

How to define loyalty program for customer group in HDRestaurant?



HDRestaurant Tutorials

To define loyalty program for customer group, 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 navigation buttons for Dine In (F5), Take Away (F6), Delivery (F7), Pick Held Invoice, Awaiting Payment, and Table Manager. Below these are buttons for Change Order Status, including Delivered, Delivery Failed, Dispatched, Not Delivered, Order Placed, Prepared, Preparing, Ready To Deliver, Ready To PickUp, and Ready To Serve. A red arrow points to the 'Set-Up' button. The main area displays 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 12 records.

Invoice Type	Table Number	Payment Status	Order Status	Invoice Status	Inv Number	Invoice Date
Dine In	Table 3 - AC	Cleared	Order Placed	Saved	Hyp-100011	15/03/2017 11:38 AM
Home Delivery		Cleared	Order Placed	Saved	Hyp-100010	14/03/2017 05:29 PM
Dine In	Table 1 - AC	Cleared	Order Placed	Saved	Hyp-100009	14/03/2017 03:20 PM
Home Delivery		Awaiting Payment	Order Placed	Saved	Hyp-100008	14/03/2017 01:31 PM
Dine In	Table 5 - Non-AC		Order Placed	Held		14/03/2017 11:48 AM
Take Away		Pending	Order Placed	Saved	Hyp-100007	13/03/2017 02:34 PM
Home Delivery		Cleared	Order Placed	Saved	Hyp-100006	13/03/2017 02:32 PM
Take Away		Cleared	Order Placed	Saved	Hyp-100005	13/03/2017 12:43 PM
Take Away		Cleared	Order Placed	Saved	Hyp-100004	13/03/2017 12:39 PM
Home Delivery		Cleared	Order Placed	Saved	Hyp-100003	13/03/2017 11:13 AM

3. Go to **3rd** Page of the Set-up and select **Loyalty Point** icon.
4. From **Loyalty setting** window click on **Add New Loyalty Setting**.

The screenshot shows the Loyalty Setting window. On the left, there are navigation icons for 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. The 'Loyalty Points' icon is highlighted with a red arrow. The main area displays a table for Loyalty Setting Name, Is Active, Is Default, Start Date, End Date, Referral Points, and Preference Weightage. The table is currently empty.

Loyalty Setting Name	Is Active	Is Default	Start Date	End Date	Referral Points	Preference Weightage
----------------------	-----------	------------	------------	----------	-----------------	----------------------





5. This will bring the below screen of **Add New Loyalty Settings**.

Loyalty Setting Name : Loyalty Settings

Preference Weightage : 1

Start Date : 10/03/2017 00:00:00

End Date : 10/03/2017 23:59:59

Is Default Setting : Is Active :

Use for a Customer Group :

Customer Group : Privileged Customers

Use for a Collection :

Collection :

Referral Points : 1 (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	0.01
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

Save Cancel

- **Loyalty Setting Name:** Enter any Name for Loyalty program.
- **Preference Weightage:** Enter the preference weightage for 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 program 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 program.
- **End Date:** This is the date till which the loyalty program 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.
- **Use for a Customer Group:** Check the checkbox if you want loyalty points for a particular customer group.
- **Customer Group:** Select the customer group for which you want to give loyalty points.
- **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.

*Loyalty Points= Invoice Amount * Conversion Factor*

- **For E.g.:** I want to give 1 loyalty point per invoice amount of 100, then conversion factor is calculated as $1/100=0.01$. This would mean if the customers invoice amount exceeds 100 he will receive loyalty points.

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 [Close] [Help]

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	0.01
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
100.00	1
0.00	0

Save **Cancel**

