



# Poynt Loyalty Program

## Overview & Quick Start Guide



It's easy to stay loyal when loyalty is easy.

### What is the Poynt Loyalty Program?

We are ecstatic to offer merchants the Poynt Loyalty program. Loyalty programs are a must-have for merchants to boost customer satisfaction and traffic. In fact, nearly 70% of consumers modify their purchase behavior to optimize points.

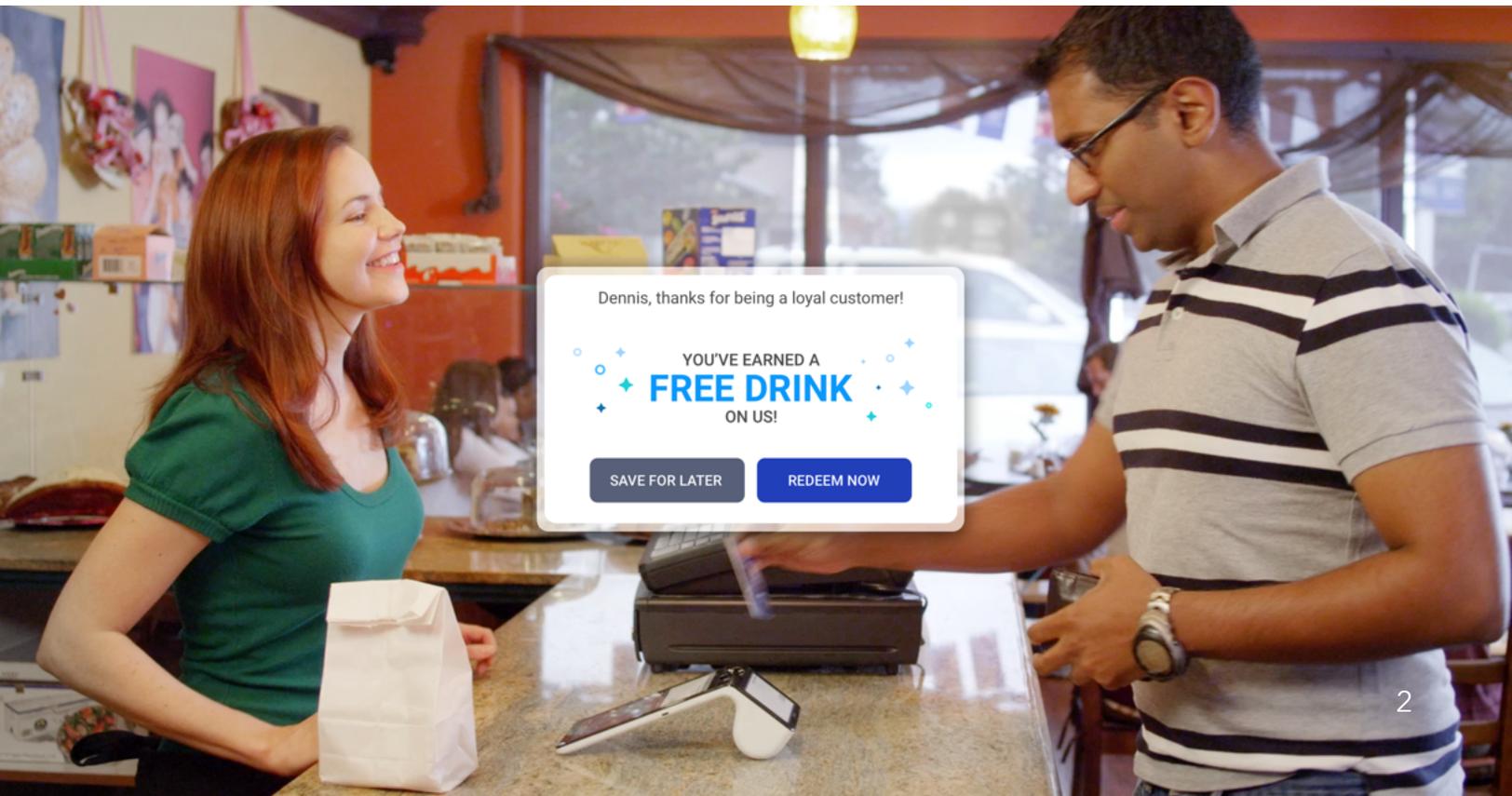
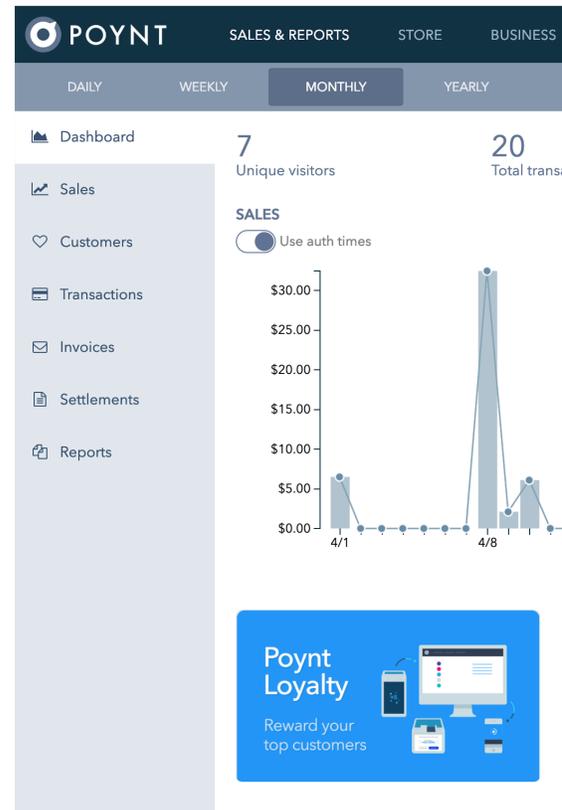
Our program is incredibly easy to use for merchants and their customers.

Customers are enrolled simply by swiping their favorite credit card, or in the case of cash, entering their mobile number. Merchants can easily track reward points on the Poynt Smart Terminal or in their Poynt HQ. Customer can track their points via their Apple Wallet or mobile web.

Ready to build a **loyal customer base**?  
Follow the instructions below.

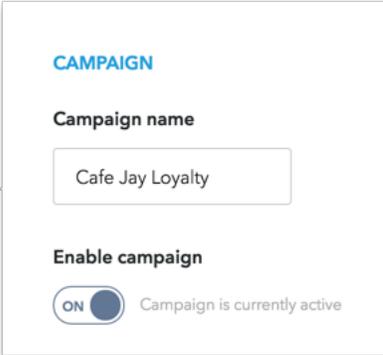
## Setting up your Poynt Loyalty Program

1. Login to Poynt HQ. Click on "Sales & Reports" on the upper header of your screen and click on the Poynt Loyalty banner at the bottom of the screen.
2. Once you subscribe, you should be redirected to Poynt Loyalty campaign management screen.



### 3. Enter campaign details.

- i. Follow the pop-up tips alongside each campaign field if you require additional clarity.
- ii. Once you have gone through all details, launch your rewards program by toggling "On" under "Enable Campaign" at the top of the screen.



**CAMPAIGN**

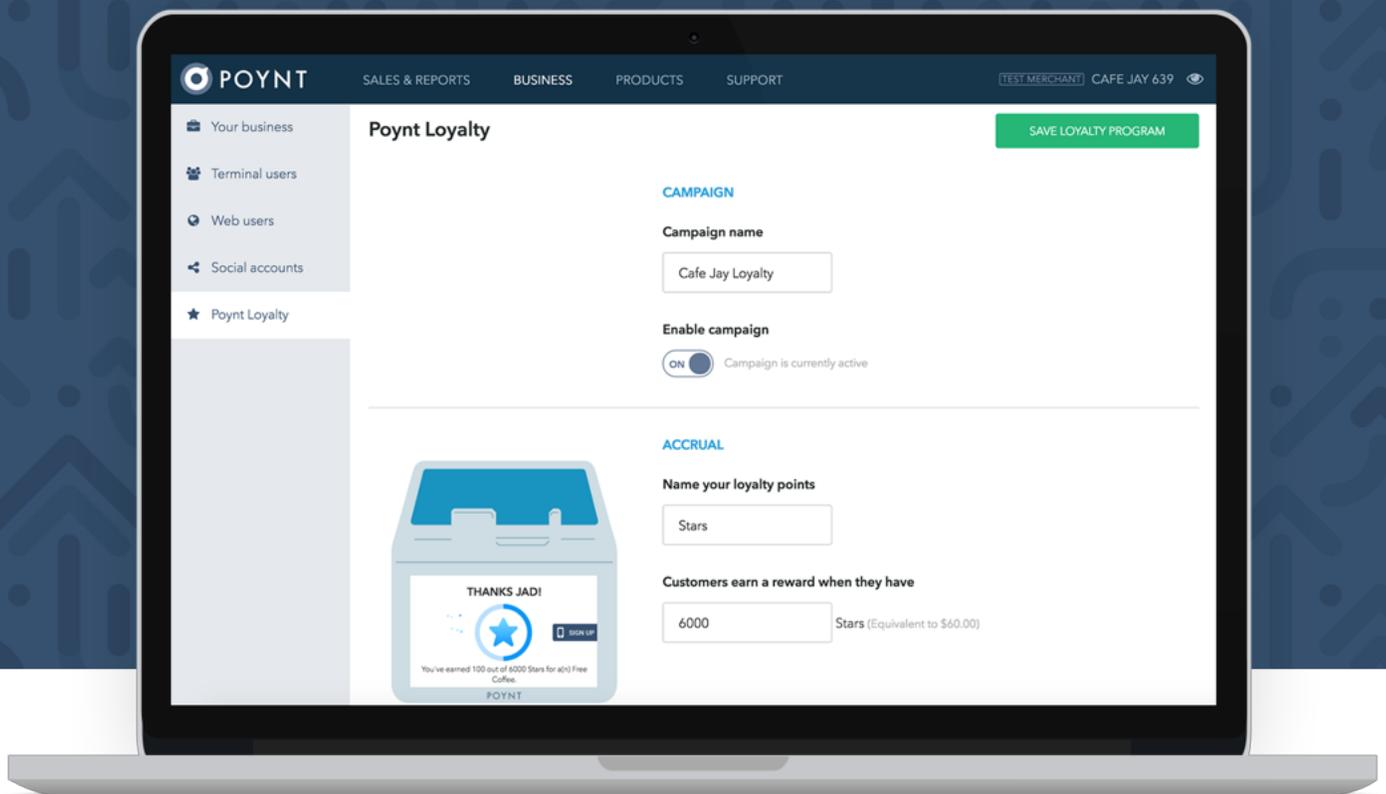
**Campaign name**

Cafe Jay Loyalty

**Enable campaign**

Campaign is currently active

### 4. You have setup your loyalty program!



POYNT LOYALTY CREATION SCREEN

# Transaction Guide

Now that you have setup your Poynt loyalty program, here are a few quick steps to ensure that you and your customers have a seamless experience.

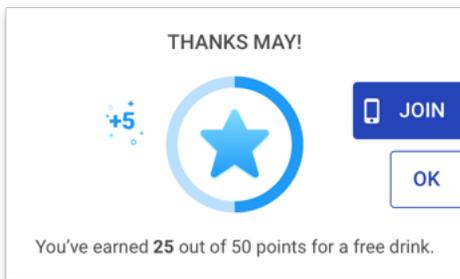
## Credit Card Transactions

### Program Setup or Regular Transaction

1. Process your transaction as usual.
2. When you are ready to accept payment, hit charge.

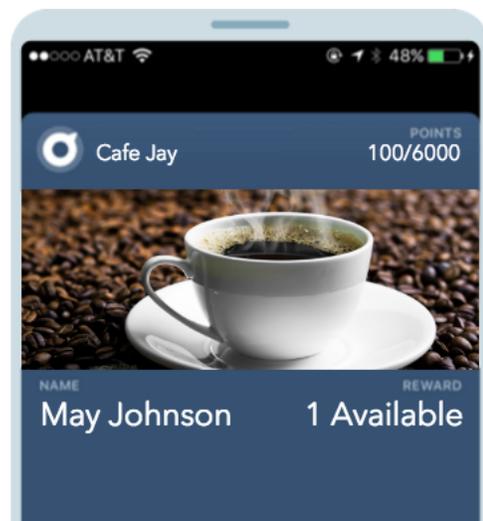


- i. The customer facing screen informs your customer that they have received a certain number of points towards your loyalty program. They have the option to "Join" or press "OK".



**Note:** While the program automatically enrolls your customer based on this particular card, if they wish to merge points across other cards or cash, they can hit "Join" and enter their phone number.

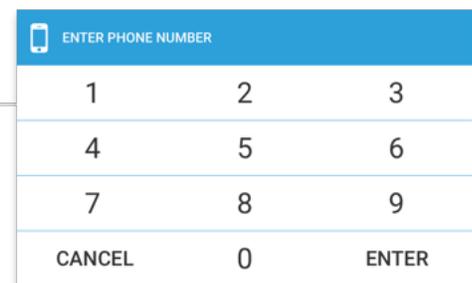
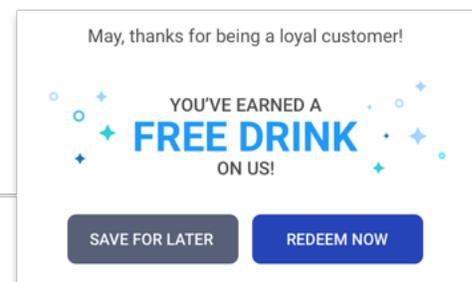
- ii. If they join the program, your customer will receive a text with a link whereby they can do one of two things; add their loyalty card to their Apple Wallet or view their card on mobile web. The former will enable them to view points balances real-time and receive location-based messages.





## Reward Redemption

1. Enter transaction amount as usual.
2. Hit charge.
3. Transact as usual.
  - i. The customer facing screen informs your customer that they have a reward available for them. They have the option to "Redeem Now" or "Save For Later."
  - ii. If they "Save for Later", transact as usual. The customer facing screen will inform them that they have accrued a certain number of points towards their loyalty reward.
  - iii. If they choose "Redeem Now" and haven't yet merged their accounts by entering their phone number, the screen will prompt them to enter their number in order to redeem their reward.
  - iv. If a balance is remaining after redeeming points, the transaction will continue as usual.



# Cash Transactions

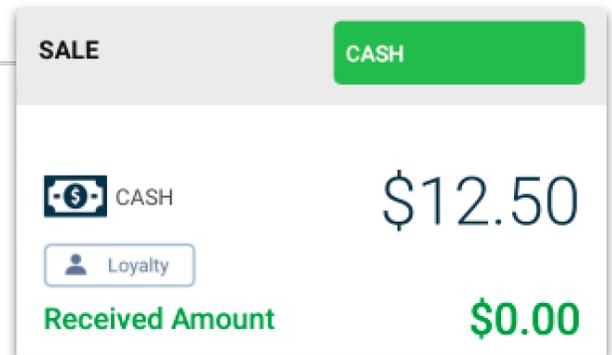
## Program Setup or Regular Transaction

1. Enter transaction amount and hit cash.



2. You should see a loyalty button on the cash screen.

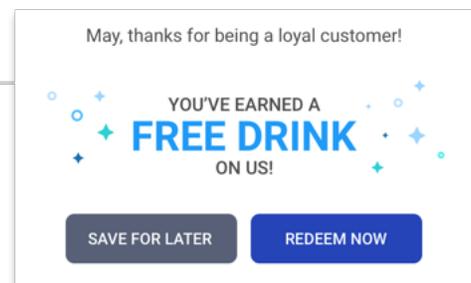
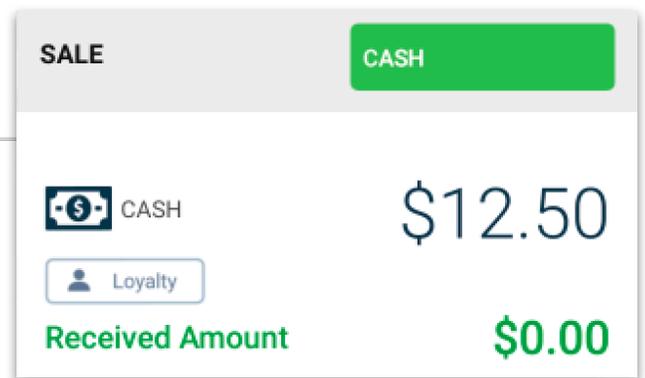
- i. Tap the button.
- ii. The customer will see a prompt for them to "Sign In" by entering their phone number.
- iii. The customer facing screen informs your customer that they have received a certain number of points towards your loyalty program.





## Reward Redemption

1. Enter transaction amount and hit cash.
2. You should now see a **loyalty button** on the cash screen.
  - i. Tap the button.
  - ii. The customer facing screen prompts your customer to "Sign In."
3. Once the customer has signed in, if they have a reward available to them, a prompt will give them to option to "Redeem Now" or "Save For Later."
4. If they "Save for Later", transact as usual.

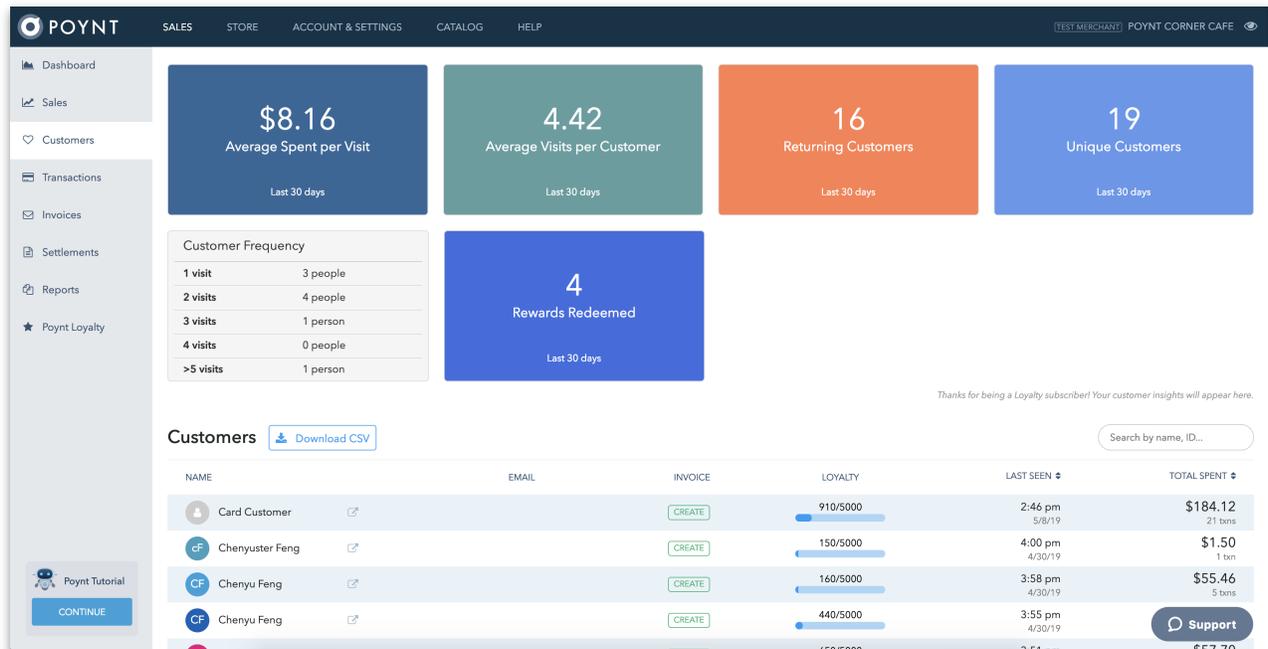


**Note:** The customer facing screen will inform your customer that they have received a certain number of points towards your loyalty program.

5. If they choose to "Redeem Now", the next screen will simply confirm their receipt choices.
6. If a balance is remaining after redeeming points, the transaction will continue as usual.

# Customer Insights

With your Poynt Loyalty subscription, you get deeper insights into your customer base to help build your business.



## Automated Marketing (Coming soon!)

1. Setup automated marketing campaigns with a click of a button.
2. Offer new customers special rewards after their first visit.
3. Send periodic offers to repeat customers so that they come back more frequently.
4. Engage with customers who have not visited your business recently.
5. View in depth campaign performance metrics.

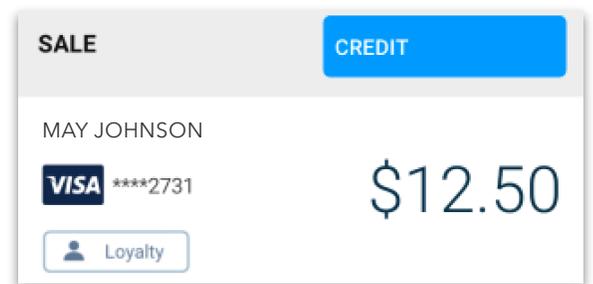
# Common Questions

## 1. How can I transfer my customer's paper rewards card points to Poynt?

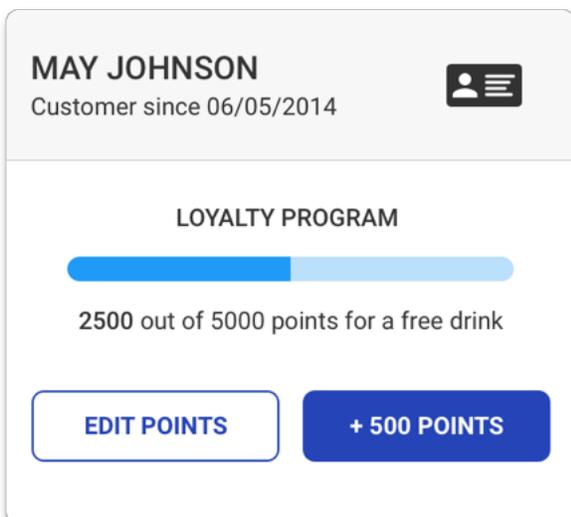
Go through the process to set up a rewards account for a customer (refer to instructions above.)

On credit transactions, you will notice a loyalty icon below the card number. Click the icon.

Once you're on the next screen, you have two options to modify and add points.



- i. Click on "Edit Points", and set a new point level.
- ii. Click on "+Number Points" and add points. The **Number** you see will be 1/10th of the number of points your campaign requires to redeem an award. For example, if your campaign setup requires a customer to earn 5,000 points in order to redeem an award, your button will read "+500 Points".



## 2. How can I view loyalty stats on any given customer in Poynt HQ?

- i. Login to your Poynt HQ account.
- ii. Click on "Sales & Reports" on the top nav bar, and on "Customers" on the left menu.
- iii. You will see your customer list (based on your filters) with high level rewards detail for each customer.
- iv. You can also click on any customer to view detailed points information.
- v. Once you click on a customer's name, click on the tab titled "Loyalty" to view points information and/or add points.

The screenshot displays the Poynt HQ interface. On the left is a navigation sidebar with options: Dashboard, Sales, Customers, Transactions, Invoices, Settlements, Reports, and Poynt Loyalty. The main area is titled "SALES & REPORTS" and "Customers". A modal window for "Chenyu Feng" (since 4/8/19) is open, showing a total spend of \$7.30 and 4 visits. Below this, there are contact details: a phone number 123 and an email address ch@poynt.co. A notification icon indicates a reminder to add 500 points for an incorrect order. The modal also features tabs for "Summary" and "Transactions", with "Transactions" currently selected. The "Transactions" tab shows a list of recent activity with columns for date, time, card type, card number, and amount. Three transactions are listed, all dated 4/10/19 at 1:02 pm, with amounts of \$1.20, \$1.50, and \$1.90 respectively.

Summary	Transactions
<b>Recent activity</b>	
✓ 4/10/19 1:02 pm	MSR **** 1003 #8f89351a \$1.20
✓ 4/10/19 1:02 pm	EMV **** 1003 #e2146721 \$1.50
✓ 4/10/19 1:02 pm	EMV **** 1003 #329c3b3a \$1.90