



Soft Intelligence, Inc.

Overview for Loyalty Points Plus
Revised 08/25/2016

Loyalty Points Plus simplifies the Donation of Customer Loyalty Points.

Donation Process:

Anytime during a sales transaction, the cashier can select DONATE POINTS.



The current customer is automatically selected and their current points balance is displayed.

Ticket Profile Fields

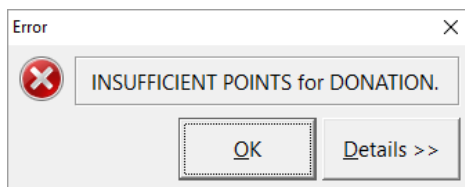
Donor 1000 Bill Baker

Donation 12833

Recipient

OK Cancel Help

Any number of points, up to the current balance, may be donated. Controls are in place to prevent the donation from exceeding the current balance.



Filters will limit the available recipients.
No donation is made if the RECIPIENT is left blank.

You should enter the DONATION as a positive number..



*DONATE is added to the ticket, if no recipient is selected, no donation occurs and the item description will remain "No Donation Made".

If a recipient is selected, the Description will show the number of points donated and the recipient.

Customer #: Bill Baker (1000)		
Item number	Description	Q
*DONATE	No Donation Made	
>	(new line)	

Customer #: Bill Baker (1000)		
Item number	Description	Qu
*DONATE	Donation of 100 Loyalty Pts to Operation Kindness	
>	(new line)	

An additional receipt/message will print with the details of the donation.



Posting Loyalty Point Donations:

Your end of day process will now include Posting your Loyalty Points Adjustments.



You can run the LP Edit List to view donations prior to posting.

The "Document #" will be the ticket number with the donation. Your recipient will also show the Ticket # for Document # if there was a single donation

Every donation creates 2 adjustments, a downward adjustment for the donor and an upward adjustment for the recipient. The Comments for the donor adjustment will provide information about the donation (Recipient). The Recipient comments will show the donor if there was a single donation made to that recipient that day. If there are multiple donations, then the comment will read MULTIPLE and the number of points will be the sum of the donations.

Bat ID: DONATION

Order by: Bat ID, Customer #, Trx date

Customer # Name Loyalty program	Document # Trx date Description	Comment	Points
1000 Bill Baker LOYAL-1	100478 8/25/18 Loyalty program 1	DONATION to Charity	-250
CHARITY Charity LOYAL-1	100478 8/25/18 Loyalty program 1	DONATION from Bill Baker	250

		Total Qty Adj
Report totals:	1 Upward adjustments	250
	1 Downward adjustments	-250
	2 Total adjustments	0

If you have only used the DONATION batch for Loyalty Points Donations, then your TOTAL ADJUSTMENTS at the end of the report should be zero

Report totals:	1 Upward adjustments	250
	1 Downward adjustments	-250
	2 Total adjustments	0

Post the Loyalty Program adjustments using BatchID "DONATION".

