <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank 1 ———— <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank 2 ———— <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank 3 ———— <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank 4 ———— <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank 5 ———— <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank 6 ———— <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank 7 ———— <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank 8 ———— <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bank 9 ———— <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Award Banks

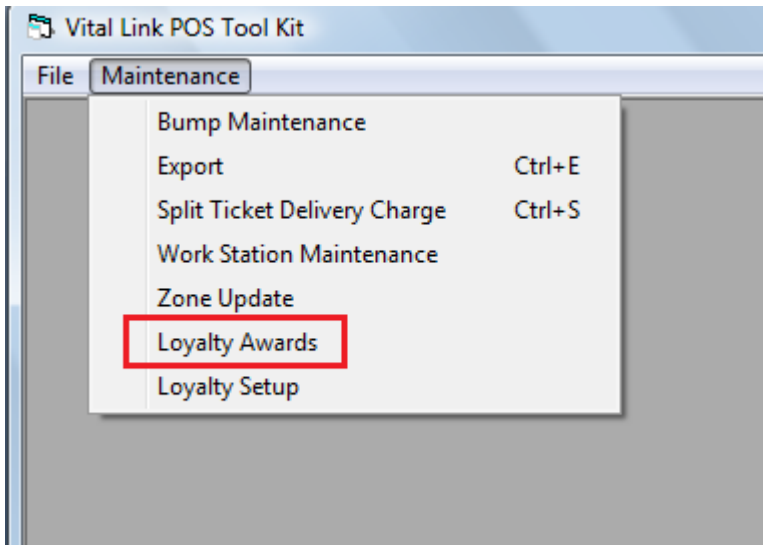
Save

- Page: 2 of: 7

3. From the **Banks** panel, select which banks THIS **Group** will update. For example:
 - a. Drinks (a group) update Bank 0 (which will later be defined as a drink award)
 - b. Blended (a group) may ALSO update Bank 0 as another type of drink
 - c. Pastries (a group) update Bank 1 a food award to be defined later
4. Use the **Save** button to record loyalty updates when complete

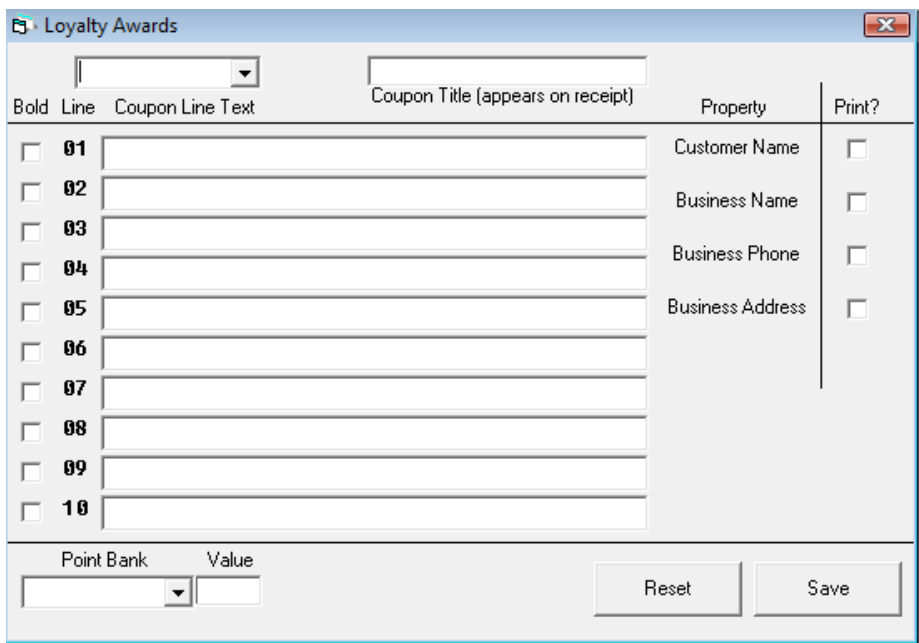
VLToolkit Changes for Loyalty

VLToolkit.exe has additional functions added to facilitate Loyalty:



Loyalty Awards

Select Work Loyalty Awards to perform setup functions related to what awards will be:



Bold	Line	Coupon Line Text	Coupon Title (appears on receipt)	Property	Print?
<input type="checkbox"/>	01			Customer Name	<input type="checkbox"/>
<input type="checkbox"/>	02			Business Name	<input type="checkbox"/>
<input type="checkbox"/>	03			Business Phone	<input type="checkbox"/>
<input type="checkbox"/>	04			Business Address	<input type="checkbox"/>
<input type="checkbox"/>	05				
<input type="checkbox"/>	06				
<input type="checkbox"/>	07				
<input type="checkbox"/>	08				
<input type="checkbox"/>	09				
<input type="checkbox"/>	10				

Point Bank: Value:

Reset Save

1. The top left box will sequentially number awards. The award number is not critical.
2. The **Coupon Title** will display on both card balance inquiries and receipt printouts to show what the possible awards are, and the customer point balance toward earning the award
3. **Coupon Lines 1-10** give you ten lines of up to 40 characters to type in what the printed award will say. This is the award voucher that will print automatically on your receipt printer when a customer earns the award, so be creative!
4. **Bold 1-10** – any line of text can be “bolded” which will cause it to print double wide (only 20 characters per line)
5. **Business Info print options** – checking these boxes will cause your business name, phone, and/or address to print on the award.
6. **Point Bank** – each award is associated with a bank, In the examples used in this document, bank 0 is a drink award.
7. **Value** – how many points must be accrued for this award to print?

Loyalty Setup

Use this function if you would like to set up awards based on dollars spent (as opposed to Menu Items ordered)

The screenshot shows a 'Loyalty Setup' dialog box with the following fields and controls:

- 1 Dollar =** [] **Points**: A text input field for defining the point value of one dollar.
- Rounding Method**: A dropdown menu for selecting the rounding method.
- Sale Type**: Radio buttons for **Gross** (selected) and **Net**.
- Point Banks To Update**: A grid of checkboxes for banks 0 through 9.

<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9
- Save Settings**: A button at the bottom of the dialog.

1. **1 Dollar =** define how many points accrue for each dollar spent
2. **Rounding method** – define how the system should round partial dollars spent. Choices are:
 - a. Round all Up
 - b. Round all Down
 - c. Round up if over 50 cents
3. **Sales Type** – are points accrued including or excluding tax?
4. **Points Banks to Update** – select which award banks will be used to measure dollar (not item) purchases

Order Type & Station flow for Loyalty

Order Type	Description	Type	Seq	Tax-able?	Table Req?	Comp on Coll	Prt on Coll	Name Req?	Cust Look	No Payee Assign?	Act?
Walk-In	Walkin	Carryout	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DriveThru	DriveThru	Drive-Thr	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Phone In	Phone-in and Pick-up	Carryout	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Carry Out	Carry Out	Carryout	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delivery	Delivery	Delivery	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Station Flow for Order Type: **Stations** **Printers** **Actual Time:** 0 **Default Time:**

Station	Seq	Auto Move?	New Order on update?	Expeditor?	Recipe?	Product Print?	Receipt	Print? / Printer / Copies
Order	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer: <input type="checkbox"/>	<input type="checkbox"/>
							Preparation: <input checked="" type="checkbox"/>	<input type="checkbox"/>
							Dispatch: <input type="checkbox"/>	<input type="checkbox"/>
							Dispatch Label: <input checked="" type="checkbox"/>	Label Printer
							Gift Card: <input type="checkbox"/>	<input type="checkbox"/>
							Loyalty: <input checked="" type="checkbox"/>	Printer1
OrderDue	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer: <input type="checkbox"/>	<input type="checkbox"/>
							Preparation: <input type="checkbox"/>	<input type="checkbox"/>
							Dispatch: <input type="checkbox"/>	<input type="checkbox"/>
							Dispatch Label: <input type="checkbox"/>	<input type="checkbox"/>
							Gift Card: <input checked="" type="checkbox"/>	<input type="checkbox"/>
							Loyalty: <input checked="" type="checkbox"/>	Printer1

A new print function is supported for Loyalty labeled "Loyalty". This function will automatically print an award voucher on the receipt printer IF EARNED. When to print is different by order type:

- Counter service – upon completion of transaction
- Delivery – prior to driver departure
- Table service – with presentation of the check

Note that the Gift Card print will show a cardholder their updated loyalty point balances if no award has been earned.

