



Loyalty Manual

For Petrosoft Customers

Version 3.1

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ABOUT LOYALTY

Loyalty programs are a powerful marketing tool to support your company business objectives. When you run loyalty programs, you increase customers loyalty, encourage customers to return to your stores and make more frequent purchases. Loyalty programs help achieve the following goals:

- Provide customers with discounts and promotions based on their shopping history.
- Allow vendors to influence customers' shopping behavior and increase brand loyalty.
- Provide vendors with a tool to track statistics of their products purchases.

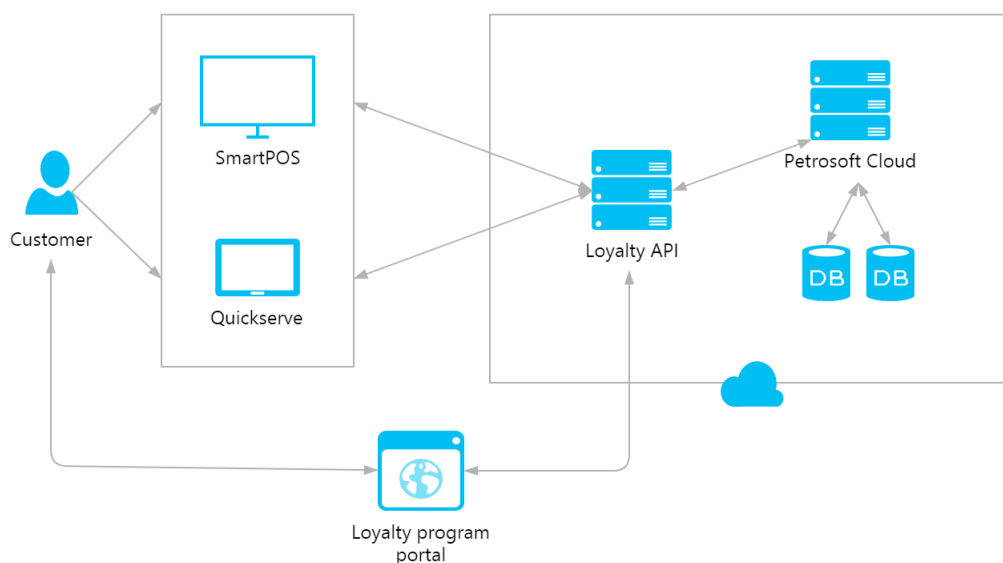
Petrosoft, LLC offers GO Loyalty Reward—a web-based portal that lets you organize and implement loyalty programs. With the GO Loyalty Rewards system, you can create and maintain closed loop loyalty programs for single stores and chains. GO Loyalty Reward features the following advantages:

- **Multiple loyalty programs for different stores.** The GO Loyalty Rewards system allows setting up and running a diverse range of loyalty and rewards programs: point system programs, discount programs and so on. You can create multiple loyalty programs for one account and share them between locations.
- **Variety of customer authentication methods.** Consumers participating in the program can authenticate with a loyalty card, phone number or Passbook.
- **QwickServe and SmartPOS integration.** The GO Loyalty Rewards system fully integrates with QwickServe and SmartPOS, allowing customers to earn loyalty points, use them and send loyalty data to Petrosoft Cloud.
- **House account payments support.** The GO Loyalty Rewards system provides support for house accounts payments and fleet cards.

HOW LOYALTY PROGRAM WORKS

When setting up and running loyalty programs, parties participating in the loyalty campaign perform the following activities:

1. A manager sets up a loyalty program with the help of the GO Loyalty Rewards system and launches it in the store.
2. A customer making purchases authenticates with the loyalty card, phone number or Passbook at the POS.
3. The POS accesses Petrosoft Cloud to request loyalty-related data, including:
 - o How many loyalty points the customer has.
 - o What discounts are available to the customer.
 - o What promotions are available to the customer and so on.
4. The POS collects all loyalty data from Petrosoft Cloud.
5. After the cashier scans all items that the customer purchases, the POS displays information about discounts and promotions for the customer in the real-time mode.
6. When paying for purchases, the customer can use earned loyalty points or apply the discount.
7. The POS sends data about used loyalty points to Petrosoft Cloud.
8. If the loyalty program portal is available, the customer can log in to the portal to get information about available promotions, track purchase transactions and check the discount or number of remaining loyalty points.



LOYALTY PROGRAM SETUP

To set up a loyalty program with the GO Loyalty Rewards system, you must perform the following actions and create the following objects:

- 1. Plan your loyalty strategy.**

Before you start implementing your loyalty strategy, you must define primary objectives of the loyalty program, decide on the program type, select what items will be promoted, define the target audience and design program rules.

- 2. Activate the loyalty settings.**

You must activate the loyalty settings for the account that you plan to use to work with the loyalty program in the GO Loyalty Rewards system. For more details, see [Activating Loyalty Settings](#).

- 3. Create a loyalty program.**

You must create a new loyalty program and set up basic settings for it such as program title, description, duration and loyalty rewards limits. For more details, see [Creating Loyalty Programs](#).

- 4. Obtain a loyalty ID range.**

You must request from Petrosoft, LLC a range of loyalty IDs for consumers who are going to take part in the loyalty program. On obtaining the loyalty IDs, you need to give them to your consumers, for example, printed on loyalty cards or as numeric IDs linked to phone numbers. For more details, see [Requesting Loyalty ID Ranges](#).

- 5. Set up promotions.**

You must set up promotions for Price Book items to which the loyalty program will be applied. For more details, see [Working with Promotions](#).

- 6. Set up loyalty discounts.**

If the loyalty program presupposes discounts for frequent consumers, you must set up fixed or variable discount rates when requesting a loyalty ID range. For more details, see [Setting Up Loyalty Discounts](#).

- 7. Send updates to the register.**

After you set up promotions in the Price Book, you must send updated information to the cash register. For more details, see the [Cash Register Update Manager](#) section in the Petrosoft Cloud Help.

- 8. (Optional) Publish promotions and banners on the loyalty program portal.**

You can order a loyalty program portal from Petrosoft, LLC. On the portal, you can promote your specials and let your customers track their loyalty points balance. For more details, see [Loyalty Program Portal](#).

Activating Loyalty Settings

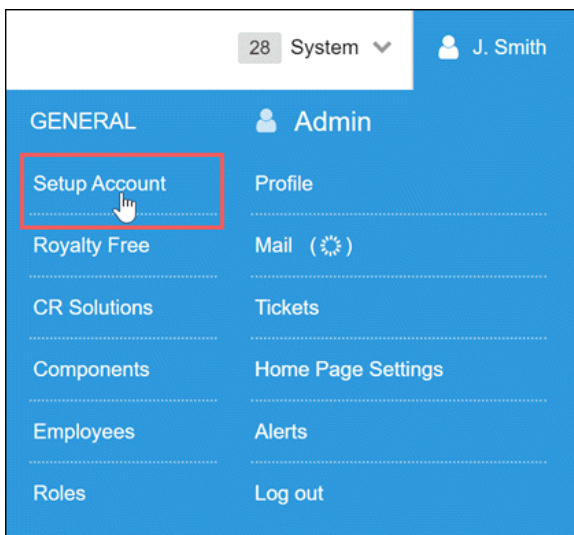
Before you can set up loyalty programs, you need to activate the loyalty settings for the account that you plan to use for work with loyalty data.



To activate the loyalty settings, you must use an account with the system user role.

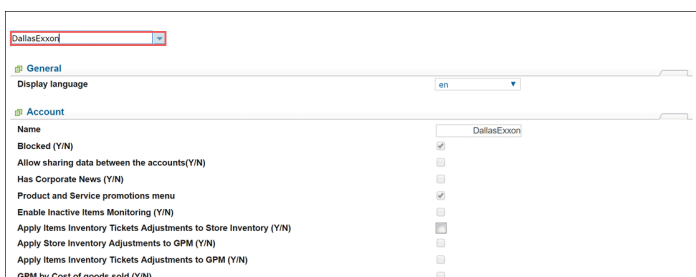
To activate the loyalty settings for a certain account, follow the steps:

1. Log in to C-Store Office under an account with the system user role.
2. At the top right corner of the main C-Store Office view, click your account name and select **General > Setup Account**.



Result: The setup account view opens.

3. In the accounts list, select the account for which you want to activate the loyalty settings.



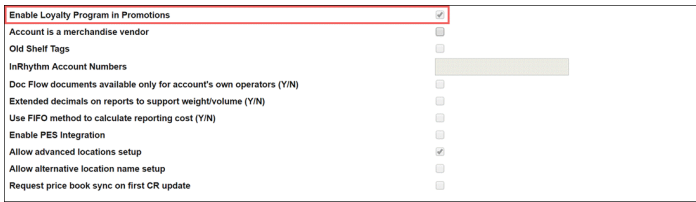
Result: The setup account view reloads for the selected account.

4. At the bottom of the account view, click **Edit**.

Result: The setup account view opens in the editing mode.

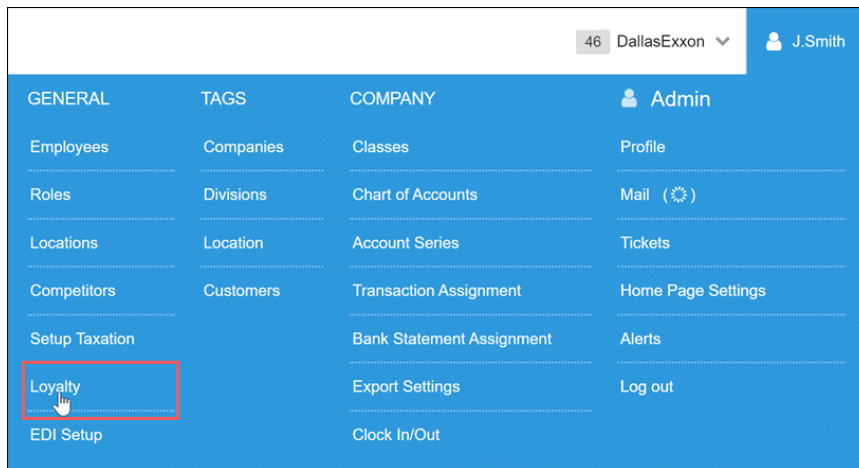
5. Select the **Enable Loyalty Program in Promotions** check box.

6. At the bottom of the account view, click **Save**.

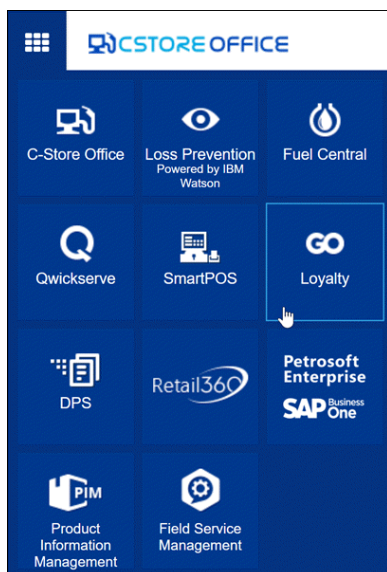


7. At the top right corner of the main C-Store Office view, select the account whose settings you have updated. Make sure that the loyalty settings are activated for the account in one of the following ways:

- o At the top right corner of the main C-Store Office view, click the account name and make sure that the **Loyalty** menu option is available. When you click the option, the **GO Loyalty Rewards** product page must be opened.



- o Go to **Product Switcher** and make sure that the **Loyalty** product is available. When you click the option, the **GO Loyalty Rewards** product page must be opened.



Managing Loyalty Programs

To start implementing your loyalty strategy, you must set up one or more loyalty programs. The loyalty program is the core component in the GO Loyalty Rewards system. It lets you define the rules by which the loyalty program must be organized: when the program must start and end, at which locations it must be in effect, what are the limits for loyalty points usage and so on.

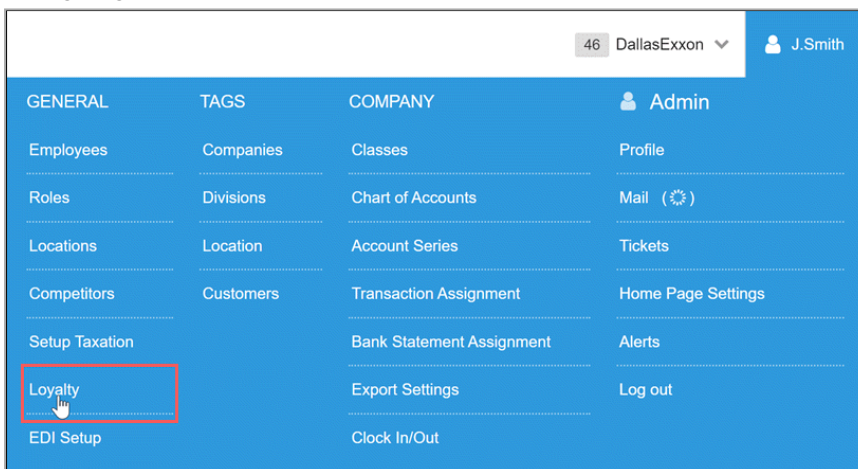
To set up loyalty programs, use the **GO Loyalty Rewards** portal. You can perform the following actions with loyalty programs:

- Create loyalty programs
- Edit loyalty programs
- Delete loyalty programs

Creating Loyalty Programs

To create a new loyalty program, follow the steps:

1. At the top right corner of the main C-Store Office view, click the account name and select **General** > **Loyalty**.

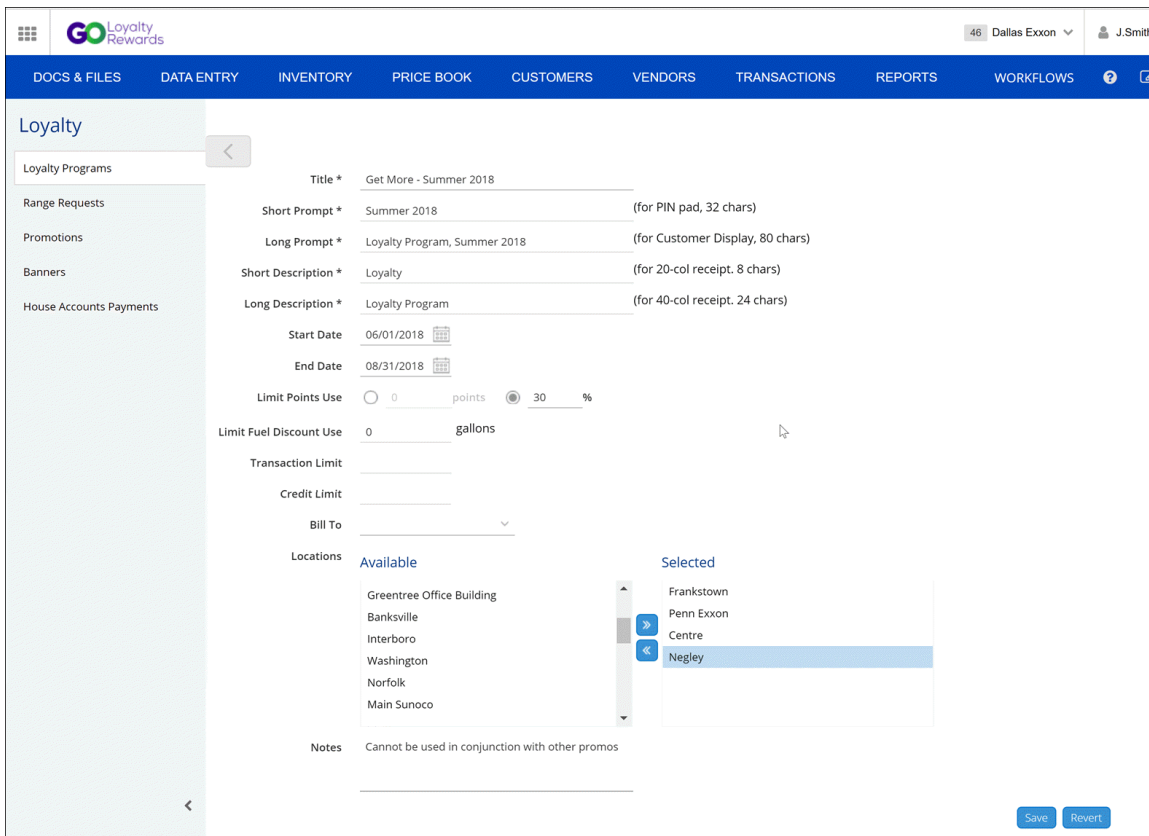


Result: The **GO Loyalty Rewards** page opens.

2. At the top right corner of the loyalty programs list, click the add icon.
3. In the **Title** field, enter the loyalty program name. The program title is used to identify the program in the GO Loyalty Rewards system.
4. In the **Short Prompt** field, enter a short name for the program to be displayed at the PIN pad.
5. In the **Long Prompt** field, enter a long name for the program to be displayed on the customer display.

6. In the **Short Description** field, enter a short description of the program to be printed on receipts that are 20 symbols wide.
7. In the **Long Description** field, enter a long description of the program to be printed on receipts that are 40 symbols wide.
8. Use the **Start Date** and **End Date** field to set up the program duration.
10. To limit loyalty rewards usage, populate one or several of the following fields:
 - o In the **Limit Points Use** field, specify the maximum number of loyalty points that can be used for one purchase. You can set the limit as the exact number of points or percentage of the price that can be paid with loyalty points.
 - o In the **Limit Fuel Discount Use** field, specify the maximum amount of fuel in gallons that the customer can get using loyalty rewards. As soon as the customer gets the maximum amount of fuel, fuel filling is stopped. If the customer needs more fuel, a new purchase transaction at a regular price is created.
 - o In the **Transaction Limit** field, specify the limit for the transaction amount.
 - o In the **Credit Limit** field, specify the credit limit for the customer.
11. In the **Bill To** list, select a vendor to which bills for the loyalty program must be issued.
12. In the **Locations** section, set up a list of locations at which the program will be in effect. If no location is selected, the program will be in effect at all locations.
13. In the **Notes** field, provide additional information about the loyalty program if necessary.

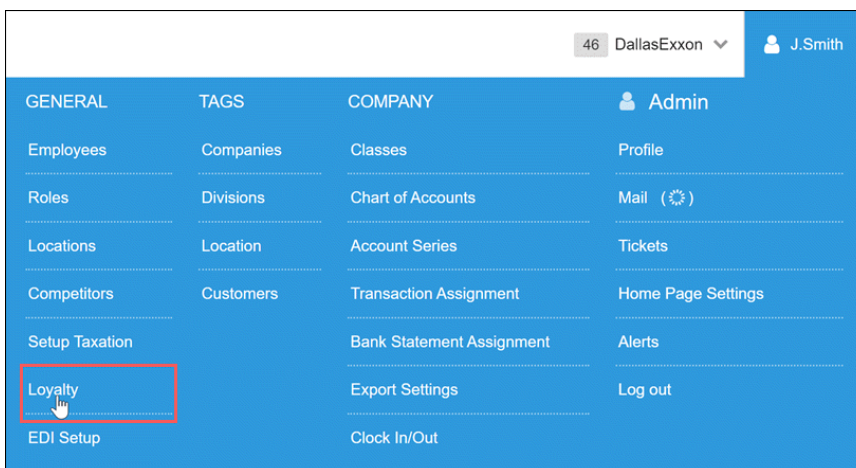
14. At the bottom of the loyalty program view, click **Save** to save the created loyalty program.



Editing Loyalty Programs

To edit a loyalty program, follow the steps:

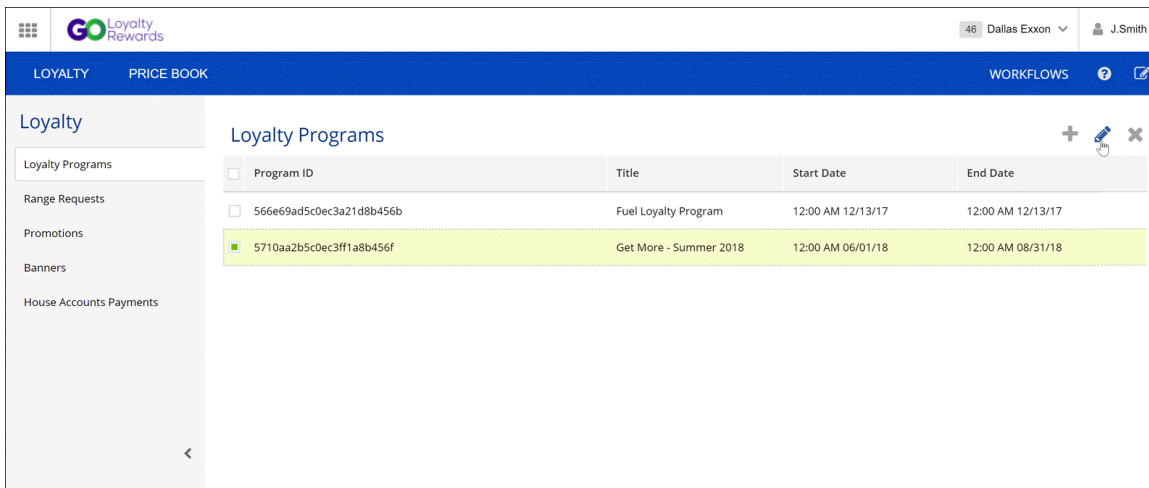
1. At the top right corner of the main C-Store Office view, click the account name and select **General** > **Loyalty**.



Result: The **GO Loyalty Rewards** page opens.

2. In the loyalty programs list, select the necessary program.

- At the top right corner of the loyalty programs list, click the edit icon.

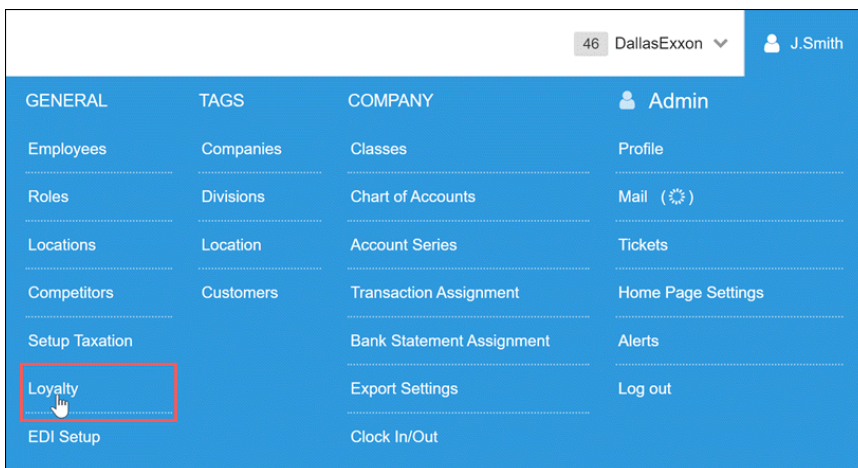


- Edit settings of the loyalty program as required.
- At the bottom of the loyalty view, click **Save** to save the changes.

Deleting Loyalty Programs

To delete a loyalty program, follow the steps:

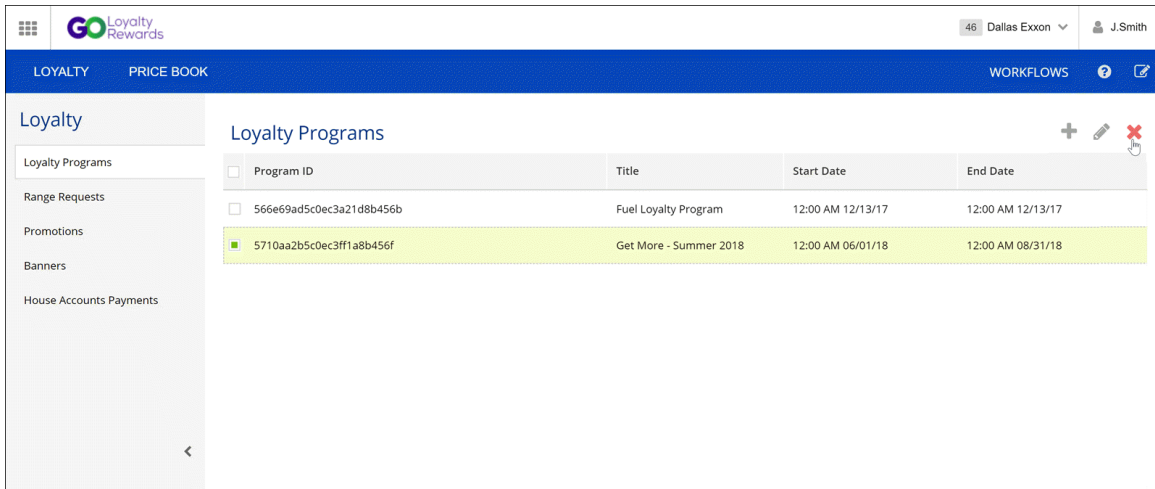
- At the top right corner of the main C-Store Office view, click the account name and select **General > Loyalty**.



Result: The **GO Loyalty Rewards** page opens.

- In the loyalty programs list, select the necessary program.

3. At the top right corner of the loyalty programs list, click the delete icon.



Managing Loyalty ID Ranges

One of the crucial parts in the loyalty system is the mechanism of customers' identification. In most cases, customers participating in the loyalty program obtain loyalty or discount cards with encoded loyalty IDs. Cards are linked with customers' account: when customers present the cards at the register, they get access to the loyalty rewards and promotions.

In the GO Loyalty Reward system, loyalty IDs are managed by Petrosoft, LLC. When you create a new loyalty program, you can request a certain number of loyalty IDs for it. A Petrosoft, LLC representative reviews and approves your request, and reserves a specific loyalty ID range for your loyalty program. After that, you can provide your customers with IDs from the reserved range.

You need to obtain loyalty IDs for customers in the following cases:

- You plan to issue loyalty or discount cards for the loyalty program.
- You need new loyalty IDs for QwickServe customers.

Petrosoft, LLC generates the following data for loyalty ID ranges:

- Card numbers, for example, 100000000001.
- Printable card numbers in handy printable format, for example, 1000 0000 0001.
- Encoded card numbers to be used for encoding on magnetic stripes or as QR codes, for example, 100000000001=1=DI30DNRUG630CPE73HD09DNV.

To work with loyalty IDs, use the **GO Loyalty Rewards** portal. You can perform the following actions:

- [Request a loyalty ID range](#)
- [Export the loyalty ID range](#)
- [Delete the loyalty ID request](#)
- [Get notifications about the loyalty ID range](#)

Requesting Loyalty ID Ranges

To request a loyalty ID range from Petrosoft, LLC, follow the steps:

1. In the **GO Loyalty Rewards** portal, create a loyalty program or open an existing loyalty program for editing.
2. Scroll down to the bottom of the loyalty program view.
3. At the top right corner of the **Loyalty ID Ranges** table, click the add icon.

4. In the **Title** field, enter the title for the requested loyalty ID range.
5. In the **Type** list, define the purpose for which you plan to use loyalty IDs:
 - **Loyalty**: For standard loyalty cards.
 - **QwickServe**: For virtual cards for QwickServe users.
 - **Discount**: For discount cards
 - **Gift**: For gift cards (not supported at the moment)
 - **House account**: For cards used for house account payments
6. **Value**, **Add Value** and **Add Value Availability** fields are used for setting up discounts. For more details, see [Setting Up Loyalty Discounts](#).
7. In the **IDs Count** field, enter the number of loyalty IDs that you require for the loyalty program.
8. In the **Notes** field, enter additional information about the requested loyalty ID range if necessary.
9. Click **Update**.

The screenshot shows the CSTORE OFFICE interface. The top navigation bar includes 'DOCS & FILES', 'DATA ENTRY', 'INVENTORY', 'PRICE BOOK', 'CUSTOMERS', 'VENDORS', 'TRANSACTIONS', 'REPORTS', and 'WORKFLOWS'. The user is logged in as 'J.Smith' from 'Dallas Exxon'. The main content area is titled 'Loyalty' and contains a 'Loyalty Programs' section with 'Save' and 'Revert' buttons. Below this is the 'Loyalty IDs Ranges' table. The table has the following columns: Request ID, Title, Type, Value, Add Value, Add Value Availability, IDs Count, Notes, Created, Approved, and Status. A single row is displayed with the following values: Request ID: Get, Title: Loyalty, Type: Loyalty, Value: 0, Add Value: 0, Add Value Availability: 0, IDs Count: 200, Notes: Loyalty ID. Below the table are 'Update' and 'Cancel' buttons.

Result: Information about the loyalty ID range is sent to a Petrosoft, LLC representative.



You can periodically check the status of the requested ID range to make sure it is approved. To check the status of the ID range, open the loyalty program for editing and view the **Status** column in the **Loyalty ID Ranges** table.

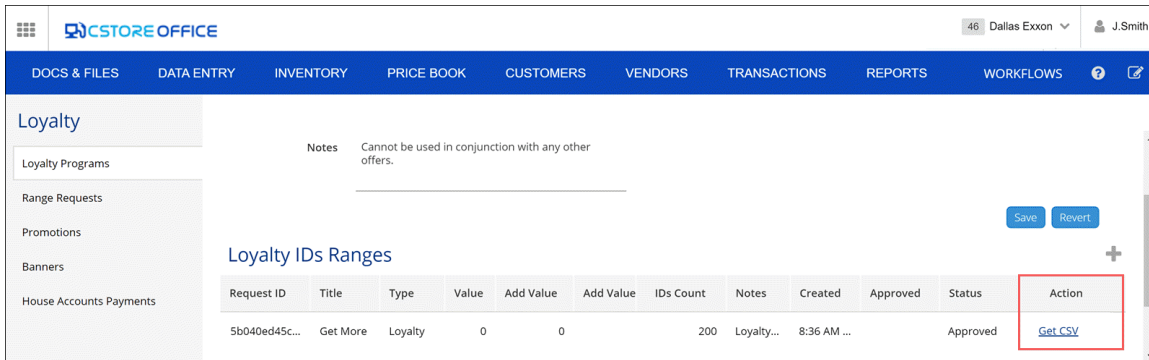
Exporting Loyalty ID Ranges

You can export the loyalty ID range from the GO Loyalty Rewards system to a CSV file. For example, you may need to export information about loyalty IDs to issue loyalty cards for customers who participate in the loyalty program.

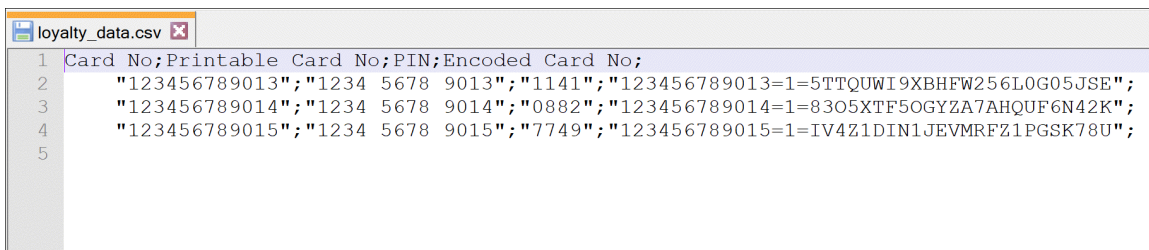
To export data of a loyalty ID range, follow the steps:

1. In the **GO Loyalty Rewards** portal, open the necessary loyalty program for editing.
2. Scroll down to the bottom of the loyalty program view.

- In the **Loyalty ID Ranges** table, in the **Action** column for the necessary loyalty ID range, click **Get CSV**.



Result: Data about the loyalty ID range is exported to a CSV file and saved in the default downloads folder.

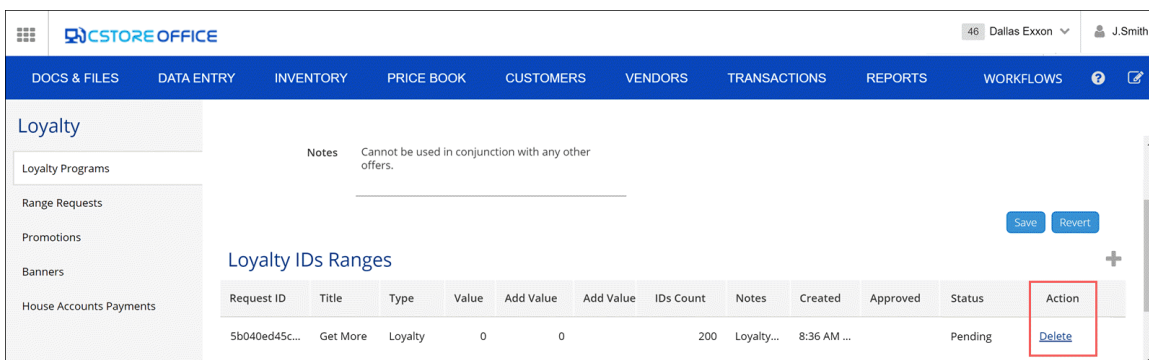


Deleting Loyalty ID Requests

Before the requested ID range is approved, you can delete the request, for example, if the loyalty ID range is no longer required.

To delete a loyalty ID range request, follow the steps:

- In the **GO Loyalty Rewards** portal, open the necessary loyalty program for editing.
- Scroll down to the bottom of the loyalty program view.
- In the **Loyalty ID Ranges** table, in the **Action** column for the necessary loyalty ID range, click **Delete**.



Getting Notifications About Loyalty ID Ranges

If the number of IDs in the range requested for the loyalty program runs below some threshold, Petrosoft, LLC can send you an email notification. In this case, you can request another loyalty ID range for the same loyalty program.

To set the threshold for email notifications, follow the steps:

- From the C-Store Office home page, do one of the following:
 - At the bottom of the left column, click **Alerts > Alerts Setup**.
 - At the top right of the home page, click your user name > **Admin > Alerts**.
Result: The alerts setup page opens.
- In the **Inventory** list on the left, select **Loyalty**.
- In the **Monitoring :: Loyalty** view, select the **Enable loyalty ID pool level notifications** check box.
- In the **Recipients** field, enter an email address at which the notification must be sent.
- In the **Add Loyalty ID Pool Critical Threshold** field, enter the threshold value in percent.

The screenshot shows the C-Store Office interface. At the top, there is a navigation bar with the following tabs: DOCS & FILES, DATA ENTRY, INVENTORY, PRICE BOOK, CUSTOMERS, VENDORS, and TRANSACTIONS. On the left side, there is a sidebar menu with the following items: Sales, Purchases, Budget, Profit, Inventory, Discipline, Red Flags, Wrong Departments, Import Items, Fuel Inventory, Attention, Item Flags, Home Page Settings, Sabotage Prevention, and Loyalty. The main content area is titled "Monitoring :: Loyalty". It contains the following settings:

- ENABLE LOYALTY ID NOTIFICATIONS
- ENABLE LOYALTY ID POOL LEVEL NOTIFICATIONS

Please select the threshold at which you would like to receive updates about your pool of loyalty ID numbers.

Under the "Recipients" section, there is a text input field containing "john.smith@mycompany.com" and an "Add" button. Below this, there is a "Loyalty ID Pool Critical Threshold" section with a text input field containing "10". At the bottom of the form, there is a green "Save" button.

Result: When the number of IDs in the range falls below the set threshold, Petrosoft, LLC will send you a notification at the specified email address.

Working with Promotions

After you create a loyalty program in the GO Loyalty Rewards system, you must set up promotion campaigns and activate the loyalty program for them. The GO Loyalty Rewards system integrates with C-Store Office and allows you to configure promotions with the help of the Promotions tool.

With the Promotions tool, you can set special discounts and enticements for your customers. The tool supports various promotion types, from simple price reductions for a specific period of time to more advanced offers based on the sale of specific quantities or a combination of items in a transaction.

Loyalty programs can be activated for the following types of promotions:

- Mix & Match
- Price Each Mix
- Price Modifier
- Price Reduction
- House Accounts

To set up a promotion and activate the loyalty program for it, follow the steps:

1. From the top menu in C-Store Office, select **Price Book > Promotions**.
2. At the top of the promotions list, click **Add New** to create a new promotion or select an existing promotion in the list and click **Edit**.
3. Configure general promotions settings as required. For more details, see the [Promotions Setup Form](#) section in the Petrosoft Cloud Help.
4. In the **Loyalty** section, configure the loyalty program settings for the promotion:
 - Select the **Use Shopping History** check box to activate the loyalty program for the promotion.
 - Select the **Loyalty Only Promotion** check box to make the promotion available for customers with loyalty IDs.
 - Select the **Earn Points** check box to allow customers to accumulate loyalty points. In the **Points per** list, define the way customers can earn loyalty points. Do either of the following:
 - Select **\$** and define how many loyalty points a customer can earn for spending one dollar.
 - Select **Promotion** and define how many loyalty points a customer can earn for one promotion.
 - Select the **Use Points** check box to allow customers to pay for loyalty items with loyalty points. In the **Points per \$** field, enter the number of loyalty points per dollar to be used.

- o Select the **Earn Fuel Discount** check box to allow customers to get a fuel discount for purchasing loyalty items at the gas station. In the **\$ per promo** field, set the dollar amount of the fuel discount.

Loyalty	
<input checked="" type="checkbox"/> Use Shopping History	
<input checked="" type="checkbox"/> Loyalty Only Promotion	
<input checked="" type="checkbox"/> Earn Points	Points per \$: 0.50
<input checked="" type="checkbox"/> Use Points	Points per \$: 0.50
<input checked="" type="checkbox"/> Earn Fuel Discount	\$ per promo : 10.00

5. At the top of the promotions view, click **Save**.

Setting Up Loyalty Discounts

Discount loyalty programs are organized to give frequent consumers a certain discount when they make purchases. For example, if a customer presents a discount card, he or she gets \$0.20 off a regular price per fuel gallon.

In some cases, however, you may need to set up an additional discount for promoted items. The additional discount is applied in the following way:

- On some week days, the regular discount is applied. For example, a customer gets a \$0.20 discount Friday through Sunday.
- On the other week days, the additional discount is applied. For example, a customer gets a \$0.40 discount Monday through Thursday.

You can set up regular and additional discount rates when you request a loyalty ID range. To set up the discount rates, follow the steps:

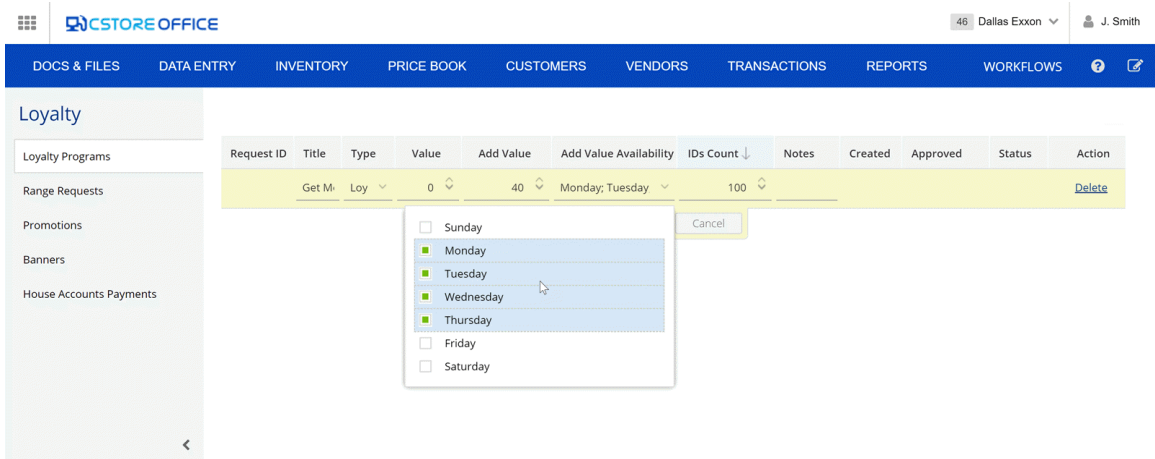
1. In the **GO Loyalty Rewards** portal, create a loyalty program or open an existing loyalty program for editing.
2. Scroll down to the bottom of the loyalty program view.
3. At the top right corner of the **Loyalty ID Ranges** table, click the add icon.
4. In the **Title**, **IDs Count** and **Notes** fields, specify the necessary data for the loyalty ID range. For more details, see [Managing Loyalty ID Ranges](#).
5. In the **Type** list, select **Discount**.
6. In the **Value** field, enter the regular discount rate in cents.
7. In the **Add Value** field, enter the additional discount rate in cents.



When entering discount rates, use integers. In the opposite case, SmartPOS will not be able to recognize the discount rate.

8. In the **Add Value Availability** list, select check boxes next to days on which the additional discount must be applied.

9. Click **Update**.



Result: Information about the loyalty ID range is sent to a Petrosoft, LLC representative. When the loyalty ID range is approved, the specified discount rates will be used for customers with loyalty IDs.

Viewing House Account Payments

If you set up a loyalty program to use house accounts payments, you can track made payments in the GO Loyalty Rewards system.

To track house accounts payments, in the left menu of the GO Loyalty Rewards portal, select **House Accounts Payments**. The House Accounts Payments view displays payments for customers registered in C-Store Office. For more details, see the [Customers](#) section in the Petrosoft Cloud Help.

Bill To	Program	Location	Date	Amount	Notes
Customer #8		Cochran	05/04/16	\$50.00	
Customer #8		Cochran	05/04/16	\$34.00	
Customer #8		Cochran	05/05/16	\$80.00	
Customer #8		Cochran	05/05/16	\$101.00	
Customer #8		Cochran	05/05/16	\$80.00	
Customer #8		Cochran	05/05/16	\$99.00	
Customer #8		Cochran	05/05/16	\$98.00	

If necessary, you can add, edit or delete house account payments manually:

- To add a payment, at the top right corner of the payments list, click the add icon, enter the necessary payment data and click **Update**.
- To edit a payment, double-click it in the payments list, edit the payment data and click **Update**.
- To delete a payment, select it in the payments list and click the delete button.

LOYALTY PROGRAM PORTAL

To support your loyalty program, you can request Petrosoft, LLC to create a personal domain website with your company logo, branding and colors. The loyalty program portal is an engaging front end that can help you promote your specials and drive your sales. It also serves as a customer portal where your customers can check the number of earned loyalty points and track transactions that they made in the loyalty program.



The functionality of the loyalty program portal may differ depending on your needs. This topic describes basic functionality by the example of the <http://market24.goloyaltyrewards.com> portal.

Market 24 LOCATIONS

Red Bull 4pk 8oz ONLY \$6.99
with Market 24 loyalty card
(regular price \$8.99)

SIGN IN

PHONE OR CARD NUMBER PIN

064 000 0000 ****

Forgot PIN? Sign Up SUBMIT

COFFEE CLUB 6 for 5
Join the Market 24 coffee club, buy 5 coffee drinks and get your 6th drink for free.

COOL OFF! BUY UNITED ICED TEA 3 HALF GALLONS FOR \$3.00
Purchase 2 half gallons of United Iced Tea for \$3.00 + add another for free with your Market 24 loyalty card!

Banner on the loyalty program portal

Promotions on the loyalty program portal

You can perform the following actions with the loyalty program portal using the GO Loyalty Rewards system:

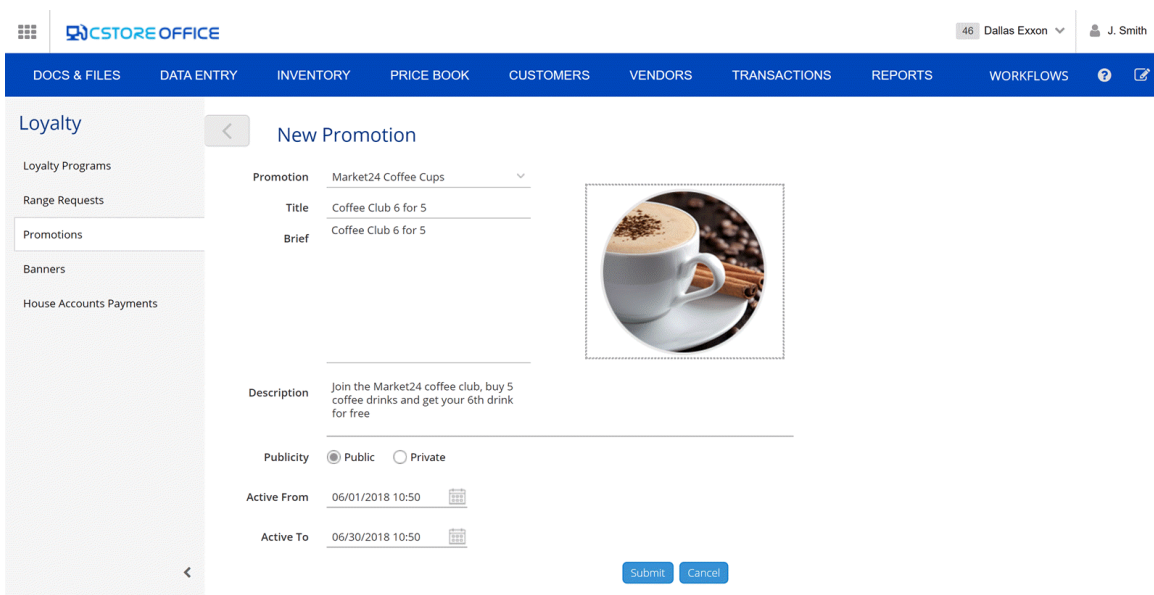
- Publish promotions on the portal
- Publish banners on the portal
- (For customers) Track earned loyalty points and transactions

Publishing Promotions

You can periodically publish information about upcoming and valid promotions on the loyalty program portal. Promotions are published on the home page of the loyalty program portal, below the banner area.

To publish a promotion on the portal, follow the steps:

1. In the left menu of the **GO Loyalty Rewards** portal, click **Promotions**.
2. At the top right corner of the promotions list, click the add icon.
3. In the **Promotion** list, select the necessary promotion configured in the Price Book in C-Store Office.
4. In the **Title** field, enter the promotion title.
5. In the **Brief** field, enter a short description of the promotion that must be published on the portal.
6. In the **Details** field, enter a detailed description of the promotion that must be published on the portal.
7. In the **Publicity** field, select **Public** if you want to publish the promotion immediately after its creation or **Private** if you want to save the promotion for publishing in future.
8. Use the **Active From** and **Active To** fields to specify the time span when the promotion must be published on the portal.
9. In the image box, click **Choose image from your computer** and select an image for the promotion or simply drag the image to the image box. The image size must be 244x244 in pixels.
10. At the bottom of the promotions view, click **Save** to save the changes.



The screenshot shows the 'New Promotion' form in the C-Store Office Loyalty Rewards portal. The form is titled 'New Promotion' and is located in the 'Promotions' section of the left-hand menu. The form fields are as follows:

- Promotion:** Market24 Coffee Cups
- Title:** Coffee Club 6 for 5
- Brief:** Coffee Club 6 for 5
- Description:** Join the Market24 coffee club, buy 5 coffee drinks and get your 6th drink for free
- Publicity:** Public Private
- Active From:** 06/01/2018 10:50
- Active To:** 06/30/2018 10:50

An image of a coffee cup is uploaded to the image box. At the bottom of the form, there are 'Submit' and 'Cancel' buttons.

After you publish a promotion on the website, you can perform the following actions with it:

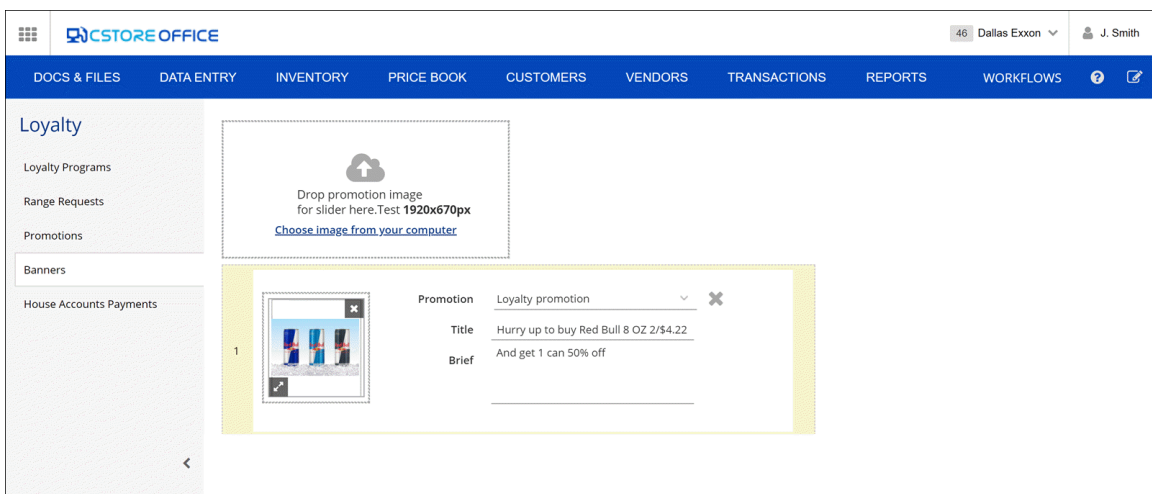
- Edit a promotion: in the promotions list, select the necessary promotion, click the edit icon, edit the promotions data as required. Then save the changes.
- Stop publishing a promotion on the portal: in the promotions list, select the necessary promotion, click the edit icon and in the **Publicity** field select **Private**. Then save the changes.
- Delete a promotion: in the promotions list, select the necessary promotion and click the delete icon.

Publishing Banners

You can publish banners about promotions and promoted items on the loyalty program portal. Banners are published on the home page of the loyalty program portal, immediately below the website header.

To publish a banner on the portal, follow the steps:

1. In the left menu of the **GO Loyalty Rewards** portal, click **Banners**.
2. In the image box, click **Choose image from your computer** and select the banner image or simply drag the image to the image box. The image size must be 1920x670 in pixels.
3. In the **Promotion** list, select the promotions for which the banner is created.
4. In the **Title** field, enter the title under which the banner must be published on the portal.
5. In the **Brief** field, enter a short description of the banner that must be published on the portal.



To delete a banner from the portal, click the delete icon in the necessary banner box.

Tracking Loyalty Points and Transactions

Customers who participate in the loyalty program can log in to the loyalty program portal using the loyalty card number or phone number and perform the following actions:

- Check how many loyalty points the customer has earned.
- Track transactions that the customer has made in the program and see how many points the customer has used.
- Fill and update the customer profile if needed.

Market 24

LOCATIONS

SIGN IN

PHONE OR CARD NUMBER PIN

064 879 8789 ●●●●

[Forgot PIN?](#) [Sign Up](#) **SUBMIT**

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LOYALTY REPORTS

You can view the following loyalty reports in C-Store Office:

- Merchandise Loyalty Report—provides detailed information about the loyalty amount for each station, department and shift.
- Loyalty Ranges Status Report—provides information about loyalty ID ranges, such as the title of the program for which the range was reserved, total number of IDs and number of free IDs in the range and other data related to loyalty ID ranges.
- House Accounts Report—provides information about house accounts payments made by customers.

EXAMPLE OF LOYALTY PROGRAM SETUP

With the GO Loyalty Rewards system, you can set up various types of loyalty programs that meet your needs. The example below illustrates how to set up a program for earning and using loyalty points.

This type of loyalty program lets your customers earn loyalty points when they shop. For purchasing specific items, the customer gets some loyalty points that are accumulated on customer's account. The customer can then use the accumulated loyalty points to pay for purchases.

Prerequisites

The loyalty settings must be activated for the account that you plan to use to work with the GO Loyalty Rewards system. For more details, see [Activating Loyalty Settings](#).

Step-By-Step Walkthrough

To set up a loyalty program of this type, you need to define rules by which loyalty rewards can be earned and used. You will set up promotions of two types:

- Promotion for earning loyalty points: when your customers purchase items from this promotion, they will earn a certain number of loyalty points.
- Promotion for using loyalty points: when your customers purchase items from this promotion, they can pay for the items with accumulated loyalty points.

Step 1. Create Loyalty Program

To create the loyalty program, follow the steps:

1. At the top right corner of the main C-Store Office view, click the account name and select **General** > **Loyalty**.
2. At the top right corner of the loyalty programs list, click the add icon.
3. In the **Loyalty** view, specify basic settings for the created program. For more details, see [Creating Loyalty Programs](#).

4. Click **Save**.

The screenshot shows the 'Loyalty' configuration page in the C-Store Office system. The left sidebar contains navigation options: Loyalty Programs, Range Requests, Promotions, Banners, and House Accounts Payments. The main area is titled 'Loyalty' and contains the following fields:

- Title *: Get More - Summer 2018
- Short Prompt *: Summer 2018 (for PIN pad, 32 chars)
- Long Prompt *: Loyalty Program, Summer 2018 (for Customer Display, 80 chars)
- Short Description *: Loyalty (for 20-col receipt, 8 chars)
- Long Description *: Loyalty Program (for 40-col receipt, 24 chars)
- Start Date: 06/01/2018
- End Date: 08/31/2018
- Limit Points Use: 0 points 30 %
- Limit Fuel Discount Use: 0 gallons
- Transaction Limit: _____
- Credit Limit: _____
- Bill To: _____
- Locations:
 - Available: Greentree Office Building, Banksville, Interboro, Washington, Norfolk, Main Sunoco
 - Selected: Frankstown, Penn Exxon, Centre, Negley
- Notes: Cannot be used in conjunction with other promos

At the bottom right, there are 'Save' and 'Revert' buttons.

Step 2. Request Loyalty ID Range

To request a loyalty ID range, follow the steps:

1. In the **Loyalty** view, scroll down to the **Loyalty ID Ranges** table.
2. At the top right corner of the **Loyalty ID Ranges** table, click the add icon.
3. In the **Type** list, select **Loyalty**.
4. Fill other fields of the requested range as required. For more details, see [Requesting Loyalty ID Ranges](#).

The screenshot shows the 'Loyalty IDs Ranges' table in the C-Store Office system. The table has the following columns: Request ID, Title, Type, Value, Add Value, Add Value Availability, IDs Count, Notes, Created, Approved, and Status. A single row is visible with the following data:

Request ID	Title	Type	Value	Add Value	Add Value Availability	IDs Count	Notes	Created	Approved	Status
Get	Loyalty	Loyalty	0	0		200	Loyalty ID			

Below the table, there are 'Update' and 'Cancel' buttons.

5. Wait until the requested loyalty ID range is approved and provide your customers with loyalty IDs from this range.

Step 3. Set Up Promotions for Earning Loyalty Points

To set up a promotion for earning loyalty points, follow the steps:

1. From the top menu in C-Store Office, select **Price Book > Promotions**.
2. At the top of the promotions list, click **Add New** to create a new promotion or select an existing promotion in the list and click **Edit**.
3. Configure general promotions settings as required. For more details, see the [Promotions Setup Form](#) section in the Petrosoft Cloud Help.
4. In the **Loyalty** section, select the **Use Shopping History** check box.
5. Select the **Loyalty Only Promotion** check box.
6. Select the **Earn Points** check box. In the **Points per \$** field, enter the number of points you want to reward for every spent dollar. For example, if you want to reward one point for \$2, you need to specify 0.5 in this field.



The screenshot shows the 'Loyalty' settings form. It includes several checkboxes and input fields:

Setting	Value
<input checked="" type="checkbox"/> Use Shopping History	
<input checked="" type="checkbox"/> Loyalty Only Promotion	
<input checked="" type="checkbox"/> Earn Points	Points per \$: 0.50
<input type="checkbox"/> Use Points	Points per \$: 0.00
<input type="checkbox"/> Earn Fuel Discount	\$ per promo: 0.00

7. At the top of the promotion view, click **Save** to save settings of the promotion.

Step 4. Set Up Promotions for Using Loyalty Points

To set up a promotion for using loyalty points, follow the steps:

1. From the top menu in C-Store Office, select **Price Book > Promotions**.
2. At the top of the promotions list, click **Add New** to create a new promotion or select an existing promotion in the list and click **Edit**.
3. Configure general promotions settings as required. For more details, see the [Promotions Setup Form](#) section in the Petrosoft Cloud Help.
4. In the **Loyalty** section, select the **Use Shopping History** check box.
5. Select the **Loyalty Only Promotion** check box.
6. Select the **Use Points** check box. In the **Points per \$** field, define how the item price in loyalty points is calculated. For example, if the item price is \$10 and you want the customer to use 30 loyalty points for it, enter 3 in this field.

Loyalty	
<input checked="" type="checkbox"/> Use Shopping History	
<input checked="" type="checkbox"/> Loyalty Only Promotion	
<input type="checkbox"/> Earn Points	Points per \$: 0.00
<input checked="" type="checkbox"/> Use Points	Points per \$: 3.00
<input type="checkbox"/> Earn Fuel Discount	\$ per promo : 0.00

7. At the top of the promotion view, click **Save** to save settings of the promotion.

Step 5. Send Updates to Register

After you set up a new loyalty program and promotions, you need to send updated data to the register. For more details, see the [Cash Register Update Manager](#) section in the Petrosoft Cloud Help.

Result

As soon as the loyalty program is in effect, a customer with the loyalty ID will get the following rewards:

- When the customer purchases items from Promotion 1 and presents the loyalty card at the register, loyalty points are rewarded to his or her account.
- When the customer pays for items from Promotion 2 and presents the loyalty card at the register, he or she can use loyalty points to pay for the items at the ratio specified in the **Points per \$** field.