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Category	BOS General
Course	AR
Version	1.0
Client	Generic
Software	2.14.100

Hints and Tips

- ✓ Refer to the [BGEN-2d Maintain a Customer Account Fact Sheet](#) to:
 - edit the account parameters
 - update name/address details
 - delete an account
 - link a secondary account to the main account; e.g. for families and businesses who want individual cards.
- ✓ If this is a secondary account (**Bill to:** is populated), retrieve the primary account to maintain the loyalty activity.
- ✓ **If a customer loses their card and you won't replace it with the same number**, you have to delete the account, & manually adjust the points balance into a new account number.
 - Before you delete the old account, write down the points from the **Loyalty** tab; if you use the **Accum. Grand Total to Date** amount, vouchers will be re-printed if the points are greater than the award level.
 - The old account, and any vouchers that had been issued, won't be recognised at POS or in the BOS once the physical deletion utility runs at the store, and Price Update applies the deletion at POS.
- ✓ **Loyalty Points Balances:**
 - **Accum Loyalty Grand to Date** is the points earned since the account was created, adjusted for any points manually added/subtracted.
 - **Loyalty Points** is the points earned toward the next voucher; this resets to zero once a voucher has been issued.

Maintain Loyalty Account Activity

You can maintain the loyalty points and vouchers awarded to a customer.

If your store is Head Office managed, check your business's policy on making changes at store level; they may be overridden once HOS Import runs overnight.

Procedure to Maintain Loyalty Account Activity

1.	From the HOS/BOS Receivables menu, select Accounts . <i>*Or click the Accounts Receivable icon.*</i>					
2.	In the Code field, type, or click , to search for the account number. <i>*The account details are displayed.*</i>					
3.	Click the Loyalty tab.					
4.	<table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">To: check the points balance of a customer</td> <td style="width: 50%;">then: refer to the Loyalty Points field. <i>*See Hints and Tips.*</i></td> </tr> <tr> <td>manually adjust the points balance of an account</td> <td>in the Adjust Points field, type the number of points you want to update the account by. <i>*Use a [-] to reduce points.*</i> Click Save. Click Yes to confirm. <i>*The Accum Loyalty Grand to Date and Loyalty Points fields are updated.*</i></td> </tr> </table>	To: check the points balance of a customer	then: refer to the Loyalty Points field. <i>*See Hints and Tips.*</i>	manually adjust the points balance of an account	in the Adjust Points field, type the number of points you want to update the account by. <i>*Use a [-] to reduce points.*</i> Click Save . Click Yes to confirm. <i>*The Accum Loyalty Grand to Date and Loyalty Points fields are updated.*</i>	
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Hints and Tips

- ✓ **If a customer loses their voucher**, there's no reprint option so you can't re-issue that voucher. Either:
 - write down the 'issued' voucher number listed on the **Loyalty** tab, and manually type it when POS prompts for the voucher number, OR
 - cancel the voucher, and adjust the points so that another voucher will be triggered in the next sale.
- ✓ Contact SUREfire Retail Support if the **Cancel Voucher** option is disabled in your system, and you want to use this option.
- ✓ To report on **credit type accounts and activity**, refer to the [BGEN-2d Maintain a Customer Account Fact Sheet](#).
- ✓ If you're a Head Officer user, loyalty maintenance is transmitted to all the store/s when HOS Export and HOS Import are next run.
- ✓ The account changes are sent down to the registers when **File Transfer/POS Import** next runs (usually every few minutes).

5.	<p>To:</p> <p>fix a customer who has a negative points value</p> <hr/> <p>cancel an issued voucher e.g. if the customer loses the voucher</p>	<p>then:</p> <p>in the Adjust Points field, type the number of points to set the balance to zero. <i>*Use a [-]; e.g. type [-][1][5] to fix negative 15 points.*</i></p> <p>Click Save.</p> <p>Click Yes to confirm.</p> <p><i>*The accumulated and current points are updated.*</i></p> <hr/> <p>select the voucher (row). Click Cancel Voucher. Click Yes to confirm.</p> <p>In the Adjust Points field, type the points that were deducted when the voucher was issued (<i>only if you want to trigger another voucher</i>). Click Save.</p>	
6.	<p>To report on:</p> <p>all account customers</p> <hr/> <p>points awarded and voucher activity between two dates</p> <hr/> <p>all accounts and their loyalty points balance from a selected date</p> <hr/> <p>accounts with purchase activity this month or the year-to-date</p> <hr/> <p>accounts ranked by their total spend between two dates</p> <hr/> <p>accounts who haven't purchased between two dates</p>	<p>then:</p> <p>select the Receivables menu -> Listing report.</p> <hr/> <p>select the Reports menu -> Loyalty -> Loyalty-Frequent Shopper Points Audit report.</p> <hr/> <p>select the Reports menu -> Loyalty -> Loyalty Customers Without Purchases report. <i>*Set the date to Null to return all accounts.*</i></p> <hr/> <p>select the Receivables menu -> Sales Analysis. <i>*Select Show Detail to view itemised transactions.*</i></p> <hr/> <p>select the Reports menu -> Loyalty -> Customer Purchase Analysis report. <i>*You can select a specific department or product.*</i></p> <hr/> <p>select the Reports menu -> Loyalty -> Customer Non-Purchase Analysis report. <i>*You can select a specific department.*</i></p>	
7.	<p>To:</p> <p>edit another account</p> <hr/> <p>finish</p>	<p>then:</p> <p>return to step 2.</p> <hr/> <p>click Close.</p>	