

WELCOME TO THE OPEN LOYALTY PLATFORM!

Congratulations on your new Loyalty Platform. This manual is intended to help you get the most out of your Loyalty program in your day-to-day use.

This guide answers the “why, where, and how” questions that most users have when learning to use Open Loyalty platform. You’ll find lots of step-by-step instructions, screenshots and examples.

Revel Systems offers businesses the ability to customize their loyalty and rewards programs. This feature gives businesses the power to create engaging programs that generate customer loyalty and increase sales. Through this Platform, you can easily manage the rewards and loyalty points to be provided to your customers. Thereafter, the customers can earn or redeem the points as per the rules defined by you.

The screenshot shows the Open Loyalty Platform's dashboard. On the left is a dark sidebar menu with options like Home, Dashboard, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, and Reward campaigns. The main area has several summary boxes: Points spent (1275), Customers (325), Spending (896,254.83 USD), Orders (594), Number of referrals (4), Number of completed references (0), and Number of conversions (0). Below these is a chart titled 'New members' showing a bell-shaped curve of member growth over time from April 1st to April 29th. At the bottom is a table titled 'Levels list' with columns for Name, Description, Condition value, Reward value, Customers, Active status, Special rewards, and Actions. The table lists five levels: G (Not set, 100, 10.00%, 0, Inactive, Not set, checkbox checked), VIP (Customers who spend more than 5000 EUR, 5000, 33.00%, 47, Active, Not set, checkbox checked), Silver (Customers who spend more than 400 EUR, 400, 1.00%, 58, Active, Not set, checkbox checked), Gold (Customers who spend more than 1500 EUR, 1500, 15.00%, 183, Active, Not set, checkbox checked), and Bronze (Starting level, 0, 5.00%, 37, Inactive, Not set, checkbox checked). A note at the bottom says 'Showing 1 up to 5 from 5 entries.'

Name	Description	Condition value	Reward value	Customers	Active	Special rewards	Actions
G	Not set	100	10.00%	0	Inactive	Not set	<input checked="" type="checkbox"/>
VIP	Customers who spend more than 5000 EUR	5000	33.00%	47	Active	Not set	<input checked="" type="checkbox"/>
Silver	Customers who spend more than 400 EUR	400	1.00%	58	Active	Not set	<input checked="" type="checkbox"/>
Gold	Customers who spend more than 1500 EUR	1500	15.00%	183	Active	Not set	<input checked="" type="checkbox"/>
Bronze	Starting level	0	5.00%	37	Inactive	Not set	<input checked="" type="checkbox"/>

Open Loyalty Platform

GETTING STARTED

This section of the guide introduces your Loyalty Platform Admin, and walks you through the basic configuration settings. You'll get an overview of the resources that are available to you as an Admin of the Open Loyalty and how to log into your Admin account. Finally, you'll learn the concepts of loyalty platform and configuration scope, and establish best practices for project standards and requirements.

WELCOME

OPEN LOYALTY ADMIN

Admin Sidebar

Admin Workspace

Dashboard

Grid Controls

Actions Controls

OPEN LOYALTY SETTINGS

Configuration

Template management

Customer statuses

Account activation

Identification factors

Webhooks

Users

Locked users

Translations

Emails

Customizing Email templates

System logs

Search Logs by date range

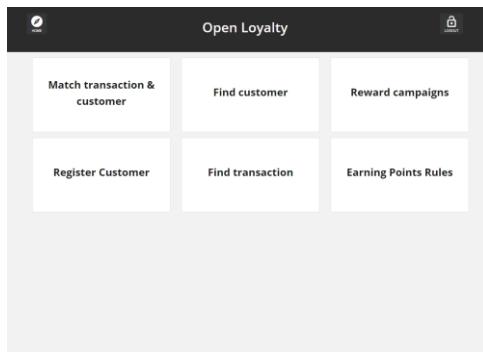
Search/Filter Logs

CHAPTER 1:

WELCOME

An Open Loyalty is technology for loyalty solutions. It's a loyalty platform in open source, with ready-to-use gamification and loyalty features, easy to set up and customize, ready to work on-line and off-line. Open Loyalty is an open source solution that can be easily **integrate with eCommerce** or can be used as a **standalone solution**.

There is variety of applications for Open Loyalty. Based on it you can build loyalty solutions like: loyalty modules for eCommerce, full loyalty programs for off-line and on-line, motivational programs for sales department or customer care programs with mobile application.



POS COCKPIT

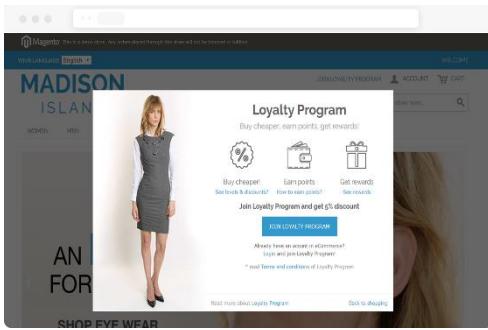
Use the POS Cockpit and run your loyalty app in your off-line stores

ADMIN COCKPIT

Use the Admin Cockpit to manage your loyalty application

CLIENT COCKPIT

Use the Client Cockpit and create a dedicated web portal for your customers



E-COMMERCE COCKPIT

New additional loyalty and gamification features as a seamless part of your webshop

Campaign	Show hide	List Operations	Expand Operations
<code>get % /api/admin/customer/{customer}/campaign/available</code>		List all campaigns that can be bought by this customer.	Buy campaign
<code>post % /api/admin/customer/{customer}/campaign/campaign/buy</code>			Get all campaigns
<code>put % /api/campaign</code>			Create new campaign
<code>get % /api/campaign/campaign</code>			Get single campaign details
<code>put % /api/campaign/campaign/edit</code>			Edit campaign
<code>get % /api/campaign/campaign/customers/visible</code>			Get customers who for whom this campaign is visible
<code>delete % /api/campaign/campaign/photo</code>			Remove photo from campaign
<code>get % /api/campaign/campaign/photo</code>			Get campaign photo
<code>put % /api/campaign/campaign/photo</code>			Add photo to campaign
<code>put % /api/campaign/campaign/process</code>			Charge campaign state after success or failure
<code>get % /api/campaign/campaign</code>			Get all visible campaigns
<code>get % /api/campaign/campaign/visible</code>			Get single campaign details
<code>get % /api/better/customer/{customer}/campaign/available</code>			List all campaigns that can be bought by this customer.
<code>get % /api/better/customer/{customer}/campaign/buy</code>			Buy campaign

Customer	Show hide	List Operations	Expand Operations
<code>get % /api/admin/customer/{customer}/activate</code>			Method used to activate customer
<code>get % /api/admin/customer/{customer}/deactivate</code>			Method used to deactivate customer (from deactivated customer will not be able to log in)
<code>get % /api/admin/customer/{customer}/status</code>			Method will return customer status back

API & CONNECTORS

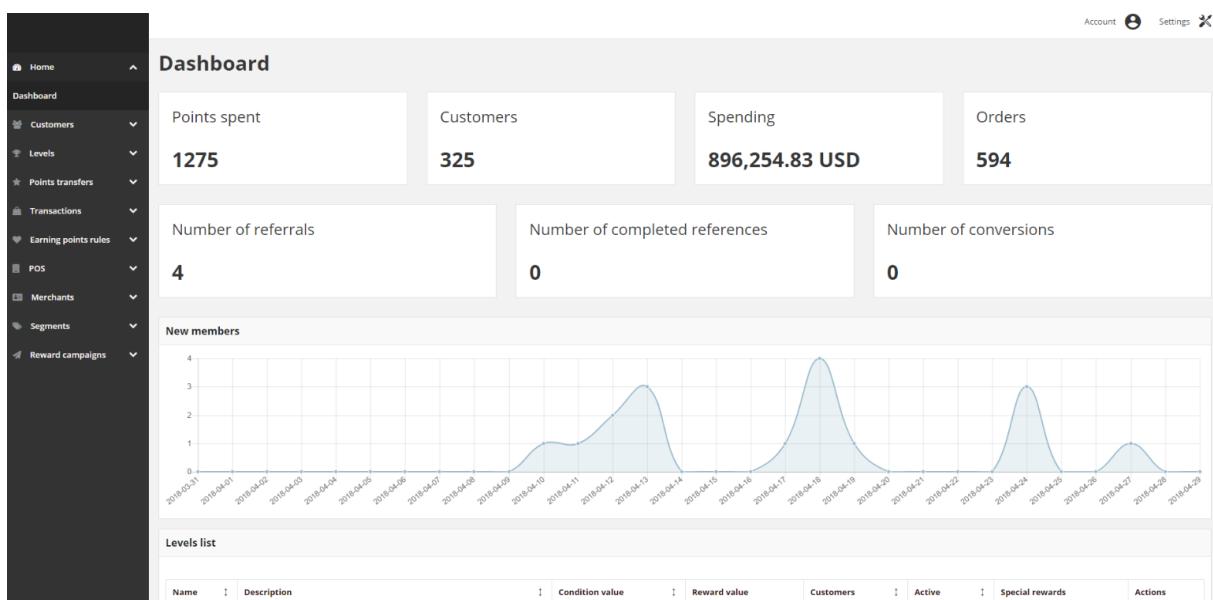
Connect Open Loyalty to eCommerce platforms, ERP systems, mobile applications, or any external system

CHAPTER 2:

OPEN LOYALTY ADMIN

Your store Admin is the password-protected back office where you can set up points rule, reward campaigns, manage customers, and perform other administrative tasks. All basic configuration tasks and loyalty campaign management operations are performed from the Admin.

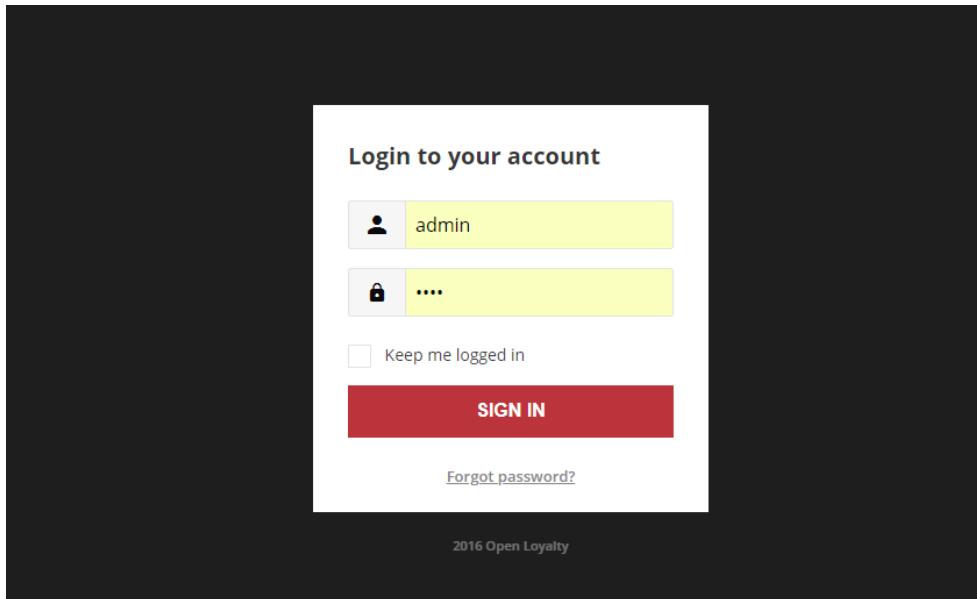
Your initial sign-in credentials were set up during the Open Loyalty installation. If you forget your password, a temporary password can be sent to the email address that is associated with the account



Admin Sidebar and Dashboard

Admin Sign In

The first thing you will learn is how to sign in and out of the Admin, and to reset your password. All of the instructions in the rest of this guide are written for a user with full administrative privileges, and begin with the assumption that you are logged in to the Admin.



Admin Sign In

To sign in to the Admin:

1. In the address bar of your browser, enter the URL that was specified during the installation, followed by the base URL of your store's Admin.
The default Admin URLs look something like this:

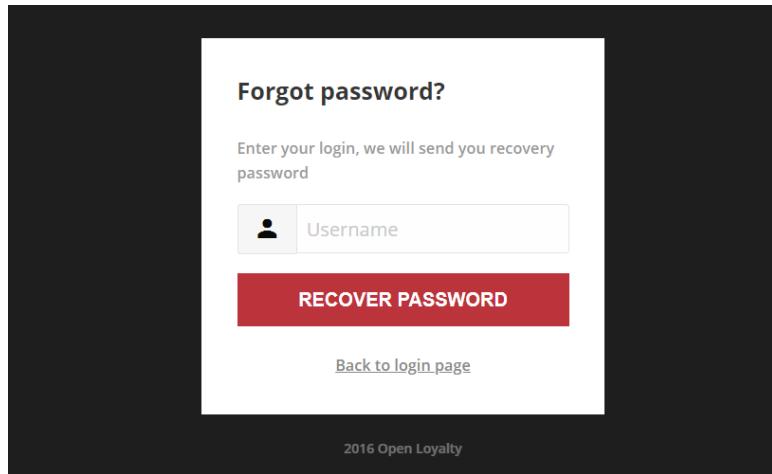
http://www.domain.com/admin

You can bookmark the page or save a shortcut on your desktop for easy access.

2. Enter your Admin **Login** and **Password**
3. If you want to log in automatically every time you open the website without needing to enter your login and password mark **Keep me logged in** checkbox.
4. Tap **Sign in**

To reset your password:

1. If you forget your password, click the **Forgot password?** Link



Forgot Password

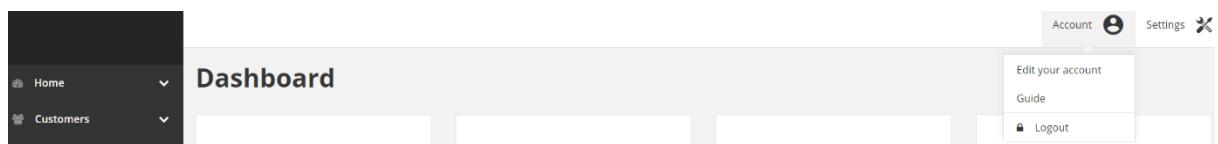
2. Enter the Email Address that is associated with the Admin account
3. Tap **Recover Password**

If an account is associated with the email address, an email with recovery password will be sent to reset your password.

Your Admin password must be eight or more characters long, and contains at least one upper case letters, one numeric character and one special character

To sign out of the Admin:

In the upper-right corner, tab the **Account** (👤) icon. Then on the menu, choose **Logout**.



Logout

When you logout, the Sign-In page returns.

Your Admin Account

Your Admin account was initially set up during the installation. You can personalize your user name and password, and update your first and last name, and email address and phone number at any time.

To edit your account information:

1. In the upper-right corner, tab the **Account** (👤) icon. Then on the menu, choose **Edit your account**
2. Make any necessary changes to your profile information. If you change your password, make sure to write it down.
3. When complete, tap **Save**

The screenshot shows the 'Admin profile' page. On the left is a dark sidebar with a navigation menu. The main area has a header 'Admin profile' and tabs for 'Basic information' and 'Change password'. It contains fields for 'First name', 'Last name', 'Phone', and 'E-mail*' (with 'admin@oloy.com' entered). At the bottom are 'SAVE' and 'CANCEL' buttons. The top right corner shows a user menu with options like 'Edit your account', 'Guide', and 'Logout'.

Admin Profile Information

Admin Sidebar

The sidebar on the left is the main menu for your Loyalty Platform Admin, and is designed for both desktop and mobile devices. The menu provides access to all the tools you need to manage your loyalty programs on a daily basis.

Dashboard

Points spent: 1275

Customers: 325

Spending: 896,254.83 USD

Orders: 594

Number of referrals: 4

Number of completed references: 0

Number of conversions: 0

Levels Bar

Levels List

Name	Description	Condition value	Reward value	Customer	Action	Special rewards	Action
S	Not set	100	gold	0	Red	Grey	Grey
Gold	Customers who spent more than 1000 EUR	5000	gold	47	Red	Grey	Grey
Silver	Customers who spent more than 500 EUR	500	gold	50	Red	Grey	Grey

Dashboard

The Dashboard provides a quick overview of the customers activity in your loyalty programs, and is usually the first page that appears when you log in to the Admin

Customers

ADD CUSTOMERS

List of customers

First name	Last name	Phone	Email	Gender	Birth date	Created at	CUV	AID	Orders	Data from last order	Actions
Eduard	Curt	Not set	spendingcustomer@referrals.net	Male	2010-07-03	2014-02-09	10,196.80 USD	1,066.57 USD	7	52	View
Tony	Mary	+140994021074	test@referrals.org	Female	1968-10-20	2014-10-17	5,555.00 USD	3,176.25 USD	3	521	View
Monique	John	+48711007247	thealthcare@example.net	Male	1991-02-07	2014-12-09	4,875.00 USD	2,008.25 USD	2	40	View
Baron	Mahr	+61780700764	aberry@example.net	Male	1966-08-11	2014-10-08	8,760.00 USD	2,000.00 USD	3	500	View

Referrals

Customers

The Customers menu is where you can manage customer registered in your loyalty programs, and see referred customers list

Levels

ADD LEVELS

Levels Bar

Name	Description	Condition value	Reward name	Reward value	Reward rate	Min order	Comments	Action	Special rewards	Action
S	Not set	100	10% off items	gold	10.00%	Not set	8	Red	Grey	Grey
Gold	Customers who spent more than 5000	5000	20% off for every purchase and additional reward	gold	20.00%	Not set	47	Red	Grey	Grey
Silver	Customers who spent more than 400	400	10% off	gold	1.00%	Not set	50	Red	Grey	Grey
Gold	Customers who spent more than 1000	1000	15% off for every purchase	gold	15.00%	Not set	102	Red	Grey	Grey
Starting level	S	5% off for every purchase	gold	5.00%	100	Not set	37	Red	Grey	Grey

Levels

The levels menu is where you manage and define Customer levels with discounts and rewards.

Points transfers

ADD TRANSFERS

Points transfers list

First name	Last name	Phone	E-mail	Status	Type	Value	Comment	Created at	Loyalty card number	POS	Action
Diamond	Karen	+9057200000	amygd22@example.net	expired	adding	100	Early day	2016-09-02 00:00:00	02-0002	Not set	View
Diane	Nora	Customer	not set	spendingcustomer@referrals.net	expired	adding	2545.3	2016-09-02 00:00:00	01-0001	Not set	View
Arleen	Arleen	1111	spendingcustomer@referrals.net	expired	adding	50.74		2016-09-02 00:00:00	01-0001	Not set	View
John	Eve	11111	wwwday.com	expired	adding	5400		2016-09-02 00:00:00	01-0001	Not set	View
John	Eve	11111	wwwday.com	expired	adding	100	My first	2016-09-02 00:00:00	01-0001	Not set	View
customer	evaPOSS	not set	postmail@	cancelled	adding	100	For purchases	2016-04-29 10:10:00	01-0001	Not set	View
John	Eve	11111	wwwday.com	active	spending	20	Free delivery, expires 4	22-10-20	01-0001	Not set	View

Points Transfers

The Points Transfer menu includes tools to controls everything related to your points transfer operation

Transactions								
VIEW WITH CUSTOMERS								
Transactions list								
Document number	Loyalty card number	E-mail	Phone	Document type	Purchase date	PIS	Amount	Actions
670190217017	02000002	duncan@lifemastersthess.org	+02734804218	Sell	2016-11-10 16:00	Off-line store 1	250 USD	
090203020201	01000001	Reinhard@sample.org	+02734805762	Sell	2016-03-10 14:00	Off-line store 1	340 USD	
500704020100	72400001	dysphonia@sample.net	+02734800001	Sell	2016-02-22 22:00	Off-line store 1	1700 USD	
100274019001	01000001	anderson@sample.com	+02734802003	Sell	2016-11-17 23:00	Off-line store 1	620 USD	
100274019002	74000001	markus@sample.net	+02734801001	Sell	2016-02-12 23:00	Off-line store 1	1270 USD	
200274019003	74000002	mariella@sample.net	+02734801001	Sell	2016-02-10 09:00	eCommerce 2	240 USD	
200274019004	22000001	reid@sample.org	+02734801001	Sell	2016-11-10 09:00	eCommerce 2	400 USD	
002403020202	32216011	reid@sample.org	+02734802003	Sell	2016-11-10 09:00	eCommerce 2	400 USD	
100274019005	22448076	leif@sample@sample.org	+02734800001	Sell	2016-02-08 08:00	Off-line store 1	140 USD	
302504020009	85000001	halilah@sample@sample.org	+02734800001	Sell	2016-11-20 22:00	Off-line store 1	250 USD	
400205020102	70120001	monica@sample@sample.com	+02734800002	Sell	2016-11-10 08:00	Off-line store 1	250 USD	

Transactions

The Transaction menu provides an overview of all data on offline and online transactions registered on customers

Earning points rules								
ADD EARNING POINTS RULE								
Earning points rules list								
Name	Description	Active	Start at	End at	Type	Actions		
1 EUR = 1 point	Customers earn 1 point after spending 1 EUR for purchases registered in loyalty program		Is all time active	Is all time active	General spending rule			
0 points for purchasing promotional products	Customer earns 0 points for purchasing promotional products		Is all time active	Is all time active	Product purchase			
0 points for purchasing sales products	Customer gather 0 points for buying sales products		2016-01-19 00:00:00	2016-02-28 23:59:59	Product purchase			
Additional points for shopping via Black Friday	Customers earn 1 additional point after spending 1 EUR for purchases registered in loyalty program during Black Friday		2016-12-01 00:00:00	2016-12-02 23:59:59	General spending rule			
Customer Get 1.5 For Each Dollar	Customer Get 1.5 For Each Dollar		Is all time active	Is all time active	General spending rule			
Multiplying points for purchasing specific product	Customers earn 2x points after purchasing product right@0001		Is all time active	Is all time active	Multiplying reward points			

Earning Points Rules

The Earning Points Rules menu is where you set up rules for earning points based on transactions and behavior of Customers

POS								
ADD POS								
POS list								
Name	Description	Identifier	Localization	Transactions value	Transactions count	Actions		
eCommerce 2	Sample on-line POS	eCommerce2	Gly	450000 USD	207			
Off-line store 1	Simple POS	pos1	Gly	450000 USD	308			
Off-line store 2	Sample POS	pos2_1	Gly	0 USD	0			
eCommerce 1	Sample POS	us_order_1	Gly	2014230 USD	7			

POS

The POS menu controls data related to your online and offline stores including localization and customers transaction values that were processed in POS.

Merchants								
ADD MERCHANT								
Merchants list								
First name	Last name	Phone	E-mail	POS ID	POS name	POS city	Active	Actions
Alice	Williams	4567890	alice.williams@gmail.com	0000000000-4761-1111-000000000002	Off-line store 1	Gly		
Bill	Hoyer	543210987	bill.hoyer@gmail.com	0000000000-4761-1111-000000000002	Off-line store 1	Gly		
John	Doe	1234567890	john.doe@gmail.com	0000000000-4761-1111-000000000002	Off-line store 2	Gly		

Merchants

The Merchants menu is where you can manage merchants and assigned them to particular POS.

Segments								
ADD SEGMENT								
Segments list								
Name	Created at	Description	Customers	Active	Actions			
Adds Lovers	2016-09-09 16:00	Not set	0					
Bg speakers	2016-01-01 10:00	Customers with ID between 1000 and 2000	97					
Birthday anniversary	2016-01-01 10:00	Show customers who have 10 days to birthday	7					
Black Friday off-line customers	2016-01-01 10:00	Customers who bought something during Black Friday off-line stores	6					
Christmas gift shoppers	2016-01-01 10:00	Customers who bought products with label 'For Christmas present'	8					
Customers loyal to 7 for All Market	2016-01-01 10:00	Customers buying products of 7 for All Market	100					
Customers who bought specific products	2016-01-01 10:00	Customer who bought products with with ID equal 0001, 0002, 0003	8					
Customers with ADV	2016-01-01 10:00	Customer with ADV between 500 and 600	10					
Customer with Total POS	2016-01-01 10:00	All customers having a Total POS, and with a transaction amount range, will fit.	8					
Custom Segment from R	2016-01-01 10:00	This segment was made via API with customJSON	211					
Geo	2016-01-01 10:00	Not set	211					

Segments

The Segments menu is where you create customer segments based on customer transactions or behavior

Name	Active	Campaign type	Expire in period	Limit	Lives per customer	Used by customers	Coupons issued	Active from	Active to	Customers
GR for birthday anniversary	Active	Gift	5	Unlimited	Unlimited	0	5	Is all time active	Is all time active	7
GR for AGD coupon to use in off-line store	Active	Value code	30	Unlimited	Unlimited	1	5	Is all time active	Is all time active	325
Discount code reward	Active	Discount code	20	10	1	1	10	Is all time active	Is all time active	325
Invitation for the event	Active	Invitation for the event	100	5	1	1	5	Is all time active	Is all time active	325
Exclusive gift for Gold level only	Active	Gift	300	5	1	1	5	Is all time active	Is all time active	182
GR for new members	Active	Gift	5	5	1	1	5	Is all time active	Is all time active	325
GR for registration anniversary	Active	Free delivery	0	Unlimited	Unlimited	0	5	Is all time	Is all time	7

Reward Campaigns

The Reward Campaign menu is where you manage rewards available in your loyalty application, decide who can redeem rewards, and when

Admin Workspace

The Admin workspace provides access to all the tools, data, and content that you need to run your loyalty platform. The main pages have a grid that lists the data for the section, with a set of tools to search, sort, filter, select, and apply actions.

The screenshot shows the 'Customers' section of the Admin Workspace. On the left is a dark sidebar with a navigation menu. The main area has a header 'Customers' with a 'ADD CUSTOMER' button. Below is a table titled 'List of customers' with columns: First name, Last name, Phone, E-mail, Gender, Birth date, Created at, CLV, AVO, Orders, Days from last order, and Actions. A red box highlights the 'Sort' button in the header. Another red box highlights the 'Search/Filter' input field in the first row. A third red box highlights the 'Actions' dropdown menu next to a specific row. At the bottom, a red box highlights the 'Pagination' controls.

First name	Last name	Phone	E-mail	Gender	Birth date	Created at	CLV	AVO	Orders	Days from last order	Actions
David	Cust	openloyalcustomer@arfeen.me	male	2018-07-03	2018-07-06-29	10,196.00 USD	1,456.57 USD	7	52		
Tony	Metz	+7488964631574	leola05@example.org	female	1968-10-25	2016-10-14 17:55	9,535.00 USD	3,178.33 USD	3	521	
Monique	Johns	+8874110672247	theathcote@example.net	male	1961-02-27	2018-02-03 10:38	8,815.00 USD	2,938.33 USD	3	70	
Stefan	Mohr	+6670607859754	abbey48@example.net	male	1986-06-17	2016-12-06 16:26	8,760.00 USD	2,920.00 USD	3	509	

Admin Workspace

Workspace Controls

CONTROL	DESCRIPTION
Search / Filter	The filters in the header of each column can be used to limit the list to specific values. You can simply type the value you want to find and press Enter
Sort	The header of each column can be used to sort the list in ascending or descending order
Paginate	The pagination controls are used to view the additional pages of results
Actions	The Actions control applies an operation to selected record

Dashboard

The dashboard is the default startup page for the Admin – the first page that appears when you log in to the Admin. Dashboard gives an overview of the customers activity in your loyalty programs.

The blocks at the top of the page provide a snapshot of:

- Number of all spent points
- Number of all customer accounts
- Total amount of all registered transaction
- Number of all registered transactions

Blocks below, show some factors describing current state of referral program:

- Number of all invitations send by customers
- Number of all customers that register an account from invitation link
- Number of all customers that make purchase after register an account from invitation link

The chart shows the number of new customer accounts in time line. You can view the amount of member by hover your mouse over any day.

The tabs at the bottom provide quick overview of your Customer Levels list, associated to various benefits such as discounted fees and credentials for customer to reach this value. To learn more about customer Levels, see **Levels**

The screenshot shows the Admin Dashboard with the following sections:

- Left Sidebar:** A navigation menu with categories like Home, Dashboard, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, and Reward campaigns.
- Top Metrics:** Four large boxes showing: Points spent (1275), Customers (325), Spending (896,254.83 USD), and Orders (594).
- Middle Metrics:** Three smaller boxes showing: Number of referrals (4), Number of completed references (0), and Number of conversions (0).
- Chart:** A line chart titled "New members" showing the daily count of new customer accounts. The x-axis represents dates from 2018-03-31 to 2018-04-29. The y-axis ranges from 0 to 4. The chart shows several peaks, notably around April 11, 14, 23, and 26.
- Customer Levels List:** A table titled "Levels list" showing three levels: G (Not set), VIP (Customers who spend more than 5000 EUR), and Silver (Customers who spend more than 400 EUR). The table includes columns for Name, Description, Condition value, Reward value, Customers, Active status, Special rewards, and Actions.

Dashboard

Grid Controls

Admin pages that manage data display a collection of records in a grid. The controls at the top of each column can be used to sort the data. The current sort order is indicated by an ascending or descending arrow in the column header. The Action column lists operations that can be applied to an individual record.

The screenshot shows a mobile application interface for managing customer data. On the left is a dark sidebar menu with various navigation items like Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, and Reward campaigns. The main screen is titled "Customers" with a red "ADD CUSTOMER" button. Below the title is a section labeled "List of customers". A table displays four rows of customer data:

First name	Last name	Phone	E-mail	Gender	Birth date	Created at	CLV	AVO	Orders	Days from last order	Actions		
David	Cust	Not set	openloyalcustomer@arfeen.me	male	2018-07-03	2018-03-07 06:29	10,196.00 USD	1,456.57 USD	7	52			
Tony	Metz	+7488964631574	leola05@example.org	female	1968-10-25	2016-10-14 17:55	9,535.00 USD	3,178.33 USD	3	521			
Monique	Johns	+8874110672247	theathcote@example.net	male	1961-02-27	2018-02-03 10:38	8,815.00 USD	2,938.33 USD	3	70			
Stefan	Mohr	+6670607859754	abbey48@example.net	male	1986-06-17	2016-12-06 16:26	8,760.00 USD	2,920.00 USD	3	509			

Showing 1 up to 20 from 325 entries. ...

Customer Grid

To sort the list:

1. Tap any column header. The arrow indicates the current order as either ascending or descending.
2. Use the pagination controls to view additional pages in the collection.

To paginate the list:

1. Tap **Next** and **Previous** to page through the list, or click a specific **Page Number**.

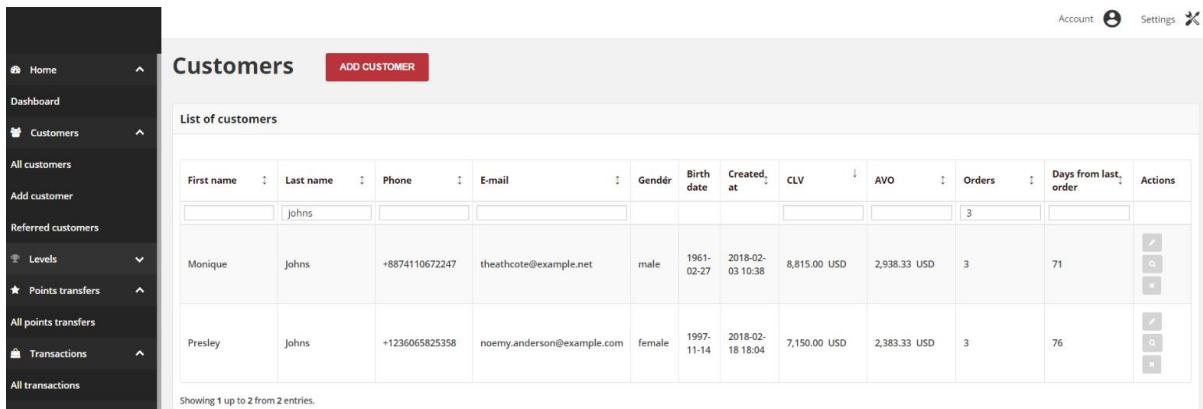


Pagination options

To search the list:

1. In the selected column in the field under column header type the value you want to find
 - To find a close match, enter the few letters/signs of what you want to find
 - To find an exact match, enter the exact word/number you want to find.

2. You can put as many values under different columns headers as needed to describe the conditions that must be met for the search result. Search values from each column create an AND Condition rule. It means that in search results only records matching all entered values are displayed.



The screenshot shows a user interface for managing customers. On the left is a dark sidebar with navigation links: Home, Dashboard, Customers (selected), All customers, Add customer, Referred customers, Levels, Points transfers, All points transfers, Transactions, and All transactions. The main area has a header 'Customers' with a red 'ADD CUSTOMER' button. Below it is a table titled 'List of customers' with a search bar containing 'johns'. The table has columns: First name, Last name, Phone, E-mail, Gender, Birth date, Created at, CLV, AVO, Orders, Days from last order, and Actions. Two rows are shown: one for Monique Johns and one for Presley Johns. At the bottom, it says 'Showing 1 up to 2 from 2 entries.'

First name	Last name	Phone	E-mail	Gender	Birth date	Created at	CLV	AVO	Orders	Days from last order	Actions
	johns								3		
Monique	Johns	+8874110672247	theathcote@example.net	male	1961-02-27	2018-02-03 10:38	8,815.00 USD	2,938.33 USD	3	71	
Presley	Johns	+1236065825358	noemy.anderson@example.com	female	1997-11-14	2018-02-18 10:04	7,150.00 USD	2,383.33 USD	3	76	

Showing 1 up to 2 from 2 entries.

Customer search controls

Actions Controls

When working with a collection of records in the grid, you can use the **Actions** control to apply an operation to the records. The Actions control lists each operation that is available for the specific type of data. For example, for Customer records, you can use the Actions control to edit basic information of selected customer, view the customer account form, or to deactivate record without possibility to activate them again.

The screenshot shows a user interface for managing customers. On the left is a sidebar with navigation links: Home, Dashboard, Customers (selected), All customers, Add customer, Referred customers, Levels, Points transfers, Transactions, and Earning points rules. The main area is titled 'Customers' with a 'List of customers' header and a red 'ADD CUSTOMER' button. Below is a grid table with columns: First name, Last name, Phone, E-mail, Gender, Birth date, Created at, CLV, AVO, Orders, Days from last order, and Actions. Two rows of customer data are shown: Abel Hoppe and Addie Jenkins. Each row has an 'Actions' button in the last column containing icons for edit, view, and delete.

Applying an Action to selected record

Actions by Grid

MENU	LIST	ACTIONS
CUSTOMERS	All Customers	Edit customer View Customer Account form Deactivate customer
LEVELS	All Levels	Edit level Export customer to CSV
POINTS TRANSFER	All points transfers	Delete transfer
TRANSACTIONS	All transactions	View Transaction details
EARNING POINTS RULE	All earning points rule	View earning rule details Edit points rule
POS	All POS	

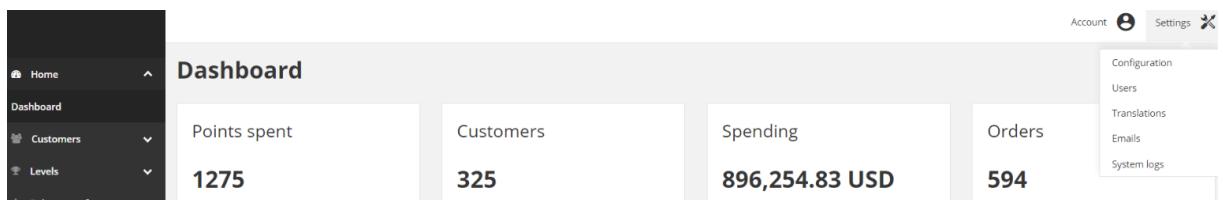
		Edit POS
MERCHANTS		
	All merchants	Remove merchant account Edit Merchant
SEGMENTS		
	All segments	Delete selected segment Edit segment Export customer to CSV
REWARD CAMPAIGNS		
	All reward campaigns	Edit reward campaign View campaign details

CHAPTER 3:

OPEN LOYALTY SETTINGS

The high level settings for the Admin management of your Loyalty Platform includes five areas that can be configured to enable and customize your activity.

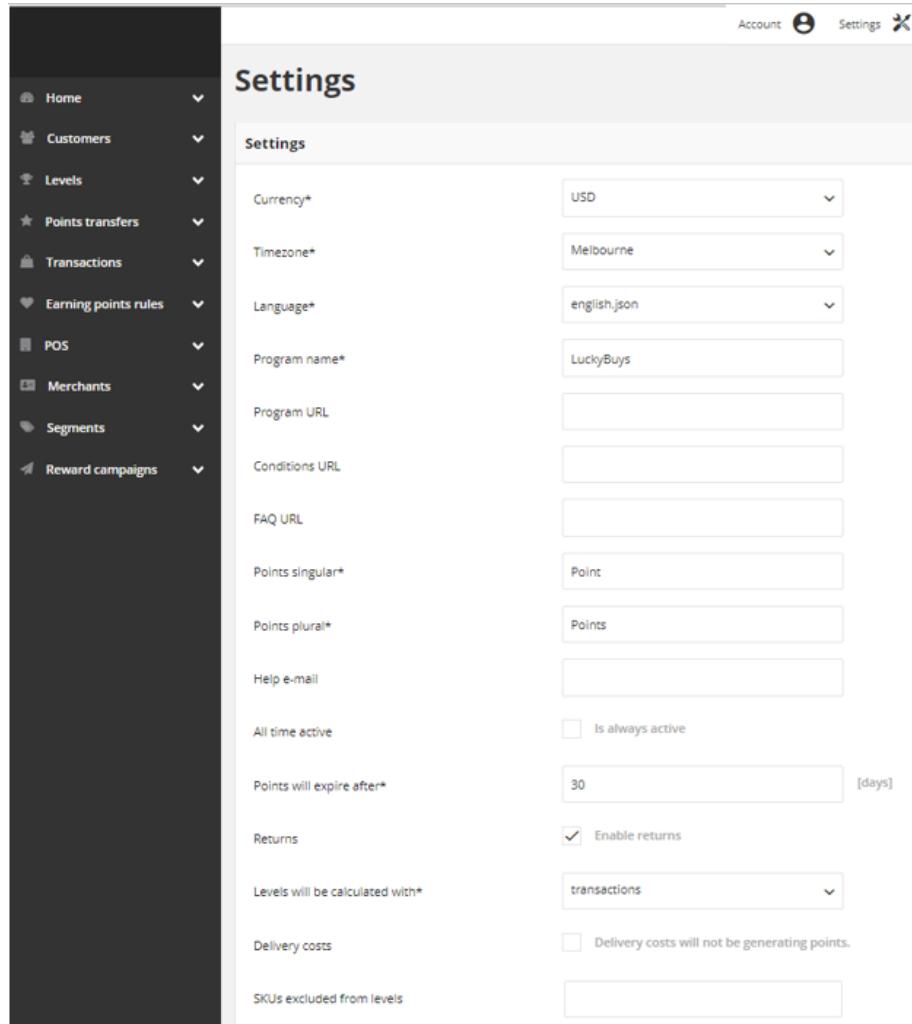
- **Configuration** - basic settings of loyalty platforms elements including loyalty programs behavior
- **Users** - detailed information about Open Loyalty users and theirs account settings
- **Translations** - available languages list with the editing possibility
- **Emails** - events list that send email from Open Loyalty system and theirs preview.
- **System logs** - informational, error and warning events list related to the Open Loyalty system



Open Loyalty Settings

Configuration

The Configuration section determines loyalty program and points details, customer earning and spending statuses, account activation, identification factors of matching transaction with customer and other settings that are used throughout the Open Loyalty system.



Open Loyalty Settings

To configure Open Loyalty:

1. In the upper-right corner, tab the **Settings** () icon. Then on the menu, choose **Configuration**
2. In the **Settings** section, do the following:
 - a. In the **Currency** list, select the currency that you use for online and offline transaction
 - b. Select your **Timezone** from the list. Time zone is used for date time calculation

- c. In the **Language list**, select Language that you use throughout the Open Loyalty
- d. Enter the **Program name** that you want to use in all communications
- e. If applicable, enter the URLs to the following:

Program URL	URL to page with Loyalty Program description
Conditions URL	URL to page with Loyalty Program Terms & Conditions description in pdf, accessible to download from the customer login page. that will be also attached as a link in the Welcome system e-mails footer. For more information please see system Emails
FAQ URL	URL to page with Loyalty Program FAQ page

- f. In **Points singular** and **Points plural**, type a unit label of scoring in singular and plural, that you want to appear. For example: Point, Points
- g. Set **Help e-mail**, where customer can write to find help and support for your Loyalty Program.
- h. Mark the **All time active** checkbox, if you want the points accumulated by the participants of your loyalty program don't expire.
- i. **Points will expire after** field is available and required only when **All time active checkbox** is unselected. Points will expire after provided number of days from date of adding Point transfer.
- j. If you marked **Enable returns** checkbox, then after Return process completed amount of points earned for returned transaction will be subtracted.
- k. Set the **Levels will be calculated with** field to one of the following:

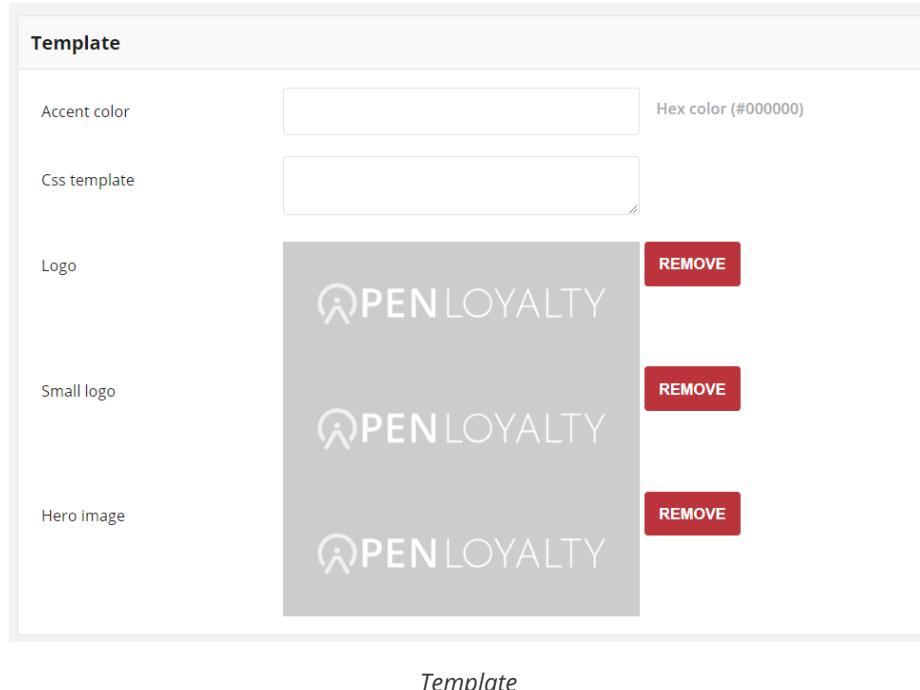
Points	current level assignment will be calculated on the basis of sum of points earned from transactions (with use of earning rules)
Transactions	current level assignment will be calculated on the basis of the summary value of all transactions

- l. When **Delivery costs** checkbox is selected then delivery cost will not be included in order value used for earned points calculation.
- m. **Excluded SKUs of delivery cost** field is available and required only when **Delivery costs** checkbox is selected. SKU's provided in this field will be excluded from calculation of earned points.
- n. In the **SKUs excluded from levels** enter SKUs that will not be included in order value used for earned points calculation.

3. When complete, tap **Save**

Template management

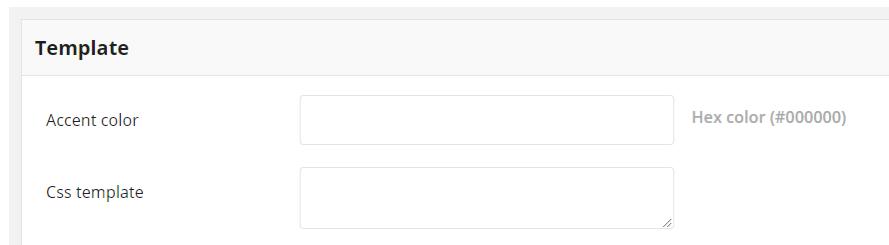
Template management determines the logo, as well as the other content elements e.g. fonts, headers, colors, that are used for all pages within Open Loyalty.



The content is formatted with CSS, and can be easily edited and customized by adding variables and other content element. You can make a color theme on the frontend using your primary color (Accent color).

To customize your template:

1. In the upper-right corner, tab the **Settings** (⚙️) icon. Then on the menu, choose **Configuration**
2. Scroll down to **Template** section and do the following:

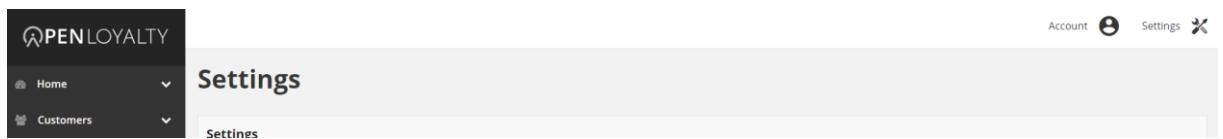


- a. In **Accent color**, define your primary color indicator. Accent color is the color displayed most frequently across your Loyalty Program screens and components. Only Hexadecimal color values are supported.

- b.** In the **CSS template** box, enter the CSS code as needed. The content consists of a combination of CSS directives, variables and text.

One of the first things you'll want to do is to change the logo in the header above the menu. Your logo can be saved as either a **PNG, JPG, or JPEG** file type, and uploaded from the Admin of your Open Loyalty. The default Open Loyalty logo in the sample data is an PNG file.

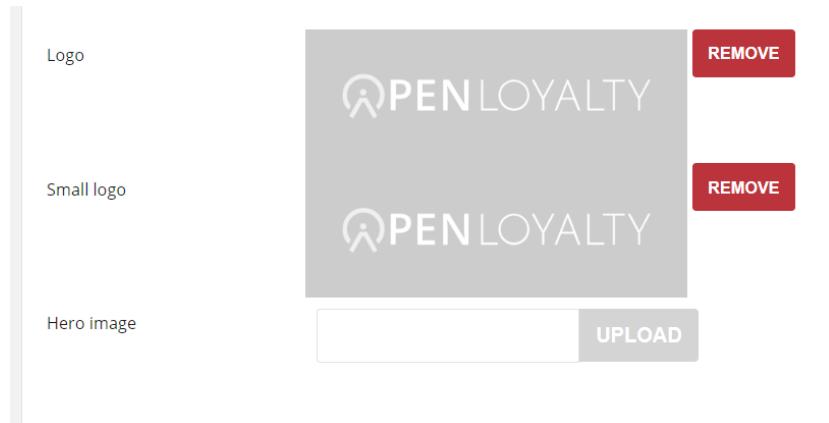
In addition, you can also add an oversized banner image, called **Hero image**, that will be placed on a login page. Hero image is the first visual element a customer's encounters on your site.



Logo in Header Menu

To upload your logo:

- 1.** In the upper-right corner, tab the **Settings** (X) icon. Then on the menu, choose **Configuration**
- 2.** Scroll down to **Template** section and tap **Upload** on selected fields to do the following:



Logo Updating

- a.** In **Logo** field, to import logo image that will be displayed on desktop version. Then choose the file from your computer.
- b.** In **Small logo** field, to import logo image that will be displayed on mobile version. Then choose the file from your computer.
- c.** In **Hero image** field, to import image that will be displayed as a banner on login page.

3. When complete, tap **Save**

You can simply remove uploaded logo by taping **Remove**

Image Roles

FIELD	DESCRIPTION
Logo	Main logo image in the Admin cockpit placed in the header above the menu. Image is display on desktop version of application.
Small logo	Small logo image in the Admin cockpit placed in the header above the menu. Small image is display on mobile version of application
Hero image	Large web banner image placed on a login page in the front. Hero image is the first visual element a customer's encounters on the site and display on mobile and desktop version.

Images sizing and formats

- The minimum and maximum image width is between 200-2560 pixels
- The minimum and maximum image height is between 200 – 1440 pixels
- The size of any one image must not exceed 2 MB
- Supported image formats: JPEG, JPG, PNG

Customer statuses

The Customer statuses section allows to specify to which customers with particular status, points transfer can be handled. Specify the customer statuses which determines adding and subtracting loyalty points.

Customer earning and spending statuses

Customer earning statuses*

active X blocked X new X

Customer spending statuses*

active X deleted X

blocked

new

Customer Statuses

To assigned a status:

1. In the upper-right corner, tab the **Settings** (⚙) icon. Then on the menu, choose **Configuration**
2. Scroll down to **Customer earning and spending** statuses section.
3. Set the **Customer earning statuses** field to one of the following:

New	Customer create an account in your Loyalty Program, but didn't activate it. To learn more about account activation, see: Account activation
Active	Customer create and activate an account in your Loyalty Program
Blocked	Customer is temporary inactive
Deleted	Customer has been removed

If the **Customer earning statuses** field remain blank, i.e. no status will be assigned, loyalty points will not be charged to any Customer.

4. Set the **Customer spending statuses** field to one of the following

New	Customer create an account in your Loyalty Program, but didn't activate it. Customer is displaying in Customer grid from the Admin cockpit as a grayed-out. To learn more about account activation, see: Account activation
Active	Customer create and activate an account in your Loyalty Program. Customer is displaying in Customer grid from the Admin cockpit.

Blocked	Customer is temporary inactive
Deleted	Customer has been removed

If the **Customer spending statuses** field remain blank, i.e. no status will be assigned, any customer will be able to spend loyalty points.

- When complete, tap **Save**

Account activation

In order to use Open Loyalty Client cockpit, your customers must first activate their customer account. In Account activation section you set the method how their accounts will be activated – by clicking link in welcome email or by code received via SMS.

The screenshot shows a configuration interface for account activation. At the top, it says 'account_activation'. Below that, there is a dropdown menu labeled 'Account activation method*' with the option 'email' selected. There is also a small downward arrow icon next to the dropdown.

Account Activation Method

To set up account activation method:

- In the upper-right corner, tab the **Settings** (⚙) icon. Then on the menu, choose **Configuration**
- Scroll down to **Account activation** section.
- Set the **Account activation method** field to one of the following:

email	account will be activated after clicking on activation link sent to email address
SMS	account will be activated after entering a verification code sent to phone number. The Verification PIN is valid for 30 minutes

- When complete, tap **Save**

Identification factors

The identification factors determines the priority of factors used to match particular transaction with particular customer. Otherwise, these information are used to assign your loyalty program participant with transaction they making and transmitting relevant transaction data to Open Loyalty for completing or validating redemption-related transactions or rewards, calculating associated rewards or identifying transaction matches.

Matching transaction with customer

Priority*	Field*
1	email
2	loyaltyCardNumber
3	phone

SAVE CANCEL ADD IDENTIFICATION FACTOR

Identification factors

To set up identification:

1. In the upper-right corner, tab the **Settings** (🔧) icon. Then on the menu, choose **Configuration**
2. Scroll down to **Matching transaction with customer** section. Fields in this section are used to prioritize which of factors will be taken first to calculate transaction to customer assignment.

Matching transaction with customer

Priority*	Field*
1	email
2	loyaltyCardNumber
3	phone

SAVE

Matching Factors with Priority

- 3.** The **Priority** field determines the order in which the calculation will be handled. Enter a number to determine the Priority of this factor in relation to other factors that might be active at the same time (number 1 has the highest priority)

For example, if there are three factors, with a priority of one, two, and three, the one with the highest priority (number one) is calculated before the others. If there will be no clear result, factor with the second highest priority is verified etc.

- 4.** Set the **Field** to one of the following:

email	when matching transaction with the Customer email will be used (e.g. email provided in Loyalty Program and eCommerce must be the same)
loyalty card number	when matching transaction with the Customer loyalty card number will be used (e.g. Loyalty Card Number must be added to eCommerce account)
phone	when matching transaction with the Customer phone number will be used (e.g. phone number must be provided during account in Loyalty Program creation)

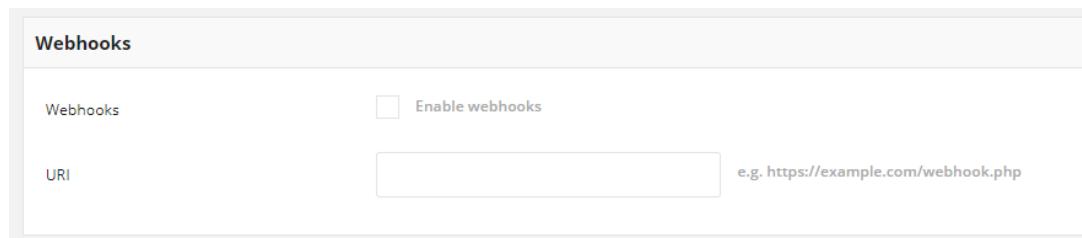
- 5.** You can simply remove factor rule by clicking bin () icon in a particular row.

- 6.** When complete, tap **Save**

Webhooks

Webhooks is a mechanism allowing to send HTTP requests to the URL configured by Admin, triggered by some event, such us customer registration, transaction created, customer data edit etc. There is no need to be a request initiated on your end, data is sent whenever there's new data available.

To setup a webhook all you have to do is register a URL with the company proving the service you're requesting data from. That URL will accept data and can activate a workflow to turn the data into something useful.



The screenshot shows a configuration interface for 'Webhooks'. At the top, there is a section labeled 'Webhooks' with a checkbox labeled 'Enable webhooks'. Below this, there is a field labeled 'URI' with a placeholder text 'e.g. https://example.com/webhook.php'.

Webhooks Enable Option

To enable Webhook:

1. In the In the upper-right corner, tab the **Settings** (⚙️) icon. Then on the menu, choose **Configuration**
2. Scroll down to **Webhooks** section, and to enable mechanism do the following:
 - a. In **Webhooks** field mark **Enable webhooks** checkbox
 - b. Enter configured **URL** address on which request will be sent
3. When complete, tap **Save**

Users

When your store is first set up, you receive a set of login credentials for the Administrator role that has full permissions. If there are others on your team, or service providers who need access, you can create a separate user account for each from this section.

Users list include both active and inactive Admin user's – inactive are grayed-out. You can also see their status in Active column. Additionally Users list grid provides basic information about users – name, surname, email address and authenticate method.

Name	Surname	E-mail	Active	External	Actions
Mark	Ginsberg	admin2@oloy.com	Yes	No	<input checked="" type="checkbox"/>
John	Smith	test@mail.com	No	Yes	<input type="checkbox"/>
Chiara	Giani	admin@oloy.com	Yes	No	<input checked="" type="checkbox"/>

All Users

To add new user:

1. In the upper-right corner, tab the **Settings** (⚙️) icon. Then on the menu, choose **Users**.
2. To add new user, tap **Add**

Name	Mark
Surname	Ginsberg
Active	Active
Phone	
E-mail*	admin2@oloy.com
External	<input type="checkbox"/>
Password*	

New User Account Information

3. In the **Create user** section, complete the following information:

- Name
- Surname
- Phone
- E-mail

This email address must be different from the one that is associated with your original Admin account.

4. Then you have to decide which of following user authenticate method to choose:

a. To authenticate user via an API key, do the following:

- Mark checkbox **External**
- Enter an **API key**, received from Open Loyalty provider

In this case, you will authenticate the user and store that authentication in the session so that the user is automatically logged in for every subsequent request.

b. To authenticate user via Password, do the following:

- Leave **External** checkbox blank
- Assign a **Password** to the account.

5. Set **Active** field to "Active"

6. When complete, tap **Save**

Locked users

Any user account that is currently inactive appears in the Users list as grayed-out. An account can be unlocked (set to active) by other Admin user.

The screenshot shows the 'Edit user' page. On the left is a dark sidebar with a tree-like menu: Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, and Reward campaigns. The 'Customers' node is expanded. The main area has a title 'Edit user' and a sub-section 'Editing user'. It contains the following fields:

- Name: Mark
- Surname: Ginsberg
- Active: Active (selected)
- Phone: (empty input field)
- E-mail*: admin2@oloy.com
- External: (unchecked checkbox)
- Password*: (empty input field)

At the bottom are two buttons: a red 'SAVE' button and a grey 'CANCEL' button. The top right corner has 'Account' and 'Settings' links.

Admin User Editing

To edit an admin account:

1. In the upper-right corner, tab the **Settings** () icon. Then on the menu, choose **Users**.
2. In the Users list, find the record to be edited and click **Edit** () icon in the Action column to open the record in edit mode.
3. Make any necessary changes to user account information. If you change password/API key, make sure to inform user about changes
4. When complete, tap  **Save**

To lock/unlock an admin account:

1. In the upper-right corner, tab the **Settings** () icon. Then on the menu, choose **Users**.
2. In the Users list, find the record to be edited, and click **Edit** () icon in the Action column to open the record in edit mode
3. Set **Active** field, to one of the following:

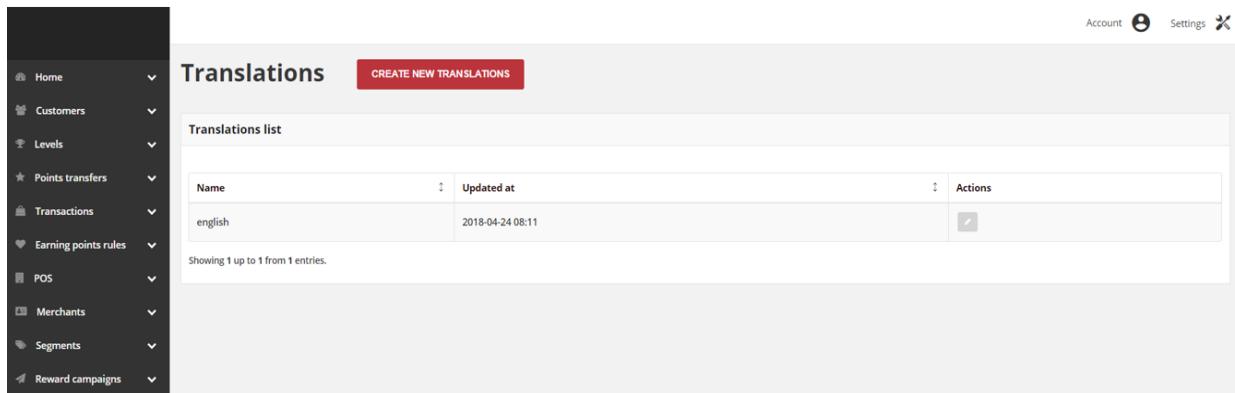
Active	to unlock admin account. User can log in and have access to the Open Loyalty platform.
Inactive	To lock an admin account. User will not be able to log in and have access to the Open Loyalty platform.

Admin users can not be deleted from Open Loyalty platform. To prevent any user from access to the platform, set the Active field as Inactive.

Translations

The Translations determines the language that is used throughout the Open Loyalty. All content elements will appear in the selected language.

Most of the content elements that appear to be hard-coded on pages throughout your Open Loyalty platform can be instantly changed to a different language by adding translation. Translation form provides the interface text that is used throughout the platform. The content can be changed includes navigational titles, labels, buttons, and links such as "List of customers" and "Account."

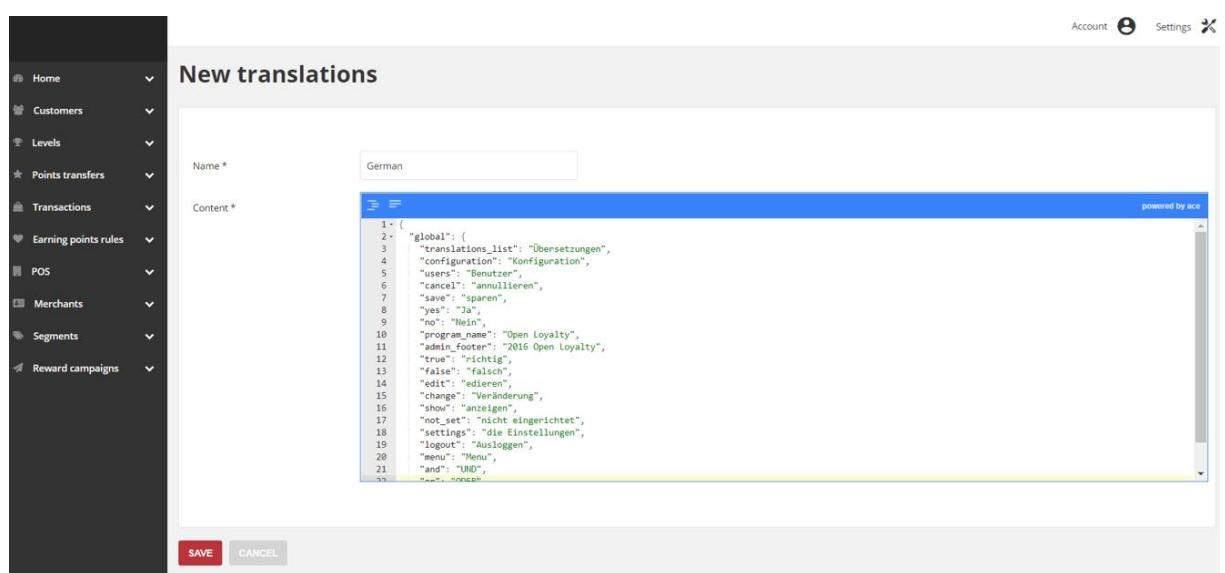


The screenshot shows the 'Translations' list page. On the left is a sidebar with navigation items like Home, Customers, Levels, etc. The main area has a title 'Translations' with a 'CREATE NEW TRANSLATIONS' button. Below is a table titled 'Translations list' with columns Name, Updated at, and Actions. One entry is shown: 'english' updated on 2018-04-24 08:11. A note below says 'Showing 1 up to 1 from 1 entries.'

Translations Lists

To add new translation:

1. In the upper-right corner, tab the **Settings** (gear icon) icon. Then on the menu, choose **Translations**.
2. To add new translation, tap **Create new translations**



The screenshot shows the 'New translations' form. It has a sidebar with navigation items. The main area has a title 'New translations'. It shows a table with 'Name *' (German) and 'Content *' (a large text area containing JSON code). The JSON code is as follows:

```
1 - ( "global": {  
2 -   "translations_list": "Übersetzungen",  
3 -   "configuration": "Konfiguration",  
4 -   "users": "Benutzer",  
5 -   "cancel": "Abbrechen",  
6 -   "save": "speichern",  
7 -   "yes": "Ja",  
8 -   "no": "Nein",  
9 -   "program_name": "Open Loyalty",  
10 -  "admin_footer": "2016 Open Loyalty",  
11 -  "true": "richtig",  
12 -  "false": "falsch",  
13 -  "edit": "edieren",  
14 -  "change": "Veränderung",  
15 -  "not_set": "nicht eingestellt",  
16 -  "settings": "die Einstellungen",  
17 -  "logout": "Ausloggen",  
18 -  "menu": "Menü",  
19 -  "and": "UND",  
20 -  "...": "...",  
21 -  "...": "...",  
22 - } )
```

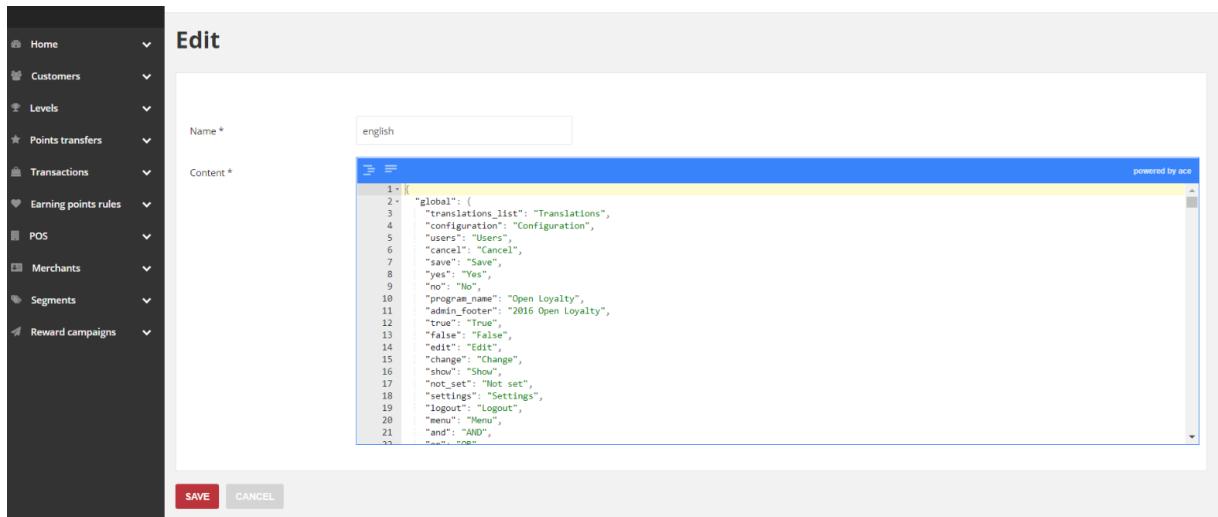
At the bottom are 'SAVE' and 'CANCEL' buttons.

New Translations Form

3. Enter a **Name** for the translations. For example: German
 4. In **Content** field, for each text to be edited either paste or type the translated text into the field. Translated text is marked in green.
- Text in editor must be valid JSON.
5. When complete, tap **Save**
 6. Repeat the process for all language version used in the Open Loyalty

To edit a translation:

1. In the upper-right corner, tab the **Settings** (⚙️) icon. Then on the menu, choose **Translations**
2. In the **Translations list** grid, find the record to be edited, and click **Edit** (✎) icon in the Action column to open the record in edit mode
3. Make any necessary changes to translated text.
4. When complete, tap **Save**
5. Date of last translation modification will be displaying in the **Translations list** grid in the **Updated at** column.



Translation Editing mode

Emails

Email templates define the layout, content, and formatting of automated messages sent from Open Loyalty. Open Loyalty includes a set of responsive email templates that are triggered by a variety of events that take place during the operation of your Loyalty Program. You will find a variety of prepared email templates related to customer activities, admin actions, and system messages that you can customize.

Key	Subject	Edit
Open Loyalty User: email_registration	Account created	<input checked="" type="checkbox"/>
Open Loyalty User: email_registration_with_temporary_password	Account created	<input checked="" type="checkbox"/>
Open Loyalty User: email_password_reset	Password reset requested	<input checked="" type="checkbox"/>
Open Loyalty User: email_customer_reward_bought	{program_name} - new reward	<input checked="" type="checkbox"/>
Open Loyalty User: email_new_points	{program_name} - new points	<input checked="" type="checkbox"/>
Open Loyalty User: email_new_level	{program_name} - new level	<input checked="" type="checkbox"/>

Email Templates

Email templates

EMAIL	EVENT	DESCRIPTION
REGISTRATION WITH TEMPORARY PASSWORD		
	E-mail send after registering new Customer Account using Administrator Cockpit, POS Cockpit, API.	It contains temporary password to activate an account and link to download Terms & Conditions file (.PDF)
REGISTRATION	E-mail send when Customer register to program using Customer Cockpit.	Email with link to activate account (password is entered by customer during filling out registration form) and link to download Terms & Conditions file (.PDF)
PASSWORD RESET		
	Send when user click on Forgot password and provide proper email address	E-mail with reset password link
CUSTOMER REWARD		
	Send after Customer confirm reward redemption	It contains coupon code and reward campaign name.
NEW POINTS		
	Send after Customer earn points	It contains new points value and current amount of all active points

NEW LEVEL

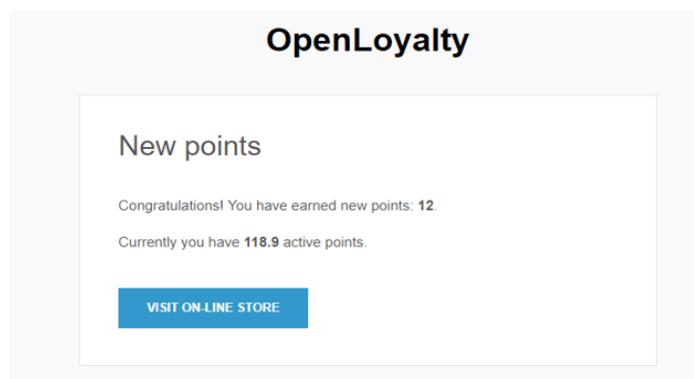
Send after Customer reach next level

It contains information about customer new level and new discount.

Customizing Email templates

Open Loyalty includes a default email template for the body section of each message that is sent by the system. The template for the body content is formatted with HTML and CSS, and can be easily edited, and customized.

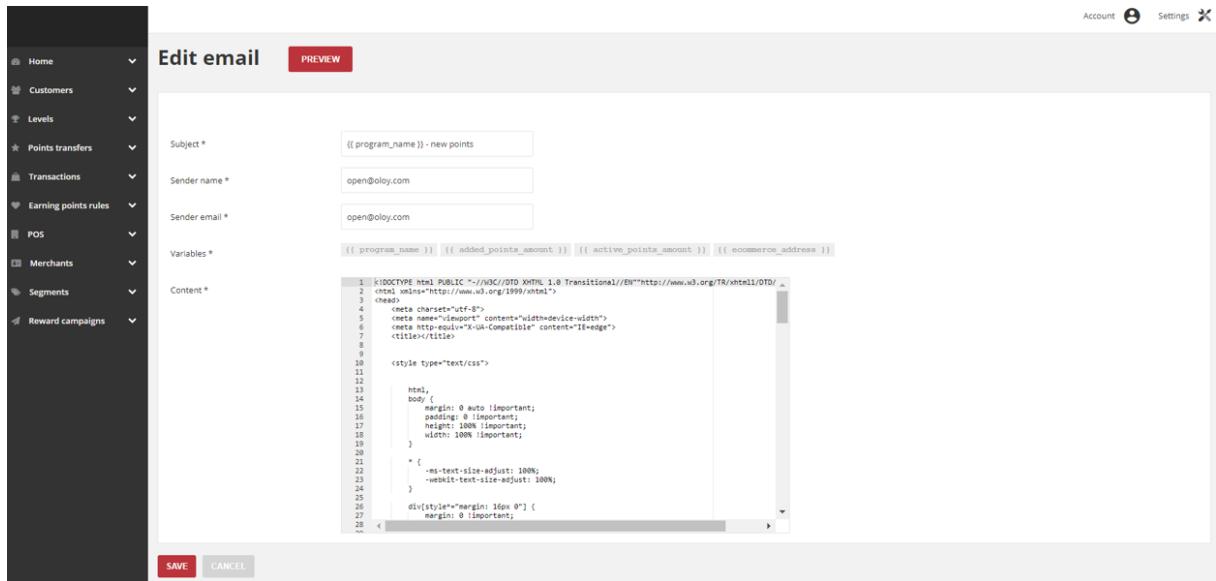
From "open@oloy.com" <open@oloy.com>
Subject **OpenLoyalty - new points**
To "user@oloy.com" <user@oloy.com>



Preview of New Points Email

To edit an email template:

1. In the upper-right corner, tab the **Settings** (⚙️) icon. Then on the menu, choose **Emails**
2. In the **Emails list** grid, find the record to be edited, and click **Edit** (📝) icon in the Action column to open the record in edit mode



Template Information

3. Make any necessary changes to the following:

- a. Enter new **Subject** of email message which will be displayed when recipient get email. For example OpenLoyalty – new points. The Template Subject appears also in the Subject column in **Emails list** grid.
- b. In **Sender name** field enter the name which will be displayed when recipient open an email in external email system, as the reference so that your recipient knows it was you who sent the message
- c. In **Sender email** field provide an email address which will be displayed when recipient open an email in external system,
- d. Every template has predefined variables added to content in **Variables** field. The selection of available variables depends on the template and can not be changed.
- e. HTML code is used to define content of email. In the **Content** box, modify the HTML as needed. Any changes of the content should be made by technical persons, who knows HTML to avoid further technical issues with templates.

When working in the template code, be careful not to overwrite anything that is enclosed in double braces

4. When you are ready to review your work, tap **Preview**. Then, make adjustments to the template as needed.
5. When complete, tap **Save**

System logs

Logs grid allows to monitor every changes on the customer data. The log file is accessible only to Admin users throughout the Admin Cockpit. Logs view allows you to check the date and time that change was made, type and unique ID of change and user name and his unique ID associated with this change.

In addition you can control logs results by filter and search option.

System Logs

System monitors and logged following events/operations:

1. **Create** -

Customer and all elements related to customer: transactions, transfers.

For example: new points transfer to customer account creation

2. **Modify** -

Customer, all elements related to customer (transactions, transfers, redeemed rewards), operations that change customer data indirectly (segments and level assignment)

For example: agreements updated,

3. **Read** -

Customer and all elements related to customer: transactions, transfers, redeemed rewards

For example: view customer

4. **Delete** -

Customer, all elements related to customer (transactions, transfers, redeemed rewards), operations that change customer data indirectly (segments and level assignment)

For example: delete points transfer to customer account

Search Logs by date range

You can search for system logs by a certain time period using **Search from time period** search box. Date ranges can be specified with static start and end dates.

The date format is as follows: "YYYY-MM-DD HH:mm" and allows to display logs that have been placed from and up to the specified date

The screenshot shows the 'Logs' search interface. At the top, there is a search bar labeled 'Search from time period:' with 'From' set to '2018-05-07 16:00' and 'To' set to '2018-05-26 16:00'. Below this is a calendar grid for May 2018, with the 26th highlighted in red. To the right of the calendar is a 'SEARCH' button. Below the search bar, there are three columns: 'Created at', 'Entity type', and 'Event type'. The first row shows '2018-03-21 04:46' for Created at, 'customer' for Entity type, and 'ViewCustomer' for Event type. The second row shows '2018-03-21 04:48' for Created at, 'customer' for Entity type, and 'ViewCustomer' for Event type. At the bottom right of the interface is a 'Search box' containing the text 'Audit log ID'.

Search box

To find a match:

1. In the upper-right corner, tab the **Settings** (⚙) icon. Then on the menu, choose **System logs**
2. Set up the starting date in **From** field by selecting date and time from calendar grid
3. Set up the end date in **To** field by selecting date and time from calendar grid
4. When complete, tap **Search**

Search/Filter Logs

The filters in the header of each column can be used to limit the list to specific values. You can simply type the value you want to find and press Enter.

The screenshot shows the 'Logs' search interface with a sidebar on the left containing navigation links: Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, and Reward campaigns. The main area is titled 'Logs' and contains a search bar for 'Search from time period:' with 'From' and 'To' fields both set to 'YYYY-MM-DD HH:mm'. Below the search bar is a table with columns: 'Created at', 'Entity type', 'Event type', 'Username', 'Audit log ID', and 'Entity ID'. The table shows four log entries for March 1st, 2018, at various times, all performed by 'admin' on a 'customer' entity with event type 'ViewCustomer'. The 'Audit log ID' and 'Entity ID' columns show unique identifiers for each log entry. At the bottom right of the interface is a 'Search/Filter Logs Results' section.

To search the list:

- 1.** In the selected column in the field under column header type the value you want to find
 - To find a close match, enter the few letters/signs of what you want to find
 - To find an exact match, enter the exact word/number you want to find.
- 2.** You can put as many values under different columns headers as needed to describe the conditions that must be met for the search result. Search values from each column create an AND Condition rule. It means that in search results only records matching all entered values are displayed.

CUSTOMERS

In this section of the guide, you will become familiar with the customer account menu, and learn to manage customer accounts according to adding, deleting and modifying data. You will also learn how to create customer account that can be referenced in customer levels and segments.

CUSTOMERS MENU

- [All Customers](#)
- [Referred customers](#)

CREATING CUSTOMER ACCOUNT

- Import Customer list
- XML file structure
- Updating customer account
- Deactivate a customer's account

CUSTOMER PROFILE DETAILS

Customer Account details

- Profile details
- Agreements
- Segments
- Current level
- Assigned POS
- Assigned Merchant

Customer Loyalty Activity

- Loyalty
- Profitability
- Transactions
- Points transfers
- Available rewards
- Redeemed rewards

CUSTOMERS ACCOUNTS

Customer account activation

- Account activation via SMS
- Account activation via E-mail

Customer Sign In

Customer Account

CHAPTER 4:

CUSTOMERS MENU

The Customers menu provides access to all customer information required for its existence in your Loyalty Program. This applies to both, customer personal data (such as name, surname, gender, date of birth and contact details) and data on its activity in the program (such as registered transactions and points transfer).

First name	Last name	Phone	E-mail	Gender	Birth date	Created at	CLV	AVO	Orders	Days from last order	Current level	Assigned manually	Actions
Amelie	Langosh	+9456112581677	nolson@example.com	female	1962-11-23	2018-06-28 18:03	1,175.00 EUR	1,175.00 EUR	1	20	SILVER	No	edit query remove
Felicia	Beier	+5069172882704	runolfsson.destiny@example.com	female	1993-05-14	2018-06-28 13:00	2,060.00 EUR	2,060.00 EUR	1	24	GOLD	No	edit query remove
Titus	Hessel	+2848700148990	konopelski.ladarius@example.net	male	1973-12-06	2018-06-28 06:25	5,185.00 EUR	2,592.50 EUR	2	2	VIP	No	edit query remove
Bertha	Anderson	+1083455578943	muller.ryleigh@example.net	male	1979-10-28	2018-06-28 04:39	3,325.00 EUR	1,108.33 EUR	3	9	GOLD	No	edit query remove
Elmer	Walker	+7028893545405	milford.becker@example.com	male	1976-09-16	2018-06-27 21:07	620.00 EUR	620.00 EUR	1	15	SILVER	No	edit query remove

Customers Menu

To display the Customers menu:

On the Admin sidebar, tap **Customers**, then choose **All customers**.

Menu options

First name	Last name	Phone	Email	Gender	Birth date	Created at	CLV	AVO	Orders	Days from last order	Current level	Assigned manually	Actions
Amelie	Langosh	+9456112581677	nolson@example.com	female	1962-11-23	2018-06-28 18:03	1,175.00 EUR	1,175.00 EUR	1	20	SILVER	No	edit query remove
Felicia	Beier	+5069172882704	runolfsson.destiny@example.com	female	1993-05-14	2018-06-28 13:00	2,060.00 EUR	2,060.00 EUR	1	24	GOLD	No	edit query remove
Titus	Hessel	+2848700148990	konopelski.ladarius@example.net	male	1973-12-06	2018-06-28 06:25	5,185.00 EUR	2,592.50 EUR	2	2	VIP	No	edit query remove
Bertha	Anderson	+1083455578943	muller.ryleigh@example.net	male	1979-10-28	2018-06-28 04:39	3,325.00 EUR	1,108.33 EUR	3	9	GOLD	No	edit query remove
Elmer	Walker	+7028893545405	milford.becker@example.com	male	1976-09-16	2018-06-27 21:07	620.00 EUR	620.00 EUR	1	15	SILVER	No	edit query remove

All customers

Lists all customers who have registered for an account with your loyalty program, or were added by the administrator.

Add customer

Lists all data that need to be filled out to add new customer to your Loyalty Program

Referred customers

Lists all referred customers and recipients of their invitations details

All Customers

The Customers page lists all customers who have registered for an account with your loyalty program, or were added by the administrator (manually or imported from XML file)

Use the standard controls to sort the list, filter and search customer by typing in the field under column header value you want to find, and apply actions to selected customers. Pagination controls appear if there are more customer records than fit on the page, and are used to move from one page to the next.

First name	Last name	Phone	E-mail	Gender	Birth date	Created at	CLV	AVO	Orders	Days from last order	Current level	Assigned manually	Actions
Daija	Emmerich	+48568931256	white.wendy@example.com	female	1962-11-17	2018-07-03 01:45	1,965.00 EUR	1,965.00 EUR	1	6	VIP	Yes	
Janice	Kemmer	+6678773472761	ygerhold@example.com	male	1970-09-29	2018-07-02 19:53	375.00 EUR	375.00 EUR	1	28	BRONZE	No	
Amalia	Trantow	+9145933600837	greenfelder.fredy@example.org	male	1972-03-28	2018-07-02 12:40	686.00 EUR	686.00 EUR	1	14	SILVER	No	
Heloise	Kemmer	+1511770669333	reece.herman@example.com	female	1966-09-25	2018-07-02 11:38	4,525.00 EUR	2,262.50 EUR	2	17	GOLD	No	
Carolanne	Lubowitz	+48569841237	mryan@example.org	male	1982-02-24	2018-07-02 08:37	4,675.00 EUR	2,337.50 EUR	2	21	SILVER	Yes	
Emory	Treutel	+9242687725806	spencer.chaz@example.org	male	1969-03-20	2018-07-02 03:07	1,360.00 EUR	680.00 EUR	2	4	SILVER	No	
Cassie	Rice	+1651391910665	corkery.antonia@example.net	male	1977-03-14	2018-07-02 02:06	2,940.00 EUR	2,940.00 EUR	1	22	GOLD	No	
Domenico	Runolfsdottir	+1650584578641	bkihn@example.net	male	1959-07-19	2018-07-01 18:25	4,580.00 EUR	1,526.67 EUR	3	4	GOLD	No	

All Customers

Field description

FIELD	DESCRIPTION
First name	The first name of the customer
Last name	The last name of the customer
Phone	The customer's phone number. Can be used as a login to Customer Cockpit or search/filter option.
E-mail	The customer's email address. Can be used as a login to Customer Cockpit or search/filter option.
Gender	The customer gender
Birth date	The customer's date of birth
Created at	The date when customer account was created
CLV (Customer Lifetime Value)	The total amount of customer registered transactions

AVO (Average Value of Order)	The average amount of customer registered transactions
Orders	The total number of registered transactions (orders) from customer registering in the Loyalty Program
Days from last order	The number of days since the last registered customer transaction
Current level	Current level that is assigned to customer account. To learn more about levels see Levels
Assigned manually	Information whether current customer level was assigned manually by Admin or not. Options include: Yes/No. To learn more about distinction between manually assigned level and system assignment please see Levels
Actions	The operations that can be applied to selected customer record. Options include: <ul style="list-style-type: none"> • Edit customer account • View Customer profile details • Deactivate customer account • Unlink manually assigned level. Previous system level will be assigned.

To view customer detail information:

1. On the Admin sidebar, tap **Customers**. Then choose **All Customers**
2. In the Customers list, find the record to be previewed and click **View** (🔍) icon in the Action column to open the record in view mode.

The screenshot shows the 'Customer Record Preview' page for a customer named 'David Cust'. The page is divided into several sections:

- Loyalty:** Displays Active points (0), Used points (0), and Expired points (2548.5).
- Profitability:** Displays CLV (10196 USD), AVO (1456.57 USD), and Orders (7).
- Transactions:** A table showing a list of transactions with columns: Document number, Document type, Purchase date, POS, Amount, Points earned, and Actions.
- Profile details:** Shows basic information: First name (David), Last name (Cust), Birth date (2018-07-03), Gender (male), and Created at (2018-03-07 06:29). It also includes a 'Show all profile details' link and an 'Agreements' section with a checked checkbox for 'Legal agreement'.
- Buttons:** Includes a red 'EDIT' button at the top right and a red 'ALL TRANSACTIONS' button at the bottom center.

Customer Record Preview

To learn more about **Customer Profile Detail Page**, see **Profile details**

Referred customers

Referral (refer a friend, member get member) functionality allow to reward Customers for invitation other Customers to Loyalty program. It allows to give prize either referrer (Customer who send invitation) and recipient (Customer who respond with action to invitation).

Administrator can view all invitations sent by customer with current status:

- **Invited** – invitation was sent by referrer to the recipient on his email address
- **Registered** – referred customer (recipient) register new account in Open Loyalty
- **Made purchase** – referred customer (recipient) made first purchase in Open Loyalty

Referrer Id	Referrer Name	Recipient Id	Recipient Name	Recipient Email	Status
00000000-0000-474c-b092-b0dd880c07e1	John Doe	Not set	Not set	kbzik@divante.pl	Invited
00000000-0000-474c-b092-b0dd880c07e1	John Doe	Not set	Not set	tsmolarek@divante.pl	Invited
00000000-0000-474c-b092-b0dd880c07e1	John Doe	Not set	Not set	hubert@openloyalty.io	Invited
00000000-0000-474c-b092-b0dd880c07e1	John Doe	Not set	Not set	valedz@gmail.com	Invited
00000000-0000-474c-b092-b0dd880c07e1	John Doe	Not set	Not set	tomasz6smolarek@wp.pl	Invited

Referred Customers

To see all customers who send and received invitation:

1. On the Admin sidebar, tap **Customers**. Then choose **Referred customers**.

Column descriptions

COLUMN	DESCRIPTION
Referrer Id	The customer ID of a registered customer, who send invitation
Referrer Name	The name and surname of a registered customer
Recipient Id	The customer ID of a referred person. Will be shown when referred customer will register
Recipient Name	The name and surname of a referred person. Will be shown when referred customer will register
Recipient Email	The email address of an invitation recipient
Status	Options include: invited/registered/made purchase

CHAPTER 5:

CREATING CUSTOMER ACCOUNT

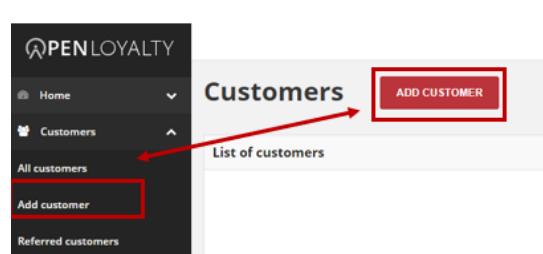
Customer usually create their own accounts from your webshop or using Customer Cockpit. However, you can also create customer account directly from the Admin or POS Cockpit, which is useful when customers order by phone or at merchant location.

The Customer account created from the Admin or POS Cockpit has an active status at once, so there is no need to activate its account by him

New Customer Account Information

To create a New Customer Account :

1. On the Admin sidebar, tap **Customers**. Then, choose **Add Customer**. You can also add customer directly from **All customers** list by clicking **Add Customer** at the top of the page.



Add Customer Options

Basic Information

First name*	<input type="text"/>
Last name*	<input type="text"/>
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female
Birth date	<input type="text"/> YYYY-MM-DD
E-mail*	<input type="text"/>
Phone	<input type="text"/>
Loyalty card number	<input type="text"/>
Labels	<input type="button" value="ADD LABEL"/>
Select level	<input type="button" value="▼"/>
Select POS	<input type="button" value="▼"/>
Select merchant	<input type="button" value="▼"/>
Company	<input type="text"/>
Address	<input type="text"/>

Basic Information

- 2.** In the **Basic Information** section, complete the following required fields:

- First name
- Last name
- E-mail

For one email address only one Customer Account could be created.

You can change the email address associated with an account by editing a customer

- 3.** In the same section, complete the optional fields as needed:

- Gender
- Birth date
- Phone
- Loyalty card number

- Select level
 - Select POS
 - Select merchant
- 4.** If applicable, create **Label(s)** you want refer to customer. Labels are intended to be used to specify identifying attributes of customer. Labels can be used to organize and to select subsets of customers at customer segmentation process. To learn more about Customer segmentation, see **Segments**

The screenshot shows a user interface for adding labels. At the top left is the word 'Labels'. Below it are two input fields: 'Key *' and 'Value *'. Underneath these fields is a red rectangular button labeled 'ADD LABEL' with white text. In the top right corner of the interface area, there is a small trash bin icon.

Customer Labels

- a.** To create Label, tap **Add Label** and do the following:
- Type label **Key**, which is a label name
 - Type label **Value**
- For example: Key – Customer type, Value – wholesale
- b.** Repeat the process for all labels you want to used in your Loyalty Program

Labels can be added to customer during account creation and subsequently added and modified at any time

- 5.** Mark **Company** checkbox, to define customer type if needed.
- 6.** Mark **Address** checkbox, to complete customer address information if needed.

The screenshot shows the 'Add customer' form interface. On the left, a sidebar menu includes 'Home', 'Customers' (selected), 'All customers', 'Add customer', 'Referred customers', and several dropdown menus for 'Levels', 'Points transfers', 'Transactions', 'Earning points rules', 'POS', 'Merchants', 'Segments', and 'Reward campaigns'. The main content area is divided into two sections: 'Company Data' and 'Address'. The 'Company Data' section contains fields for 'Company name*' and 'Tax Identification Number *'. The 'Address' section contains fields for 'Street name*', 'Building name*', 'Flat/Unit name', 'Postal code*', 'City*', 'State/Province', and 'Country*'. At the top of the form, there are two checkboxes: 'Company' (checked) and 'Address' (checked).

Company Data and Address Sections

7. **Company Data** section is available only when **Company** checkbox is selected. All fields available in this section i.e. **Company name** and **Tax Identification Number** are required and need to be filled out.
8. **Address** section is available only when **Address** checkbox is selected. Complete the following required fields:

- Street name
- Building name
- Postal code
- City
- Country

In the same section, complete the optional fields as needed:

- Flat/Unit name
- State/Province

9. Mark the **Agreements** that customer has agreed to. **Legal agreement** is required and need to be filled out to set up an account.

Agreements

Legal agreement*	<input type="checkbox"/> This agreement is required
Marketing agreement	<input type="checkbox"/>
Data processing agreement	<input type="checkbox"/>

Agreements

10. When complete, tap **Save**

When the customer account is saved, its record appears at **All customers** list. The Customer Profile Details tab displays a summary of account activity and data provided during account creation. To learn more about Customer Profile, see **Profile details**

Field description

FIELD	DESCRIPTION
BASIC INFORMATION	
First name*	The customer's first name
Last name*	The customer's last name
Gender	Identifies the customer's gender as Male or Female
Birth date	The customer's date of birth. Information can be used to calculate points for the birth anniversary
Email*	The customer's email address. Is used as a login name while logging to Customer Cockpit.
Phone	The customer's phone number. Formatting is as follows: <ul style="list-style-type: none"> • Country code: +48 • Subscriber number: 123456789 • In total: +48123456789
Loyalty card number	The customer loyalty card number
Labels	Internal tags you can use to refer to your customer. If applicable, can be used for segmentation to identify the customers that this segment applies to
Select level	Starting level assigning to customer
Select POS	POS which will be linked to the customer
Select Merchant	Merchant account, which will be linked to the customer
Company	Customer associated with company. If marked then additional section will be shown.
Address	Customer address needed. If marked then additional section will be shown
COMPANY DATA <i>Visible only when Company checkbox is marked</i>	

Company name*	The company name, if applicable for this customer
Tax Identification Number*	The company Tax or Value Added Tax number, if applicable

ADDRESS

*Visible only when **Address** checkbox is marked*

Street name*	The street address of the customer
Building name*	The name/number of a building or property where the customer resides at this address
Flat/Unit name	The flat/unit name or number of the customer at this address
Postal code*	The postal code of the customer at this address
City*	The city where the customer resides at this address
State/Province	The state or province of the customer at this address
Country*	The country where customer resides at this address

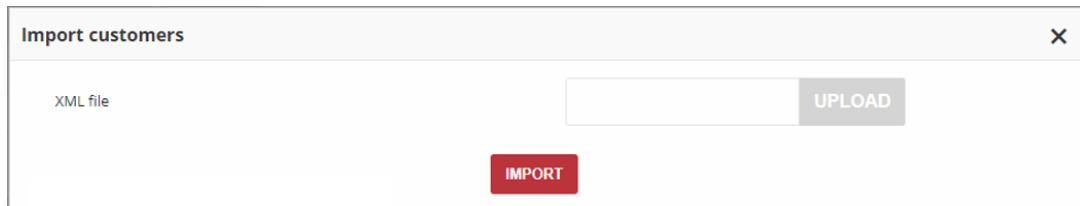
AGREEMENTS

List of consents to which the customer can/has agreed. Options include:

- Legal agreement (required)
- Marketing agreement
- Data processing agreement

Import Customer list

If you have a customer list that you want to add to your Loyalty Program, you can enter it into a customer XML file and then import it in your Open Loyalty Admin.

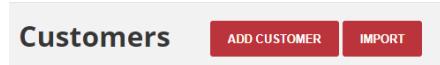


Customers import

Importing a XML file will create a customer in your Loyalty platform for each email address, phone number and loyalty card number in the file. **Any customers with duplicate email addresses, phone numbers or loyalty card number will be skipped** during an import

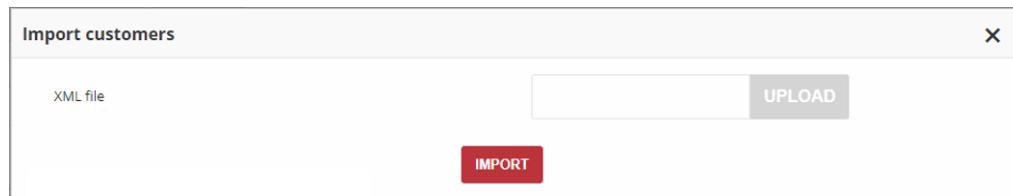
To import a Customer list from a file:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**
2. Click **Import** at the top of the page, next to **Add customer**



Customers Import Button

3. In the **Import Customers** dialog, click **Upload** and then choose your customer XML file.



Import customers

4. When file selected, click **Import**

The customers whose records you've added to the XML file will appear in the All customers list in your Open Loyalty admin

XML file structure

Example of Customer XML file structure below:

```
<?xml version="1.0" encoding="UTF-8"?>
<customers>
  <customer>
    <active>true</active>
    <sendActivationMail>false</sendActivationMail>
    <address>
      <address1>Building name</address1>
      <address2>Flat/Unit name</address2>
      <city>Wroclaw</city>
      <country>PL</country>
      <postal>45-123</postal>
      <street>Main road</street>
    </address>
    <agreement1>true</agreement1>
    <agreement2>true</agreement2>
    <agreement3>true</agreement3>
    <birthDate>1985-02-03</birthDate>
    <company>
      <name>Company</name>
      <nip>123-12-22-123</nip>
    </company>
    <email>jdoe@example.com</email>
    <firstName>John</firstName>
    <lastName>Doe</lastName>
    <gender>male</gender>
    <labels>
      <label>
        <key>group</key>
        <value>wholesaler</value>
      </label>
    </labels>
  </customer>
</customers>
```

```

</label>
</labels>

<loyaltyCardNumber>12982332</loyaltyCardNumber>
<phone>4823123123</phone>
<posId>00000000-0000-474c-1111-b0dd880c07e2</posId>
<sellerId>00000000-0000-474c-b092-b0dd880c07e4</sellerId>
</customer>
</customers>

```

Updating customer account

You can edit information about your customers, including all their data provided during account creation process. You can update customer data directly from their Profile Detail Page or by selecting it's record from All Customers list.

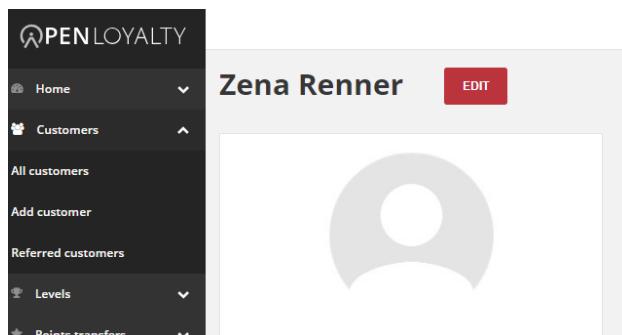
The screenshot shows the 'Edit customer' page in the Open Loyalty software. The left sidebar is a dark-themed navigation menu with various sections like Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, and Reward campaigns. The main content area is titled 'Edit customer' and contains a 'Basic Information' section. This section includes fields for First name (Zena), Last name (Renner), Gender (Male selected), Birth date (2005-05-17), E-mail (jaylin.skiles@example.net), Phone (+3201216796787), Loyalty card number (empty), Labels (ADD LABEL button), Select level (VIP dropdown), Select POS (dropdown), Select merchant (John Doe dropdown), Company (checkbox), and Address (checkbox). At the top right, there are links for Account, Settings, and a close button.

Customer account editing

To edit a Customer Account from Customers list:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. In the Customers list, find the record to be edited and click **Edit** () icon in the Action column to open the record in edit mode.
3. Make any necessary changes to the customer account information.
4. When complete, tap **Save**

To edit a Customer Account from Profile Detail Page:



Edit Option in Profile Details

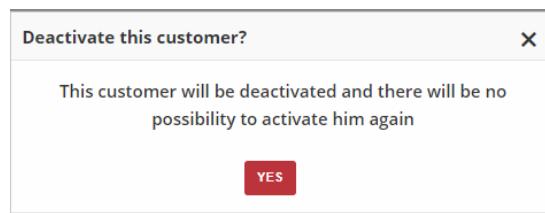
1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. In the Customers list, find the record to be previewed and click **View** () icon in the Action column to open the record in view mode.
3. Click **Edit** at the top of the page. The same editor will be opened like in example above.
4. Make any necessary changes to the customer account information.
5. When complete, tap **Save**

Deactivate a customer's account

Any customer account that is currently inactive appears in the Customers list as grayed-out. An account can be locked and unlocked (set to active) by Admin user.

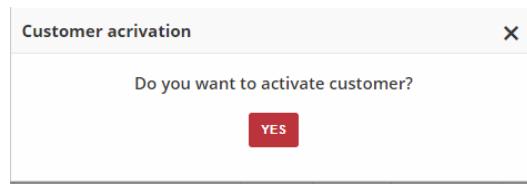
To lock/unlock an admin account:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**. You can also deactivate/activate customer account from **Edit mode**.
2. In the Customers list, find the record to be lock/unlock and click **Deactivate/Activate** () icon in the Action column.
3. System will display a message asked you to confirm the action



System Message

4. The deactivated customer account appears on the Customers list as a greyed-out.
5. To activate an account click the same icon () and confirm the action



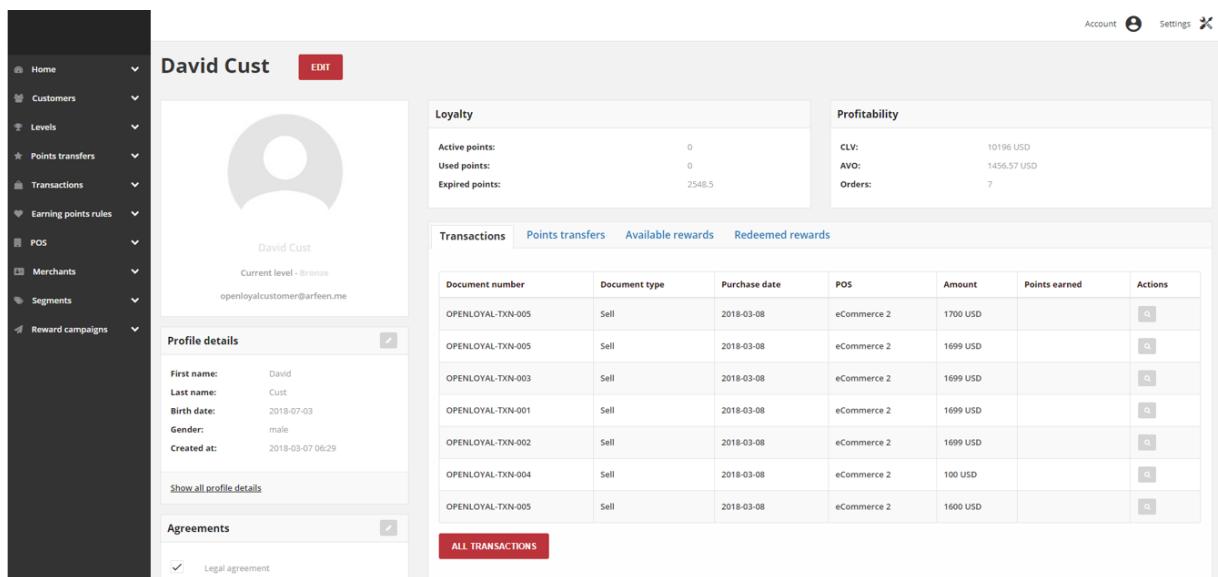
System message

6. The activated customer account appears on the Customers list as a black

CHAPTER 6:

CUSTOMER PROFILE DETAILS

The Customer Profile Detail Page is used to hold all the details of your customers. You can view and manage the customer's loyalty & personal information, history of customer transactions, points transfer and redeemed rewards.



The screenshot shows the 'Customer Profile Details' page for a customer named 'David Cust'. The left sidebar contains navigation links for Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, and Reward campaigns. The main content area displays the customer's profile picture, name, current level (Bronze), and email (openloyalcustomer@arfeen.me). It also shows the Loyalty section with Active points (0), Used points (0), and Expired points (2548.5). The Profitability section shows CLV (10196 USD), AVO (1456.57 USD), and Orders (7). Below these are tabs for Transactions, Points transfers, Available rewards, and Redeemed rewards. The Transactions table lists seven recent purchases (Document number: OPENLOYAL-TXN-005, OPENLOYAL-TXN-005, OPENLOYAL-TXN-003, OPENLOYAL-TXN-001, OPENLOYAL-TXN-002, OPENLOYAL-TXN-004, OPENLOYAL-TXN-005) with details like Purchase date (2018-03-08), POS (eCommerce 2), Amount (1700 USD, 1699 USD, etc.), and Points earned (varies). At the bottom, there is a checkbox for 'Legal agreement' and a red 'ALL TRANSACTIONS' button.

Customer Profile

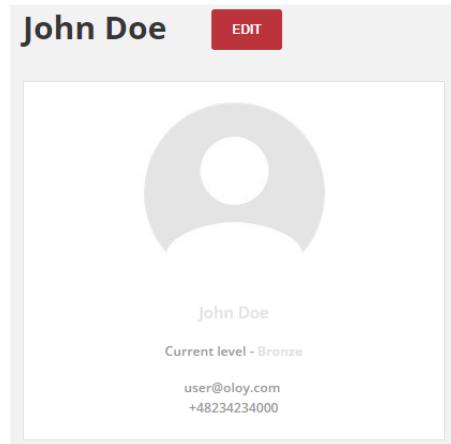
Customer Account details

Profile details

The Customer Profile details section provides the short customer account summary and information of customer provided during registration.

Block in the upper left corner, shows some factors describing Customer and its account summary, such as:

- First name,
- Last name,
- Current loyalty level,
- Email address
- Phone number



Customer Account Summary

Block below, provides a snapshot of customer personal information entered during registration process both required and optional. Address information will appear in small window after clicking **Show all profile details** link.

If the optional information (such as birth date, gender, address etc.) will not be completed during registration, the corresponding fields in this sections remain blank.

To update customer data go to edit mode by clicking **Edit** (edit icon) in the block header or Click **Edit** above account summary block, at the top of the page.

The image shows a modal window titled 'Profile details' containing a table of customer information. The table includes fields such as First name, Last name, Birth date, Gender, Created at, City, State/Province, Street name, Building name, Flat/Unit name, Postal code, and Country. Most fields have sample data like 'John', 'Doe', '1990-09-11', 'male', and '2016-08-08 10:53'. Some fields like City, State/Province, Street name, Building name, Flat/Unit name, Postal code, and Country have three dots indicating they are collapsed.

Profile details	
First name:	John
Last name:	Doe
Birth date:	1990-09-11
Gender:	male
Created at:	2016-08-08 10:53
City:	...
State/Province:	...
Street name:	...
Building name:	...
Flat/Unit name:	...
Postal code:	...
Country:	...

Customer Profile Details

The following details are displayed in this section:

1. Profile details (displaying in block)

- First name
- Last name
- Birth date
- Gender
- Created at

2. Profile details (after link clicking)

- Basic information displaying in block, and in addition address information:
 - City
 - State/Province
 - Street name
 - Building name
 - Flat/Unit name
 - Postal code
 - Country

Agreements

Agreements section is a list of consents and include information about their acceptance by customer. If the customer has accepted the agreement, the checkbox in the name record is marked.

Agreements	
<input checked="" type="checkbox"/>	Legal agreement
<input type="checkbox"/>	Marketing agreement
<input type="checkbox"/>	Data processing agreement

Agreements

To mark the agreement as accepted by the customer go to edit mode by clicking **Edit** () icon in the block header or Click **Edit** above account summary block, at the top of the page.

Segments

Segments box consists list of segments to which the customer is currently assigned. To learn more about segments, see [Segments](#)

The image shows a screenshot of a user interface titled "Segments". Inside the box, there are three items listed in separate rounded rectangular boxes: "Birthday anniversary", "Customers loyal to 7 For All Mankind", and "One or more orders".

Segments

Current level

Current level section provides information about current (assigned to customer) level and rewards if available.

The image shows a screenshot of a user interface titled "Current level". It displays the following information in a table-like structure:

Name:	Gold
Condition value:	1500
Reward code:	34567
Reward value:	15%
Special rewards:	SHOW
Assigned manually:	UNLINK

Level Section

Special rewards specify temporary additional discounts that customer assigned to this level can get.

Special rewards							X
Name	Reward code	Reward value	Active	Start at	End at	Created at	
Mother's Day 2016	89011	0.2	true	2016-05-25 00:00	2016-05-26 00:00	2018-05-10 10:54	
Father's Day 2016	78901	0.2	true	2016-03-18 00:00	2016-03-19 00:00	2018-05-10 10:54	

Special Rewards Preview

To **change manually the level** to which the customer is assigned go to edit mode by clicking **Edit** () icon in the block header or click **Edit** above account summary block, at the top of the page. Then, additional field **Assigned manually** appears.

To remove manual assignment by Admin, and let customer earn points based on Earning points rules click **Unlink**

You can also simply Unlink manually assignment also from All customers list by clicking **Unlink** () icon in the **Action** column.

List of customers																
First name	Last name	Phone	E-mail	Gender	Birth date	Created at	CLV	AVO	Orders	Days from last order	Current level	Assigned manually	Actions			
Carl	Morningstar	+56896782364	carl_m@open.com	male		2018-07-02 11:57	0.00 EUR	0.00 EUR	0	Not set	LEVEL2	Yes				

Unlink manual assignment

To learn more about levels and special rewards, see [Levels](#)

Field description

FIELD	DESCRIPTION
Name	Name of the customer level
Condition value	The points limit value after which customer was assigned to the level
Reward code	Discount code to be used on
Reward value	Percentage discount value
Special rewards	Special discounts available when additional conditions are met
Assigned manually	Field will be displayed only when customer level will be assigned manually by Admin – during adding or editing account. To remove manual assignment click Unlink

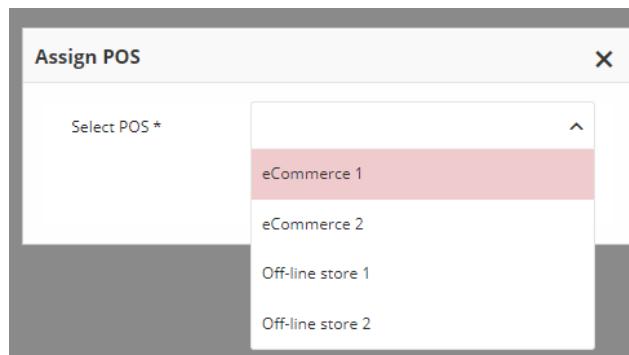
Assigned POS

Assigned POS section include information about customer account assignment to the offline or online store. Customer can be assigned to only one POS.

Assigned POS	
Name:	eCommerce 1
Description:	Sample POS

Assigned POS

To change the POS to which the customer is assigned click **Edit** () icon in the block header and select new POS from a list or Click **Edit** above account summary block, at the top of the page to go to edit mode.



Change of POS assignment from Profile Detail Page

To learn more about offline stores, see **POS**

Assigned Merchant

Assigned Merchant section provide information to which merchant customer is assigned. Not only merchant from POS assigned to customer account can be selected.

Assigned Merchant	
First name:	John
Last name:	Doe
E-mail:	merchant@openloyalty.io

Assigned Merchant

To change the Merchant to which the customer is assigned click **Edit** above account summary block, at the top of the page to go to edit mode.

Customer Loyalty Activity

In the middle part you will find customer data related to his activity in Loyalty Program such as loyalty points balance, transactions, points transfer and rewards (available and redeemed) summary.

Loyalty		Profitability				
Active points:	1565	CLV:	509.86 EUR			
Used points:	155	AVO:	254.93 EUR			
Expired points:	0	Orders:	2			
Transactions Points transfers Available rewards Redeemed rewards						
Document number	Document type	Purchase date	POS	Amount	Points earned	Actions
145000322	Sell	2018-05-10	eCommerce 1	213.53 EUR	213.53	a
145000321	Sell	2018-05-10	eCommerce 1	296.33 EUR		a
ALL TRANSACTIONS						

Customer Loyalty Activity

Loyalty

In **Loyalty** section you can view Loyalty Points balance in the customer's account.

Loyalty	
Active points:	1565
Used points:	155
Expired points:	0

Loyalty Points Balance

- a. **Active Points** - Points assigned to the customer account thought various activity within the loyalty program based on Earning Points Rules.
- b. **Used Points** - Points redeemed by the Customer thought various Reward Campaigns within the loyalty program
- c. **Expired Points** - Points expired due to non-redemption of assigned active points. Points will expire after number of days from date of adding Point transfer. Points lifetime is set in [Open Loyalty Configuration](#)

Profitability

Profitability include information about basic factors regarding customer transactions within the loyalty program.

Profitability	
CLV:	509.86 EUR
AVO:	254.93 EUR
Orders:	2

Customer Profitability

- a. **CLV (Customer Lifetime Value)** - the total amount of customer registered transactions
- b. **AVO (Average Value of Order)** - the average amount of customer registered transactions
- c. **Orders** - the total number of customer registered transactions (orders)within the Loyalty Program

Transactions

Transactions is a tab which contain latest transaction data such as type, place and date of transaction, value of earned points etc. linked with Customer:

Transactions	Points transfers	Available rewards	Redeemed rewards			
Document number	Document type	Purchase date	POS	Amount	Points earned	Actions
145000322	Sell	2018-05-10	eCommerce 1	213.53 EUR	213.53	
145000321	Sell	2018-05-10	eCommerce 1	296.33 EUR		
ALL TRANSACTIONS						

Transactions view

Click **View** (

Transaction details	
Customer name:	John Doe
Phone:	+48567891456
E-mail:	user@oloy.pl
Loyalty card number:	
City:	Wroclaw
State:	dolnoslaskie
Street:	Dmowskiego
Building name:	
Postal code:	50-203
Country:	PL
Purchase date:	2018-05-10 10:05
Transaction id:	145000322
Points earned:	213.53
POS name:	eCommerce 1
Document type:	sell

Item details

Name	Quantity	SKU	Category	Gross value	Labels	Brand
Park Avenue Pleat Front Trousers	1	wpd01012	Women	213.53 EUR		No data
Free Shipping - Free	1	freeshipping_freeshipping	shipping	0 EUR		
SUM				213.53EUR		

Transaction Record Preview

To see the list of all your customer transaction (not only the latest) click [All Transactions](#) below the tab.

To learn more about Transactions, see [Transaction](#)

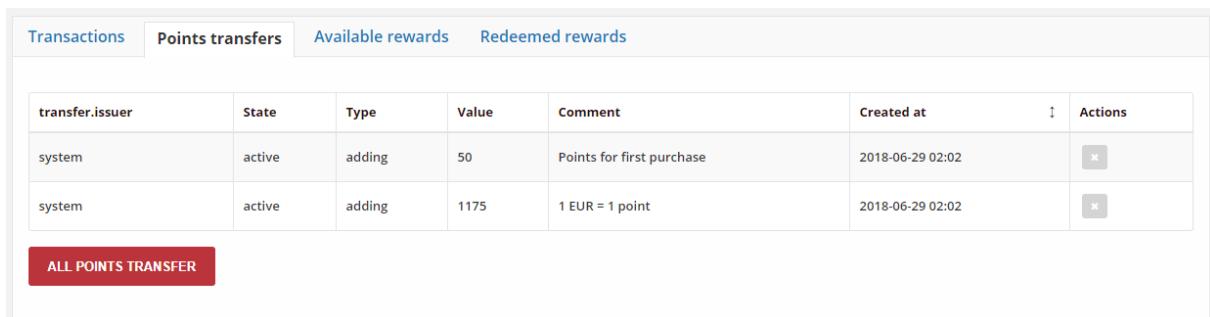
Field description

FIELD	DESCRIPTION
Document number	Unique transaction ID
Document type	Transaction type: <ul style="list-style-type: none"> • Sell – customer buy products • Return – customer return bought products

Purchase date	Date of transaction
POS	POS where transaction was made
Amount	Transaction amount
Points earned	How many points Customer earned/lose for this transaction (order). Transaction with the type "Sell" adds points, and "Return" subtracts
Actions	Open transaction record in view mode to see customers and purchased items details

Points transfers

Points transfers tab provide a view of latest points which customer gain or spend. Moreover, list contains information whether points are the result of Earning Points Rules (system) or they have been manually set by the Admin user (admin).



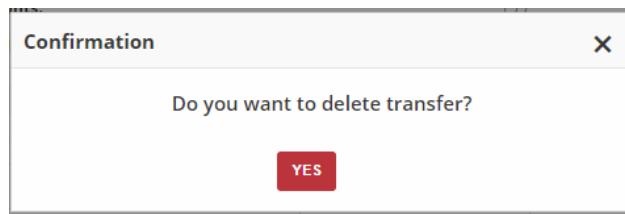
The screenshot shows a table with the following data:

transfer.issuer	State	Type	Value	Comment	Created at	Actions
system	active	adding	50	Points for first purchase	2018-06-29 02:02	
system	active	adding	1175	1 EUR = 1 point	2018-06-29 02:02	

ALL POINTS TRANSFER

Points Transfers Lists

To cancel points transfer click **Remove** () icon in the Action column. System will display a message asked you to confirm the action.



Removing Transfer Action

After canceling, no action to canceled transfer record will be longer available and the **Remove** icon background change color to blue. The same situation deal with Points transfers with "spending" type.

To see the list of all your customer points transfers (not only the latest) click [All Points Transfer](#) below the tab.

To learn more about Points transfers, see [Points transfer](#)

Field description

FIELD	DESCRIPTION
Issuer	Define who create Transfer operation. Options include: system/admin
State	<p>Transferred points state:</p> <ul style="list-style-type: none"> Active - points are available to spend Expired - points expired and can not be used to redeem reward Canceled – points are subtracted from the pool of Active Points as a result of canceling the points transfer
Type	Transfer operation type: Adding/Spending
Value	Amount of points earned/spent within the transfer
Comment	Show details about transfer, e.g. for what customer gets points, for what customer spend points
Created at	Date when points transfer was made
Actions	The remove operations that can be applied to selected transfer record

Available rewards

Available rewards tab contain view of Reward Campaigns available for particular customer, including cost in points to redeem reward and dates when reward is available.

Transactions	Points transfers	Available rewards	Redeemed rewards
ALL REWARD CAMPAIGNS			
Name	Active	Cost in points	Limit
Free delivery	true	20	10
Invitation for the event	true	100	5
Second product for 1 EUR	true	50	10
			Limit per customer
			Is all time active
			Is all time active
			Is all time active
			Is all time active
			Actions

Available Rewards

Click **View** () icon in the Action column to open the Reward Campaign detail information

Campaign details	
Campaign details	
Name:	Free delivery
Campaign type:	free_delivery_code
Short description:	Sample free delivery reward
More information link:	---
Condition description:	Terms and conditions of reward
Cost in points:	20
Active:	Active
Levels:	<input type="checkbox"/> Gold <input type="checkbox"/> VIP <input type="checkbox"/> Bronze <input type="checkbox"/> Silver
Limit:	10
Limit per customer:	10
Coupons:	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10
How to use coupons?:	Instructions how to use coupon
All time visible:	true
All time active:	true

Reward Campaign Details

To see the list of all rewards available for customer within Loyalty Program click **All Reward Campaigns** below the tab.

To learn more about rewards, see **Reward campaigns**

Field description

FIELD	DESCRIPTION
Name	Reward name, that is display to customer
Active	Determines whether the reward is available to customers. Option include: true/false
Cost in points	Define how much points customer must spend to redeem reward
Limit	Information about the redeem rewards limit globally. Is associated with Limit per customer value. <u>For example</u> , value 10 means that reward can be redeem only 10 times (by the same or different customers, what depends on Limit per customer value)
Limit per customer	Information about the redeem rewards limit by one customer. <u>For example</u> , value 1 means that reward can be redeem only once by one customer, value 2 twice etc.
Active from	Start date from which customer can redeem reward
Active to	End date until which customer can redeem reward
Actions	Open reward record in view mode to see reward campaign details

Redeemed rewards

Redeemed rewards tab provide information about rewards (Reward Campaigns) that customer has redeemed, divided into used and delivered.

Redeemed rewards				
Name	Cost in points	Purchased at	Coupon	Used by customers
Free delivery	20	2018-05-18 12:38	4	<input type="checkbox"/>
Free delivery	20	2018-05-16 10:21	3	<input type="checkbox"/>
Free delivery	20	2018-05-14 14:47	2	<input type="checkbox"/>
50 EUR coupon to use in off-line store	50	2018-05-14 12:52	1	<input type="checkbox"/>
Free delivery	20	2018-05-14 12:49	1	<input type="checkbox"/>
Discount code reward	20	2018-05-14 12:49	1	<input type="checkbox"/>
Gift for new members	5	2018-05-11 12:31	1	<input type="checkbox"/>

[All Rewards](#)

Redeemed Rewards

All rewards that customer redeemed appears in this tab as a "*delivered*". Only when customer uses the reward/discount code during the purchase, reward is treated as "*used*".

When customer uses the reward checkbox in the **Used by customers** column is marked.

To indicate that customer has used the reward, Admin user can also manually marks the checkbox in **Used by customers** column.

To see the list of all redeemed rewards by customer within Loyalty Program click [All Rewards](#) below the tab.

To learn more about rewards, see [Redeemed rewards](#)

Field description

FIELD	DESCRIPTION
Name	Reward name, that is display to customer
Cost in points	Define how much points customer spent to redeem reward
Purchased at	The date when reward was redeemed
Coupon	Discount code that was used

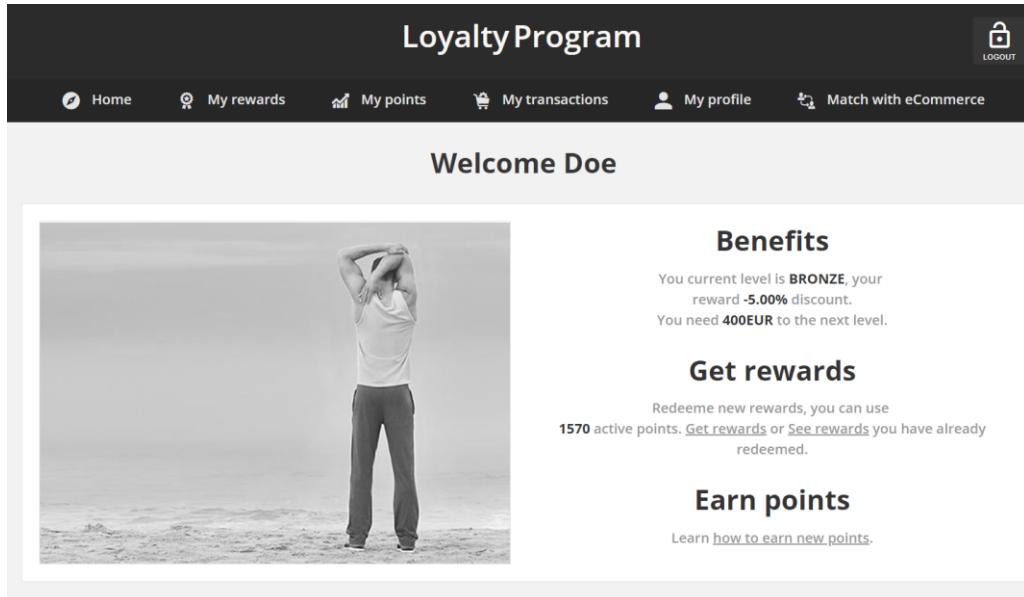
Used by customers	Define whether customer already used the reward or it's only delivered and can be used by him
------------------------------	---

CHAPTER 7:

CUSTOMERS ACCOUNTS

The main page of your website can display message for customers to log in or register for an account with your Loyalty Program. Customers who open an account with your Loyalty Program enjoy a range of benefits.

Customers can access their account dashboard by clicking the link on your website. They can use their account to view and modify their personal information provided during registration process, check and redeem rewards , learn how to earn points, view their transaction history (offline and online) and history of points earned and spent.



Customer Account Home Page

Customer account activation

When customer complete registration form directly from the Client cockpit, depending on the settings, to activate the account he will receive:

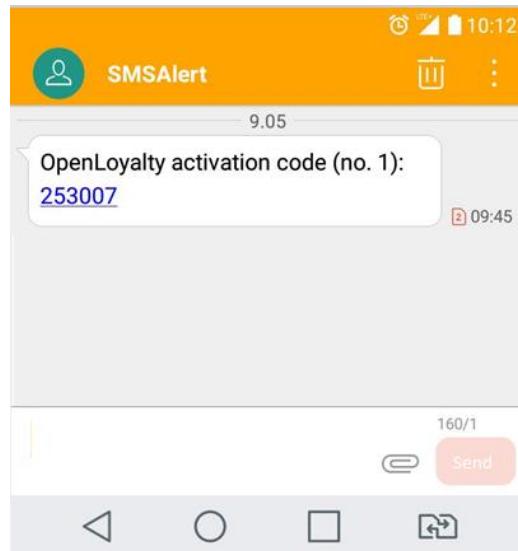
- a. **activation code** – when account activation method is selected to SMS. Activation code will be sent to his phone number provided in the form.
- b. **activation link** – when account activation method is selected to E-mail. Link will be sent to his e-mail address provided in the form.

Remember, that in Open Loyalty settings you can choose only one Account activation method that will be used for all customer.

Note, if you register customer from Admin or POS Cockpit activation code or link is not sent. Customer account is active instantly.

Account activation via SMS

On the phone number provided by customer in the registration form activation code will be sent.

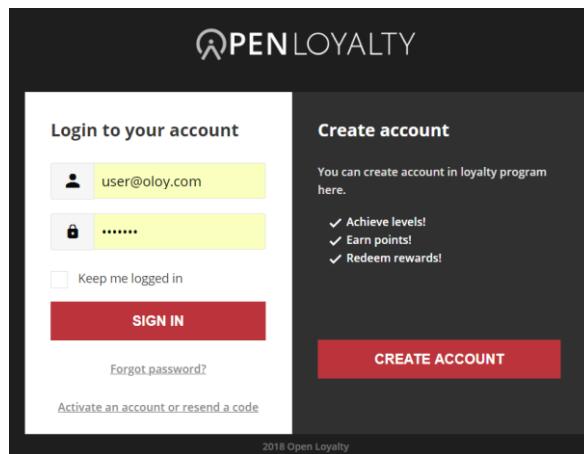


Account activation code SMS message

To activate customer account using SMS code:

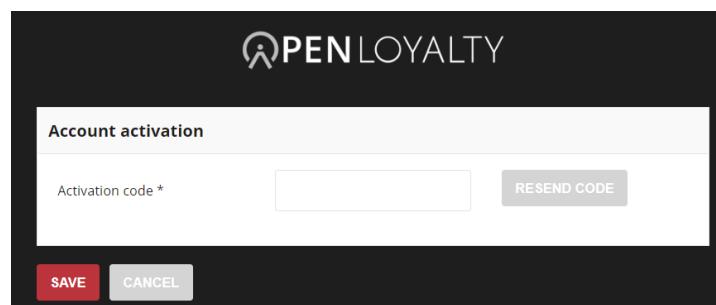
When customer receive that message, he needs to return on Login page and do as follow:

1. On the login page, tap **Activate an account or resend a code**



Login page

2. When prompted, in the Account activation window, enter the **Activation code** that received. Then tap **Save**

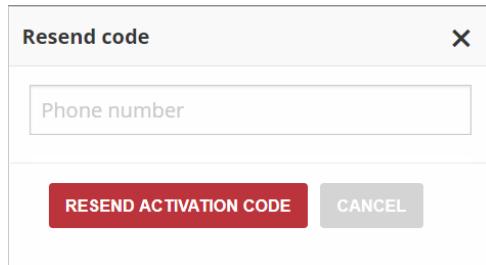


Customer account activation

If for some reason customer will lost this code he can simply resend an activation code.

To resend an activation code:

1. On the login page, tap **Activate an account or resend a code**, like in a previous step
2. When prompted, in the Account activation window, tap **Resend code**
3. Enter the **Phone number** on which another resend code will be sent. Phone number can be different than this one provided in registration form.



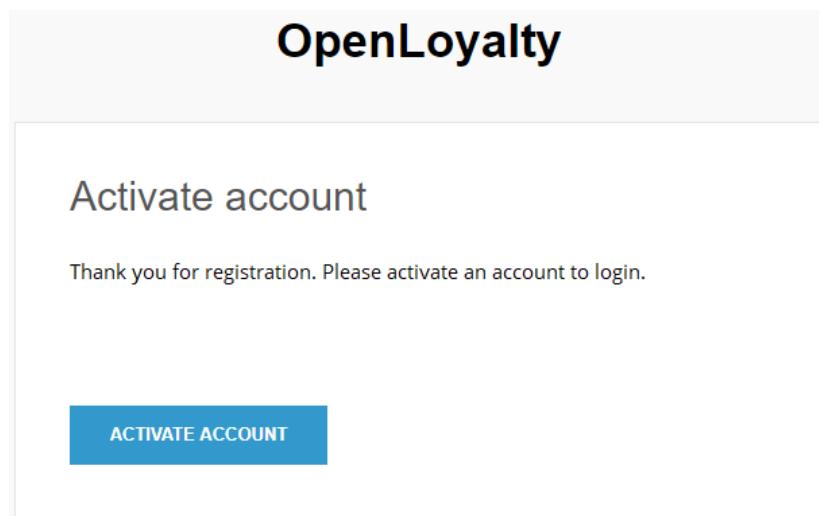
A screenshot of a mobile application dialog box titled "Resend code". It contains a text input field labeled "Phone number" and two buttons at the bottom: a red "RESEND ACTIVATION CODE" button and a grey "CANCEL" button.

Resend code

4. When complete, tap **Resend activation code**

Account activation via E-mail

On the email address provided by customer in the registration form activation link will be sent.



Account activation link email message

To activate customer account using link:

1. Click **Activate account** in the email message
2. Customer account will be activate instantly. Customer will be redirect automatically to login page to enter login credentials.

If for some reason customer will lost this email/link his account can be activated manually by Admin. To learn more about manually customer account activation please see

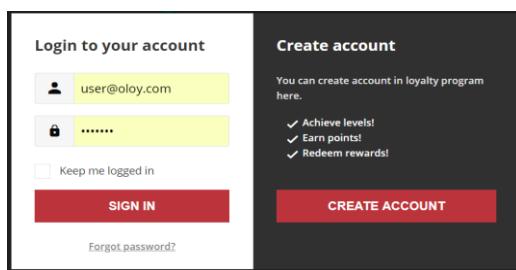
Deactivate a customer's account

Customer Sign In

Customer have easy access to their account from main page of your website. Depending on the configuration, customers can be redirected to customer cockpit as subdomain (like club.yourbrand.com) or as loyalty module within your website.



Link to Loyalty Module within Webshop



Login to your account

user@oloy.com

.....

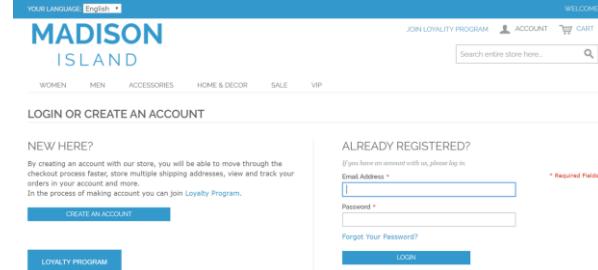
Keep me logged in

SIGN IN

Forgot password?

CREATE ACCOUNT

Sign In to Customer Account within Subdomain



YOUR LANGUAGE English ▾ WELCOME

JOIN LOYALTY PROGRAM ACCOUNT CART

Search entire store here...

MADISON ISLAND

WOMEN MEN ACCESSORIES HOME & DECOR SALE VIP

LOGIN OR CREATE AN ACCOUNT

NEW HERE?

You can create account in loyalty program here.

✓ Achieve levels!
✓ Earn points!
✓ Redeem rewards!

CREATE AN ACCOUNT

LOYALTY PROGRAM

ALREADY REGISTERED?

If you have an account with us, please log in:

Email Address *

Password *

Forgot Your Password?

LOGIN

Sign In to Customer Account within Webshop

When customers forget their passwords, a reset link is sent to the email address that is associated with the account.

To sign in to your customer account:

1. Click a link on the website to open Login page
2. When prompted, enter the **Email Address/Phone number** that is associated with customer account, and **Password**. Then, tap **Sign In**

Depending on the configuration, customer can use to log in: E-mail address or Phone number and Password

To reset your customer account password:

1. On the Login page, tap **Forgot password?**
2. When prompted, enter the **Email Address** that is associated with your account, and tap **Recover Password**

If the email address you entered matches the one that is associated with the account, you will receive a "Password reset requested" email with a link to reset your password.

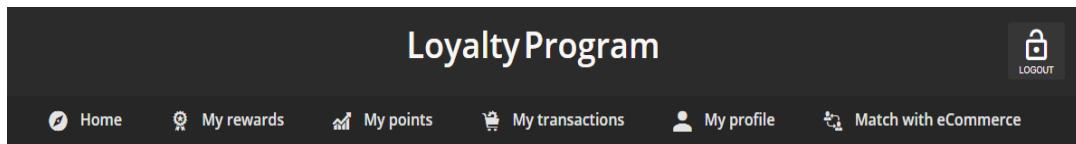
3. Click the **Reset Password link** in the email and enter your **New Password**. Enter it again to confirm.

Your password must be eight or more characters long, and contains at least one upper case letters, one numeric character and one special character

When you receive confirmation that the password is updated, you can use the new password to log in to your account.

To sign out of the customer account:

In the upper-right corner, tap the **Logout** () icon.



Logout

When customer logout, the Sign-In page returns.

Customer Account

Customers through theirs account can view all their activity within Loyalty Program, and manage their own personal information.

The screenshot shows the 'Loyalty Program' home page. At the top, there's a navigation bar with links for Home, My rewards, My points, My transactions, My profile, and Match with eCommerce. Below the navigation is a welcome message 'Welcome Doe' with a profile picture of a person standing on a beach. To the right, there are three main sections: 'Benefits' (current level is BRONZE, next level requires 400EUR), 'Get rewards' (1570 active points, with links to Get rewards or See rewards), and 'Earn points' (Learn how to earn new points). A lock icon in the top right corner indicates a secure session.

Home

The customer's Home page provides them the ability to view current level and assigned to this level reward, active points balance, points missing to next level and links to other areas of loyalty activities: redeem rewards, get more points, edit profile, check transaction, invite friend etc.

The screenshot shows the 'My rewards' page. The navigation bar is identical to the home page. The main content area displays three reward options: 'Free delivery' (20 points, REDEEM REWARD), 'Invitation for the event' (100 points, REDEEM REWARD), and 'Second product for 1 EUR' (50 points, REDEEM REWARD). Each reward has a link to 'See rewards you have already/redeemed'.

My rewards

Lists all available for customer account rewards with a link to see rewards he has already redeemed.

The screenshot shows the 'My points' page. The navigation bar includes a 'Logout' link. The main section is titled 'Earn points' and contains a table with the following data:

Active points	1650
Used points	175
Expired points	0
Transactions value	0EUR
Current discount	5.00%
Next level discount	10.00%
Transactions value (without delivery cost) for the next level	400EUR

Below this is a 'Points transfers list' table showing three entries:

State	Type	Value	Created at	Will expire at	Comment
active	spending	20	2018-05-22 12:23	2018-06-21 12:23	Free delivery, coupon: 5
active	adding	100	2018-05-22 12:13	2018-06-21 12:13	For driving license
active	adding	5	2018-05-22 10:42	2018-06-21 10:42	

My points

Displays a loyalty points balance and levels details. Menu gives him also ability to track all points transfers with detail information regarding the date, point's state and type and reward (in case of transfers with "spending" type)

The screenshot shows the 'My transactions' page. The navigation bar includes a 'Logout' link. The main section is titled 'Transactions' and displays a table with two entries:

Document number	Document type	Amount	Purchase date	POS	Points earned	Actions
1450000323	Sell	206.33 EUR	2018-05-22 16:51	eCommerce 2	20	[View]
162660003602	Sell	3460 EUR	2018-05-05 00:00	On-line store 1	232.3	[View]

At the bottom, it says 'Showing 1 up to 2 from 2 entries.'

My transactions

Displays a list of all customer transaction, with a link to each to see more information – purchased items and transaction details.

The screenshot shows a user profile page titled 'My profile'. At the top, there's a navigation bar with links for Home, My rewards, My points, My transactions, My profile (which is the active tab), and Match with eCommerce. Below the navigation is a large placeholder for a user profile picture, labeled 'John Doe' and showing the email 'user@loyalty.com' and phone '+4223423400'. The main content area is divided into two sections: 'Details' and 'Agreements'. The 'Details' section contains the following information:

First name:	John
Last name:	Doe
Birth date:	1990-09-11
Gender:	male
E-mail:	user@loyalty.com
Password:	*****[REDACTED]
Created at:	2016-08-08 10:13
Country:	[REDACTED]
State:	[REDACTED]

The 'Agreements' section contains three checkboxes:

- legal agreement
- Marketing agreement
- Data processing agreement

At the bottom of the page, there are links for 'Do you have questions? Contact us!' and 'Terms & conditions'.

My profile

Customers can update their account information and change their password as needed. The store Admin can also update **customer accounts**.

LEVELS

In this section of the guide, you will learn how to create and use customer levels to create opportunities for customer engagement and how to set up targeted discounts and rewards based on a variety of conditions. The more points customers receive, the higher level they'll reach. And, the higher level of loyalty, the more rewards customers will get.

You can use levels to offer customer incentives, such as:

- assigned a fixed reward to the particular level. The higher level – the better reward.
- offer limited in time special rewards for customer assigned to particular level

LEVELS MENU

All levels

Customers assigned to level list

Download the Customers list

CREATING CUSTOMER LEVEL

Updating levels data

Activate/deactivate a level

Special rewards

CHAPTER 8:

LEVELS MENU

Levels are used to categorize customers based on the value of their transactions (orders) - The higher value/amount of transaction, the more points they will get and the higher level they'll reach.

Customer is assigned to only one level at a time. Customers are placed into a levels based either on their total amount of transaction or points they have earned. If customer has spent enough money or earned enough points to move up a level, his level will automatically move up and he will be informed about it via email.

The only scenario when customer can return to previous level is when order, which caused this promotion, will be returned.

Customer level can be also changed to higher or lower manually by the Admin user. If you move a customer to a level manually, they are excluded from any automatic levels upgrades or downgrades.

Each level can provide fixed discounts and also have exclusive rewards that can only be claimed when a customer is on that level.

Name	Description	Condition value	Reward name	Reward code	Reward value	Min order value	Customers	Active	Special rewards	Actions
VIP	Customers who spend more than 5000 EUR	5000	20% off for every purchase and additional reward	45678	30.00%	Not set	42	SHOW	ACTIVE	Not set
Silver	Customers who spend more than 400 EUR	400	10% off for every purchase	23456	10.00%	Not set	55	SHOW	ACTIVE	Not set
Bronze	Starting level	0	5% off for every purchase	12345	5.00%	100	20	SHOW	ACTIVE	SHOW
Gold	Customers who spend more than 1500 EUR	1500	15% off for every purchase	34567	15.00%	Not set	192	SHOW	ACTIVE	SHOW

Customers Levels

To display the Levels menu:

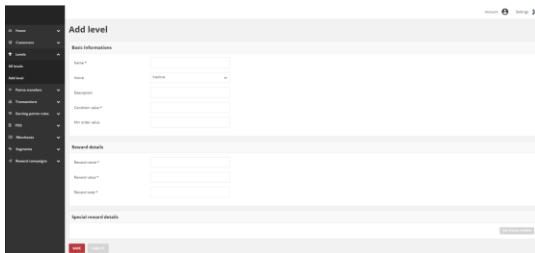
On the Admin sidebar, tap **Levels**, then choose **All levels**.

Menu options

Name	Description	Condition value	Reward name	Reward code	Reward value	Min order value	Customers	Active	Special rewards	Actions
VIP	Customers who spend more than 5000 EUR	5000	20% off for every purchase and additional reward	45678	30.00%	Not set	42	SHOW	ACTIVE	Not set
Silver	Customers who spend more than 400 EUR	400	10% off for every purchase	23456	10.00%	Not set	55	SHOW	ACTIVE	Not set
Bronze	Starting level	0	5% off for every purchase	12345	5.00%	100	20	SHOW	ACTIVE	SHOW
Gold	Customers who spend more than 1500 EUR	1500	15% off for every purchase	34567	15.00%	Not set	192	SHOW	ACTIVE	SHOW

All levels

Lists all customers level within your loyalty program with additional information regarding conditions values, assigned rewards and possible, limited in time, special rewards



Add level

Lists all data that need to be filled out to add new customer level

All levels

The Levels page lists all customers levels available to reach within Loyalty Program. The same list is also visible from the Dashboard.

You can easily view and modify all levels credentials such as condition value, assigned rewards and special rewards. Tab allows also to preview number of customers assigned to particular levels and see theirs detail or download in .CSV file.

The screenshot shows a user interface for managing customer levels. On the left, there's a sidebar with navigation links like Home, Customers, Levels, Add level, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, and Reward campaigns. The main area is titled 'Levels' with a red 'ADD LEVEL' button. Below it is a table titled 'Levels list' containing the following data:

Name	Description	Condition value	Reward name	Reward code	Reward value	Min order value	Customers	Active	Special rewards	Actions
VIP	Customers who spend more than 5000 EUR	5000	20% off for every purchase and additional reward	45678	30.00%	Not set	42	Show (ACTIVE)	Not set	edit remove
Silver	Customers who spend more than 400 EUR	400	10% off for every purchase	23456	10.00%	Not set	55	Show (ACTIVE)	Not set	edit remove
Bronze	Starting level	0	5% off for every purchase	12345	5.00%	100	20	Show (ACTIVE)	Show	edit remove
Gold	Customers who spend more than 1500 EUR	1500	15% off for every purchase	34567	15.00%	Not set	192	Show (ACTIVE)	Show	edit remove

At the bottom of the table, it says 'Showing 1 up to 4 from 4 entries.'

Customers Levels

Use the standard controls to sort the list and apply actions (modify and download targeted customer) to selected levels.

Field description

FIELD	DESCRIPTION
Name	Name of the Customer level, visible when information about level will be displayed
Description	Level brief description
Condition value	Minimum sum of earned points or sum of all transactions value needed to be assigned to this level
Reward name	Description of level reward (e.g. 5% discount).
Reward code	Discount code to be used on
Reward value	Discount value for this level (e.g. 5)
Min order value	Only when earned points for one transaction or one transaction value exceed provided value then it will be added to sum. If level has not defined Min order value then "Not set" will be shown.
Customers	Show customers account number assigned to this level. After Show click, list of these customer details will be shown.
Active	Action to change is Level active. Option include: Active/Inactive
Special rewards	Show Special Reward data related to Level, available when additional conditions will be met. If Level has not defined Special Reward then

	"Not set" will be shown. To learn more about special rewards, see special reward section.
Actions	The operations that can be applied to selected customer record. Options include: <ul style="list-style-type: none"> • Edit level data • Download list of customers details assigned to this level

Customers assigned to level list

You can simply view not only the number but also the list of customers with details assigned to particular level.

To display the list of customers:

3. On the Admin sidebar, tap **Levels**. Then, choose **All levels**.
4. In the levels list, find the level you want to see customers list and click **Show** in the **Customers** column. After clicking, the list of customers will be opened, filtered according to the assigned level.

First name	Last name	Phone	E-mail	Actions
Lynn	Nicely	not set	nicely@me.com	
Anderson	Ebert	not set	connie.boehm@example.net	
Ima	Kuphal	not set	marley.bernhard@example.com	
Reba	Vandervert	not set	hodkiewicz.reba@example.net	
Bernadette	Walter	not set	wnder@example.com	
Roslyn	Wilderman	not set	gflatley@example.net	
Scottie	Smitzham	not set	turcotte.kelli@example.net	
Ray	Kuhic	not set	sandrine.champlin@example.org	
Jonas	Feeest	not set	genevieve.polich@example.org	
Colten	Johns	not set	fgreen@example.com	

Showing 1 up to 10 from 42 entries.

List of Customers in Level VIP

Use the standard controls to sort the list, filter and search customer by typing in the field under column header value you want to find, and apply actions to selected customers (edit and view). Pagination controls appear if there are more customer records than fit on the page, and are used to move from one page to the next.

Download the Customers list

There is also possibility to download a list of customers to a CSV file.

To download the list of customers assigned to a level:

1. On the Admin sidebar, tap **Levels**. Then, choose **All levels**
2. In the levels list, find the level you want to download customers list and click **Download** () icon in the **Action** column.

After clicking, the list of customers will be download in .CSV format.

CHAPTER 9:

CREATING CUSTOMER LEVEL

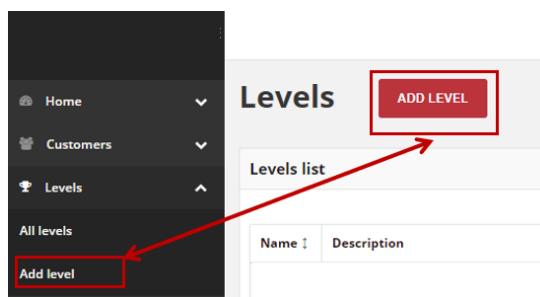
You can create unlimited amount customizable customers levels for your loyalty program based on various conditions.

The screenshot shows the 'Add level' form within the Admin sidebar. The sidebar menu includes Home, Customers, Levels, All levels, Add level, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, and Reward campaigns. The 'Add level' button is highlighted. The main form has sections for Basic Informations, Reward details, and Special reward details, each with input fields. Buttons for 'SAVE' and 'CANCEL' are at the bottom.

Add New Level

To create a New Customer Level :

3. On the Admin sidebar, tap **Levels**. Then, choose **Add level**. You can also add level directly from **All levels** list by clicking **Add level** at the top of the page.



Add Level Options

Add level

Basic Informations	
Name *	<input type="text"/>
Active	<input type="button" value="Inactive"/>
Description	<input type="text"/>
Condition value *	<input type="text"/>
Min order value	<input type="text"/>
Reward details	
Reward name *	<input type="text"/>
Reward value *	<input type="text"/>
Reward code *	<input type="text"/>
Special reward details	
<input type="button" value="SAVE"/> <input type="button" value="CANCEL"/>	

Add Level Form

4. In **Basic Information** section do the following:

- a. Enter a unique level **Name** to identify the customer level
- b. To activate the customer level, in **Active** field select “**Active**” from the dropdown list
- c. Enter a brief **Description** that explain purpose of the level for internal reference
- d. Depending on the configuration, set **Condition value** as a minimum points value or minimum transaction amount needed to be achieved to be assigned to this level

To check whether customer levels should be calculated based on points or transaction see Configuration settings

- e. If applicable, enter **Min order value** that need to be exceeded to add points/transaction value to sum.

5. In **Reward detail** section do the following:
 - a. In **Reward name** provide a brief description that explain purpose of the reward. For example, 15% off for every purchase
 - b. In **Reward value** field enter a discount value for level reward. For example, value 15 means 15% discount
 - c. Enter a **Reward code** to be used by customers assigned to this level authorizing to **Reward value**.
6. If you want to give special discount for Customer but only in limited time, complete the **Special reward details** section. To learn how to assigned special reward to particular level, see **Special Rewards**
7. When complete, tap **Save**

Updating levels data

You can edit all data provided during level creation process. You can update level data by selecting it's record from **All levels** list.

Edit VIP

Basic Informations

Name *	<input type="text" value="VIP"/>
Active	<input style="border: 1px solid #ccc; padding: 2px 10px; width: 150px; height: 25px; border-radius: 5px; background-color: #fff; font-size: 10px; font-weight: bold; color: #000; text-decoration: none; text-align: center; margin-bottom: 5px;" type="button" value="Active"/>
Description	<input type="text" value="Customers who spend more than 5000 EUR"/>
Condition value *	<input type="text" value="5000"/>
Min order value	<input type="text" value=""/>

Reward details

Reward name *	<input type="text" value="20% off for every purchase and additional rewards"/>
Reward value *	<input type="text" value="30"/>
Reward code *	<input type="text" value="45678"/>

Special reward details

Level Edition

To edit a level:

1. On the Admin sidebar, tap **Levels**. Then, choose **All levels**.
2. In the Levels list, find the record to be edited and click **Edit** () icon in the Action column to open the record in edit mode.
3. Make any necessary changes to the level data
4. When complete, tap **Save**

Activate/deactivate a level

Any levels from the list can be activated and deactivated by Admin user.

To activate/deactivate level:

1. On the Admin sidebar, tap **Levels**. Then, choose **All levels**. You can also deactivate/activate level from **Edit mode**
2. In the levels list, find the level to be deactivated and click **Active** in the **Active** column. The button in the column change to **Inactive** and appear as a grey-out.

Active
INACTIVE
ACTIVE
ACTIVE
ACTIVE

Active Column

When you deactivate levels, customers accounts assigned to this level will be still display level name but redeeming rewards and special rewards assigned to this level will not be possible.

5. To activate the level click **Inactive** in the **Active** column. The button in the column change to **Active** and appears as a red.

Customer can be assigned only to Active levels

Special rewards

Special reward should be set if you want to give special discount for customer but only limited in time.

Reward details

Reward name *

Reward value *

Reward code *

Special reward details

Active

Reward name *

Value *

Reward code *

Start at *

End at *

ADD SPECIAL REWARD

SAVE CANCEL

Add Special Reward

To assigned special rewards to level:

1. Open Add Level Form as described in previous point
2. Go to **Special reward details** section and click **Add special reward**. Then do the following:

Special reward details

Active

Reward name *

Mother's Day 2016

Value *

20

Reward code *

89011

Start at *

2016-05-25

End at *

2016-05-26

Special Reward Details

- a. To activate the level special reward, in **Active** field select “**Active**” from the dropdown list
 - b. Enter a **Reward name** as a brief description that explain purpose of the reward creation. For example, Woman's day
 - c. Enter discount **Value** for special reward. For example, value 20 means 20% discount
 - d. Enter a **Reward code** to be used by customers assigned to this level authorizing to special reward **Value**.
 - e. In **Start at** and **End at** fields specify time boundaries when special reward will be visible and active.
3. Repeat the steps for all special rewards you want to assigned to this level
4. When complete, tap **Save**
5. You can simply remove special reward by clicking bin () icon in a particular box

POINTS TRANSFERS

This section of the guide walks you through the basic points transfer information. You will learn how to add and manage transfer of loyalty points records and finally better understand all terms related to points transfer.

POINTS TRANSFERS MENU

All points transfers

Deleting points transfer

Creating points transfer

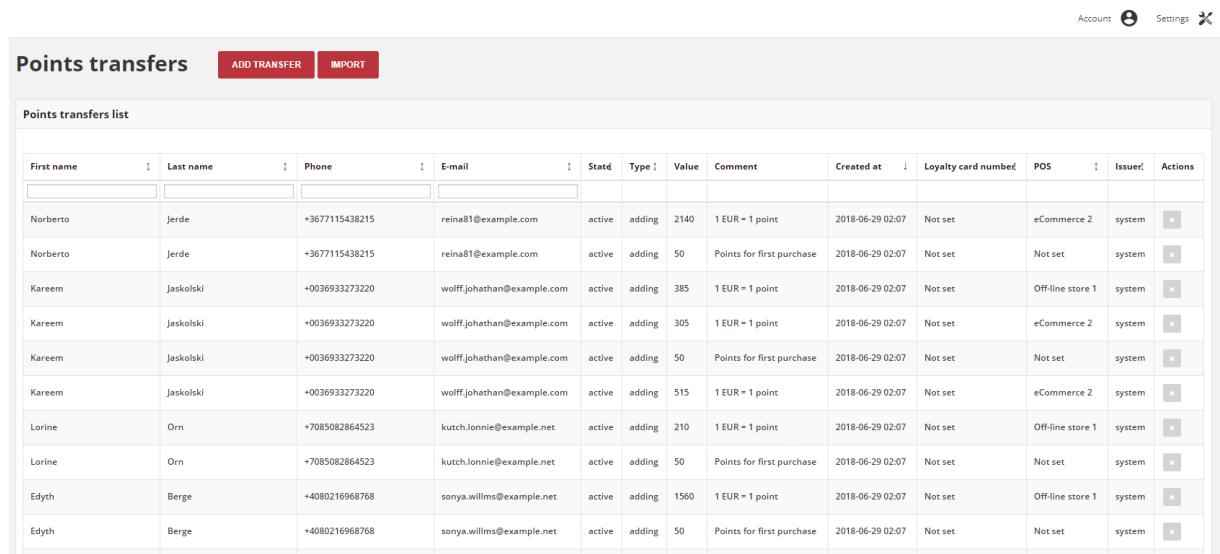
Import points transfers

XML file structure

CHAPTER 10:

POINTS TRANSFERS MENU

The Points Transfers section lists all – system and imported, increasing and decreasing sum of loyalty points assigned to customer account points transfers that has taken place between your customers account and Open Loyalty, and provides access to more detailed information.



The screenshot shows the 'Points transfers' page with a header containing 'Account' and 'Settings'. Below the header is a search bar with placeholder text 'Search transfers' and a 'Clear' button. Underneath the search bar is a table titled 'Points transfers list' with the following columns: First name, Last name, Phone, E-mail, State, Type, Value, Comment, Created at, Loyalty card number, POS, Issuer, and Actions. The table contains 10 rows of data, each representing a transfer record with details such as date, value, and source/destination.

First name	Last name	Phone	E-mail	State	Type	Value	Comment	Created at	Loyalty card number	POS	Issuer	Actions
Norberto	Jerde	+3677115438215	reina81@example.com	active	adding	2140	1 EUR = 1 point	2018-06-29 02:07	Not set	eCommerce 2	system	
Norberto	Jerde	+3677115438215	reina81@example.com	active	adding	50	Points for first purchase	2018-06-29 02:07	Not set	Not set	system	
Kareem	Jaskolski	+0036933273220	wolff.johathan@example.com	active	adding	385	1 EUR = 1 point	2018-06-29 02:07	Not set	Off-line store 1	system	
Kareem	Jaskolski	+0036933273220	wolff.johathan@example.com	active	adding	305	1 EUR = 1 point	2018-06-29 02:07	Not set	eCommerce 2	system	
Kareem	Jaskolski	+0036933273220	wolff.johathan@example.com	active	adding	50	Points for first purchase	2018-06-29 02:07	Not set	Not set	system	
Kareem	Jaskolski	+0036933273220	wolff.johathan@example.com	active	adding	515	1 EUR = 1 point	2018-06-29 02:07	Not set	eCommerce 2	system	
Lorine	Orn	+7085082864523	kutch.lonnie@example.net	active	adding	210	1 EUR = 1 point	2018-06-29 02:07	Not set	Off-line store 1	system	
Lorine	Orn	+7085082864523	kutch.lonnie@example.net	active	adding	50	Points for first purchase	2018-06-29 02:07	Not set	Not set	system	
Edyth	Berge	+4080216968768	sonya.willms@example.net	active	adding	1560	1 EUR = 1 point	2018-06-29 02:07	Not set	Off-line store 1	system	
Edyth	Berge	+4080216968768	sonya.willms@example.net	active	adding	50	Points for first purchase	2018-06-29 02:07	Not set	Not set	system	

Points Transfers

To display the Points Transfers menu:

On the Admin sidebar, tap **Points transfers**, then choose **All points transfers**.

All points transfers

The Points transfers lists gives you information about value of earned and spent points by particular customer with details regarding customers and transfer process. Moreover, list contains information whether points are the result of Earning Points Rules (system) or they have been manually set by the Admin user (admin).

To learn more about Earning Points Rule, see **Rules details**

Points transfers												ADD TRANSFER	IMPORT
Points transfers list													
First name	Last name	Phone	E-mail	State	Type	Value	Comment	Created at	Loyalty card number	POS	Issuer	Actions	
Norberto	Jerde	+3677115438215	reina81@example.com	active	adding	2140	1 EUR = 1 point	2018-06-29 02:07	Not set	eCommerce 2	system	Edit	
Norberto	Jerde	+3677115438215	reina81@example.com	active	adding	50	Points for first purchase	2018-06-29 02:07	Not set	Not set	system	Edit	
Kareem	Jaskolski	+0036933273220	wolff.johathan@example.com	active	adding	385	1 EUR = 1 point	2018-06-29 02:07	Not set	Off-line store 1	system	Edit	
Kareem	Jaskolski	+0036933273220	wolff.johathan@example.com	active	adding	305	1 EUR = 1 point	2018-06-29 02:07	Not set	eCommerce 2	system	Edit	
Kareem	Jaskolski	+0036933273220	wolff.johathan@example.com	active	adding	50	Points for first purchase	2018-06-29 02:07	Not set	Not set	system	Edit	
Kareem	Jaskolski	+0036933273220	wolff.johathan@example.com	active	adding	515	1 EUR = 1 point	2018-06-29 02:07	Not set	eCommerce 2	system	Edit	
Lorine	Orn	+7085082864523	kutch.lonnie@example.net	active	adding	210	1 EUR = 1 point	2018-06-29 02:07	Not set	Off-line store 1	system	Edit	
Lorine	Orn	+7085082864523	kutch.lonnie@example.net	active	adding	50	Points for first purchase	2018-06-29 02:07	Not set	Not set	system	Edit	
Edyth	Berge	+4080216968768	sonya.willms@example.net	active	adding	1560	1 EUR = 1 point	2018-06-29 02:07	Not set	Off-line store 1	system	Edit	
Edyth	Berge	+4080216968768	sonya.willms@example.net	active	adding	50	Points for first purchase	2018-06-29 02:07	Not set	Not set	system	Edit	

Points Transfers List

Use the standard controls to sort the list, filter and search transfers by typing in the field under column header value you want to find, and apply actions to selected transfers records. Pagination controls appear if there are more transfer records than fit on the page, and are used to move from one page to the next.

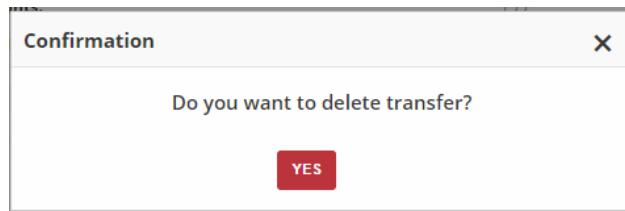
Field description

FIELD	DESCRIPTION
First name	The first name of customer referred to transfer
Last name	The last name of customer referred to transfer
Phone	The customer referred to transfer phone number
E-mail	The customer referred to transfer email address
State	Transferred points state: Active - points are available to spend Expired - points expired and cannot be used to redeem reward Canceled – points are subtracted from the pool of Active Points as a result of canceling the points transfer
Type	Transfer operation type: Adding – customer earn point for transaction or other activity Spending – customer spent points for campaign reward
Value	Amount of points earned/spent within the transfer
Comment	Show details about transfer, e.g. for what Customer gets points, for what Customer spend points. Field is automatically filled in with the reward campaign name when the customer spends points for the reward using his account.

	If transfer is created manually by Admin user, field is filled in with information provided by the Admin during transfer creation.
Created at	Date when points transfer was made
Loyalty card number	Customer loyalty card number linked with transfer
POS	Which of POS processed transaction upon which points were calculated
Issuer	Define who create Transfer operation. Option include: system/admin
Actions	The remove operations that can be applied to selected transfer record

Deleting points transfer

To cancel points transfer click **Remove** () icon in the Action column. System will display a message asked you to confirm the action.



Removing Transfer Action

After canceling, no action to canceled transfer record will be longer available and the **Remove** () icon background change color to blue. The same situation deal with Points transfers with "spending" type.

State	Type	Value	Comment	Created at	Loyalty card number	POS	Issuer	Actions
active	spending	20	Free delivery, coupon: 6	2018-05-23 15:33	Not set	Not set	system	
active	spending	100	Invitation for the event, coupon: 1	2018-05-23 12:19	Not set	Not set	system	
active	spending	20	Free delivery, coupon: 5	2018-05-22 12:23	Not set	Not set	system	
cancelled	adding	100	For driving license	2018-05-22 12:13	Not set	Not set	admin	
active	adding	5		2018-05-22 10:42	Not set	Not set	system	
active	adding	5		2018-05-22 07:21	Not set	Not set	system	
active	adding	5		2018-05-21 19:34	Not set	Not set	system	

Deleting Transfers Icons

Creating points transfer

Customers usually earn and spend points within Open Loyalty system – points are added for transaction and activity based on Earning Points Rules and spent for Reward Campaigns selected by customer within customer cockpit . However, you can also create customer points transfer directly from the Admin, which is useful in case of ad-hoc special situation e.g. long delivery delay, the biggest purchase among customers in year etc.

The screenshot shows the 'Points transfers' page with a modal window open for 'Add Points Transfer'. The modal has tabs for 'ADD TRANSFER' and 'IMPORT'. The 'ADD TRANSFER' tab is active. The form fields include:

- Transfer type *: Spend points (selected)
- Select customer *: Search bar (enter email or phone to search)
- Points to add/spend *: Input field
- Comment: Input field
- SAVE button

On the left, there is a 'Points transfers list' table with columns 'First name' and 'Last name'. It contains five rows of data:

First name	Last name
Norberto	Jerde
Norberto	Jerde
Kareem	Jaskolski
Kareem	Jaskolski

Add Points Transfer

To add points transfer manually:

1. On the Admin sidebar, tap **Points transfers**. Then, choose **All points transfers**
2. Tap **Add transfer** at the top of the page. Then, do the following:
 - a. From the dropdown list choose **Transfer type**:
 - If you want to subtract points select **Spend points**
 - If you want to add points select **Add points**
 - c. **Select customer** account for which points transfer will be deal with. Enter few letters/signs of customer name/surname/phone. System display the list of all matching customer record.

The screenshot shows the 'Points transfer' modal with the 'Spend points' transfer type selected. The 'Select customer' dropdown is open, showing a list of results for the search term 'jon':

- jon75@example.net (+9363340294124)
- jones.kayi@example.net (+2262206427804)
- djones@example.com (+5876707228044)

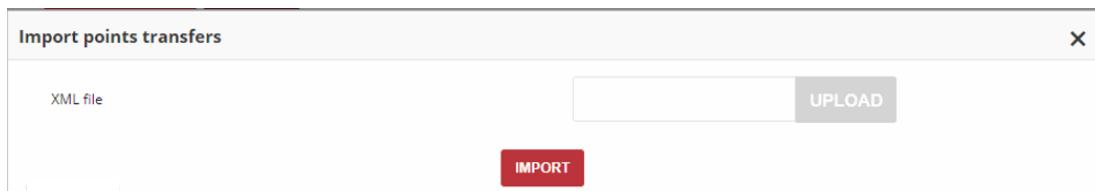
The 'Comment' input field is empty. At the bottom right is a 'SAVE' button.

Select Customer

- c. In Points to add/spend field enter amount of points that will be added to/ subtracted from Customer Account active Points
 - d. If needed, provide a **Comment** for operation as a brief description that explain purpose of the transfer e.g. information on what they were spent or why they were subtracted
3. When complete, tap **Save**

Import points transfers

If you have a customer list that you want to add points within your Loyalty Program, you can enter it into a Points transfer XML file and then import it in your Open Loyalty Admin.



Import Points Transfers

Importing a XML file will create a points transfers for each customer email address or phone number in the file.

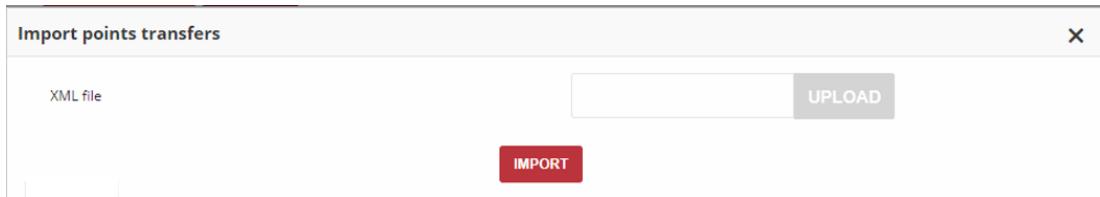
To import a points from a file:

1. On the Admin sidebar, tap **Points transfers**. Then, choose **All points transfers**
2. Click **Import** at the top of the page, next to **Add transfer**



Points Import Button

3. In the **Import points transfers** dialog, click **Upload** and then choose your customer XML file.



Import Points Transfers

4. When file selected, click **Import**

The points transfers details of customers whose you've added to the XML file will appear in the All points transfers list in your Open Loyalty admin.

XML file structure

Example of Points transfer XML file structure below:

```
<?xml version="1.0" encoding="UTF-8"?>
<pointsTransfers>
    <pointsTransfer>
        <customerId>00000000-0000-474c-b092-b0dd880c07e2</customerId>
        <points>12</points>
        <type>adding</type>
    </pointsTransfer>
    <pointsTransfer>
        <customerId>00000000-0000-474c-b092-b0dd880c07e2</customerId>
        <points>50</points>
        <type>spending</type>
    </pointsTransfer>
</pointsTransfers>
```

TRANSACTIONS

In this section of the guide, you'll learn how to manage all aspects of the transaction, including matching transaction with customer and better understanding of terms and transaction process.

TRANSACTIONS MENU

All transactions

Transaction details

Returns

Match transaction with customer

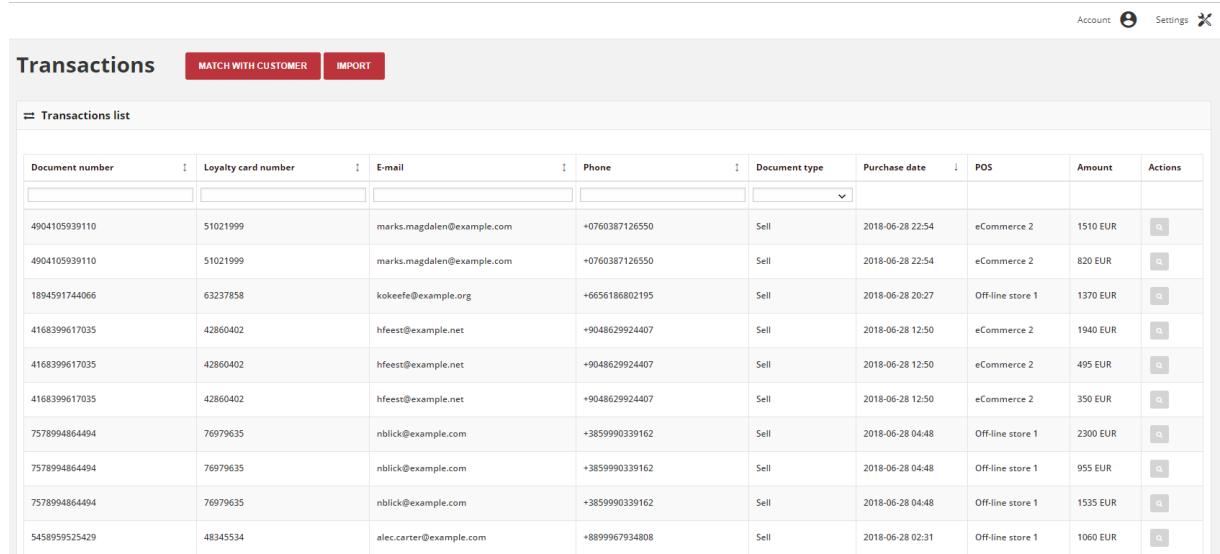
Import transactions

XML file structure

CHAPTER 11:

TRANSACTIONS MENU

The Transactions grid lists all (system and imported) payment activity that has taken place between your store system and customers, and provides access to more detailed information about purchased items and transaction itself.



The screenshot shows a web-based administration interface for managing transactions. At the top, there are navigation links for 'Account' (with a user icon), 'Settings' (with a gear icon), and a close button (X). Below the header, a search bar contains the text 'Transactions'. To the right of the search bar are two buttons: 'MATCH WITH CUSTOMER' and 'IMPORT'. Underneath the search bar, a sub-header reads 'Transactions list'. The main area is a table with the following columns: Document number, Loyalty card number, E-mail, Phone, Document type, Purchase date, POS, Amount, and Actions. The table contains ten rows of transaction data, each with a small magnifying glass icon in the 'Actions' column. The data in the table is as follows:

Document number	Loyalty card number	E-mail	Phone	Document type	Purchase date	POS	Amount	Actions
4904105939110	51021999	marks.magdalen@example.com	+0760387126550	Sell	2018-06-28 22:54	eCommerce 2	1510 EUR	
4904105939110	51021999	marks.magdalen@example.com	+0760387126550	Sell	2018-06-28 22:54	eCommerce 2	820 EUR	
1894591744066	63237858	kokeefe@example.org	+6656186802195	Sell	2018-06-28 20:27	Off-line store 1	1370 EUR	
4168399617035	42860402	hfeest@example.net	+9048629924407	Sell	2018-06-28 12:50	eCommerce 2	1940 EUR	
4168399617035	42860402	hfeest@example.net	+9048629924407	Sell	2018-06-28 12:50	eCommerce 2	495 EUR	
4168399617035	42860402	hfeest@example.net	+9048629924407	Sell	2018-06-28 12:50	eCommerce 2	350 EUR	
7578994864494	76979635	nblick@example.com	+3859990339162	Sell	2018-06-28 04:48	Off-line store 1	2300 EUR	
7578994864494	76979635	nblick@example.com	+3859990339162	Sell	2018-06-28 04:48	Off-line store 1	955 EUR	
7578994864494	76979635	nblick@example.com	+3859990339162	Sell	2018-06-28 04:48	Off-line store 1	1535 EUR	
54589959525429	48345534	alec.carter@example.com	+8899967934808	Sell	2018-06-28 02:31	Off-line store 1	1060 EUR	

Transactions

To display the Transactions menu:

On the Admin sidebar, tap **Transactions**, then choose **All transactions**.

All transactions

The All transactions lists gives you information about type and value of all payment activity referred to customer. Moreover, list contains detail information about store and date when transaction was made, transaction internal number and allows to preview transaction and purchased items detail.

Document number	Loyalty card number	E-mail	Phone	Document type	Purchase date	POS	Amount	Actions
490410539110	51021999	marks.magdalen@example.com	+0760387126550	Sell	2018-06-28 22:54	eCommerce 2	1510 EUR	q
490410539110	51021999	marks.magdalen@example.com	+0760387126550	Sell	2018-06-28 22:54	eCommerce 2	820 EUR	q
1894591744066	63237858	kokeefe@example.org	+6656186802195	Sell	2018-06-28 20:27	Off-line store 1	1370 EUR	q
4168399617035	42860402	hfeest@example.net	+9048629924407	Sell	2018-06-28 12:50	eCommerce 2	1940 EUR	q
4168399617035	42860402	hfeest@example.net	+9048629924407	Sell	2018-06-28 12:50	eCommerce 2	495 EUR	q
7578994864494	76979635	nblick@example.com	+3859990339162	Sell	2018-06-28 04:48	Off-line store 1	2300 EUR	q
7578994864494	76979635	nblick@example.com	+3859990339162	Sell	2018-06-28 04:48	Off-line store 1	955 EUR	q
7578994864494	76979635	nblick@example.com	+3859990339162	Sell	2018-06-28 04:48	Off-line store 1	1535 EUR	q
5458959525429	48345534	alec.carter@example.com	+889967934808	Sell	2018-06-28 02:31	Off-line store 1	1060 EUR	q

Transactions List

Use the standard controls to sort the list by Purchase date, filter and search transfers by typing in the field under column header value you want to find, and apply action (preview) to selected transaction records. Pagination controls appear if there are more transaction records than fit on the page, and are used to move from one page to the next.

Field description

FIELD	DESCRIPTION
Document number	Unique transaction ID from your store internal system (e.g. e-commerce)
Loyalty card number	Number of customer loyalty card related to the transaction If transaction is linked with customer account
E-mail	Email address of customer related to the transaction
Phone	Phone number of customer related to the transaction
Document type	Transaction type: <ul style="list-style-type: none"> • Sell – customer buy products • Return – customer return bought products
Purchase date	Valid date of transaction
POS	POS where transaction was made
Amount	The amount of the transaction

Actions	Open transaction record in view mode to see customers and purchased items details
----------------	---

Transaction details

Click **View** () icon in the Action column to open the transaction details – customer detail information and purchased items.

Transaction details		X
Customer name:	Vincenzo Zulauf	
Phone:	+0760387126550	
E-mail:	marks.magdalena@example.com	
Loyalty card number:	51021999	
City:	Runolfsdottir town	
State:	Virginia	
Street:	Spencer Shore	
Building name:	6831	
Postal code:	86552	
Country:	PL	
Purchase date:	2018-06-28 22:54	
Transaction id:	4904105939110	
Points earned:	1510	
POS name:	eCommerce 2	
Document type:	Sell	

Item details

Name	Quantity	SKU	Category	Gross value	Labels	Brand
French Cuff Cotton Twill Oxford	3	msj001	Men/Shirts	570EUR	promotion:New product	Piazza Sempione
Carroll Check Dress Shirt	1	Pms003xs		160EUR	promotion:Last pieces in stock	Gabriela Hearst
Hester Ankle Pant	3	Pwb00629		780EUR	promotion:New product	Piazza Sempione
SUM				1510EUR		

Transaction Record Preview

Field description

FIELD	DESCRIPTION
TRANSACTION DETAILS	
Customer name	First and last name of customer related to the transaction
Phone	Phone number of customer related to the transaction
Email	Email address of customer related to the transaction
Loyalty card number	Number of customer loyalty card related to the transaction If transaction is linked with customer account
City	The city where the customer resides at this address
State	The state or province of the customer at this address
Street	The street address of the customer
Building name	The name/number of a building or property where the customer resides at this address
Postal code	The postal code of the customer at this address
Country	The country where customer resides at this address
Purchase date	Valid date of transaction
Transaction ID	Unique transaction ID from your store internal system (e.g. e-commerce). The same value like in Document number field.
Points earned	How many points Customer earned/lose for this transaction (order). Transaction with the type "Sell" adds points, and "Return" subtracts
POS name	POS where transaction was made
Document type	<p>Transaction type:</p> <ul style="list-style-type: none"> • Sell – customer buy products • Return – customer return bought products
ITEM DETAILS	
Name	Bought product name
Quantity	Bought product quantity
SKU	Bought product SKU
Category	Bought product category
Gross value	Gross value of bought product
Labels	Bought product label, if assigned
Brand	Bought product brand, if assigned
SUM	Total amount of bought products within one transaction

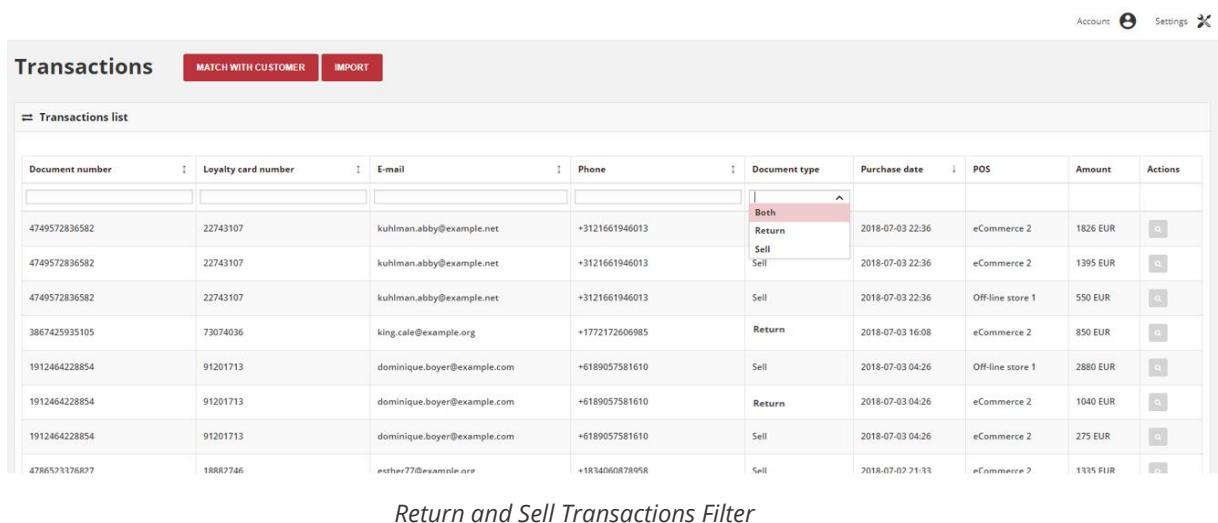
Returns

If for any reason the customer returns the purchased products and claims a refund a Return transaction is created. Customer can request a return from both, online and offline stores and both, partial or full refund. Typically, customer contacts the merchant to request a refund. If merchant authorize the return and agree for refund, a unique document number of related sell transaction is required to identify the returned products and sell transaction, that caused the points earned.

The **All transactions** menu lists all – return and sell transactions. To see only returns, you have to filter the list.

To display Return transactions:

1. On the Admin sidebar, tap **Transactions**. Then, choose **All transactions**.
2. In the field under **Document type** column header, click on the arrow.
3. To see only returns, choose **Return** from dropdown list



Document number	Loyalty card number	E-mail	Phone	Document type	Purchase date	POS	Amount	Actions
4749572836582	22743107	kuhlman.abby@example.net	+3121661946013	Both	2018-07-03 22:36	eCommerce 2	1826 EUR	Edit
4749572836582	22743107	kuhlman.abby@example.net	+3121661946013	Return	2018-07-03 22:36	eCommerce 2	1395 EUR	Edit
4749572836582	22743107	kuhlman.abby@example.net	+3121661946013	Sell	2018-07-03 22:36	Off-line store 1	550 EUR	Edit
3867425935105	73074036	king.cale@example.org	+1772172606985	Return	2018-07-03 16:08	eCommerce 2	850 EUR	Edit
1912464228854	91201713	dominique.boyer@example.com	+6189057581610	Sell	2018-07-03 04:26	Off-line store 1	2880 EUR	Edit
1912464228854	91201713	dominique.boyer@example.com	+6189057581610	Return	2018-07-03 04:26	eCommerce 2	1040 EUR	Edit
1912464228854	91201713	dominique.boyer@example.com	+6189057581610	Sell	2018-07-03 04:26	eCommerce 2	275 EUR	Edit
4786537376807	18882746	esther77@example.net	+183406079095	Sell	2018-07-02 21:33	eCommerce 2	1325 EUR	Edit

Return and Sell Transactions Filter

When Returns are enable (see **Configuration** section), if the customer made a Return, in addition to subtracting the transaction value from the total value of transactions assigned to Customer, the number of earned points assigned to a given sell transaction is also reversed.

The reversed points will be listed in **All points transfers** menu with **Type spending** and information in **Comment** column, that they are result of return transaction.

First name	Last name	Phone	E-mail	Status	Type	Value	Comment	Created at	Loyalty card number	POS	Issue	Actions
John	Doe	+48234234000	user@oloy.com	active	adding	5	Points after check-in	2018-07-04 10:29	Not set	Not set	system	Edit
John	Doe	+48234234000	user@oloy.com	active	adding	5	Points after check-in	2018-07-04 10:29	Not set	Not set	system	Edit
John	Doe	+48234234000	user@oloy.com	active	adding	5	Points after check-in	2018-07-04 09:35	Not set	Not set	system	Edit
John	Doe	+48234234000	user@oloy.com	active	adding	5	Points after check-in	2018-07-04 09:19	Not set	Not set	system	Edit
Cielo	Christiansen	+6600661834869	tierra.leuschke@example.com	active	adding	2550	1 EUR = 1 point	2018-07-04 09:18	Not set	Off-line store 1	system	Edit
Cielo	Christiansen	+6600661834869	tierra.leuschke@example.com	active	adding	50	Points for first purchase	2018-07-04 09:18	Not set	Not set	system	Edit
Cielo	Christiansen	+6600661834869	tierra.leuschke@example.com	active	adding	1486	1 EUR = 1 point	2018-07-04 09:18	Not set	eCommerce 2	system	Edit
Cielo	Christiansen	+6600661834869	tierra.leuschke@example.com	active	adding	780	1 EUR = 1 point	2018-07-04 09:18	Not set	Off-line store 1	system	Edit
Destin	McKenzie	+8803624295461	nicola.nikolaus@example.net	active	adding	2770	1 EUR = 1 point	2018-07-04 09:18	Not set	eCommerce 2	system	Edit

Points Transfer as a Result of Return Transaction

After the return, points are subtracted from the pool of Active points, according to the number of points earned within sell transaction and in proportion to the amount of transaction.

Points are not reversed according to points earned for bought specific products but in proportion to the all transaction amount (including all bought products)

For better understanding please see Example below

Example:

Your customer transaction value is 40 € and include following products:

- Product A – 10 €
- Product B – 10 €
- Product C – 20 €

For following transactions and purchase of these products your customer has earned the value of points as below:

- Product A – 10 points (for bought specific products)
- Product B – 20 points (for bought specific product)
- Product C – 0 points
- 40 points for total transaction value (1€ spend = 1 point earned)

*So in total customer spent 40 € and earned 70 points. Points were added to his **Active points** pool, and transaction value to total amount of his registered transaction value (**CLV** attribute).*

For some reason, he decided to return Product C, which cost 20 €, which is a half of the total transaction value.

*And exactly in the same proportion will be calculated the value of points that will be subtracted. For this transaction he earned 70 points, so half of them – 35 points will be subtracted from the **Active points** pool.*

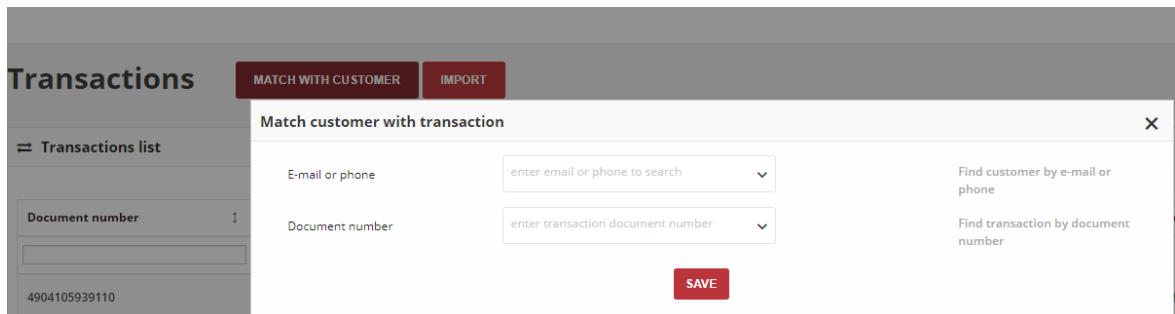
Note, that the transaction value also affects to the **Levels** and **Segments**, which criteria are based on this value. Customer can return to previous level or not be included in a given segment when transaction, which caused this promotion, will be returned.

For more information please see **Levels** and **Segments** chapters.

Match transaction with customer

Usually, transaction come from your store system with information about customer related with. However, you can link transaction with Customer Account directly from the Admin in Open Loyalty, which is useful when you send to Open Loyalty only transactions.

Depending on Matching transaction with customer identification factors priority (set up in Configuration) customer email, phone number or/and loyalty card number can be used. To remain about identification factors please see [Configuration](#)

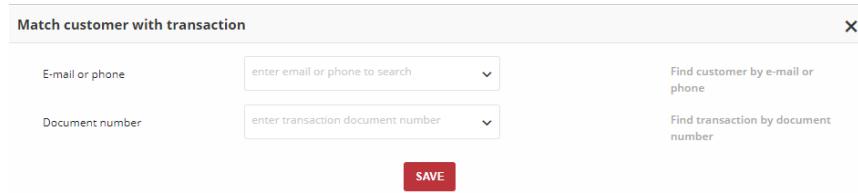


The screenshot shows the 'Transactions' page in the Admin interface. At the top, there are two buttons: 'MATCH WITH CUSTOMER' (highlighted in red) and 'IMPORT'. Below these buttons is a modal window titled 'Match customer with transaction'. The modal contains two input fields: 'E-mail or phone' and 'Document number', each with a dropdown menu labeled 'enter email or phone to search' and 'enter transaction document number'. To the right of the input fields are two links: 'Find customer by e-mail or phone' and 'Find transaction by document number'. A red 'SAVE' button is located at the bottom right of the modal.

Match Customer Account with Transaction

To match transaction with customer:

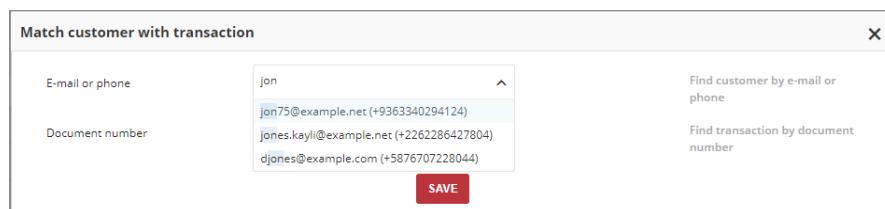
4. On the Admin sidebar, tap **Transactions**. Then, choose **All transactions**.
5. Tap **Match with customer** at the top of the page. Then, do the following:



The screenshot shows the 'Match customer with transaction' modal. It has two input fields: 'E-mail or phone' and 'Document number', each with a dropdown menu. To the right of the input fields are two links: 'Find customer by e-mail or phone' and 'Find transaction by document number'. A red 'SAVE' button is at the bottom.

Matching Transaction

- a. Enter **E-mail or phone** to find customer, which you want to associate with the transaction



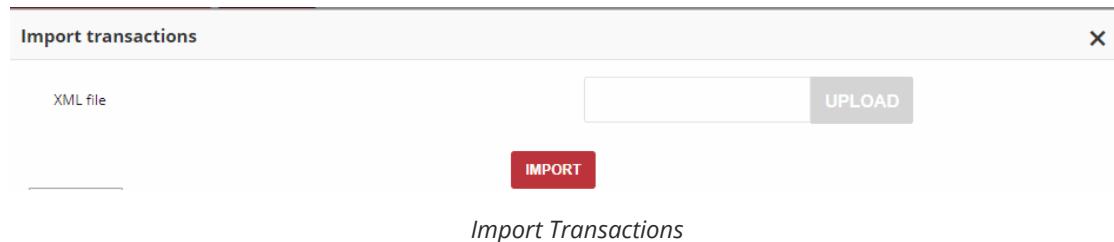
The screenshot shows the 'Match customer with transaction' modal with the 'E-mail or phone' input field populated with 'jon'. A dropdown menu lists three customer entries: 'jon75@example.net (+9363340294124)', 'jones.kayl@example.net (+2262286427804)', and 'djones@example.com (+5876707228044)'. To the right of the input fields are two links: 'Find customer by e-mail or phone' and 'Find transaction by document number'. A red 'SAVE' button is at the bottom.

Matching Customer List

- b.** Enter transaction **Document number** (transaction ID), which you want to associate with the customer
 - c.** In the both fields:
 - To find a close match, enter few letters/signs of what you want to find
 - To find an exact match, enter the exact word/number you want to find.
- 3.** When complete, tap **Save**

Import transactions

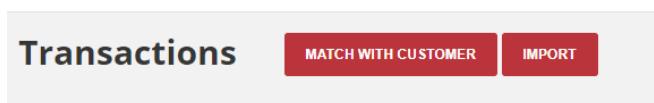
If you have a transaction that you want to add within your Loyalty Program, you can enter it into a transactions XML file and then import it in your Open Loyalty Admin.



Importing a XML file will create a transactions for each record in the file.

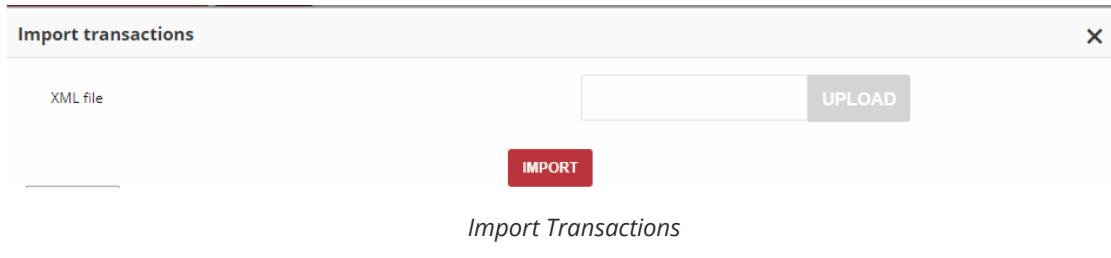
To import a transaction from a file:

1. On the Admin sidebar, tap **Transactions**. Then, choose **All transactions**
2. Click **Import** at the top of the page, next to **Match with customer**



Transactions Import Button

- 3.** In the **Import transactions** dialog, click **Upload** and then choose your customer XML file.



4. When file selected, click **Import**

The transactions records which you've added to the XML file will appear in the All transactions list in your Open Loyalty admin

XML file structure

Example of Transaction XML file structure below:

```
<?xml version="1.0" encoding="UTF-8"?>
<transactions>
    <transaction>
        <documentNumber>1111.6</documentNumber>
        <purchasePlace>Wroclaw</purchasePlace>
        <purchaseDate>2018-08-15T15:52:01+00:00</purchaseDate>
        <documentType>sell</documentType>
        <posId>00000000-0000-474c-1111-b0dd880c07e2</posId>
        <customer>
            <name>John Doe</name>
            <email>jdoe@example.com</email>
            <nip>123-12-22-123</nip>
            <phone>48231231232</phone>
            <loyaltyCardNumber>12982332</loyaltyCardNumber>
            <address>
                <street> Main road</street>
                <address1>123</address1>
                <city>Wroclaw</city>
                <country>PL</country>
            
```

```
<province>Dolnoslaskie</province>
<postal>45-123</postal>
</address>
</customer>
<items>
<item>
<sku>
<code>SKU1</code>
</sku>
<name>Item 1</name>
<quantity>1</quantity>
<grossValue>100</grossValue>
<category>category1</category>
<maker>maker</maker>
<labels>
<label>
<key>key1</key>
<value>value1</value>
</label>
</labels>
</item>
<item>
<sku>
<code>SKU2</code>
</sku>
<name>Item 2</name>
<quantity>3</quantity>
<grossValue>300</grossValue>
<category>category2</category>
<maker>maker</maker>
<labels>
<label>
```

```
<key>key3</key>
<value>value3</value>
</label>
</labels>
</item>
</items>
</transaction>
```

EARNING POINTS RULES

This section of the guide provides an overview of the ways for customers to earn points – the engine of your Loyalty Program. You'll learn how to create and manage Earning Points Rule to accomplish many things, from rewarding high-value customers, to stopping points earning all together.

EARNING POINTS RULES MENU

All earning points rules

CREATING EARNING POINTS RULE

Updating Earning points rules

Activate/deactivate earning points rule

EARNING POINTS RULES TYPES

Custom event rule

Customer Referral

Event rule

General spending rule

Multiply earned points

Product purchase

Multiply earned points by product labels

CHAPTER 11:

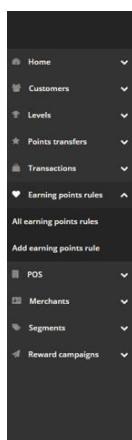
EARNING POINTS RULES MENU

Earning Points Rule define ways and conditions for customers to earn points.

Points can be awarded for a wide range of transaction and customer activities, and the configuration can be set to control the point allotment, balance, and expiration.

You can add point multipliers, eligibility criteria and even exclude certain products or customers.

Customers can redeem points toward rewards, based on the condition (points cost) that you establish.



The screenshot shows the 'Earning points rules' section of the Admin sidebar. Under 'All earning points rules', there is a link to 'Add earning points rule'. The main area displays a table of existing rules:

Name	Description	Active	Start at	End at	Type	Actions
Points after registration	Customers earn 100 points after registration to loyalty program	ACTIVE			Is all time active	Event rule
1 EUR = 1 point	Customers earn 1 point after spending 1 EUR for purchases registered in loyalty program	ACTIVE			Is all time active	General spending rule
Additional points for shopping on Black Friday	Customers earn 1 additional point after spending 1 EUR for purchases registered in loyalty program during Black Friday	ACTIVE	2016-12-02 01:00	2016-12-02 23:00	General spending rule	
Points for purchasing specific product	Customers earn 500 points after purchasing product Pmstk000 (SKU)	ACTIVE	2018-04-25 12:02	2018-06-25 12:02	Product purchase	
Points for buying specific product	Customers earn 120 points after purchasing product Pmo000m (SKU)	ACTIVE			Is all time active	Product purchase
Points for first purchase	Customers earn 50 points after first purchase registered in loyalty program	ACTIVE			Is all time active	Event rule
Points after check-in	Customers earn 5 points after logging in to the loyalty program client cockpit	ACTIVE			Is all time active	Event rule
Multipled points for purchasing specific product	Customers earn 2x points after purchasing product mjo003x (SKU)	ACTIVE			Is all time active	Multiply earned points

Showing 1 up to 8 from 8 entries.

Earning Points Rules

To display the Earning Points Rules menu:

On the Admin sidebar, tap **Earning points rules**, then choose **All earning points rules**.

Menu options



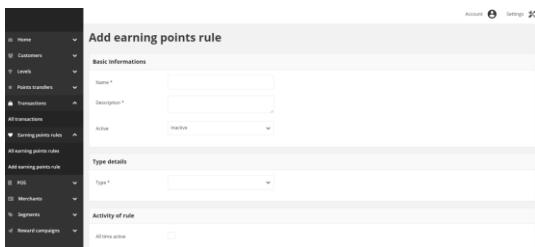
The screenshot shows the 'All earning points rules' section of the Admin sidebar. It displays a list of rules with columns for Name, Description, Active, Start at, End at, Type, and Actions.

Name	Description	Active	Start at	End at	Type	Actions
Points after registration	Customers earn 100 points after registration to loyalty program	ACTIVE			Is all time active	Event rule
1 EUR = 1 point	Customers earn 1 point after spending 1 EUR for purchases registered in loyalty program	ACTIVE			Is all time active	General spending rule
Additional points for shopping on Black Friday	Customers earn 1 additional point after spending 1 EUR for purchases registered in loyalty program during Black Friday	ACTIVE	2016-12-02 01:00	2016-12-02 23:00	General spending rule	
Points for purchasing specific product	Customers earn 500 points after purchasing product Pmstk000 (SKU)	ACTIVE	2018-04-25 12:02	2018-06-25 12:02	Product purchase	
Points for buying specific product	Customers earn 120 points after purchasing product Pmo000m (SKU)	ACTIVE			Is all time active	Product purchase
Points for first purchase	Customers earn 50 points after first purchase registered in loyalty program	ACTIVE			Is all time active	Event rule
Points after check-in	Customers earn 5 points after logging in to the loyalty program client cockpit	ACTIVE			Is all time active	Event rule
Multipled points for purchasing specific product	Customers earn 2x points after purchasing product mjo003x (SKU)	ACTIVE			Is all time active	Multiply earned points

Showing 1 up to 8 from 8 entries.

All earning points rules

Lists all Earning Points Rules within your loyalty program with additional information regarding its activity, conditions and general information.



Add earning points rules

Lists all data that need to be filled out to add new earning points rule

All earning points rules

The All earning points rules grid provide information about type and activity of all Earning Points Rules within Loyalty Program. Moreover, list contains brief description about each one and allows to preview and modify rule detail.

Name	Description	Active	Start at	End at	Type	Actions
Points after registration	Customers earn 100 points after registration to loyalty program	ACTIVE	Is all time active	Is all time active	Event rule	
1 EUR = 1 point	Customers earn 1 point after spending 1 EUR for purchases registered in loyalty program	ACTIVE	Is all time active	Is all time active	General spending rule	
Additional points for shopping on Black Friday	Customers earn 1 additional point after spending 1 EUR for purchases registered in loyalty program during Black Friday	ACTIVE	2016-12-02 01:00	2016-12-02 23:00	General spending rule	
Points for purchasing specific product	Customers earn 500 points after purchasing product Pmsk000 (SKU)	ACTIVE	2018-04-25 12:02	2018-06-25 12:02	Product purchase	
Points for buying specific product	Customers earn 120 points after purchasing product Pmo000m (SKU)	ACTIVE	Is all time active	Is all time active	Product purchase	
Points for first purchase	Customers earn 50 points after first purchase registered in loyalty program	ACTIVE	Is all time active	Is all time active	Event rule	
Points after check-in	Customers earn 5 points after logging in to the loyalty program client cockpit	ACTIVE	Is all time active	Is all time active	Event rule	
Multipplied points for purchasing specific product	Customers earn 2x points after purchasing product msj003xl (SKU)	ACTIVE	Is all time active	Is all time active	Multiply earned points	

Earning Points Rules List

Use the standard controls to sort the list by Purchase date and apply action (preview and modify) to selected rule records. Pagination controls appear if there are more rule records than fit on the page, and are used to move from one page to the next.

Field description

FIELD	DESCRIPTION
Name	Name of the rule displayed in views
Description	Brief description of rule
Active	Rule current status. Option include: Active/Inactive. Only Active rules are using for calculating earned points
Start at	Start date from which rule is active and can be used to calculate points
End at	End date until rule is active. After that date rule become inactive and can't be used to calculate points.
Type	Rule type. Option include: <ul style="list-style-type: none"> • Custom event rule • Customer referral • Event rule • General spending rule • Multiple earned points • Product purchase To learn more about the rule types, please see Rule Types
Actions	The operations that can be applied to selected rule. Options include: <ul style="list-style-type: none"> • Edit rule data • View rule details information

CHAPTER 12:

CREATING EARNING POINTS RULE

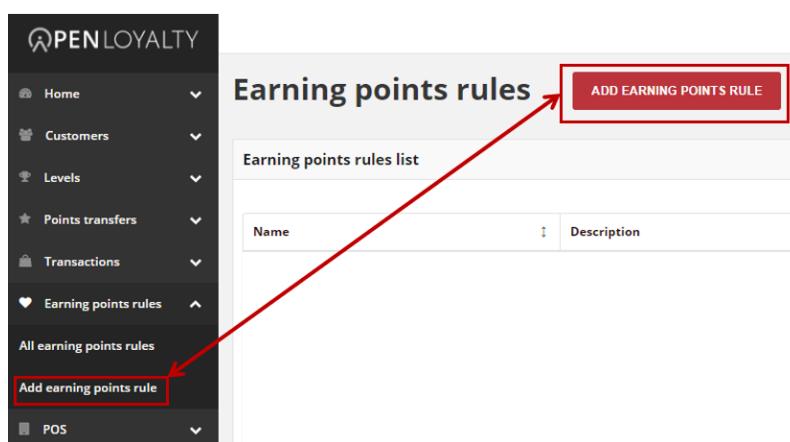
You can create unlimited amount customizable ways for customers to earn points within Loyalty Program based on various conditions.

The screenshot shows the 'Add earning points rule' form. On the left is a dark sidebar with navigation links like Home, Customers, Levels, Points transfers, Transactions, Earning points rules (which is expanded), and Reward campaigns. The main area has tabs for 'Basic Informations', 'Type details', and 'Activity of rule'. Under 'Basic Informations', there are fields for Name*, Description*, and Active (set to Inactive). Under 'Type details', there are fields for Type* (Product purchase), SKU*, and Points*. Under 'Activity of rule', there are fields for All time active (unchecked), Start at* (YYYY-MM-DD HH:mm), and End at* (YYYY-MM-DD HH:mm).

Add Earning Points Rule

To add new Earning Points Rule:

1. On the Admin sidebar, tap **Earning points rules**. Then, choose **Add earning points rule**. You can also add level directly from **All earning points rules** list by clicking **Add earning points rules** at the top of the page



Add Rule Options

Add earning points rule

Basic Informations	
Name *	<input type="text"/>
Description *	<input type="text"/>
Active	<input type="button" value="Inactive"/>
Type details	
Type *	<input type="button"/>
Activity of rule	
All time active	<input type="checkbox"/>
Start at *	<input type="text"/>
End at *	<input type="text"/>
Target	
Target type	<input type="button" value="Level"/>

Add Earning Points Rule Form

2. In **Basic informations** section, do the following:
 - a. Enter **Name** of the rule that will be displayed in views
 - b. Provide a brief **Description** of rule that explains how to award points
 - c. To activate the rule, in **Active** field select “**Active**” from the dropdown list
3. In **Type details** section set rule type. Note, that once selected type can not be changed. See **Rule types** to learn more about Earning points rules types.
4. In **Activity of rule** section specify time boundaries when rule will be active
 - If you want the rule to be active all the time mark **All time active** checkbox
 - If you want the rule to be limited in time in **Start at** and **End at** fields specify dates between rule will be active
5. In **Target** section specify group of customers for which rule will be used. For example, Gold members will get 2 times more points than Bronze
 - a. In **Target type** choose from dropdown list Level or Segment to specify whether the rule will be active for customers assigned to particular level or segment.
 - b. Depending on the **Target type** field **Segments** to specify segments or **Levels** to specify levels appear. You can choose one or more levels/segments to used.

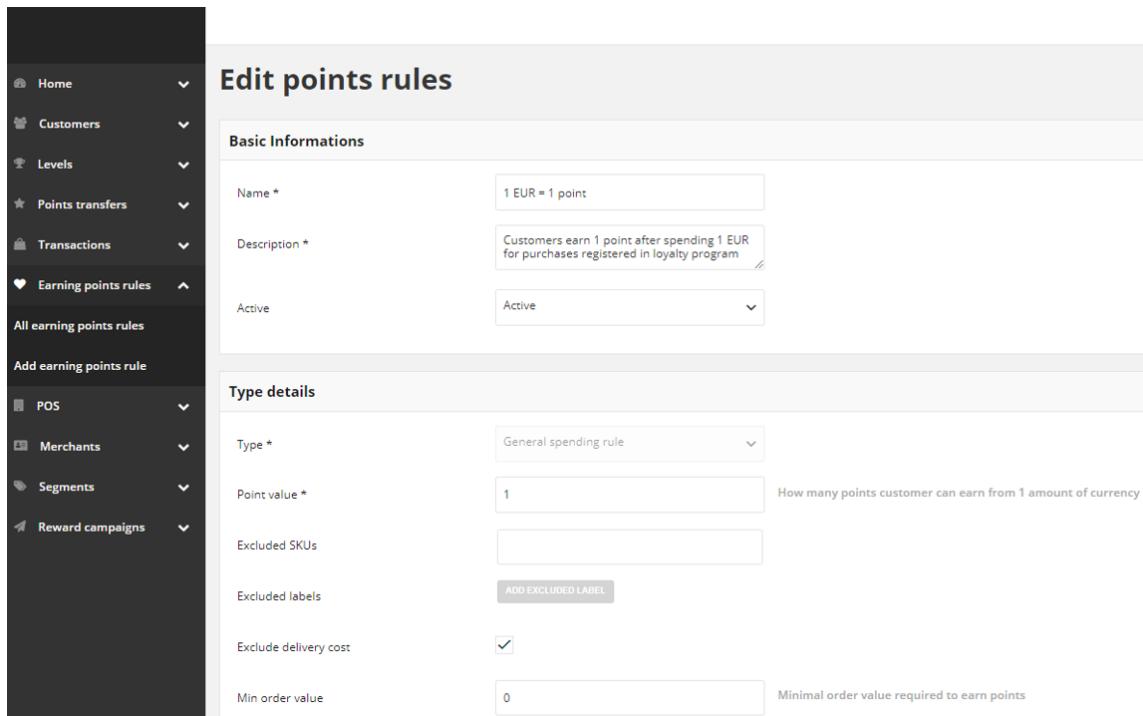
6. If applicable, in **Earning rule photo** section upload image for Earning points rule

7. When complete, tap **Save**

Image size is limited to 2MB. Image dimensions could not be smaller than 600 x 600 px. Allowed file formats: png, gif, jpg.

Updating Earning points rules

You can edit information regarding earning points rule used within your Loyalty Program, including all their data provided during rule creation process, except the rule type.



The screenshot shows the 'Edit points rules' page. On the left, there's a dark sidebar with navigation items like Home, Customers, Levels, Points transfers, Transactions, and Earning points rules. Under Earning points rules, it says 'All earning points rules' and 'Add earning points rule'. The main area has two tabs: 'Basic Informations' and 'Type details'. In 'Basic Informations', there are fields for Name (1 EUR = 1 point), Description (Customers earn 1 point after spending 1 EUR for purchases registered in loyalty program), and Active status (set to Active). In 'Type details', there are fields for Type (General spending rule), Point value (1), Excluded SKUs, Excluded labels (with a 'ADD EXCLUDED LABEL' button), Exclude delivery cost (checked), and Min order value (0). A note next to Point value says 'How many points customer can earn from 1 amount of currency'.

Earning Points Rule editing

To edit an Earning Points Rule:

1. On the Admin sidebar, tap **Earning points rules**. Then, choose **All earning points rules**.
2. In the Earning Points Rules list, find the rule to be edited and click **Edit** (edit icon) in the Action column to open the rule in edit mode.
3. Make any necessary changes to the rule.
4. When complete, tap **Save**

Activate/deactivate earning points rule

Any rule from the list can be activated and deactivated by Admin user.

To activate/deactivate level:

1. On the Admin sidebar, tap **Earning Points Rules**. Then, choose **All earning points rules**. You can also deactivate/activate the rule from **Edit mode**
2. In the Earning points rule list, find the rule to be deactivated and click **Active** in the **Active** column. The button in the column change to **Inactive** and appear as a grey-out.

Active
INACTIVE
ACTIVE
ACTIVE
ACTIVE

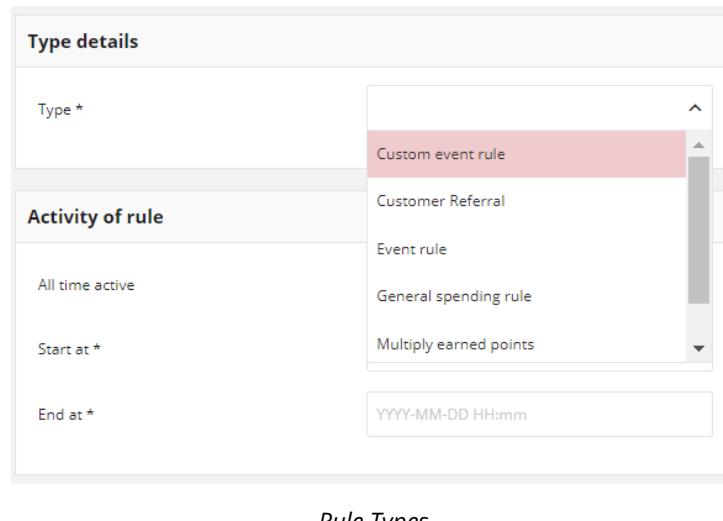
Active Column

When you deactivate rule, customers' will not earn points based on this rule terms.

3. To activate the rule click **Inactive** in the **Active** column. The button in the column change to **Active** and appears as a red.

EARNING POINTS RULES TYPES

During creation of rule you must specify its type, describing conditions for awarding points. Every rule type has its own required fields (conditions) that must be filled.



Rule Types

Open Loyalty offer following standard types:

- a. **Custom event rule** – Customer could receive points for external actions
- b. **Customer referral** – Referred and/or Referrer customer receive points for his action
- c. **Event rule** - Customer could receive points for specified actions
- d. **General spending rule** - Customer could receive points for order value
- e. **Multiple earned points** - Customer could receive multiple points for product with specified SKU
- f. **Product purchase** - Customer could receive given amount of points for specified product
- g. **Multiply earned points by product labels** – Customer could receive multiple points for product with specified labels

Custom event rule

Reward customer with defined amount of points for his action in external system. For example, share account with Facebook, add review for a product etc. If needed, you can also add repeatability limit to this rule type.

This Earning Point rule could be call only with API. Every run of API function will reward Customer with defined points.

Type details

Type *	Custom event rule
Custom Event name*	
Points *	
Usage limit active	<input checked="" type="checkbox"/>
Period	
Limit	

Custom Event Rule

Field description

FIELD	DESCRIPTION
Custom Event name	Name of the rule (to be used with calling API function)
Points	Number of points that will be added after earning rule has been called
Usage limit active	Option to limit how many times customer could be rewarded for the same action with the specified period of time. Option include: <ul style="list-style-type: none">• Yes – mark checkbox to limit repeatability• No – leave checkbox blank to reward customer for this rule without limits
Period	Visible and required if Usage limit active is marked. It defines period of time within customer can be rewarded for this rule. Option include: <ul style="list-style-type: none">• 1 day• 1 week• 1 month
Limit	Visible and required if Usage limit active is marked. how many times customer could be rewarded for this rule in specified period of time.

If customer used the limit then rule will not be shown on available rules list in Customer cockpit

Customer Referral

Referral (refer a friend, member get member) functionality allow to reward Customers for invitation other Customers to Loyalty program. It allow to give prize either referrer (Customer who send invitation) and referred person (Customer who respond with action to invitation).

Functionality allow to reward for actions:

- Referred Customer register new account in OL
- Referred Customer make first purchase in OL (first transaction)
- Referred Customer make purchase in OL (every transaction)

The screenshot shows a configuration form titled 'Type details'. It contains four fields: 'Type *' with a dropdown menu showing 'Customer Referral', 'Event name*' with a dropdown menu, 'Reward*' with a dropdown menu, and 'Points *' with a dropdown menu. The entire form is enclosed in a light gray border.

Customer Referral Rule

Field description

FIELD	DESCRIPTION
Event name	Select an event for which the customer will receive points. Options include: <ul style="list-style-type: none">• Every purchase• First purchase• Register
Reward	Select who should receive points for this action. Option include: <ul style="list-style-type: none">• Referred• Referrer• Both
Points	Amount of points that will be earned for this event rule

Event rule

Reward customer with defined amount of points for his action. Actions for which customer can get points are predefined in the Open Loyalty and related to events of your loyalty program. For example, create an account, first purchase etc.

The screenshot shows a user interface for creating a new event rule. At the top, there's a header labeled "Type details". Below it, there are three input fields: "Type *", "Event name*", and "Points *". The "Type *" field has a dropdown menu open, showing "Event rule" as the selected option. The "Event name*" and "Points *" fields are also dropdown menus. The entire form is contained within a light gray box.

Event Rule

Field description

FIELD	DESCRIPTION
Event name	Select an event for which the customer will receive points. Options include: <ul style="list-style-type: none">• Account created• Customer logged in• First purchase• Newsletter subscription
Points	Amount of points that will be earned for this event rule

General spending rule

Reward customer with defined amount of points for his order value. Allows to specify how many points customer can earn from 1 amount of currency. If needed, you can exclude certain products (with define SKUs or labels) and delivery costs from the points calculation.

Type details

Type *	<input type="text" value="General spending rule"/>				
Point value *	<input type="text"/> How many points customer can earn from 1 amount of currency				
Excluded SKUs	<input type="text"/>				
Excluded labels	<table border="1"><tr><td>Key *</td><td><input type="text"/></td></tr><tr><td>Value *</td><td><input type="text"/></td></tr></table>	Key *	<input type="text"/>	Value *	<input type="text"/>
Key *	<input type="text"/>				
Value *	<input type="text"/>				
ADD EXCLUDED LABEL					
Exclude delivery cost	<input type="checkbox"/>				
Min order value	<input type="text"/> Minimal order value required to earn points				

General Spending Rule

Field description

FIELD	DESCRIPTION
Point value	Ratio for calculating earned points based on purchased value. For example, if ratio is 2 then user get 2 points for every 1\$ spent.
Excluded SKUs	Product with selected SKUS will not be included in order value used for earned points calculation.
Excluded labels	Points will not be calculated for the purchase of products with defined labels. Pair of Key and Value
Excluded delivery cost	When selected then delivery cost will not be included in order value used for earned points calculation .
Min order value	Minimal order value required to earn points. Points will not be calculated for whole purchase if its value will be below provided value

Multiply earned points

Multiple points that customer receive for purchase products with specified SKU. The rule is related to Product purchase rule. The rule defines for which purchase products, points (defined in Product purchase rule) are to be multiplied.

Type details

Type *	Multiply earned points
SKU *	
Multiplier *	

Multiply earned points

Field description

FIELD	DESCRIPTION
SKU	Rule will be applied only for listed products with selected SKUs
Multiplier	Points gained for purchase product will be multiplied by this factor

Product purchase

Reward customer with defined amount of points for purchase specified products. Rule can be related to Multiply earned points rule.

Type details	
Type *	Product purchase
SKU *	
Points *	

Product Purchase

Field description

FIELD	DESCRIPTION
SKU	Rule will be applied only for listed products with selected SKUs
Points	Predefined amount of points will be earned instead of calculation based on product value

Multiply earned points by product labels

Multiple points that customer receive for purchase products with specified labels. The rule is related to Product purchase, Multiply earned points and General spending rule. The rule defines for which purchase products, points (defined in rules above) are to be multiplied.

The sequence of points calculation is as following:

- Firstly, if applicable, customer receives points from general spending rule
- Secondly, if applicable, points are multiply based on multiply earned points rule
- In next step, points are multiply based on labels multipliers from discussed rule.
- Finally, if applicable, customer receives points from product purchase rule

Rule can contains more than one product label. Different **Labels** are linked with OR condition - at least one of labels linked with this rule must be true to let customer earn points. If more than one is true, points are multiply in order by all multipliers.

For example, if you have 2 labels assigned to this rule which are true, points gathered from purchases are multiply firstly by multiplier assigned to 1st label, and then again multiply by multiplier assigned to 2nd label.

The screenshot shows a configuration interface for a rule type. At the top, under 'Type details', the 'Type *' dropdown is set to 'Multiply earned points by product labels'. Below this, under 'Label multipliers', there are three input fields: 'Key *' (a text input field), 'Value *' (a text input field), and 'Multiplier *' (a text input field). A button labeled 'ADD LABEL MULTIPLIER' is located below these fields. The entire configuration is titled 'Multiply earned points by product labels'.

Field description

FIELD	DESCRIPTION
Key	Product label name e.g. size, color

Value	Value of product label with specified in previous step Key, e.g. M, red
Multiplier	Points gained for purchases product with label key and value from above will be multiplied by this factor
Add label multiplier	Button allowing to add next product label that will be assigned to rule

POS

In this section of the guide, you'll learn how to set up a stores – online and offline, and manage their data

POS MENU

All POS

POS localization details

ADDING NEW POS

Updating POS information

CHAPTER 14:

POS MENU

Customers can make transactions not only in the online store but also in offline stores. Both transactions should be count within your Loyalty Program. POS menu allows you to define all stores, that transaction should be included within your Loyalty Program.

You can simply track all stores and theirs transactions details – value and number.

Name	Description	Identifier	Localization	Transactions value	Transactions count	Actions
eCommerce 1	Sample POS	us_online_1	City	144.17EUR	2	<input type="checkbox"/>
Off-line store 2	Sample POS	france_1	City	0EUR	0	<input type="checkbox"/>
Offline store 1	Sample POS	pos1	City	434854EUR	294	<input type="checkbox"/>
eCommerce 2	Sample on-line POS	ecommerce2	City	451425EUR	292	<input type="checkbox"/>

POS

To display the POS menu:

On the Admin sidebar, tap **POS**, then choose **All POS**.

Menu options

All POS

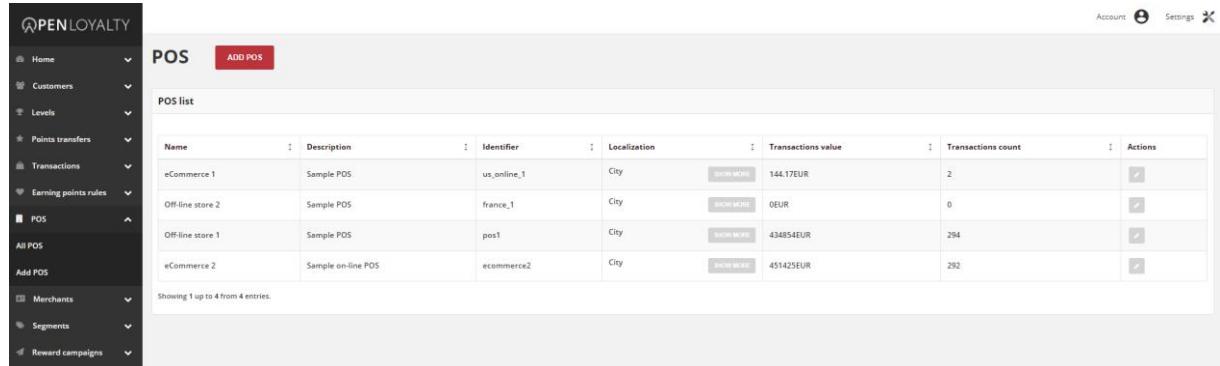
Lists all POS within your loyalty program with additional information regarding its localization and transactions.

Add POS

Lists all data that need to be filled out to add new POS

All POS

The All POS grid provide information about all stores, which transactions made by customers will be registered and count within Loyalty Program. Moreover, list contains address details and brief description about each one and allows modify POS detail.



The screenshot shows the OPEN LOYALTY software interface. On the left, there is a sidebar with a tree menu containing categories like Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Add POS, Merchants, Segments, and Reward campaigns. The 'POS' category is expanded, showing 'All POS' and 'Add POS'. The main area has a header 'POS' and 'ADD POS'. Below the header is a table titled 'POS list' with columns: Name, Description, Identifier, Localization, Transactions value, Transactions count, and Actions. There are four entries in the table:

Name	Description	Identifier	Localization	Transactions value	Transactions count	Actions
eCommerce 1	Sample POS	us_online_1	City	144.17EUR	2	<input checked="" type="checkbox"/>
Off-line store 2	Sample POS	france_1	City	0EUR	0	<input checked="" type="checkbox"/>
Off-line store 1	Sample POS	pos1	City	434854EUR	294	<input checked="" type="checkbox"/>
eCommerce 2	Sample on-line POS	ecommerce2	City	451425EUR	292	<input checked="" type="checkbox"/>

At the bottom of the table, it says 'Showing 1 up to 4 from 4 entries.'

POS

Use the standard controls to sort the list and apply action (modify) to selected POS records. Pagination controls appear if there are more rule records than fit on the page, and are used to move from one page to the next.

Field description

FIELD	DESCRIPTION
Name	Name of the store
Description	Brief description of the store
Identifier	Unique name used for internal identification
Localization	Address details of the store. Only city is visible. More information is available after clicking Show more .
Transactions value	Sum of all transactions values that were processed in POS
Transactions count	How many transactions were processed in POS
Actions	Open POS record in edit mode

POS localization details

You can simply view not only the transaction summary and city where store is located but also the address details.

To display the address details:

1. On the Admin sidebar, tap **POS**. Then, choose **All POS**.
2. In the POS list, find the store you want to see address details and click **Show more** in the **Localization** column. After clicking, the popup with detailed address will be shown.

The screenshot shows the Open Loyalty Admin interface. On the left, the sidebar includes sections like Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS (selected), All POS, Add POS, Merchants, Segments, and Reward campaigns. The main area is titled 'POS' with a 'POS list' sub-section. It displays four entries: 'eCommerce 1' (Description: Sample POS), 'Off-line store 2' (Description: Sample POS), 'Off-line store 1' (Description: Sample POS), and 'eCommerce 2' (Description: Sample on-line POS). A modal window titled 'Localization' is open over the list, showing detailed address information for 'eCommerce 2'. The modal fields include: City (Washington), State/Province (Washington), Street name (21), Building name (12345), Postal code (144 17EUR), Country (US), Latitude (51.1170364), and Longitude (17.0203999). Below the modal, a table provides transaction summaries for each store: 'eCommerce2' has 2 transactions worth 144.17EUR; 'Offline' has 0 transactions worth 0EUR; 'Off-line store 1' has 294 transactions worth 434854EUR; and 'eCommerce 2' has 292 transactions worth 451425EUR.

Transactions value	Transactions count	Actions
144.17EUR	2	[Edit]
0EUR	0	[Edit]
434854EUR	294	[Edit]
451425EUR	292	[Edit]

Localization Details Popup

CHAPTER 15:

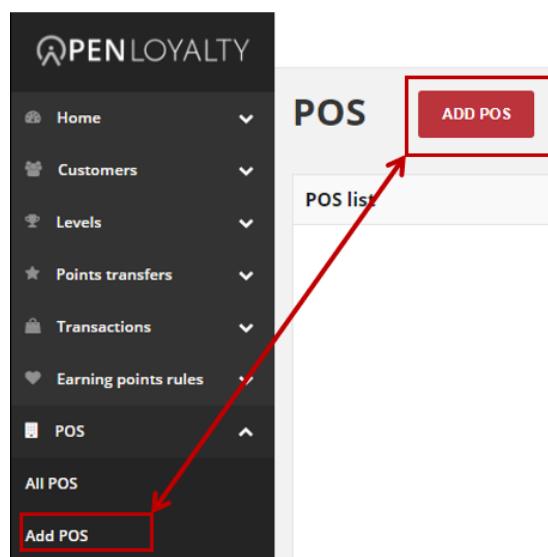
ADDING NEW POS

You can add unlimited amount of stores where processed transaction within Loyalty Program will be recorded and count.

Add POS

To add new POS:

1. On the Admin sidebar, tap **POS**. Then, choose **Add POS**. You can also add store directly from **All POS** list by clicking **Add POS** at the top of the page.



Add POS Options

2. In the **Basic informations** section, do the following:

Add POS

Basic Informations	
Name *	<input type="text"/>
Description	<input type="text"/>
Identifier *	<input type="text"/>

Add POS Basic Information Section

- a. Enter **Name** of the store that will be displayed in views
- b. If needed, provide a brief **Description** of store that help identifications
- c. To better identification, in **Identifier** field select enter unique store name

3. In **Localization** section, provide the following required store address detail information:

- Street name
- Building name
- Postal code
- City
- State/Province
- Country

4. In the same **Localization** section, complete the optional fields as needed:

- Flat/Unit name
- Latitude
- Longitude

5. When complete, tap **Save**

Updating POS information

You can edit information regarding POS used within your Loyalty Program, including all their data provided during POS creation process.

The screenshot shows the 'Edit POS' page in the Open Loyalty Admin interface. The sidebar on the left is titled 'OPEN LOYALTY' and includes sections for Home, Customers, Levels, Points transfers, Transactions, Earning points rules, and POS. Under POS, there are 'All POS' and 'Add POS' options, with 'Merchants', 'Segments', and 'Reward campaigns' listed under 'Add POS'. The main content area is titled 'Edit POS' and contains two sections: 'Basic Informations' and 'Localization'. In 'Basic Informations', there are fields for 'Name' (eCommerce 1), 'Description' (Sample POS), and 'Identifier' (us_online_1). In 'Localization', there are fields for 'Street name' (Street), 'Building name' (21), 'Flat/Unit name' (empty), 'Postal code' (12345), and 'City' (Civ). At the top right of the page are 'Account' and 'Settings' links.

POS Editing

To edit a POS:

1. On the Admin sidebar, tap **POS**. Then, choose **All POS**.
2. In the POS list,, find the store to be edited and click **Edit** () icon in the Action column to open the store in edit mode.
3. Make any necessary changes to the store.
4. When complete, tap **Save**

MERCHANTS

This section of the guide provides an overview of the all merchants working in yours stores and involve with Loyalty Program. You'll learn how to add and manage merchant data, including assigning to particular store.

MERCHANTS MENU

All Merchants

CREATING MERCHANT ACCOUNT

- Updating Merchant account
- Activate/deactivate merchant account
- Remove merchant account

POS COCKPIT

POS Cockpit Sign In

Merchant Account

CHAPTER 16:

MERCHANTS MENU

The Merchant is linked to a store. In Open Loyalty store is called point-of-sale (POS). Merchants menu provide an overview of all merchants and it's assigned to particular POS. You can simply see number of merchants works in particular store. Moreover, you can assigned merchant to customer, who is operated by a given merchant.

First name	Last name	Phone	E-mail	POS ID	POS name	POS city	Active	Actions
John	Doe	+8203707599395	merchant@openloyalty.io	00000000-0000-474c-1111-b0dd880c87c2	Off-line store 2	City	ACTIVE	

Merchants

To display the Merchant menu:

On the Admin sidebar, tap **Merchant**, then choose **All merchants**.

Menu options

All merchants

Lists all Merchant within your loyalty program with additional information regarding his data and assigned POS localization.

Add merchants

Lists all data that need to be filled out to add new Merchant

All Merchants

The All merchants grid provide information about all merchants and its assigned to a POS, which transactions made by customers will be registered and count within Loyalty Program. Moreover, list contains POS address details and additional information about each one and allows modify merchant data.

All Merchants

Use the standard controls to sort the list, filter and search merchant by typing in the field under column header value you want to find, and apply actions to selected merchants (modify or remove). Pagination controls appear if there are more merchants records than fit on the page, and are used to move from one page to the next.

Field description

FIELD	DESCRIPTION
First name	The first name of the merchant
Last name	The last name of the merchant
Phone	The merchant phone number. Can be used as a search/filter option.
Email	The merchant email address. Can be used as a login to POS Cockpit or search/filter option.
POS name	Name of the store
POS city	City where store is located
Active	Merchant account current status. Option include: Active/Inactive. Only Active merchants account are using for login to POS Cockpit.
Actions	The operations that can be applied to selected merchant account. Options include: <ul style="list-style-type: none">• Edit merchant data• Remove merchant account

CHAPTER 17:

CREATING MERCHANT ACCOUNT

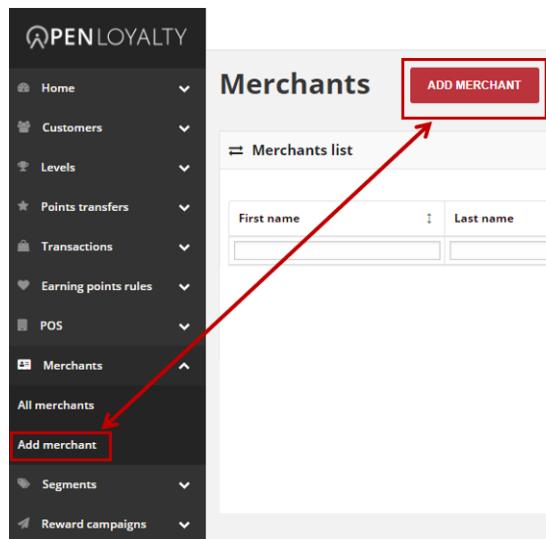
You can create from Admin unlimited amount of merchants account and assigned them with particular store (POS). Merchant account is needed to log in to POS Cockpit.

The screenshot shows the 'Add merchant' form. On the left is a sidebar with navigation links: Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS (with sub-links like POS+, Merchants, All merchants, Add merchant), Segments, and Reward campaigns. The main area is titled 'Add merchant' and contains a 'Merchant details' section with fields for First name*, Last name*, Active (set to 'Inactive'), E-mail*, Phone, Password*, and POS*. At the bottom are 'SAVE' and 'CANCEL' buttons.

Add Merchant Account

To add new merchant account:

1. On the Admin sidebar, tap **MERCHANTS**. Then, choose **Add merchant**. You can also add merchant directly from **All merchants** list by clicking **ADD MERCHANT** at the top of the page.



Add Merchant Options

2. In the **Merchant details** section, do the following:

The screenshot shows a web-based form titled "Add merchant". Below it is a section titled "Merchant details". Inside this section are several input fields: "First name *", "Last name *", "Active" (a dropdown menu with "Inactive" selected), "E-mail *", "Phone", "Password *", and "POS *". To the right of the "Password" field is a note "Enter password". At the bottom of the form are two buttons: a red "SAVE" button and a grey "CANCEL" button.

Add Merchant Form

- a. Enter merchant **First name** and **Last name**
 - b. To activate the merchant account, in **Active** field select "**Active**" from the dropdown list
 - c. Enter merchant **E-mail** address, which will be used as a login credential to merchant account in POS Cockpit.
 - d. Provide merchant **Phone** number
 - e. Enter **Password** to merchant account, which will be used as a login credential to account in POS Cockpit. **Merchant receive password to his account via email message.**
 - f. Assigned **POS** to merchant by selecting from the dropdown list POS name
3. When complete, tap **Save**

Your password must be eight or more characters long, and contains at least one upper case letters, one numeric character and one special character

Updating Merchant account

You can edit information about your merchants, including all their data provided during account creation process and password.

The screenshot shows the 'Edit merchant' form in the OpenLoyalty Admin interface. The sidebar on the left has a dark background with white text and icons. The 'Merchants' option is expanded, showing 'All merchants' and 'Add merchant'. The main form has a light gray header 'Edit merchant' and a section titled 'Merchant details'. It includes fields for First name (with a required asterisk), Last name, Active status (with a dropdown menu), E-mail, Phone, Password (with a note '***** (Change password)'), and POS (with a dropdown menu). At the bottom are 'SAVE' and 'CANCEL' buttons.

Merchant Account Editing

To edit a merchant account:

1. On the Admin sidebar, tap **Merchants**. Then, choose **All merchants**.
2. In the Merchants list, find the record to be edited and click **Edit** (edit icon) in the Action column to open the merchant in edit mode.
3. Make any necessary changes to the store.
4. When complete, tap **Save**.

To change a password to merchant account:

1. On the Admin sidebar, tap **Merchants**. Then, choose **All merchants**.
2. In the Merchants list, find the record to be edited and click **Edit** (edit icon) in the Action column to open the merchant in edit mode.
3. In **Password** field click **Change password** link. After clicking the field will be blank.

4. Provide a new password in blank **Password** field
5. When complete, tap **Save**

Activate/deactivate merchant account

Any merchant account from the list can be activated and deactivated by Admin user.

To activate/deactivate level:

1. On the Admin sidebar, tap **MERCHANTS**. Then, choose **All merchants**. You can also deactivate/activate merchant account from **Edit mode**.
2. In the Merchants list, find the merchants to be deactivated and click **Active** in the **Active** column. The button in the column change to **Inactive** and appear as a grey-out.

Active
INACTIVE
ACTIVE
ACTIVE
ACTIVE

Active Column

When you deactivate account, merchant will not be able to login to his account in POS Cockpit.

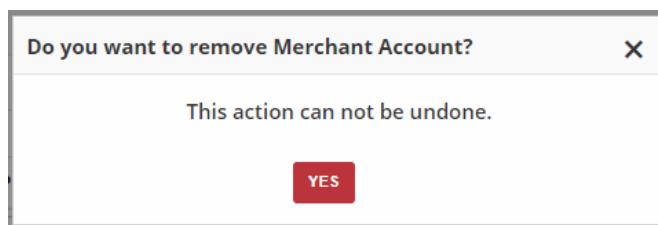
4. To activate the merchant account click **Inactive** in the **Active** column. The button in the column change to **Active** and appears as a red.

Remove merchant account

You can also delete merchant account from the Admin.

To delete a merchant account:

1. On the Admin sidebar, tap **MERCHANTS**. Then, choose **All merchants**.
2. In the Merchants list, find the record to be edited and click **Remove** () icon in the Action column to delete the merchant account.
3. System display a message asked you to confirm the action. To confirm tap  **Yes**

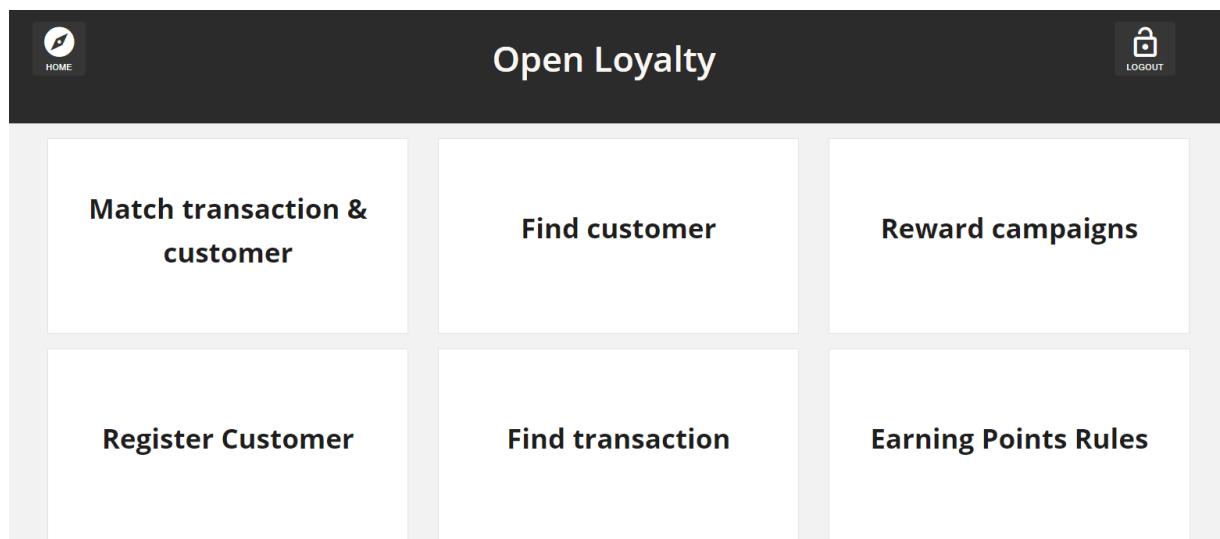


Removing Merchant Action

CHAPTER 18:

POS COCKPIT

MERCHANTS ARE LINKED WITH A STORE AND POINT OF SALE (POS) DEVICE. PoS DEVICE PLAY AN IMPORTANT ROLE IN IMPLEMENTATION OF THE LOYALTY PROGRAM. THE SALE CAN BE DONE BY WEBSHOP OR STATIONARY BY RETAILERS TO CUSTOMERS – BUT IN THAT CASE ONLY THROUGH PoS DEVICES. THIS CHAPTER GIVES AN OVERVIEW OF THE USE OF PoS COCKPIT.



POS Cockpit Home Page

POS COCKPIT SIGN IN

MERCHANTS HAVE EASY ACCESS TO THEIR ACCOUNT FROM THEIR POS. MERCHANTS CAN BE REDIRECTED TO POS COCKPIT AS LOYALTY MODULE WITHIN YOUR POS.

A screenshot of a sign-in form titled "Login to your account". It has two input fields: one for email with "merchant@openloyalty.io" and one for password with ".....". There is a "Keep me logged in" checkbox and a red "SIGN IN" button. Below the button is a link "Forgot password?".

Sign In to POS Merchant Account

When merchants forgot their passwords, a reset link is sent to the email address that is associated with the account.

To sign in to your merchant account:

1. Click a link on the POS to open Login page
2. When prompted, enter the **Email Address** that is associated with customer account, and **Password**. Then, tap **Sign In**

To reset your merchant account password:

1. On the Login page, tap **Forgot password?**
2. When prompted, enter the **Email Address** that is associated with your account, and tap **Recover Password**

If the email address you entered matches the one that is associated with the account, you will receive a "Password reset requested" email with a link to reset your password.

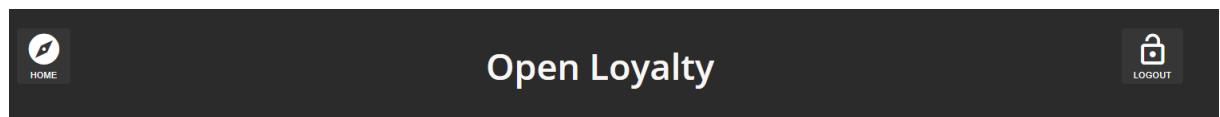
4. Click the **Reset Password link** in the email and enter your **New Password**. Enter it again to confirm.

Your password must be eight or more characters long, and contains at least one upper case letters, one numeric character and one special character

When you receive confirmation that the password is updated, you can use the new password to log in to your account.

To sign out of the merchant account:

In the upper-right corner, tap the **Logout** () icon.



Logout

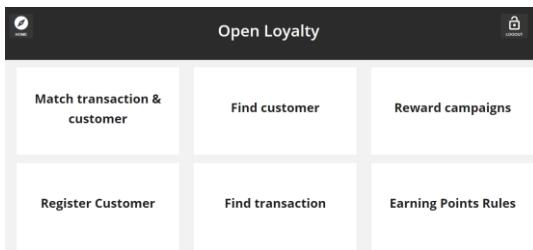
When merchant logout, the Sign-In page returns.

Merchant Account

Merchant through theirs account can view basic customer data and activity within Loyalty Program, and manage their own personal information.

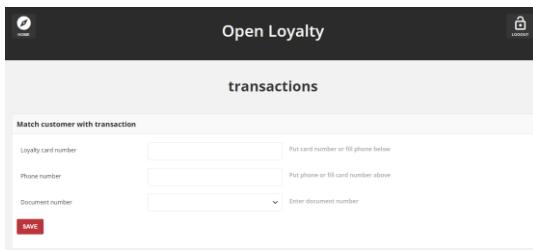
Your till is equipped with a touchscreen displaying the Open Loyalty POS Cockpit. Touch a control element (e.g. buttons, entry fields, etc.) displayed on the screen using your finger or a blunt object. The control element is activated and the function requested is executed.

The general elements described below provide you with transaction details, loyalty program operations and allow you to enter information or select functions displayed.



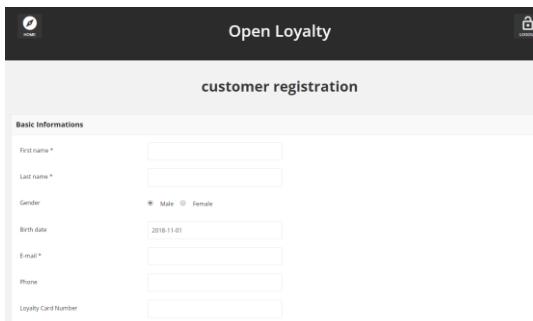
Home Page

The POS Cockpit Home page provides button links to main details of loyalty activities: transactions, customers, Earning Points Rules and Reward Campaigns.



Match transaction & customer

Allows to link transaction with Customer Account directly from the POS. Based on matching transaction with customer identification factors priority (set up in Configuration. To remain about identification factors please see **Configuration**. Useful when only transactions are sent to Open Loyalty



Register customer

Allows to register new customer directly from the POS. Useful when new customer want to register to Loyalty Program during his shopping in a store.

Find customer

Allows to find specify customer with a link to each to preview his profile details directly from the POS.

Find transaction

Allows to find specify transactions and preview its details directly from the POS with a link to each to see more information.

Reward campaign list							
Name	Active	Cost in points	Limit	Limit per customer	Levels	Segments	Actions
Gift for birthday anniversary	All time	5				Birthday anniversary	Edit
50 EUR coupon to use in off-line store	All time	50	5	1	Gold VIP Bronze Silver		Edit
Free delivery	All time	20	10	10	Gold VIP Bronze Silver		Edit
Discount code reward	All time	20	10	1	Gold VIP Bronze Silver		Edit

Reward campaigns

Lists all available rewards with details about target, limits, cost in points and status with a link to each to see more information.

Earning rules							
Name	Description	Active	Start at	End at	All time active	Type	Actions
Points after registration	Customers earn 100 points after registration to loyalty program	true			true	Event rule	Edit
1 EUR = 1 point	Customers earn 1 point after spending 1 EUR for purchases registered in loyalty program	true			true	General spending rule	Edit
Additional points for shopping on Black Friday	Customers earn 1 additional point after spending 1 EUR for purchases registered in loyalty program during Black Friday	true	2016-12-02 00:00	2016-12-02 23:00	false	General spending rule	Edit
Points for purchasing specific product	Customers earn 500 points after purchasing product Pm00000 (SKU)	true	2018-05-01 00:00	2018-05-01 00:16	false	Product purchase	Edit
Points for buying specific product	Customers earn 120 points after purchasing product Pm00001 (SKU)	true			true	Product purchase	Edit

Earning Points Rules

Lists all available rewards with description and details about type, time boundaries when rule is active and status with a link to each to see more information.

SEGMENTS

In this section of the guide you will become familiar with the customer segmentation feature, and learn to configure customer segments according to your preference. You will also learn how to create and assign customers to segments, that can be referenced in rewards, earning points rules, levels etc.

SEGMENTS MENU

All Segments

Customers assigned to segment list

Download the Customers list

CREATING CUSTOMER SEGMENT

Updating segments data

Activate/deactivate Segment

Remove Segment

SEGMENT PARTS TYPES

Anniversary

Average transaction value

Bought in specific POS

Bought products with labels

Bought specific brands

Bought specific SKU

Customers who has such labels

Customers who has such labels value

Last purchase was n days ago

Purchase period

Transaction count

Transaction percent in POS

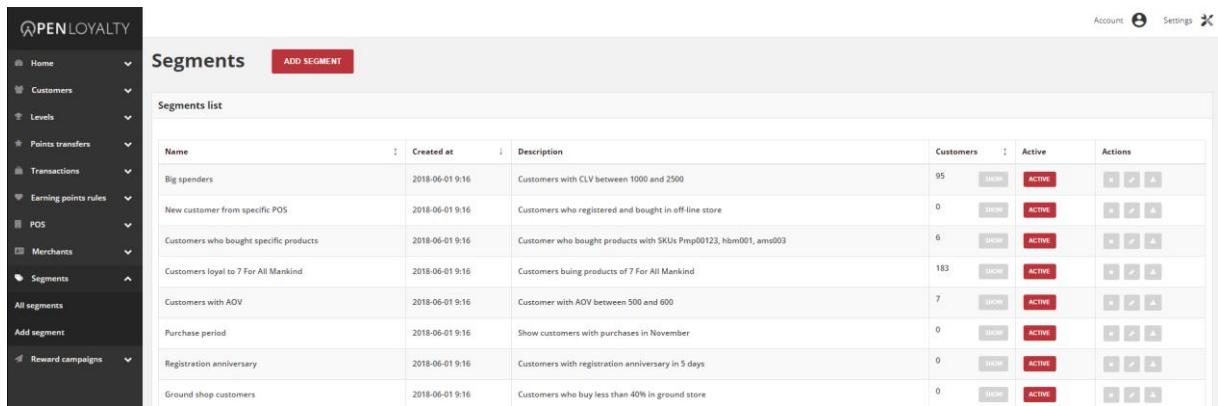
Transaction value

CHAPTER 19:

SEGMENTS MENU

Customer segments allow you to e.g. dynamically count points, levels and display rewards to specific customers, based on properties such as system events, transactions history, purchasing activity, and so on. Customer can be assigned to several segments.

You can optimize marketing initiatives based on targeted segments. You can also preview and export the list of targeted customers. Because customer segment information is constantly refreshed, customers can become associated and disassociated from a segment as they shop in your store.



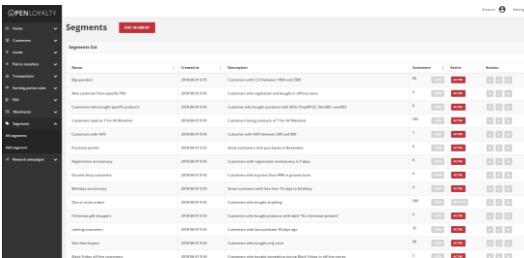
The screenshot shows the OPENLOYALTY Admin sidebar with the 'Segments' option selected. The main area is titled 'Segments' with a red 'ADD SEGMENT' button. Below it is a 'Segments list' table with columns: Name, Created at, Description, Customers, Active, and Actions. The table contains eight rows of segment data, each with a preview icon, edit icon, and delete icon in the Actions column.

Segments

To display the Segments menu:

On the Admin sidebar, tap **Segments**, then choose **All segments**.

Menu options



The screenshot shows the 'Segments' menu with the 'All segments' option selected. The main area displays a table titled 'Segments list' with columns: Name, Created at, Description, Customers, Active, and Actions. The table lists various segments like 'Big spenders', 'New customer from specific POS', etc., with their respective details and status.

All segments

Lists all customer segments within your loyalty program with brief description of each and additional information regarding assigned customers. There is also possibility to preview and export the list of targeted customers



The screenshot shows the 'Segments' menu with the 'Add segment' option selected. The main area is titled 'Add segment' with a 'Basic information' section containing fields for 'Name*', 'Description', and 'Type'. Below it is a 'Segment parts' section with a preview icon.

Add segment

Lists all data that need to be filled out to create new segment

All Segments

The All segments grid provide information about all segments within your Loyalty Program with information about assigned customers. Moreover, you can also export the list of targeted customers.

Name	Created at	Description	Customers	Active	Actions	
Big spenders	2018-06-01 9:16	Customers with CLV between 1000 and 2500	95	Show	ACTIVE	Edit Delete Export
New customer from specific POS	2018-06-01 9:16	Customers who registered and bought in off-line store	0	Show	ACTIVE	Edit Delete Export
Customers who bought specific products	2018-06-01 9:16	Customer who bought products with SKUs Pmp00123, hbm001, amst003	6	Show	ACTIVE	Edit Delete Export
Customers loyal to 7 For All Mankind	2018-06-01 9:16	Customers buying products of 7 For All Mankind	183	Show	ACTIVE	Edit Delete Export
Customers with AOV	2018-06-01 9:16	Customer with AOV between 500 and 600	7	Show	ACTIVE	Edit Delete Export
Purchase period	2018-06-01 9:16	Show customers with purchases in November	0	Show	ACTIVE	Edit Delete Export
Registration anniversary	2018-06-01 9:16	Customers with registration anniversary in 5 days	0	Show	ACTIVE	Edit Delete Export
Ground shop customers	2018-06-01 9:16	Customers who buy less than 40% in ground store	0	Show	ACTIVE	Edit Delete Export
Birthday anniversary	2018-06-01 9:16	Show customers with less than 10 days to birthday	4	Show	ACTIVE	Edit Delete Export
One or more orders	2018-06-01 9:16	Customers who bought anything	300	Show	INACTIVE	Edit Delete Export
Christmas gift shoppers	2018-06-01 9:16	Customers who bought products with label "for christmas-present"	0	Show	ACTIVE	Edit Delete Export
Leaving customers	2018-06-01 9:16	Customers with last purchase 10 days ago	32	Show	ACTIVE	Edit Delete Export
One time buyers	2018-06-01 9:16	Customers who bought only once	96	Show	ACTIVE	Edit Delete Export
Black Friday off-line customers	2018-06-01 9:16	Customers who bought something during Black Friday in off-line stores	2	Show	ACTIVE	Edit Delete Export

All Segments

Use the standard controls to sort the list and apply actions to selected segments (modify, remove, active/inactive, export customer list). Pagination controls appear if there are more segments records than fit on the page, and are used to move from one page to the next.

Field description

FIELD	DESCRIPTION
Name	Name of the segment
Created at	The date when segment was created
Description	Brief description of the segment
Customers	Show customers account number assigned to this segment. After Show click, list of these customer details will be shown.
Active	Segment current status. Option include: Active/Inactive. Customer could be assigned only to Active segment.
Actions	The operations that can be applied to selected segments. Options include: <ul style="list-style-type: none"> • Edit segment data • Delete segment • Download list of customers details assigned to this segment

Customers assigned to segment list

You can simply view not only the number but also the list of customers with details assigned to particular segment.

To display the list of customers:

1. On the Admin sidebar, tap **Segments**. Then, choose **All segments**.

2. In the Segments list, find the segment that you want to see customers list and click **Show** in the **Customers** column. After clicking, the list of customers will be opened, filtered according to the assigned segment.

The screenshot shows the OPEN LOYALTY Admin interface. On the left, there is a dark sidebar with various menu items like Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, All segments, Add segment, and Reward campaigns. Under Segments, 'All segments' is selected. The main area has a light gray background and displays a table titled 'Customers in segment Big spenders'. The table has columns for First name, Last name, Phone, E-mail, Gender, Birth date, Created at, and Actions. There are 20 entries listed, each with a small edit and delete icon next to it. At the bottom of the table, it says 'Showing 1 up to 20 from 95 entries.' and has a pagination control with numbers 1 through 5.

First name	Last name	Phone	E-mail	Gender	Birth date	Created at	Actions
Nicklaus	Abernathy	+092530762929	pearl.considine@example.org	female	1980-11-26	2018-05-03 12:28	
Madie	Goldner	+2659901000229	jannie.hodkiewicz@example.net	male	1989-07-27	2018-05-03 15:13	
Rhoda	Spencer	+5369553550444	vickie.goldner@example.net	male	1972-07-21	2018-05-22 22:18	
Amy	Bechtelar	+2686682883568	maximo.volman@example.org	male	1978-09-01	2018-05-06 08:17	
Idella	Hoeger	+1211488386801	hartmann.syndi@example.net	female	2006-10-22	2016-10-27 01:27	
Xavier	Emmerich	+6709351475771	dena.kreiger@example.com	female	1986-02-18	2016-10-23 04:52	
Aly	Abbott	+2120042125164	casey.hermann@example.com	female	1973-02-22	2016-11-26 11:13	
Gaston	Wilkinson	+1824513749908	deon16@example.org	female	1976-12-17	2016-10-15 03:36	
Damion	Farrell	+0839621517537	lucius87@example.org	male	1994-09-07	2016-10-24 14:45	
Audie	McKenzie	+4954997309764	julie91@example.com	female	1972-05-15	2016-11-28 05:26	
Caroline	Beahan	+5830353654473	stokes.madelyn@example.net	male	2001-03-27	2016-11-20 13:27	
Rollin	Kling	+3235156371808	thiel.carmine@example.com	male	1995-06-25	2016-12-01 21:00	
Jovany	Wuckert	+9487187972043	vicky.ledner@example.com	male	1974-12-16	2018-05-14 10:28	
Hal	McGlynn	+3644913425826	pjohnson@example.org	male	1976-08-12	2018-05-04 00:42	

List of Customers in Big Spenders Segment

Use the standard controls to sort the list, filter and search customer by typing in the field under column header value you want to find, and apply actions to selected customers (edit and view detail). Pagination controls appear if there are more customer records than fit on the page, and are used to move from one page to the next.

Download the Customers list

There is also possibility to download a list of customers to a CSV file.

To download the list of customers assigned to a segment:

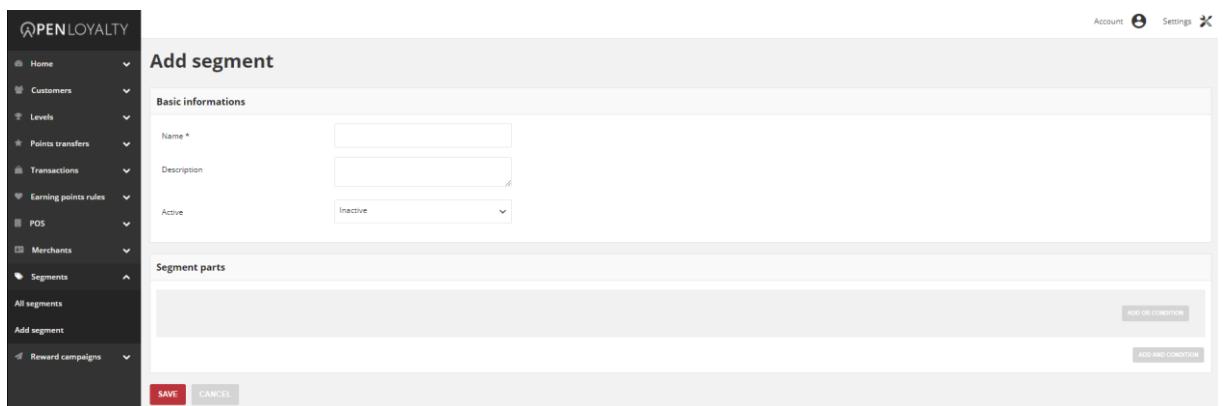
1. On the Admin sidebar, tap **Segments**. Then, choose **All segments**
2. In the Segment list, find the segment that you want download customers list and click **Download** () icon in the **Action** column.

After clicking, the list of customers will be download in .CSV format.

CHAPTER 20:

CREATING CUSTOMER SEGMENT

You can create unlimited amount customizable customers segments for your loyalty program based on various criteria's.

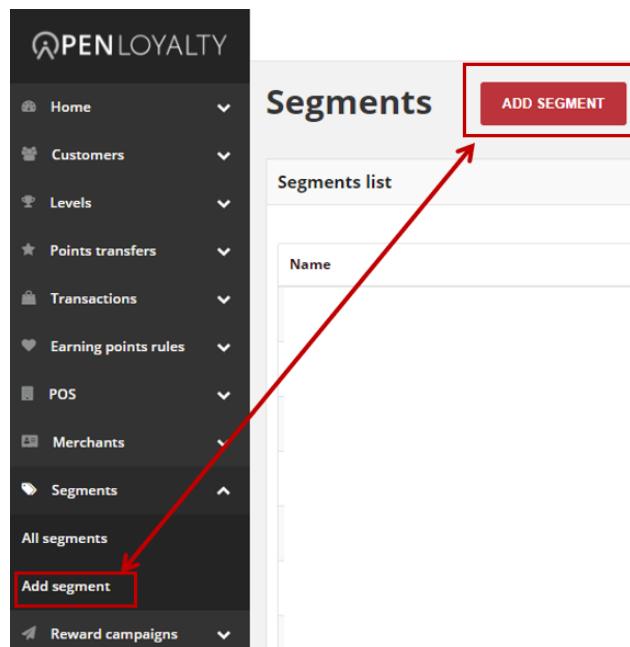


The screenshot shows the 'Add segment' interface. On the left is a dark sidebar with the 'OPEN LOYALTY' logo and navigation links: Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments (selected), All segments, Add segment, and Reward campaigns. The main area is titled 'Add segment' and contains two sections: 'Basic informations' (with fields for Name*, Description, and Active status set to 'Inactive') and 'Segment parts' (with a large input field and buttons for adding conditions). At the bottom are 'MOVE', 'CANCEL', and a large red 'CREATE' button.

Add New Segment

To create a New Customer Segment:

1. On the Admin sidebar, tap **Segments**. Then, choose **Add segment**. You can also add segment directly from **All segments** list by clicking **Add segment** at the top of the page.



Add Segment Options

2. In the **Basic informations** section, do the following:

The screenshot shows the 'Add segment' interface. At the top, it says 'Add segment'. Below that is a section titled 'Basic informations'. Inside this section, there are three input fields: 'Name *' with a placeholder 'Name', 'Description' with a placeholder 'Description', and 'Active' with a dropdown menu currently set to 'Inactive'.

Basic Informations Section

- a. Enter a unique segment **Name** to identify the customer segment when working in the Admin
 - b. Enter a brief **Description** that explain purpose of the segment for internal reference
 - c. To activate the customer segment, in **Active** field select "**Active**" from the dropdown list
3. In **Segment Parts** set the conditions that must be met to assign the customer to this segment. One Segment consists of one or more conditions. Conditions can be combined through AND and OR logical operators.
- a. **AND Condition** is used to perform a logical conjunction on two conditions. Both conditions linked with this operator must be true. For example, you can create segment with a list of customers who made purchase in specific POS and bought specific SKU. The list will contain customer who met both, 1st and 2nd condition.
 - b. **OR Condition** is used to perform a logical disjunction on two conditions. At least one of conditions linked with this operator must be true. For example you can create segment with a list of customers who made purchase in specific POS or bought specific SKU. List will contain customer who met only the 1st condition, who met only the 2nd condition and met both conditions.

The screenshot shows the 'Segment parts' configuration screen. It has a header 'Segment parts'. Below it, there's a table-like structure for defining a condition. The first row has 'Type *' (set to 'Average transaction value') and a delete icon. The second row has 'Min value *' and 'Max value *'. At the bottom right of the table area are three buttons: 'ADD OR CONDITION', 'ADD AND CONDITION', and another 'ADD OR CONDITION' button.

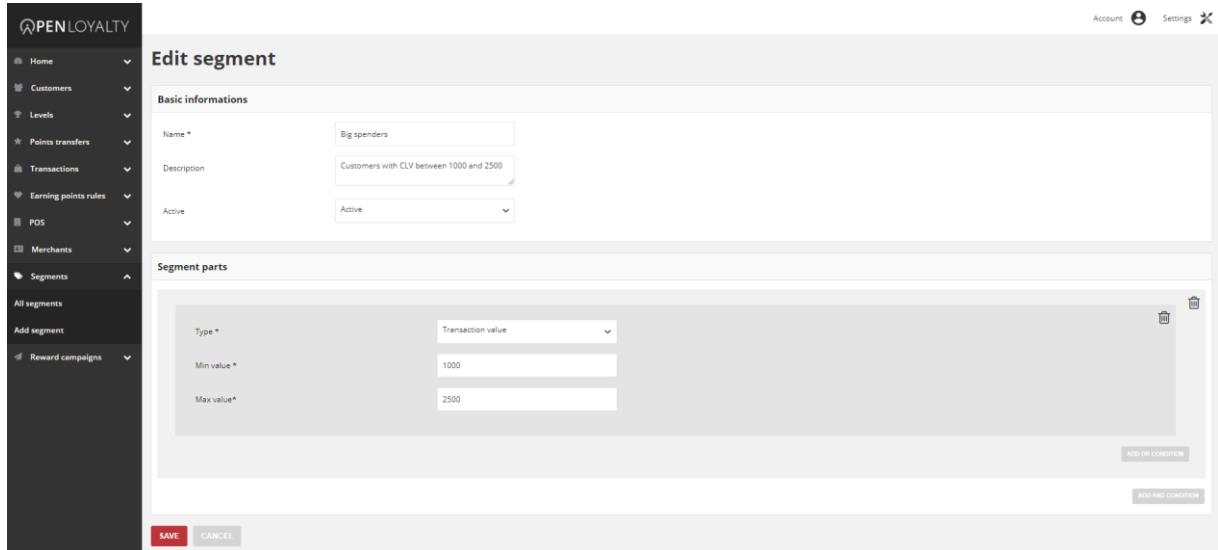
Segment Parts Section

To learn more about conditions type, see [Segment parts types](#)

4. You can simply remove condition by clicking bin () icon in a particular row.
5. When complete, tap **Save**

Updating segments data

You can edit all data provided during segment creation process. You can update segment data by selecting it's record from **All segments** list.



Segment Edition

To edit a Segment:

1. On the Admin sidebar, tap **Segments**. Then, choose **All segments**.
2. In the Segments list, find the record to be edited and click **Edit** () icon in the Action column to open the segment in edit mode.
3. Make any necessary changes to the segment data
4. When complete, tap **Save**

Activate/deactivate Segment

Any Segments from the list can be activated and deactivated by Admin user.

To activate/deactivate Segment:

1. On the Admin sidebar, tap **Segments**. Then, choose **All segments**. You can also deactivate/activate segment from **Edit mode**

2. In the Segments list, find the segment to be deactivated and click **Active** in the **Active** column. The button in the column change to **Inactive** and appear as a grey-out.

Active
INACTIVE
ACTIVE
ACTIVE
ACTIVE

Active Column

When you deactivate segments, customers accounts assigned to this level will not be refreshed and new customers will not be associated to it.

3. To activate the segment click **Inactive** in the **Active** column. The button in the column change to **Active** and appears as a red.

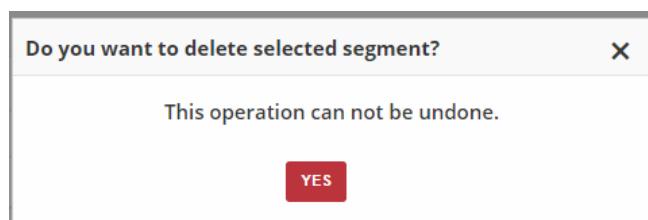
Customer can be assigned only to Active segments

Remove Segment

You can also delete Segment from the Admin.

To delete a Segment:

1. On the Admin sidebar, tap **Segments** Then, choose **All segments**.
2. In the Segments list, find the record to be deleted and click **Remove** (x) icon in the Action column to delete the segment.
3. System display a message asked you to confirm the action. To confirm tap **Yes**



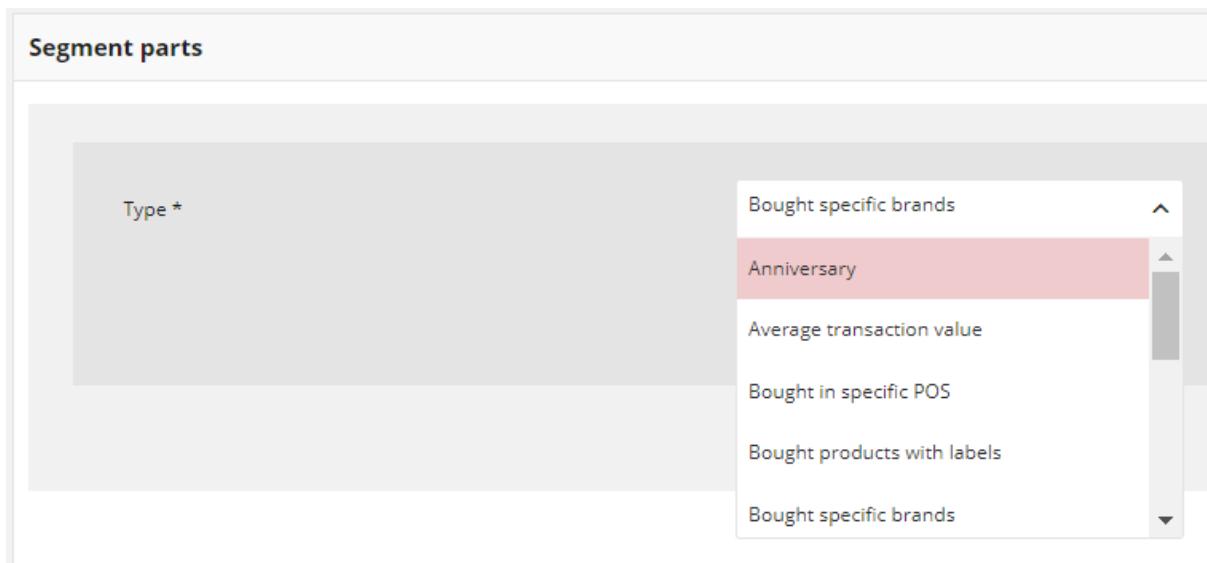
Removing Segment Action

CHAPTER 21:

SEGMENT PARTS TYPES

The assignment process is carried out by the application based on defined rules. Customers who meet all criteria will be assigned to the segment. The criteria consist of conditions that can be combined through AND (conjunction of sets) and OR (disjunction of sets) logical operators.

During creation of Segment you must specify Segment parts type, describing conditions for assigning customer. Every type has its own required fields that must be filled, to specified condition.



Segment Parts Types

Open Loyalty offer following standard types:

- a. **Anniversary** – Customers who have registration/birthday anniversary in specify number of days
- b. **Average transaction amount** – Customers whose average transaction value is between the limits
- c. **Bought in specific POS** - Customers who made purchase in selected POS
- d. **Bought products with labels** - Customers who bought products where label on product is one of the list
- e. **Bought specific brands** – Customers who bought products of a given brand
- f. **Bought specific SKU** – Customers who bought specific products (on the basis of selected SKU)
- g. **Customer who has such labels** – Customers whose label on is one of the list
- h. **Customers who has such labels value** – Customers whose labels value on is one of the list

- i. **Last purchase was n days ago** – Customers who have made their last purchase n-days ago
- j. **Purchase period** – Customers who made purchase (at least one) between the specified days
- k. **Transaction count** – Customers whose number of purchases is within the defined range
- l. **Transaction percent in POS** – Customers whose number of purchases in a specified POS is within defined percent amount.
- m. **Transaction value** – Customers whose overall amount of purchases is between the limits

Anniversary

Segment of customers who have registration or birthday anniversary in specify number of days . During creation, you need to specify whether to include dates of birth or registration dates and number of **days** before anniversary occurs.

For example, you can create segment of customers who have birthday within 14 days from today.

The screenshot shows a 'Segment parts' configuration screen. It has two main sections: 'Type *' and 'Days*'. The 'Type *' section contains a dropdown menu set to 'Anniversary'. The 'Days*' section contains an empty input field.

Anniversary Type

Field description

FIELD	DESCRIPTION
Type	Anniversary type. Options include: <ul style="list-style-type: none"> Birthday Registration
Days	Number of days before anniversary occurs For example, if Days is equal to 7 then all customer, with anniversary type within 7 days from today will be assigned to segment

Average transaction value

Segment of customers whose average transaction value is within the defined range. During creation, you need to specify **Minimum** and **Maximum** value to define the range in which the average transaction amount must be found.

The screenshot shows a user interface for defining segment parts. At the top, there is a header labeled "Segment parts". Below it, a dropdown menu is open, showing "Average transaction value" as the selected option. There are also two input fields below the dropdown: one for "Min value" and one for "Max value".

Average Transaction Value Type

Field description

FIELD	DESCRIPTION
Min value	Determines the minimum value of the average transaction amount of customer account
Max value	Determines the maximum value of the average transaction amount of customer account

Bought in specific POS

Segment of customers who have made purchase (at least one) in selected POS. During creation, you need to specify list of one or more stores (POS) that will be included. You create the list by drag the selected POS name from left column to the right one.

The screenshot shows a user interface for creating a segment. At the top, a header reads "Segment parts". Below it, a section titled "Type *" has a dropdown menu set to "Bought in specific POS". Underneath, a section titled "Choose POS *" contains two columns. The left column lists "eCommerce 2" and "eCommerce 1". The right column lists "Off-line store 1" and "Off-line store 2".

Bought in POS Type

Field description

FIELD	DESCRIPTION
Choose POS	First column list all available POS within your Loyalty Program. Second column list all selected POS which transaction will be included. To choose POS drag the POS name to the second column.

Bought products with labels

Segment of customers who bought products where label on product is one of the list. Labels are key-value pairs that you can attach to a products. Each of list element has two values – **Key**, which is a label name, and **Value**, which is a label value. Both field need to be filled out.

Enter your key and value to add a product label. To apply additional labels, click **Add label**

The screenshot shows a user interface for creating a segment. At the top, a dropdown menu is set to "Bought products with labels". Below it, there are two input fields: "Key *" and "Value *". A red "ADD LABEL" button is located at the bottom of this section. The entire interface is titled "Segment parts".

Bought Labels Type

Field description

FIELD	DESCRIPTION
Key	Product label name
Value	Value of product label with specified in previous step Key

Bought specific brands

Segment of customers who bought product or products of a given brand. During creation, you need to specify one or more **Brands** that will be included.

The screenshot shows a user interface for creating a segment. At the top, a dropdown menu is set to "Bought specific brands". Below it, there is an input field labeled "Brands *" containing the text "Example X". A small "X" icon is located to the right of the input field, likely for clearing the value. The entire interface is titled "Segment parts".

Bought Brands Type

Field description

FIELD	DESCRIPTION
Brands	Selected Brands

Bought specific SKU

Segment of customers who bought specific products (on the basis of selected SKU). During creation, you need to specify one or more **SKUs** that will be included.

The screenshot shows a user interface for creating a segment part. At the top, it says "Segment parts". Below that, there is a section labeled "Type *". A dropdown menu is open, showing "Bought specific SKU" as the selected option. Below the dropdown, there is a text input field labeled "SKUs *". Inside the input field, the text "SKU123" is entered, followed by a delete button ("X") and a cursor. The entire interface has a light gray background with white and light blue UI elements.

Bought SKUs Type

Field description

FIELD	DESCRIPTION
SKUs	Selected products

Customers who has such labels

Segment of customers whose label value on is one of the list. Labels are key-value pairs that you can attach to a customer during **customer account creation**.

Enter your label **Key** to add a customer label that will be included. To apply additional labels, click **Add label**

The screenshot shows a user interface for creating a segment part. At the top, it says "Segment parts". Below that, there's a dropdown menu labeled "Type *" which is set to "Customers who has such labels". Underneath the dropdown, there's a field labeled "Key *". At the bottom of the form, there's a button labeled "ADD LABEL".

Customers Labels Type

Field description

FIELD	DESCRIPTION
Key	Customer label name

Customers who has such labels value

Segment of customers whose label value on is one of the list. Labels are key-value pairs that you can attach to a customer during **customer account creation**. Each of list element has two values – **Key**, which is a label name, and **Value**, which is a label value. Both field need to be filled out.

Enter your key and value to add a customer label that will be included. To apply additional labels, click **Add label**

The screenshot shows a 'Segment parts' configuration screen. Under 'Type *', a dropdown menu is set to 'Customers who has such labels values'. Below it, there are two input fields: 'Key +' and 'Value +' both containing empty white boxes. At the bottom left is a 'ADD LABEL' button.

Customer Labels Value Type

Field description

FIELD	DESCRIPTION
Key	Customer label name
Value	Value of customer label with specified in previous step Key

Last purchase was n days ago

Segment of customers who have made their last purchase n-days ago. During creation, you need to specify number of **Days** back, that will be included.

The screenshot shows a 'Segment parts' configuration screen. Under 'Type *', a dropdown menu is set to 'Last purchase was n days ago'. Below it, there is one input field labeled 'Days +' containing an empty white box.

Last Purchase Type

Field description

FIELD	DESCRIPTION
Days	Number of days back For example, if Days is equal to 7 then all customers, who made their last purchase within 7 days back from today will be assigned to segment

Purchase period

Segment of customers who made purchase (at least one) between the specified date range. During creation, you need to specify the start and end date that will create a time boundaries from which purchases will be included.

The screenshot shows a user interface for creating a segment part. At the top, a dropdown menu labeled "Type *" is set to "Purchase period". Below it are two input fields: "Date from *" and "Date to *". Both fields have placeholder text "YYYY-MM-DD HH:mm".

Purchase Period Type

FIELD	DESCRIPTION
Date from	Start date from which customers purchases will be included
Date to	End date until which customers purchases will be included

Transaction count

Segment of customers whose number of purchases is within the defined range. During creation, you need to specify **Minimum** and **Maximum** number to define the range in which the number of transactions must be found.

The screenshot shows a user interface for creating a segment part. At the top, a dropdown menu labeled "Type *" is set to "Transaction count". Below it are two input fields: "Min *" and "Max *". Both fields are currently empty.

Transaction Number Type

Field description

FIELD	DESCRIPTION
Min	Determines the minimum number of transactions of customer account
Max	Determines the maximum number of transactions of customer account

Transaction percent in POS

Segment of customers whose number of purchases in a specified POS is within defined percent amount. During creation, you must specify one **POS** (store) that will be included and transaction percentage to be analyzed within that POS.

For example, you can create a segment of customers whose 20% of all transactions are transactions in a given POS.

The screenshot shows a user interface for creating a segment part. At the top, it says "Segment parts". Below that, there's a section labeled "Type *". A dropdown menu is open, showing "Transaction percent in POS" as the selected option. Below the dropdown are two input fields: "POS *" and "Percent*".

Transaction Percent Type

Field description

FIELD	DESCRIPTION
POS	Store which transaction will be included. To choose store select POS name from a dropdown list
Percent	Percent amount of transaction in a selected POS

Transaction value

Segment of customers whose overall amount of purchases is between the limits. During creation, you need to specify **Minimum** and **Maximum** value to define the range in which the value of all transactions must be found.

Segment parts

Type *	Transaction value
Min value *	
Max value*	

Transaction Value Type

Field description

FIELD	DESCRIPTION
Min value	Determines the minimum value of all transactions value of customer account
Max value	Determines the maximum value of all transactions value of customer account

REWARD CAMPAIGNS

In this section of the guide you will be familiar with creating and managing rewards available within your Loyalty Program. You will learn what type of rewards can be choose, how to assigned reward to specify customers, define activity time and manage reward details. You will also learn how to verify which rewards have been already redeemed and by which customers.

REWARD CAMPAIGNS MENU

All reward campaigns

- Customers assigned to reward
- Reward campaign details preview

Redeemed rewards

- Mark Redeemed reward as used

CREATING REWARD CAMPAIGN

- Updating reward data
- Activate/deactivate Reward campaign
- Conditions of reward availability to Customer:

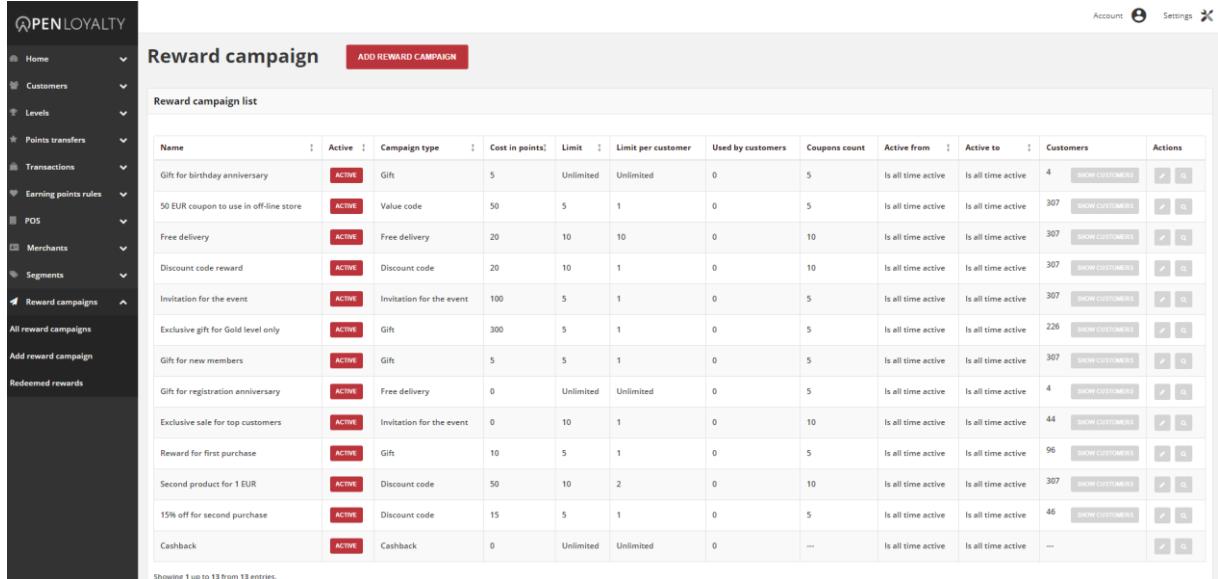
CHAPTER 22:

REWARD CAMPAIGNS MENU

Customers can redeem points toward various rewards, based on the cost in points of each that you establish during reward creation. When customer reaches the defined amount of points, points can be spent for a reward. Redeemed reward appears automatically in Redeemed rewards menu. During creation you can specify for each reward e.g.:

- How many points customer need to spent to get reward
- How many times rewards can be used by one customer
- How many times reward can be used during all campaign
- To which customer reward will be visible and ready to use
- Time boundaries when reward will be active
- Reward value

For example, a coupon code can be created for a specific customer group, or for anyone who makes a purchase over a certain amount (segment). To apply the coupon to a purchase, the customer can enter the coupon code in your online store, or possibly at the cash register of your offline store.



The screenshot shows the 'Reward campaign' section of the Open Loyalty app. On the left, there's a sidebar with navigation links like Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, and two main categories: 'Reward campaigns' (which is expanded) and 'All reward campaigns'. Under 'Reward campaigns', there are links for 'Add reward campaign' and 'Redeemed rewards'. The main area is titled 'Reward campaign' with a 'ADD REWARD CAMPAIGN' button. Below that is a table titled 'Reward campaign list' with 13 entries. The columns include Name, Active, Campaign type, Cost in points!, Limit, Limit per customer, Used by customers, Coupons count, Active from, Active to, Customers, and Actions. Each row shows a different reward campaign with its details. At the bottom of the table, it says 'Showing 1 up to 13 from 13 entries.'

Name	Active	Campaign type	Cost in points!	Limit	Limit per customer	Used by customers	Coupons count	Active from	Active to	Customers	Actions
Gift for birthday anniversary	ACTIVE	Gift	5	Unlimited	Unlimited	0	5	Is all time active	Is all time active	4	Show customers Edit Q
50 EUR coupon to use in off-line store	ACTIVE	Value code	50	5	1	0	5	Is all time active	Is all time active	307	Show customers Edit Q
Free delivery	ACTIVE	Free delivery	20	10	10	0	10	Is all time active	Is all time active	307	Show customers Edit Q
Discount code reward	ACTIVE	Discount code	20	10	1	0	10	Is all time active	Is all time active	307	Show customers Edit Q
Invitation for the event	ACTIVE	Invitation for the event	100	5	1	0	5	Is all time active	Is all time active	307	Show customers Edit Q
Exclusive gift for Gold level only	ACTIVE	Gift	300	5	1	0	5	Is all time active	Is all time active	226	Show customers Edit Q
Gift for new members	ACTIVE	Gift	5	5	1	0	5	Is all time active	Is all time active	307	Show customers Edit Q
Gift for registration anniversary	ACTIVE	Free delivery	0	Unlimited	Unlimited	0	5	Is all time active	Is all time active	4	Show customers Edit Q
Exclusive sale for top customers	ACTIVE	Invitation for the event	0	10	1	0	10	Is all time active	Is all time active	44	Show customers Edit Q
Reward for first purchase	ACTIVE	Gift	10	5	1	0	5	Is all time active	Is all time active	96	Show customers Edit Q
Second product for 1 EUR	ACTIVE	Discount code	50	10	2	0	10	Is all time active	Is all time active	307	Show customers Edit Q
15% off for second purchase	ACTIVE	Discount code	15	5	1	0	5	Is all time active	Is all time active	46	Show customers Edit Q
Cashback	ACTIVE	Cashback	0	Unlimited	Unlimited	0	---	Is all time active	Is all time active	--	Edit Q

Reward Campaign Menu

To display the Reward campaigns menu:

On the Admin sidebar, tap **Reward campaigns**, then choose **All reward campaigns**.

Menu options

Showing 1 up to 28 from 280 entries.

All reward campaigns

Lists all rewards within your loyalty program, with additional information about its type, activity, limits, points costs and customers who can redeem each reward.

Add reward campaign

Lists all data that need to be filled out to add new reward to your Loyalty Program

Showing 1 up to 8 from 8 entries.

Redeemed rewards

Lists all redeemed rewards with additional information who and when redeemed reward and it's status – delivered or used.

All reward campaigns

The All reward campaigns grid provide information about all rewards within your Loyalty Program with information about type, status, cost in points, limits of use, if and how many times reward has been used by customers and time boundaries of activity. Moreover, you can also see how many customers could use reward and preview theirs details.

Name	Active	Campaign type	Cost in points	Limit	Limit per customer	Used by customers	Coupons count	Active from	Active to	Customers	Actions
Gift for birthday anniversary	ACTIVE	Gift	5	Unlimited	Unlimited	0	5	Is all time active	Is all time active	13	SHOW CUSTOMERS
50 EUR coupon to use in off-line store	ACTIVE	Value code	50	5	1	0	5	Is all time active	Is all time active	307	SHOW CUSTOMERS
Free delivery	ACTIVE	Free delivery	20	10	10	0	10	Is all time active	Is all time active	307	SHOW CUSTOMERS
Discount code reward	ACTIVE	Discount code	20	10	1	0	10	Is all time active	Is all time active	307	SHOW CUSTOMERS
Invitation for the event	ACTIVE	Invitation for the event	100	5	1	0	5	Is all time active	Is all time active	307	SHOW CUSTOMERS
Exclusive gift for Gold level only	ACTIVE	Gift	300	5	1	0	5	Is all time active	Is all time active	226	SHOW CUSTOMERS
Gift for new members	ACTIVE	Gift	5	5	1	0	5	Is all time active	Is all time active	307	SHOW CUSTOMERS
Gift for registration anniversary	ACTIVE	Free delivery	0	Unlimited	Unlimited	0	5	Is all time active	Is all time active	13	SHOW CUSTOMERS
Exclusive sale for top customers	ACTIVE	Invitation for the event	0	10	1	0	10	Is all time active	Is all time active	44	SHOW CUSTOMERS
Reward for first purchase	ACTIVE	Gift	10	5	1	0	5	Is all time active	Is all time active	0	SHOW CUSTOMERS
Second product for 1 EUR	ACTIVE	Discount code	50	10	2	0	10	Is all time active	Is all time active	307	SHOW CUSTOMERS
15% off for second purchase	ACTIVE	Discount code	15	5	1	0	5	Is all time active	Is all time active	0	SHOW CUSTOMERS
Cashback	ACTIVE	Cashback	0	Unlimited	Unlimited	0	--	Is all time active	Is all time active	--	SHOW CUSTOMERS

All Reward Campaigns

Use the standard controls to sort the list and apply actions to selected rewards record (modify, preview details). Pagination controls appear if there are more rewards records than fit on the page, and are used to move from one page to the next.

Field description

FIELD	DESCRIPTION
Name	Name of the reward
Active	Reward campaign current status. It has higher priority than time Activity . Option include: Active/Inactive. Customer can redeem only Active reward.
Campaign type	Reward type. Option include: <ul style="list-style-type: none"> • Cashback • Discount code • Free delivery • Gift • Invitation for the event • Value code
Cost in points	How many points Customer must spend to redeem reward

Limit	Information about limit the redeem of rewards globally.
Limit per customer	Information about limit the redeem of rewards by one customer
Used by customers	Information how many times reward has been redeemed
Coupons count	Information about number of coupons available to redeem
Active from	Day from which reward is active, so visible and available to use for customers
Active to	Day until reward can be redeem. After that day reward will not be visible for customer and unavailable to use
Customers	Show number of customers who could redeem reward. After Show customers click, list of these customer details will be shown.
Actions	The operations that can be applied to selected reward. Options include: <ul style="list-style-type: none"> • Edit reward details • View reward details

Customers assigned to reward

You can simply view not only the number but also the list of customers with details who could redeem reward.

To display the list of customers:

1. On the Admin sidebar, tap **Reward campaigns**. Then, choose **All reward campaigns**.
2. In the Reward campaigns list, find the reward you want to see customers list and click **Show customers** in the **Customers** column. After clicking, the list of customers will be opened, filtered according to the selected reward.

The screenshot shows the OpenLoyalty Admin interface. On the left, there's a sidebar with various navigation items like Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, and Reward campaigns. Under Reward campaigns, 'All reward campaigns' is selected. Below the sidebar, there's a section titled 'Users in campaign Gift for birthday anniversary'. This section has a header 'List of customers' and a table with columns: First name, Last name, Phone, E-mail, Gender, Birth date, Created at, and Actions. The table lists 15 customers with their respective details. At the top right of the interface, there are 'Account', 'Settings', and a close button.

First name	Last name	Phone	E-mail	Gender	Birth date	Created at	Actions
Eric	Cruickshank	+3150597985827	langworth.cristian@example.com	male	1971-06-15	2016-12-12 09:21	<input type="checkbox"/> <input type="checkbox"/>
Karl	Bolk	not set	karl@openloyalty.io	male	2018-06-06	2018-06-06 10:44	<input type="checkbox"/> <input type="checkbox"/>
Katrine	O'Hara	+8820158120949	langosh.virginia@example.org	male	1963-06-08	2018-05-22 17:50	<input type="checkbox"/> <input type="checkbox"/>
Deborah	Littel	+4401221013266	ngulgowski@example.com	male	1997-06-15	2018-05-19 03:05	<input type="checkbox"/> <input type="checkbox"/>
Barrett	Hamill	+1269974701341	lexus.carter@example.com	male	1969-06-15	2016-10-15 12:30	<input type="checkbox"/> <input type="checkbox"/>
Jared	Nitzsche	+3127327981644	letha72@example.net	female	2001-06-07	2018-05-25 01:43	<input type="checkbox"/> <input type="checkbox"/>
Wilburn	Gorczany	+344179090556	zulaut.hertha@example.com	male	1985-06-14	2016-10-19 17:37	<input type="checkbox"/> <input type="checkbox"/>
Javonte	Kunde	+5619151090320	bartscholome52@example.org	female	1989-06-06	2018-05-28 01:28	<input type="checkbox"/> <input type="checkbox"/>
Clint	Tillman	+2722481833182	ctremblay@example.com	female	1976-06-09	2016-11-10 23:56	<input type="checkbox"/> <input type="checkbox"/>
Lionel	Hodkiewicz	+8199751226225	hettie51@example.com	male	1997-06-16	2016-10-09 12:54	<input type="checkbox"/> <input type="checkbox"/>
Larissa	Hyatt	+115700331656	noemy19@example.net	male	1973-06-11	2016-10-08 08:43	<input type="checkbox"/> <input type="checkbox"/>
Palma	Sauer	+661684004409	lily62@example.org	female	1958-06-06	2016-12-03 21:22	<input type="checkbox"/> <input type="checkbox"/>
Karl2	Bolk	not set	kbzik@divante.co	male	2018-06-06	2018-06-06 10:53	<input type="checkbox"/> <input type="checkbox"/>

List of Customers in Reward Campaign

Use the standard controls to sort the list and apply actions to selected customers (edit and view). Pagination controls appear if there are more customer records than fit on the page, and are used to move from one page to the next.

Reward campaign details preview

You can see details of each reward campaign directly from All reward campaigns menu. Campaign details include all data provided during **creation process**.

To view reward detail information:

1. On the Admin sidebar, tap **Reward campaigns**. Then choose **All reward campaigns**.
2. In the Reward campaign list, find the reward to be preview and click **View** (🔍) icon in the Action column to open the reward in view mode.
3. If applicable, you can simply go to **edit mode** to change previewed reward data by clicking **Edit** (✍) icon in the upper right corner

Campaign details	
Name:	Free delivery
Campaign type:	free_delivery_code
Short description:	Sample free delivery reward
More information link:	---
Condition description:	Terms and conditions of reward
Cost in points:	20
Reward value:	100
Tax:	---
Tax value:	---
Active:	Active
Levels:	Gold VIP Bronze Silver
Limit:	10
Limit per customer:	10
Coupons:	1 2 3 4 5 6 7 8 9 10
How to use coupons?:	Instructions how to use coupon
All time visible:	true
All time active:	true

Campaign Details Preview

Field description

FIELD	DESCRIPTION
Name	Name of the reward
Campaign type	<p>Reward type. Option include:</p> <ul style="list-style-type: none">• Cashback• Discount code• Free delivery• Gift

	<ul style="list-style-type: none"> • Invitation for the event • Value code
Short description	Brief description of the reward
More information link	URL to linked page with more information about the reward
Condition description	Brief description of the conditions of getting a reward
Cost in points / Point value	<p>1) Point value displayed only when Cashback is selected. Monetary value of the points to define the number of points that can be applied as a refund towards the amount of order</p> <p>2) Cost in points displayed for any other campaign type. Number of points represented by the reward to define how many points customer needs to spend to get a reward</p>
Reward value	Value of reward
Tax	Percentage value of tax for reward
Tax value	Value of tax for reward
Active	Reward campaign status. Option include: Active/Inactive
Levels / Segments	<p>Identify the customer group that qualifies to receive the reward</p> <p>1) Levels are displayed when Campaign target type is Level 2) Segments are displayed when Campaign target type is Segment</p>
Limit	<p>Define how many coupon codes could be used during time boundaries when reward is available.</p> <p><u>Not displayed when:</u></p> <ul style="list-style-type: none"> • Usage of code number is unlimited • Cashback is selected
Limit per customer	<p>Define how many coupon codes could be used by one customer during time boundaries when reward is available.</p> <p><u>Not displayed when:</u></p> <ul style="list-style-type: none"> • Usage of code number is unlimited • Cashback is selected
Coupons	<p>List of Coupon codes to use by Customer.</p> <p>Not displayed when Cashback selected.</p>
How to use coupons?	<p>Description how Customer can use discount code.</p> <p>Not displayed when Cashback selected.</p>
All time visible	Define is reward always visible for customers on the storefront. Options include: true/false
All time active	Define is reward always available for customers to choose and use. Options include: true/false

Redeemed rewards

Redeemed reward is an instance of reward that Customer has bought with Points or earned for performing specified action.

There is possibility to get:

- virtual reward - as a Discount or Value Code, free delivery
- physical reward - which will be send to Customer, e.g. printed coupon, gift, etc.
- cashback

Not enough points

If Customer does not have enough points to redeem reward then Redeem reward button will be disabled (greyed out).

When mouse hover over disabled button then tooltip will show "You must have <>reward cost - customer active points>> more points to get reward.".

Redeemed reward from Admin perspective

Redeemed reward management could be performed only from Administrator Cockpit by user who has Admin privileges.

Redeemed rewards list grid provide an information about which customer and when redeemed given reward. Moreover, you can check whether reward is **Delivered** (customer choose reward and spent points but he has not used it yet) or **Used** (customer used coupon code during purchase, gift was sent to customer etc.)

The screenshot shows the 'Redeemed rewards' section of the Open Loyalty Admin Cockpit. The left sidebar contains navigation links for Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, and Reward campaigns. Under Reward campaigns, 'All reward campaigns', 'Add reward campaign', and 'Redeemed rewards' are listed, with 'Redeemed rewards' being the active tab. The main area is titled 'Reedemed rewards' and displays a table titled 'Reedemed rewards list'. The table columns are Date and time, Customer e-mail, Phone, Reward, Type, and Delivered/used. The table contains six entries with the following data:

Date and time	Customer e-mail	Phone	Reward	Type	Delivered/used
2018-06-06 13:57	user@oloy.com	+48234234000	Free delivery	Free delivery	<input type="checkbox"/>
2018-06-06 10:19	user@oloy.com	+48234234000	Set of cups	Gift	<input type="checkbox"/>
2018-06-04 12:26	user@oloy.com	+48234234000	Luggage	Gift	<input type="checkbox"/>
2018-06-04 12:10	user@oloy.com	+48234234000	Fridge	Gift	<input type="checkbox"/>
2018-05-30 09:44	user@oloy.com	+48234234000	Iphone	Gift	<input type="checkbox"/>
2018-05-29 13:21	user@oloy.com	+48234234000	Divante T-shirt	Gift	<input type="checkbox"/>

At the bottom of the table, it says 'Showing 1 up to 6 from 6 entries.'

Redeemed Rewards

Use the standard controls to sort the list by **Date and time** and filter list to get a register of reward that are **Delivered** or **Used**. By default Redeemed rewards grid show both – delivered and used reward. Pagination controls appear if there are more redeemed rewards records than fit on the page, and are used to move from one page to the next

To see all Redeemed rewards:

1. On the Admin sidebar, tap **Reward campaigns**. Then choose **Redeemed rewards**.

Field description

FIELD	DESCRIPTION
Date and time	Date when reward was redeemed
Customer e-mail	Email address of customer who redeemed reward. E-mail address is used as an identification factor to verify which customer choose particular reward.
Phone	The customer's phone number. Can be used also as an identification factor.
Reward	Name of the reward
Type	Reward type. Option include: <ul style="list-style-type: none">• Cashback• Discount code• Free delivery• Gift• Invitation for the event• Value code
Delivered/Used	Redeemed reward statuses. Option include: <ul style="list-style-type: none">• Delivered – blank checkbox• Used – marked checkbox To learn how to select reward as a used, see Mark Redeemed rewards as used

Mark Redeemed reward as used

From the Admin you can mark selected redeemed reward record as a Used, when customer used coupon code during purchase, you sent gift which customer selected from his cockpit etc.

On the Redeemed rewards list, **Used** rewards will have a marked checkbox in the column Delivered/used, unlike to those **Delivered**, which will have an empty checkbox.

To mark reward as a used:

1. On the Admin sidebar, tap **Reward campaigns**. Then, choose **Redeemed rewards**.

Date and time	Customer e-mail	Phone	Reward	Type	Delivered/used
2018-06-06 13:57	user@oloy.com	+48234234000	Free delivery	Free delivery	<input checked="" type="checkbox"/>
2018-06-06 10:19	user@oloy.com	+48234234000	Set of cups	Gift	<input checked="" type="checkbox"/>
2018-06-04 12:26	user@oloy.com	+48234234000	Luggage	Gift	<input type="checkbox"/>
2018-06-04 12:10	user@oloy.com	+48234234000	Fridge	Gift	<input type="checkbox"/>
2018-05-30 09:44	user@oloy.com	+48234234000	Iphone	Gift	<input checked="" type="checkbox"/>
2018-05-29 13:21	user@oloy.com	+48234234000	Divante T-shirt	Gift	<input type="checkbox"/>

Delivered/used Redeemed Rewards

2. In the Redeemed reward list list, find the reward you want to mark as Used and click checkbox in the **Delivered/used** column.

CHAPTER 23:

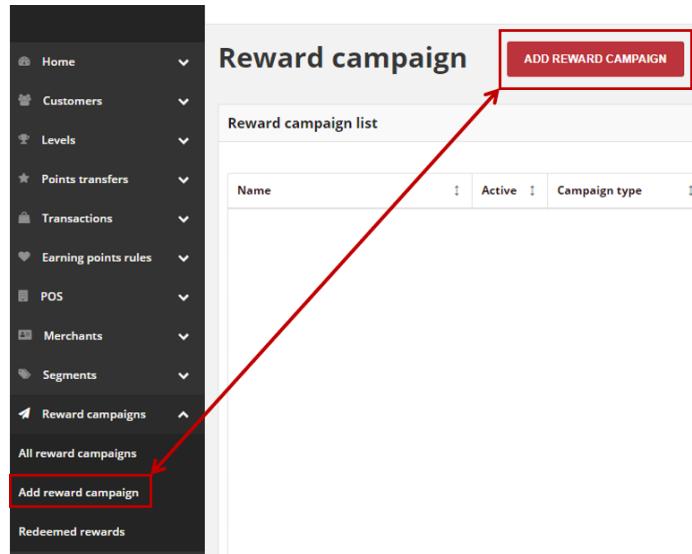
CREATING REWARD CAMPAIGN

Open Loyalty Reward campaigns gives you the ability to create unique rewards that customer can be awarded for a wide range of transaction and activities within your loyalty program. During creation you determine time boundaries, when reward is available for customer, customers groups for whom the reward is available and defines the basic operating parameters.

The screenshot shows the 'Add reward campaign' form. On the left is a dark sidebar with navigation links: Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, Reward campaigns (selected), All reward campaigns, Add reward campaign, and Redeemed rewards. The main area has tabs for 'Campaign type', 'Campaign details', and 'Target'. Under 'Campaign type', there's a dropdown for 'Campaign type *'. Under 'Campaign details', fields include 'Name *' (with a placeholder 'Reward'), 'Short description', 'More information link', 'Active *' (set to 'Inactive'), 'Reward value' (with a placeholder 'Value of reward'), 'Tax' (with a placeholder 'Percentage Value of tax for reward'), 'Tax value' (with a placeholder 'Value of tax for reward'), and 'Reward value' (with a placeholder 'Value of reward'). At the bottom right is a button labeled 'Add New Reward'.

To create a New Reward Campaign:

1. On the Admin sidebar, tap **Reward campaigns**. Then, choose **Add reward campaign**. You can also add new reward directly from **All reward campaigns** list by clicking **Add reward campaign** at the top of the page.



Add Reward Options

2. In the **Campaign type** section, select a reward type from a dropdown list, to one of the following:

The screenshot shows the 'Add reward campaign' form. In the 'Campaign type' section, there is a dropdown menu with several options: Cashback, Discount code, Free delivery (which is highlighted with a pink background), Gift, Invitation for the event, and Value code.

Campaign Type

Cashback	cash refund for customer bank account after making their purchase
Discount code	percentage discount applied to reduce order amount, e.g. 25% off for next purchase
Free delivery	free shipping promotion
Gift	material article offer as a present (without payment), e.g. book
Invitation for the event	invitation for business & corporate events or other depending on your business, e.g. conference
Value code	value discount applied to reduce order amount, e.g. 25 EUR off for next purchase

Depending on the selected **Campaign type**, a next section -**Campaign details** will display different fields to filled in. Different fields are required for Cashback, than for other types i.e. discount code, free delivery etc.

3. When you choose **Cashback**, In the Campaign details section do the following:

Campaign type	
Campaign type *	Cashback

Campaign details	
Name *	<input type="text"/>
Short description	<input type="text"/>
More information link	<input type="text"/>
Active *	Inactive
Point value *	<input type="text"/> Each point will be exchanged for provided value (in current currency)
Reward value	<input type="text"/>
Tax	<input type="text"/> Percentage Value of tax for reward
Tax value	<input type="text"/> Value of tax for reward
Reward value	<input type="text"/> Value of reward

Cashback Campaign Details

- a. Enter unique reward **Name**
- b. If needed, provide a **Short description** of the reward campaign
- c. If needed, enter URL to the content page in **More information link** field, that explains your reward campaign.
- d. To make reward available for customer, in **Active** field select status "**Active**" from the dropdown list
- e. In **Point value** field, enter the monetary value of the points to define the number of points that can be applied as a refund towards the amount of order
- f. If applicable, In **Reward value** field provide a monetary value of reward for better explanation of defined **Point value**
- g. If needed, enter **Tax** rate that applies to the reward, monetary value of tax for reward in **Tax value**

4. When you choose any other than **Cashback**, in the **Campaign details** section do the following:

Campaign type	
Campaign type *	Discount code

Campaign details	
Name *	
Short description	
More information link	
Active *	Inactive
Cost in points *	
Condition description	
Reward value	
Tax	Percentage Value of tax for reward
Tax value	Value of tax for reward
Reward value	Value of reward

Campaign Details

- h. Repeat steps **a-d** from point **3**, and provide reward:

- Name
- Short description, if needed
- More information link, if needed
- Status

i. In **Cost in points** field, enter the number of points represented by the reward to define how many points customer needs to spend to get a reward.

j. If applicable, in **Condition description** field, provide a description of the conditions of getting a reward

k. Repeat steps **f-g** from point **3**, and provide:

- Reward value description
- Tax
- Tax value
- Reward value if needed

5. A reward can be extended to members of a specific customer group. In the **Target** section identify the customer group that qualifies to receive the reward:

Target

- a. In **Target type** field, select from dropdown list Level or Segment to specify whether the reward will be available for customers assigned to particular level or segment
- b. Depending on selected **Target type**, field **Segments** to specify segments or **Levels** to specify levels appear. You can choose one or more levels/segments to used

6. **Activity** section define time boundaries when reward can be used by customers. To make the reward available for a limited period of time, complete the From and To dates in **Activity** section:

Activity

- a. In **Active from** field set the first date the reward is available. You can either enter the date or select it from the calendar.
 - b. In **Active to** field set the last date the reward is available. You can either enter the date or select it from the calendar.
- Active to** and **Active from** fields are available only when reward activity (availability) is limited.
- c. If you want the reward to be active all the time mark **All time active** checkbox. When you choose that option **Active from** and **Active to** fields will not be available.

Status of the Reward campaign (Active/Inactive) has higher priority than time boundaries from Active section.

Even if time boundaries from Activity section will be valid, changing Status to Inactive means that reward will not be available to customers.

7. When you choose any other Campaign type than **Cashback** additional sections to filled in appear.

8. To limit the number of times each customer can use the coupon, enter the number of usage limits in **Limit** section:

The screenshot shows a configuration panel titled 'Limit'. It includes three main options: 'Unlimited' (unchecked), 'Single coupon' (checked), and two input fields for 'Limit *' and 'Limit per customer *'. Below the panel is the word 'Limit'.

Option	Description
Unlimited	<input type="checkbox"/> Customers could use coupon codes without limits
Single coupon	<input checked="" type="checkbox"/> Use of the coupon is limited
Limit *	[Empty input field]
Limit per customer *	[Empty input field]

Limit

a. To limit the number of times the coupon can be used, complete the following:

- Mark **Single coupon** checkbox
- In **Limit** field, define how many reward codes could be used during time boundaries from Activity section
- In **Limit per customer** field, define how many reward codes could be used by one customer during time boundaries from Activity section.

b. For unlimited use, mark **Unlimited** checkbox. When you choose that option **Limit** and **Limit per customer** fields will not be available

9. Add batch of coupons to be used with the reward:

The screenshot shows a configuration panel titled 'Coupons'. It includes three main sections: 'Coupons *' (input field), 'Upload coupons' (button with 'UPLOAD' label), and 'How to use coupons?' (input field). Below the panel is the word 'Coupons'.

Section	Description
Coupons *	[Empty input field]
Upload coupons	[Empty input field] UPLOAD
How to use coupons?	[Empty input field]

Coupons

- a. Select from dropdown list a **Coupons** codes to be used by customer or **Upload coupons** list of codes from CSV file.
- b. If applicable, enter description how to use coupons codes, to display instructions for customers on the storefront.

- 10.** To make the reward visible on the storefront for a limited period of time, complete the From and To dates in **Visibility** section:

Reward Visibility

- a. In **Visible from** field set the first date the reward is visible. You can either enter the date or select it from the calendar.
 - b. In **Visible to** field set the last date the reward is visible. You can either enter the date or select it from the calendar.
- Visible to** and **Visible from** fields are available only when reward visibility is limited.
- c. If you want the reward to be visible all the time mark **All time visible** checkbox. When you choose that option **Visible from** and **Visible to** fields will not be available.

- 11.** If applicable, in **Campaign photo** section upload reward image that will be visible on the storefront

Reward photo

- 12.** When complete, tap **Save**

Image size is limited to 2MB. Image dimensions could not be smaller than 600 x 600 px. Allowed file formats: png, gif, jpg.

Updating reward data

You can edit all data provided during Reward campaign creation process. You can update reward data by selecting it's record from **All reward campaigns** list.

The screenshot shows the 'Edit reward campaign' page. On the left is a sidebar with navigation items like Home, Customers, Levels, Points transfers, Transactions, Earning points rules, POS, Merchants, Segments, Reward campaigns (selected), All reward campaigns, Add reward campaign, and Redeemed rewards. The main area has a title 'Edit reward campaign'. Under 'Campaign type', 'Campaign type *' is set to 'Gift'. Under 'Campaign details', fields include 'Name *' (Gift for birthday anniversary), 'Short description' (Gift reward), 'More information link' (empty), 'Active' (Active), 'Cost in points *' (5), and 'Condition description' (empty). At the bottom right are 'Open' and 'Value of reward' buttons.

Reward Campaign Edition

To edit a Reward campaign:

1. On the Admin sidebar, tap **Reward campaigns**. Then, choose **All reward campaigns**.
2. In the **Reward campaign list**, find the reward to be edited and click **Edit** (edit icon) in the Action column to open the reward campaign in edit mode.
3. Make any necessary changes to the reward data
4. When complete, tap **Save**

Activate/deactivate Reward campaign

Any reward from the list can be activated and deactivated by Admin user.

To activate/deactivate Reward:

1. On the Admin sidebar, tap **Reward campaigns**. Then, choose **All reward campaigns**. You can also deactivate/activate reward from **Edit mode**
2. In the Reward campaign list, find the reward to be deactivated and click **Active** in the **Active** column. The button in the column change to **Inactive** and appear as a grey-out.

Active
INACTIVE
ACTIVE
ACTIVE
ACTIVE

Active Column

When you deactivate reward campaigns, customer will not be able to see it on the storefront and use.

3. To activate the reward click **Inactive** in the **Active** column. The button in the column change to **Active** and appears as a red.

Customer can use only Active reward campaigns

Conditions of reward availability to Customer:

1. Campaign must be **Active**.
2. Campaign must be **Visible** (if visibility is limited in time).
3. Customer is **assigned to Segment/Level** which are selected in Reward Campaign configuration.
4. There are available **coupon codes** (non used) for the campaign or campaign is not limited with single coupon code.
5. If there is option to **limit** coupon per campaign then reward is available when usage count is below limit.
6. If there is option to **limit** coupon per user then reward is available when usage count is below limit.