

## Developing a Tiered Loyalty Club program

Once you have developed a loyalty club policy, you can use the advance features to develop a tiered loyalty club program. The advance features will help you do the following:

- Move up your customers from one policy level to the next on reaching a certain threshold. For example, you can set a number of points on achieving which customers will become eligible for the next level of membership, say, from silver to gold.
- Offer **bonus** points when customers move to the next tier in the loyalty program
- Set certain occasions like New Year, Eid, Christmas, etc., as extra-points-days offering **promo points** for shopping on these days.
- Offer special awards, with personalized greetings, to customers on their special occasions like birthdays and anniversaries.

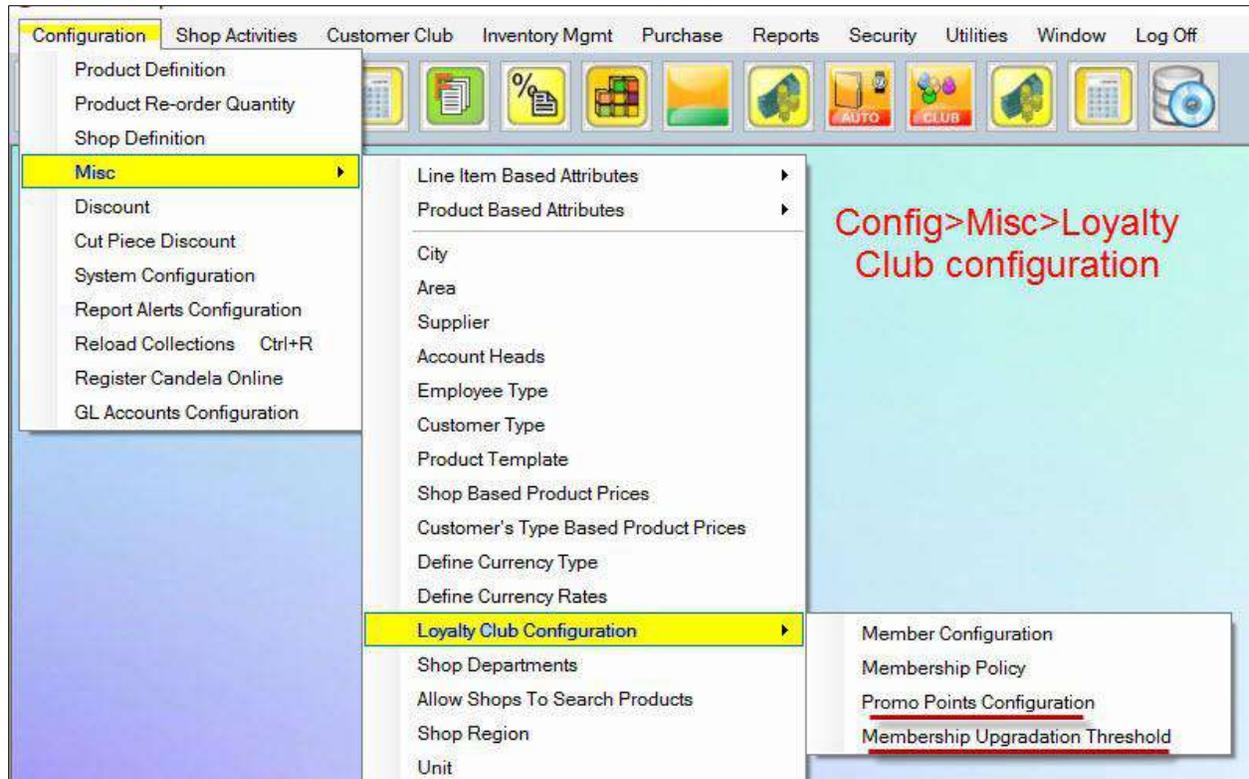
### A. Configurations for Activating the Tiered Program

#### I

1. Go to: [Security>Group Rights](#)
2. Select User Group
3. From Form Categories, select [Configuration>Misc>Loyalty Club Configuration](#)
4. Expand Loyalty Club Configuration
5. Expand **Membership Upgradation Threshold**
6. Mark the checkboxes
7. Expand **Promo Points Configuration**
8. Mark the checkboxes

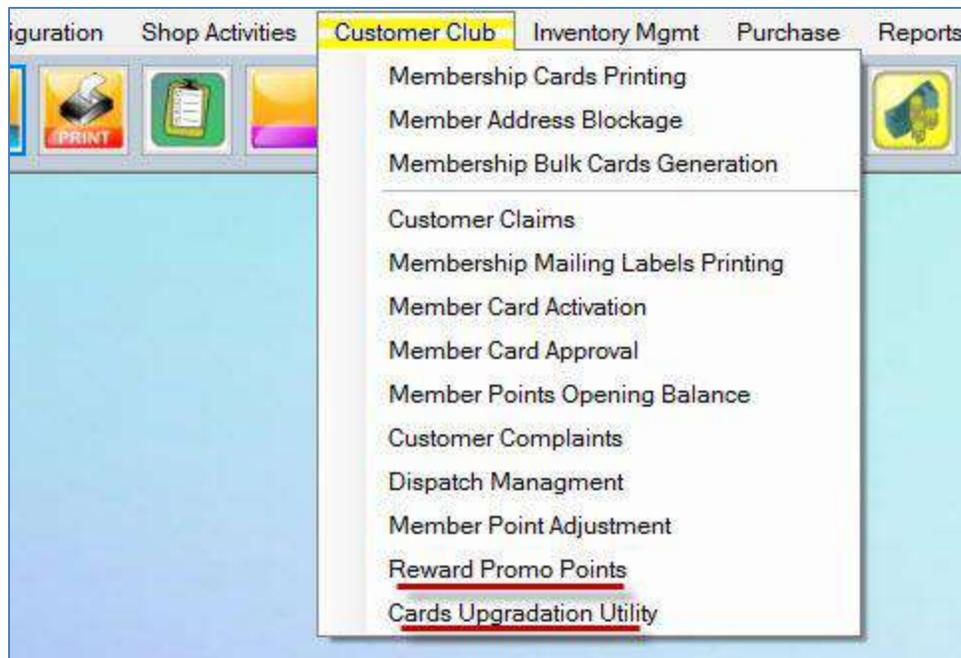
## 9. Save

After the above configurations, the following screens will become visible:



1. Go to [Security>Group Rights](#)
2. Select User Group
3. From Form Categories, select Customer Club
4. Expand Customer Club
  - Expand **Cards Upgradation Utility**  
Mark the checkboxes
  - Expand **Reward Promo Points**  
Mark the checkboxes

After the above Configurations, the following screen will become visible:



Once you have done the configurations, you can define when and how a loyalty club member will be upgraded or get bonus and promo points.

## Upgradation Threshold

Upgradation threshold will specify when a customer will automatically move up to the next level.

For example, you have defined a policy for regular membership where a customer earns 2 points for every purchase. To motivate customers to spend more, you can define a spend threshold at which the customer with a regular policy will automatically become a silver or gold member after earning a certain number of points.

For defining upgradation threshold, go to: [Configuration>Misc>Customer Loyalty Club Configuration>Membership Upgradation Threshold](#):

### Membership Upgradation Threshold

F  Exp Title

Drag a column header here to group by that column.

Card Types	Upgrade To	Upgradation Threshold Points	Bonus Points %	Duplicate Card Deduction Points
Ordinary	Silver	200.00	0.00	10.00
Silver	Gold	300.00	6.00	20.00
Gold	-Select-		9.0000	30.00

After earning 200 points the customer will automatically become eligible for silver membership, and will also start getting 6% bonus points. (6% will be calculated on the earned points of each invoice)

similarly, after earning 300 points the customer will become eligible for Gold membership and start earning 9% bonus points

### Duplicate Card Deduction Points

For every duplicate copy of the loyalty club card, members will lose certain points that will be defined on this screen in **Duplicate Card Deduction Points**

**Note:** Duplicate cards information is entered in the system on Customer Definition screen, where you will select the Customer and radio button ‘**duplicate card.**’ A pop up will appear where you will enter reasons for duplication.

For printing the duplicate card, go to [Customer Club](#)> [Membership Cards Printing](#)

**Note:** Card duplication history is available in report **N 10- Card Duplicate History**

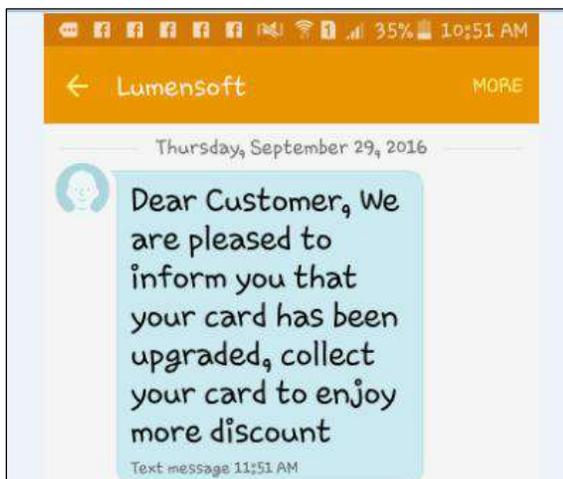
## Card Upgradation Utility

On the card upgradation utility screen you can check which members have become eligible for card upgradation and upgrade them.

The screenshot shows the 'Cards Upgradation Utility' web application. At the top, there is a 'Card Type' dropdown menu set to 'Silver' and a 'Search' button. A red arrow points to the dropdown with the text 'select card type'. Below the search bar is a table with columns: Member Name, Mobile, Status Points, and Upgrade To. A red arrow points to the first row, which contains 'Naureen', '03334565787', '2547.00', and 'Gold'. A red arrow points to the checkbox in the first column of this row with the text 'Mark this checkbox to select all appearing in the list view'. Another red arrow points to the 'Search' button with the text 'when you click search button, all members (holding the selected card type) who have become eligible for card upgrade will appear in the list view'. At the bottom right, there is a 'Send SMS' checkbox and an 'Upgrade >>>>>' button. A red arrow points to the 'Send SMS' checkbox with the text 'click'.

	Member Name	Mobile	Status Points	Upgrade To
<input type="checkbox"/>	Naureen	03334565787	2547.00	Gold

The customers will get SMS message about their upgradation:



On the Search tab of this screen, you can check details of the members who have been upgraded:

the above selection will show upgrades from ordinary to silver membership within the selected date range

*Note: Bonus points: After upgradation, customers will get bonus points on every purchase*

## Promo Points

You can also configure your system to mark certain days as extra-points days. When customers shop on these set days they get extra or **promo points**.

Go to: [Configuration>Misc>Loyalty Club Configuration>Promo Points Configuration](#)

**Promo Points Configuration** **HO Promo Points Configuration**

Event Name: Eids both  
 Date Range: 15/Nov/2016 - 15/Nov/2016

Exp Title

Line Item	Points
Search here....	
Crockery	3.00
Garments	2.00
Leather Goods	3.00

Annotations:  
 - select date range (points to Date Range)  
 - select event (points to Event Name)  
 - enter number of points for each line item (points to Points column)

### Invoice Type Showing Bonus and Promo Points

There is a special invoice that shows details of the following:

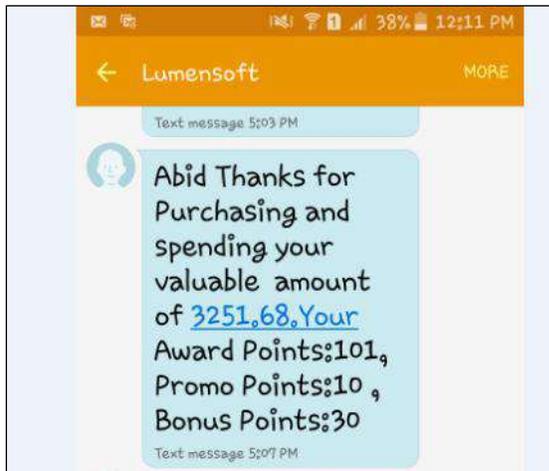
1. Award points on the policy (reward points given on birthdays and anniversaries will be added to this total)
2. Promo points (given on special event days)
3. Bonus points (given on moving to the next tier)

Go to: [Utilities>Setup and Configuration>Receipt Page Setup](#)

From Receipt type drop down, select **SR-19 Small (3 inch) with Promo Points LC**

### Special SMS to Customers on Receiving Points

- Go to [Utilities>Setup and Configuration>SMS Configuration](#)
- Expand Sales and Return
- Mark the Send SMS checkbox against SMS type 'SMS-SR-014.
- Now every time a customer shops and gets points s/he will get an sms conveying details of the points accumulated:



## Reward Promo Points Configuration

Loyalty club feature in Candela also allows you to offer special incentives to customers on milestone events like birthdays and anniversaries.

To configure birthday/anniversary messages and the number of points to be awarded, go to:

[Configuration>Misc>Loyalty Club Configuration>Promo Points Configuration>HO Promo Points Configuration](#) tab

**Promo Points Configuration** **Reward Promo Points Configuration**

Event Name: Birthday  
Promo Points: 5

SMS Text:  
(name), wishing you a very happy birthday from (company name). As a special birthday gift we are giving you 5 reward points. Celebrate in style!

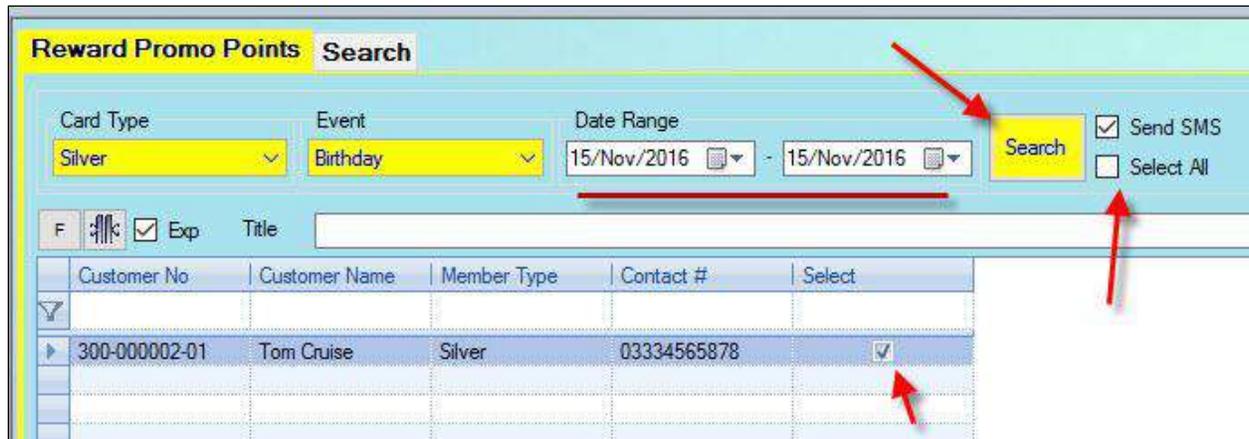
configure message

*Note: Customer information like date of birth and anniversary dates are saved on Customer Definition (Shop Activities>Customer Definition> screen*

## Sending Messages for Reward Promo Points

To intimate customer about the reward points on their special days, go to:

Customer Club>Reward Promo Points



The screenshot shows the 'Reward Promo Points' interface. At the top, there is a 'Search' tab. Below it, there are search filters: 'Card Type' (Silver), 'Event' (Birthday), and 'Date Range' (15/Nov/2016 to 15/Nov/2016). A 'Search' button is highlighted with a red arrow. To the right of the search filters, there are two checkboxes: 'Send SMS' (checked) and 'Select All' (unchecked). Below the filters, there is a table with columns: Customer No, Customer Name, Member Type, Contact #, and Select. The table contains one row with the following data: Customer No: 300-000002-01, Customer Name: Tom Cruise, Member Type: Silver, Contact #: 03334565878, and a checked checkbox in the Select column. A red arrow points to the checkbox in the Select column.

1. Select Card type
2. Select Event
3. Give Date Range
4. Click Search button
5. All card holders of the specified card type whose birthday or anniversary falls within the given date range will be listed in the grid.
6. Mark the checkboxes against the names you want to send the reward point message to.
7. You can select all by marking the checkbox **Select all**.
8. Click Save

## Search Tab

You can click the search tab to see details of the given points

## Reports

N-01 Member Sales Report With Points

N-11 Member Loyalty Club Points Report also shows details of the points earned by members.

