# LOYAX POS 2.3

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# How to work on the Mobile POS

## Activate the POS – log in with Merchant credentials

Login with your merchant credentials to associate this device with your business.

LOYAX   Validate Merchant

Custom Device Name

Custom Device Name    *a name you can recognize easily*

Merchant Username

Merchant Username    *your username from your Business Details*

Merchant Password

Merchant Password    *your password from your Business Details*

Sign in

The device needs to be associated with your business before you can start working with loyalty points. That is why you need to login first with the business username and password. Those are the same as for logging in the Merchant Portal.

Giving a name to the device is very useful if you want to disable it later.

Here are the steps:

In the **Custom Device Name** field type a name for your device by which to recognize it easily. The devices are listed in the **Merchant Admin Portal / Devices**.

In the **Username** field enter your **Merchant username**.

In the **Password** field enter your Merchant's password for the Merchant Portal. If you do not remember your merchant password, you can change it in the **Merchant Admin Portal** Login screen using the *Forgotten Password* button.

After successfully logging in as the Merchant this device can work only at your Merchant's venues.

Once registered to a merchant (you), the device can be used it in all your venues.

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To use it at another merchant, you need first to delete the device from your **Mobile Devices** in the **Merchant Portal**.

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# Employee Login

Your employee should login with their credentials before they can start work on the POS.
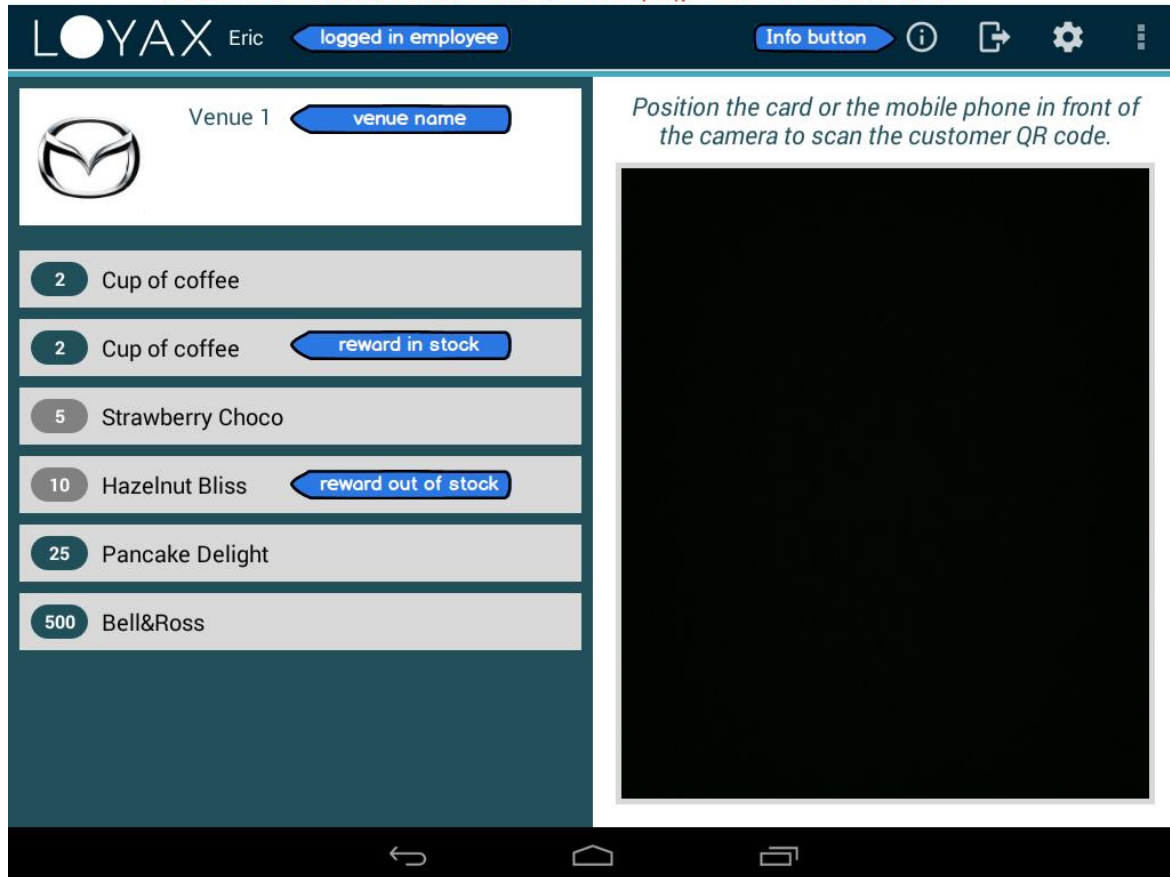


In the **Employee ID** and **Employee Password** fields enter the Employee ID and Employee Password values from the table row in the **Venue Details** screen.

# Home Screen



The name of the logged in employee is displayed at the top menu bar if **Employee Name** is populated in the Employee Table in **Venue Details** screen in the Merchant Portal.

Below it is the Venue name and the business logo image.

Below them are listed the **Rewards** available in the **active Campaign/Program**.

# After Scanning a Loyalty Card



After scanning a **customer's** loyalty card you see their **name**, accumulated **points**, booked **voucher**(s), **rewards and cashback** which can be redeemed. The rewards for which they need more points are also listed.

The **points giving** functions are grouped in the **left** part of the screen. You can select the **promo items** which the customer is buying. You can enter the **total amount of the purchase** with the **numpad**. If you entered a higher amount, you can decrease it using the minus button on the numpad.

You can give **discount** to the customer.

If an error has been made, you can **revert** the **last** operation or the **whole** transaction. A transaction can have several operations in it.

The **points redeeming** functions are grouped in the **right** part of the screen. Here you can process the redemption of rewards, vouchers and cashback.
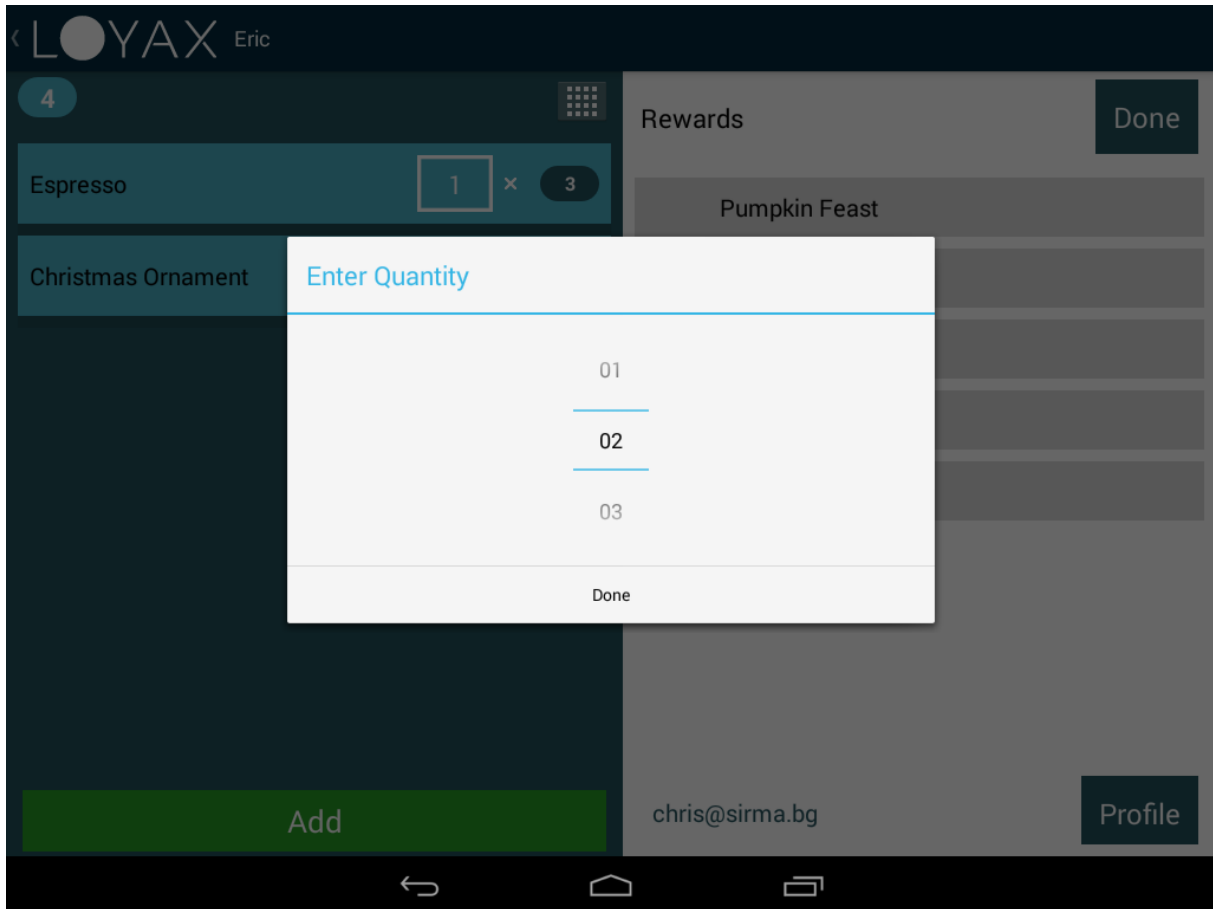
# Buy Items

Another way to give points is to select the items which the customer is buying and tap the **Add** button.

Tap on the item to select it.
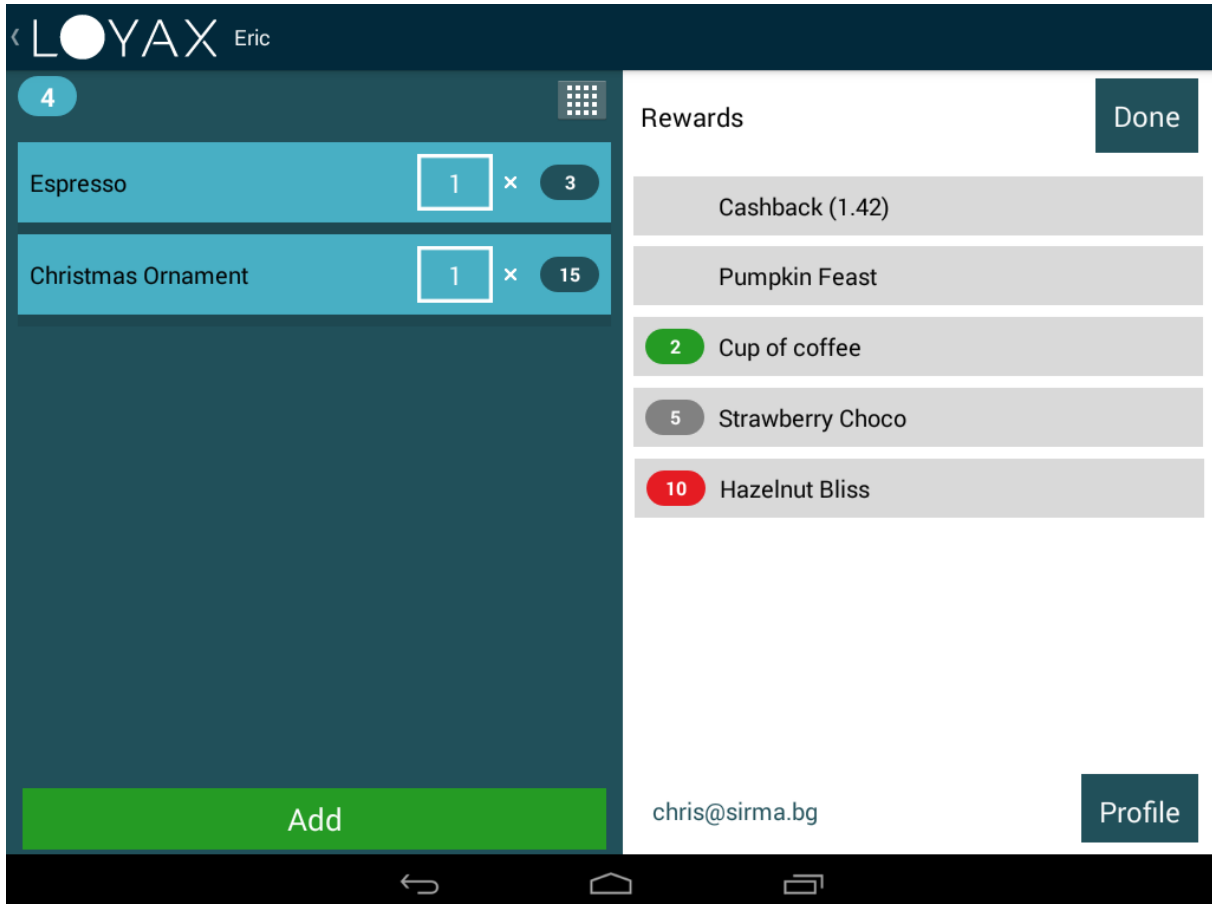


Automatically it will display quantity 1. If you want to input higher quantity, tap on the quantity rectangle.

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A quantity scroller will open for you to select the higher quantity.

# Revert Last Operation or Whole Transaction

You can revert (cancel) the last operation (adding items or amount) by using the **Revert Operation** button.
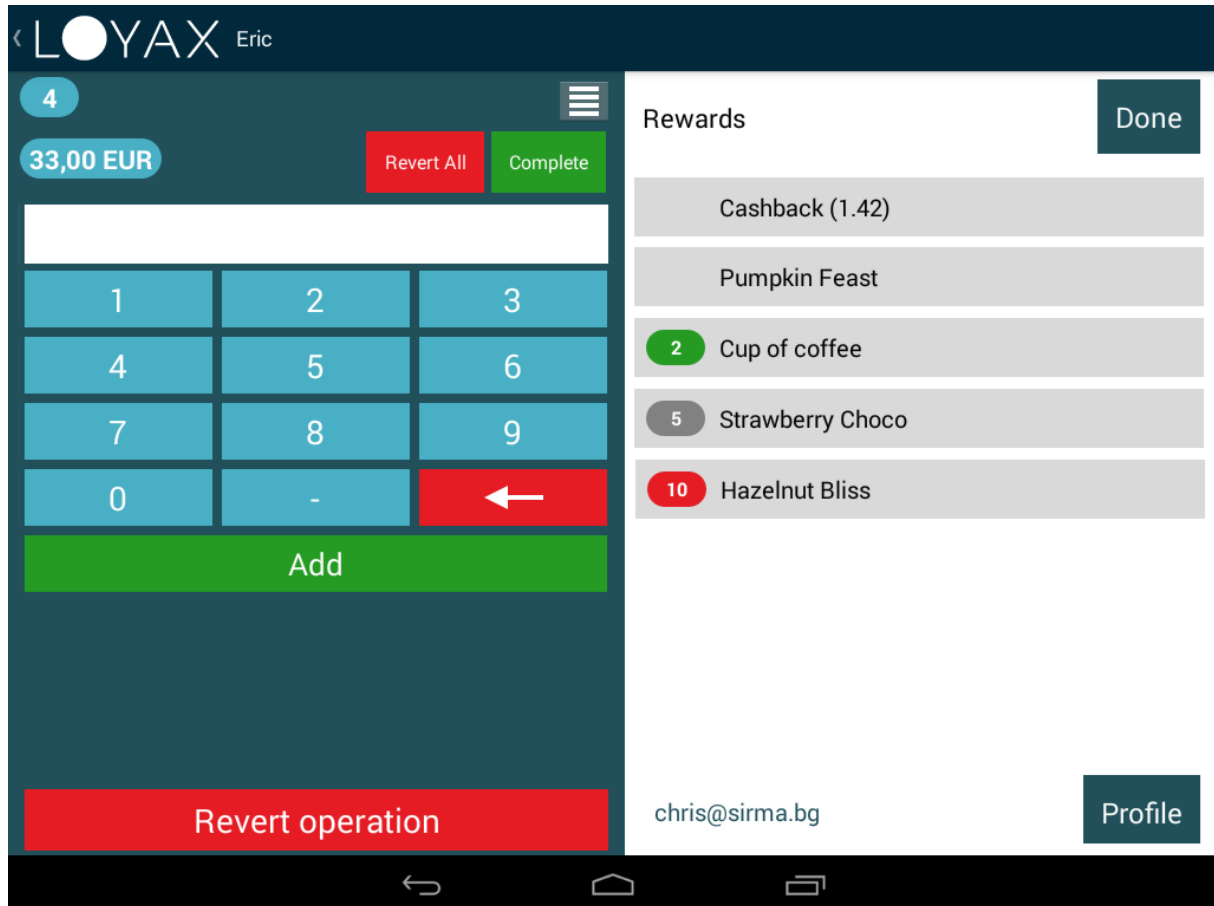


**Revert operation** button reverts only the last added item or amount. **Revert All** button reverts all operations in the transaction.

# Add Purchase Amount

To give points for the purchase amount use the **NumPad**. Enter the **total amount** of the purchase and press the *Add* button. The points will be calculated automatically.

If there are no items in the active Campaign/Program, the NumPad is opened by default.
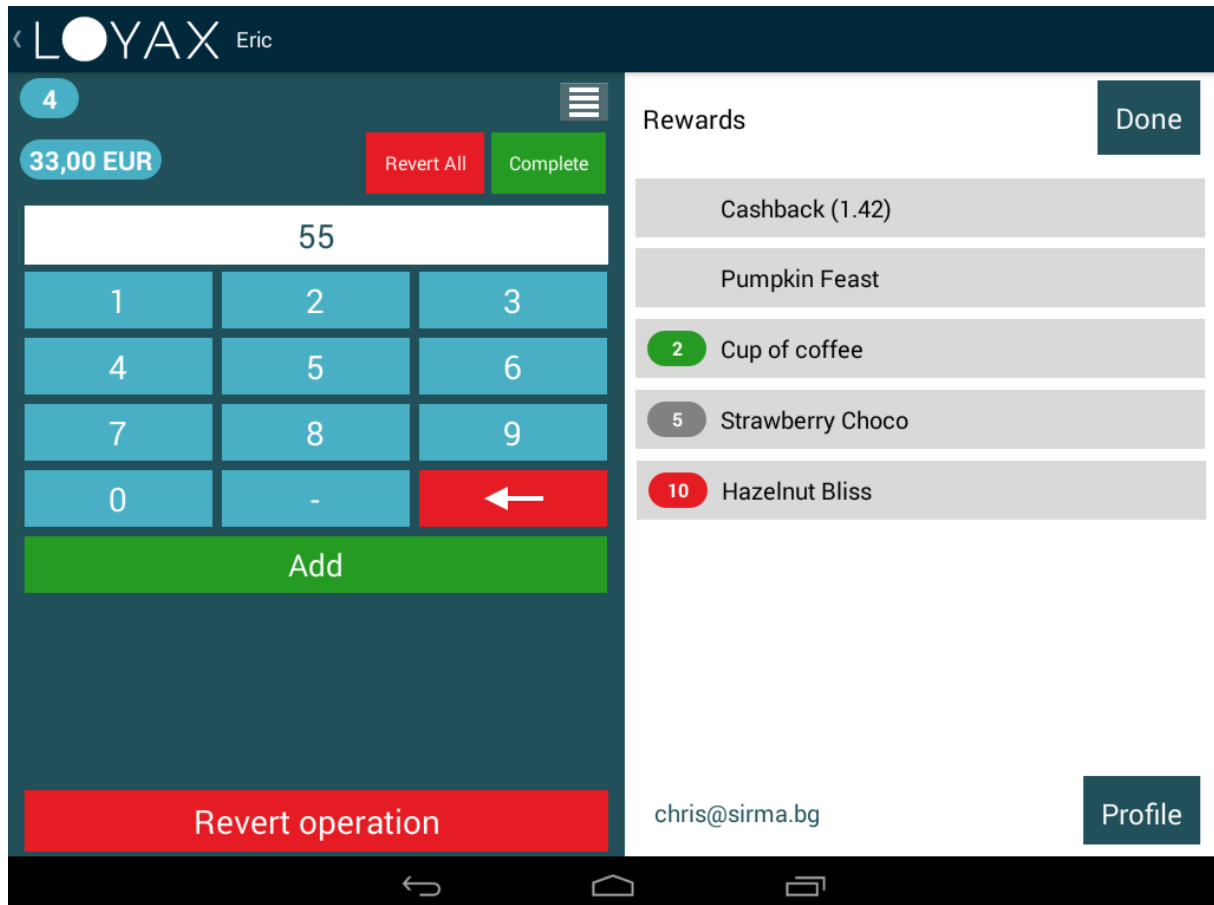


After you have entered the amount of the purchase, you can submit the transaction by pressing the button **Complete.**

# Apply Discount
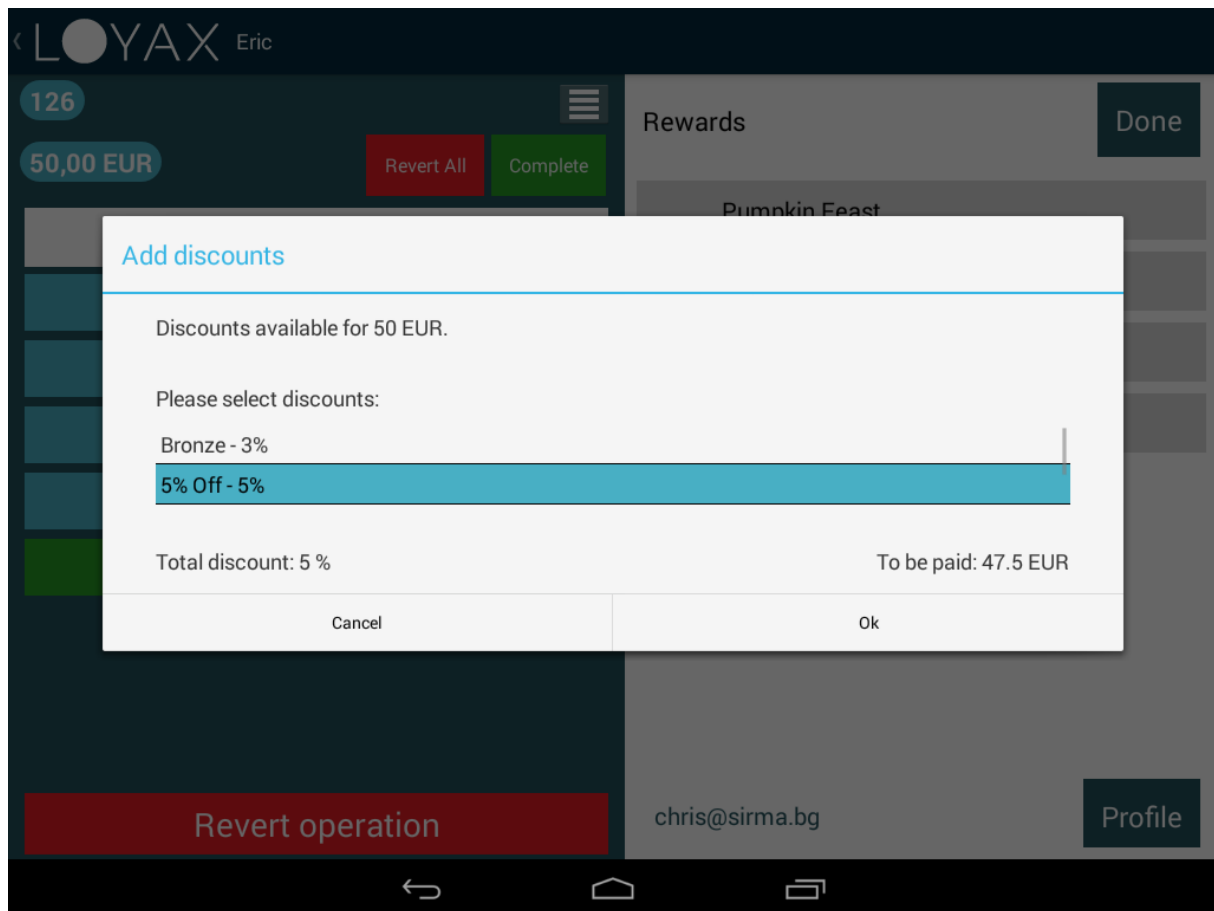


If the customer is eligible for a discount, a screen for selecting a discount will pop up. You can select the discount by tapping on its row. Tap on *OK* button to apply the discount.

If the customer is not eligible for a discount or there are no discounts in your campaign or program, this screen does not pop up.

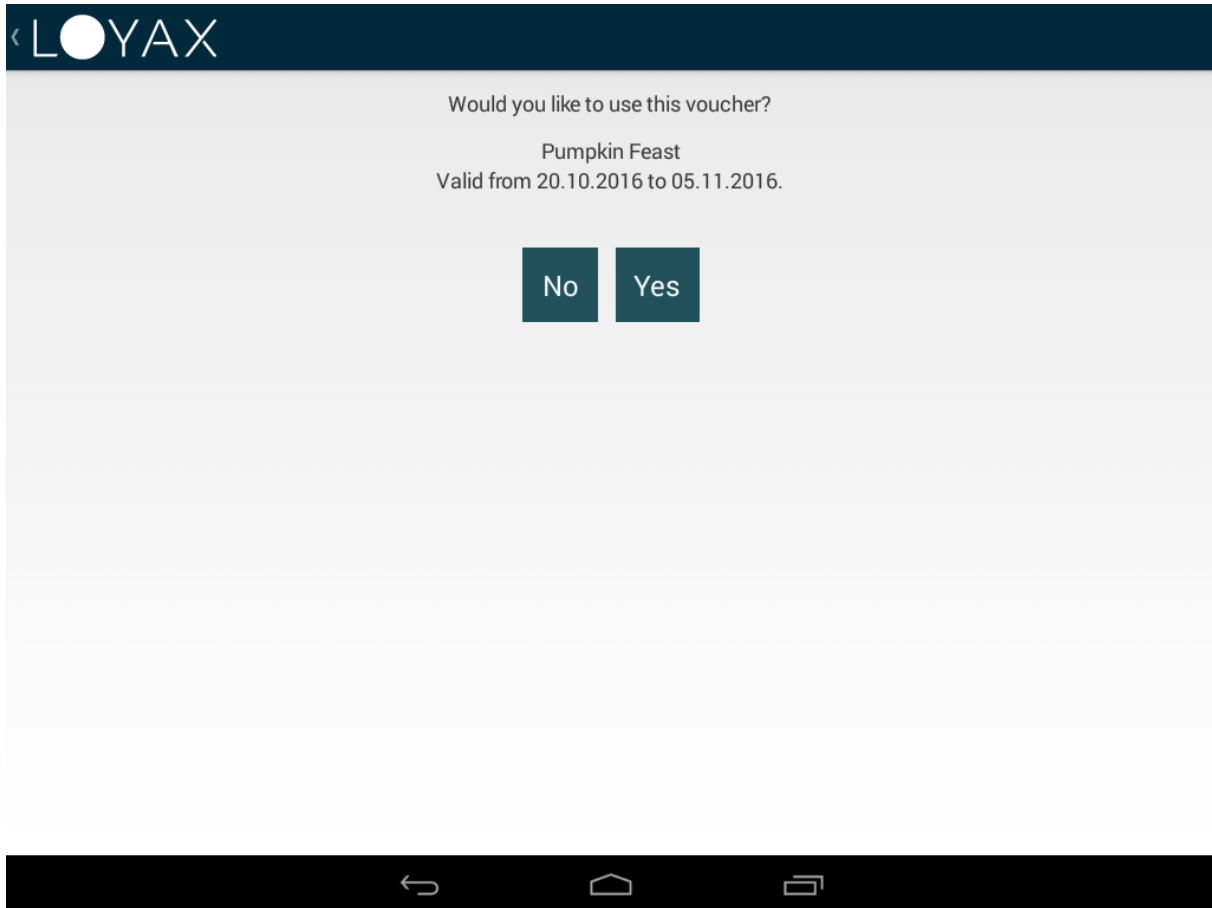www.loyax.com   sales@loyax.com

# Redeem Cashback

To give Cashback to the customer tap on its row and the following screen will open.



Tap *YES* to give this cashback amount to the customer.

# Redeem Voucher

To redeem a booked voucher tap on its row and the following screen will open.



Tap *YES* button to redeem it and go back to Home screen.

A voucher can be redeemed by the first person who presents the QR code at the venue. That person could be the customer who booked the voucher or their friend that received it as a present.

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# Redeem Reward

To redeem a reward tap on its row and the following screen will open.



Tap **YES** button to redeem it and go back to Home screen.

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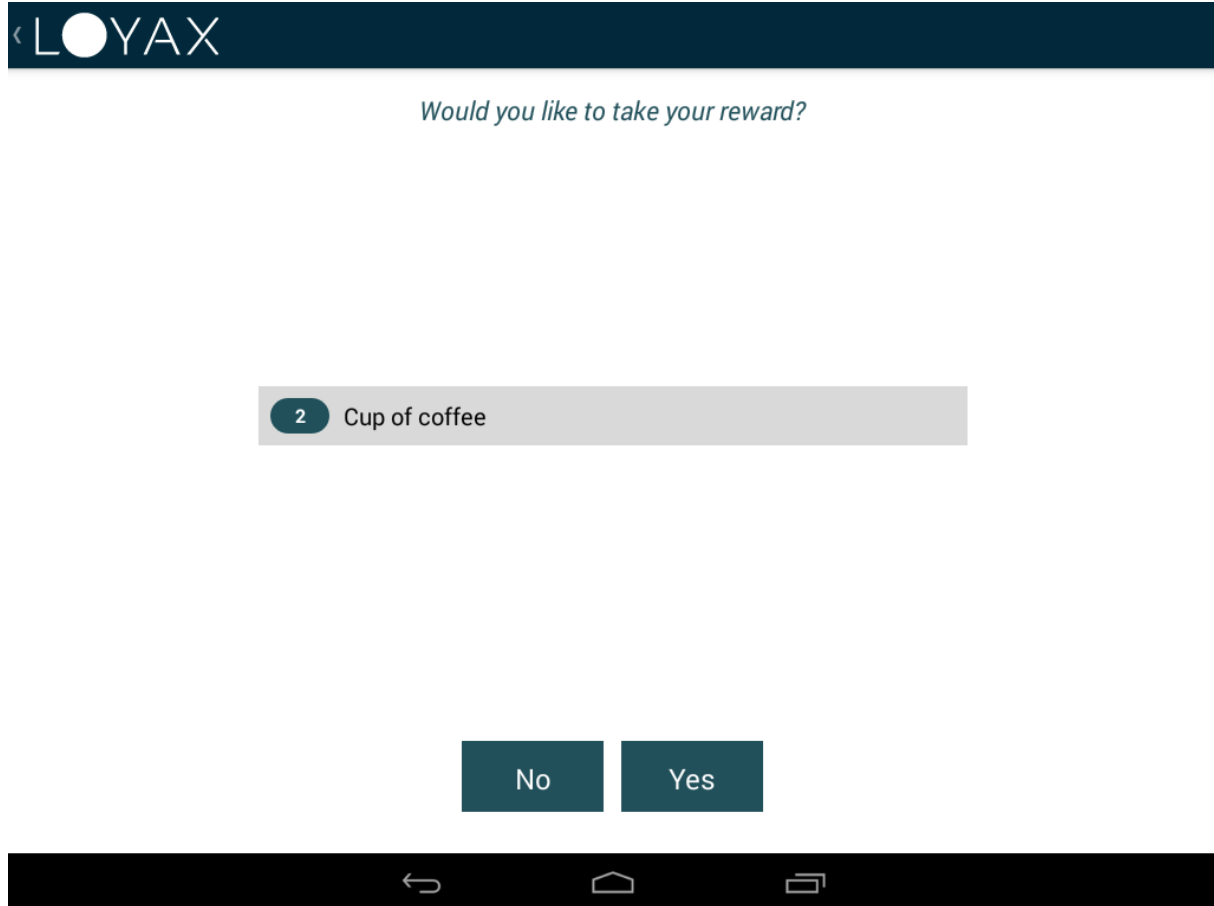
# Edit Customer Profile

You can check the customer's profile by tapping on the *Profile* button. You can edit it here, too.

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# Close Work with the Customer

To complete work with this customer tap the button *Done/Close*.

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# Invite a Friend QR Code

If the Referral event is active in your Program or Campaign, the first time a customer visits one of your venues they need to present the Loyax loyalty QR code first. You will be asked if he was referred.
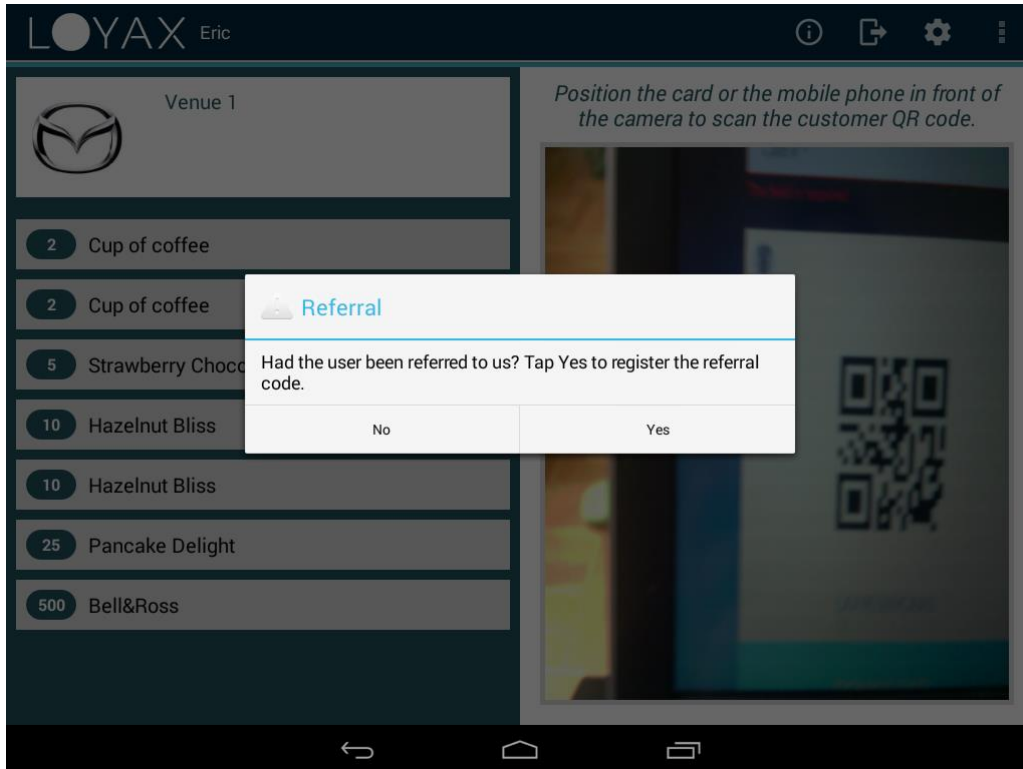


If the customer has a referral QR code, tap *Yes* and scan it in the next screen.

## Tiers

When you are operating with Tiers after a customer's card is scanned only the relevant items, rewards and discounts for his tier will be displayed.

## PIN Transaction Authorization

When your system has this feature enabled the customer will be required to input their PIN before the transaction is submitted.

## Offline Mode

Offline mode can be enabled for your system only if the PIN transaction authorization is not enabled.

If the Offline mode is enabled, when the internet connection breaks, you are automatically switched to work in Offline mode.

This means that if you are in the middle of a customer transaction, the transaction is saved. It is submitted as soon as the internet connection is restored.

While in Offline mode, you can scan customer's QR code and input their purchase amount.

Promo items purchase cannot be recorded.

The customer cannot redeem rewards, cashback or vouchers. The QR code from Invite a Friend cannot be processed.

When the internet connection is re-established, the stored transactions are submitted to the server. You can continue working as usual.