

Value-Added Products



TracPoint/RQ4 Integration

- Setup Instructions -

Last updated: July 2010



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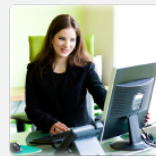
Setting up a loyalty program in RQ4 is very simple, but can vary depending on what parameters you want to set within your stores. The loyalty program works by assigning a customer identifier to a customer who is a part of your loyalty program, so they can be easily tracked.

Loyalty Program Setup

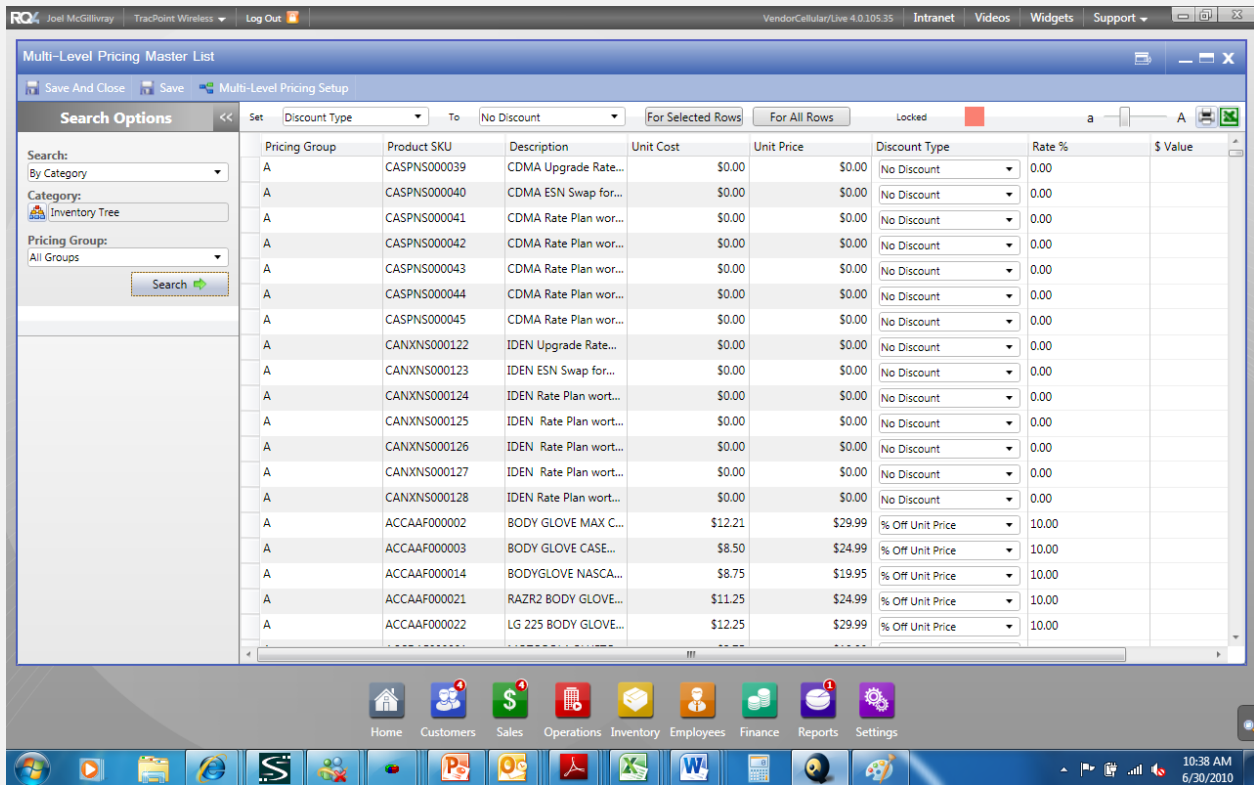
On your RQ4 dashboard, click on **Settings > Point of Sale > MLP (Multi-level Pricing) setup > MLP Setup**. You will see the screen below.

If you click on **New** you will be able to name your loyalty program and write a short description about your program.

The screenshot displays the RQ4 Settings application. The main window is titled 'Settings' and features a sidebar with navigation options: Workstation Settings, Company Settings, and Integration Setup. The 'Point of Sale' section is active, showing various setup options like POS Defaults, Coupon Setup, Bill Pay, Price Sheet Promotion, and Multi-Level Pricing Setup. A 'Multi-Level Price Setup' dialog box is open, allowing the user to create a new pricing group. The dialog includes a 'Pricing Group' dropdown menu with options 'A', 'B', 'Loyalty Program', 'Loyalty Program 2', 'Members Benefits', and 'Loyalty Program 3'. The 'Enabled' radio button is selected. Other fields include 'Description', 'Created By' (Stacy Hamer), and 'Created On' (22-Sep-2008 08:58 AM). The background shows the 'Open Items' section with 'No open items' and a taskbar at the bottom with icons for Home, Customers, Sales, Operations, Inventory, Employees, Finance, Reports, and Settings. The system tray shows the date and time as 10:27 AM on 6/30/2010.



After this, you can click on the **MLP Master List**, where you will be able to choose which products get a discount, and how much of a discount there is.

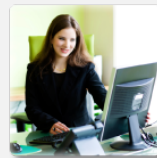


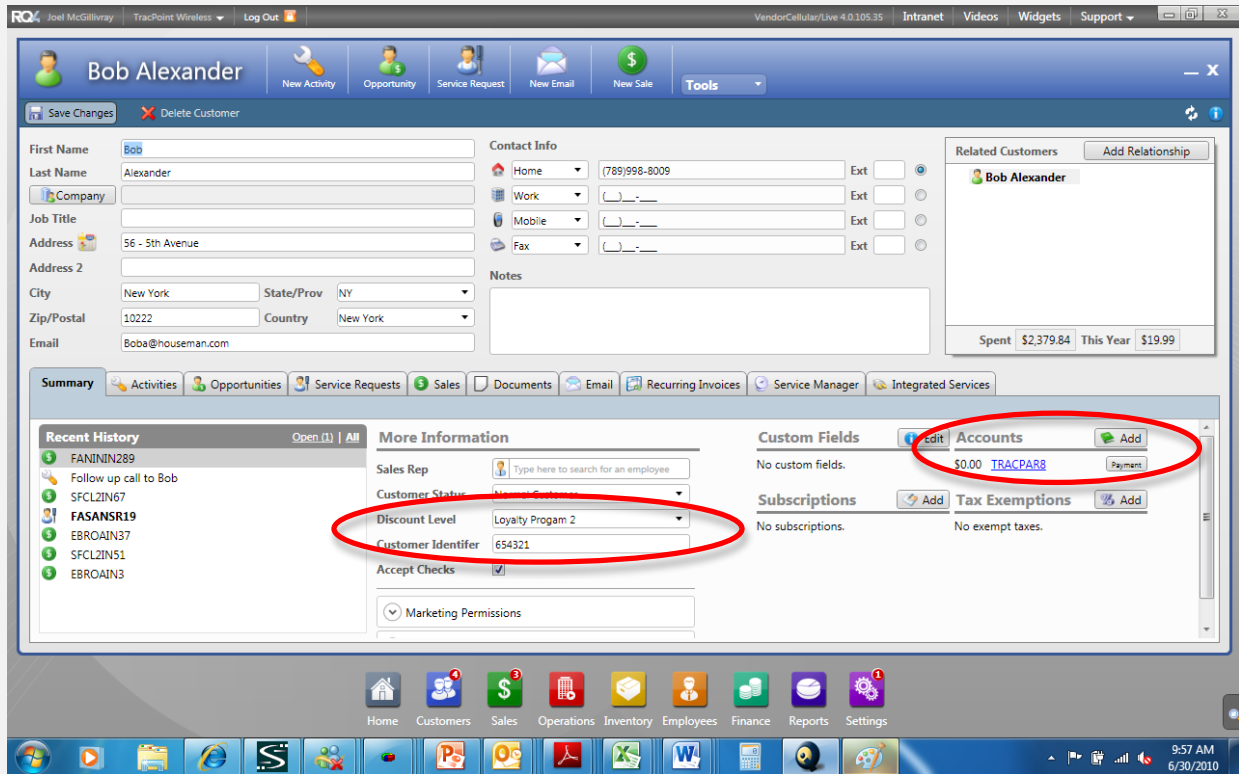
Customer Setup

After setting up the loyalty program, you will now be able to set up any customers who you would like to be part of the loyalty program.

Go into any customer you want the loyalty program to be applied to, and follow these steps:

- Create a SKU which provides the discount for your loyalty program. If you need help on creating a SKU, please refer to the RQ4 help files.
- Each loyalty card will have their own specific serialized bar code, this number should be input into the customer identifier section of a customer profile. This will make sure every single customer is individualized
- Use the discount level menu to choose the multi level pricing you set up above.



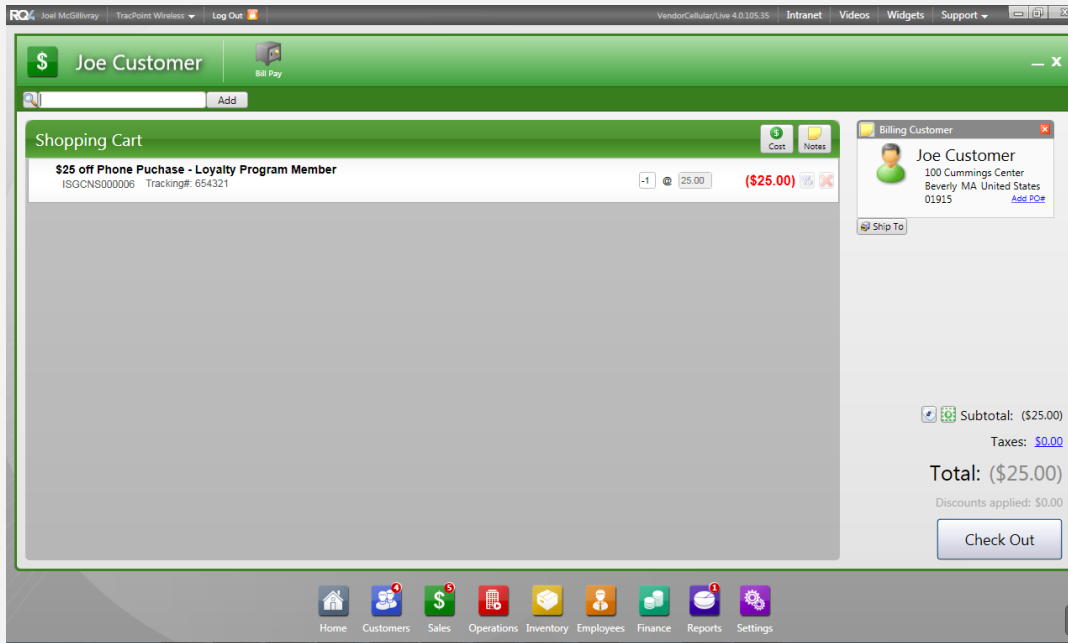


- You have to also create a new Accounts Receivable account for the customer. Any discount this customer gets will be accounted for as an account receivable. That way, this customer will be able to use this store credit next time they are in the store.

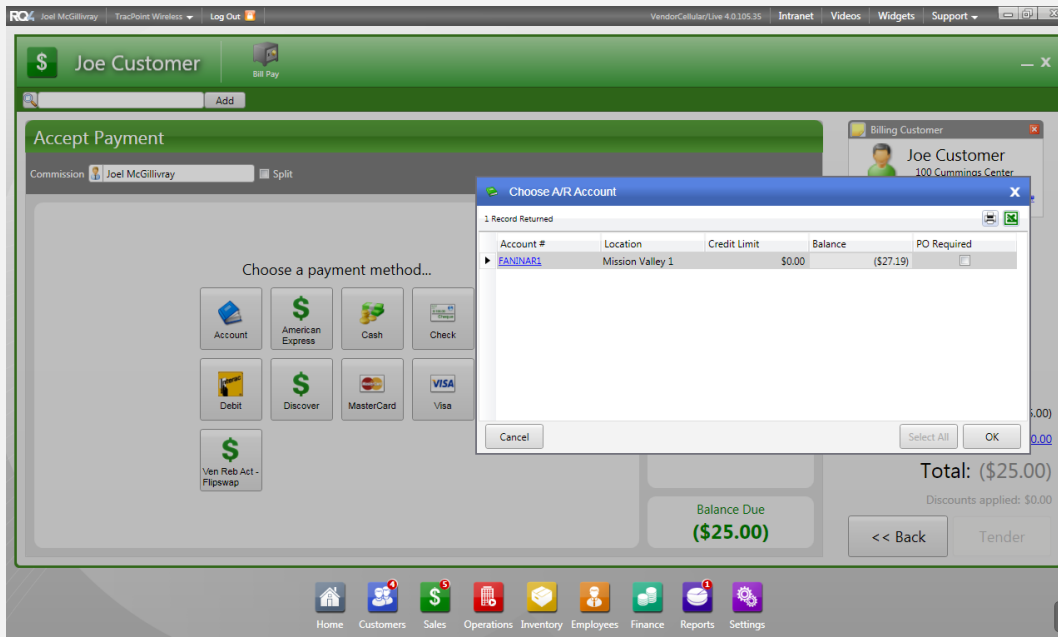
Loyalty Program at the Point-of-Sale

There are two different transactions that will need to be recorded at the point of sale. The first transaction is for the regular sale, which is done as usual. The second transaction is to redeem the key card. You will treat this as any other product. The product you will use is the SKU you created for the loyalty program. To redeem a loyalty card program, you start by ringing in a new sale, as you would with any of your products, and ring up the loyalty card SKU you created earlier.

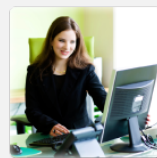


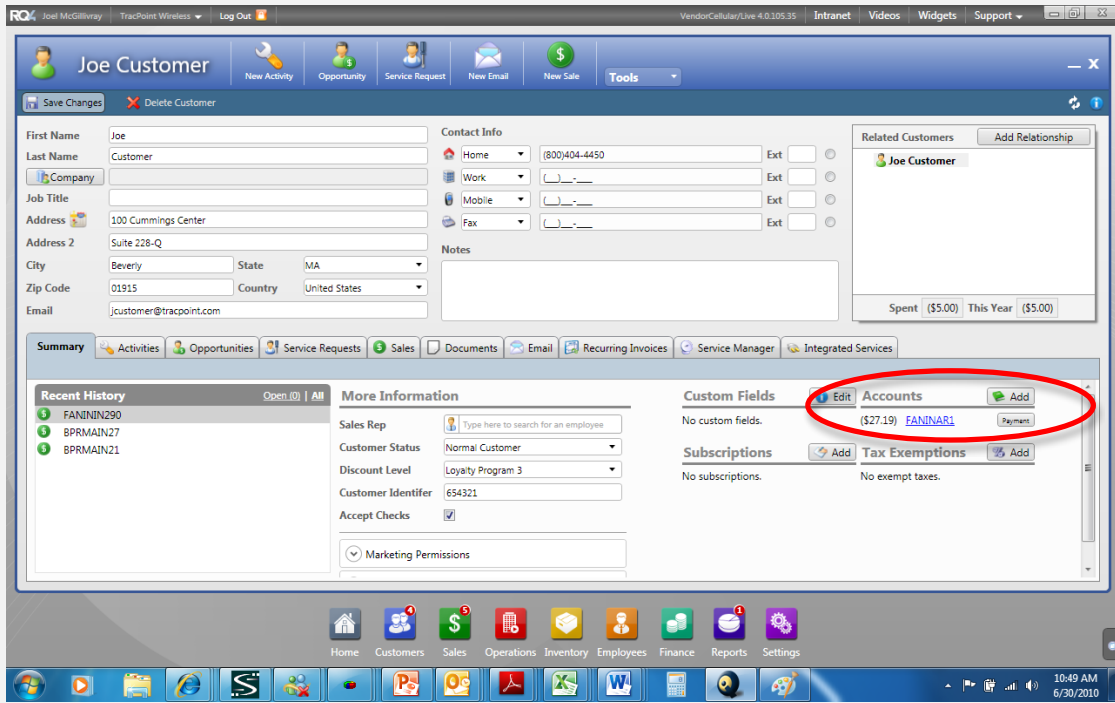


After doing this, you will see the screen above, make sure you set the quantity to “-1”. The -1 will ensure that the customer’s account is credited.



When tendering the sale, please make sure that you choose **Account** as payment method, and once the A/R account you created pops up, you can click okay, and then tender the sale.





When you click on the customer again, you will see the amount credited under the A/R account.

For any further questions, please contact:

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