



Customer Loyalty Quick Guide

***Using the Phoenix POS
Loyalty Program***

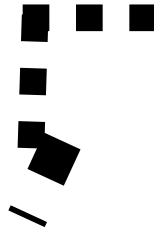
PhoenixTM
Point of Sale

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Note: This manual is applicable to Phoenix Version 6_01. Previous versions may not include all functionality mentioned; later versions may have additional functionality. Please see the Help / Release Notes for information specific to your version.

Loyalty Overview



A customer loyalty program, where customers earn points for purchases at your restaurant, is a popular way to reward frequent diners and obtain greater customer data.

The Phoenix POS system includes the ability to easily set up and use a customer loyalty program. This allows you to:

- ◆ Enroll individual customers in the program
- ◆ Auto enroll all customers
- ◆ Use a magnetic swipe card or look up customers by phone #, name, address or a variety of fields
- ◆ Establish a ratio of points earned for each dollar spent
- ◆ Set bonus points or a greater % of points earned by day of week, time of day
- ◆ Set bonus points / % bonus for, online orders, first order after enrollment, or first online order after enrollment
- ◆ Set bonus points / % bonus for specific items ordered
- ◆ Establish an expiration date for points
- ◆ Require a minimum point balance to redeem
- ◆ Require a minimum point increment for redemption
- ◆ Require swipe card for redemption or allow manual look up
- ◆ Search for customers based on point balance
- ◆ Print point balance, earned points and expiring points on customer receipts

The Phoenix system is designed as a "single store" loyalty program, as data is resident on the store's individual system and is not shared among stores. However, customers could use the same card to enroll in multiple locations, maintaining separate point totals in each store.

This document provides an overview of how to use the customer loyalty features.

Customer Enrollment

Option 1: Auto Enroll

If your program is configured for "Auto Enrollment" , all customers in your database will automatically earn points for purchases.

Option 2: Individual Enrollment

To enroll an individual customer:

1. From the POS, select Look Up to find the customer in your database.
2. If the customer is not found, press "NEW" to add the customer
3. Enter the customer information, address, etc. then press MORE

The screenshot shows the 'More Customer Info' screen in the FireFly Phoenix POS system. The screen is divided into several sections. On the left, there are buttons for 'Slices', 'Pizza', 'Salads', 'Sandwich', 'Pasta', 'Extras', 'Dessert', 'Drinks', 'Coupons', and 'Catering'. The main area contains fields for 'New Customer', 'Email', 'Driver's License #', 'Customer Group', 'Mailing List', and 'Wrong address'. There is also a 'Notes' section with a table for 'Date', 'Added By', and 'Note'. On the right, there is an 'Order History' table with columns for '#', '(\$)', and '(%)' and rows for 'Total orders', 'Delivery', 'Pick-up', 'Other', 'Last 30 days', 'Last 90 days', 'Av. order', 'Av. discount', 'Customer since', and 'Most recent order'. Below the order history, there is a section for 'Authorized Order Types' with checkboxes for 'Dine In', 'To Go', 'Table', 'Delivery', and 'Pick-up'. There is also a section for 'Authorized for checks' with a 'Balance' field and a 'Reason' field. At the bottom, there is a 'Points :0' label, a checked 'Earn Points for Purchase' checkbox, and a 'Loyalty #' field. A red circle highlights the 'Earn Points for Purchase' checkbox.

4. From the "More Customer Info" screen, in the bottom right corner, check the box that says "Earn Points for Purchase".

5. If you are using a loyalty card, put your cursor in the loyalty # field and swipe the card. The system will not let you use the same loyalty number for more than one customer.

6. If you wish to use phone # instead of a card, you can enter the phone # here for easy look up reference during the order. This is not

required as you can always look up the customer from the Look up screen.

7. Press Save and Close.

Tip: The loyalty enrollment form is a good time to capture additional customer information that can be used for marketing purposes, such as their birthday or e-mail address.

Note: You can also enroll customers in a similar way from the Manager Home / Manage Customers area

Option 3: Self Enrollment

If you wish to allow customers to enroll online from your website, with or without an online order, we have the option to support this.

Please contact FireFly as this must be coordinated with your website provider.

Earning Points

Once enrolled, your customer will earn points according to your point rules any time an order is placed and associated with this customer.

Option 1: Traditional Lookup

1. Anytime during the order process, press "Look up"
2. Search for the customer based on phone number OR
3. Press Full Search to search on loyalty card #
4. Click in the loyalty card field and swipe the card or type the number
5. Select the customer and finish the order as normal.

The screenshot shows the 'Customer Look Up' interface. At the top, there are navigation icons for HOME, Mgr. Home, Orders, Lookup, Dispatch, Options, Time Clock, Login, Key Board, and Help. The main area has input fields for Area Code, Phone #, Ext., First Name, Last Name, Street #, Street Name, Apartment #, City, State, Zip, and Map. A 'Loyalty Card' field is highlighted with a red circle. Below the input fields, there is a section for '0 Customers found that match your search criteria' with a table for results. The right side shows a 'New Ticket' summary with items like 'Small Pear & Gorgonzola Salad' and '200 Salad', along with a total of \$12.82.

Option 2: Quick Lookup

For in-house orders which will be finished quickly without traditional look up.

1. Press Finish to complete the order
2. On the tender screen, press Loyalty Card
3. Swipe the card to look up the customer
4. The customer's name will now appear at the top of the virtual ticket
5. Press 'PAY' to complete the order.

Option 3: Online Orders

Incoming online orders match existing customer records based on e-mail and/or name and phone # and automatically accredit points to their account according to your business rule setup.

If for any reason an online customer is not properly matched and a new customer record is created, you can Merge the two records (in the Manage Customers area) to combine their point totals.

The screenshot shows the tender screen with a numeric keypad and buttons for 'Cash', 'Check', 'Credit', 'Gift Certificate', 'Account', and 'user1'. A 'Loyalty Card' button is highlighted with a red circle. A red arrow points from this button to a 'Swipe loyalty card' dialog box that appears in the foreground. The dialog box has a text input field and 'Enter' and 'Cancel' buttons. The background shows the 'Open Ticket' summary with a total of \$12.82.

Tip: If you forget to associate an order with a customer, you can either "Reopen" the order, swipe the card, then re-tender the order to close it, or you can adjust the customer's point balance in Manage Customers area.

Point Redemption

Points are redeemed as a discount applied to the order. To redeem points, you must look up the customer using Customer Lookup.

1. Look up the customer
2. From the Customer Info screen, you will see the point total
3. Click on Redeem Points
4. Based on your security settings, you may be asked to swipe the loyalty card or provide a manager override.
5. The Redeem Points screen will show how many points are available and the \$ value.
6. Enter a \$ amount to use and select Apply. OR select Use All to apply the entire point balance (up to the ticket total). Select Ticket Total to discount the entire ticket (up to the available point balance).
7. The points used will appear as a discount at the bottom of the ticket.

The screenshot shows the FireFly Phoenix Point of Sale interface. The top navigation bar includes icons for HOME, Mgr. Home, Orders, Lookup, Dispatch, Options, Time Clock, Logon, Key Board, and Help. The left sidebar lists menu categories: Slices, Pizza, Calzone, Salads, Sandwich, Pasta, Extras, Dessert, Drinks, Coupons, and Catering. The main area displays the 'Customer Info' screen for 'Jamie Loyal' (949-545-1234). The 'Point Balance' is 23, and the 'Redeem Points' button is circled in red. A red arrow points from this button to the 'Customer Redeem Points' modal. The modal shows: Current Point Balance: 23, Available Point Balance: 23, Minimum Redemption Point: 10, and \$ 23.00 Credit available. It includes a text input for 'Amount to use \$' and four buttons: 'Use All', 'Ticket Total', 'Apply', and 'Cancel'.

Tip: If the "available points" are less than the "point balance" it may be because the customer has open orders, such as a delivery which has been ordered but not yet settled and closed.

Managing Points

From Manager Home / Manage Customers, you can manually adjust customer points.

1. Search for a customer
2. Select the customer and touch "Edit Details."
3. Select the "Adjust" button
4. This will display a screen which shows all transactions for that customer, including points earned, points redeemed, and adjustments.
5. Enter a positive or negative adjustment, amount and note, and save changes.

Tip: The ability to adjust points is controlled by a security setting.

Edit Customer Details

* - Required Fields

First Name: Jamie Last Name: Loyal ☒ Corporate

Customer Type: ☒ Home ☐ Business ☐ Lodging PLU # 93

Apartment #:

Phone #: 949 - 545 - 1234 x

Fax #: 503 -

Street #: 100 Street Dir: Street Name: Main

City/State/Zip/Plus_4: Foothill Ranch CA 92610 0

Carrier route:

Zone/Section/Grid:

Birthdate: [MM/DD]

Driver's License #:

Email Address:

Message:

Comment:

☒ Authorized for checks ☐ Electronic check recovery

Customer Group:

☒ Mailing List ☐ Wrong address

Account:

Credit Card: Clear

Points: 23 **Adjust**

Loyalty Card: 17514

Order History

	#	(\$)	(%)
Total orders:	6	\$ 365.78	
Delivery:	0	\$ 0.00	
Pick up:	0	\$ 0.00	
Other:	6	\$ 365.78	
Last 30 days:	6	\$ 365.78	
Last 90 days:	6	\$ 365.78	
Last year:	6	\$ 365.78	
w/coupon:	0	0.00 %	
Av. order:		\$ 60.96	
Av. discount:		\$ 0.00	
Customer since:		02/27/2009	
Most recent order:		02/27/2009	
Favorite item:		Italian Pizza	

Authorized Order Types:

☒ Dine In ☒ To Go

☒ Table ☒ Delivery

☒ Pick-up

Save & Close Close

Adjust Point -- Web Page Dialog

Adjust Point :

Date	Type	Point	Ticket #	Employee Name	Note
2009-02-27	Redeem	2	12	FIREFLY FIREFLY	
2009-02-27	Earn	1	12	FIREFLY FIREFLY	
2009-02-27	Redeem	2	11	FIREFLY FIREFLY	
2009-02-27	Earn	0	11	FIREFLY FIREFLY	
2009-02-27	Earn	4	9	FIREFLY FIREFLY	
2009-02-27	Earn	6	8	FIREFLY FIREFLY	
2009-02-27	Earn	16	7	FIREFLY FIREFLY	

Available Points : 23

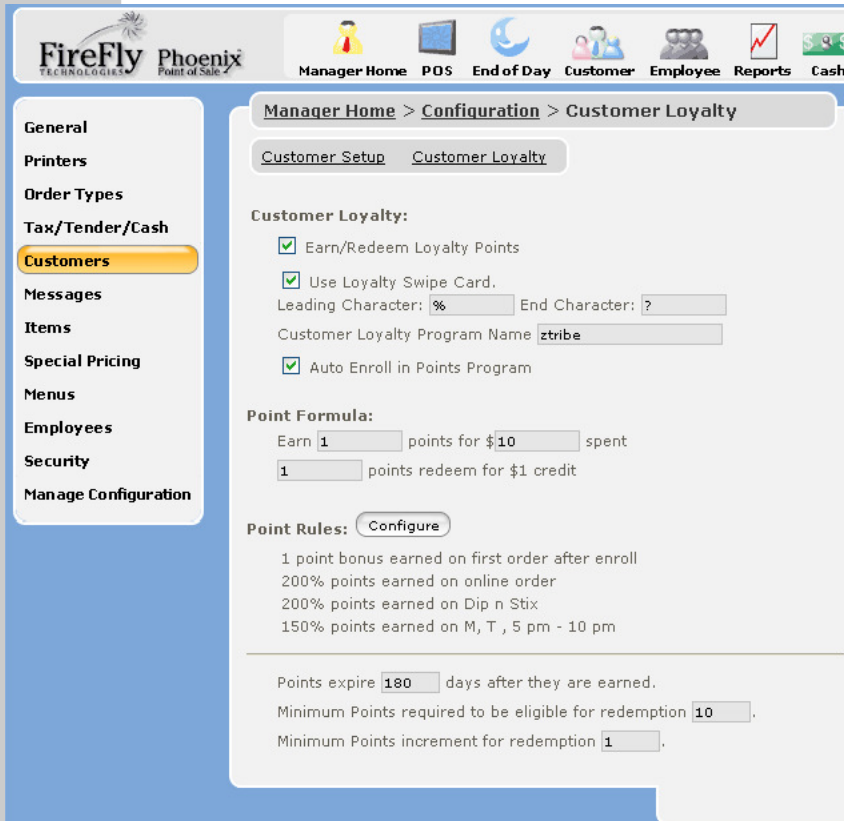
☒ Positive(+ve) Adjust ☐ Negative(-ve) Adjust

Amount:

Note:

Save Change Cancel

Customer Loyalty Configuration



FireFly Phoenix
TECHNOLOGIES POINT OF SALE

Manager Home POS End of Day Customer Employee Reports Cash

Manager Home > Configuration > Customer Loyalty

Customer Setup Customer Loyalty

Customer Loyalty:

☒ Earn/Redeem Loyalty Points

☒ Use Loyalty Swipe Card.

Leading Character: % End Character: ?

Customer Loyalty Program Name: ztribe

☒ Auto Enroll in Points Program

Point Formula:

Earn 1 points for \$10 spent

1 points redeem for \$1 credit

Point Rules: [Configure](#)

- 1 point bonus earned on first order after enroll
- 200% points earned on online order
- 200% points earned on Dip n Stix
- 150% points earned on M, T, 5 pm - 10 pm

Points expire 180 days after they are earned.

Minimum Points required to be eligible for redemption 10.

Minimum Points increment for redemption 1.

The Loyalty program is configured in the Manage Configuration / Customers area. Click on the Customer Loyalty screen.

Earn / Redeem Loyalty Points: Check this to activate the program.

Use Loyalty Swipe Card: Check this if you will be using a swipe card.

Leading / End Character: Indicate what special characters, if any, bracket your loyalty card # in the mag strip encoding of your cards. If you haven't ordered your cards yet, a standard choice is a % and a ?. If you already have cards, you can swipe a card in any text field to see what is encoded on it. All cards used in the program must be encoded the same way.

Program Name: Enter your program name, to appear on receipts.

Auto Enroll: Check this if you want all customers enrolled in the program. If it

is not checked, you can enroll customers individually.

Point Formula: Enter how many points will be earned for every \$1 spent., and how many points it takes to get \$1 credit.

Point Rules: See next page.

Point Expiration: Enter how many days you want points valid for.

Minimum points to be eligible for redemption: Enter a minimum if desired. For example, if my minimum is 10 and a customer has earned 5 points, they can not redeem any.

Minimum point increment for redemption: Enter an increment, if desired. For instance if my increment is \$1 and 1 point is worth \$.10, I can not redeem any points until I have earned at least \$1 worth.

Point Rules

Rules can be configured as a % of normal points earned, or as a straight point bonus. The rule can contain any combination of the available criteria including:

- ◆ Day of the week
- ◆ Time of day
- ◆ Online orders
- ◆ First order after enrollment
- ◆ First online order after enrollment
- ◆ Specific items, categories or departments ordered.

Select your criteria, and choose ADD.

Set up multiple rules if desired.

Press "CLOSE" to save the rules and return to the main loyalty screen.

Configure Point Rules -- Web Page Dialog

Configure Point Rules

☐ Earn % of normal points.

☐ Earn point bonus.

Valid:

Day of Week: ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun

AND Time of day: start time: am end time: am

AND ☐ Online Orders

☐ First order after enroll

☐ First online order after enroll

AND When items ordered: ITEMS

ADD

Point Rules

1 point bonus earned on first order after enroll	X
200% points earned on online order	X
200% points earned on Dip n Stix,	X
150% points earned on M, T, 5 pm - 10 pm	X

Close

Security Settings

Two security settings affect the loyalty program.

These are

- ◆ **Adjust customer points** — allows employee to manually adjust points from the Manage Customers area.
- ◆ **Redeem points without card**—allows employee to look up a customer and redeem points on an order without swiping the loyalty card.

Printed Receipt Settings

You can choose to print information about the loyalty program on your customer's receipts. To set this up, go to:

- ◆ Configuration / Printers
- ◆ Printer Ticket
- ◆ Select the ticket you use for customer receipts
- ◆ Select Header or Footer (wherever you want it to print)
- ◆ Scroll down until you see these fields which you can activate:
- ◆ **Points Earned**
- ◆ **Point Balance**
- ◆ **Expiring Points**

Check the box to make them active.

Note: Redeemed points will automatically appear as a discount on the ticket.

Manager Home > Configuration > Printer Setup

General printer setup **Printer Station** **Printer Ticket** **KPS**

Select Ticket Type: Customer Receipt **Delete**

Select Order Type: All

☐ Header ☐ Body ☒ Footer ☐ Print Logo # of line feeds at footer: 0

Field	Active	Bold	Red	Underline	Font Size	Indent	Next Line	Space Before/After	Options
Table # / Tent #	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Section/Room	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
# of People	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Order Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Promise Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Customer Comment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Custom Message	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 1	Configure
Promo Message	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 1	Configure
Reprint/Revise Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Deferred Promise Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Age Verification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Points Earned	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Point Balance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Expiring Points	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Deferred Print Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	
Deferred Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Small			0 0	

Move Up **Move Down**

Special Price Summary Report
Report is for Feb 27, 2009 - Feb 27, 2009
Report ran: Feb 27, 2009, 02:19 PM

Offer Name	Offer Count	Offer Total
Total Special Offer	9	(\$39.00)
Discount	0	(\$0.00)
Comp	6	(\$30.00)
Free Delivery	6	(\$30.00)
Coupon	0	(\$0.00)
Promo	0	(\$0.00)
Customer Point	3	(\$9.00)
customer loyalty	3	(\$9.00)

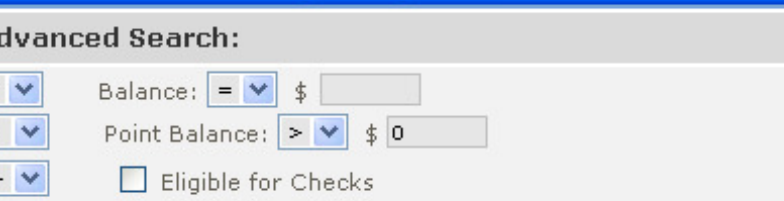
Customer Points Redeemed:

The best way to evaluate how many customer points have been redeemed and for what value is to look at the Special Price Summary and / or Detail reports. These will list a "Customer Point" category and "customer loyalty" offer which encompasses all redeemed point transactions.

Customers With Points:

The best way to find customers that have point balances is through the Advanced Search area in Manage Customers. Activate "Point Balance" by selecting AND and then select > 0 . This will display all customers with points. Although the point total is not displayed on the search result, you can see this in individual customer records, or if you choose Output List, Detailed info to csv, this export will include the point balance.

This may be useful for marketing purposes if you wish to mail merge a letter to customers telling them their point balance.



Advanced Search -- Web Page Dialog

Advanced Search:

--- Balance: = \$

And Point Balance: > \$ 0

--- ☐ Eligible for Checks

--- ☐ Wrong Address Flag Checked

--- ☐ Have e-mail address

--- ☐ Customers w/No Phone Number

--- ☐ Customers w/No Address

--- Birthday between [mm/dd] and [mm/dd]

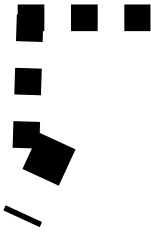
--- Belong to

Individual Customer Point Transactions:

You can review an individual customer's point transactions in Manage Customers, edit details, "Adjust" area of the point section. See page seven for details.



Getting more Help



Need help with customer loyalty?

Contact Technical support. We're here to help!

Technical Support
1-866-678-4911

Or e-mail us at

support@fireflypos.com