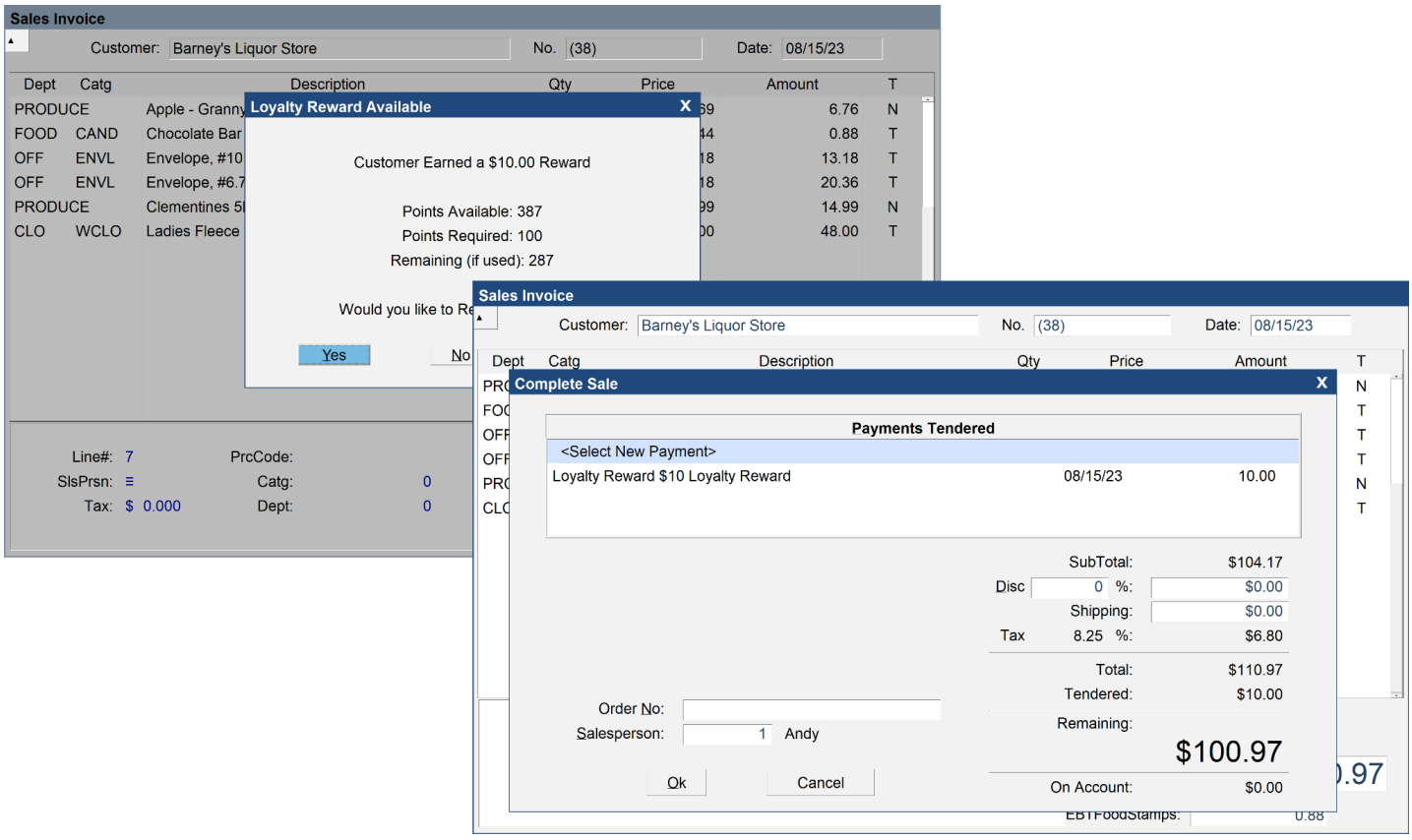
Keystroke Loyalty Rewards - Quick Start Guide

Ready to get started with Keystroke Loyalty? This customizable feature helps the merchant create and manage a rewards program that will drive sales and improve customer retention to create long lasting relationships! Customers “Earn” points by making purchases and then “Redeem” those points on future purchases. Participation in many vendor reimbursement programs can be tracked.

Keystroke Loyalty is a built-in system available to all licenses that include the latest version of Keystroke.

Points can be “Earned” and “Redeemed” based on either “Dollar Based” (total price) and/or “Quantity Based” (number of items) rules.

Example of Dollar Based setup (Spend $100, Get $10):



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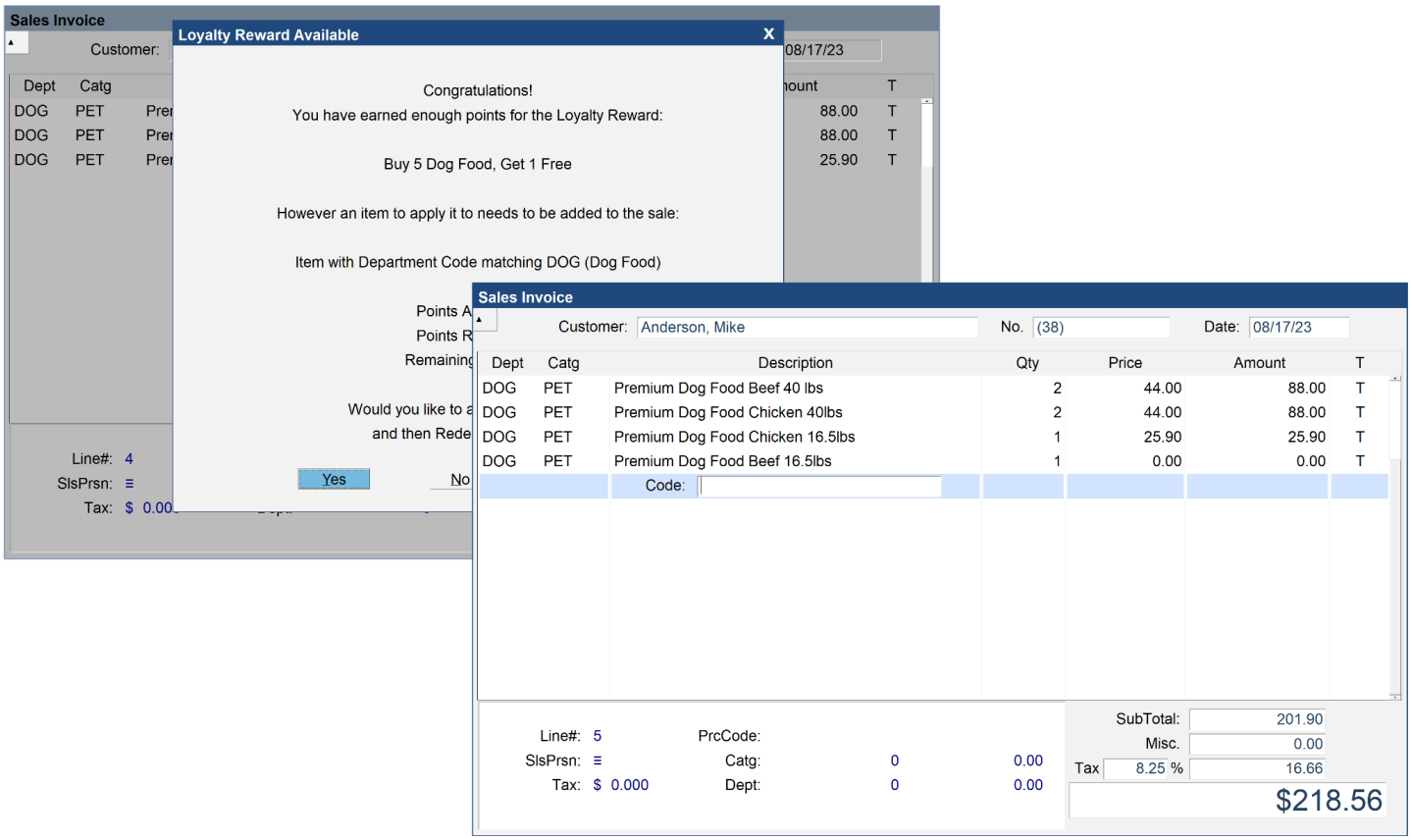
Example of Quantity Based setup (Buy 5 Dog Food, Get 1 Free):



Setting up a "Dollar Based" Loyalty Reward *(See Page 7 for "Quantity Based" Setup)*

To learn how Keystroke Loyalty works, start by setting up a simple "Dollar Based" rule.

Loyalty Payment Type:

Since this rule will use a payment type to receive the reward, first make sure the Sales Payments List has the proper payment type available. Use the "Sales Payment Types" function (under the Tables menu in the Configuration Manager) to view the current payments list. If there is not already a payment for redeeming loyalty points on the list, then one should be added. Highlight the location on the list where the new payment should appear. Then use the [Insert] key to add a new payment. See an example of a suggested payment type named "Loyalty Reward" on the next page.

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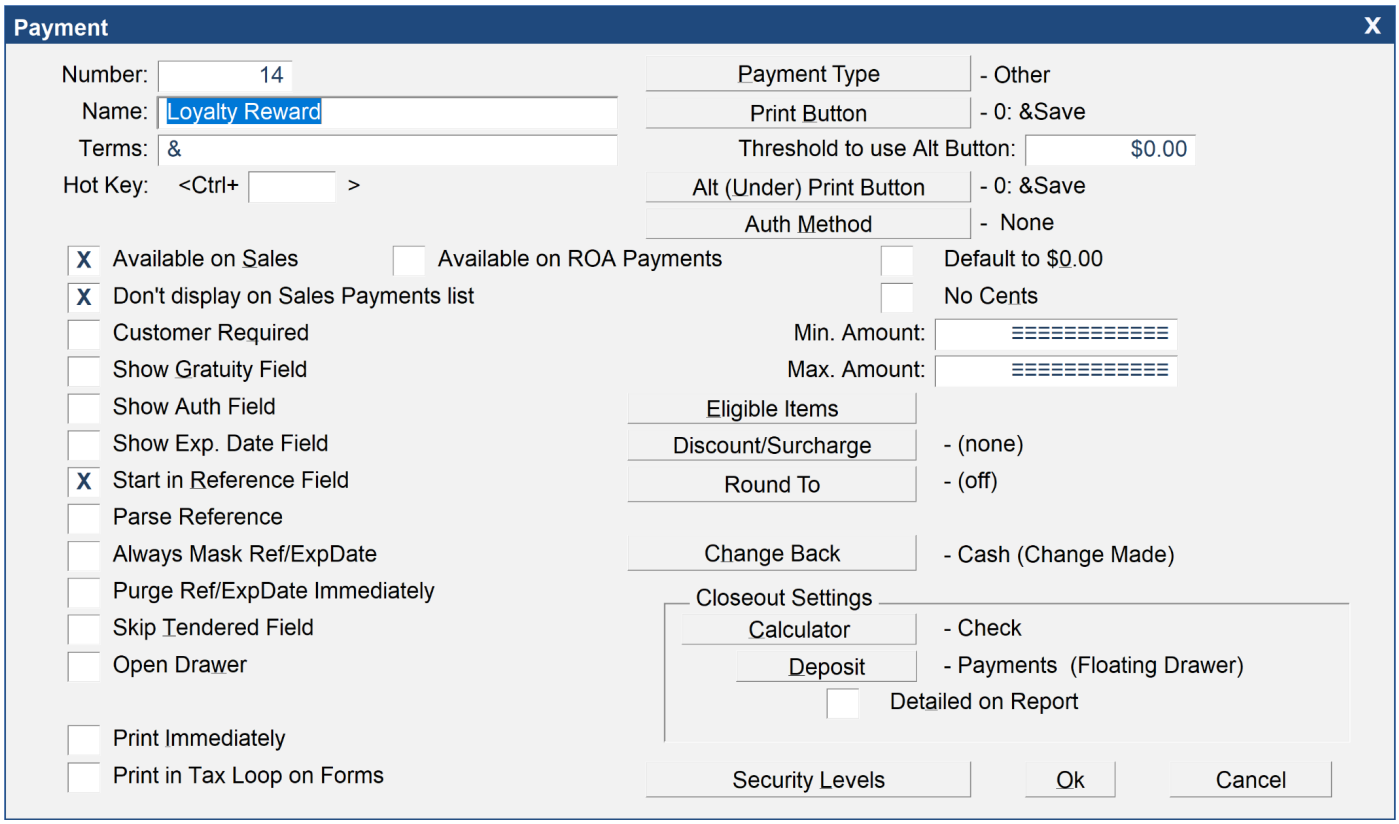
Below is an example of a suggested payment type named “Loyalty Reward”.



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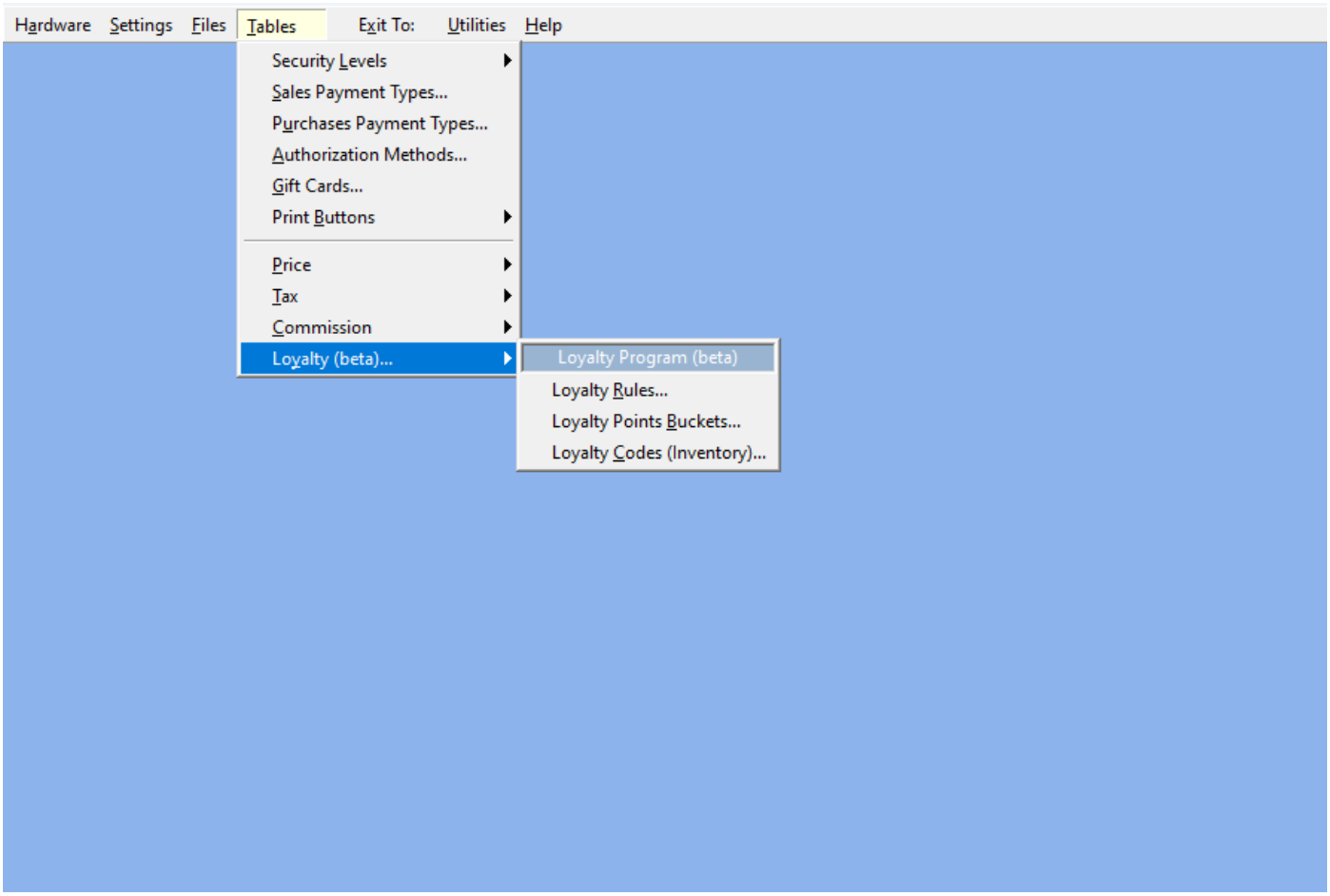
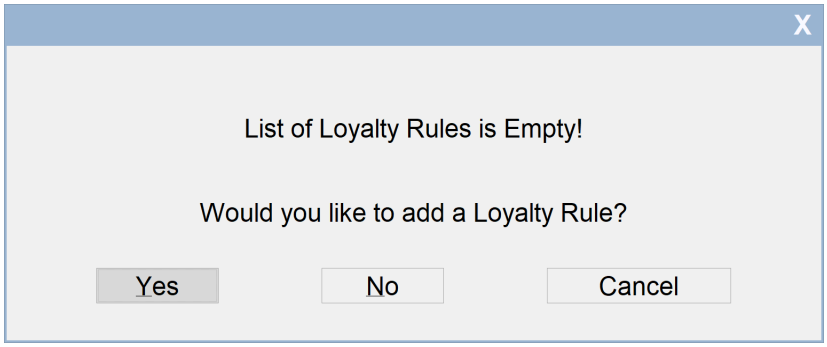
The Loyalty program is set up in the Configuration Manager, under Tables - Loyalty.



Select Loyalty Rules from the Loyalty menu. The following message will appear if a Loyalty Rule has not already been created:



Select “Yes” to continue. Then press Enter on the “Default Loyalty Points Bucket (*)” to add and configure the Loyalty Rule. Give the new Loyalty Rule a **Rule Name:** (e.g., “$10 Loyalty Reward”).

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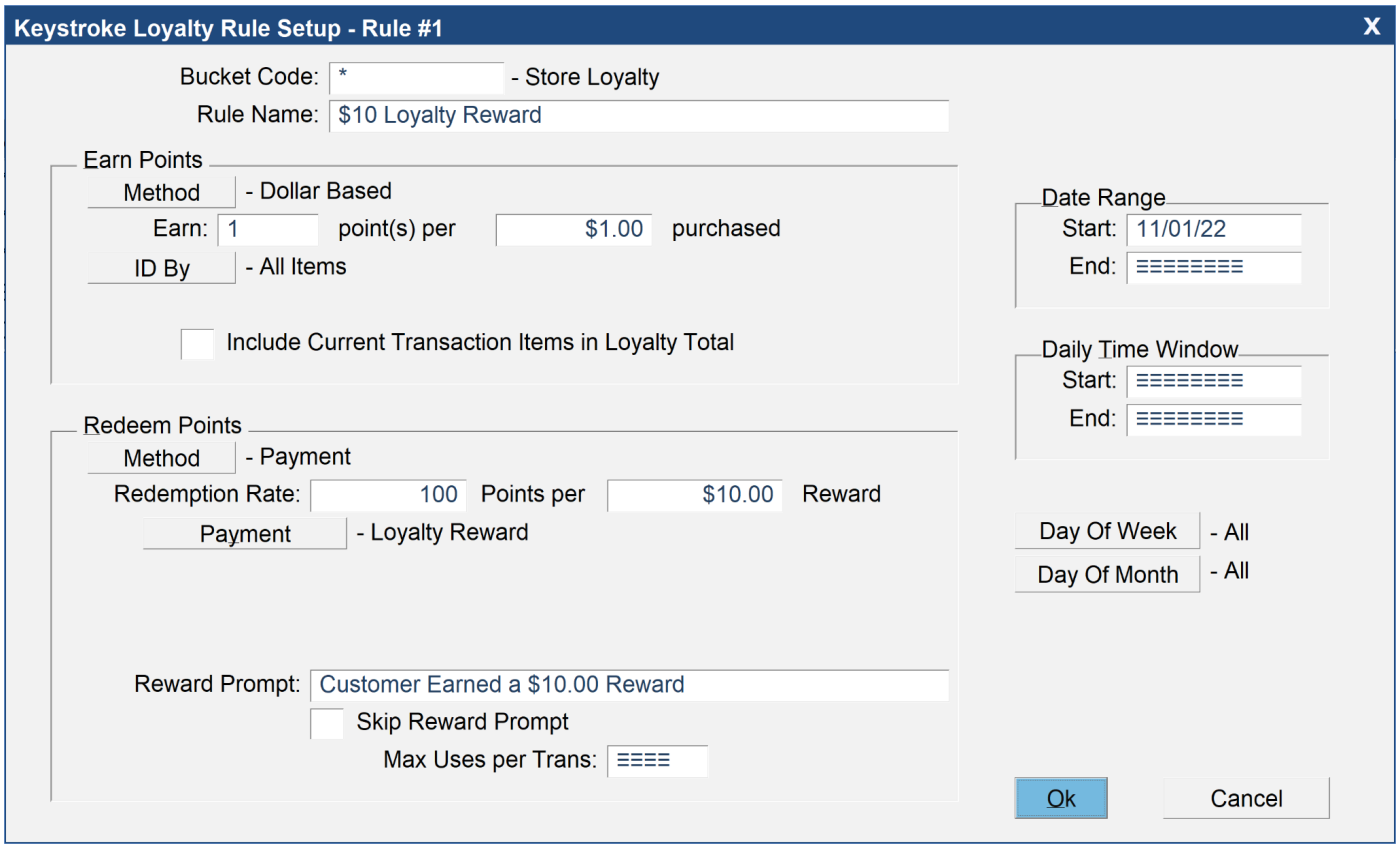
Earn Points: Use the “Earn Points” section to define the number of Points Earned and the dollar amount required to earn those points (e.g. Earn 1 point per $1.00 purchased). Leave the “ID By” set to “All Items” so all dollars spent will earn points.



Redeem Points: Use the “Redeem Points” section to define the number of Points that need to be redeemed in order to receive the reward. (e.g., Redeem 100 Points to apply a $10.00 payment). Note that the Payment button will be used to select the payment type set up on pages 2 and 3 above.

Press [F10] or Click the “X” in the upper right corner of the “Loyalty Rules” screen and then Click “Yes” to save. Congratulations on setting up your first Keystroke Loyalty Program! Now open a Customer record from the Database Manager or Sales Manager to add Loyalty to eligible Customer records.

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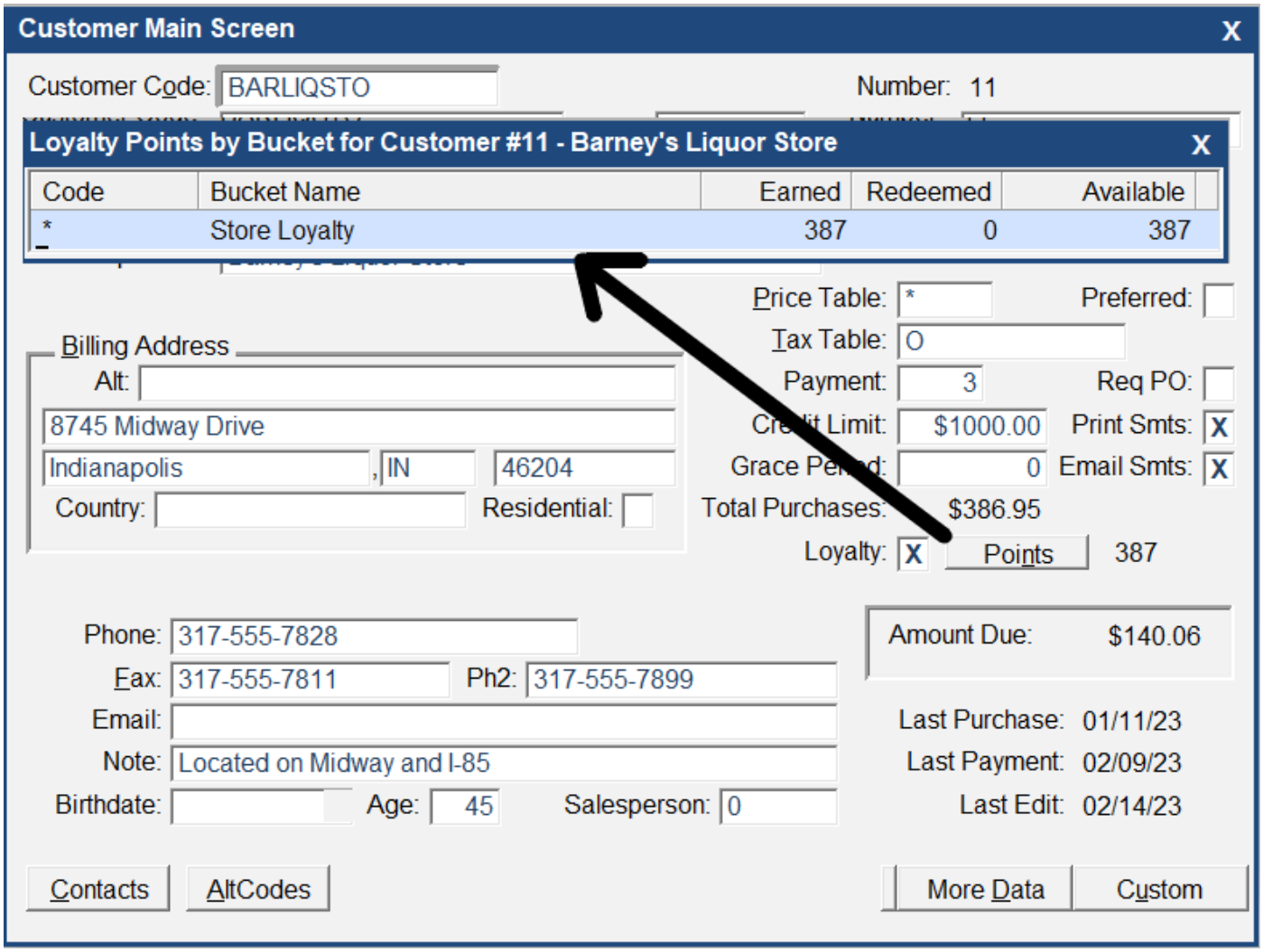
Customer Records:
By default, customers added to the Customer Database will have the Loyalty field checked (shown below). The customer record must have the Loyalty field checked to be eligible to participate in a Keystroke Loyalty program. The Points button on the customer record can be selected to view the customer's available points.



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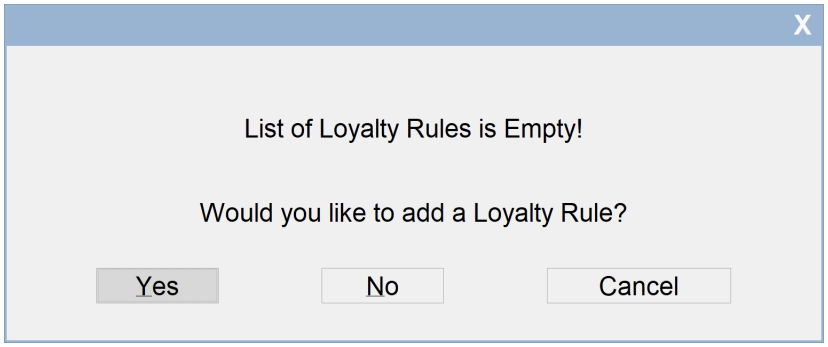
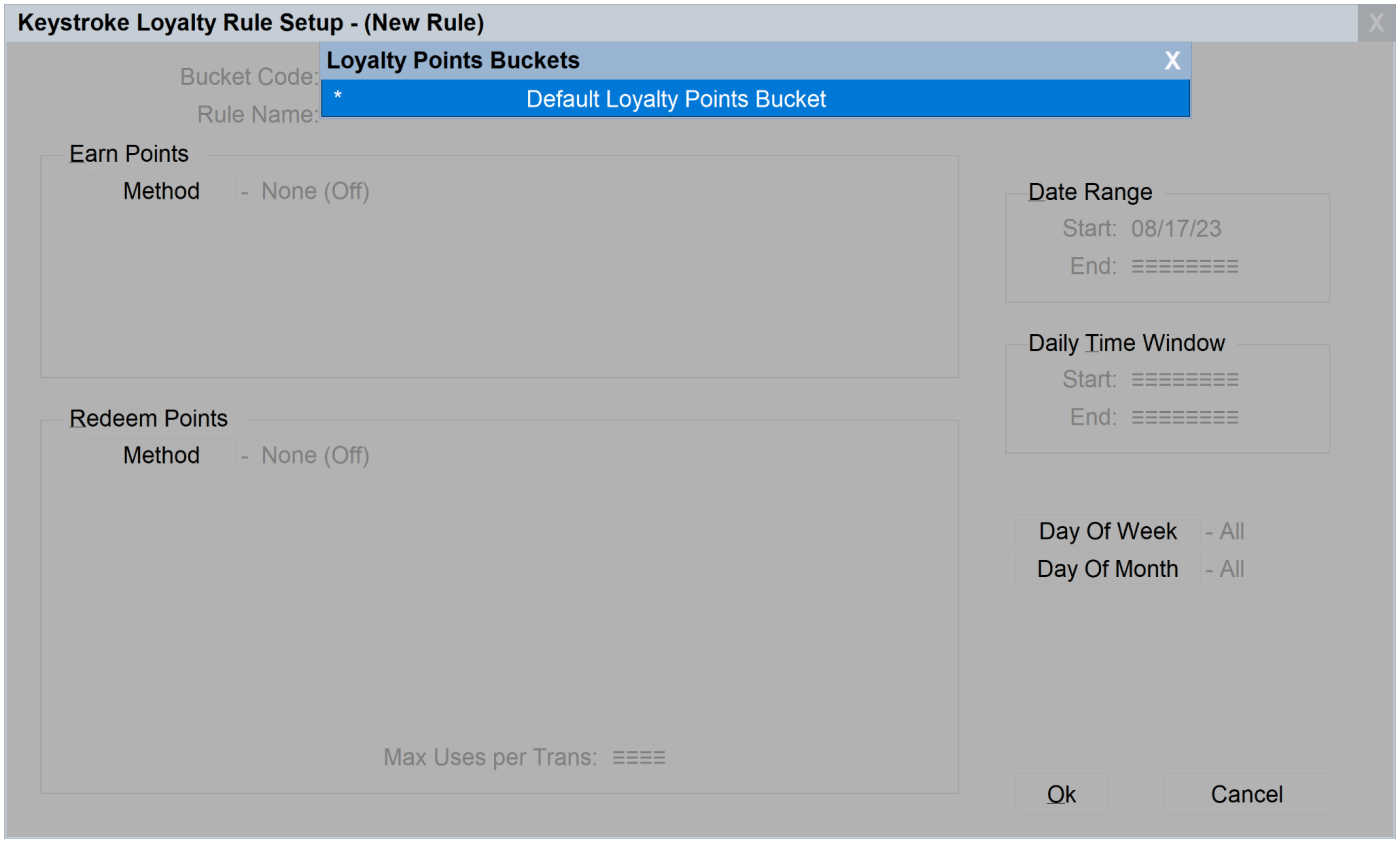
Setting up a “Quantity Based” Loyalty Reward

A “Quantity Based” loyalty rule (buy X items, get 1 item free) usually requires a specific Loyalty Code to identify inventory items eligible for gaining points and to redeem rewards. Again, the following message will appear if a Loyalty Rule has not already been created:



Next, see the * Default Loyalty Points Bucket. Press [Insert] or [F2] to add a new rule.



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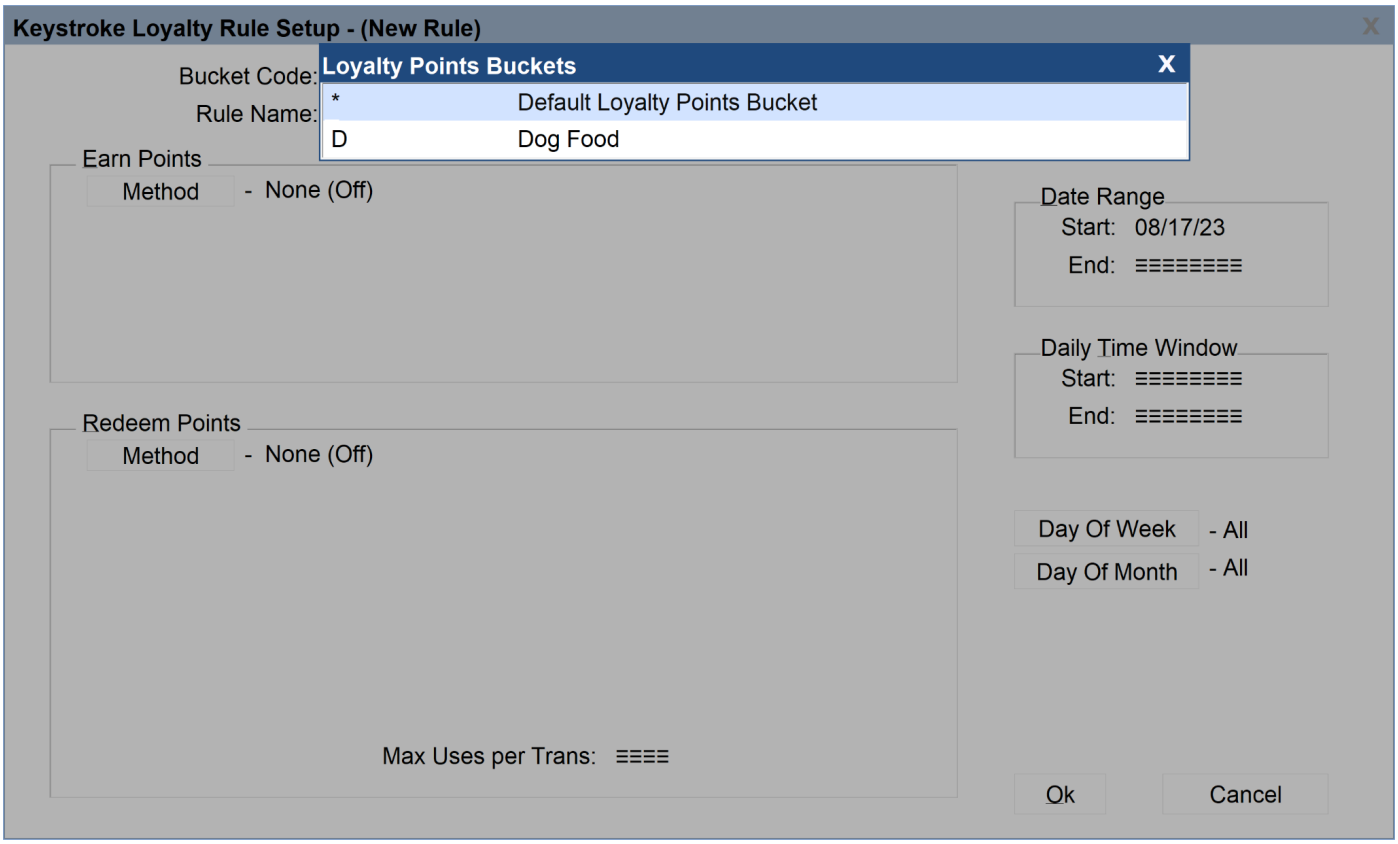
In the below screenshot, the code “D” and the name “Dog Food” was added.



Clicking Ok to save, the New Rule screen will be displayed.

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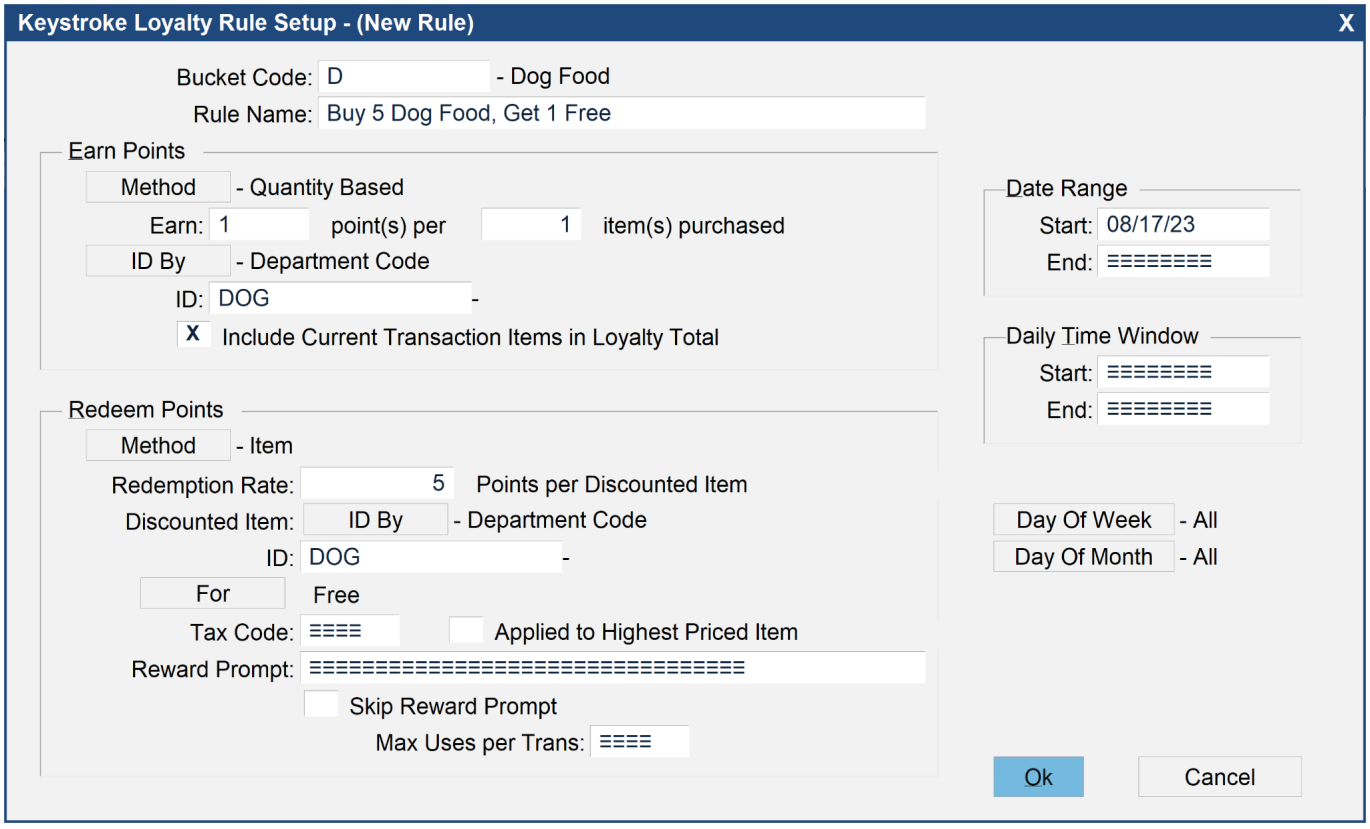
Setting up a “Quantity Based” Loyalty Reward (continued)

In the below “Quantity Based” example, set the Earn Points Method to Quantity Based and set up “Earn 1 point per 1 item purchased”. The inventory items are identified by Department = DOG. In this example, the “Include Current Transaction Item in Loyalty Total” is checked (the customer can pick out 6 Dog Food, and 1 will be free).

Now set up the Redeem Points section by setting Method = Item, and set the Redemption Rate to 5 Points. Set the Discounted Item line to be the same as above (ID By = Department Code, and the ID as DOG). Setting the “For” button to Free is the same as discounting 100% off. Other discounts include % Off, $ Off, or Fixed $ Amount Off.



Note: Loyalty Rules should not be changed or deleted once they have been used (other than for entering an End Date when needed).

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Loyalty Terminology:

Loyalty Points Buckets

As Loyalty Points are earned and redeemed they are tracked by Loyalty Point Buckets attached to each Customer. Points are Earned only when a qualifying Sales Invoice Transaction Type is saved. However, Points can be Redeemed on nearly any Sales Transaction Type. The exception to this case is if the reward is to be Redeemed as a payment and the Sales Transaction Type does not support Sales Payments (such as in the default settings for Quotes). Points are tracked using whole numbers (no fractions or decimals). While it is possible to create a Loyalty Rule that equates to a fractional value, Points are always rounded to the nearest whole number when they are Earned or are Redeemed.

Loyalty Codes

Loyalty Codes are optional since Loyalty Rules can be based on other inventory fields (available for selection from the ID By button's Lookup List on the Loyalty Rule Setup screen).

Loyalty Rules

The Loyalty Rules determine how points are earned and redeemed. Until a Loyalty Rule is created, the list of Loyalty Rules will be blank and therefore Loyalty functions are disabled.

While editing the Loyalty Rules list, rules can be copied or cut and then pasted. The Rules list can also be limited to display only rules that are valid on a particular date based on the Rule's Start and End Date fields (the default being today's date). Press <F9> to switch between all rules and current rules. Press <Ctrl+Home> to enter a particular date in the future (or the past).

Warning: If using multiple Loyalty Points Buckets, the "Include Current Transaction Items in Loyalty Total" parameter should be left OFF for Dollar Based rules. Enabling this parameter can cause conflicts if using multiple Loyalty Buckets/Rules when some Rules are Quantity Based and others are Dollar Based. If a reward is earned based on the Dollars of the current transaction and then an additional reward based on the Quantity is also earned, the Quantity Based reward can cause the dollars earned to be reduced which could cause the dollar amount to drop below what was needed to earn the Dollar Based reward. In this case, since the reward was already earned, it will not be removed. The result can be that the customer's available Loyalty Points may become a negative number.

Notes:

- Loyalty Rewards are used with the Sales Invoices and do not work well with Sales Orders.
- In MultiStore environments, the Customer Database file must be shared in real-time if Loyalty Points are to be used between different stores.

For More Information:

Use the F1 Online Help to get more information on each field displayed.

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Data Files:

- Both the LoyCodes.dat and LoyBckts.dat files are always located in the same folder as the Customer Database file.
- Loyalty Points are stored in the Loyalty Points file KSCstLoy.dat that is connected to the Customer Database file KSCst.dat. The data in the Loyalty Points file is directly related to each customer and is always stored in the same folder as the Customer Database file.
- The Loyalty Buckets file LoyBckts.dat is used to organize and identify the Rules that work together and to track Points separately for different Rule sets (which can be grouped together using Loyalty Codes).
- The Loyalty Codes are stored in the file LoyCodes.dat and are used to group inventory items for use with Loyalty Rules.
- Both the LoyCodes.dat and LoyBckts.dat files are always located in the same folder as the Customer Database file.
- The Loyalty Rules are stored in the file LoyRules.dat. This file is not created (and therefore Loyalty functions are disabled) until a rule is entered. Since the Loyalty Program system is based on customers, the default location for this file is the same as the Customer's Database file location (CustDir is the same as DataDir by default). However, if the CustDir is different from the DataDir and this file exists in the DataDir then the file in the DataDir is used (this allows individual stores to override the standard rules if needed).