

MenuMate Loyalty
6 Steps to Customer
Loyalty

Introduction

International statistics report that a card carrying loyalty member will visit their favourite business **FOUR TIMES** more often and spend **50% MORE** than a normal casual customer.

With statics like that representing thousands of dollars of customer spend, running a loyalty rewards system in your business is very important.

Menumate Loyalty provides a huge amount of features that a hospitality business can use to create their own fanatical fan base.

While this document does not specifically talk about Twitter and Facebook these are two areas that every hospitality business should also be using in conjunction with their Menumate Point of Sale and Loyalty system to communicate with their fans.

Copyright

Copyright 2011 Menumate Limited
All rights reserved

No part of the document and publication may be reproduced, stored in or introduced into a retrieval system, or transmitted, in any form, or by any means (electronic, mechanical, photocopying, recording, or otherwise), without the prior permission of the managing director of Menumate Limited. Requests for permission should be directed to sales@menumate.com or mailed to Menumate Limited, P O Box 33225, Christchurch 8023, New Zealand

How to Use this Training Guide

This training guide is designed to provide you with ideas on how the Menumate loyalty system works and as a step by step guide to building your own loyalty system.

Contents

Introduction	2
Copyright.....	2
How to Use this Training Guide	2
Step 1 – Get Organised to Launch a Loyalty System.....	5
Preparation	6
Will You Charge a Member to Join?.....	6
What Loyalty % Will You Offer Your Members?	6
Design a Membership Form.....	7
Sample Membership Form.....	7
Design a Loyalty Card.....	8
Sample Loyalty Cards	8
Step 2 – Building the Membership Database	9
Entering Members into Menumate POS.....	10
Date of Birth is Important!.....	13
Allocating a Loyalty Card.....	14
Test for Success.....	15
Step 3 – Loyalty Rewards 101	16
Loyalty Points.....	17
Configuring Loyalty Points in the Menu Editor	17
How Members EARN Loyalty Points at POS.....	19
Touch Point #1	19
How Members SPEND Points at POS	21
Touch Point #2	21
Members should be Encouraged to Top Up their Balance	23
Congratulations It Is Your Birthday	24
Touch Point #3	24
Thank You for Visiting Us	25
Touch Point #4	25
Give Your Staff all the Information Needed.....	26
Touch Point #5	26
Check the Settings for Loyalty Rewards 101.....	28
Step 4 –Loyalty Rewards 201	29

Members Only Happy Hours.....	31
Exclude Members from Holiday Surcharges	32
Lucky Member Draws	33
Touch Point #6	33
Lucky Member Draw Settings	34
10 th Product Free (Per Member).....	35
Configuring Free Product in the Menu Editor (Per Member)	35
Touch Point #7	36
Configuring Free Product in the Point of Sale (Per Member)	37
10 th Product Free (All Sales).....	38
Configuring Free Product in the Menu Editor (All Sales)	38
Touch Point #8	39
Configuring Free Product in the Point of Sale (All Sales)	40
Important Not on Free Product Counts	40
Step 5 – Not All Members are Created Equal	41
Gold Membership Discount	43
Personalising How Loyalty Points Work for Individual Members.....	44
Step 6 – Communication to Your Fans.....	45
Exporting Member Details to Excel.....	46
Touch Point #9	46
Happy Birthday! Here is a Free Meal Voucher	47
Touch Point #10	47

Step 1 – Get Organised to Launch a Loyalty System

Step 1 – Get Organised to Launch a Loyalty System

Preparation

Before launching your loyalty system it is very important to have a basic understanding of what you will be offering your loyalty customers and how you will gather the information. The main reason for this is that you need to have this basic data on your application form that members will fill out.

The most important TWO points you need to consider and decide on are

1. Will you charge a Member to Join and if so How Much?
2. What loyalty % will you be offering your members?

Will You Charge a Member to Join?

There are two trains of thought to this question. A loyalty card will cost your business between \$1.50 and \$2.50 so you don't want to throw them away. Many businesses will charge a fee from \$5.00 to \$20.00 and then load a credit balance onto the loyalty card for the same amount. This ensures that the member (a) starts with a balance and gets used to earning and spending loyalty points (b) sorts out the people that just collect loyalty cards as they are free and never use them at your site.

What Loyalty % Will You Offer Your Members?

There is really no right or wrong answer to this question but there are some historical standards that have been used.

The coffee/café industry will typically offer 10% loyalty on all coffee and tea purchases (equivalent to every 10th Coffee free) and some bars may offer 3% on all purchases and restaurants have offered anywhere from 3% to 10%.

The important thing to realise is that the loyalty is only spent when the member accumulates enough to make a purchase with their points, so typically 10 to 20 visits, and that you can have different percentage of loyalty points on every product.

It may be useful on the application form to just mention that members can earn loyalty rewards up to 10% of their purchase.

Design a Membership Form

Menumate has found that the best way of capturing accurate data when building a loyalty fan base is to get them to complete a Membership Form.

This ensures that;

- The data entered into your system is typically of a higher quality as you are not rushing to enter it while there is a queue of customers.
- If the data is not complete you can call the client to get more information e.g. Email Address, Date of Birth etc

Sample Membership Form

Join our Fan Club and Earn Loyalty Rewards



Name _____

Address _____

Cell Phone _____

Email _____ @ _____

Birth Day _____ / _____
Day Month

We will only use the information provided to send you news on what is happening at our café's and to send you loyalty rewards. You information will not be provided to any third party company. You will earn loyalty rewards on all participating products.

Design a Loyalty Card

Today's technology means you can print almost anything on a loyalty card. These cards are YOUR BRAND and as such you should get a design that fits into your brand. Something that your fan base will see value in and be proud to carry.

Menumate can provide a full design and print program for your loyalty cards.

Sample Loyalty Cards



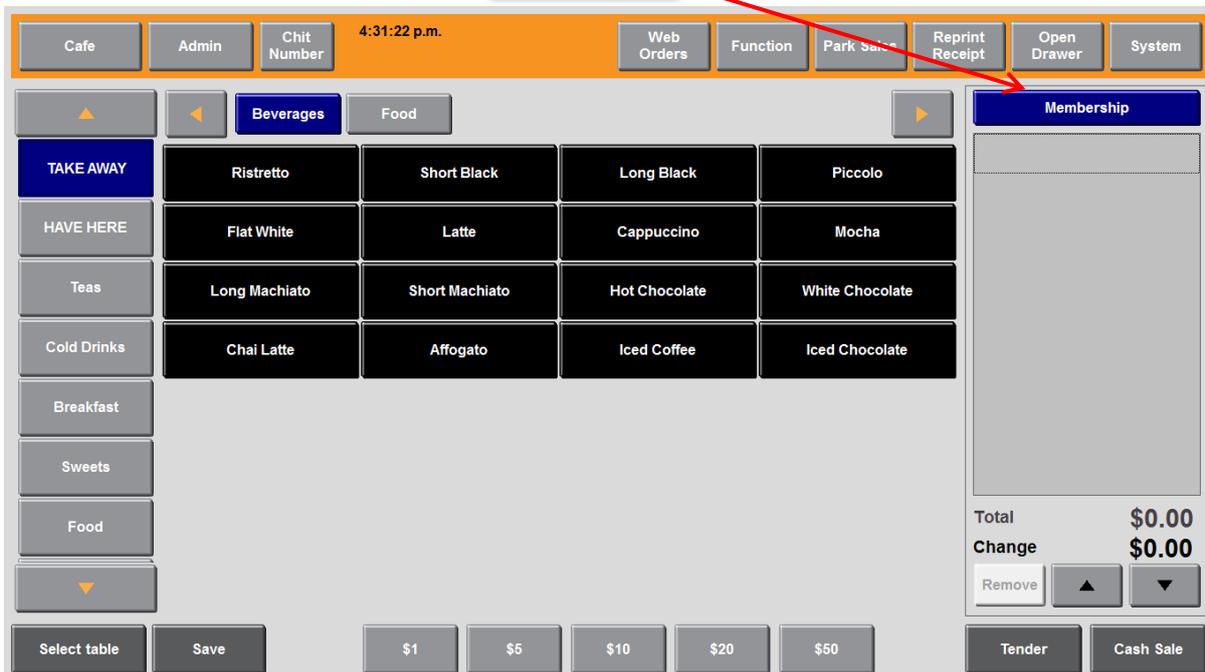
Step 2 – Building the Membership Database

Step 2 – Building the Membership Database

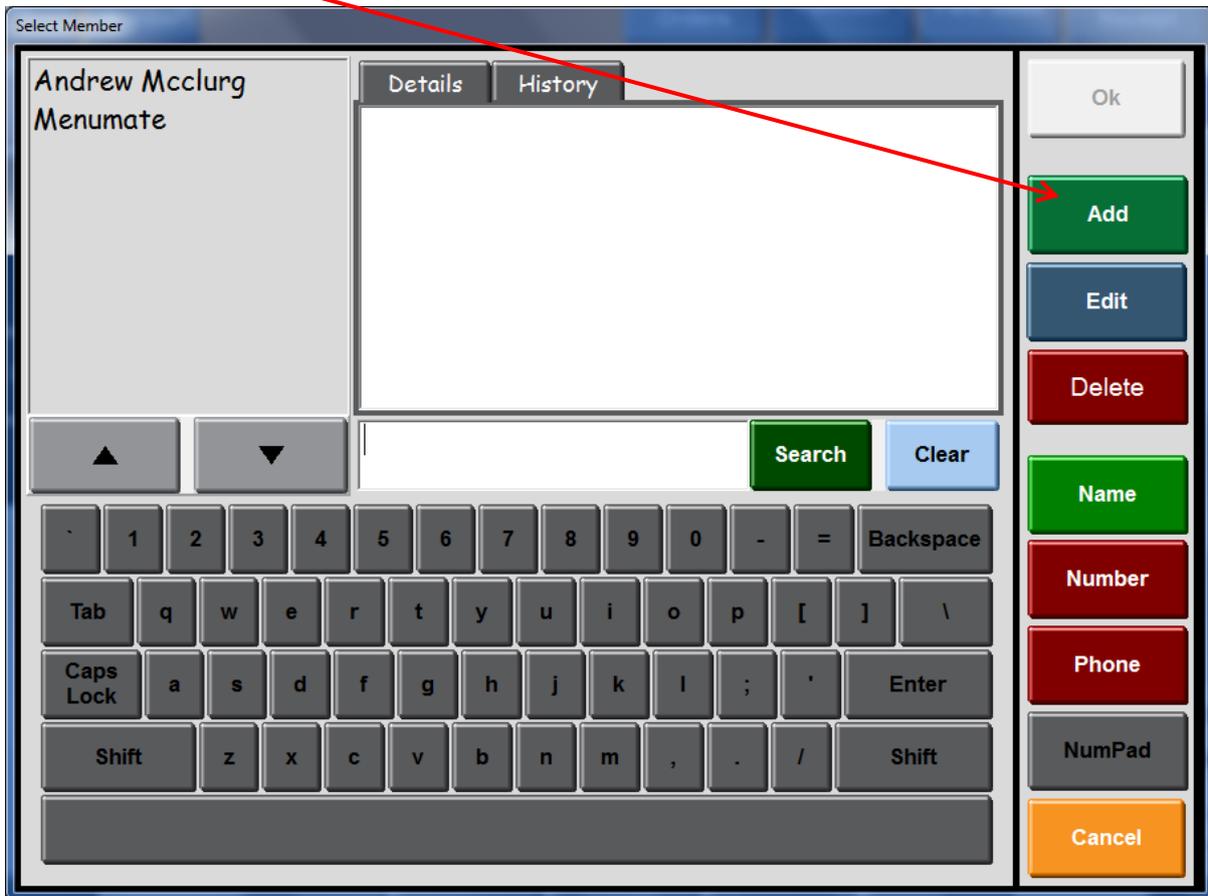
Entering Members into Menumate POS

It is recommended that you setup all your members in Menumate Point of Sale module. If you have an office computer and would like to setup the members in your office using Menumate Point of Sale then contact sales@menumate.com and a Menumate POS License will be provided at no charge. You may also wish to purchase a card reader for your office computer to allocate the loyalty cards to the members rather than taking them to the POS terminal. Once again contact sales@menumate.com for this item. (The price of the reader depends on the model required)

To setup a Member in POS select the **Membership** button.



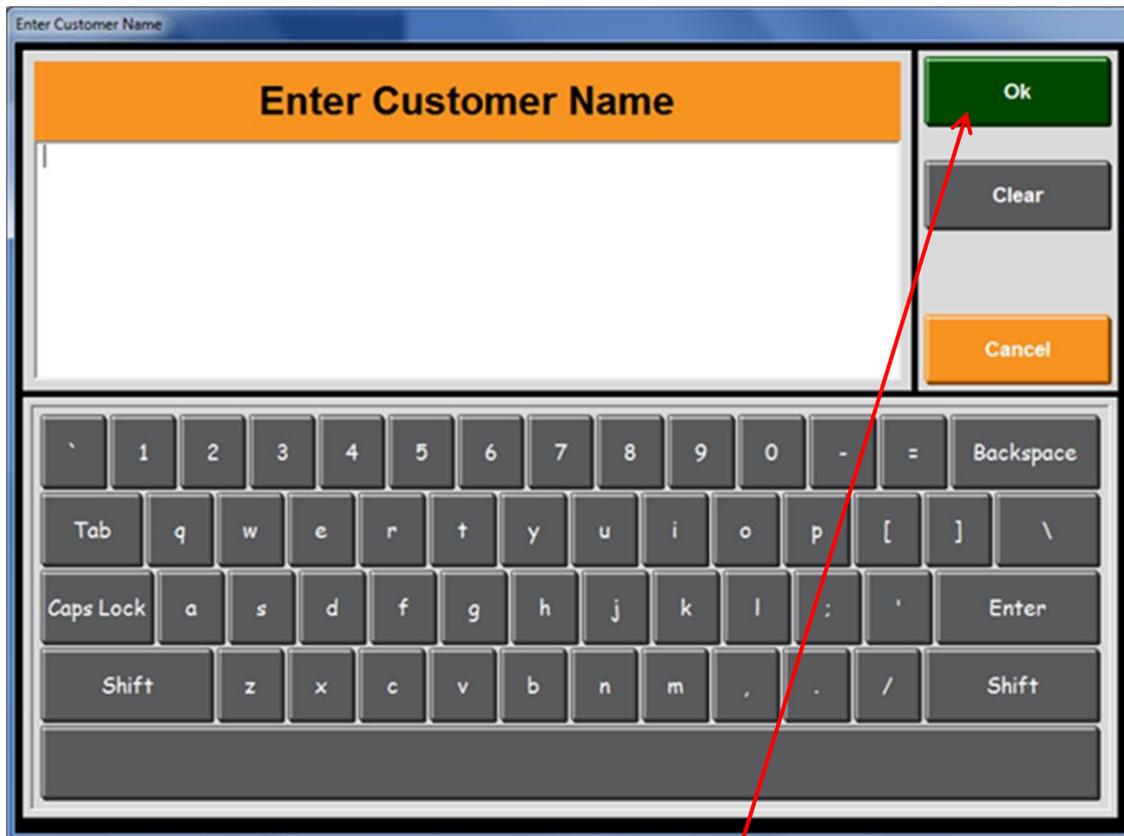
Press **Add** to create a new Member.



After asking you for your security PIN number and username, to ensure you have authority to setup members, you will enter the Membership Maintenance screen.

Select **EDIT** and then **EDIT ALL**

You will then be able to work through each of the membership fields and enter the required information. The first field you need to enter is the Customer Name.



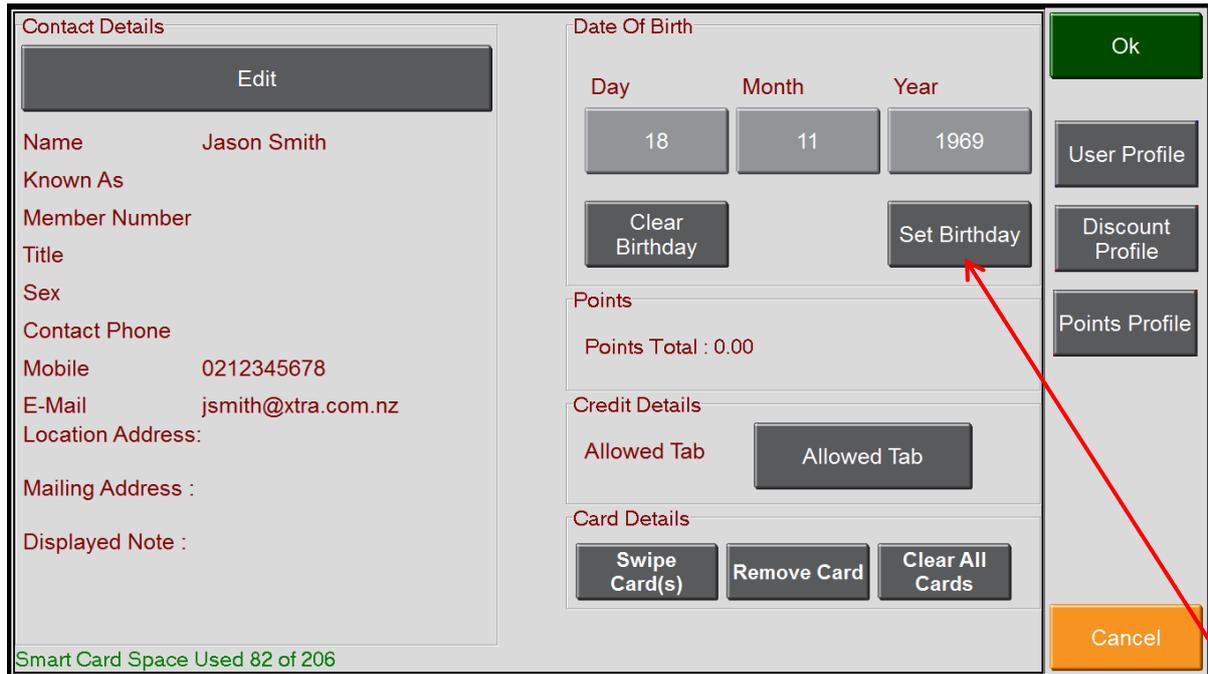
Once you have entered the Customer Name click on **Ok** and you will move through the various fields. While all the fields are important and the more information you gather the better your fan database will end up, the following fields are critical and probably should be considered mandatory.

- Customer Name
- Mobile Phone Number
- Email Address
- Date of Birth

Sometimes the DISPLAY NOTES field which appears on the POS below the members name is used to hold the members favourite Drink (Long Black) or maybe their favourite Sport (Golf) etc. It provides something to allow the POS operator to interact with the member when ordering.

Date of Birth is Important!

Once you have entered all the standard membership information and assuming you have got the members dates of birth. Note: The minimum Menumate needs is DAY and MONTH. Once we have this information the POS system can display that it is a members Birthday. You can also use various Menumate Office functions to send cards or vouchers to Members who have a birthday in October for example.



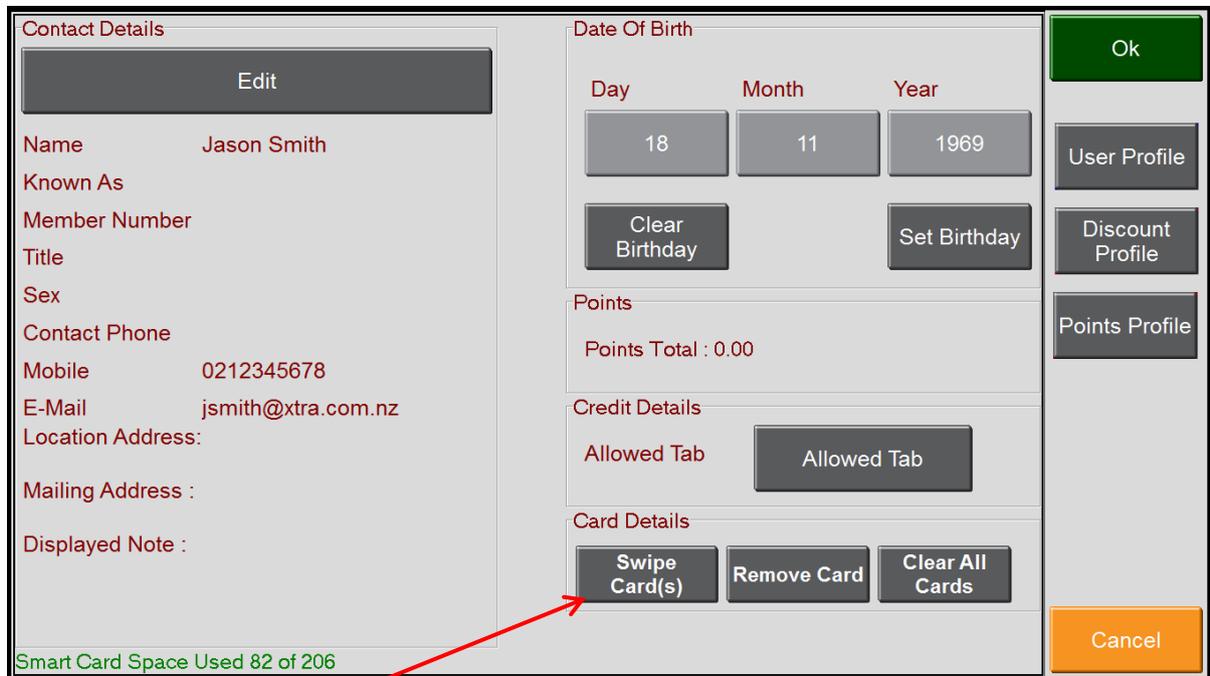
The screenshot shows a member profile form with the following sections:

- Contact Details:** Includes an 'Edit' button and fields for Name (Jason Smith), Known As, Member Number, Title, Sex, Contact Phone, Mobile (0212345678), E-Mail (jsmith@xtra.com.nz), Location Address, Mailing Address, and Displayed Note. A status bar at the bottom left indicates 'Smart Card Space Used 82 of 206'.
- Date Of Birth:** Features three input fields for Day (18), Month (11), and Year (1969). Below these are 'Clear Birthday' and 'Set Birthday' buttons. A red arrow points to the 'Set Birthday' button.
- Points:** Shows 'Points Total : 0.00'.
- Credit Details:** Includes an 'Allowed Tab' button.
- Card Details:** Includes 'Swipe Card(s)', 'Remove Card', and 'Clear All Cards' buttons.
- Navigation:** A vertical sidebar on the right contains 'Ok' (green), 'User Profile', 'Discount Profile', 'Points Profile', and 'Cancel' (orange) buttons.

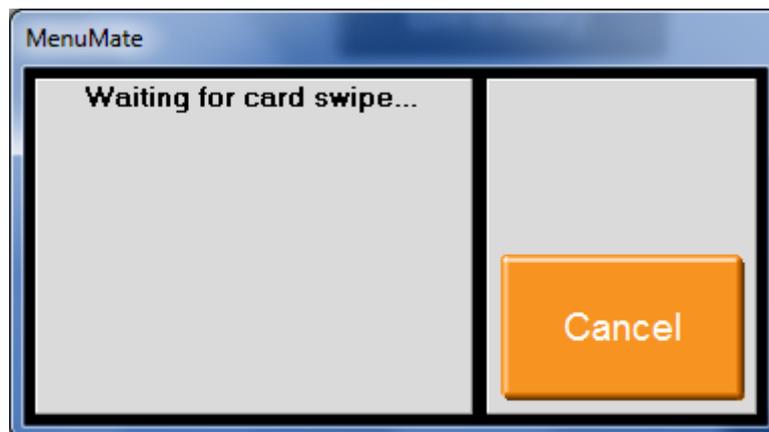
Enter the members DAY, MONTH and YEAR (if provided) for their birthday and then click on **Set Birthday**

Allocating a Loyalty Card

Each loyalty card will have a unique number that will be used by Menumate Point of Sale to find the member quickly in the membership database. Each members needs to have a loyalty card allocated to them.



Click on  to bring up the Swipe Cards dialog box.

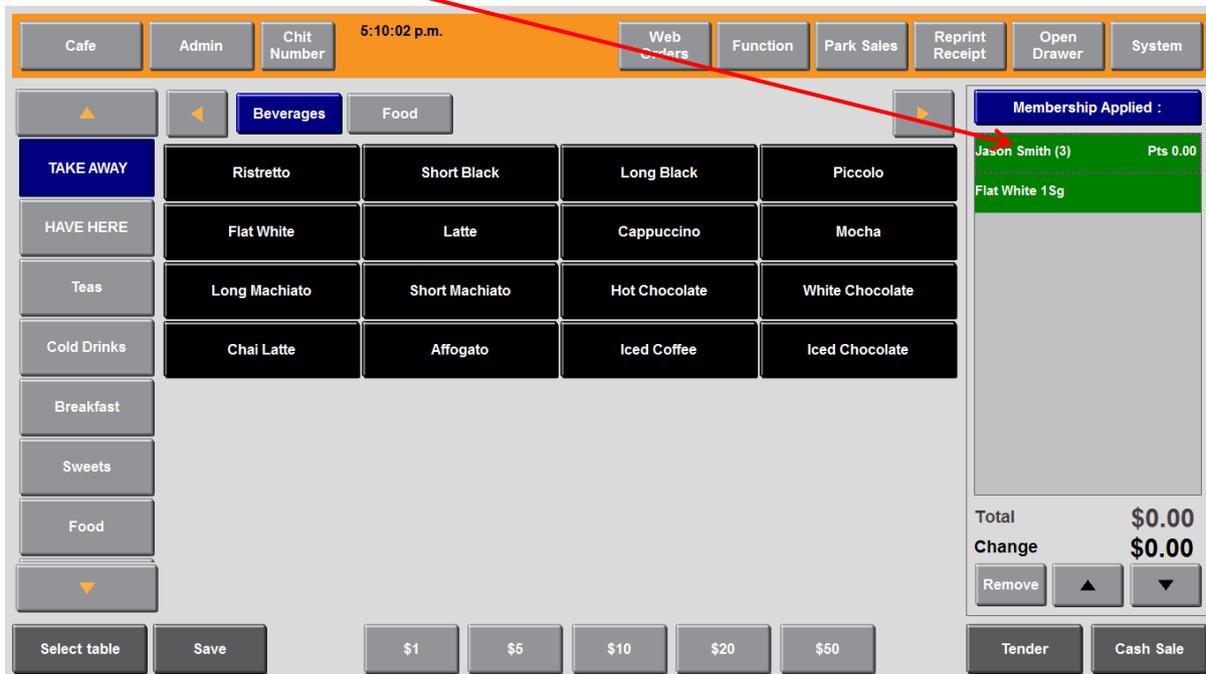


Once you swipe the membership card this dialog box will disappear and the card will be allocated to the Member.

The member is now part of your Fan Database so you can click on  and the member is saved.

Test for Success

Once you have setup your FIRST fan into your database try testing the card at the Point of Sale terminal. From the main point of sale screen swipe the member's loyalty card. Their details should appear on the screen.



If you have a Display Note setup for the member it will also show this information below the Members Name as well as the member's current loyalty balance.

Step 3 – Loyalty Rewards 101

Step 3 –Loyalty Rewards 101

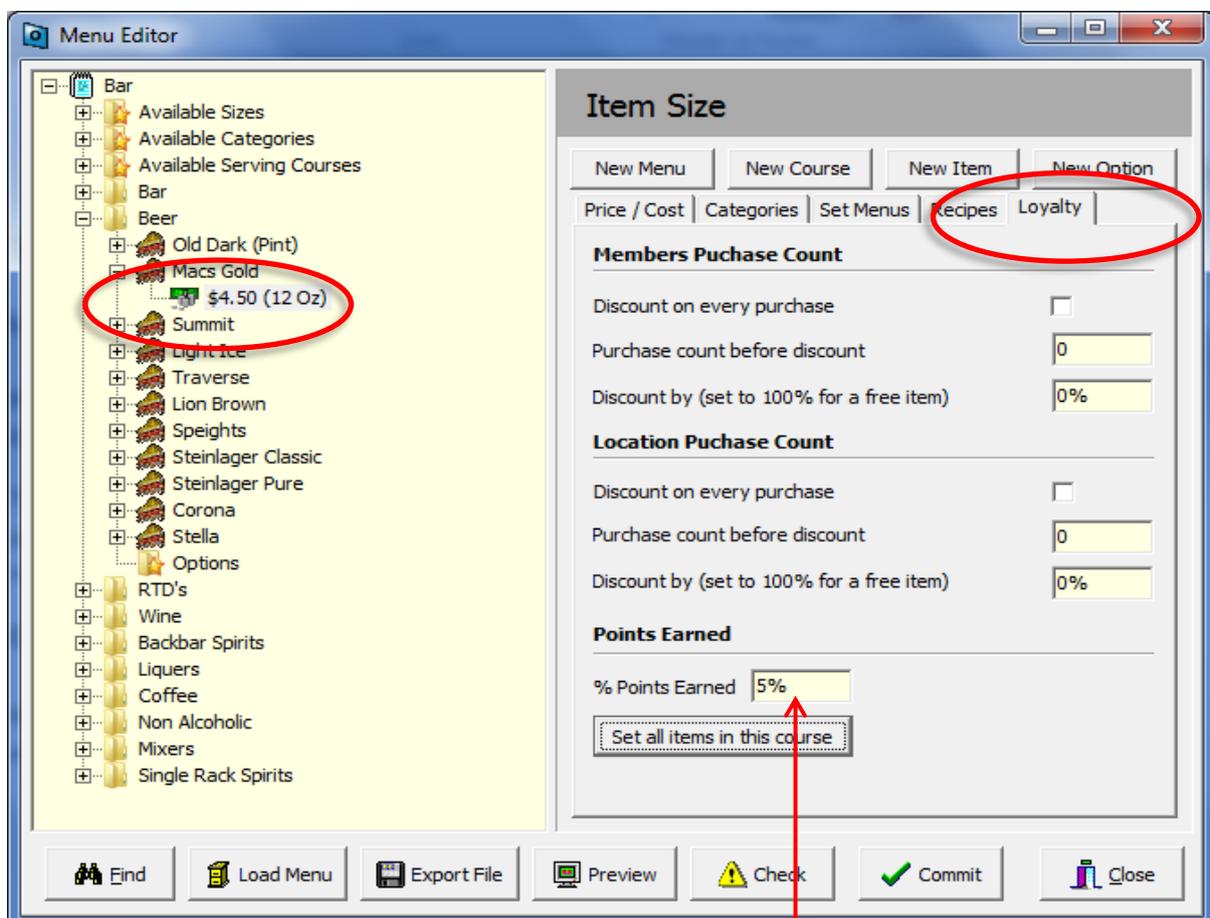
Loyalty Points

While there are many different loyalty reward options in Menumate, the core loyalty rewards are through the earning and redeeming of loyalty points.

Through the Menumate Menu Editor each item can have a loyalty rewards %. Any time an item is purchased by a member they EARN the loyalty rewards for that item. Because each item is set individually there is also the possibility that some items may now have any loyalty rewards at all.

Configuring Loyalty Points in the Menu Editor

When you are in the Menu Editor in Menumate Office you can configure each item to earn a certain percentage of loyalty rewards.



Once you have drilled down in the menu editor to the price and size of an item you will have access to the Loyalty Tab. In the Loyalty Tab you can set the % of Points Earned field to be the amount of loyalty the member will earn when they purchase this item. If you would like all the items in the same course set the same as this product/item them click on the box

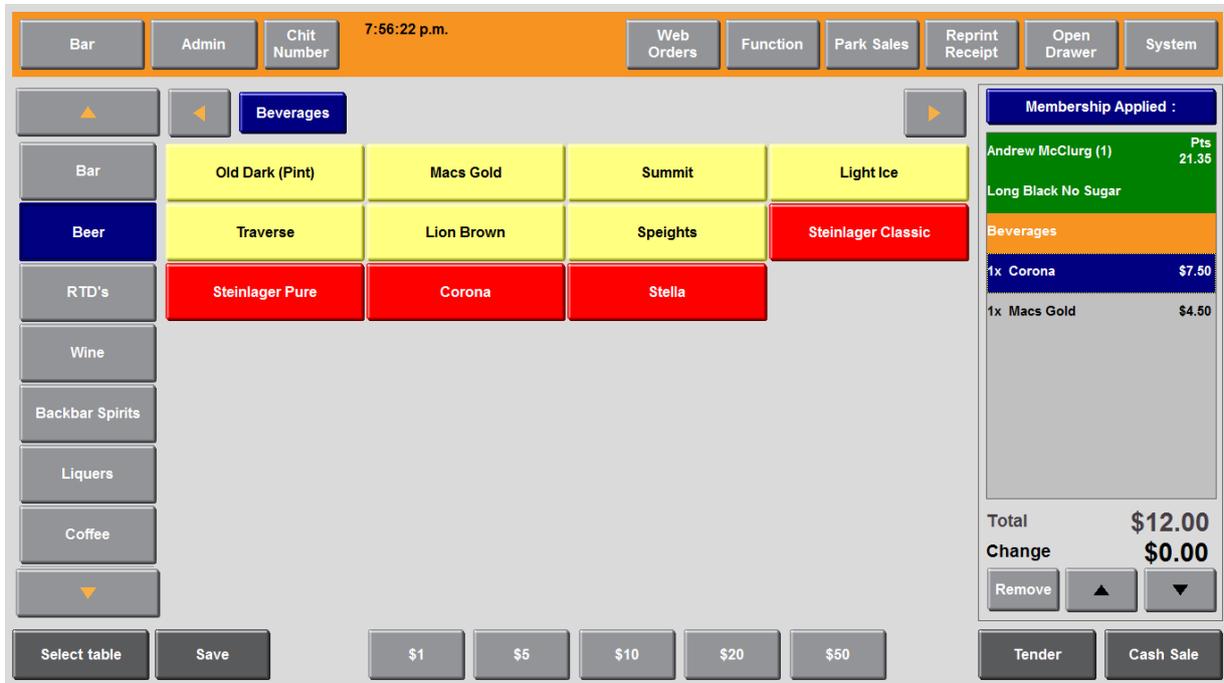
Set all items in this course

As previously mentioned in Step 1 there are a number of standards that have been historically used in hospitality. These do not necessarily mean they need to be followed and there have always been variances. But some of the standards are;

- Coffee = 10% Loyalty
- Beverages = 3% to 5% Loyalty
- Food = 3% to 10% Loyalty

How Members EARN Loyalty Points at POS

At any time through a sale a member can have their loyalty card swiped through the Point of Sale System. Once swiped all items in that sale will be recorded against the member to earn the loyalty Points.

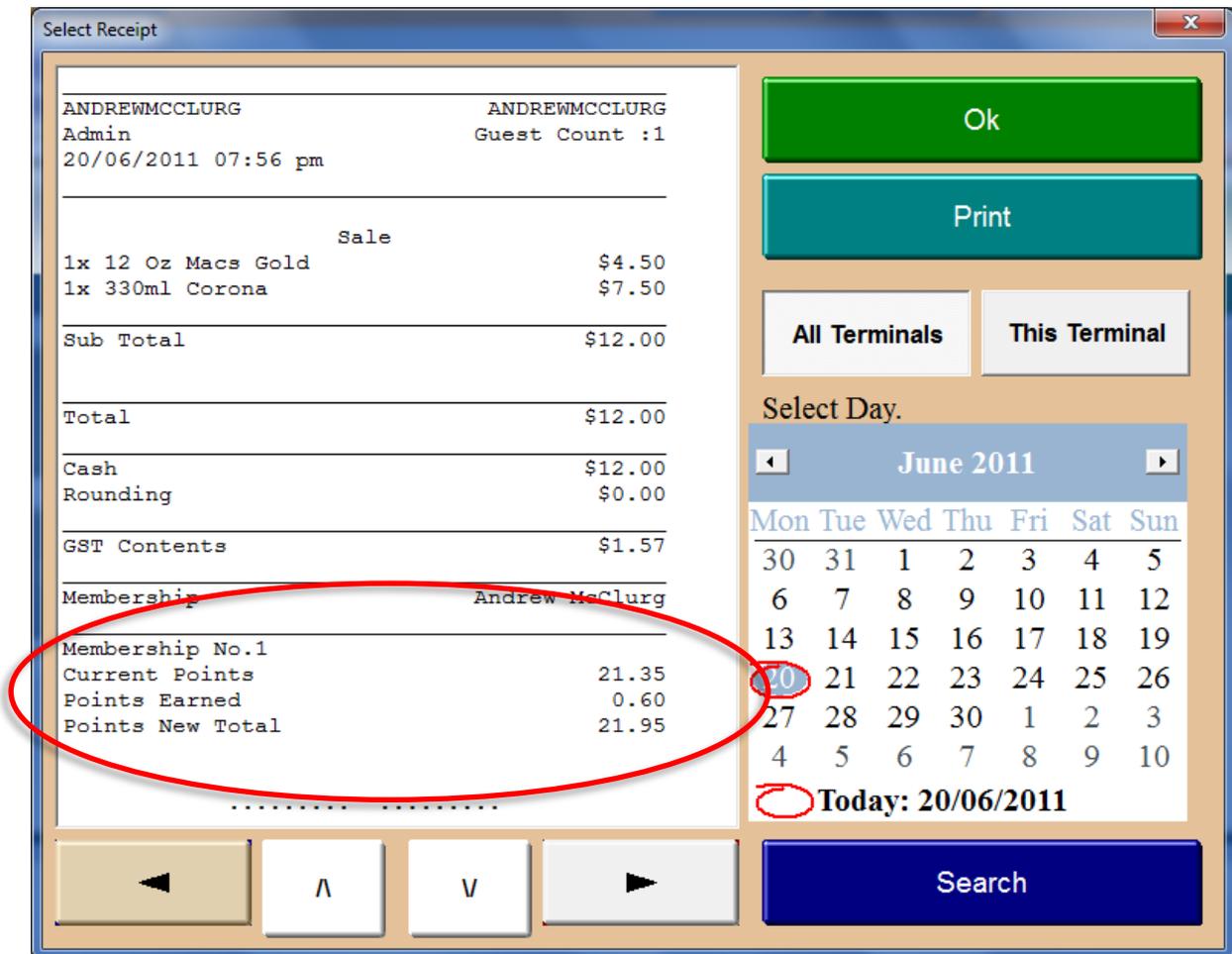


The screenshot shows the Menumate POS interface. At the top, there are buttons for 'Bar', 'Admin', 'Chit Number', 'Web Orders', 'Function', 'Park Sales', 'Reprint Receipt', 'Open Drawer', and 'System'. The time is 7:56:22 p.m. The main menu is categorized by 'Beverages' and includes items like 'Old Dark (Pint)', 'Macs Gold', 'Summit', 'Light Ice', 'Beer', 'Traverse', 'Lion Brown', 'Speights', 'Steinlager Classic', 'RTD's', 'Steinlager Pure', 'Corona', and 'Stella'. On the right, a 'Membership Applied' section shows 'Andrew McClurg (1)' with 21.35 points. Below this, the order summary shows '1x Corona' for \$7.50 and '1x Macs Gold' for \$4.50, with a total of \$12.00 and change of \$0.00. At the bottom, there are buttons for 'Select table', 'Save', '\$1', '\$5', '\$10', '\$20', '\$50', 'Tender', and 'Cash Sale'.

Touch Point #1

When a loyalty card is swiped the member's name and loyalty balance appears on the screen. As one of the reasons for having a loyalty system is to reward and acknowledge regular customer's it is important that the staff take this touch point opportunity to greet the customer by their name on the screen.

When the sale is completed the receipt will show the members points at the start of the sale, the points earned and their new points balance.

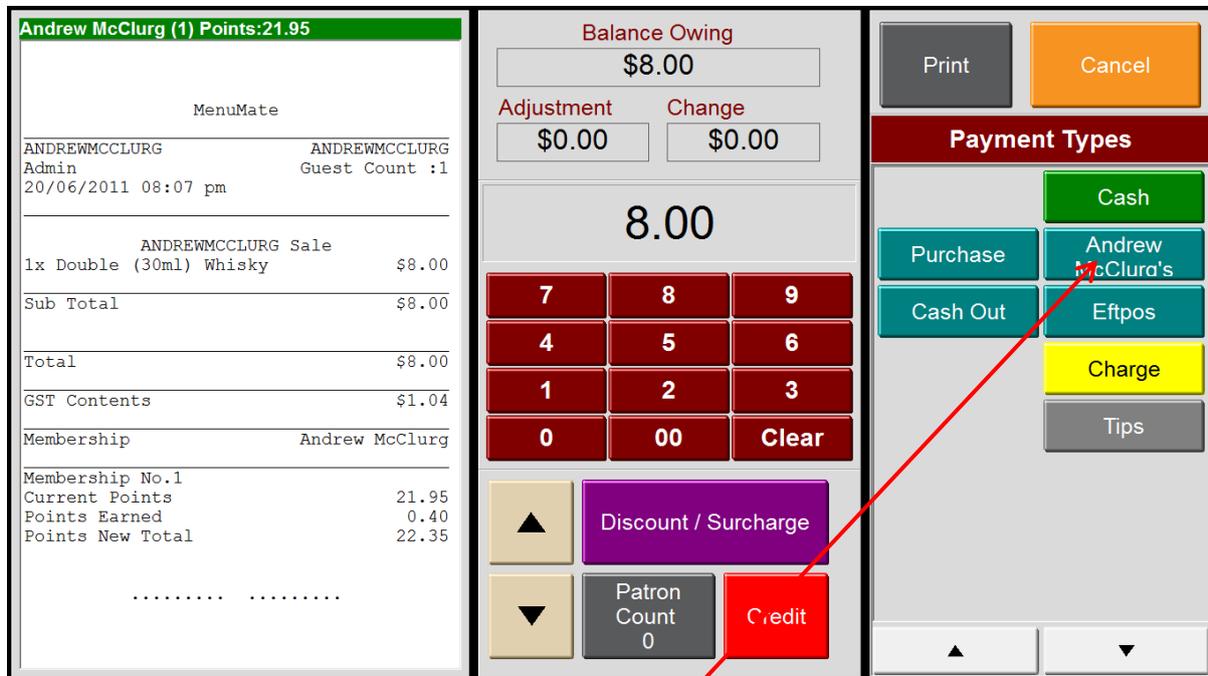


The screenshot shows a software window titled "Select Receipt". On the left is a receipt for "ANDREWMCCLURG Admin" dated "20/06/2011 07:56 pm" with a "Guest Count :1". The receipt lists items: "1x 12 Oz Macs Gold" for \$4.50 and "1x 330ml Corona" for \$7.50, with a "Sub Total" of \$12.00. Below this, it shows "Total" of \$12.00, "Cash" of \$12.00, "Rounding" of \$0.00, and "GST Contents" of \$1.57. A red circle highlights the membership section: "Membership Andrew McClurg", "Membership No.1", "Current Points 21.35", "Points Earned 0.60", and "Points New Total 21.95". On the right, there are buttons for "Ok", "Print", "All Terminals", and "This Terminal". Below these is a "Select Day." calendar for "June 2011" with the date "20" circled in red. At the bottom right, it says "Today: 20/06/2011" with a red circle around "20". Navigation buttons (back, forward, search) are at the bottom.

In the above example the member purchases 1 * 12 Oz Macs Gold and 1 * 330 ml Corona. Each item earned 5% loyalty so the member's points started with 21.35, earned another .60 and now has 21.95.

How Members SPEND Points at POS

As members each loyalty rewards their balance grows and they can use their loyalty balance to purchase items. Once a member has swiped their card and the items have been entered on the POS terminal press the **Tender** button.



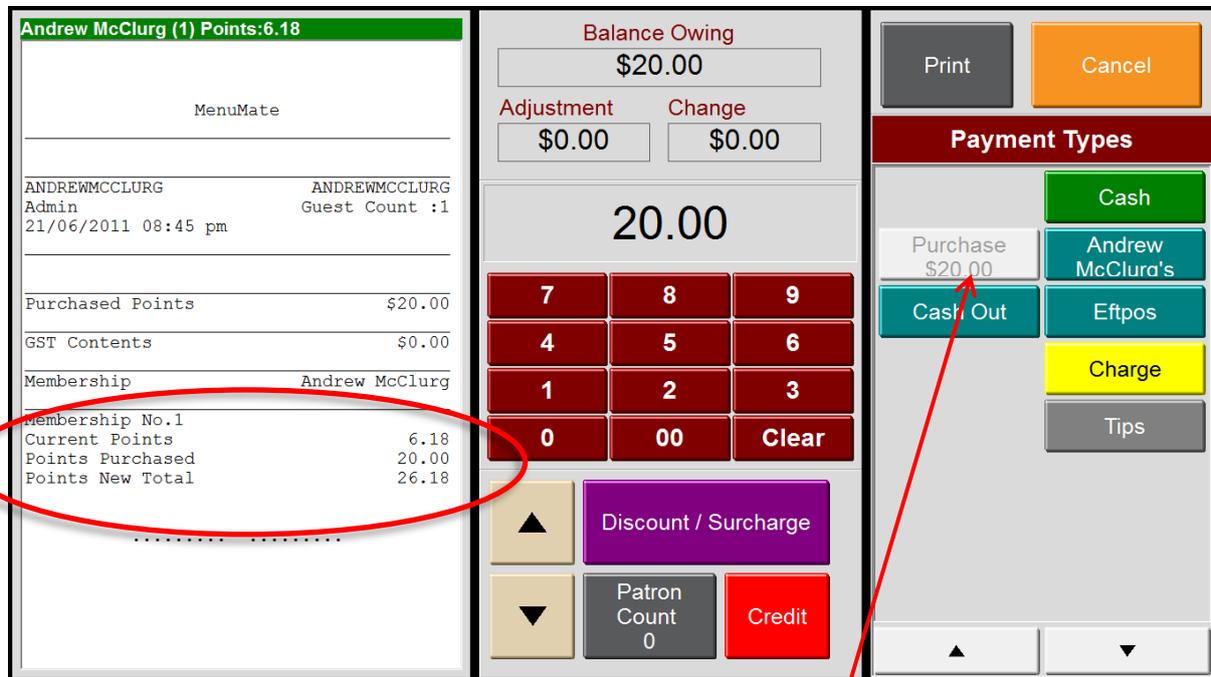
The Members Name will then be available as a payment type. By selecting this payment type the member's points will be used to pay for the items purchased. Like all payment types in MenuMate you can also part pay using Cash or EFTPOS and Loyalty just by entering the amount of points to spend e.g. 4.00 and then pressing the Member's Name.

Touch Point #2

As a member's loyalty balance increases and is enough to pay for a coffee or drink then encourage the staff to acknowledge this with the customer and ask "Would you like to use your loyalty points to make this purchase Free?" Firstly it reminds the customer of the loyalty system they are getting from you and secondly it reduced the loyalty balance.

Members should be Encouraged to Top Up their Balance

Members can load money on their loyalty card and then use their topped up balance to make future purchases. Once a member has swiped their card press the **Tender** button.



The screenshot shows the MenuMate POS interface. On the left, a member's profile is displayed: **Andrew McClurg (1) Points:6.18**. Below this, a table shows the member's current points and the amount being topped up:

Membership	Andrew McClurg
Membership No.1	
Current Points	6.18
Points Purchased	20.00
Points New Total	26.18

The central area shows the **Balance Owing** of \$20.00, with **Adjustment** and **Change** both at \$0.00. A numeric keypad is visible with the amount **20.00** entered. The right side of the screen shows **Payment Types** including **Cash**, **Andrew McClurg's**, **Eftpos**, **Charge**, and **Tips**. A red arrow points from the **Purchase \$20.00** button to the **Andrew McClurg's** payment type button.

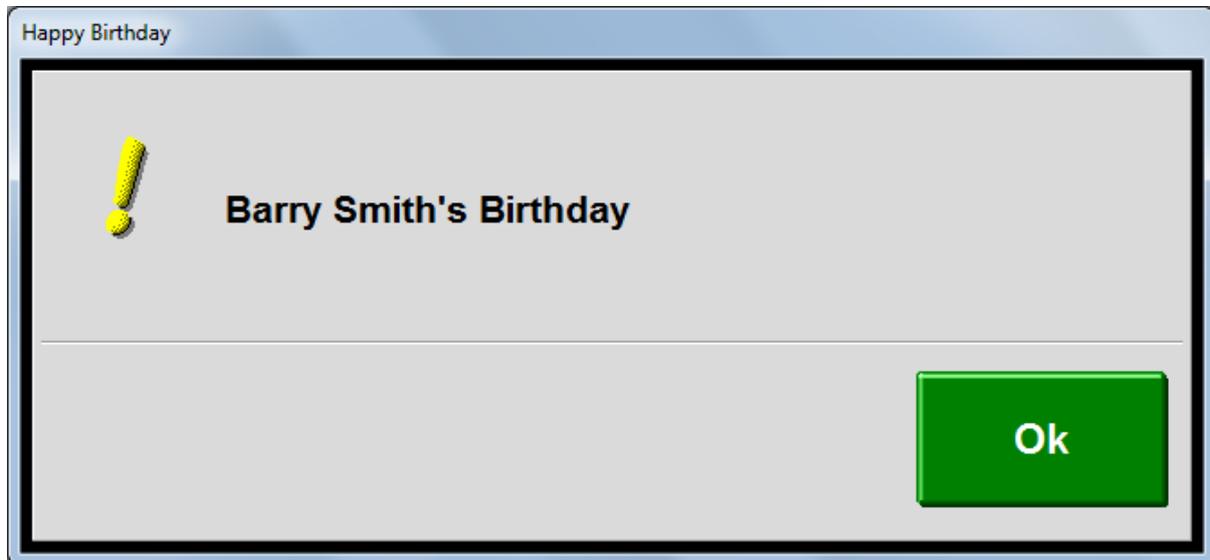
Enter the amount the member wants to top up and press the **Purchase** button next to the member's name, then select the payment type that relates to how the customer is purchasing the additional loyalty rewards, e.g. Cash, EFTPOS.

This will then load the amount onto the member's card.

In the above example the member started with 6.18, loaded (purchased) another 20.00 and the new total is 26.18 of loyalty points.

Congratulations It Is Your Birthday

If member comes in on their birthday then the Menumate Point of Sale will inform the Point of Sale operator/staff member that today is the member's birthday.

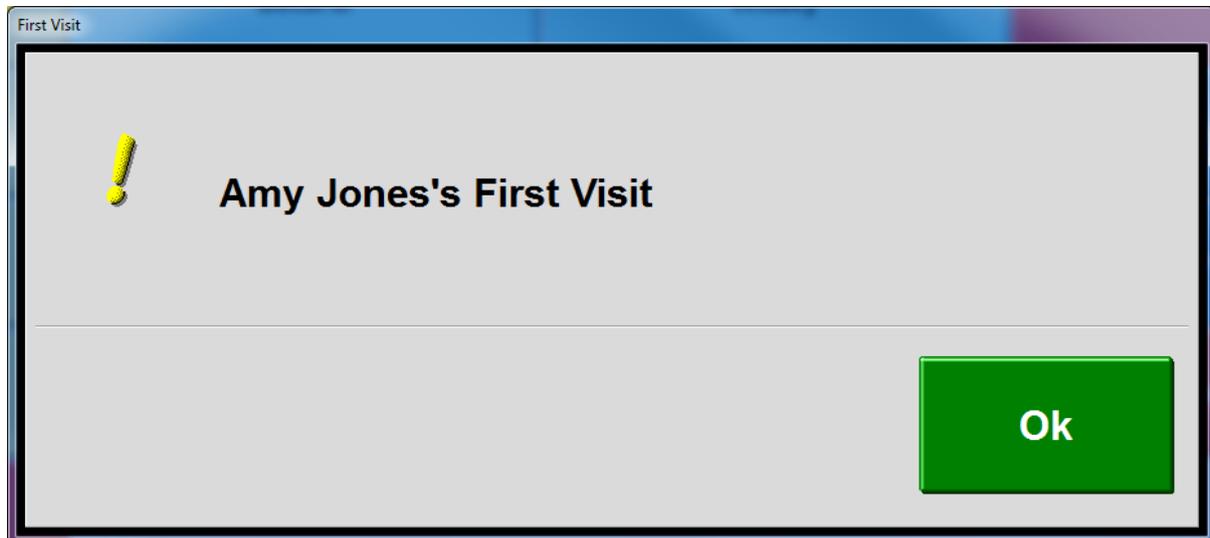


Touch Point #3

While the Menumate Point of Sale does not provide a reward system for a member coming in on their birthday, this is a great way to add another touch point to your loyalty procedures. You could load a discount into your system to give a free coffee or similar. The birthday acknowledgement is certainly a great way to build a relationship with your fans

Thank You for Visiting Us

If member visits a site for the first time then Menumate Point of Sale will inform the Point of Sale operator/staff member that today is the member's first visit.

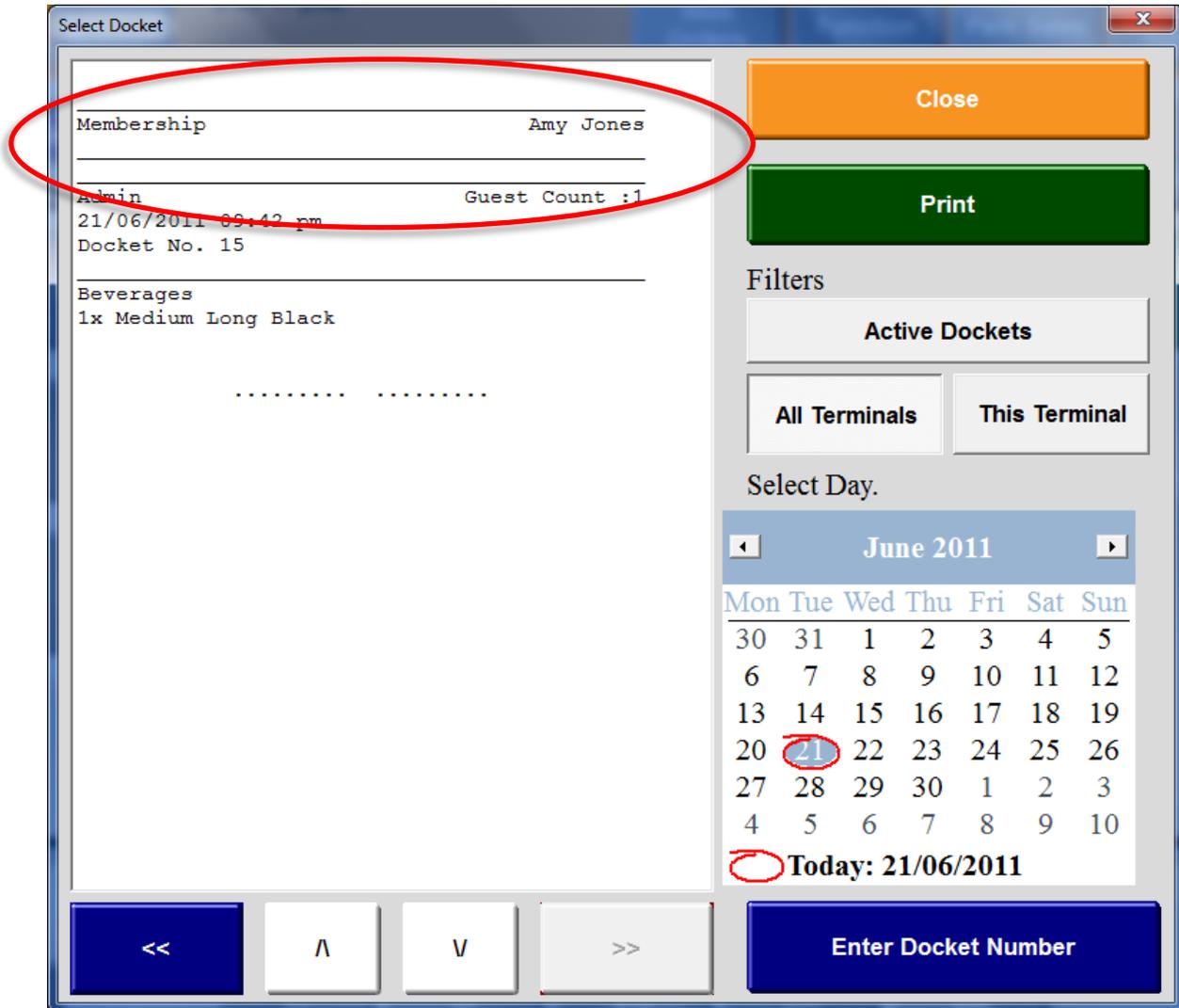


Touch Point #4

While the Menumate Point of Sale does not provide a reward system for a member coming in for the first time, this is a great way to add another touch point to your loyalty procedures. You could load a discount into your system to give a free coffee or similar. The first visit acknowledgement is certainly a great way to build a relationship with your fans

Give Your Staff all the Information Needed

A common reason that a fan will visit a business a lot and make it a habit is the relationship with the staff. Menumate tries to assist to build this bond through touch point #5. One of the Menumate Settings allows you to configure your kitchen printer to print the member's name at the top of the print out.

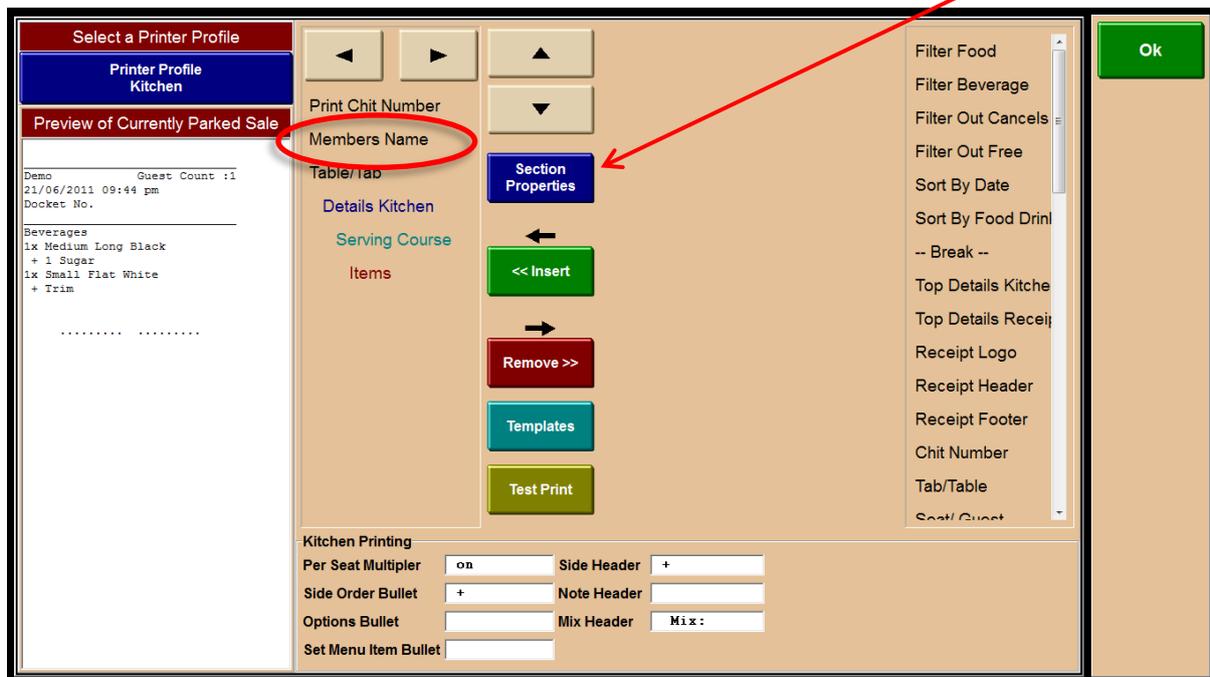


Touch Point #5

By printing the Member's name at the top of the kitchen or Coffee Printer the staff member instead of saying "Long Back takeaway", they can say. "John, here is your Long Black". Instantly the fan feels that you appreciate their business by creating a personal link.

You will need to add the Member's information to your kitchen/barista/bar printer to ensure this print's on the top of the docket. It is not there by default.

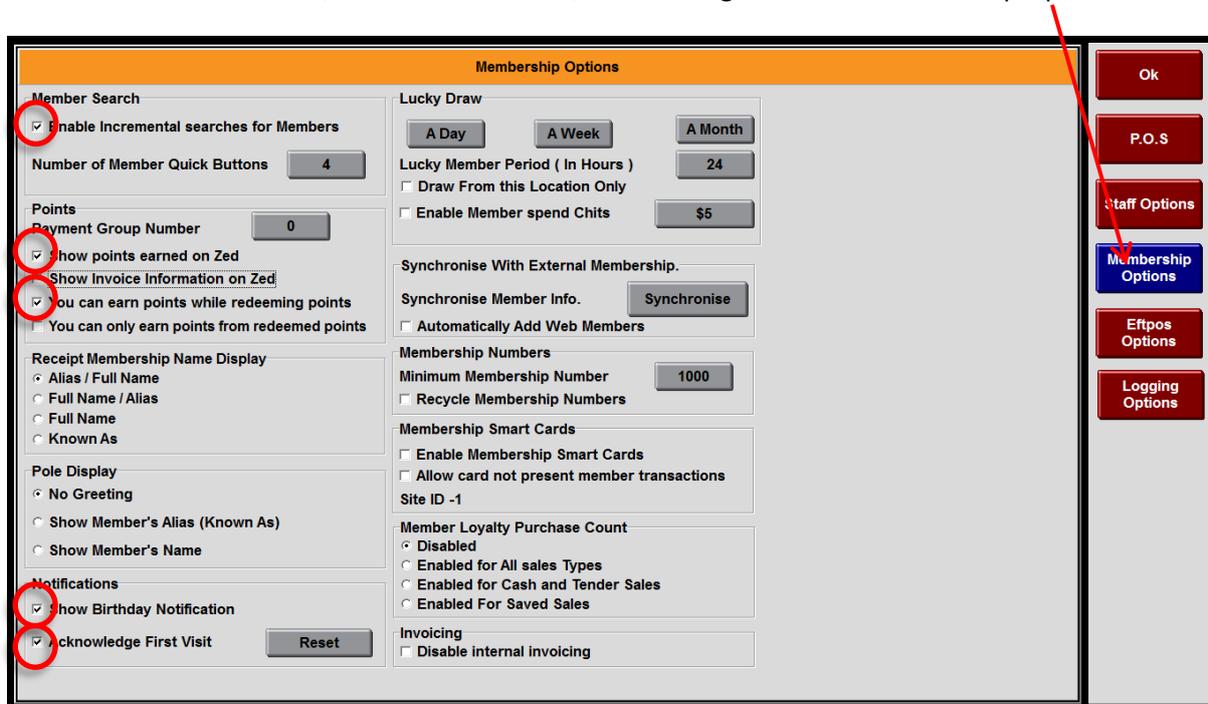
Under Maintenance, Printer Maintenance and Setup Kitchen Docket Format ensure that you insert the Members Name at the top of the template. It is also recommended that you click on Section Properties and Draw a line above and below the title.



Check the Settings for Loyalty Rewards 101

There are some basic settings in Menumate that should be checked to ensure the standard fundamentals work correctly.

From the main POS screen, select Maintenance, Misc Settings and then Membership Options.



The screenshot shows the 'Membership Options' configuration screen. The sections and their settings are as follows:

- Member Search:**
 - Enable Incremental searches for Members
 - Number of Member Quick Buttons: 4
- Points:**
 - Payment Group Number: 0
 - Show points earned on Zed
 - Show Invoice Information on Zed
 - You can earn points while redeeming points
 - You can only earn points from redeemed points
- Receipt Membership Name Display:**
 - Alias / Full Name
 - Full Name / Alias
 - Full Name
 - Known As
- Pole Display:**
 - No Greeting
 - Show Member's Alias (Known As)
 - Show Member's Name
- Notifications:**
 - Show Birthday Notification
 - Acknowledge First Visit
- Lucky Draw:**
 - A Day | A Week | A Month
 - Lucky Member Period (In Hours): 24
 - Draw From this Location Only
 - Enable Member spend Chits: \$5
- Synchronise With External Membership:**
 - Synchronise Member Info. [Synchronise]
 - Automatically Add Web Members
- Membership Numbers:**
 - Minimum Membership Number: 1000
 - Recycle Membership Numbers
- Membership Smart Cards:**
 - Enable Membership Smart Cards
 - Allow card not present member transactions
 - Site ID -1
- Member Loyalty Purchase Count:**
 - Disabled
 - Enabled for All sales Types
 - Enabled for Cash and Tender Sales
 - Enabled For Saved Sales
- Invoicing:**
 - Disable internal invoicing

Go through all of the above circles options and ensure they are ticked.

- **Enable Incremental searches for Members** – this will allow members to be found quicker if being searched manually and not via a card reader/swipe
- **Shows points earned on Zed** – provides a summary of the loyalty rewards on the Zed report at the end of the day
- **You can earn points while redeeming points** – This must be ticked if members are loading money onto their card otherwise they will not earn loyalty rewards correctly. If you do not allow members to pre-load / top up loyalty points then you can leave this unticked.
- **Show Birthday Notification** – This is to ensure when a member comes in on their birthday that the POS informs the POS operator/Staff member
- **Acknowledge First Visit** – This is to ensure when a member visits your site for the first time that the POS informs the POS operator/Staff member

Once you have confirmed all the above options are tick. Click

OK

Step 4 –Loyalty Rewards 201

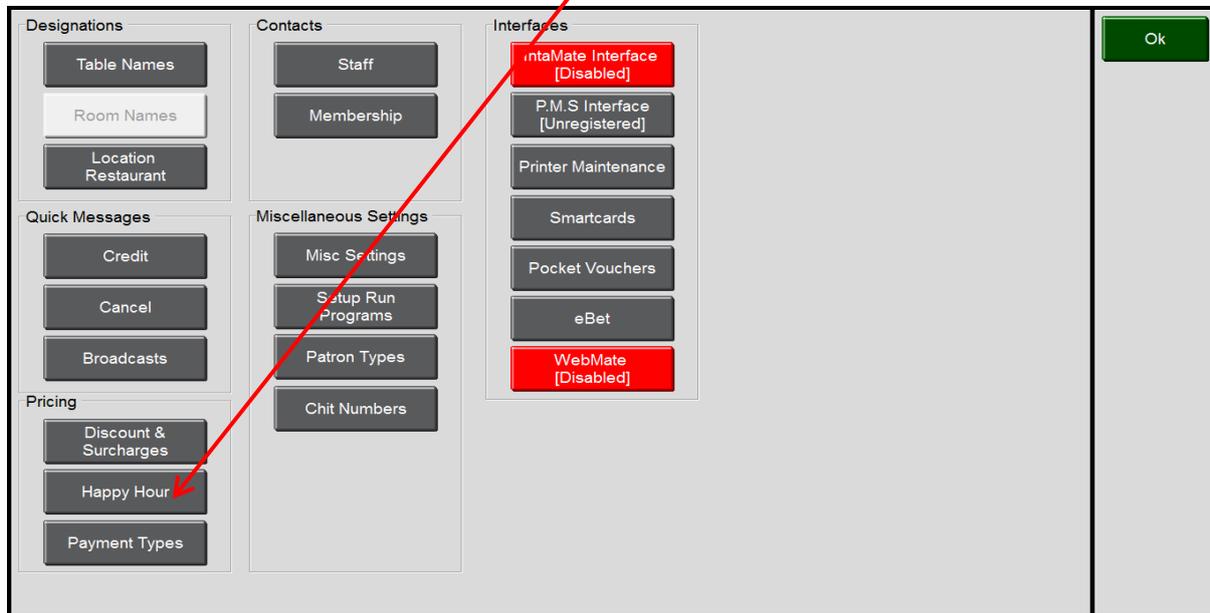
Step 4 – Loyalty Rewards 201

There are many features in Menumate that you can use to turbo boost your loyalty system. Menumate is continuing to add to these features. Step 4 will cover the following turbo boosts that you can implement some or all of in your own system

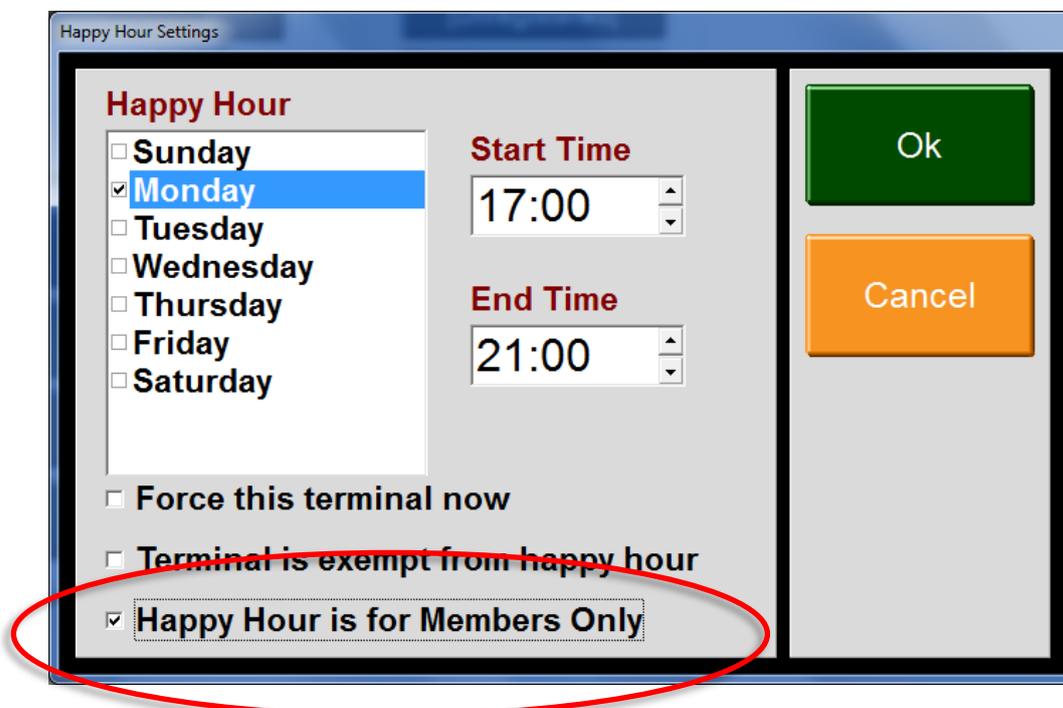
- Members Only Happy Hours
- Exclude Members from Holiday Surcharges
- Luck Member Draws
- Member Lottery Chits
- 10th Product Free (PER Member)
- 10th Product Free (ALL Sales)

Members Only Happy Hours

Using the normal Happy Hour functionality in Menumate you can restrict a happy hour to be for members only. To Setup a Members Only Happy hour, access the Happy Hour functions from Maintenance, Misc Setting and select **Happy Hour**

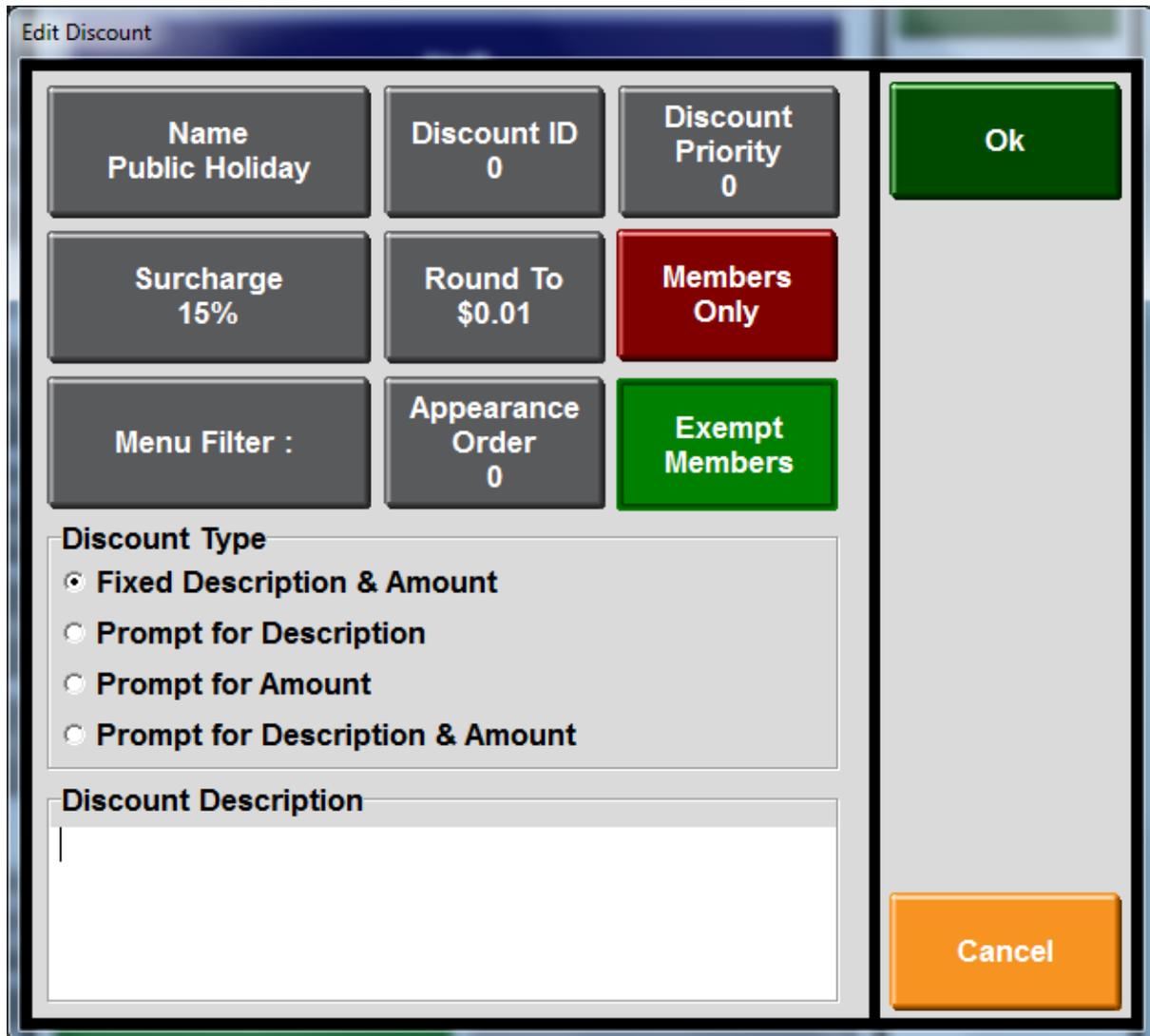


Determine the day, start time and end time of the happy hour and then tick the box Happy Hour is for Members Only. Using this setting the happy hour (special pricing) will only be used if a member swipes their loyalty card during the sale.



Exclude Members from Holiday Surcharges

It is common in hospitality that an additional surcharge is added to bills when a business is open on a public holiday. Menumate has the ability to exclude members from a surcharge. Once the surcharge has been setup select the EXEMPT MEMBERS button, which will turn green.



Edit Discount

Name Public Holiday	Discount ID 0	Discount Priority 0
Surcharge 15%	Round To \$0.01	Members Only
Menu Filter :	Appearance Order 0	Exempt Members

Discount Type

- Fixed Description & Amount
- Prompt for Description
- Prompt for Amount
- Prompt for Description & Amount

Discount Description

Ok

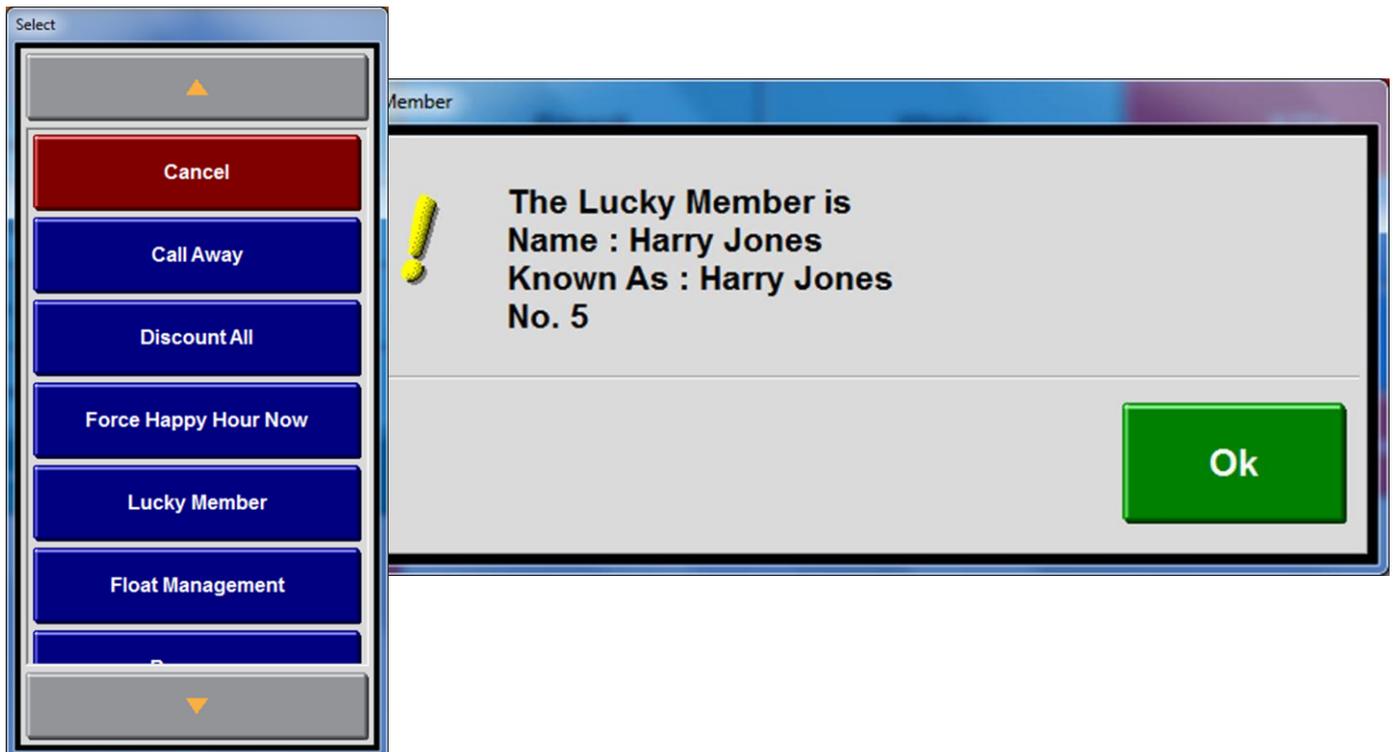
Cancel

When a member uses their loyalty card on a public holiday surcharge the surcharge will be removed from their sale.

Lucky Member Draws

Menumate allows you to draw a lucky member from those members that have made a purchase from either the full business or a specific location for the Day, Week or Month depending on the settings selected.

To draw a lucky member from the POS select **Function** and Lucky Member. This will then display who the lucky member is.

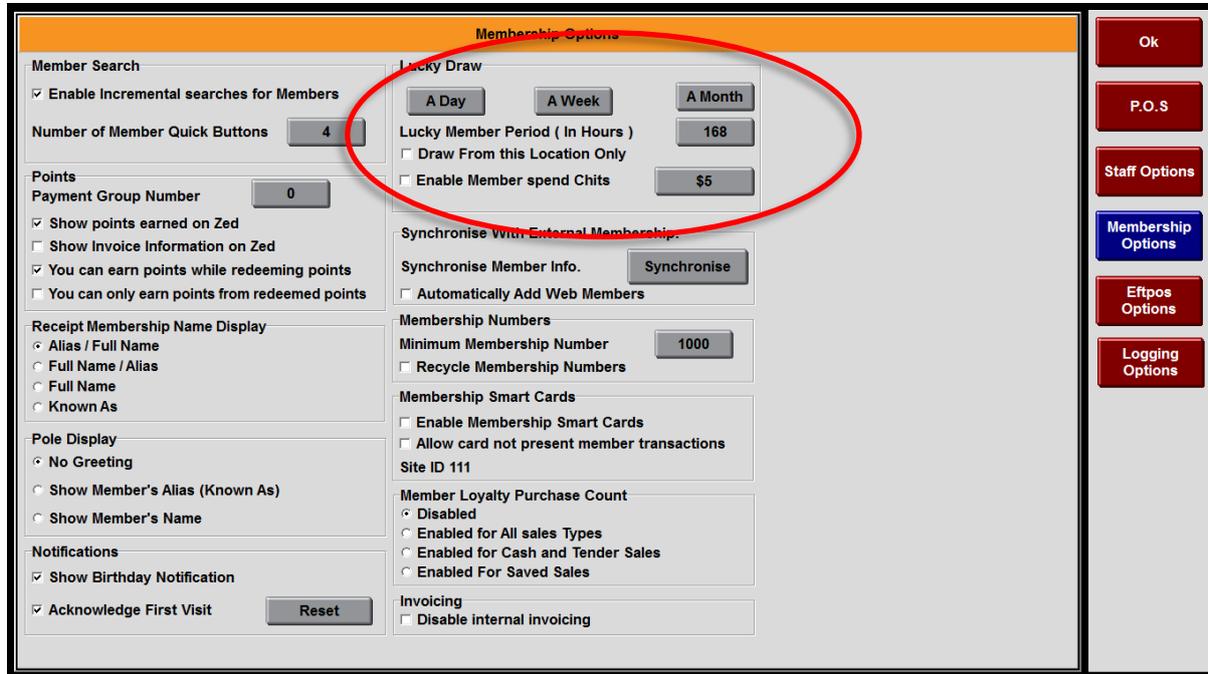


Touch Point #6

You can use the Lucky Member Draw to involve your members in your business and build an atmosphere. Lucky Draws that work at the same time each week may also have a rule that the member needs to be there to win. You can keep drawing until you come up with a member who claims the prize.

Lucky Member Draw Settings

From the Maintenance menu select Misc Setting and Membership Options to access the options that manage the Luck Member Draws.



The screenshot shows the 'Membership Options' configuration window. The 'Lucky Draw' section is highlighted with a red oval. It contains three buttons: 'A Day', 'A Week', and 'A Month'. Below these is a 'Lucky Member Period (In Hours)' field with the value '168'. There are two checkboxes: 'Draw From this Location Only' (unchecked) and 'Enable Member spend Chits' (checked) with a '\$5' value. A 'Synchronise' button is also visible.

You can determine the length of time that member purchased a stored for the lucky draw by selecting either **A Day** , **A Week** or **A Month** .

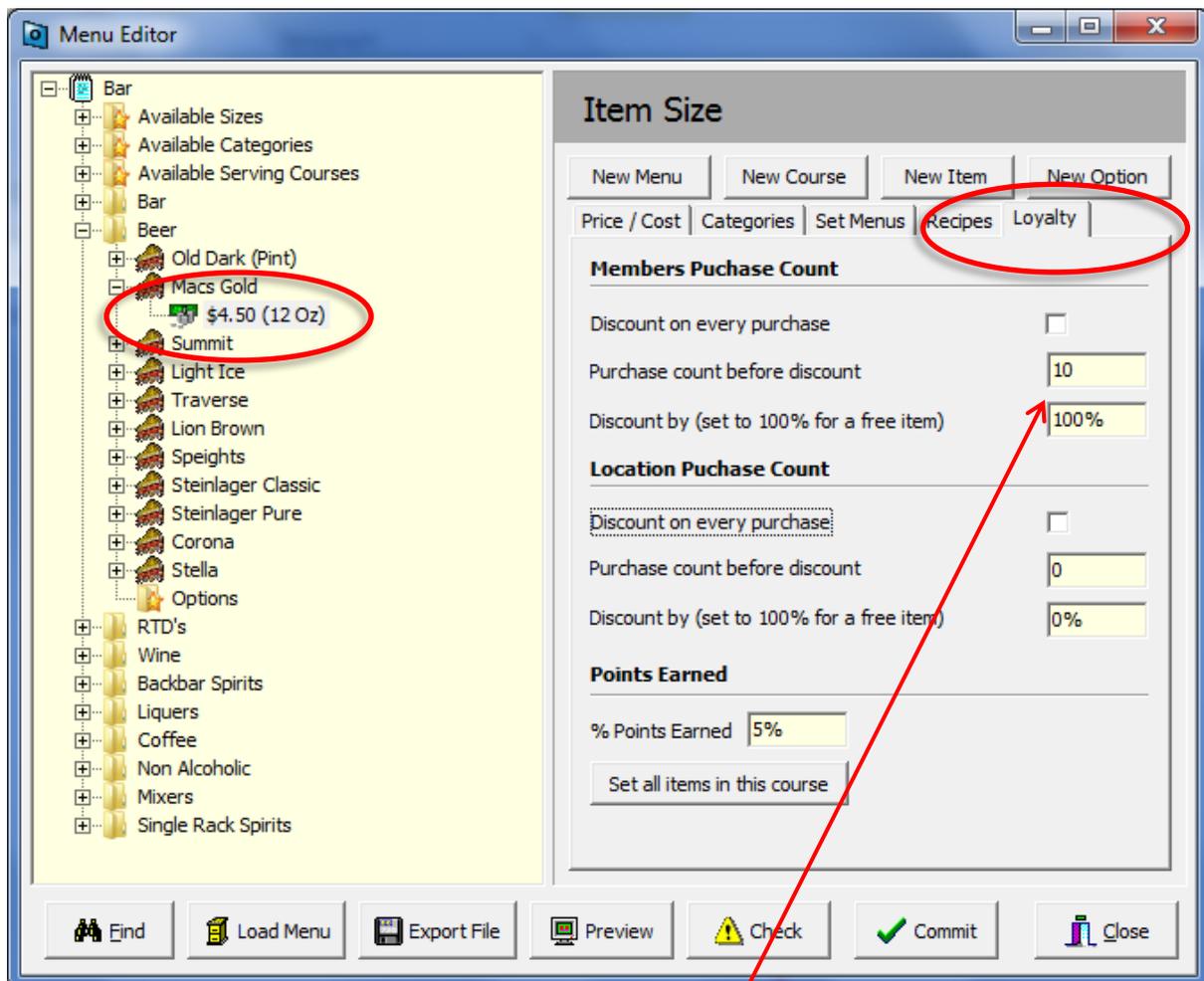
You can also limit purchases to just the one location if you have multiple sales areas and only want members who have made a purchase in the one area to be entered into the draw. E.g., Only in the Bar and not in the Bottle Store.

10th Product Free (Per Member)

Menumate can be configured to reward a member with their 10th product purchase free. Actually you can configure menumate to give any number free and also it does not need to be free, it could be ½ priced.

Configuring Free Product in the Menu Editor (Per Member)

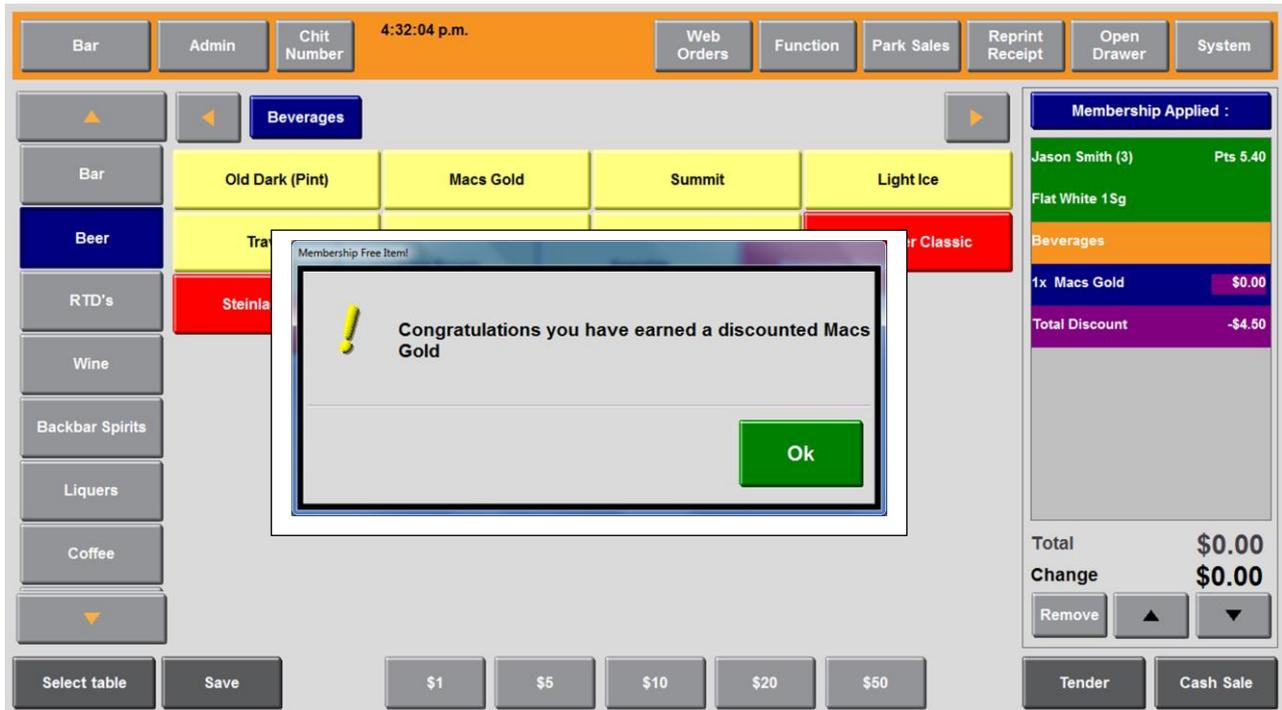
When you are in the Menu Editor in Menumate Office you can configure each item to determine the number they need to purchase and the discounted percentage.



Once you have drilled down in the menu editor to the price and size of an item you will have access to the Loyalty Tab. In the Loyalty Tab you can set Purchase Count before discount to the number the customer needs to purchase e.g. 10 and the Discount by to how much the discount is. If it is every 10th item free then you can set the purchase count to 10 and the discount by to 100. The important thing to realise is that they member must by the same item/size to get to the purchase count.

Touch Point #7

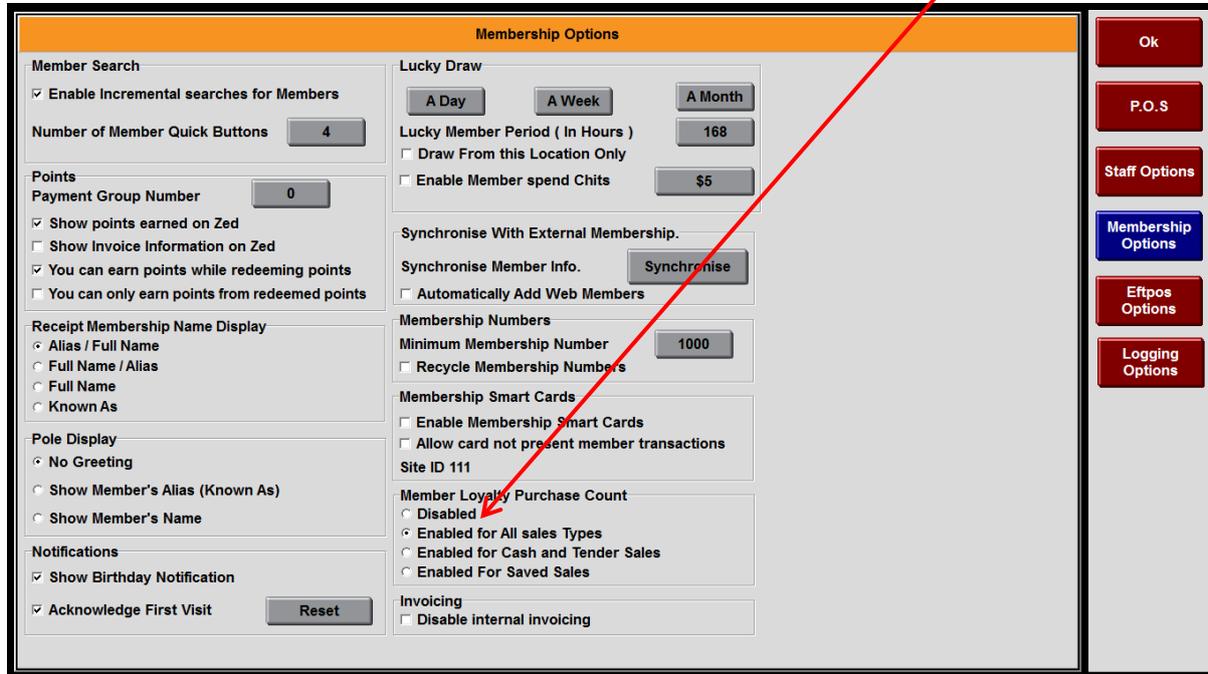
Nothing is happier to be received than something that is a surprise. Especially when it is free! While some member's will keep their own count as to how many items they have purchased the majority of them will receive the free or discount item gratefully. It is a useful tool to continue to build that relationship. If your members build a relationship with you then they will keep coming back.



The above example shows that the Mac's Gold has automatically be discounted by 100% at it was the member's 10th purchase.

Configuring Free Product in the Point of Sale (Per Member)

From the Maintenance menu select Misc Setting and Membership Options to access the options that manage the Free Product count. You need to turn the Member Loyalty Purchase Count on.



The screenshot shows the 'Membership Options' configuration window. The 'Member Loyalty Purchase Count' section is highlighted with a red arrow. The options are:

- Disabled
- Enabled for All sales Types
- Enabled for Cash and Tender Sales
- Enabled For Saved Sales

Other visible options include:

- Enable Incremental searches for Members
- Number of Member Quick Buttons: 4
- Points: Payment Group Number: 0
- Show points earned on Zed
- Show Invoice Information on Zed
- You can earn points while redeeming points
- You can only earn points from redeemed points
- Receipt Membership Name Display:
 - Alias / Full Name
 - Full Name / Alias
 - Full Name
 - Known As
- Pole Display:
 - No Greeting
 - Show Member's Alias (Known As)
 - Show Member's Name
- Notifications:
 - Show Birthday Notification
 - Acknowledge First Visit
- Lucky Draw:
 - A Day | A Week | A Month
 - Lucky Member Period (In Hours): 168
 - Draw From this Location Only
 - Enable Member spend Chits: \$5
- Synchronise With External Membership:
 - Synchronise Member Info: Synchronise
 - Automatically Add Web Members
- Membership Numbers:
 - Minimum Membership Number: 1000
 - Recycle Membership Numbers
- Membership Smart Cards:
 - Enable Membership Smart Cards
 - Allow card not present member transactions
- Site ID: 111
- Invoicing:
 - Disable internal invoicing

You can control the Loyalty Purchase Count more by excluding different type of sales and maybe limiting it to cash sales only and not tabs or table sales. Typically the usual setting is to **Enable for All Sales Types**.

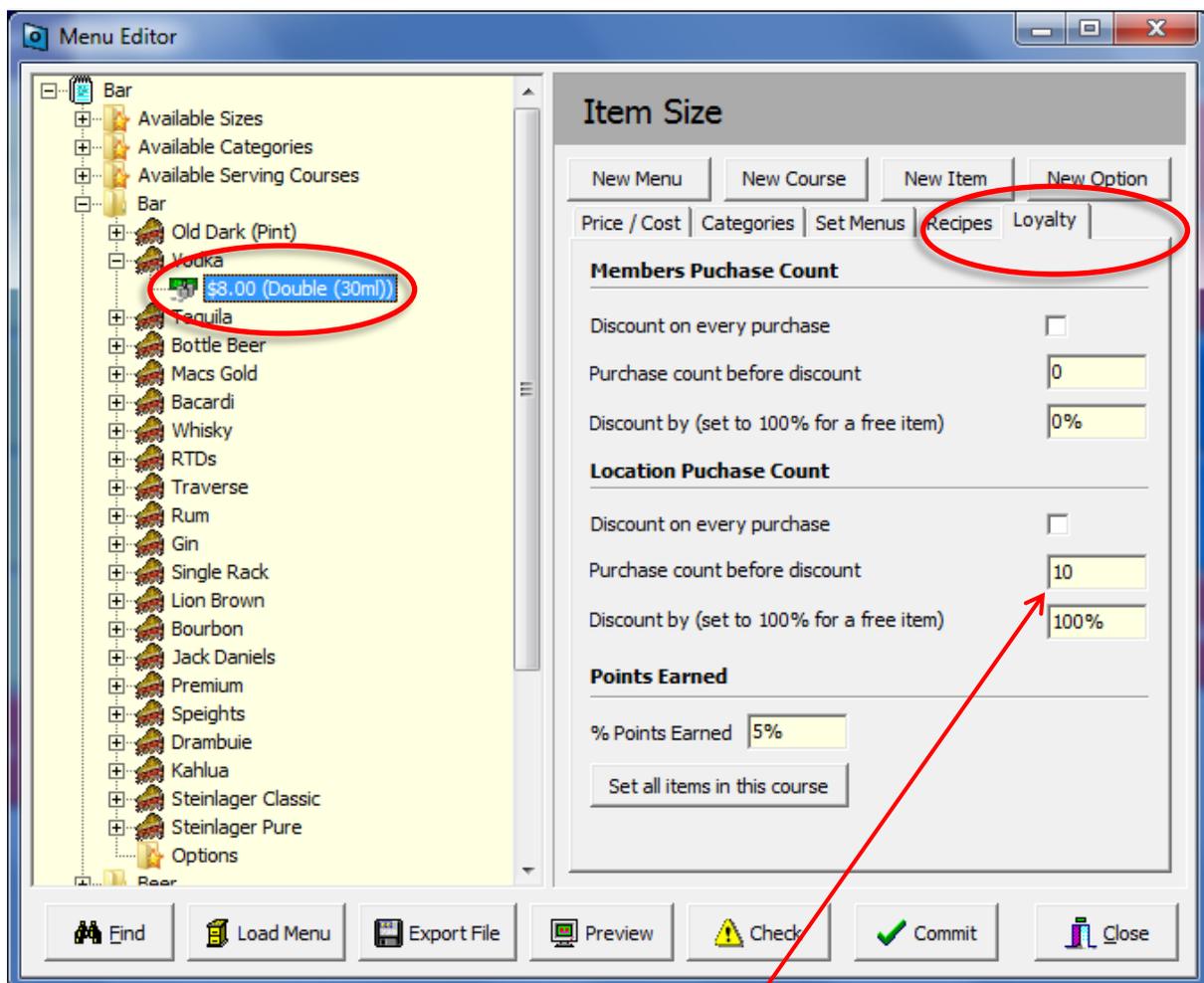
If this is not ticked then no count will be kept for any products.

10th Product Free (All Sales)

Menumate can be configured to reward any customer with a free product purchase when that product has been sold 10 times. Actually you can configure menumate to give any number free and as an option it does not need to be free, it could be ½ priced.

Configuring Free Product in the Menu Editor (All Sales)

When you are in the Menu Editor in Menumate Office you can configure each item to determine the number they need to purchase and the discounted percentage.



Once you have drilled down in the menu editor to the price and size of an item you will have access to the Loyalty Tab. In the Loyalty Tab you can set Purchase Count before discount to the number the customer needs to purchase e.g. 10 and the Discount by to how much the discount is. If it is every 10th item free then you can set the purchase count to 10 and the discount by to 100.

Touch Point #8

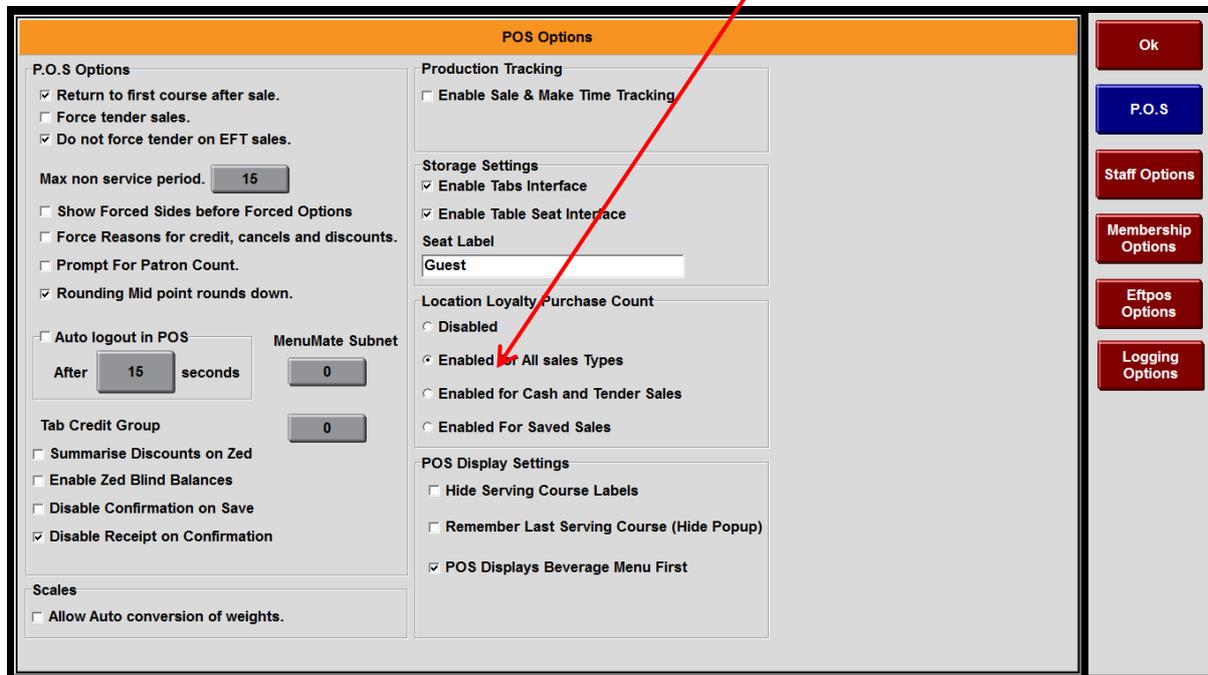
While this is not directly linked to the loyalty system it is a very good way to interact with your customers. A customer may come up to the bar and buy a drink that they have never purchased before and just because it is the 10th time that was purchased then they will get it free. Not many customers will be unhappy with something free!



The above example shows that the Vodka has automatically be discounted by 100% at it was the member's 10th purchase.

Configuring Free Product in the Point of Sale (All Sales)

From the Maintenance menu select Misc Setting and POS to access the options that manage the Free Product count. You need to turn the Location Loyalty Purchase Count on.



The screenshot shows the 'POS Options' configuration window. The 'Location Loyalty Purchase Count' section is highlighted with a red arrow pointing to the 'Enabled for All sales Types' radio button. Other sections include P.O.S Options, Production Tracking, Storage Settings, and POS Display Settings.

You can control the Loyalty Purchase Count more by excluding different type of sales and maybe limiting it to cash sales only and not tabs or table sales. Typically the usual setting is to **Enable for All Sales Types**.

If this is not ticked then the products will not be kept count.

Important Not on Free Product Counts

The Free item is only given on the NEXT sale. So if the current count is 7 and someone purchases 5 then the count is 12. It is only the NEXT sale that checks to see if the count is above the set number (e.g. 10) and then given free. The count would then start back at 2. This is the same for both the Per Member and All Sales setting.

Step 5 – Not All Members are Created Equal

Step 5 – Not All Members are Created Equal

Each member in Menumate Point of Sale can be configured to have their own loyalty profile that determines how their loyalty card works and any additional discounts they get.

Adjusting the Members profile is done by selecting Maintenance and Membership from the main Point of Sale screen. This will display the membership maintenance screen.

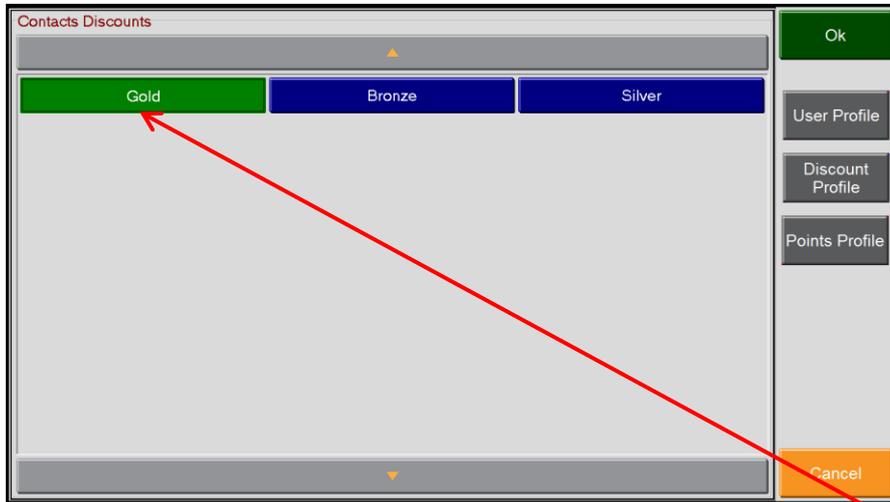
Contact Details <input type="button" value="Edit"/>		Date Of Birth <table border="1"> <tr> <th>Day</th> <th>Month</th> <th>Year</th> </tr> <tr> <td><input type="text" value="12"/></td> <td><input type="text" value="11"/></td> <td><input type="text" value="1990"/></td> </tr> <tr> <td colspan="2"><input type="button" value="Clear Birthday"/></td> <td><input type="button" value="Set Birthday"/></td> </tr> </table>		Day	Month	Year	<input type="text" value="12"/>	<input type="text" value="11"/>	<input type="text" value="1990"/>	<input type="button" value="Clear Birthday"/>		<input type="button" value="Set Birthday"/>	<input type="button" value="Ok"/>	
Day	Month	Year												
<input type="text" value="12"/>	<input type="text" value="11"/>	<input type="text" value="1990"/>												
<input type="button" value="Clear Birthday"/>		<input type="button" value="Set Birthday"/>												
Name Harry Jones Known As Harry Jones Member Number 5 Title Sex Contact Phone Mobile 0294 369 217 E-Mail harryj@menumate.com Location Address: Mailing Address : Displayed Note :		Points Points Total : 0.40		<input type="button" value="User Profile"/> <input type="button" value="Discount Profile"/> <input type="button" value="Points Profile"/>										
		Credit Details Allowed Tab <input type="button" value="Allowed Tab"/>												
		Card Details <input type="button" value="Swipe Card(s)"/> <input type="button" value="Remove Card"/> <input type="button" value="Clear All Cards"/>												
Smart Card Space Used 97 of 206				<input type="button" value="Cancel"/>										

Gold Membership Discount

Menumate allows you to add additional discounts over and above the loyalty rewards or instead of loyalty rewards that are applied when a member swipes their loyalty card.

From the members maintenance screen select

Discount Profile



You can then link the required discount or discounts to the member. Any discount that is green is now applied to that member. The discounts need to be setup in discount maintenance first. At the point of sale the items sold will automatically be discounted

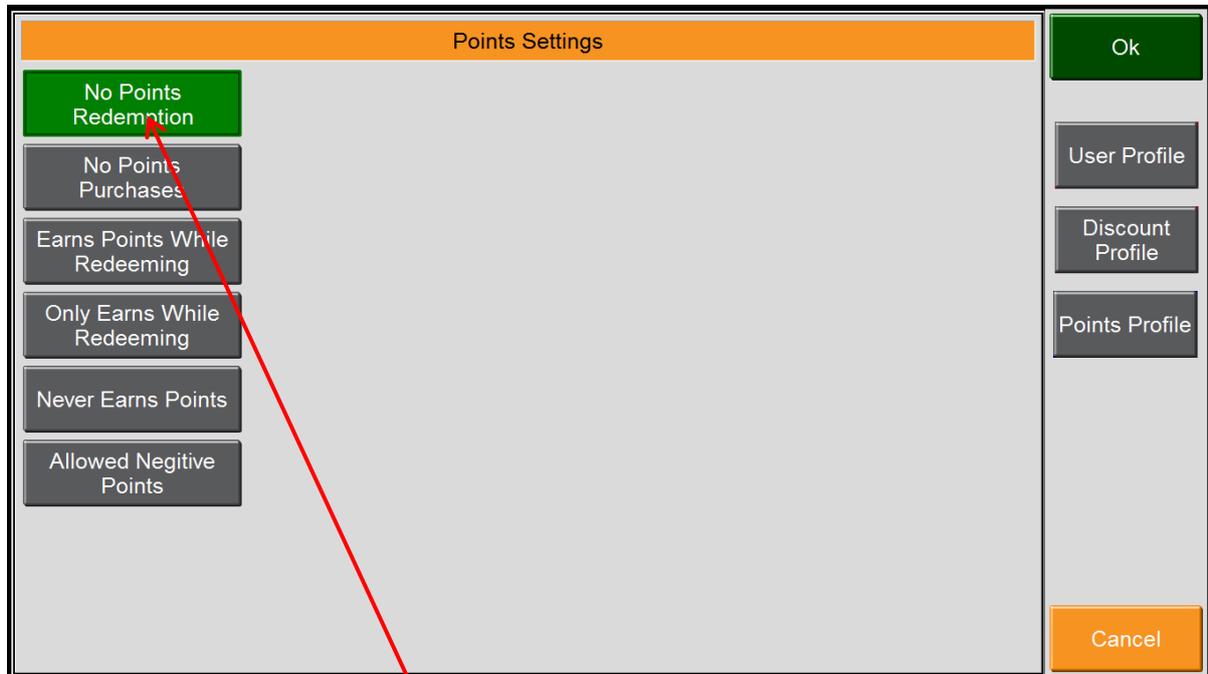


Personalising How Loyalty Points Work for Individual Members

Menumate allows you to modify how a member earns and spends their loyalty points

From the members maintenance screen select

Points Profile



Each option when select will turn green.

- **No Points Redemption:** If highlighted will mean the member cannot redeem points. They can only earn them.
- **No Points Purchases:** if highlighted will mean the member cannot load money on to their account or purchase loyalty points.
- **Earn Points While Redeeming:** if highlight will over write the system settings and allow the member to earn points while they are spending points while other members would not earn points when spending them.
- **Only Earns While Redeeming:** if highlighted the member will not earn points if they pay cash but will only earn points when they are redeeming loyalty rewards they have pre-purchased.
- **Never Earns Points:** if highlighted will stop a member every earning points. As an example they may only get a discount
- **Allowed Negative Points:** if highlighted will allow a member's balance to go into negative.

Step 6 – Communication to Your Fans

Step 6 – Communication to Your Fans

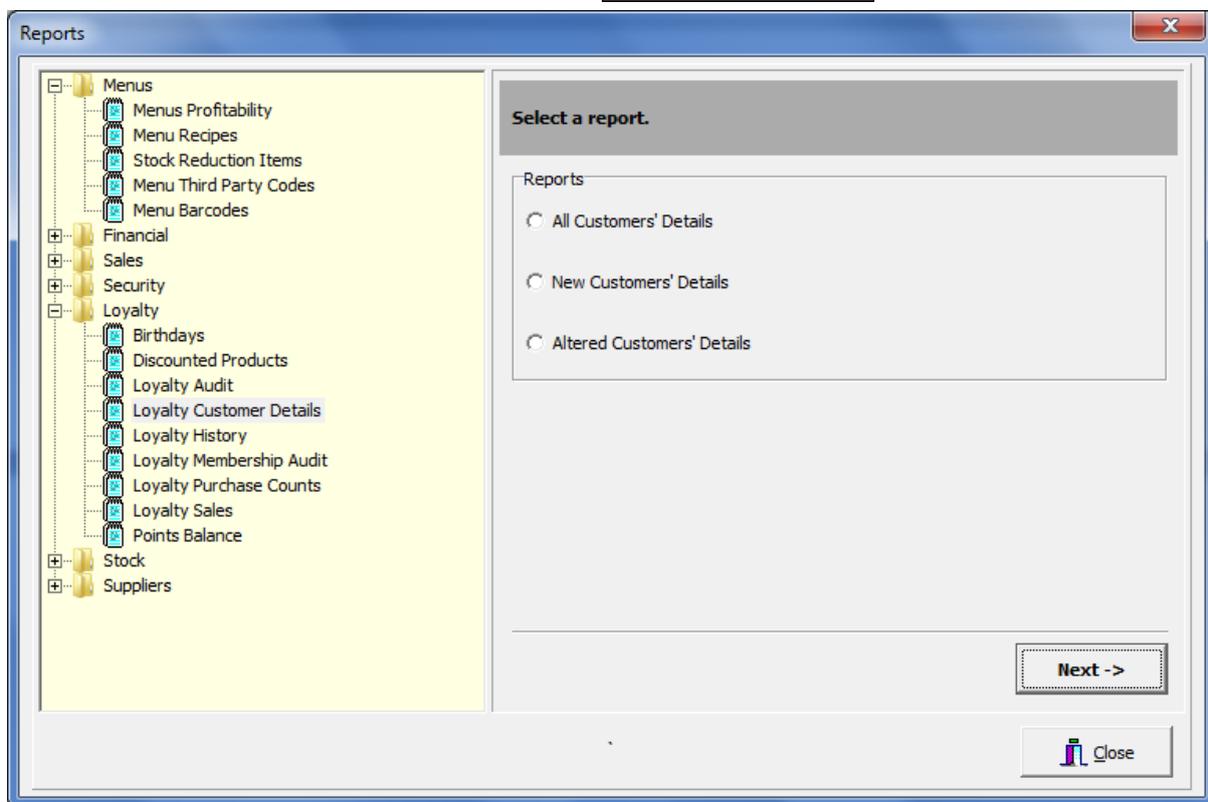
Menumate office allows you to export out information to communicate to your fans via email, txt, post etc.

Menumate does not drive these communications directly but instead provides you with the ability to export out your customer base and then you can use that data through other third party email clients or mail merges. (Microsoft Office, Mail Chimp, Vertical Response etc)

Exporting Member Details to Excel

In Menumate Office Reports use the Loyalty Customer Details report to generate the data to be exported. Instead of previewing the report select

Export to Excel



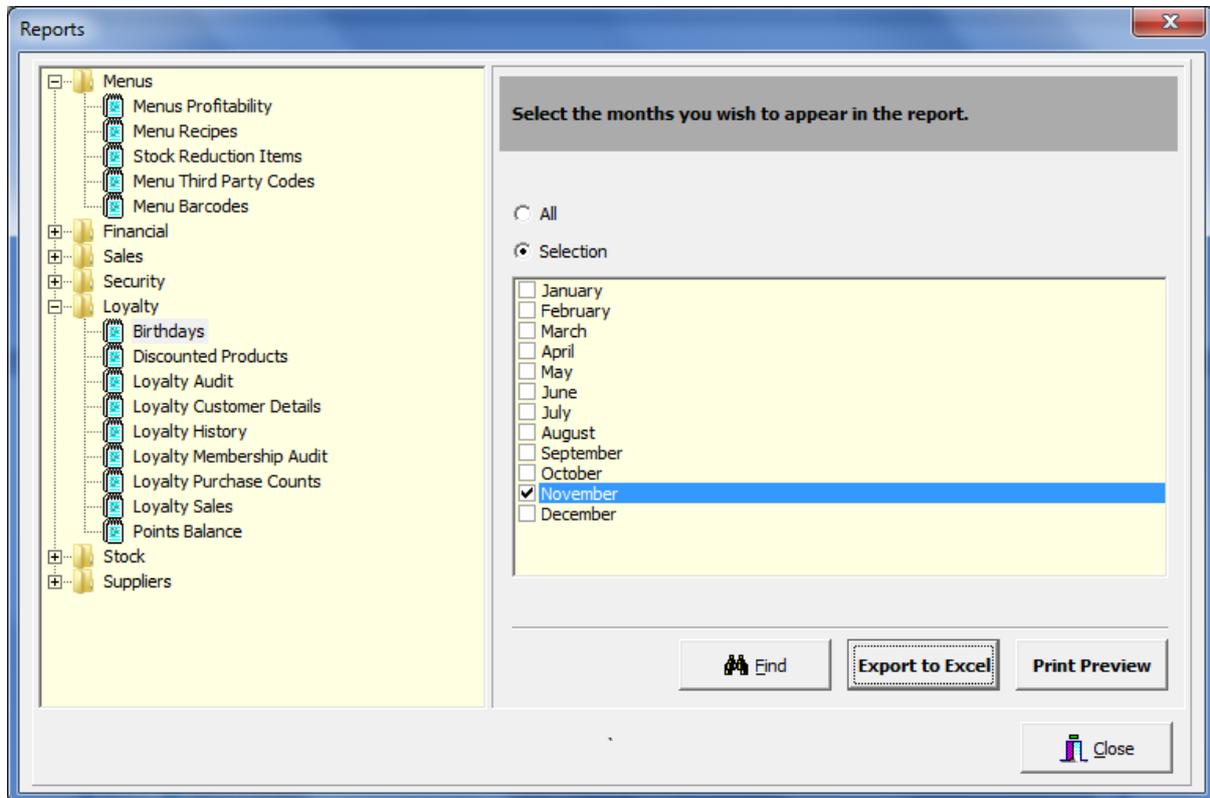
Touch Point #9

The Loyalty Customer Details allows you to export out the details of ALL CUSTOMERS and also NEW CUSTOMERS. Sending a communication to all NEW CUSTOMERS is a great way of reminding them that they joined the loyalty system. You can use this export to mail merge a letter, envelop and voucher to post to them.

Happy Birthday! Here is a Free Meal Voucher

In Menumate Office Reports use the Birthdays report to generate the data of all members who have a birthday in a certain month. Instead of previewing the report select

Export to Excel



Touch Point #10

By inviting your customers to come and buy something on their birthday will also encourage them to bring their family and/or friends and ultimately spend more at your business. More importantly they also continue to feel the relationship with your business and continue to visit on a regular basis.