

# 1 Loyalty

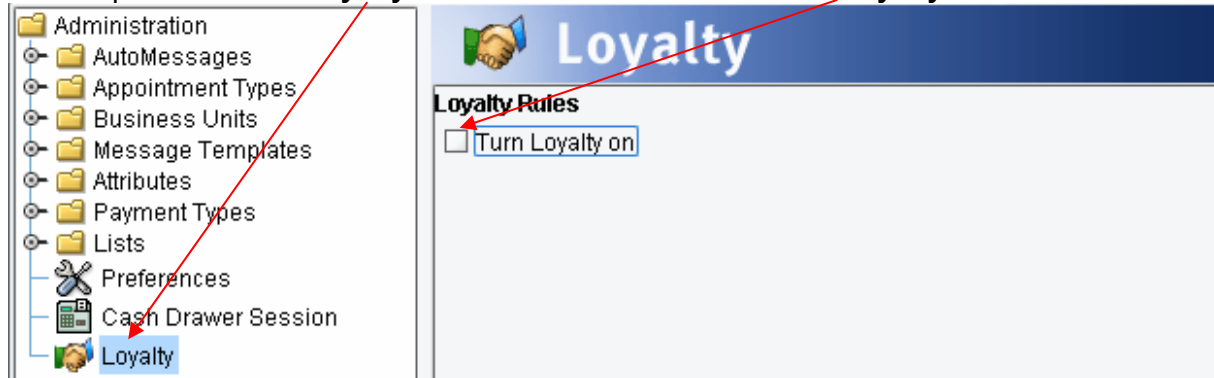


Kitomba™ Loyalty is your own client loyalty programme that lets you reward your customers and give them one more reason to keep coming back.

## 1.1 Loyalty Rules

### Do you want to use the Kitomba™ Loyalty Programme?

First step is to click on **Loyalty** in the Admin Tab and then **Turn Loyalty On**.



### Do you want all your customers to use the program or would you like to choose which customers participate?

By default all customers will be enrolled in the loyalty programme when loyalty is turned on. If you wish to control which customers will/will not be enrolled in the Loyalty programme, then tick this box. If you select this option to enrol customer into loyalty, you will need to tick this box on their **Customer Card**.

### How long should Kitomba™ Dollars (K\$) last?

Enter the amount of months that Kitomba™ Dollars will last.

**NOTE:** Enter 0 to make Kitomba™ Dollars last for ever.

## 1.2 How would you like to run your Loyalty Programme?

There are two different ways of using the Kitomba™ Dollars Loyalty Program, The simplest and easiest way is to select is to use the first option:

**How would you like to run your Loyalty Program ?**

Control the way K\$ can be earned and redeemed by using Service, Retail and Voucher levels

Control the way K\$ can be earned and redeemed by using your sales categories

What does this do ?

### 1.2.1 Option 1: Control K\$ using Service, Retail and Voucher Levels

#### 1.2.1.1 Collecting Kitomba™ Dollars

Enter the number of K\$ that will be earned per \$100 spent on Services, Retail and Vouchers.

##### Collecting Kitomba Dollars

Clients earn this many K\$ for every \$100 spent on **Services:**

Clients earn this many K\$ for every \$100 spent on **Retail:**

Clients earn this many K\$ for every \$100 spent on **Vouchers:**

If you enter 10 this is equivalent to a 10% discount

##### Redeeming Kitomba Dollars

Minimum number of K\$ required to begin redeeming

Redeem K\$ in lots of

#### 1.2.1.2 Redeeming Kitomba™ Dollars

Minimum number of K\$ required to begin redeeming - This is the minimum number of Kitomba™ Dollars that a customer needs to accumulate before they can start using their points.

If the customer has K\$ that can be redeemed, but the number of K\$ is less than their bill total, then they may use their K\$ - but only in multiples of this setting.

Example if this is set to 5 and the customer has K\$ 23, then they may redeem 5, 10, 15 or 20 points but not 21, 22, 23 (as these are not multiples of 5). If you would like your customer to be able to use all their points at once set this to 1.

Select how you want customers to be able to Redeem there K\$.

Redeem K\$ for Services

Redeem K\$ for Products

Redeem K\$ for Vouchers

## 1.2.2 Option 2: Control K\$ using your sales categories

Ticking the second option is slightly more complicated, but gives you much more freedom and flexibility in allocating how clients will gather and redeem Kitomba™ Dollars.

**How would you like to run your Loyalty Program ?**

Control the way K\$ can be earned and redeemed by using Service, Retail and Voucher levels

Control the way K\$ can be earned and redeemed by using your sales categories What does this do ?

**Redeeming Kitomba Dollars**

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### 1.2.2.1 Redeeming Kitomba™ Dollars

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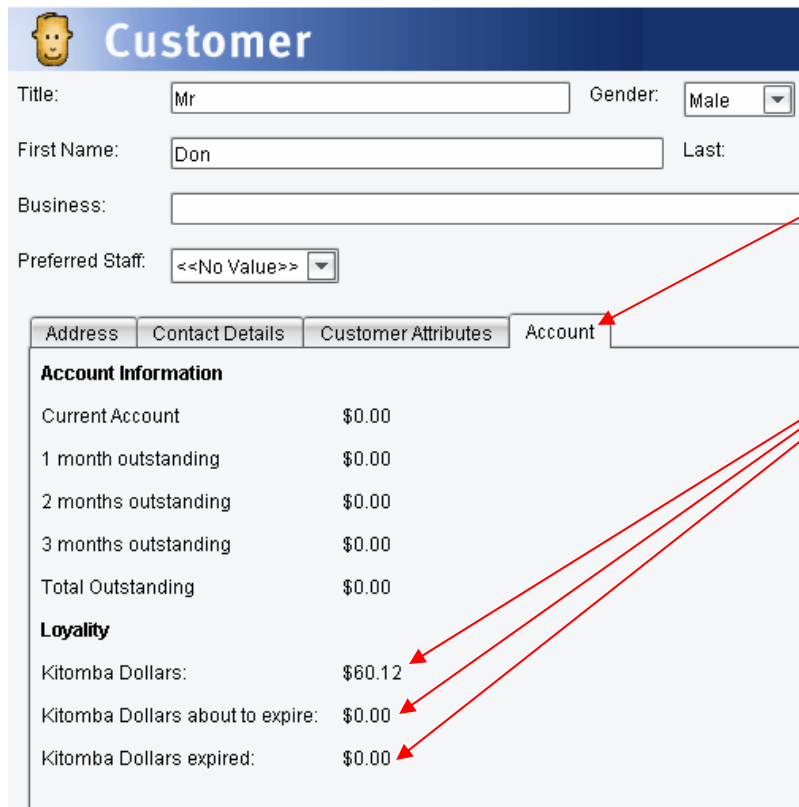
**Please Note:** If you are controlling t K\$ using sales categories, then you will need to adjust the following for each product/service category in the **Cards Tab**

The screenshot shows the 'Cards' tab in the software interface. On the left, there is a 'Product/Service Search' panel with fields for Name, Code, and Type, and a search button. Below it is a tree view of 'Products/Services' with 'PPS' selected. The main area shows the 'Category' settings for 'PPS'. The 'Name' field contains 'PPS'. The 'Description' field is empty. The 'Show on Business Summary' checkbox is unchecked. The 'Nbr of K\$ earned per \$100 spent in this category:' is set to '5'. The 'Clients can redeem K\$ for items in this category:' checkbox is checked. A red arrow points from the 'Cards' tab to the 'Category' settings, and another red arrow points from the 'Clients can redeem K\$ for items in this category:' checkbox to the text below.

Number of K\$ earned per \$100 spent in this category - The number of Kitomba™ Dollars earned per \$100 dollars spent for this category, if there is no value set for each sub category they will earn Kitomba™ Dollars at there parent categories rate.

To allow customers to use their K\$ to purchase products or services in this category then tick this box.

### 1.3 Finding out how much K\$ a Customer has



The screenshot shows a customer profile for 'Don' with the following details:

- Title: Mr
- Gender: Male
- First Name: Don
- Business: (empty)
- Preferred Staff: <<No Value>>

The 'Account' tab is selected, showing the following information:

| Account Information              |         |
|----------------------------------|---------|
| Current Account                  | \$0.00  |
| 1 month outstanding              | \$0.00  |
| 2 months outstanding             | \$0.00  |
| 3 months outstanding             | \$0.00  |
| Total Outstanding                | \$0.00  |
| Loyalty                          |         |
| Kitomba Dollars:                 | \$60.12 |
| Kitomba Dollars about to expire: | \$0.00  |
| Kitomba Dollars expired:         | \$0.00  |

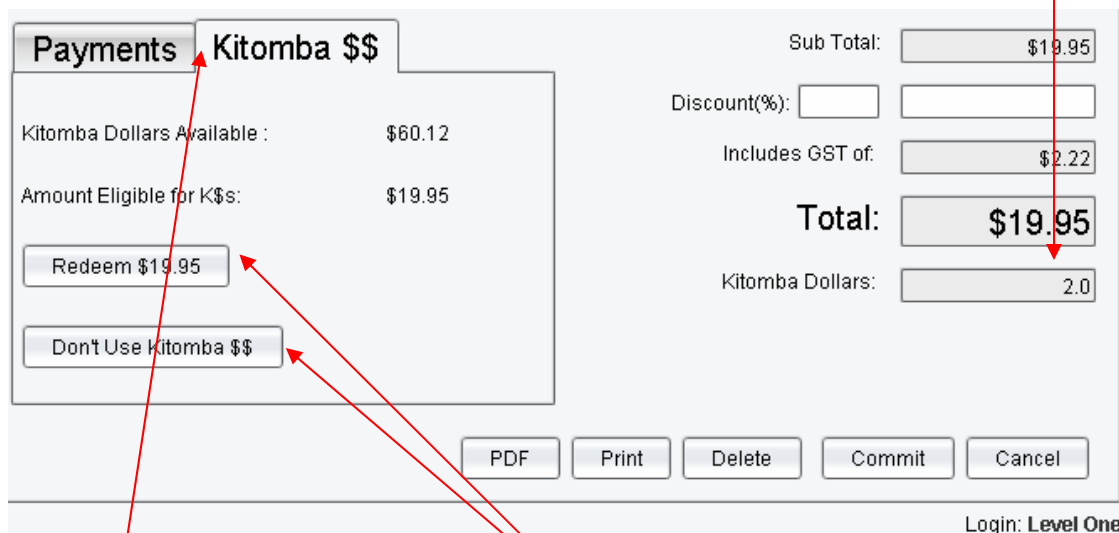
In the **Cards** Tab, click on a customer, and then their **Account** Tab.

You will then be able to see all the K\$ information for that customer.

### 1.4 K\$ and Invoices

When you are using the Loyalty programme K\$ will appear on invoices.

When customers purchase items the amount of K\$ that they will earn is shown here.



The screenshot shows the 'Payments' screen with a 'Kitomba \$\$' tab. The 'Kitomba \$\$' tab is active, showing the following information:

|                             |         |
|-----------------------------|---------|
| Kitomba Dollars Available : | \$60.12 |
| Amount Eligible for K\$s:   | \$19.95 |

Below the table are two buttons: 'Redeem \$19.95' and 'Don't Use Kitomba \$\$'. To the right of the 'Kitomba \$\$' tab, the following information is displayed:

|                  |                |
|------------------|----------------|
| Sub Total:       | \$19.95        |
| Discount(%):     |                |
| Includes GST of: | \$2.22         |
| <b>Total:</b>    | <b>\$19.95</b> |
| Kitomba Dollars: | 2.0            |

At the bottom of the screen are buttons for 'PDF', 'Print', 'Delete', 'Commit', and 'Cancel'. The login information 'Login: Level One' is shown at the bottom right.

If the customer has more K\$ than the minimum to required to begin redeeming, then a new tab "**Kitomba \$\$**" will show up. This has the options for redeeming K\$.

## 1.5 Loyalty Programme Reports

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Kitomba™ Dollars will be shown in the following reports:

- Business summary
- Sales analysis

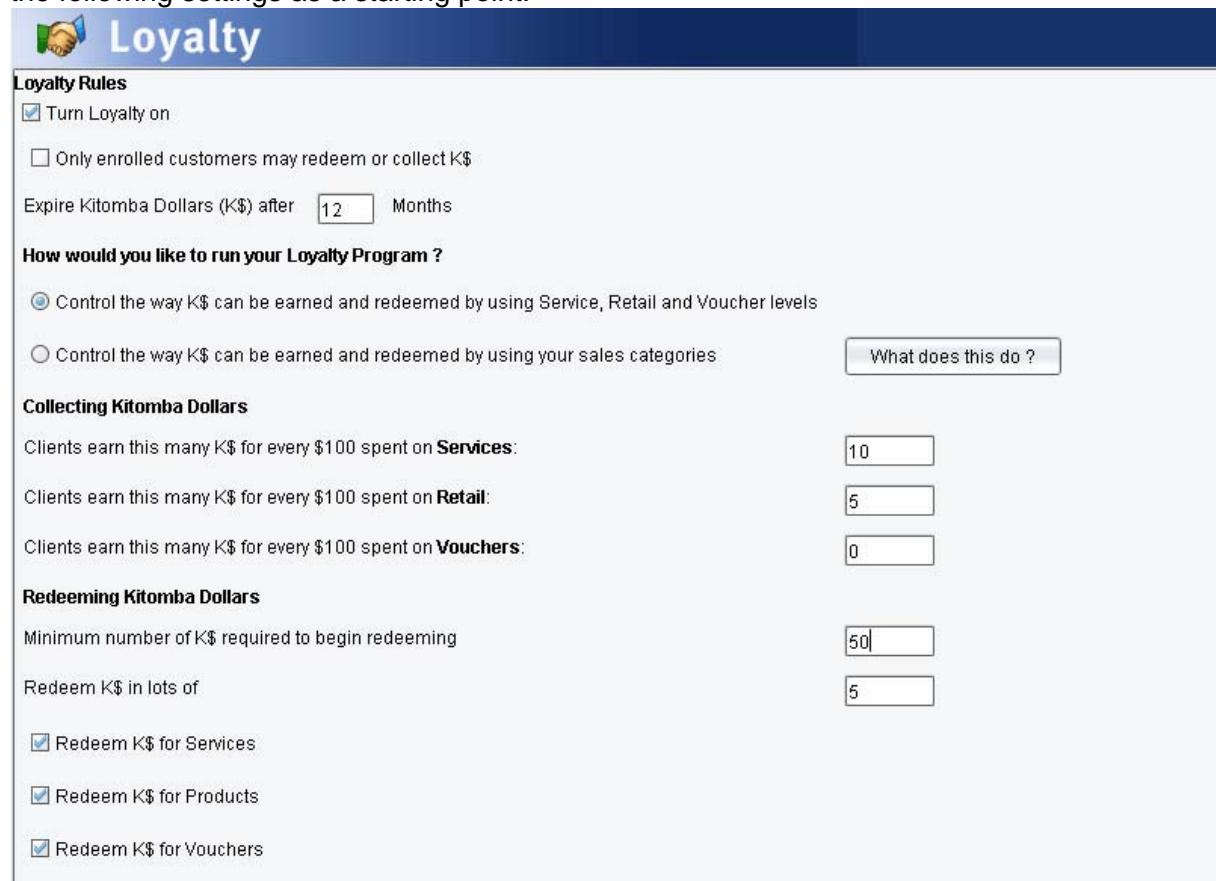
These reports will show the amount of Kitomba™ Dollars redeemed for the chosen period, the amount will be deducted from the total to balance out takings for the period.

## 1.6 Suggested settings

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Your K\$ loyalty programme is an extremely powerful and useful tool for retaining customers. We strongly suggest you spend the time to think about how it should be configured to best suit your business and your customers.

If you haven't got time to do this now but want to get up and going quickly then we suggest the following settings as a starting point.



The screenshot shows the 'Loyalty Rules' configuration page. At the top, there is a blue header with a 'Loyalty' logo. Below the header, the page is titled 'Loyalty Rules'. The settings are as follows:

- Turn Loyalty on
- Only enrolled customers may redeem or collect K\$
- Expire Kitomba Dollars (K\$) after  Months
- How would you like to run your Loyalty Program ?**
  - Control the way K\$ can be earned and redeemed by using Service, Retail and Voucher levels
  - Control the way K\$ can be earned and redeemed by using your sales categories
- Collecting Kitomba Dollars**
  - Clients earn this many K\$ for every \$100 spent on **Services**:
  - Clients earn this many K\$ for every \$100 spent on **Retail**:
  - Clients earn this many K\$ for every \$100 spent on **Vouchers**:
- Redeeming Kitomba Dollars**
  - Minimum number of K\$ required to begin redeeming:
  - Redeem K\$ in lots of:
  - Redeem K\$ for Services
  - Redeem K\$ for Products
  - Redeem K\$ for Vouchers

**With the options set to the suggested settings above:**

### Customer One

Customer One comes in and spends \$50, 8 times a year on services. With the points set to expire after 12 months and the minimum number K\$ to start redeeming set at \$50, they will earn 40 K\$ per year and will never earn enough K\$ to be able to redeem them.

### Customer Two

Customer Two comes in and spends \$75, 8 times a year on services. After paying for there first 7 visits they will be able to redeem 52.5 K\$ on there next purchase.