



LOYALTY

6 Steps to Menumate Loyalty

Introduction

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

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

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

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

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How to Use this Training Guide

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

Contents

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

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

Step 1 – Get Organised to Launch a Loyalty System

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Preparation

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

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

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

Will You Charge a Member to Join?

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

What Loyalty % Will You Offer Your Members?

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

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

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

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

Design a Membership Form

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

This ensures that;

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

Sample Membership Form

Join our Fan Club and Earn Loyalty Rewards



Name

Address

Cell Phone

Email

Birth Day

@

/

Day

Month

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

Design a Loyalty Card

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

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

Sample Loyalty Cards



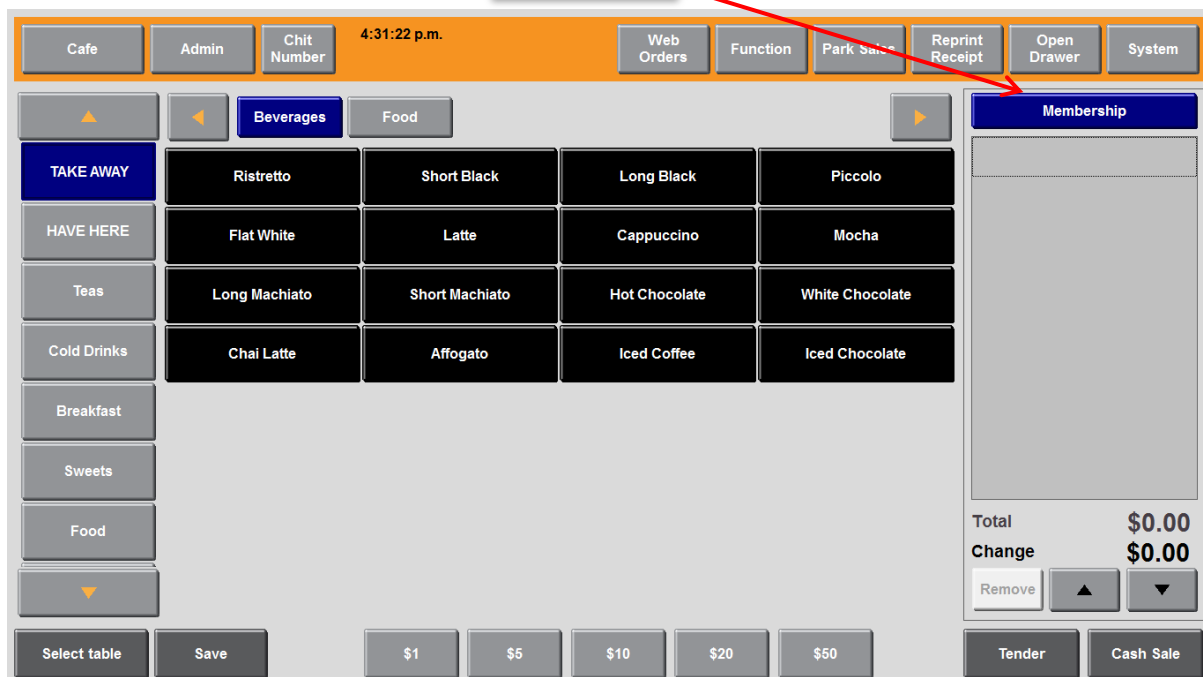
Step 2 – Building the Membership Database

Step 2 – Building the Membership Database

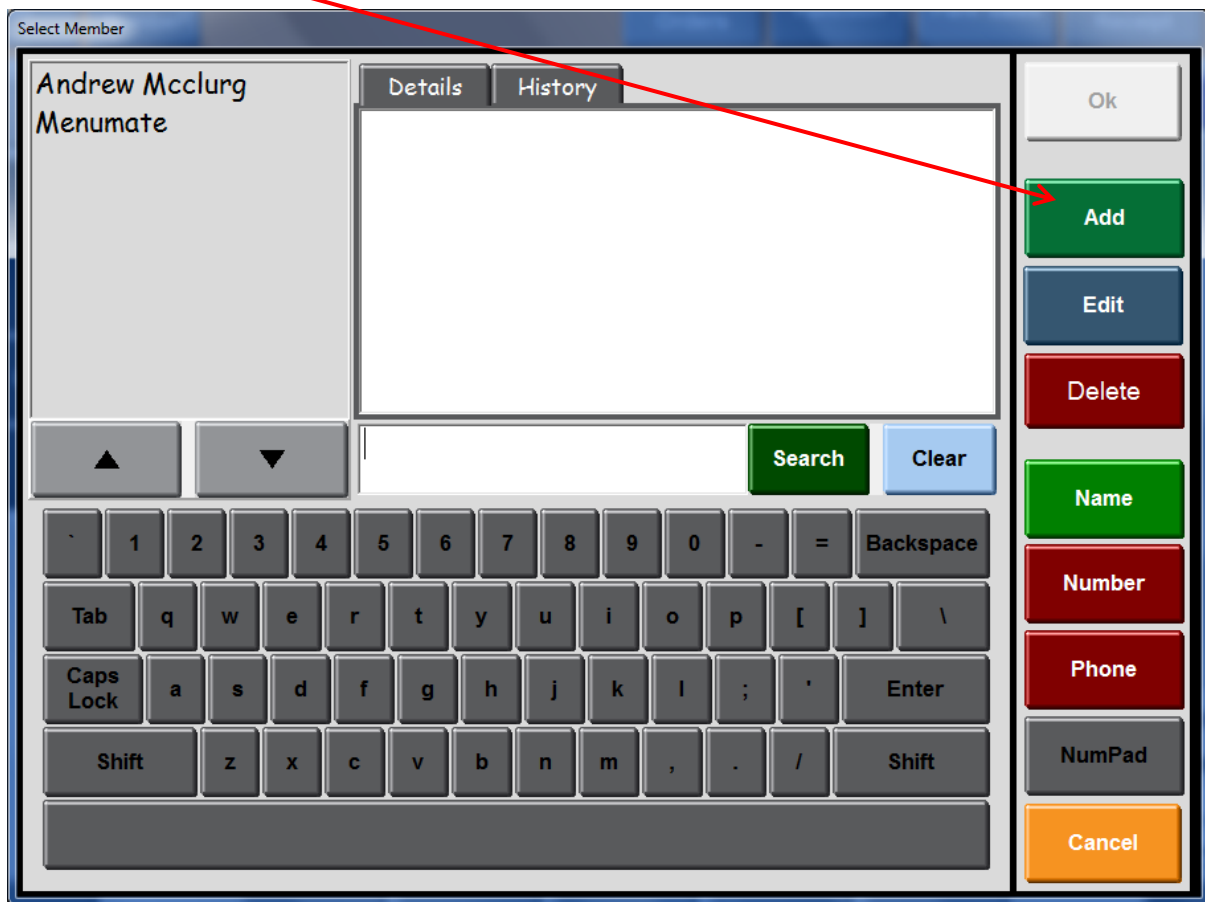
Entering Members into Menumate POS

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

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



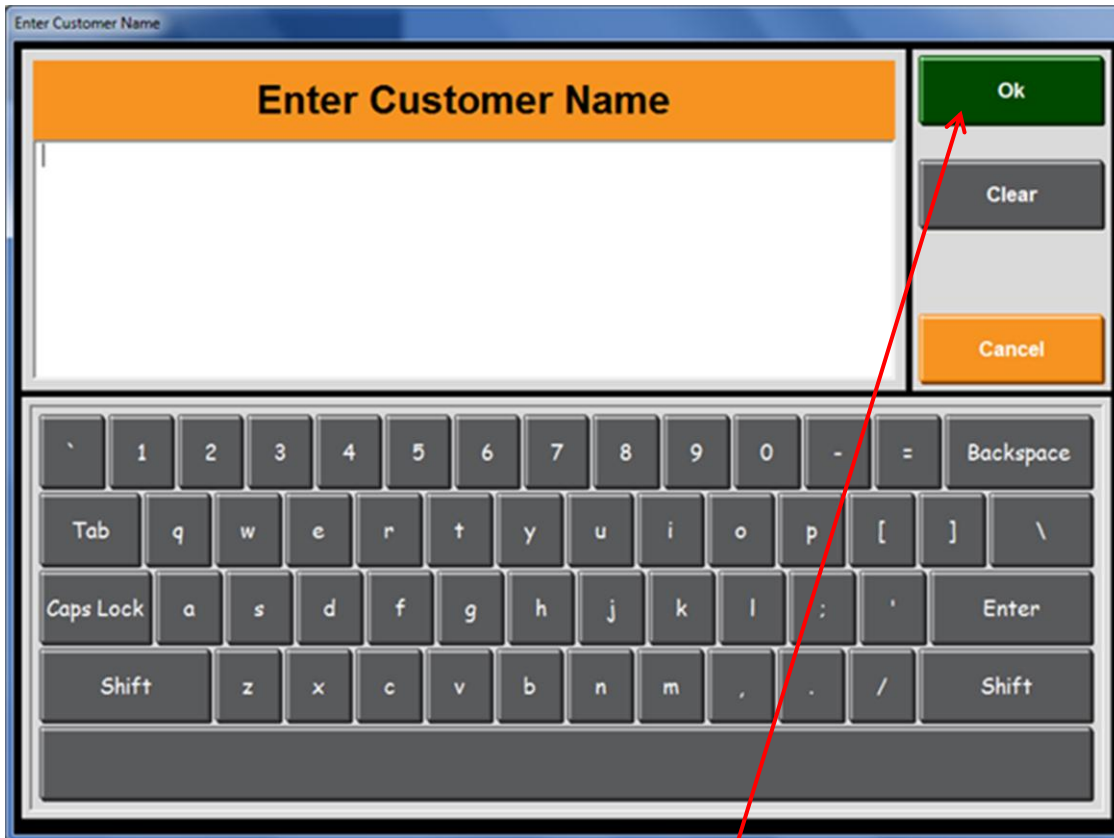
Press **Add** to create a new Member.



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

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

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



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

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

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

Date of Birth is Important!

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



Contact Details

Edit

Name Jason Smith

Known As

Member Number

Title

Sex

Contact Phone

Mobile 0212345678

E-Mail jsmith@xtra.com.nz

Location Address:

Mailing Address :

Displayed Note :

Smart Card Space Used 82 of 206

Date Of Birth

Day 18 Month 11 Year 1969

Clear Birthday **Set Birthday**

Points

Points Total : 0.00

Credit Details

Allowed Tab **Allowed Tab**

Card Details

Swipe Card(s) **Remove Card** **Clear All Cards**

Ok

User Profile

Discount Profile

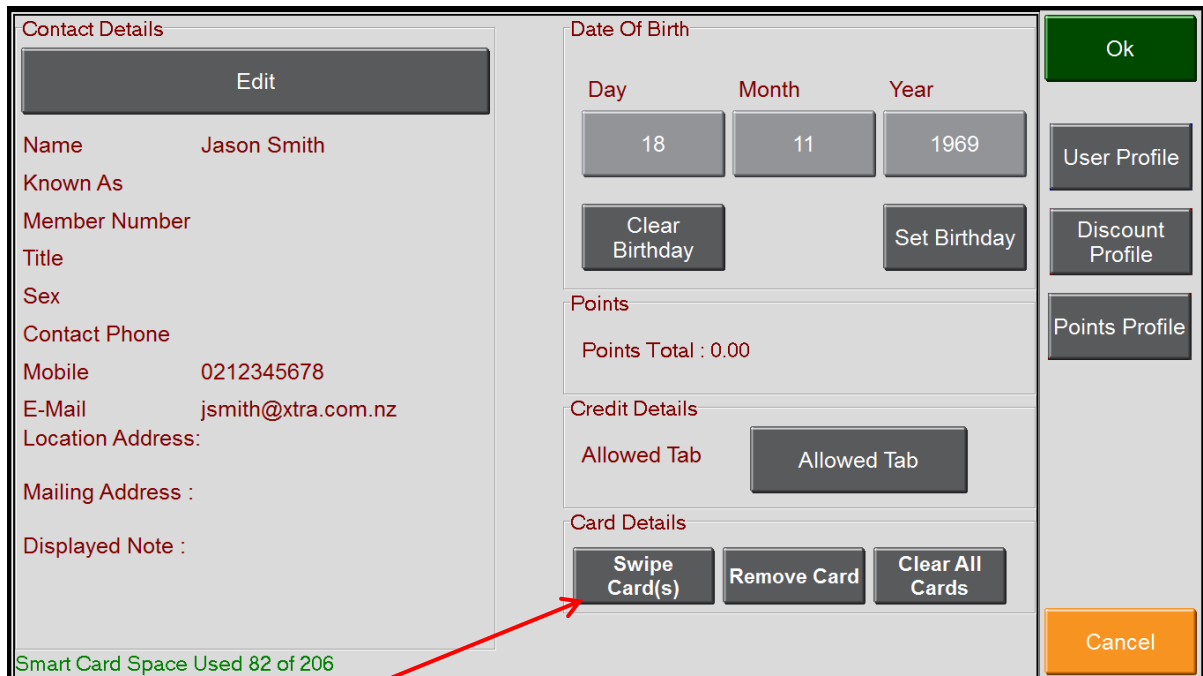
Points Profile

Cancel

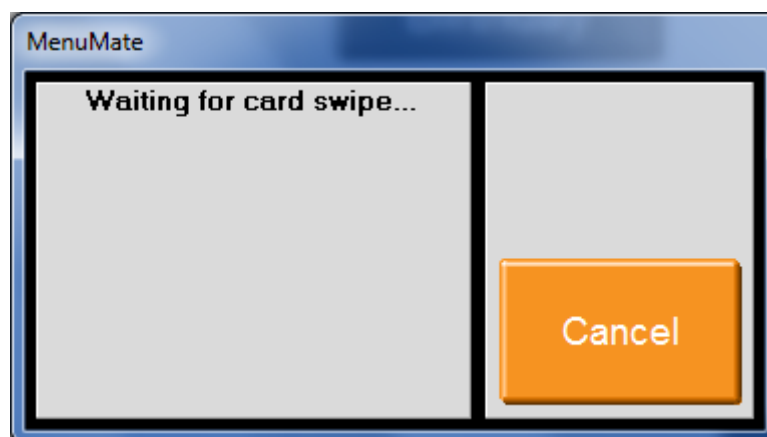
Enter the members DAY, MONTH and YEAR (if provided) for their birthday and then click on **Set Birthday**

Allocating a Loyalty Card

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



Click on **Swipe Card(s)** to bring up the Swipe Cards dialog box.

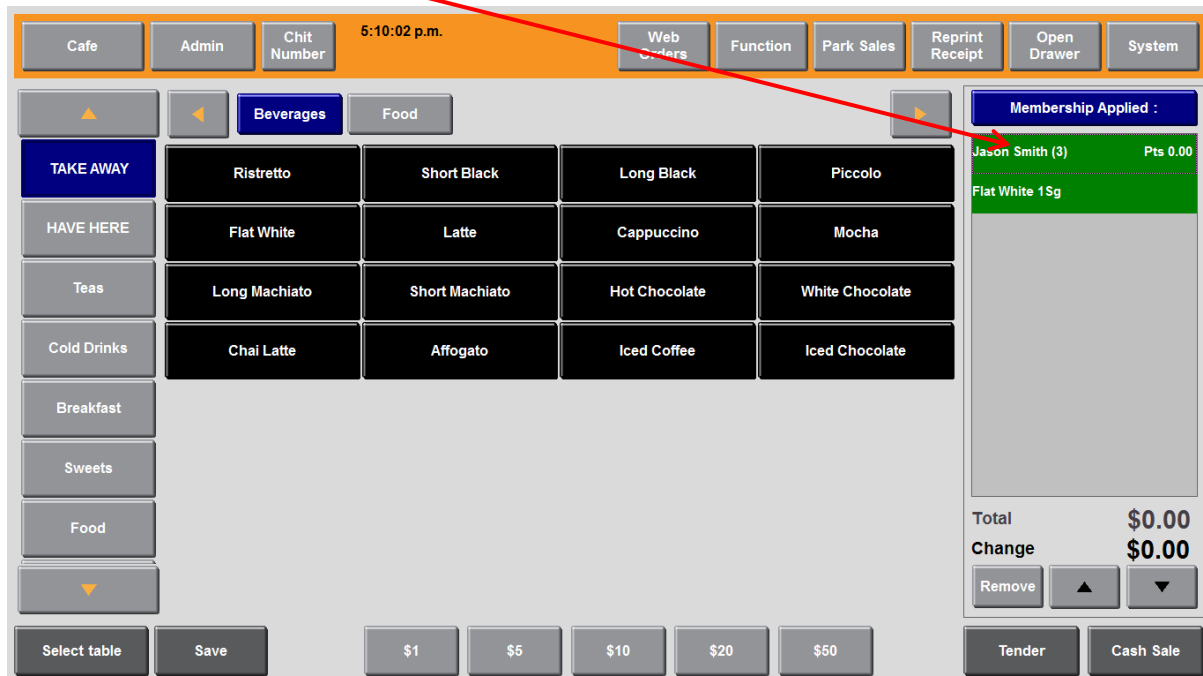


Once you swipe the membership card this dialog box will disappear and the card will be allocated to the Member.

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

Test for Success

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



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

Step 3 – Loyalty Rewards 101

Step 3 –Loyalty Rewards 101

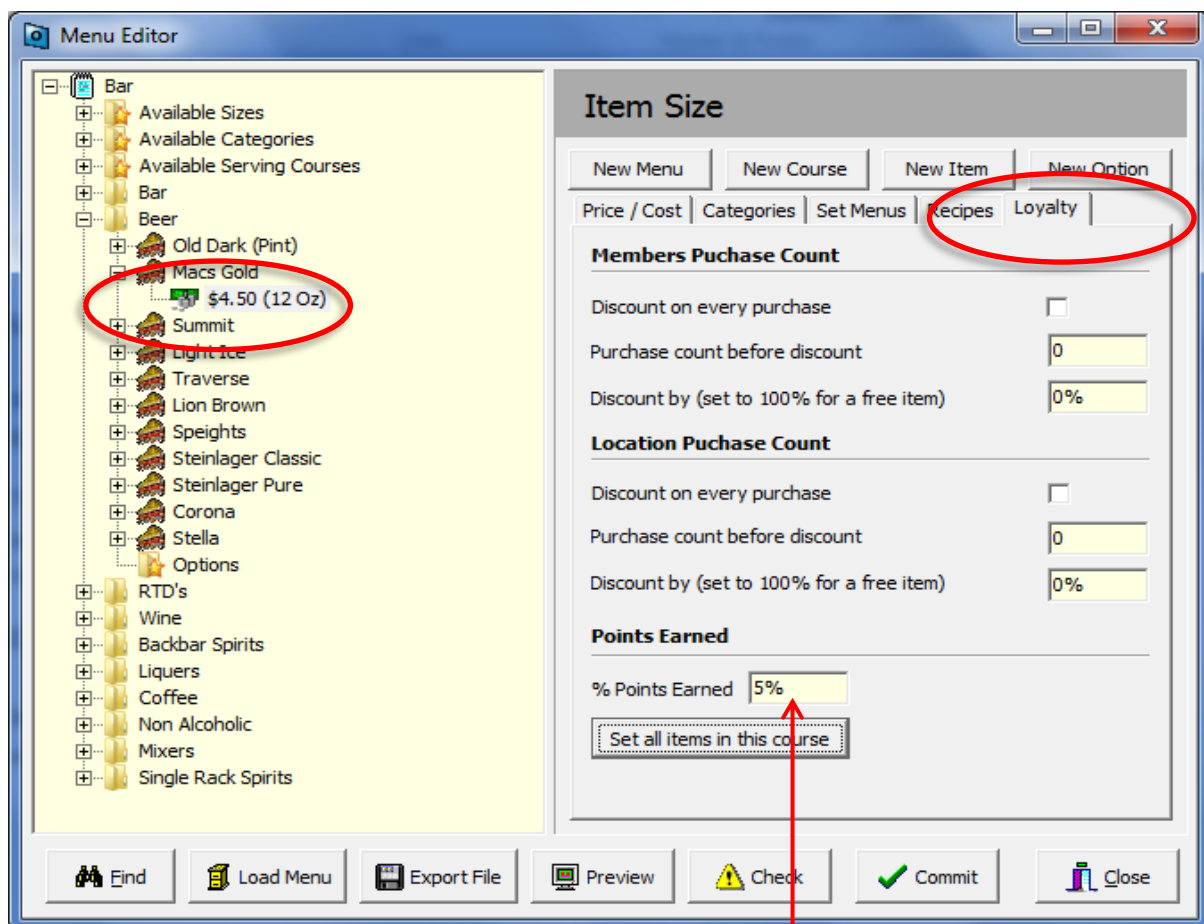
Loyalty Points

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

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

Configuring Loyalty Points in the Menu Editor

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



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

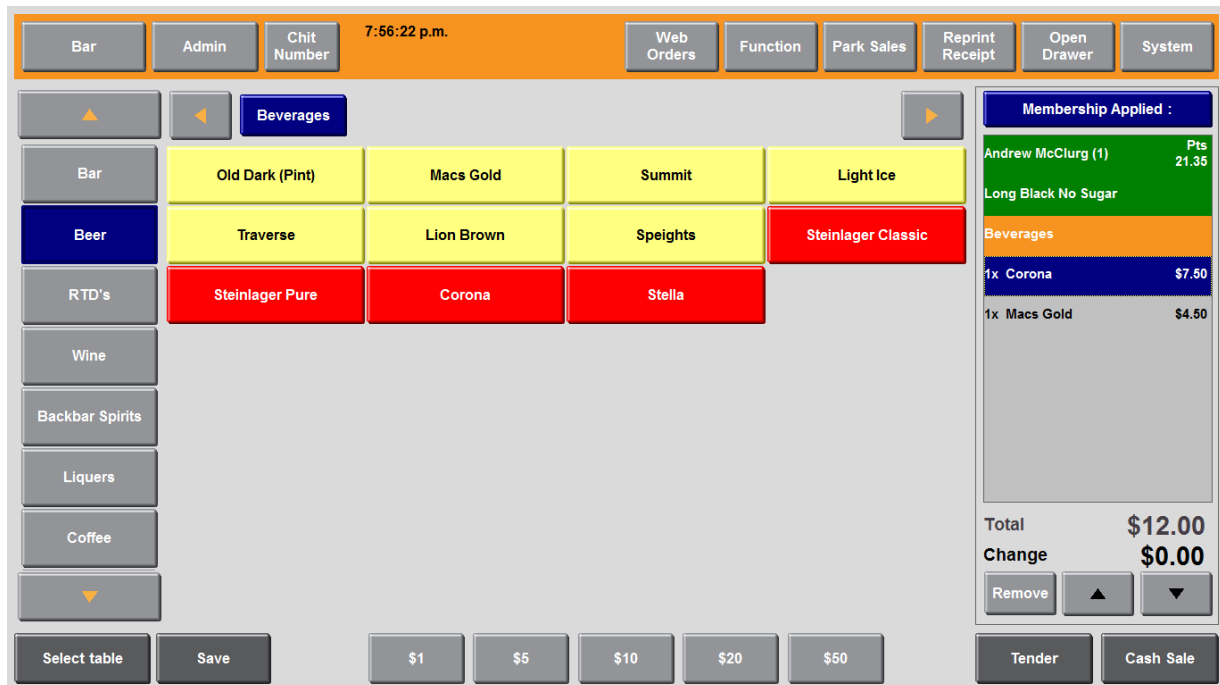
Set all items in this course

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

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

How Members EARN Loyalty Points at POS

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



The screenshot shows the Menumate POS interface. At the top, there's a navigation bar with buttons for Bar, Admin, Chit Number, Web Orders, Function, Park Sales, Reprint Receipt, Open Drawer, and System. The time 7:56:22 p.m. is displayed. Below the navigation bar, there's a main menu area with a 'Beverages' tab selected. The menu displays various beverage options: Old Dark (Pint), Macs Gold, Summit, Light Ice, Traverse, Lion Brown, Speights, Steinlager Classic, Steinlager Pure, Corona, and Stella. On the right side, there's a 'Membership Applied' section showing the member's name 'Andrew McClurg (1)' and their points balance 'Pts 21.35'. Below this, the order items are listed: '1x Corona' for \$7.50 and '1x Macs Gold' for \$4.50. The total amount is \$12.00, and the change is \$0.00. At the bottom, there are buttons for 'Select table', 'Save', and a row of buttons for dollar amounts: \$1, \$5, \$10, \$20, and \$50. There are also buttons for 'Tender' and 'Cash Sale'.

Touch Point #1

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

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

Select Receipt

ANDREWMCCLURG

Admin

20/06/2011 07:56 pm

ANDREWMCCLURG

Guest Count :1

Sale

1x 12 Oz Macs Gold

\$4.50

1x 330ml Corona

\$7.50

Sub Total

\$12.00

Total

\$12.00

Cash

\$12.00

Rounding

\$0.00

GST Contents

\$1.57

Membership

Andrew McClurg

Membership No.1

21.35

Current Points

0.60

Points Earned

21.95

Points New Total

Ok

Print

All Terminals

This Terminal

Select Day.

June 2011

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

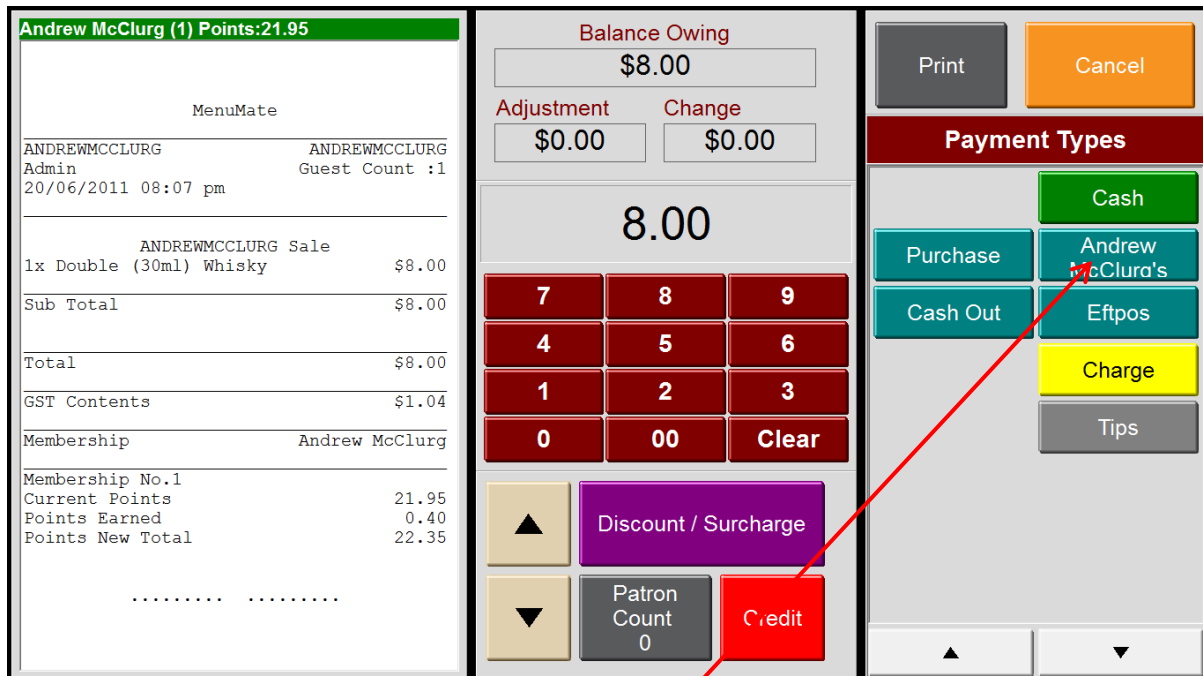
Today: 20/06/2011

Search

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

How Members SPEND Points at POS

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



Andrew McClurg (1) Points:21.95	
MenuMate	
ANDREWMCCLURG Admin	ANDREWMCCLURG Guest Count :1
20/06/2011 08:07 pm	
ANDREWMCCLURG Sale	
1x Double (30ml) Whisky	\$8.00
Sub Total	\$8.00
Total	\$8.00
GST Contents	\$1.04
Membership	Andrew McClurg
Membership No.1	21.95
Current Points	0.40
Points Earned	22.35
Points New Total	

Balance Owing	
\$8.00	
Adjustment	Change
\$0.00	\$0.00
8.00	
7	8
4	5
1	2
0	00
Clear	
Discount / Surcharge	
Patron Count 0	
Credit	

Payment Types	
Cash	Andrew McClurg's
Purchase	Eftpos
Cash Out	Charge
Tips	

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

Touch Point #2

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

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

Select Receipt

ANDREWMCCLURG

Admin

20/06/2011 08:08 pm

ANDREWMCCLURG

Guest Count :1

ANDREWMCCLURG Sale

1x Double (30ml) Whisky

Sub Total

Total

Andrew McClurg's Points

Rounding

GST Contents

Membership

Membership No.1

Current Points

Points Redeemed

Points New Total

.....

8.00

8.00

8.00

8.00

8.00

1.04

Andrew McClurg

21.95

8.00

13.95

Ok

Print

All Terminals

This Terminal

Select Day.

June 2011

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Today: 20/06/2011

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⌘

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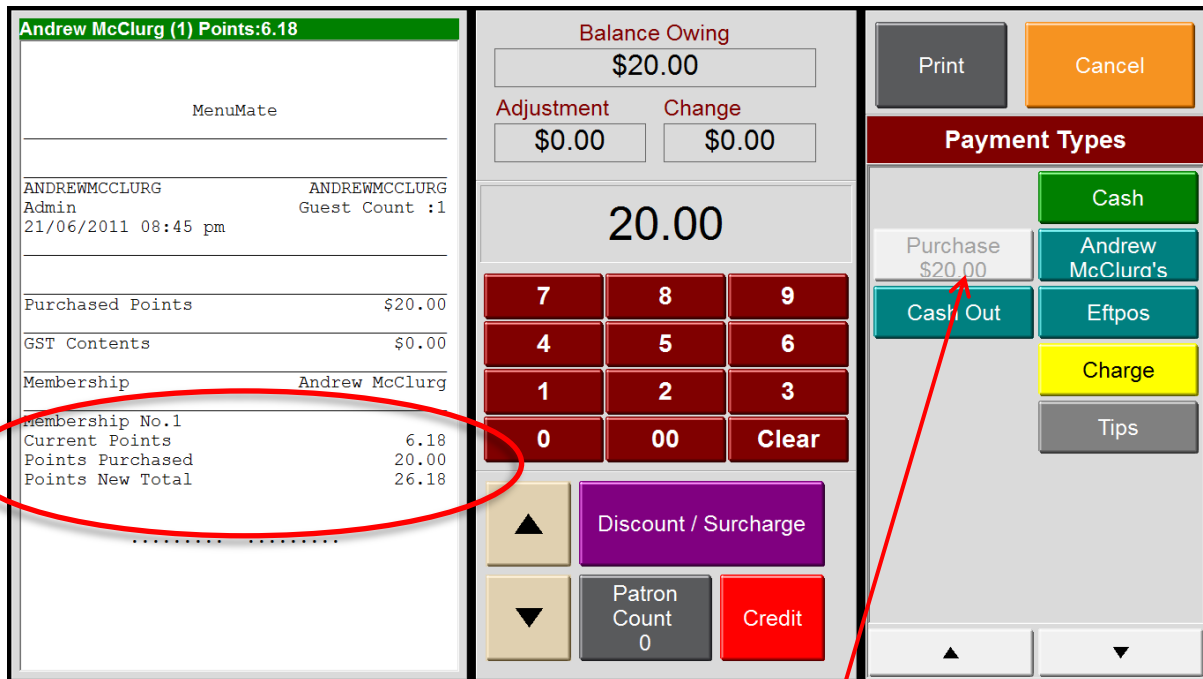
Search

In the above example the member purchased 1 * Double Whisky for \$8.00 and they used their points to pay for the purchase. The member's points started with 21.95, they spent 8.00 and they now have 13.95.

Note: If the item had also had loyalty points to earn (e.g. 5%) then the balance would have reduced by 8.00 and increased by .40 as members do earn loyalty rewards while spending them.

Members should be Encouraged to Top Up their Balance

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



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

Item	Amount
Membership No.1	6.18
Current Points	6.18
Points Purchased	20.00
Points New Total	26.18

The 'Points New Total' row is circled in red. In the center, the 'Balance Owing' is \$20.00, and the 'Change' is \$0.00. A numeric keypad is visible with the number 20.00 entered. On the right, the 'Payment Types' section shows options like Cash, Andrew McClurg's, Eftpos, Charge, and Tips. A red arrow points from the 'Purchase \$20.00' button to the 'Tender' button in the top right corner.

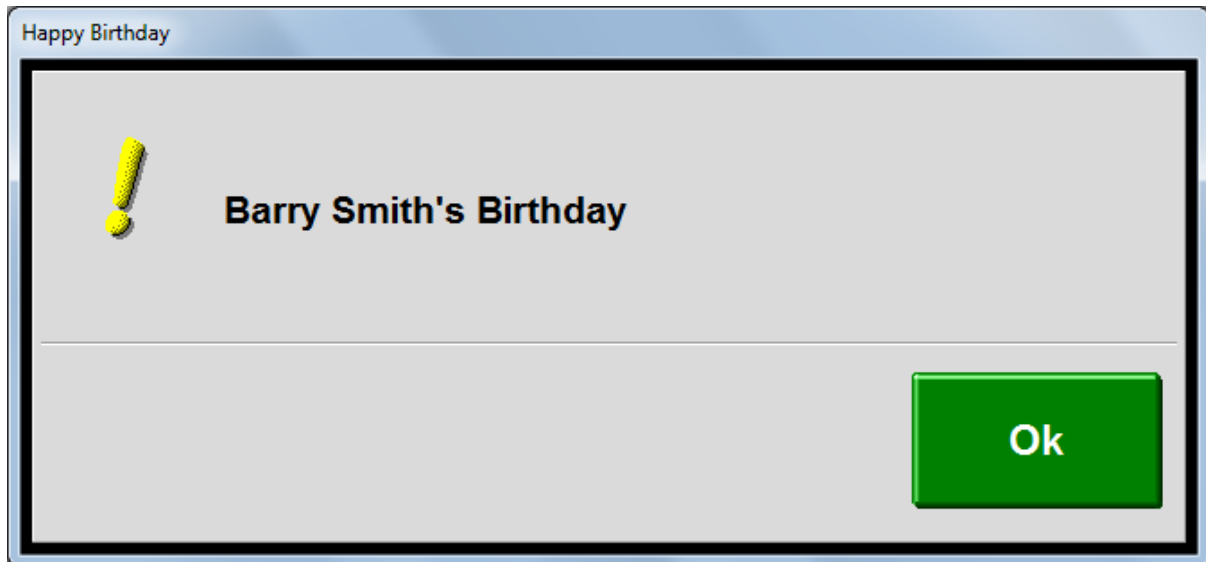
Enter the amount the member wants to top up and press the **Purchase** button next to the member's name, then select the payment type that relates to how the customer is purchasing the additional loyalty rewards, e.g. Cash, EFTPOS.

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

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

Congratulations It Is Your Birthday

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

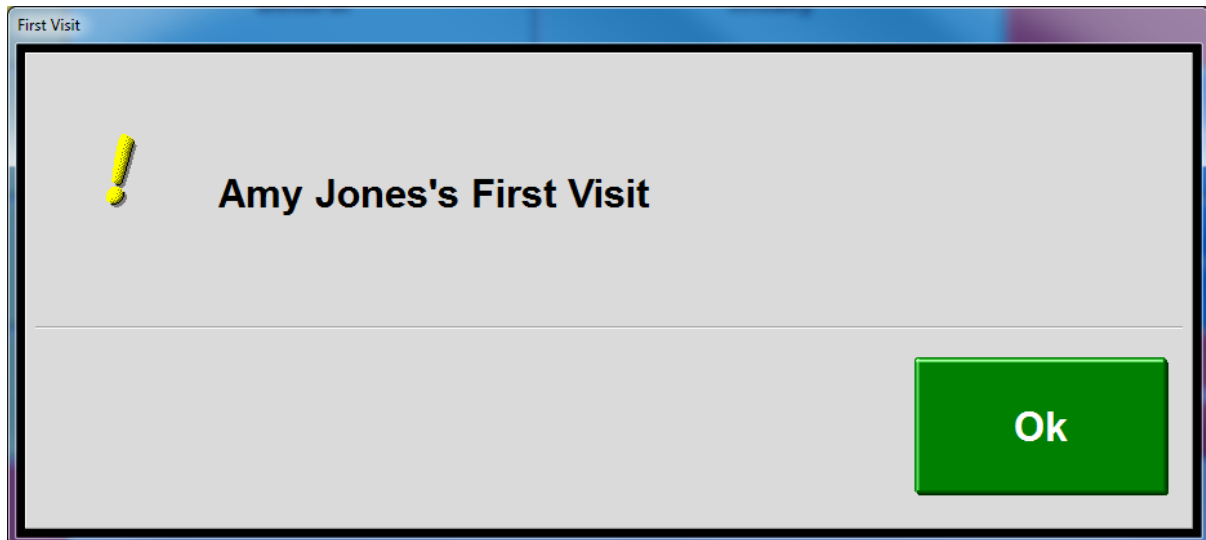


Touch Point #3

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

Thank You for Visiting Us

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

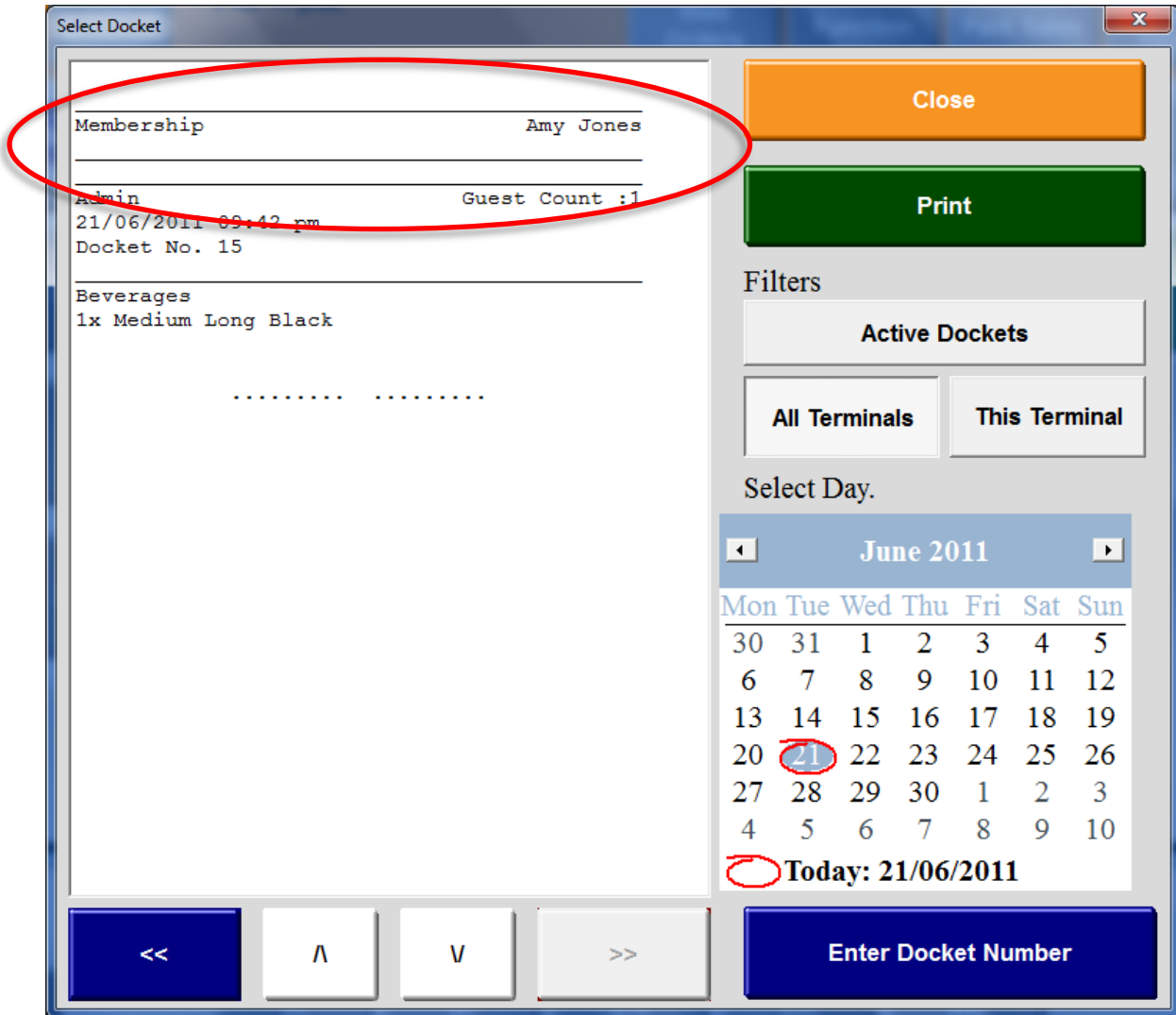


Touch Point #4

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

Give Your Staff all the Information Needed

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



Select Docket

Membership Amy Jones

Admin Guest Count :1

21/06/2011 09:42 pm

Docket No. 15

Beverages

1x Medium Long Black

.....

Close

Print

Filters

Active Dockets

All Terminals This Terminal

Select Day.

June 2011

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Today: 21/06/2011

<< ^ v >>

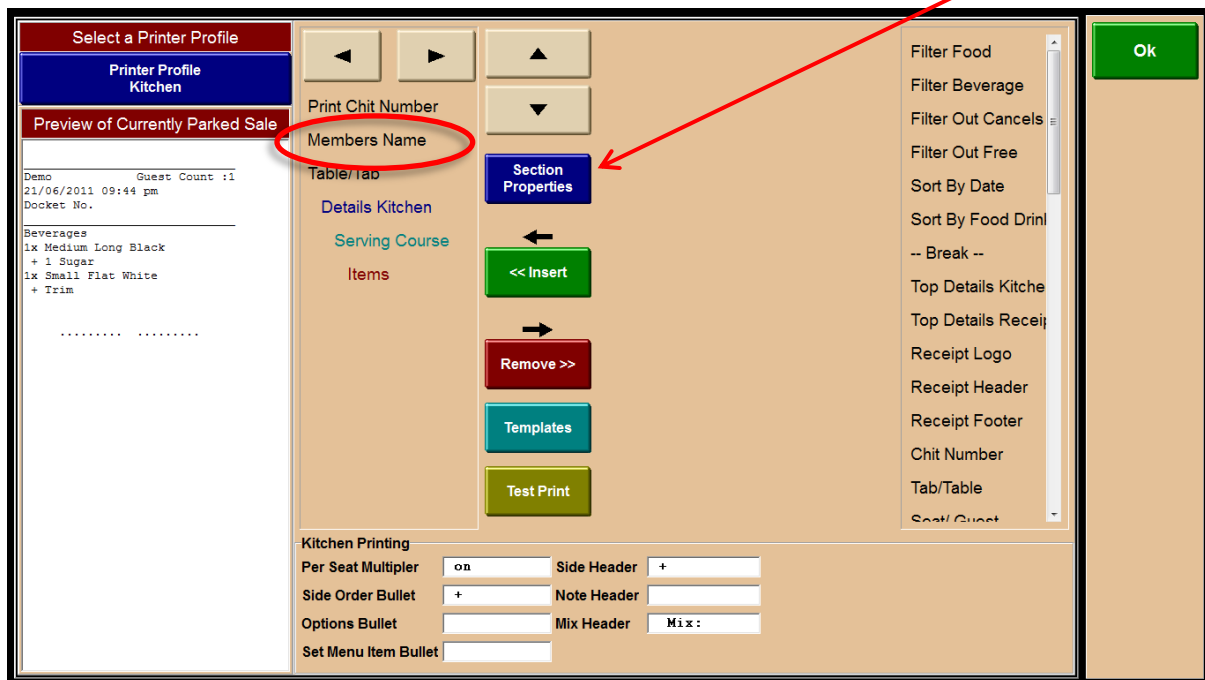
Enter Docket Number

Touch Point #5

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

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

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

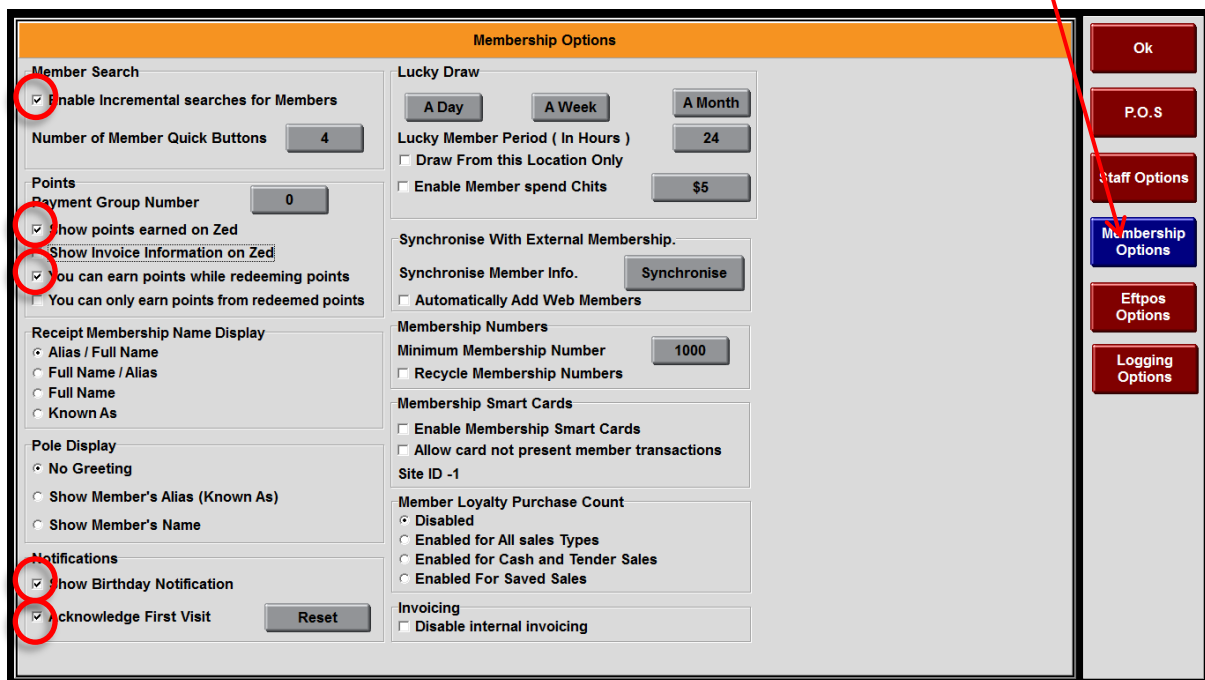


The screenshot shows the Menumate software interface. On the left, there is a sidebar with buttons: 'Select a Printer Profile', 'Printer Profile Kitchen', and 'Preview of Currently Parked Sale'. The 'Preview of Currently Parked Sale' button is selected, showing a preview of a sale with details like 'Demo', 'Guest Count :1', '21/06/2011 09:44 pm', 'Docket No.', and a list of beverages. In the center, there is a 'Section Properties' dialog box. The 'Members Name' field is highlighted with a red circle. Below it, there are buttons for 'Details Kitchen', 'Serving Course', and 'Items'. To the right of the 'Members Name' field, there are buttons for 'Section Properties', '<< Insert', 'Remove >>', 'Templates', and 'Test Print'. On the far right, there is a list of filters: 'Filter Food', 'Filter Beverage', 'Filter Out Cancels', 'Filter Out Free', 'Sort By Date', 'Sort By Food Drink', '-- Break --', 'Top Details Kitchen', 'Top Details Receipt', 'Receipt Logo', 'Receipt Header', 'Receipt Footer', 'Chit Number', 'Tab/Table', and 'Seat/Guest'. At the bottom right, there is a green 'Ok' button. At the bottom left, there is a 'Kitchen Printing' section with fields for 'Per Seat Multiplier', 'Side Header', 'Side Order Bullet', 'Note Header', 'Options Bullet', 'Mix Header', and 'Set Menu Item Bullet'.

Check the Settings for Loyalty Rewards 101

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

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



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

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

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

OK

Step 4 –Loyalty Rewards 201

Step 4 – Loyalty Rewards 201

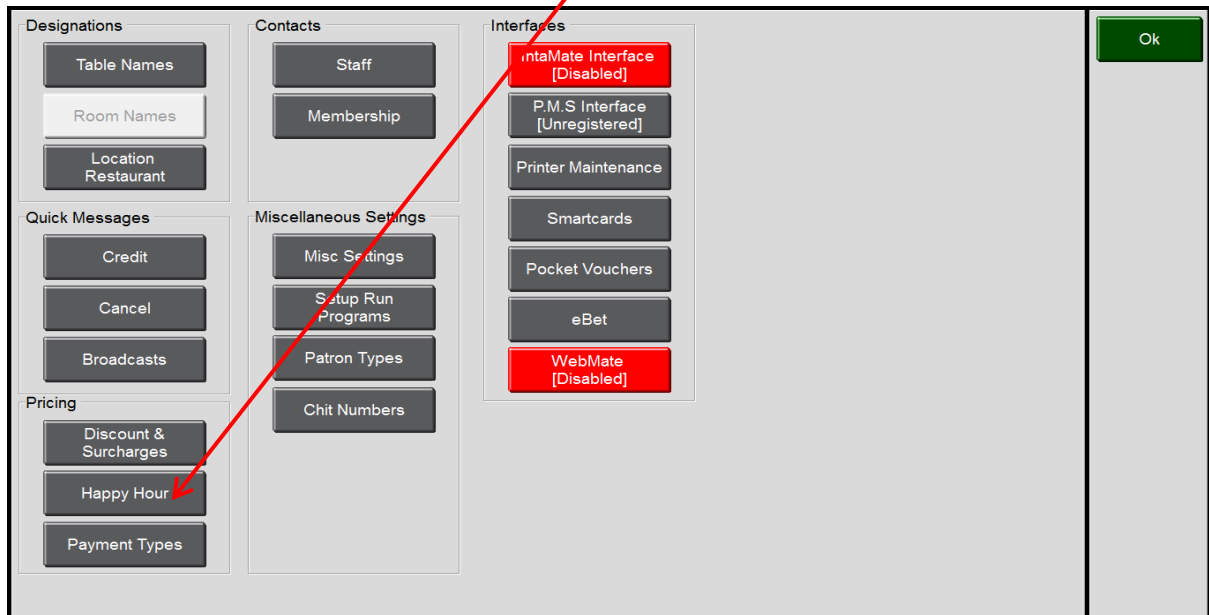
There are many features in Menumate that you can use to turbo boost your loyalty system. Menumate is continuing to add to these features. Step 4 will cover the following turbo boosts that you can implement some or all of in your own system

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

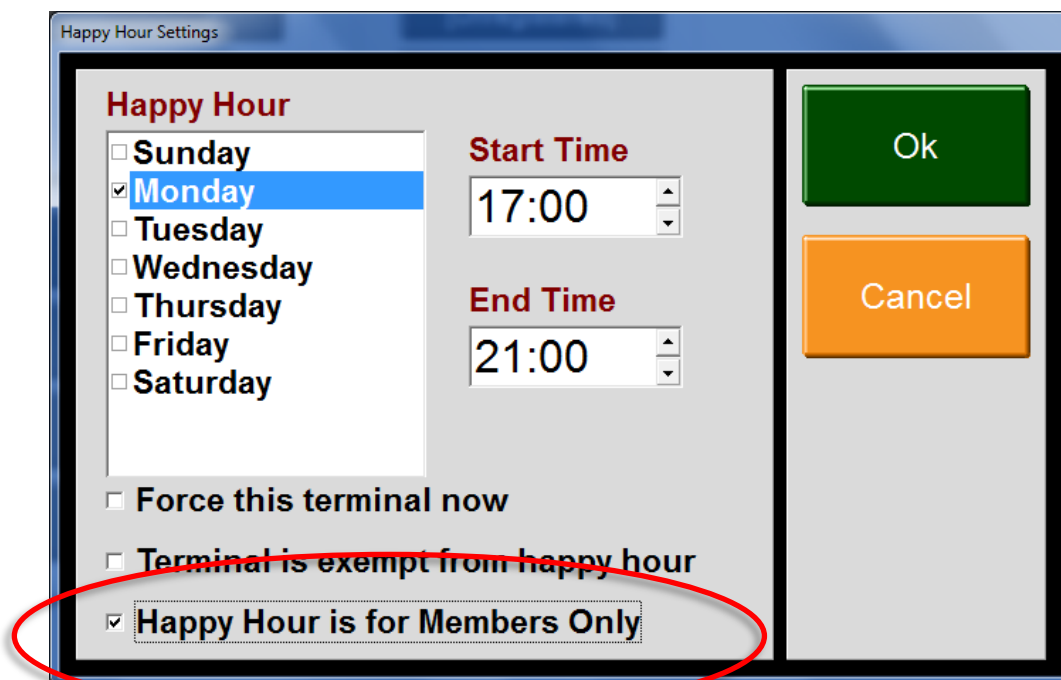
Members Only Happy Hours

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

Happy Hour

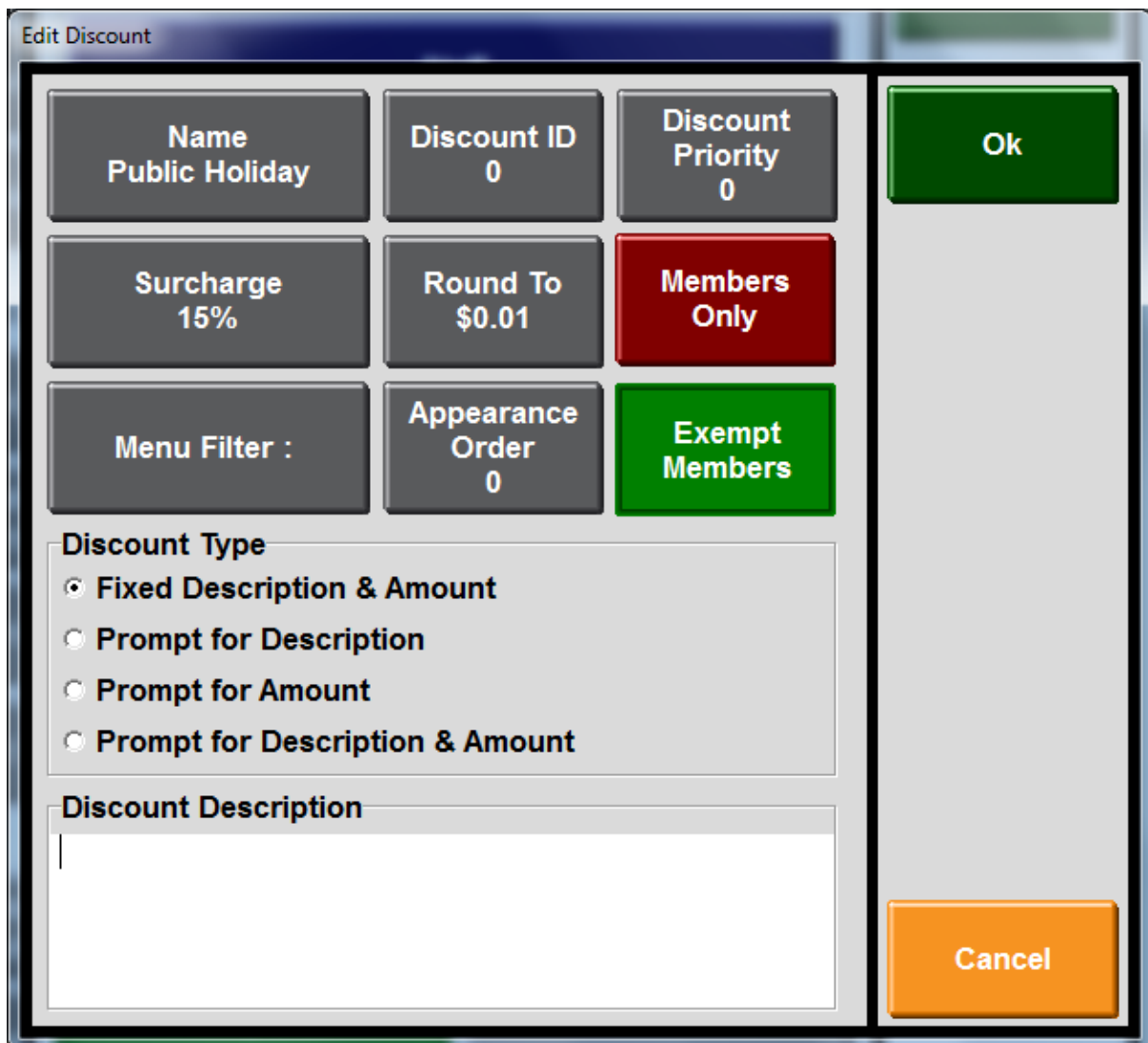


Determine the day, start time and end time of the happy hour and then tick the box Happy Hour is for Members Only. Using this setting the happy hour (special pricing) will only be used if a member swipes their loyalty card during the sale.



Exclude Members from Holiday Surcharges

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



Edit Discount

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

Discount Type

- ☒ Fixed Description & Amount
- ☐ Prompt for Description
- ☐ Prompt for Amount
- ☐ Prompt for Description & Amount

Discount Description

Ok

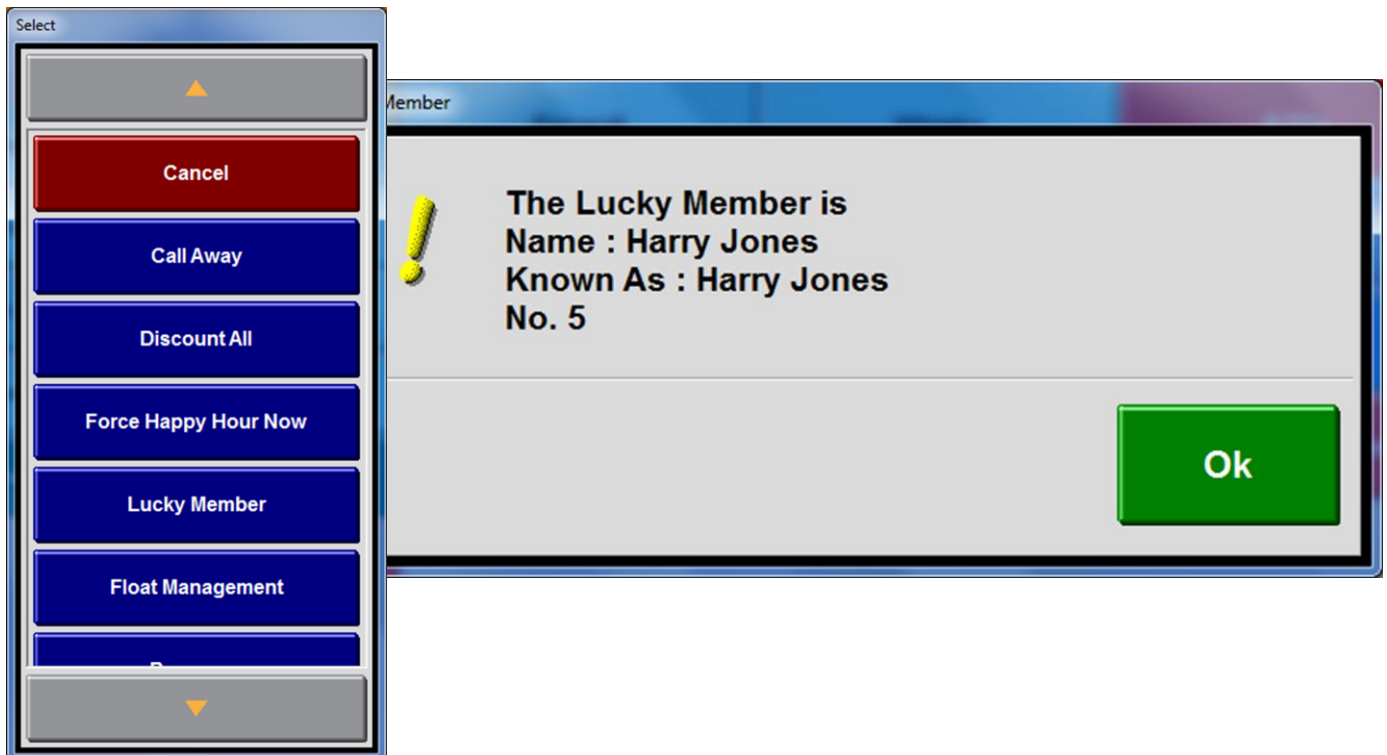
Cancel

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

Lucky Member Draws

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

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

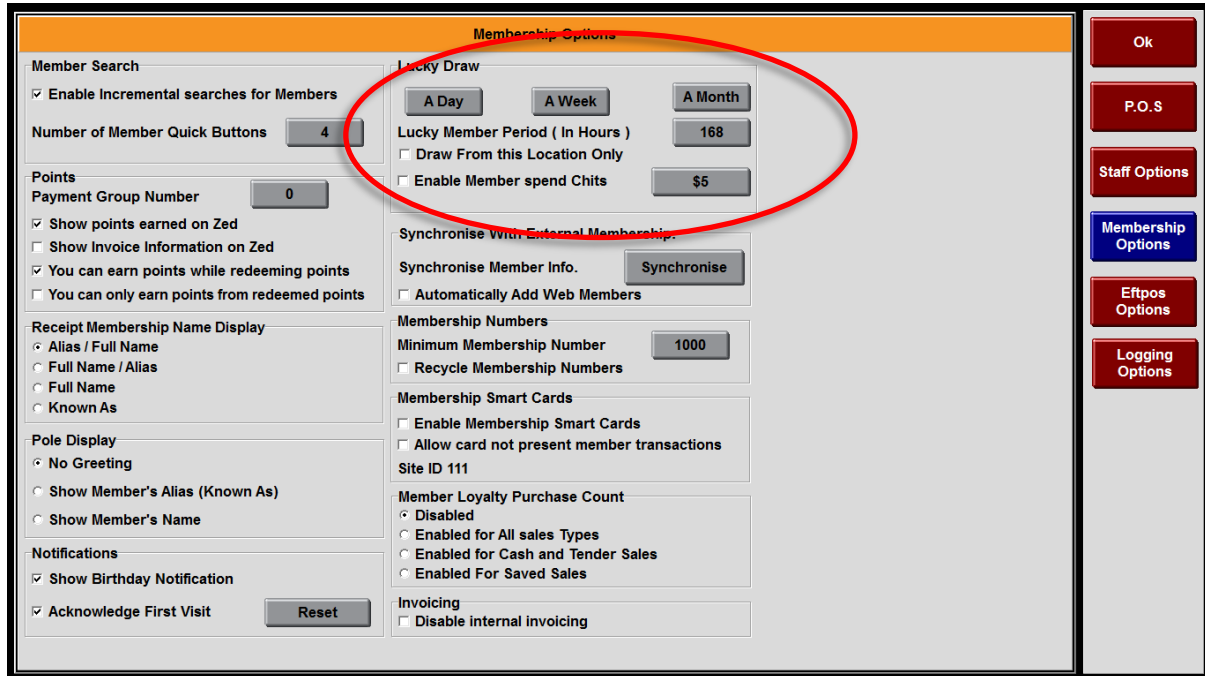


Touch Point #6

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

Lucky Member Draw Settings

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



The screenshot shows the 'Membership Options' window. The 'Lucky Draw' section is highlighted with a red circle. It includes the following settings:

- Lucky Draw**
 - ☐ A Day
 - ☐ A Week
 - ☐ A Month
 - Lucky Member Period (In Hours) : 168
 - ☐ Draw From this Location Only
 - ☐ Enable Member spend Chits : \$5
- Synchronise With External Membership**
 - Synchronise Member Info. :
 - ☐ Automatically Add Web Members
- Membership Numbers**
 - Minimum Membership Number : 1000
 - ☐ Recycle Membership Numbers
- Membership Smart Cards**
 - ☐ Enable Membership Smart Cards
 - ☐ Allow card not present member transactions
- Site ID** : 111
- Member Loyalty Purchase Count**
 - ☐ Disabled
 - ☐ Enabled for All sales Types
 - ☐ Enabled for Cash and Tender Sales
 - ☐ Enabled For Saved Sales
- Invoicing**
 - ☐ Disable internal invoicing

Other visible settings include 'Member Search', 'Points', 'Receipt Membership Name Display', 'Pole Display', and 'Notifications'.

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

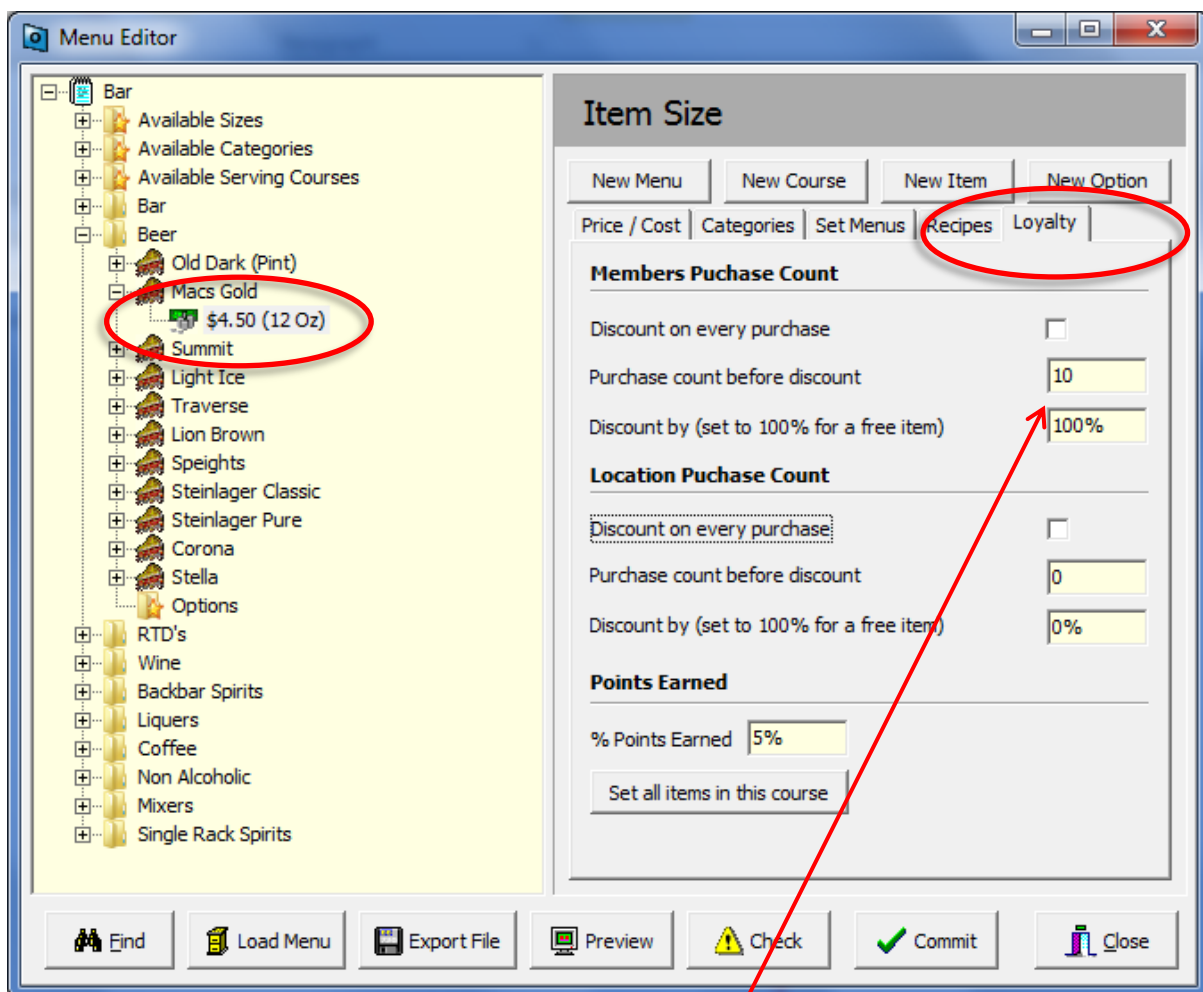
You can also limit purchases to just the one location is you have multiple sales areas and only want members how have made a purchase in the one area to be entered into the draw. E.g., Only in the Bar and not in the Bottle Store.

10th Product Free (Per Member)

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

Configuring Free Product in the Menu Editor (Per Member)

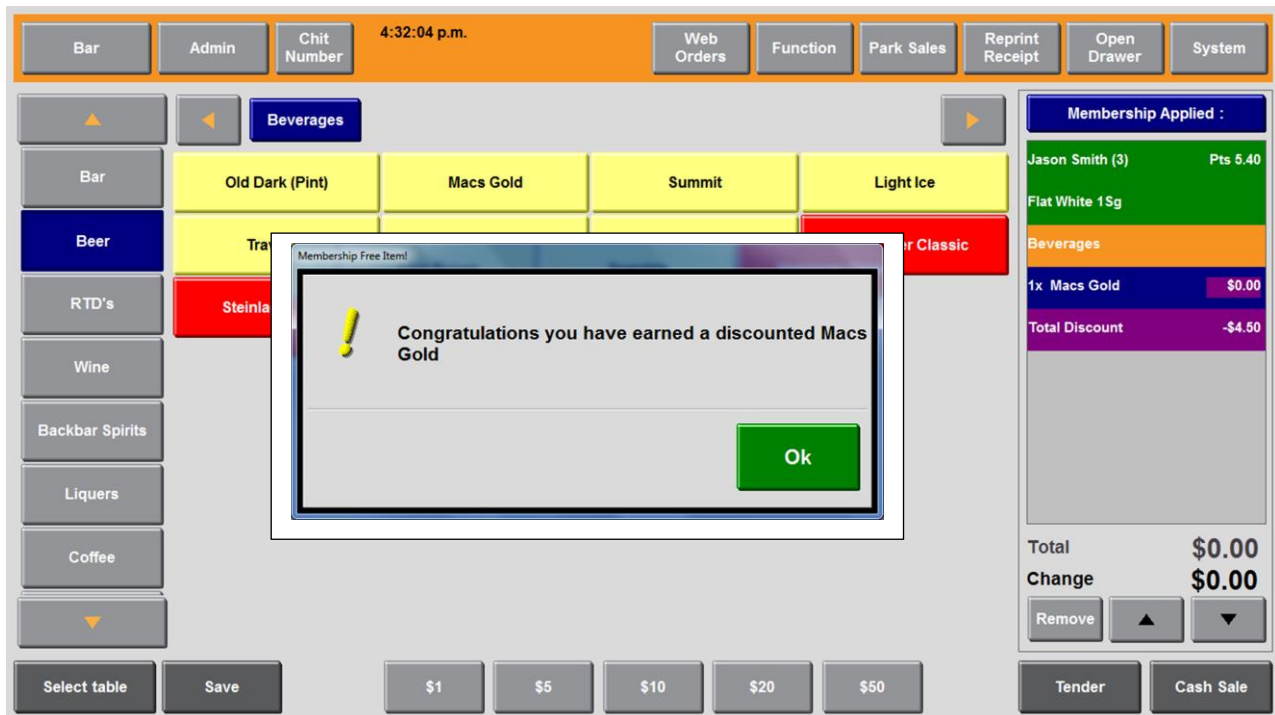
When you are in the Menu Editor in Menumate Office you can configure each item to determine the number they need to purchase and the discounted percentage.



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

Touch Point #7

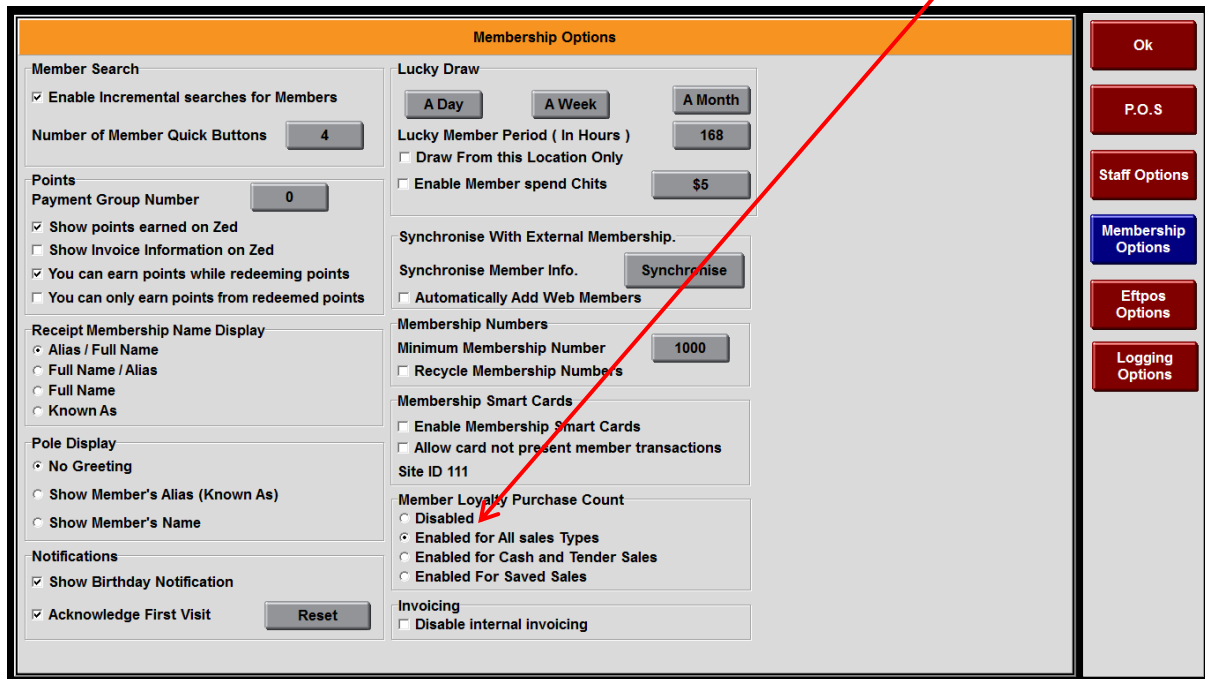
Nothing is happier to be received than something that is a surprise. Especially when it is free! While some member's will keep their own count as to how many items they have purchased the majority of them will receive the free or discount item gratefully. It is a useful tool to continue to build that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



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

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

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



The screenshot shows the 'Membership Options' configuration window. A red arrow points to the 'Member Loyalty Purchase Count' section, which is currently set to 'Disabled'. The window includes various settings for member search, points, lucky draw, and membership numbers.

Membership Options

Member Search

- ☒ Enable Incremental searches for Members
- Number of Member Quick Buttons: 4

Points

Payment Group Number: 0

- ☒ Show points earned on Zed
- ☐ Show Invoice Information on Zed
- ☒ You can earn points while redeeming points
- ☐ You can only earn points from redeemed points

Receipt Membership Name Display

- ☐ Alias / Full Name
- ☐ Full Name / Alias
- ☐ Full Name
- ☐ Known As

Pole Display

- ☐ No Greeting
- ☐ Show Member's Alias (Known As)
- ☐ Show Member's Name

Notifications

- ☒ Show Birthday Notification
- ☒ Acknowledge First Visit

Lucky Draw

A Day A Week A Month

Lucky Member Period (In Hours) 168

- ☐ Draw From this Location Only
- ☐ Enable Member spend Chits \$5

Synchronise With External Membership.

Synchronise Member Info. Synchronise

- ☐ Automatically Add Web Members

Membership Numbers

Minimum Membership Number 1000

- ☐ Recycle Membership Numbers

Membership Smart Cards

- ☐ Enable Membership Smart Cards
- ☐ Allow card not present member transactions

Site ID 111

Member Loyalty Purchase Count

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

Invoicing

- ☐ Disable internal invoicing

Buttons: Ok, P.O.S, Staff Options, Membership Options, Eftpos Options, Logging Options

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

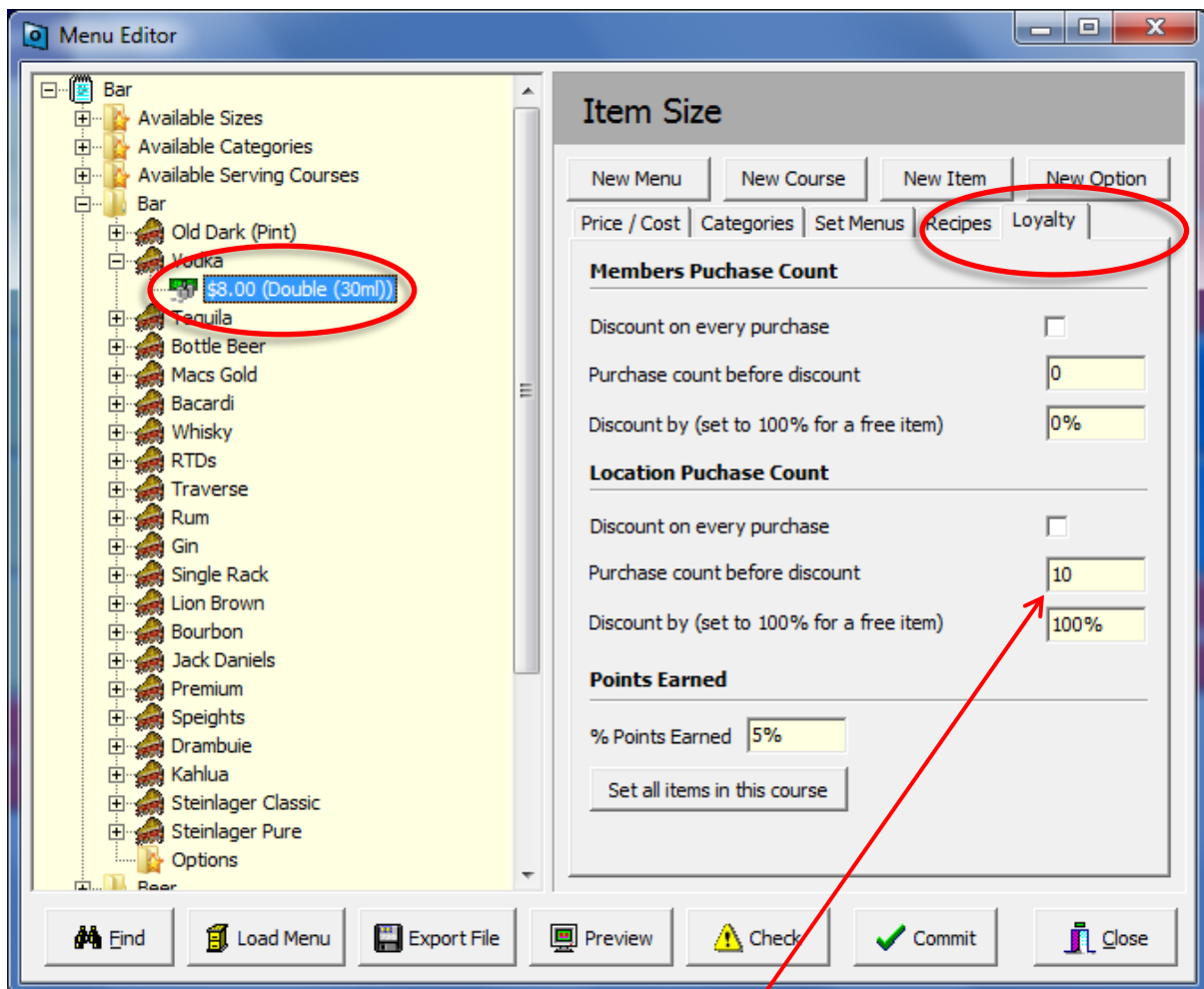
If this is not ticked then no count will be kept for any products.

10th Product Free (All Sales)

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

Configuring Free Product in the Menu Editor (All Sales)

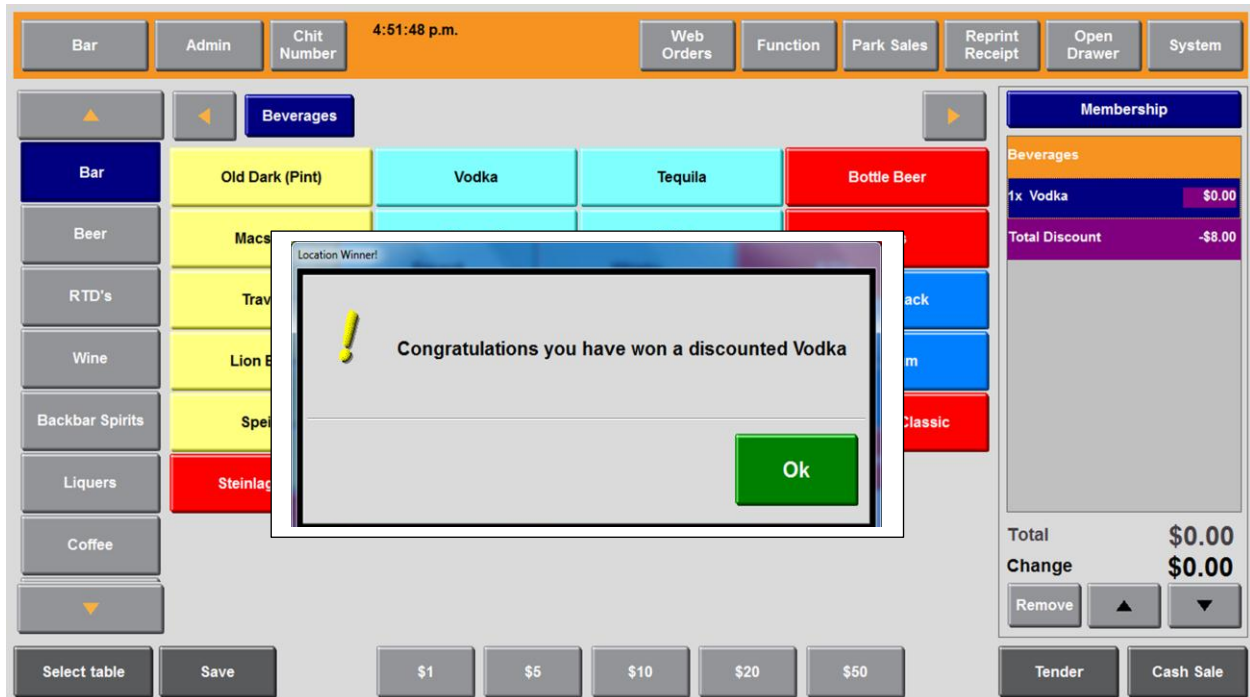
When you are in the Menu Editor in Menumate Office you can configure each item to determine the number they need to purchase and the discounted percentage.



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

Touch Point #8

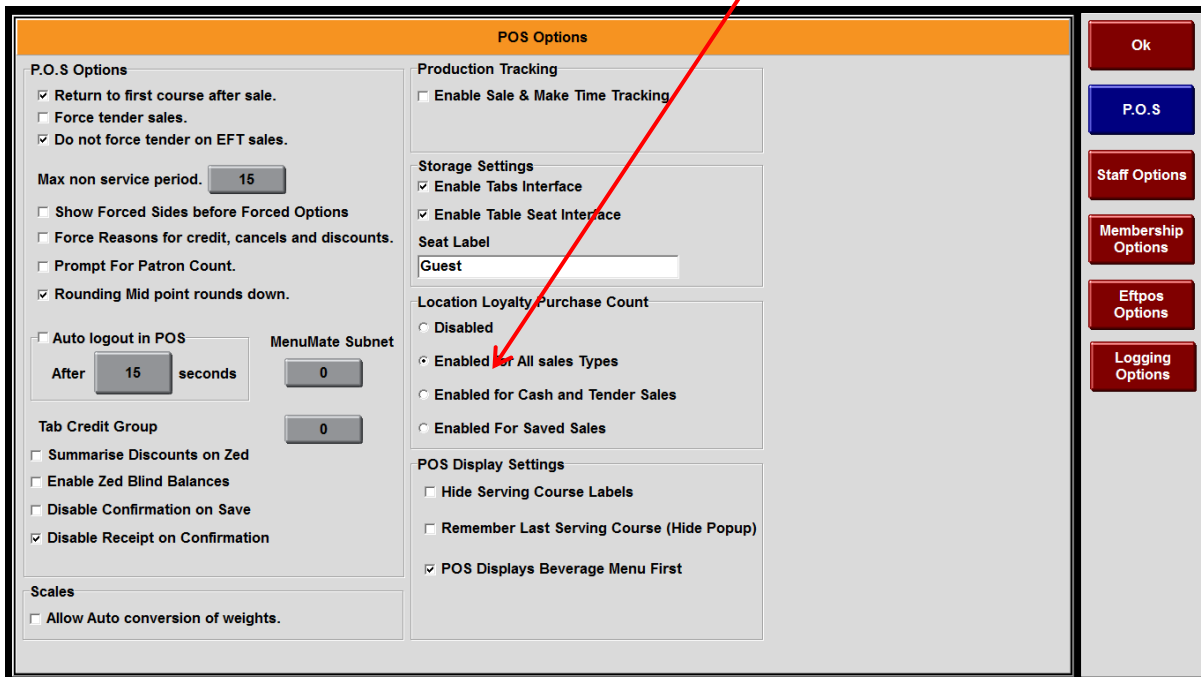
While this is not directly linked to the loyalty system it is a very good way to interact with your customers. A customer may come up to the bar and buy a drink that they have never purchased before and just because it is the 10th time that was purchased then they will get it free. Not many customers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



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

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

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



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

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

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

Important Not on Free Product Counts

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

Step 5 – Not All Members are Created Equal

Step 5 – Not All Members are Created Equal

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

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

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

Gold Membership Discount

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

From the members maintenance screen select

Discount Profile



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



Personalising How Loyalty Points Work for Individual Members

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

From the members maintenance screen select

Points Profile



Each option when select will turn green.

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

Step 6 – Communication to Your Fans

Step 6 – Communication to Your Fans

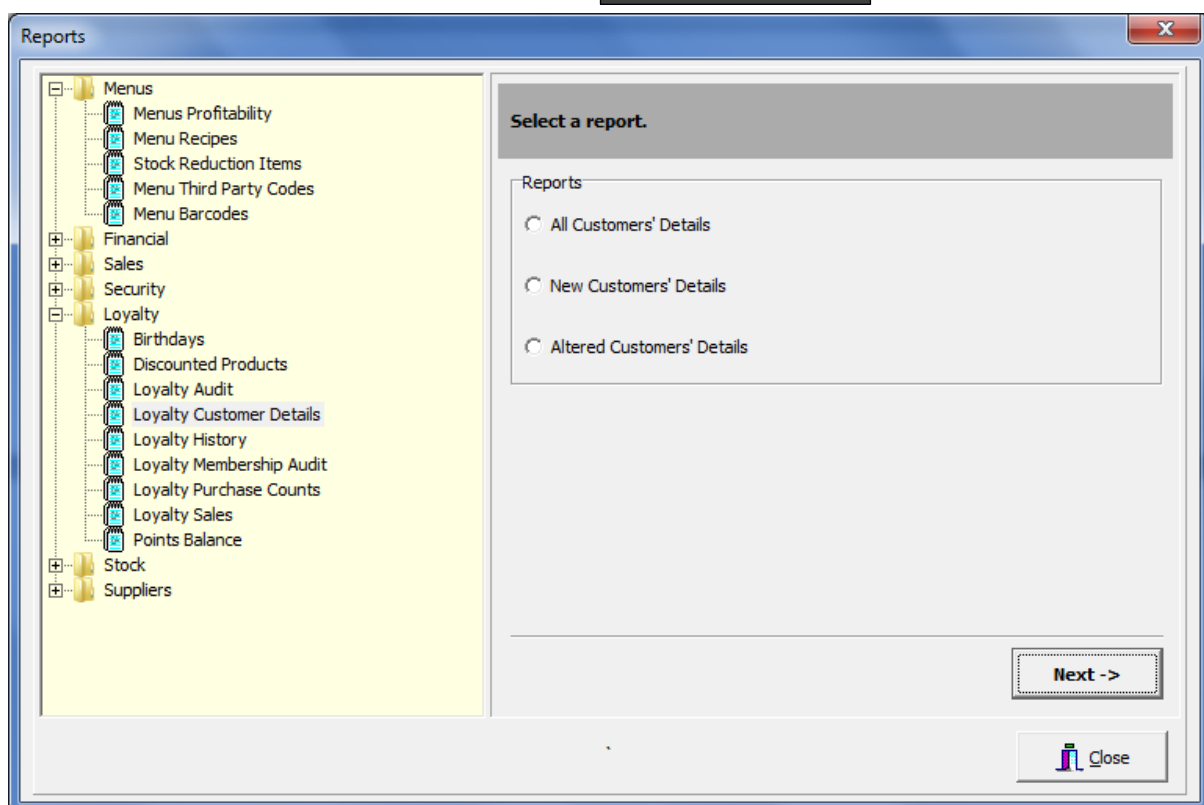
Menumate office allows you to export out information to communicate to your fans via email, txt, post etc.

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

Exporting Member Details to Excel

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

Export to Excel



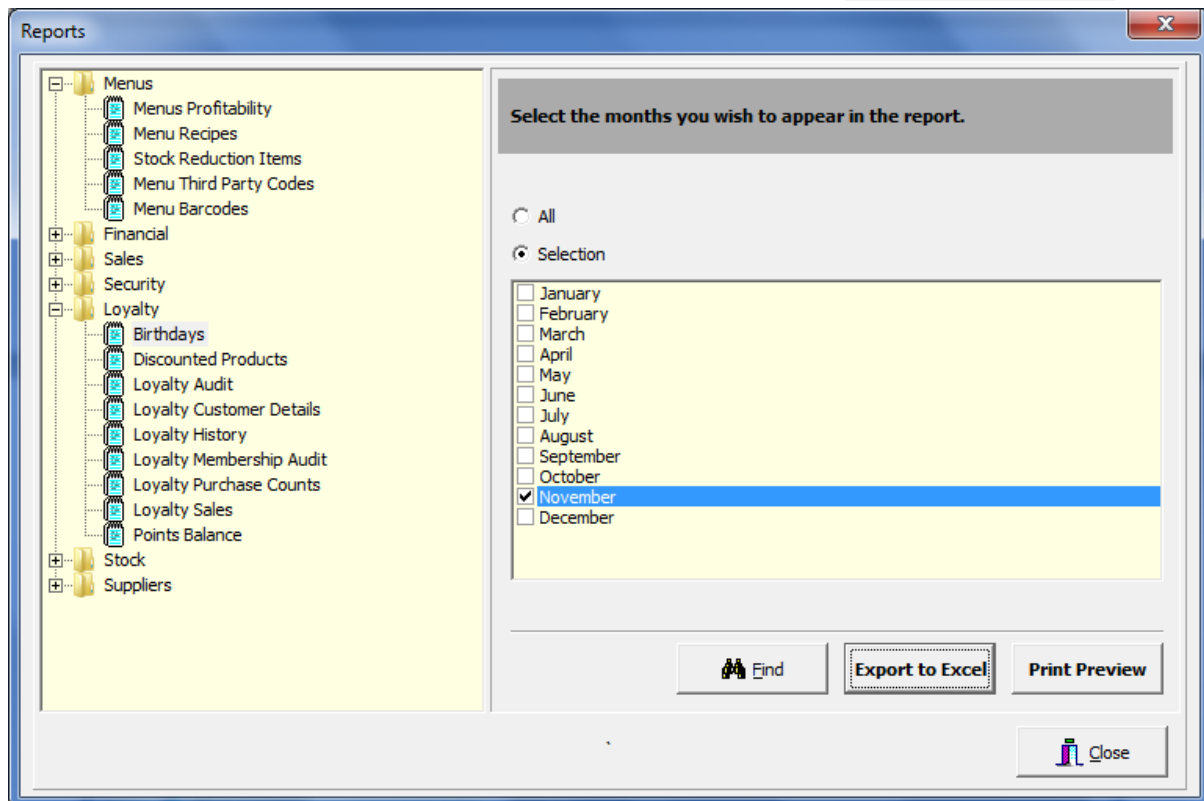
Touch Point #9

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

Happy Birthday! Here is a Free Meal Voucher

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

Export to Excel



Touch Point #10

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