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LOYAX MERCHANT PORTAL 2.5

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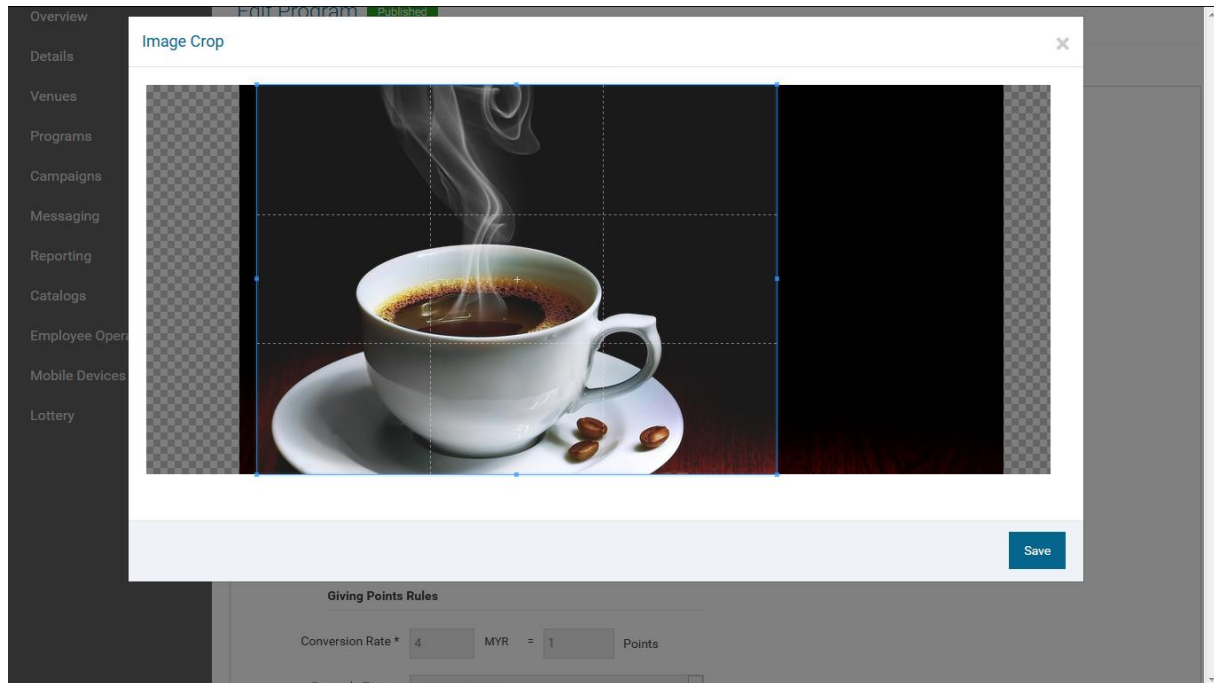
Welcome to Your Loyalty Management Portal

The screenshot shows the Loyax Merchant Portal 2.5 interface. At the top left is the LOYAX logo with the tagline 'BEYOND LOYALTY' and contact information. The top right shows 'All MAX', 'English', and a settings icon. The left sidebar lists navigation options: Overview, Details, Venues, Programs, Campaigns, Messaging, Reporting, Catalogs, Employee Operations, Mobile Devices, Lottery, and Users. The main 'Overview' section displays six summary cards: '5 TOTAL USERS' (blue), '0 POINTS GIVEN TODAY' (red), '0 REWARDS GIVEN TODAY' (purple), '1 TOTAL VENUES' (yellow), 'Brand New Program, ... ACTIVE PROGRAM' (orange), and 'VENUES LOCATION' (green). A 'Powered by LOYAX' logo is in the bottom right corner of the dashboard.

The first screen after a successful log in displays summary information about your business.

- **Total Users** – registered at your venues since you joined the loyalty platform.
- **Points Given Today**
- **Rewards Given Today**
- **Total Venues** - click on it to open the Venues list screen.
- **Active Loyalty Program Name** - click on it to open the active program details screen.
- **Venues Location** - click on it to open a map with all your venues. When you click on the venue balloon, the **Venue Details** screen opens.

Images



The images format should be **JPG, PNG (without transparency) or BMP**.

The **Business Logo** image in your **Business Details** should be with **ratio 1:1** and size at least **512x512px** or larger.

All other images (for Program, Voucher, Product, Reward, Venue) should have **ratio 4:3** and size at least **1440x1080px** or larger.

Image Crop

When you select an image it is opened in a cropping tool. If your image is smaller than the required minimum, you will get a message. If your image is larger than the required minimum you can select a portion of it to be cropped as your logo. After successful upload a thumbnail of the image is displayed.

Your Business Details

The Details screen is where you set and edit your business' details.

Brand Name, **Username** and **Business Email** are prepopulated by the Super Admin. You can edit them any time you like.

If you change the **Username**, **make sure to remember the new username**. You will need it the next time you want to log in the **Merchant Portal** or setup a new mobile **POS**.

Contact Info

This is the contact info of your company's person responsible for communication with Loyax.

- **Contact Person**
- **Phone Number**
- **Email**

Business Info

- **Brand Name** – your brand's name as displayed in the **User Portal/Partners**.
- **Username** – used for **logging into** the **Merchant Portal** and for **activating** a new **POS** device.
- **Email** – your brand's contact email. It should be valid and unique for the system. No other merchant should be registered with it. An email will be sent to this email address when your Loyalty Program is close to expiration date.
- **Business Phone** – your business phone number as displayed in the **Venue Details** when no venue phone is set. It will be visible in the **User Portal** and in the **User mobile applications**.

- **Website** – your business’ website address. It will be visible in the **User Portal** and in the **User mobile applications**.
- **Facebook** – your Facebook address.
- **Category** – the type of business you run. It will be visible in the **User Portal** and in the **User mobile applications**.
- **Currency** – selects the abbreviated labels that will be visible in the **Merchant Portal, User Portal, in User mobile applications** and in the mobile **POS**.
- **Logo** – your business logo should be with **ratio 1:1** and size at least **512x512px** or larger. It is displayed in the **User Portal/Partners**.

Your Portal Settings

The screenshot shows the Loyax Merchant Portal 2.5 interface. At the top left is the LOYAX logo. In the top right, there are options for 'All MAX', 'English', and a settings gear icon. The left sidebar contains a list of menu items: Overview, Details, Venues, Programs, Campaigns, Messaging, Reporting, Catalogs, Employee Operations, Mobile Devices, Lottery, and Users. The main content area is titled 'Overview' and contains six data cards arranged in a 3x2 grid:

- 5 TOTAL USERS** (Blue card)
- 0 POINTS GIVEN TODAY** (Red card)
- 0 REWARDS GIVEN TODAY** (Purple card)
- 1 TOTAL VENUES** (Yellow card)
- Brand New Program, ... ACTIVE PROGRAM** (Orange card)
- VENUES LOCATION** (Green card)

At the bottom right of the interface, it says 'Powered by LOYAX'.

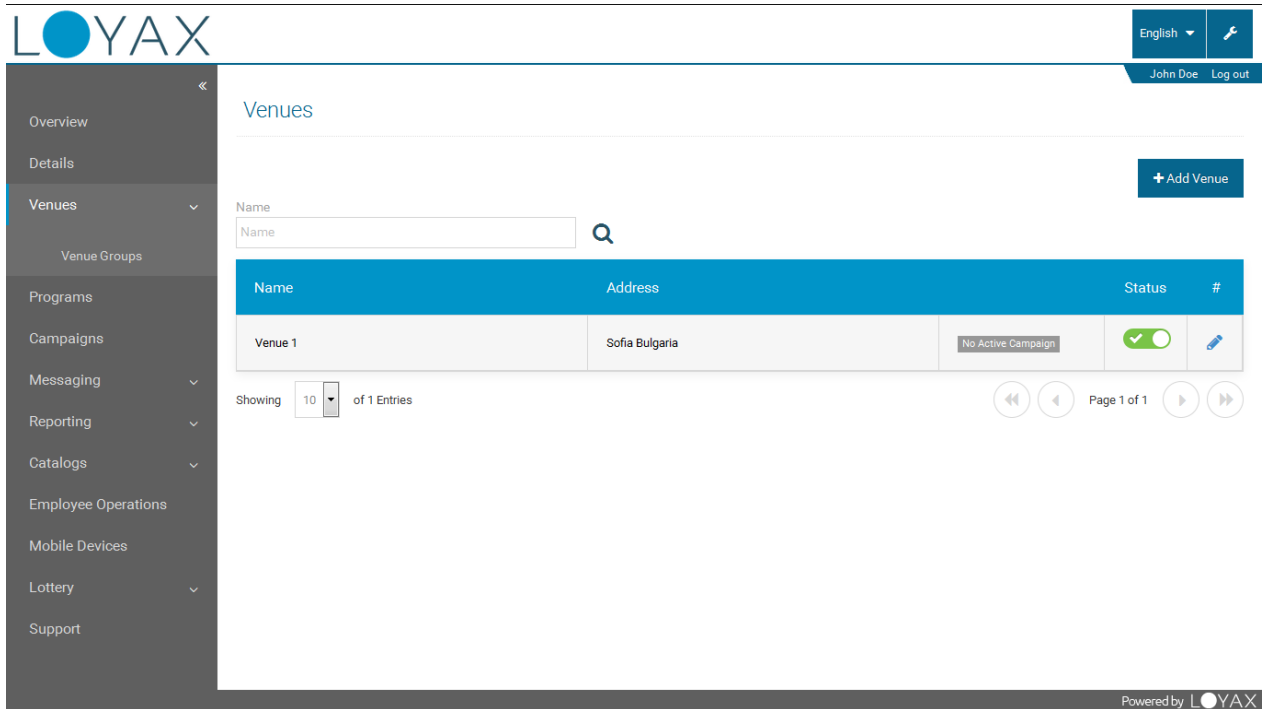
When you click on the **cog icon** in the upper right corner, the **Settings** for your business will open. They are important for the correct data in your reports.


- **Time Zone** – your local time zone
- **Currency Format** – this is the format used in reports
- **Date Format** – this is the format used in reports

Support

You can send an email message to the Administrator of the loyalty platform.

Venues




English  John Doe Log out



Overview
Details
Venues
Venue Groups
Programs
Campaigns
Messaging
Reporting
Catalogs
Employee Operations
Mobile Devices
Lottery
Support


Venues

+ Add Venue

Name

Name 

Name	Address	Status	#
Venue 1	Sofia Bulgaria	No Active Campaign 	

Showing 10 of 1 Entries 

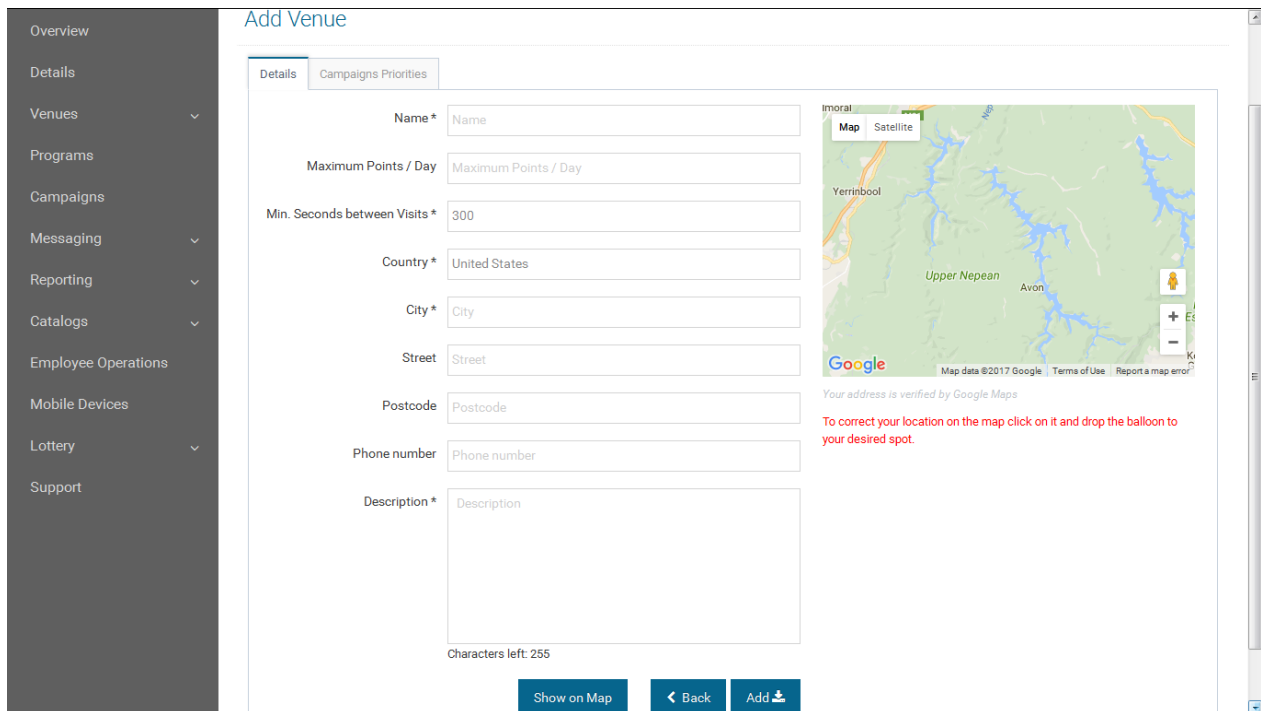
Page 1 of 1

Powered by LOYAX

A venue is the place where your customers come to shop, to collect points and to redeem rewards, vouchers and discounts. You can have an unlimited or limited number of venues.

All active venues are **displayed** in the **User Portal** and in the **User mobile applications**. If you disable a venue, it is no longer visible.

Add Venue



The screenshot shows the 'Add Venue' form with the following fields:

- Name *
- Maximum Points / Day
- Min. Seconds between Visits * (300)
- Country * (United States)
- City *
- Street
- Postcode
- Phone number
- Description * (255 characters left)

Buttons at the bottom: Show on Map, Back, Add.

To add your venue you need to fill in all required fields. If you want more venue details to appear on the **User Portal** and in the **User mobile applications**, fill in the optional fields, too.

The required fields are:

- **Name** – the venue name
- **Minimum Seconds between Visits** – used for statistics and for registering a visit. It is used when **Event Visit is not setup in a campaign**. The parameter is used in determining whether the customer did a new visit. If the interval between the current visit and the previous one is less than the minimum seconds - no visit is recorded, if not - a new visit is recorded.
- **Country** – automatically populated with the Superadmin default country. Only a valid country is allowed. To fill in the required fields automatically, click on your location on the map. If the country, city and street are populated by hand, the postcode code will be filled in automatically with **Google Maps data**.
- **City** – the city where the venue is. Only valid cities are allowed. If the country, city and street are populated, the postcode code will be filled in automatically with **Google Maps data**.
- **Description** – This is the venue description that will be visible in the **User Portal** and in the **User mobile applications**.

The optional fields are:

- **Maximum points/Day** - the maximum points that can be given to one (1) end user per day. Only integers are allowed.
- **Street** – the street and number where the venue is. If the country, city and street are populated, the postcode code will be filled in automatically with **Google Maps data**.

- **Postcode** – Fill in the postcode of the venue address. If the country, city and street are populated, the postcode code will be filled in automatically with **Google Maps data**.
- **Phone Number** – the venue phone for contacts, information or reservations.
- **Images** – you can upload up to 8 images of your venue.

Show on Map button – displays the location of the venue on the map, verifies the address on Google Maps, corrects the typed information and fills in the missing fields.

Google Maps and Address

The screenshot shows the 'Edit Venue' form with the following details:

- Name ***: Kuala Pekan Malaysia
- Maximum Points / Day**: 500
- Min. Seconds between Visits ***: 300
- Country ***: Malaysia
- City ***: Pekan
- Street**: Lorong Geylang 2
- Postcode**: 26600
- Phone Number**: Phone Number
- Images**: A 'Choose file' button and a grid of 8 placeholder images.

The map on the right shows a location in Kuala Lumpur, Malaysia, with a red balloon marker. Below the map, text reads: "Your address is verified by Google Maps. To correct your location, click on the map and drop the balloon to your desired spot."

All addresses are verified against Google Maps. Those include **venue and customer address**.

For venue, if the country, city and street are populated, the postcode code will be filled in automatically with **Google Maps data**.

There are some locations which are not correctly displayed on the map after you click the **Show on Map** button.

There may be case when the address fields are populated automatically with Google Maps data and it is no longer correct. In these cases you can **correct the location** on the map first.

1. **Click** on the map and **drop** the balloon to your desired spot. The chosen coordinates will be saved.
2. You can change the information in the address text fields if it is incorrect. The corrected address and new location coordinates will be saved after pressing the **Save** button.

Employees

* The uploaded image should be minimum 1440x1080px, JPG, PNG (no transparency) or BMP

Description * Fantastic experiences at our venue!

Show on Map Back Save

+ Create Employee

Employee ID	Employee Password	Employee Name	Status	#
1095	20961	Eric	<input checked="" type="checkbox"/>	
1094	534195	Peter	<input type="checkbox"/>	
1090	209178	Anna	<input checked="" type="checkbox"/>	

Showing 10 of 3 Entries Page 1 of 1

Powered by LOYAX

An employee has a **username** and **password** for logging in the POS.

Use the **+Create Employee** button in **Venue Details** to add a new an employee.

Edit the new (top) row to add the employee name or nickname.

If an employee **works at more than one venue**, they should have **different username / password** pairs **for each venue** they will work at. If an employee starts work at another venue and logs in with their username / password from their previous venue, the transactions will be logged in the previous venue.

Mobile Devices

The screenshot shows the 'Mobile Devices' page in the Loyax Merchant Portal. The page has a dark sidebar on the left with a menu containing: Overview, Details, Venues, Programs, Campaigns, Messaging, Reporting, Catalogs, Employee Operations, Mobile Devices (highlighted), Lottery, and Users. The main content area is titled 'Mobile Devices' and features a search bar with the placeholder 'Name'. Below the search bar is a table with two columns: 'Name' and '#'. The table contains two entries: 'aceR' and 'pixi test', each with a trash icon in the '#' column. At the bottom of the table, it says 'Showing 10 of 2 Entries' and 'Page 1 of 1' with navigation arrows. The Loyax logo is in the top left, and 'All MAX English' is in the top right. The footer of the page says 'Powered by LOYAX'.

This is a list of all **POS devices** which are **used in your venues**.

When you start the POS application for the first time on a new tablet

1. Enter a name for the device
2. Login with your **business username** and **business password**. This links this POS device with your business
3. Your employee can login and service your customers

You can view the transactions they processed during their work hours in Employee Operations.

Once a **device is paired with your business** it cannot be used at another business' venue. Your device **can be used at any of your venues**. What is important for the transactions is for each employee to be logged in with his/her username/password for the venue they currently work at.

Give your devices meaningful names by which you can recognize them later on. This would be handy when you want to delete a device you no longer use or you want to use it in another business.

When a device is deleted, the Mobile POS application automatically disconnects.

Good Practice

The employee logs in at the start of their shift and logs off at the end of it.

Venue Groups

The screenshot shows the 'Create Campaign' interface. On the left is a dark sidebar with navigation links. The main area has a header 'Create Campaign' and a 'Select Venue' section. Below this is a search bar and a table with columns 'Name' and 'Type'. The table lists three options: 'All MAX' (Business), '1 Group' (Venue Group), and 'Kuala Pekan Malaysia' (Venue). Navigation buttons for '< Back' and 'Next >' are at the bottom of the table. The footer of the page says 'Powered by LOYAX'.

Name	Type
All MAX	Business
1 Group	Venue Group
Kuala Pekan Malaysia	Venue

Venue groups are designed for easier management of campaigns.


You can place one or more venues in a group. When you create a campaign you can select the group of venues where it will be applied.

NB! The *Add* button is in the top right corner of the screen.

Program

The screenshot displays the 'Programs' management interface. It features a sidebar with navigation options and a main content area with a table of programs. The table has the following data:

Name	Duration	Status	#
All MAX 2017 Loyalty Program	06.01.2017 - 31.12.2017	Canceled	
Brand New Program, No Tabs	14.02.2017 - 31.12.2017	Published	
DraftProgram	08.03.2017 - 08.03.2017	Draft	
2018 Loyalty Program	01.01.2018 - 31.12.2018	Published	

When you create a new loyalty program it is initially in **Draft** mode. You can edit (by **clicking** on the **row** or on the **icon** ) all its elements as long as it is in **Draft** mode. You can have several programs in Draft mode. You can **cancel** a draft program.

When you are ready to activate the program, you need to **publish** it. Its start and end date should be at least today. No program with start and end dates in the past can be published. After a program is published you can still **edit** its **End Date**, **Description** and **Image** provided another program does not start immediately after it.

When there is more than one page with programs, the selected **page** is the one with the **active program**. The active program is highlighted with **gray background**.

Past and **cancelled** programs **name and duration are grayed**. You can only view their settings without editing. You can also **copy** the settings of the program **in a new draft program**.

Steps to start a program

1. **Create Program**
2. **Publish it**

The users can start collecting points.

You can change the published program's

1. **end date**
2. **description**
3. **image**

Details

Name*

Active From*

Active To*

Description

Characters left: 32767

Giving Points Rules

Conversion Rate* MYR = Points

Rewards Type

i Rewards Type is the same in all campaigns associated with a Loyalty Program. It cannot be changed in a published Program.

Calculate points after discount

i Give Points on the amount paid after deducting the discount.

[← Back](#) [Add +](#)

The program now is a **container with rules for points collecting and expiring**. All other elements are in the campaigns.

You will get an automatic email before the program expires. You can extend it if you want your customers to keep their points.

Campaign

The screenshot displays the 'Campaigns' section of the Loyax Merchant Portal. It features a sidebar with navigation options like Overview, Details, Venues, Programs, Campaigns, Messaging, Reporting, Catalogs, Employee Operations, Mobile Devices, Lottery, and Support. The main content area shows a calendar for the venue 'Kuala Pekan Malaysia' and program 'Brand New Program, No Tabs'. A timeline from 2017-02-13 to 2017-02-18 is shown, with a vertical line for 'Today' on 2017-02-15. Three campaign bars are visible: 'Brand New Program, No Tabs' (published, 2017-02-14 to 2017-12-31), 'Visit QR Code Only' (published, 2017-02-14 to 2017-12-31), and 'Rewards Type' (draft, 2017-02-14 to 2017-12-31). A legend at the bottom right identifies the colors: green for Published, yellow for Draft, grey for Expired, and red for Canceled.

A loyalty campaign is a short **venue-specific** reward program. Its active period must be **within the duration of the associated** Loyalty Program. **All campaigns end when the program expires or is canceled.**

The names of all published campaigns for the current Program are visible in the Venue details in the **User Portal** and in the **User mobile applications**.

A **campaign** can be **set-up** to run for

- **one venue**
- **a group of venues**
- **all business venues (business level)**

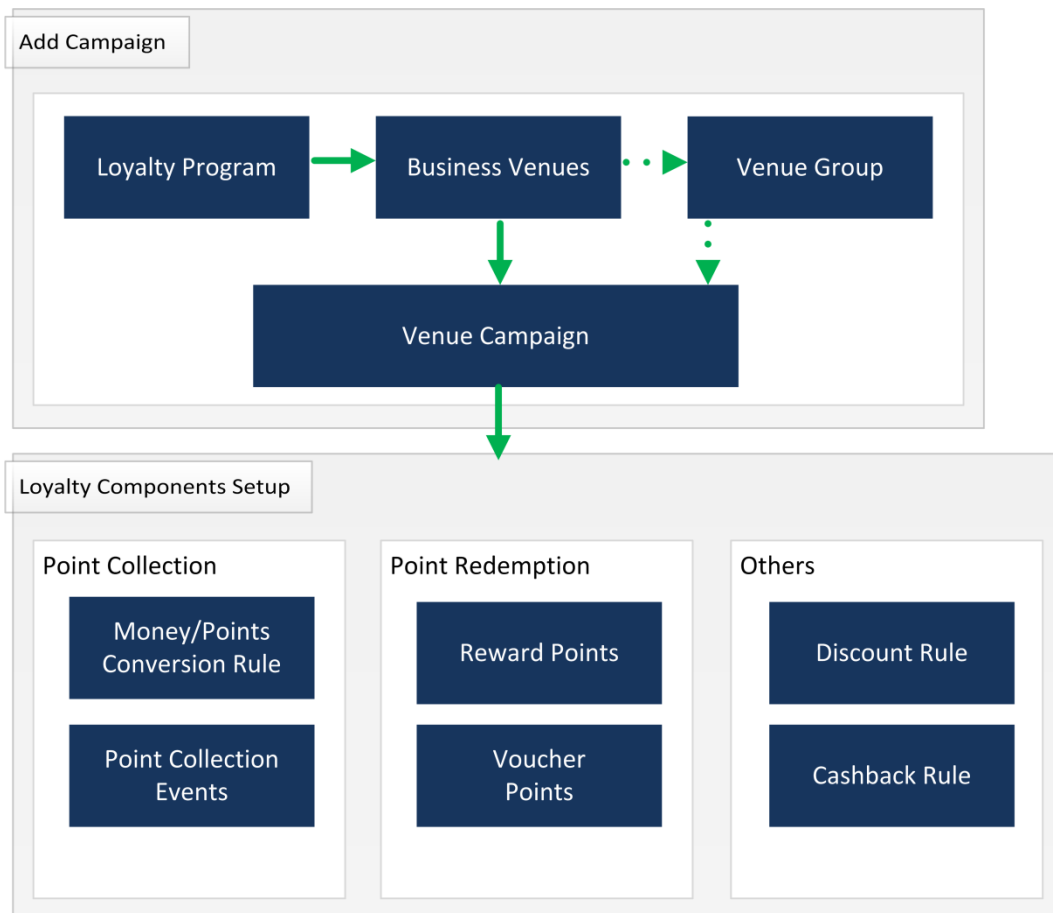
A new venue can be added to the group at any time.

After a campaign is **published** you can only **change** its **quantity of rewards** and **vouchers**. All other elements are non-editable.

If you need to **update** the price/points of a Reward, Event, Cashback or Item, create a simultaneous campaign with an identical Reward or Event and updated price/points. Place this campaign **at the top in the venue's Campaigns Priorities tab**. This is the campaign with the **Highest Priority**. Publish it.

If you need to **add** new Rewards, Events, Items, Vouchers or Discounts, create a simultaneous campaign and place it below the Highest Priority campaign in the venue's Campaigns Priorities tab. Publish it.

Create Campaign



To create a new loyalty campaign you need to have:

- **Loyalty Program (Published or Draft)**
- **Venue or Venue Group**

Click on the row with the **program** and **venue/venue group** to **select** them. If your program is active today, it is selected automatically.

After a campaign is created, it is in **Draft** mode. You can create and edit the campaign elements:

- **Money/Points conversion rate** (initially copied from the program)
- **Events**
- **Items**
- **Discounts**
- **Rewards**
- **Vouchers**
- **Cashback**

When you change the venue campaign Money/Points conversion rate it overrides the selected Loyalty Program rule at this venue. After the campaign ends, the program conversion rate applies.

Example:

Your Loyalty Program is set to run for 2 years.

*You want to **run a promotion** for 3 months **at one of your venues**. You create a **campaign** for that venue.*

- *You set a different conversion rate – you will give more points for purchases made at this location to promote more visits.*

After the 3 months are over, the Conversion rate in the Program will be applied when a customer makes a purchase.

There can be **more than one campaign running** at one and the same time (**simultaneously**). Their **durations** can **overlap** entirely or for some period.

Campaigns are **complementary**

This means that **new elements can be added** in the next published campaign.

Elements cannot be removed from published campaigns.

Example:

*Campaign A offers rewards **K, L and M**.*

*Campaign B offers rewards **M, R and S**. The customers would see rewards **K, L, M, R and S**. The 'price' of reward **M** would be taken from the campaign with the Highest priority in the venue's Campaigns Priorities tab.*

*If you want to remove reward **L**, that can be done only if you cancel the running campaign.*

- **Initial Priority** – when you create a new Campaign, the **Initial Priority is used only to place the new campaign on top or at the bottom in the venue's Campaigns Priorities tab**. It is not used after that.

The campaign **ordering by priority** is done only in the **venue's Campaigns Priorities tab**.

When a **venue with campaign(s)** is **added** to a **Venue Group** that has campaigns, a **notification with a list with Venues to Review** is displayed prompting you to review each Venue's campaign priorities.

A similar notification pops up when **several venues** are **added** to a **Venue Group**. The merchant should go in each venue and edit the campaigns priorities.

When an **identical** element is present in more than one campaign only the **event, reward, item, cashback elements** in the **Highest priority** campaign will be displayed on POS, User Portal and on the user mobile applications.

The Highest priority campaign in on top of all other campaigns in the Venue.

Simulateneous Campaigns

After you publish a campaign you may want to

- **add a new reward** – create a new campaign with the same end date as your original campaign and add the new reward in it
- **change the 'price' of a reward** – in a draft or new campaign with the with the same end date as your original campaign, add the same reward with a different 'price'.
- **change the Conversion Rate** – in a draft or new campaign with the with the same end date as your original campaign, change the Conversion Rate
- **change Event points** – in a draft or new campaign with the with the same end date as your original campaign, change the Event points
- **add new Voucher** – in a draft or new campaign with the with the same end date as your original campaign, add the new voucher
- **add new Discount percentage or rules** – in a draft or new campaign with the with the same end date as your original campaign, add the Discount percentage or rules
- **change the Cashback percentage** – in a draft or new campaign with the with the same end date as your original campaign, change the Cashback percentage
- **change the Item price** – in a draft or new campaign with the with the same end date as your original campaign, change the Item price

You can do the above changes in one or more campaigns.

When you *publish* a new or draft **Venue campaign** with **Highest Priority** (on top of the venue's Campaigns Priorities tab):

- **Conversion rate, Event points** and **Cashback %** values from this campaign are displayed on POS, User Portal and in the user mobile applications
- **Discount % or Rules** – discounts from **all** published campaigns in the venue are listed on POS, User Portal and mobile applications. The employee can select which one(s) to apply.
- **Reward price** - when one and the same Reward is present in more than one campaign, the price that is displayed on POS, User Portal and in the user mobile applications is that of the Reward in the **highest priority campaign** in the venue. This is the campaign on top in the Campaigns Priorities screen.
- **Item price** – When one and the same Item is present in more than one campaign, the price and the points of the Item in the **highest priority campaign** in the venue is listed on POS after scanning a Loyalty card.

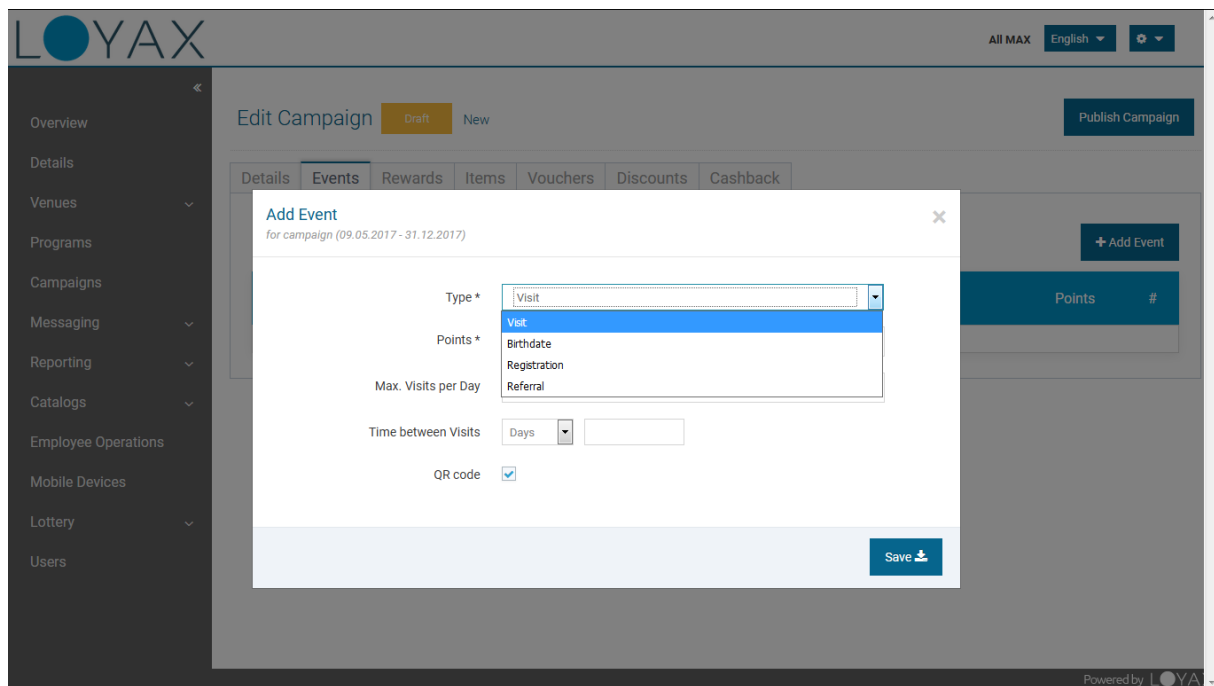
When you *cancel* a **Venue campaign** with **Highest Priority** in the venue's Campaigns Priorities tab, the campaign below becomes the campaign with Highest Priority.

- Conversion rate, Event points and Cashback % values from the campaign below are displayed on POS, User Portal and in the user mobile applications.
- Discount % or Rules – discounts from the canceled campaigns in the venue are NOT listed on POS, User Portal and mobile applications. Discounts from the published campaigns only are listed. The employee can select which one(s) to apply.
- Vouchers
- Reward price – the prices which are attached to the next campaign ordered by priority are displayed on POS, User Portal and in the user mobile applications.
- Item **price** – the prices which are in the below campaign are displayed on POS, User Portal and in the user mobile applications.

To update an element in a published campaign

1. Add an identical element in a new or draft campaign
2. Update its points / price
3. Place the campaign on top of all other campaigns in the Venue's Campaign Priorities screen
4. Publish it

Events



Program or Campaign events are tools that will automatically **add points to the customer balance**. There can be **only one of each event type** per campaign. Events are active throughout the loyalty campaign active period.

Here is how points will be awarded to your customer if you have any of the event types active in your published campaign:

- **Visit**
 - **On POS** – when your employee scans the customer’s loyalty card QR code (printed or in the user mobile application)
 - **Customer self-checkin** via the user mobile application – when the customer scans the visit event QR code exhibited at your venue. For that you need to check the **QR code** checkbox, to download, print and post the generated pdf in your venue.
 - **Max Visits per Day** – how many times the customer can receive points for a visit.
 - **Time between Visits** – how much time should pass before the customer can get new points for visit. The parameter is used to determine whether the user should be awarded points for this visit in the venue. If the interval between the current visit and the previous one is less than the set Time between Visits, no points are given. If not - the user is awarded the amount of points for the event.

The priority for giving points is:

- **Time between Visits**
- **Max Visits per Day**

NB! Any scans that are within the event's Time between Visits or the venue's Min. Seconds between Visits interval is considered the same visit.

- **Birthdate** – when a customer has a birthdate within the loyalty **campaign From-To period**. Those points are given **once a year**. If the user changes its birthdate after receiving the points, he will not receive again points for birthdate until one year has passed.
- **Registration** – registration is equivalent to a
 - **customer's first scan of their loyalty card QR code on your POS**
 - **first self-checkin at your venue**
 - **Booking a free voucher if the** customer has not visited your venue before.

The points for registrations will be awarded to him in all those cases.

- **Referral** – your customer who gives his referral code to a friend will get points when the friend registers at one of your venues (presents the referral QR code to be scanned). You have the option to give points to the friend, too.

NB! The friend needs to have registered in Loyax first – via the User Portal, the mobile application or via the POS registration.

After scanning his loyalty card the referral QR code can be scanned and processed. If you scan the referral QR code first, you will get a notification that this card is invalid.

Check [HOW 'REFER A FRIEND' WORKS](#)

Rewards

LOYAX All MAX English [Settings]

Edit Campaign Published Anjelica

Details Events **Rewards** Items Vouchers Discounts Cashback

Category: All Name: [Search]

Image	Category	Name	Points	Points + Amount	QTY	Current	#
	Far Eastern Magic	Refreshing Masala T...	1	1 Points + 1 MYR	1	1	[Edit]

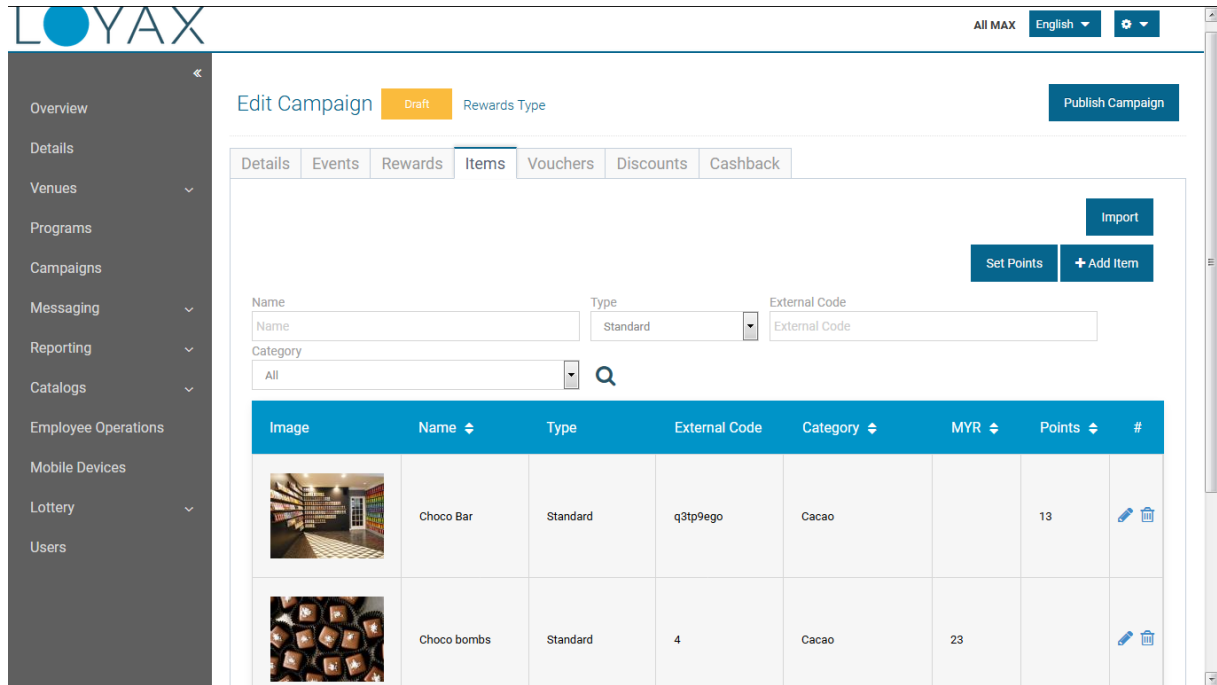
Showing 10 of 1 Entries Page 1 of 1

Powered by LOYAX

Rewards are one of the incentives for your customers to collect points. They can be an item, a service, you name it. Their point value is always an integer.

The rewards are visible in the **User Portal**, in the mobile **Client application** and on the Mobile **POS** application.

Items



This is your product with a set price. The items are listed as products in the Products Catalog.

The items are visible on the **Mobile POS** application. Your employee can input their quantity when a customer is purchasing them.

Vouchers

The screenshot shows the 'Edit Campaign' interface in the Loyax Merchant Portal. The page title is 'Edit Campaign' with a 'Draft' status and 'Rewards Type' label. A 'Publish Campaign' button is visible. The main content area is divided into tabs: Details, Events, Rewards, Items, Vouchers (selected), Discounts, and Cashback. A '+ Add Voucher' button is located in the top right of the main area. Below the tabs is a table with the following columns: Image, Description, Quantity, Current, Type, and #. The table contains one entry: a blue car image, 'BMW new', quantity 2, current 2, and type 'Points'. Below the table, it says 'Showing 10 of 1 Entries' and 'Page 1 of 1'. The footer of the interface says 'Powered by LOYAX'.

Image	Description	Quantity	Current	Type	#
	BMW new	2	2	Points	

Vouchers are a type of rewards that can be used one time only. They can be for a physical reward, a service, a discount percentage (i.e. coupon), cashback. It is up to you to define how they will be used.

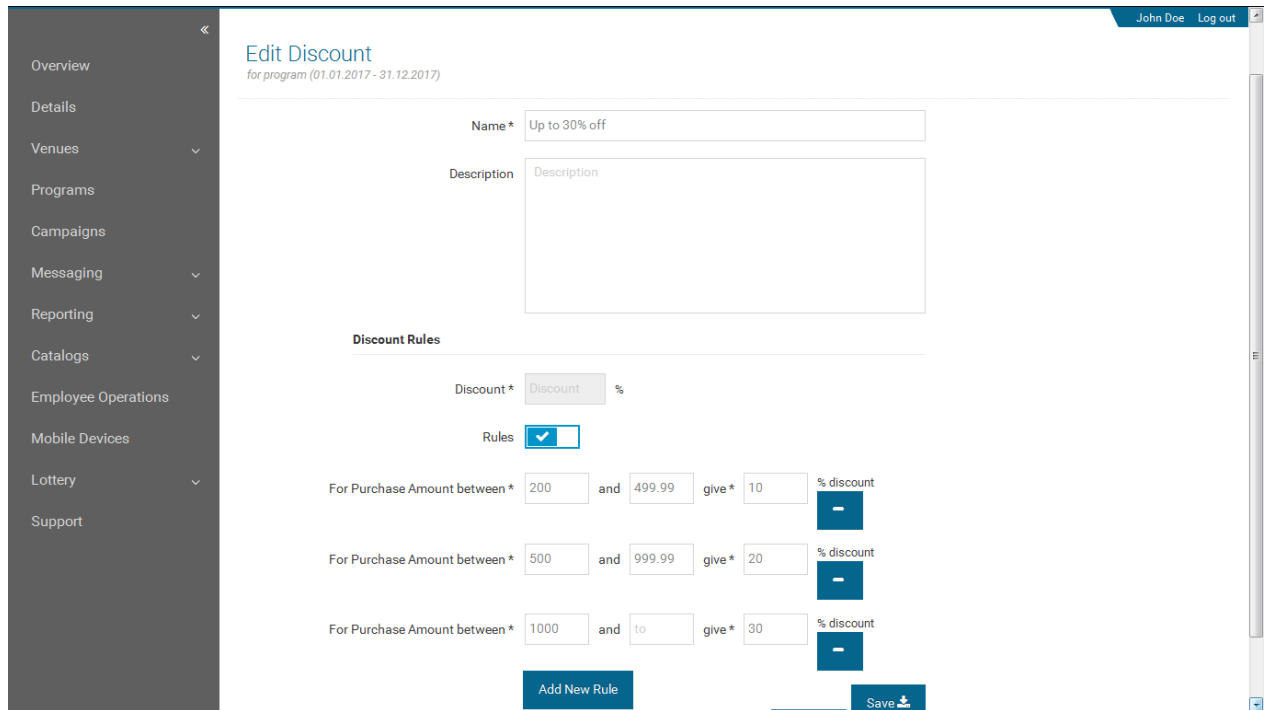
A voucher can be Free, redeemable for Points / Amount / Points+Amount payable at the venue.

The vouchers are visible and can be booked in the **User Portal** and in the **User mobile application**.

The booked vouchers for a customer are visible in the **POS** after scanning the loyalty QR code.

NB! A booked voucher QR code can be given as a present. A voucher can be redeemed by any person who presents it at the venue. It **does not require** a loyalty card to be scanned before its redemption.

Discounts



Discounts can be a general discount applied on purchase of any amount OR tiered discounts based on amounts spent.

Discount Rules

Discount * %

Rules 

The general discount is a percentage deduction from the purchase amount applied on the whole purchase transaction.

Discount Rules

Discount * %

Rules

For Purchase Amount between * and give * % discount

For Purchase Amount between * and give * % discount

For Purchase Amount between * and give * % discount

A tiered discount has rules for applying a percentage discount on purchases within an amount range (From-To). There should not be gaps in the ranges.

For instance, you cannot have

From-To: 200-499.99

From-To: 600-999.99

The proper way to setup a tiered discount it is the following:

Example:

For Purchase Amount between **200** and **500** give 10% discount

For Purchase Amount between **500** and **1000** give 20% discount

For Purchase Amount between **1000** and [**empty** = infinity] give 30% discount

There are empty or overlapping intervals for discount rules.



Discount Rules

Discount * %

Rules

For Purchase Amount between *	<input type="text" value="200"/>	and	<input type="text" value="499.99"/>	give *	<input type="text" value="10"/>	% discount
						<input type="text" value="-"/>
For Purchase Amount between *	<input type="text" value="600"/>	and	<input type="text" value="999.99"/>	give *	<input type="text" value="20"/>	% discount
						<input type="text" value="-"/>
For Purchase Amount between *	<input type="text" value="1000"/>	and	<input type="text" value="to"/>	give *	<input type="text" value="30"/>	% discount
						<input type="text" value="-"/>

NB! The **To** field should remain **empty** on the **bottom row**.

The discounts are visible on the **User Portal**, the **User mobile applications** and on the Mobile **POS** application.

The **discount is marked on the POS** by the employee.

If you have checked the **Calculate points after discount** in the program setting, the points will be calculated after applying the discount at the POS.

Check [HOW DISCOUNT IS APPLIED](#)

Cashback

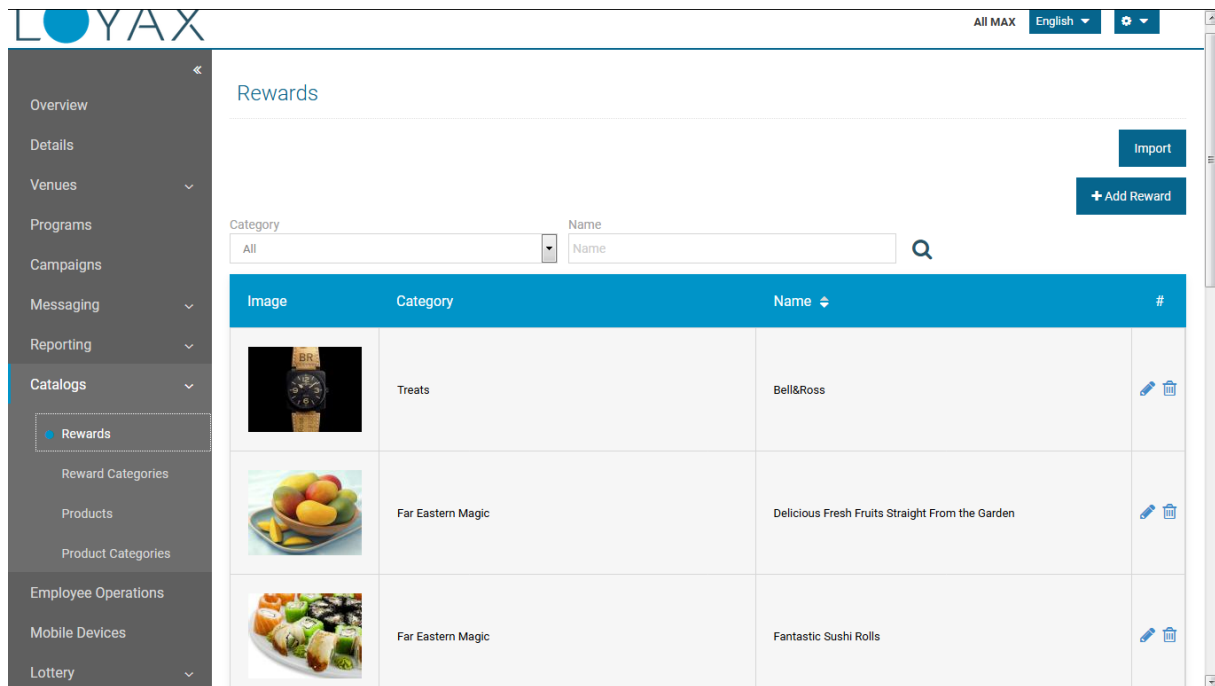
The screenshot shows the 'Edit Program' interface for a Cashback rule. The sidebar on the left contains navigation options: Overview, Details, Venues, Programs, Campaigns, Messaging, Reporting, Catalogs, Employee Operations, Mobile Devices, Lottery, and Support. The top navigation bar includes 'English', 'John Doe', and 'Log out'. The main content area has tabs for 'Details', 'Events', 'Rewards', 'Items', 'Vouchers', 'Discounts', and 'Cashback'. The 'Cashback' tab is active, showing a form for editing a rule named 'Cash2You'. The rule is currently active, with a minimum transaction amount of 300, a percentage of 5, and a validity of 10 days. The form includes 'Cancel' and 'Save' buttons.

Cashback is another incentive for drawing in customers. You will pay back Cash to customers who have accumulated some cashback amount.

Fill in the following fields:

- **Status** - Active or Inactive slider. **Inactive** is red. Active is blue.
- **Name** - the cashback rule name.
- **Minimum Transaction Amount** – cashback will be calculated on a purchase above this amount. If the purchase is below this amount, no cashback will be calculated.
- **Percentage** - the customer can take this percentage from each total purchase amount in cash at the next card scan within the validity days.
- **Valid for (Days)** - If the Valid for (Days) are = 1 and the customer purchases something today at 13:25, he can redeemed the cashback until tomorrow 13:25. If this field is empty, the cashback is valid until the end of the campaign.

Catalogs



The catalogs are a way of organizing your rewards and products by categories.

If you have large inventories, you can **import** rewards and their categories, as well as products and their respective categories. If you want to use this functionality, please contact us for the proper import data format.

You can populate the **Rewards Catalog** and add the **rewards** in your loyalty campaigns OR you can create the rewards in the campaign. The new rewards will automatically appear in the Rewards Catalog.

The **Product Catalog** should be populated when you have an integration between Loyax and your inventory or external POS system. A product with set price is used as an item in a campaign.

Employee Operations

Employee Operations

Show canceled operations

Employee ID: Employee Name: Venue: From: To:

Customer: Activity:

Employee ID	Employee Name	Venue	Date/Time	Customer	Activity
1158		Kuala Pekan Malaysia	27.04.2017 01:51:00	Christopher Robin	Given points: 9
1160	aceR Chris	Kuala Pekan Malaysia	01.03.2017 07:33:02	Christopher Robin	Use Voucher: VCLX39A0... Pellentesque facilisis jus...
1160	aceR Chris	Kuala Pekan Malaysia	01.03.2017 07:32:59	Christopher Robin	Scan Voucher: VCLX39A0... Pellentesque facilisis jus...
1160	aceR Chris	Kuala Pekan Malaysia	01.03.2017 07:31:12	Christopher Robin	Use Voucher: VCLX7155A... Lorem ipsum dolor sit am...
1160	aceR Chris	Kuala Pekan Malaysia	01.03.2017 07:31:08	Christopher Robin	Scan Voucher: VCLX7155... Lorem ipsum dolor sit am...
1160	aceR Chris	Kuala Pekan Malaysia	01.03.2017 07:30:19	Christopher Robin	Use Voucher: VCLX55EEA... Donec pretium suscipit c...
1160	aceR Chris	Kuala Pekan Malaysia	01.03.2017 07:30:16	Christopher Robin	Scan Voucher: VCLX55EE... Donec pretium suscipit c...
1160	aceR Chris	Kuala Pekan Malaysia	01.03.2017 07:25:52	Christopher Robin	Use Voucher: VCLX60003... 324 Lorem ipsum dolor si...

This is the place where you can audit all **employee operations** performed on mobile or web **POS**.

Show canceled operations checkbox above the list shows all canceled or edited operations **in red**. The new (or updated) operation is displayed as a regular activity row.

When you **click on a row** in the table, different **buttons appear** depending on the activity type of the selected row.

- When **Add Points** operation row is selected, buttons appear
 - **Edit Transaction** –change the amount of points given to the customer. It cannot be zero or empty.
 - **Disable Transaction** –cancel the points given to the customer
 - **Send Message** – send a message only to the selected customer

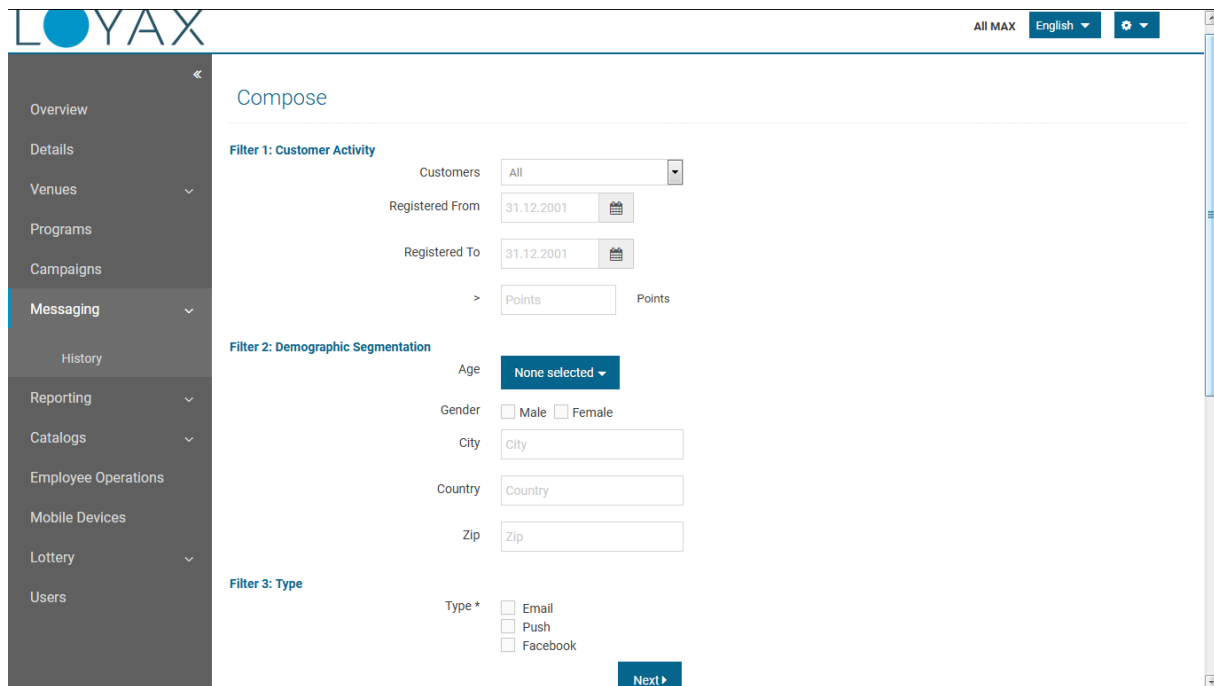
When a row of all other operations is selected, **Send Message** button appears. With this button you can **send Email, Push or Facebook** message **to the selected customer only**.

The **activity** you can search by is listed here:

- **All** – show all operations
- **Create an Account** – show only operations for creating a new customer account at POS
- **Update an Account** – show only operations for editing a customer account at POS
- **Register a Card** – show only registrations of new loyalty cards at POS. They can be with or without registering the customer

- **Scan a Card** – show scanning of a customer loyalty QR code at POS
- **Add Points** – show adding points to a customer balance from POS (when purchasing items or by manual input of purchase amount). Click on a row to revert a transaction
- **Give a Reward** – show rewards given to a customer from POS. The customer had the required number of points for the reward at the time of redemption
- **Revert Transaction** – show transactions reverted by you
- **Added Discount** – show discounts redeemed at POS
- **Use Voucher** – show vouchers redeemed at POS
- **Scan Voucher** – show when a voucher was scanned at POS.
- **Give Cashback** – shows cashback given by you to a customer
- **Take Cashback** – show cashback that was redeemed by your customers
- **Registration** – shows only published campaign Event Registration – first visit at a venue
- **Visit** – show only published campaign Event Visit – each loyalty card QR code scan at a venue’s POS or self check-in scan of the venue visit QR code
- **Birthdate** – show points given for birthdate event. They are given once a year. If the customer changes their birthdate after receiving the points, they he will not receive again points for birthdate until one year has passed
- **Points for Referrals** – points given to a customer when their referral code has been used by their friend
- **Points for Referent** – points given to the friend for registering and presenting a referral code

Messaging



In **Messaging** screen you can send messages to all customers who have not unsubscribed from receiving messages.

You can send messages to all clients or to a selected group of clients.

You can filter clients by the following criteria:

- **Filter 1: Customer Activity**

- **Customers:**
 - **All** – all active and inactive customers will be selected to receive a message
 - **Active** – all users who have at least one transaction (a visit, purchase, booked free voucher, etc)
 - **No activity** – all registered customers without a transaction
- **Registered From** – all customers who are registered since this date, including
- **Registered To** – all customers who are registered up to this date, excluding
- **Active From** – all customers with a transaction from this date, including
- **Active To** – all customers with a transaction to this date, including
- **No Activity From** – all customers without a transaction from this date, including
- **No Activity To** – all customers without a transaction to this date, including
- **Collected Points > than** – all clients whose balance is higher than the number of points you set at the moment. For example, if you type 100, only customers with more than 100 points will receive the message. These criteria can be combined with

the above **Active From-To** selection or **All**, or **Active** from the **Customers** dropdown

- **Filter 2: Demographic Segmentation** – filter by the following criteria:
 - **Age** – select one or more age groups
 - **Gender** – select a gender for filtering by placing a tick in a checkbox
 - **City** – type in the name of the city whose residents you wish to target
 - **Country** – type the district in which the customers are registered
 - **ZIP** – type in the ZIP code of the customers you wish to target
- **Filter 3: Type** – you can send one, two or all types of messages
 - **Email** – all customers can receive a message
 - **Push** – only customers who are logged in the Mobile applications can receive a message. The message appears first as application update messages in the upper left corner of Android phones. After clicking on it, it is opened in the user mobile application.
 - **Facebook** – only users who have registered with Facebook can receive messages. The messages are visible only in the desktop browser. They are not visible in the Facebook mobile application and in a mobile browser.
- **Next** button – opens **Send Message** screen. Enter your text in the respective fields.

Messaging History

History

Period Type

Date	Type	Text	Sent	Failed
19.04.2017 15:53:47	Push	Green beetle	3	0
19.04.2017 15:52:56	Email	SPA	1	0
19.04.2017 15:52:56	Push	SPA	3	0
19.04.2017 15:51:55	Push	Fireflies	3	0
08.03.2017 10:44:59	Push	test for winnie	6	0

Showing 10 of 5 Entries Page 1 of 1

Powered by LOYAX

Here you can view all **messages** sent up to this moment with information in the following columns:

- **Date** – the date and time on which the message was sent
- **Type** – the type of the message – email, push or Facebook
- **Text** – the body text of the sent message
- **Sent** – the number of customers who received the message successfully
- **Failed** – the number of customers who failed to receive the message

Above the sent messages list are the **Range** filters with which you can search and filter the information:

- **From** – the start date of the period in which messages were sent, including
- **To** – the end date of the period in which the messages were sent, including
- **Type** – a dropdown menu to filter by message type. You can choose one or more message types by placing ticks in the boxes

Lottery

Here you can create **lotteries** / raffles for your customers.



When drawing a lottery, the winners are randomly selected among your customers.

You can filter the participants in the **lottery** based on their activity. You can also list the lottery rewards. There can be only one active (saved) **lottery** for a period of time.

The screenshot displays the 'Lottery' creation page in the Loyax Merchant Portal. The page title is 'Lottery'. The form includes the following fields and options:

- Name ***: Text input field containing 'Jay'.
- All Active Users**: A checked checkbox.
- Active From**: Date picker set to 31.12.2001.
- Active To**: Date picker set to 31.12.2001.
- Points**: A field with a greater-than sign (>) and a value of 0. A note below it says 'Current Points Balance is More than'.

Below the form, there are two buttons: 'New Lottery' and 'Save Lottery'. A status indicator shows 'Total Participants: 3'. A table of rewards is displayed below:

Name	Quantity	#
Silver spoon	5	 

At the bottom right of the table, there are two buttons: 'Add a Reward +' and 'Draw Lottery'. The footer of the page indicates 'Powered by LOYAX'.

To create a new lottery fill in the following fields:

- **Name** – the lottery name
- **All active users** – the lottery participants will be all active users **during the currently active Program** (who have at least one transaction – received points or booked a free voucher).
NB! Users who have not confirmed their email and have not filled in their phone number would not be included in the pool.
- **Active from** – starting date of user activity (transactions) **during the currently active Program**
- **Active to** – end date of user activity (transactions) **during the currently active Program**
- **Points >** – the lottery participant's **total collected points during the currently active Program** are more than the set amount at the time of drawing the lottery. These are all collected points without subtracting redemptions

After filling in all information about the lottery, click the **Save Lottery** button.

When a lottery is saved it means all the populated fields keep the data until the lottery is drawn or a new one is created.

Below the **lottery** information fields two buttons appear – **Add a Reward** and **Draw Lottery**.

To add a new reward to the **lottery**, press the **Add a Reward** button. It opens the Add Reward screen.

Fill in the following fields:

- **Name** – reward name.
- **Quantity** – available quantity of the reward for the next drawing of the lottery. The total number of rewards should be less than the participants.
- **Add+** button – saves the reward.
- **Back** button – goes back to previous screen without saving the new reward.

The Rewards table lists the rewards available for the next drawing of the lottery. Its columns are:

- **Name** – the reward name.
- **Quantity** – quantity of this reward available for the next drawing of the lottery. The total number of rewards should be less than the participants.
- **Edit** button – edit the reward details.
- **Delete** button – delete the reward.

You need to set **rewards** before you can draw the lottery.

The number of rewards should be less than the participants.

REPORTING

Overview

All data displayed in the Overview is since the setup of your loyalty platform.

Total Users are all users who have a visit in at least one of your venues – their QR code was scanned on the venue POS.

All reports can be **filtered** by selected criteria (time period, program, name, etc.) and can be **exported in Excel**.

Customers

Customer List

The total number of customers includes those who have a visit at your venue, have self checked-in or have booked a free / paid voucher.

The **Customer List** can be filtered by

- **Status**
 - **All** – all registered at your business in the selected period
 - **Active** – has a transaction in the selected period
 - **Inactive** – has no transaction in the selected period
- **Period**
- **Name**
- **Email**

When you **click on the customer's name**, their **Customer Profiles** are opened. You can check their

- **Details**
- **Current points**
- **Loyalty program activity**
- **Deactivate their loyalty card**
- **Add a new physical card** – the code is generated by your Superadmin at request

EXAMPLES

How 'Refer a Friend' works

1. Add 'Refer a Friend' event in one of your campaigns
2. Publish the campaign
3. The customer needs to have a transaction at your venue
4. The customer sends the Referral QR code to a friend (via email or printed)
5. The friend registers in Loyax
6. The friend visits your venue and you scan their loyalty card QR code
7. You scan the Referral QR code
8. Your customer gets the points set in the campaign event
9. The friend gets the points set in the campaign event (can be 0)

Which image is shown on the mobile application Places screen

1. Program image, if uploaded
2. Venue image, if uploaded
3. Default venue image

How Discount is applied

You have just set the following tiered discount in one of your published campaigns

- For Purchase Amount between **200** and **500** give 10% discount
- For Purchase Amount between **500** and **1000** give 20% discount
- For Purchase Amount between **1000** and [**empty** = infinity] give 30% discount

Your employee types the purchase amount 300 on POS. A popup dialog appears with a row of 10% discount available for this customer. The employee taps on the row to select the 10% discount and taps **OK** button.

If your loyalty program has checked **Calculate Points on Discounted Sum**, the customer would get points on 300-10% discount which is 270.

If it is not checked, the points will be calculated on amount 300.

How Cashback works

You have set 3% cashback in one of your published campaigns

Your employee registers a customer purchase of 50. They automatically are entitled to cashback amount of 1.5. On the next loyalty card QR scan the customer can receive 1.5 in cash.

The cashback can be redeemed before the **Valid for (days)** have passed.

If **Valid for (days)** is empty, the cashback can be redeemed before the end of the campaign.


How to change a Reward price in my running campaign

This is the Reward in my current campaign that I wish to edit.

View Reward
for campaign (25.04.2017 - 31.12.2017)

Category * Far Eastern Magic

Name * Refreshing Masala Tea



Quantity * 1

Points

Points * 1

[← Back](#) [Save](#)

1. Create a new campaign with the same From – To dates
2. Set its **Initial Priority** to **Highest**
3. Add reward Refreshing Masala Tea in the new campaign
4. Set its Points to be 5 instead of 1
5. Save the reward
6. Publish the campaign
7. Now your Refreshing Masala Tea can be redeemed for 5 points at your POS

How to add a new reward to my running campaign

1. Create a new campaign with the same From – To dates
2. Set its **Initial Priority** to **Lowest**
3. Add your new Reward
4. Publish the campaign

5. Now your customers can be redeemed this reward at your POS

How to change the Cashback percentage in my running campaign

1. Create a new campaign with the same From – To dates
2. Set its **Initial Priority** to **Highest**
3. Add the desired Cashback % in the new campaign
4. Save the cashback
5. Publish the campaign
6. Now your customers will get the new Cashback % at your POS

How Discounts work in simultaneous campaigns

The discounts in the Highest priority campaign does not override the discounts in the campaigns below it.

Discounts from **all published campaigns** for a venue **are displayed** in the User Portal and in the user mobile applications.

It is up to your employee to choose which discount to be applied on POS.

Let's say you have one published campaign with a flat Discount rate of **4%** and another published campaign with tiered discount rates like this:

- For Purchase Amount between **200** and **500** give **10%** discount
- For Purchase Amount between **500** and **1000** give **20%** discount
- For Purchase Amount between **1000** and [**empty** = infinity] give **30%** discount

When a customer makes a purchase for **350** the following discounts will be available to them on the POS:

- **4%**
- **10%**

Your employee can choose which one to apply.

How Vouchers work in simultaneous campaigns

The Vouchers in the Highest priority campaign do not override vouchers in the campaigns below it.

Vouchers from **all published campaigns** for a venue **are displayed** in the User Portal and in the user mobile applications.

The customers can book vouchers from all published campaigns.

How to add a new event in my running campaign

1. Create a new campaign with the same From – To dates
2. Set its **Initial Priority** to **Lowest**
3. Add your new Event
4. Publish the campaign
5. The new event is applied along with all previous events

How to change the Registration event points in my running campaign

1. Create a new campaign with the same From – To dates
2. Set its **Initial Priority** to **Highest**
3. Add event Registration
4. Set its points to the new value
5. Save the event
6. Publish the campaign
7. Now your customers will get the Registration points from this campaign

How to zero the customer's points

Cancel your running loyalty Program.

Hint: if you extend the Program's end date, your customers will get their points back. If you start a new program, your customers will start collecting points from zero.

How to delete a venue

A venue cannot be deleted. You can disable it or edit it.

How to register a mobile device/POS

1. Download the POS application from the app store. Open it.
2. Give this device a unique name.
3. Login with your merchant username and password for logging in the Merchant Portal.
4. Now your employees can start using it at your venues by logging in and out

GLOSSARY

Term	Description
Active User	This is a customer who has at least one transaction at your venue.
Campaign	<p>A Campaign is used to manage rewards, vouchers, items, events, discounts, cashback.</p> <p>A campaign is always linked to a program. You need to have a program before creating a campaign. All campaigns end when the program expires or is canceled.</p> <p>There can be several published campaigns in one and the same period of time. The simultaneously running campaigns are complementary. This means that you can only add new elements to the published campaign elements.</p>
Cashback	Customers receive a percentage of each purchase amount as a cash refund.
Catalog	<p>The catalogs are a way of organizing your rewards and products by categories.</p> <p>If you have large inventories, you can import rewards and their categories, as well as products and their categories in the respective catalog.</p> <p>When you create a reward in a campaign it is automatically added in the Rewards Catalog.</p> <p>The Product Catalog is used when integrating Loyax with your inventory or external POS system.</p>
Discount	Discount is applied on the total amount of the purchase on POS.
Employee	This is an individual who works on the POS at your venue. They have a username and password for authentication.
Inactive User	This is a customer who has registered in the system but has no transaction at your venue.
Item	This is your product with a price. The items are listed as products in the Products Catalog.

Lottery	This is a raffle in which a number of customers participate with their transactions for one or more chances to win a prize.
Loyalty Card	<p>This is a unique QR code assigned to a customer. The code can be printed on a physical card and given out at your venues. In the user mobile applications this can be opened by clicking on the QR code icon in the upper right corner of the screen.</p> <p>A customer can have more than one loyalty cards. A loyalty card can be deleted from the customer details by the customer and by you.</p>
Loyalty Points	Loyalty points are the main 'currency' of the loyalty program and campaigns. Points are collected by your customers based on rules and events set in the loyalty program and campaigns. The awarded points are always an integer and are rounded up for values equal and above 0.50 or down for values below 0.50.
POS device	An Andoid or iOS tablet with installed Loyax POS application. The POS is used for registering customer transactions.
Program	The loyalty program manages the points collecting rules and the 'life' of loyalty points. When a program ends, the loyalty points are zeroed.
Reward	This is the incentive for your customers to collect and redeem points.
Transaction	<p>This is an interaction between the customer and your business.</p> <p>At POS it is: card scan, registering a purchase, redeeming a reward, voucher or cashback, registering with Refer a Friend code.</p> <p>At the user mobile application it is: booking a voucher, self check-in.</p> <p>Automatic events, if set in a published campaign: registration, visit, birthdate, referral.</p>
User Registration	<p>The user can self-register in the system on the mobile application or on the web User Portal.</p> <p>A user registers at each merchant with the first transaction at their venue. An employee can register a user (customer) on POS when you are giving out printed cards.</p>
Venue	A venue is the place where your customers come to shop, to collect points and to redeem rewards, vouchers and discounts. You can have numerous venues.
Venue Group	You can organize several of your venues in a Venue group for easier management of campaigns. A group can have one or more venues.

<p>Visit</p>	<p>A visit is registered when a customer’s loyalty card is scanned at POS.</p> <p>A self check-in visit is registered from the user mobile application when a customer scans the venue’s ‘Visit QR code’.</p> <p>The next visit can be registered after the ‘Time between Visits’ set in the campaign Visit event.</p>
<p>Voucher</p>	<p>A booked voucher is a unique QR code which entitles the holder to exchange it for goods, services or discount stated in its description. It can be given as a gift or used by the customer who booked it. Voucher can be paid (in points and/or money) or free.</p> <p>The voucher can be redeemed before its expiration date</p>