

How to define loyalty program for customer collection in HDRestaurant?



HDRestaurant Tutorials

To define loyalty program for customer collection, you need to follow below steps:

1. Run HDRestaurant.
2. Click on **Set-up** button from **Restaurant Dashboard**.

The screenshot shows the HDRestaurant Restaurant Dashboard. At the top, there are buttons for 'Dine In (F5)', 'Take Away (F6)', 'Delivery (F7)', 'Pick Held Invoice', 'Awaiting Payment', and 'Table Manager'. Below these are buttons for 'Delivered', 'Delivery Failed', 'Dispatched', 'Not Delivered', 'Order Placed', 'Prepared', 'Preparing', 'Ready To Deliver', 'Ready To Pickup', and 'Ready To Serve'. A 'Set-Up' button is highlighted with a red arrow. Below the buttons is a table of orders with columns for Invoice Type, Table Number, Payment Status, Order Status, Invoice Status, Inv Number, and Invoice Date. The table contains several rows of order data. At the bottom, there is a 'Total Records : 12' label.

3. From 3rd Page of **set-up**, click on **Loyalty Points**.
4. From **Loyalty Setting** screen click on **Add New Loyalty Setting** button.

The screenshot shows the Loyalty Setting screen. At the top, there are buttons for 'Add New Loyalty Setting', 'Edit', 'Delete', 'Refresh', 'Star', 'Checkmark', and 'Close'. Below these are checkboxes for 'Show All Loyalty Settings' and 'Show Inactive Settings Only'. The main area is a table with columns for Loyalty Setting Name, Is Active, Is Default, Start Date, End Date, Referral Points, and Preference Weightage. The table is currently empty. At the bottom, there are buttons for 'Backup Database', 'Restore Database', 'Load Sample Database', 'About US', and 'Feedback'. A sidebar on the left contains various menu items like 'Loyalty Points', 'Customer Groups', 'Offers', 'Tax Management', 'Bank Accounts', 'Time Token', 'Notes', 'Round Offs', 'Daily Sales', 'Gift Cards', 'Transfer Data', 'Document Notes', 'Price Lists', 'Estimates', 'Deliveries', and 'Make Plans'. A 'Total Records : 0' label is at the bottom right.





5. In **Add New Loyalty Setting** enter the required details.

Add New Loyalty Settings

Loyalty Setting Name :

Preference Weightage :

Start Date :

End Date :

Is Default Setting : Is Active :

Use for a Customer Group :

Customer Group :

Use for a Collection :

Collection :

Referral Points : (These are the points awarded to a customer who refers other customers.)

Loyalty Points Invoice Range

1.00 in Invoice Amount = <Conversion Factor> Loyalty Points
example :
For Conversion Factor = 1
100.00 in Invoice Amount = 100 Loyalty Points
For Conversion Factor = 2
100.00 in Invoice Amount = 200 Loyalty Points

Invoice Amount Exceeding	Conversion Factor
0.00	0
0.00	0

Loyalty Points Flat Range

Additional Flat Points are awarded to customers on the invoices exceeding the specified amount.

Invoice Amount Exceeding	Flat Points
0.00	0
0.00	0

- **Loyalty Setting Name:** Enter loyalty program name.
- **Preference Weightage:** Enter preference weightage to loyalty program, so that preference for that loyalty program has been known. More the weightage, more the preference is given to the loyalty program.
- **Start Date:** This is the date from which the loyalty setting will be applicable. You can also mention the time for the Loyalty period to get to know the proper expiry period for the defined Loyalty.
- **End Date:** This is the date till which the loyalty setting will be applicable. Once the Loyalty End Period is reached the Loyalty settings will no longer be applicable.
- **Is Default:** If a Loyalty setting is set as Is Default then this loyalty setting will be applicable to any invoice made for customers who are enrolled for loyalty points, provided there is no other active loyalty setting running at that given point of time.
- **Is Active:** This option will be checked by default. Unchecking this will make the selected loyalty setting inactive.
- **Referral Points:** These are the points that will be applied to the customer who has referred the new customer to enroll for the loyalty program.
- Check the checkbox if you want loyalty points for a particular collection.
- **Collection:** Select the collection for loyalty program.





- **Loyalty Point Invoice Range:** In this section define how the loyalty points should apply to the customer.
 - **Invoice Amount Exceeding:** Enter the invoice amount after which the loyalty points are applied.
 - **Conversion Factor:** Enter the conversion factor which is used to calculate the number of loyalty points that will be given to customer depending on the invoice amount.

$$\text{Loyalty Points} = \text{Conversion Factor} * \text{Invoice Amount}$$

For E.g.: I want to give 10 loyalty point per invoice amount of 100, then conversion factor is calculated as $10/100=0.1$.

Loyalty Points Invoice Range

1.00 in Invoice Amount = <Conversion Factor> Loyalty Points

example :

For Conversion Factor = 1
100.00 in Invoice Amount = 100 Loyalty Points

For Conversion Factor = 2
100.00 in Invoice Amount = 200 Loyalty Points

Invoice Amount Exceeding	Conversion Factor
100.00	0.01
0.00	0

- **Loyalty Point Flat Range:** This is the additional points the customer will get if the invoice amount exceeds a given value. The points mentioned here will be added to the points received as per the definition in Loyalty Points Invoice Range.

For E.g.: I have defined loyalty point flat range as below. It means that if the invoice amount exceeds 100 the customer would get flat 10 loyalty points in addition to invoice range loyalty points.

Loyalty Points Flat Range

Additional Flat Points are awarded to customers on the invoices exceeding the specified amount.

Invoice Amount Exceeding	Flat Points
100.00	1
0.00	0





6. Click on **Save**.

Add New Loyalty Settings ✕ ?

Loyalty Setting Name :

Preference Weightage :

Start Date :

End Date :

Is Default Setting : Is Active :

Use for a Customer Group :

Customer Group :

Use for a Collection :

Collection :

Referral Points : (These are the points awarded to a customer who refers other customers.)

Loyalty Points Invoice Range

1.00 in Invoice Amount = <Conversion Factor> Loyalty Points

example :

For Conversion Factor = 1
100.00 in Invoice Amount = 100 Loyalty Points

For Conversion Factor = 2
100.00 in Invoice Amount = 200 Loyalty Points

Invoice Amount Exceeding	Conversion Factor
100.00	0.1
0.00	0

Loyalty Points Flat Range

Additional Flat Points are awarded to customers on the invoices exceeding the specified amount.

Invoice Amount Exceeding	Flat Points
0.00	0
0.00	0

