

# iQRetail



A Kerridge Commercial  
Systems Company



# IQ LOYALTY

## ENTERPRISE, BUSINESS, POS

**OneOne, Token Group,  
Cashback Word, Topshopper,  
Innervation Loyalty & Offline Loyalty**

## **IQ LOYALTY**

### **INTRODUCTION**

Customer loyalty is the key objective of customers' relationship management and describes the loyalty which is established between a customer and companies, products or brands. Great attention is therefore given to marketing and customer service to retain the current customers. Companies use loyalty companies that reward loyal customers for repeat business.

There are five loyalty companies IQ integrates with OneOne, TokenGroup (Box Loyalty), Cashback World, Topshopper, and Innervation Loyalty. IQ has its own Offline Loyalty.

The integration with Loyalty companies is done by means of web service calls, at time intervals during the processing of a sale or refund.

Each one of the mentioned loyalty methods will be explained separately.

### **ONEONE (INFINITY) LOYALTY**

The OneOne Loyalty and IQ integration provides a rewards program in South Africa and Namibia off a tried and tested technology platform, with the necessary skills to build a viable and sustainable rewards program and to structure and drive campaigns and dialogue to continually surprise and delight the customer.



### **ONEONE CONTACT DETAILS**

The Registered Business Partner must contact ONE|ONE contact Centers to become a merchant with ONE|ONE.

The End User must contact the IQ Business Partner (Reseller) and make an appointment together with ONE|ONE for the installation and setup.

Contact Centre: 0861 663 111

International: +2721 946 4920

Namibia: +264 61 256 061

Email: sales@one1.co.za

Website: www.one1.co.za

South Africa: 086 575 0949

Namibia: +264 61 256 621

Contact Centre Hours:

Weekdays: 7:30am – 4:30pm



## TOKENGROUP LOYALTY BOX

The Loyalty Box is the name of Token Group's Merchant Management platform. It is a combination of world-class technology, backed by a professional support team ensuring that your program is a success.



IQ Integrate with the TokenGroup Loyalty Box, enabling users to provide a few Customer Loyalty features by integrating with Token Group Loyalty solutions. This is done by means of web service calls at time intervals during the processing of a sale or refund. It allows the user to setup different earning and redemption rules per set of customers. It allows multiple store locations to connect under one umbrella and card holders across all stores immediately.

The user can set triggers based on customer purchase behaviours that will activate customised reward and transaction messages.

## TOKENGROUP CONTACT DETAILS

The user has to contact TokenGroup Loyalty Box at:

Contact Centre: 086 186 536

International: +2710 020 0601

Email: support@Tokengroup.co.za

Website: www.theloyaltybox.com

## INNERVATION LOYALTY

IQ Retail integrated with Innervation to provide the user with a Loyalty solution.



Innervation can process in South Africa, Namibia, Botswana, Lesotho and Swaziland, with expansion plans into other South African Development Countries.

The Registered Business Partner must contact Innervation contact Centers to become a merchant.

The End User must contact the IQ Business Partner (Reseller) and make an appointment together with Innervation for the installation and setup.

Loyalty forms part of Innervation's comprehensive customer engagement offering. Their customer engagement solutions enable retailers to build real, meaningful relationships with their customers by utilising sales and payment data to optimise the customer experience and grow revenues.

This offering also includes: Gift Card, Virtual Vouchers, Shopper Marketing, Insights, and Electronic Receipting.

## INNERVATION CONTACT DETAILS

Contact Centre: 086 112 2267

International: +27 011 290 9930

Email: info@inrewards.co.za

Website: www.inrewards.co.za

Gauteng, South Africa



## TOPSHOPPER

IQ Retail integrated with Topshopper to provide a loyalty service.

The Registered Business Partner must contact Topshopper contact Centers to become a merchant.

The End User must contact the IQ Business Partner (Reseller) and make an appointment together with Topshopper for the installation and setup.

Topshopper does not require registration and does not have a web service.

All that is required is a text file export.



## SPECIFICATIONS

1. TopShopper requires a copy of a receipt (txt) format on the POS till as a Sale is completed. The file must be dropped on the actual POS client machine.
2. TopShopper clears the folder once the receipt has been grabbed and uploaded.
3. TopShopper uploads the receipt in a compressed file to a secure Online API call, which can be added to local network security settings and firewalls.

## WHAT DOES TOPSHOPPER DO WITH THE BASKET?

TopShopper has secure API interfacing, which receives the Mobile Number, along with the Receipt data. The data is compressed and zipped, to ensure minimal data requirements. Each data packet is less than 2kb. On the API/Server side, the data is extracted, reformatted via our intelligent Cloud Template Engine (to represent the till slip data in its original format), and stored in a secure online Azure Cloud App Services / MS SQL Server environment.

## FILE CONTENT REQUIREMENTS:

A copy of the receipt to be placed as a txt file inside a "Pickup" folder, to be used for interception by the TopShopper Client Application. The ideal format is to be exact copy of the printed file (similar tabs, spacing and layout)

## REQUIRED FILEDROP FOLDER SETUP:

1. Create a Local Folder  
C:\ProgramData\TopShopper
2. Place copy of transaction in specified format inside the folder, as the POS prints the sales receipt
3. TopShopper will intercept all files and clear the folder.

## FILE NAMING REQUIREMENTS

The file should be named according to the Invoice/Reference Number

Example: INV1234.txt

## TOPSHOPPER CONTACT DETAILS

Email: [salesdesk@topshopper.net](mailto:salesdesk@topshopper.net) or [Support@topshopper](mailto:Support@topshopper)

[www.topshopper.co.za](http://www.topshopper.co.za)

Office Hours: Monday to Friday: 9:00 – 17:00

## CASHBACK WORLD

IQ integrates with Cashback World loyalty. Currently, the client will only be able to accumulate points on their loyalty.



Cashback needs to provide the end-users or client with a 'Dealer Unique ID' number.

If the client has a firewall or proxy server, it can be configured by clicking on the 'Enable Proxy' option.

## CASHBACK WORLD CONTACT DETAILS

The user has to contact Cashback on Myworld:

Telephone: +27 (11) 044 9101

Email: [partner.za@myworld.com](mailto:partner.za@myworld.com)

Office Hours: Monday to Thursday 9:00 – 16:00 Friday 8:30 – 14:00

## DID YOU KNOW?

72% of Customers will buy from a retailer with a loyalty program over one without.



### REGISTER LOYALTY MODULES

This module is an add-on module that requires additional licencing and registration.

You will only get access to the Loyalty Partner when you have received the additional registration.

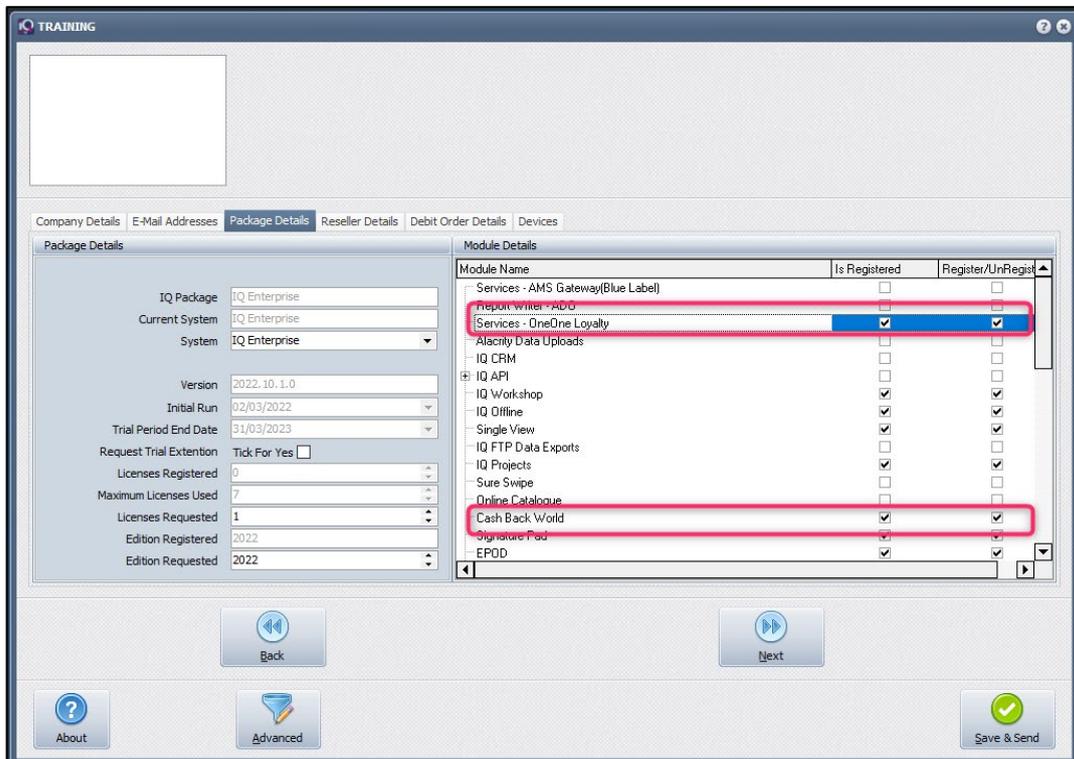
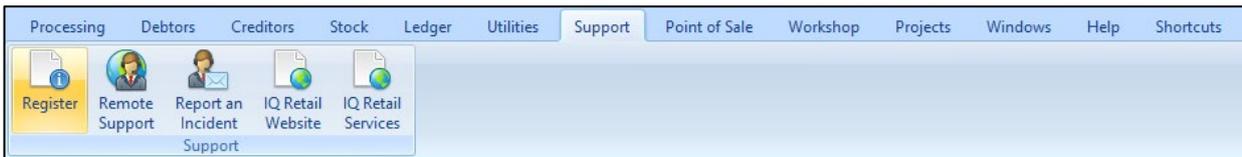
Only one Loyalty provide can used at any given time.

Loyalty can be paid as a monthly fee per store or as an annul amount per year per store.

Contact the Sales Department at IQ Retail for the latest prices on the software.

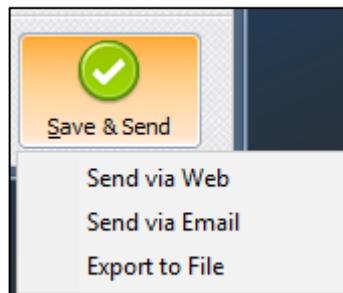
TopShopper does not require a registration process.

Select the Support Menu Option → Register IQ → Package Details



Tick the box for 'Register' your choice of Loyalty partner under Module Details.

If the Save & Send option is used, email the reg.txt file to iqregistration@kerridgecs.com.



If the Save & E-mail is used, select the Send via Web or Send via Email or Export File.

The End User Licence Agreement will appear on the screen. You must agree to the Terms and Conditions in the End User Licence Agreement by ticking the box and selecting the Accept button to continue to the e- mail setup screen and send the email as per normal.

Please send the Proof of Payment for the registration to iqaccounts@kerridgecs.com.

After payment has been received, the registration will be sent back to the listed email in the registration details.

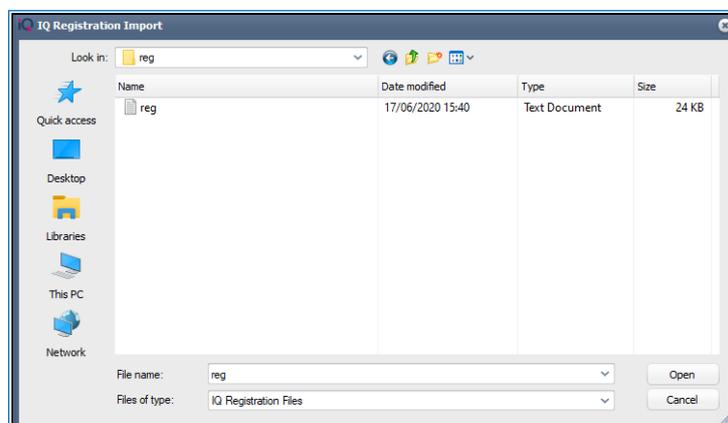
## REGISTRATION EMAIL

You will receive an email, save the reg.txt attachment to e.g. Desktop. Example of email below:



Select Support → Register IQ Enterprise → Click Advance → Import Registration.

Re-type the confirmation code (remember it is case sensitive) and select OK.



Go back to where the reg.txt file was saved and open it.

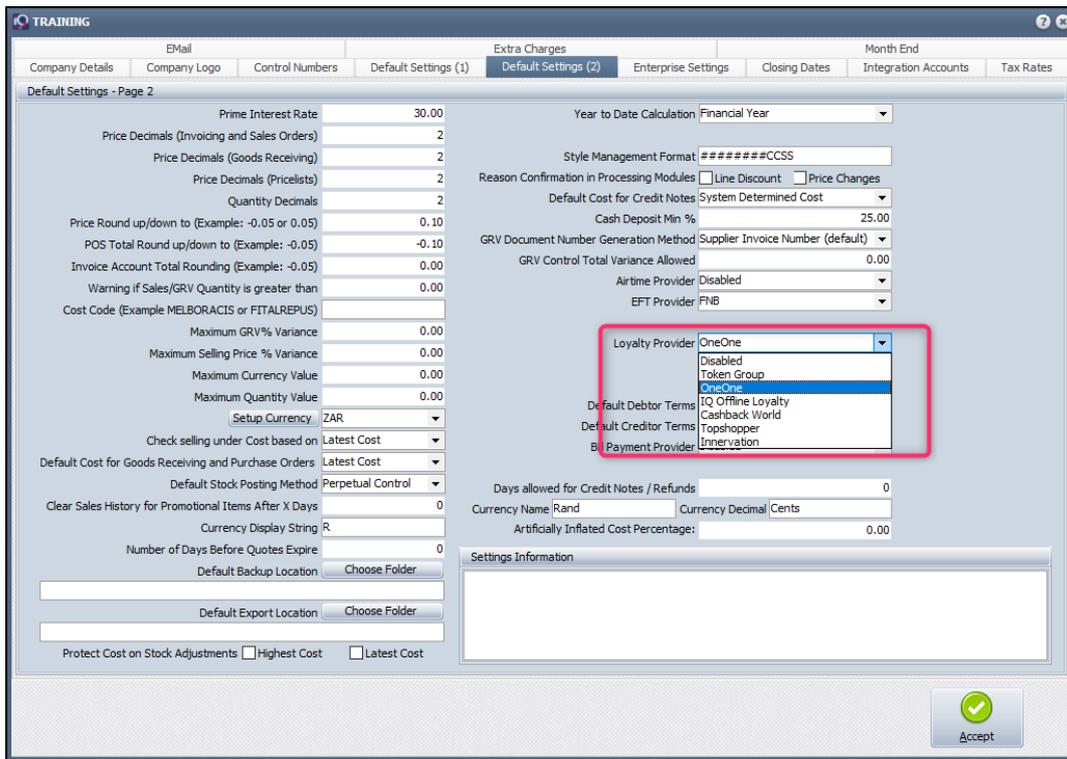
Select ok to complete the registration process.



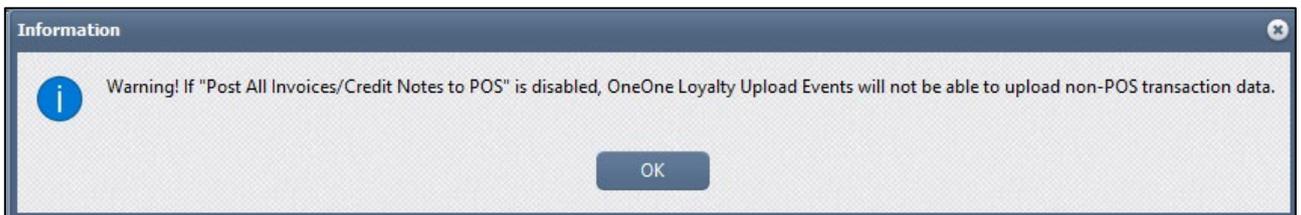
### DEFAULT SETTINGS (2)

The user must indicate which Loyalty provider will be used for processing purposes in the current company.

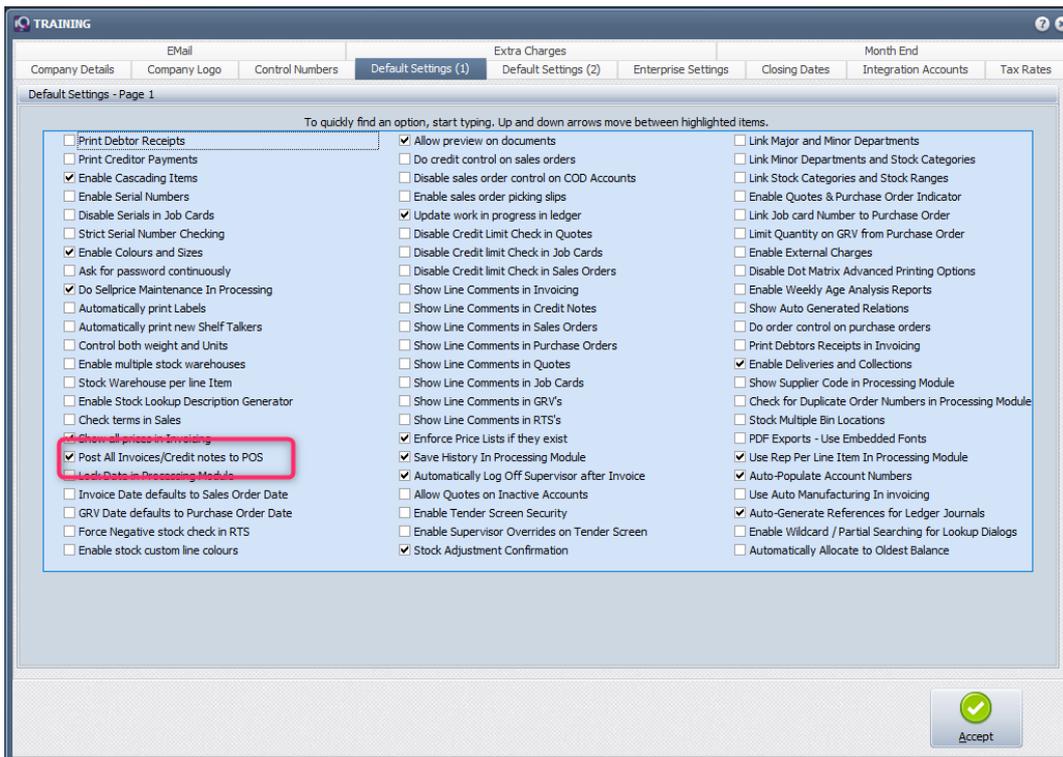
From The IQ main menu → Utilities → Setup → Company Details → Default Settings (2) → Loyalty Provider.



Select the your Loyalty provider by clicking on the drop-down menu next to the “Loyalty Provider”.



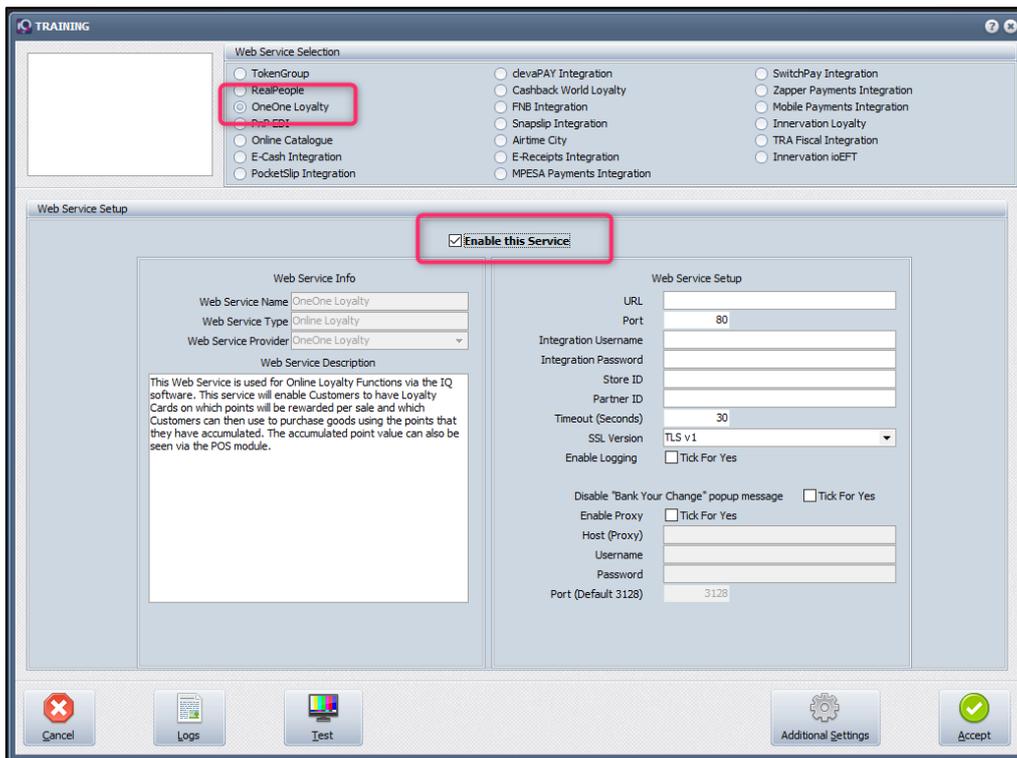
**NOTE:** The moment a Loyalty Provider is selected from the drop-down menu, the system will warn the user that “Post All Invoices/Credit Notes to POS” must be enabled in Company Details → Default Settings (1), for the Loyalty Provider to upload events.



Click on the Accept button on the bottom of the screen to save the information.

**MODULE PARAMETERS**

From the IQ main menu → Utilities → Setup → Module Parameters → Services Tab → Select Web Services and click on the Setup button at the bottom of the screen.



Select the your Loyalty Provider.

We will be using OneOne Loyalty as the exampe at the top of the screen.

**IMPORTANT:** Tick the box to “Enable this Service”.

The OneOne Loyalty Web Service is used for Online Loyalty Functions via the IQ software.

This service will enable Customers to have Loyalty Cards on which points will be rewarded per sale and which Customers can then use to purchase goods using the points that they have accumulated. The accumulated point value can be seen via the POS module.

## WEB SERVICE SETUP

After the user has applied for an account with the Loyalty Prover, the web service setup can be done.

Please note: Each Loyalty provider settings will be different, details will be supplier by the loyalty provider.

<b>URL</b>	This contains the web <b>URL</b> that indicates the location of the Web Service to be connected to. It usually ends with <b>wSDL</b> .  This URL should be obtained from Loyalty services provider
<b>PORT</b>	Port 80 is used by default – unless the data is sent over a Secure Socket Layer (SSL) in which case the port must be changed according to requirements by Loyalty services provider (usually port 443).
<b>INTEGRATION USERNAME &amp; PASSWORD</b>	These are provided by the Loyalty services provider.
<b>STORE ID &amp; PARTNER ID</b>	As per the Loyalty Company.
<b>PROXY &amp; LOGGING SUPPORT</b>	Proxy and logging support are made available, should it be required in the trading environment.

## BUTTON FUNCTIONALITY

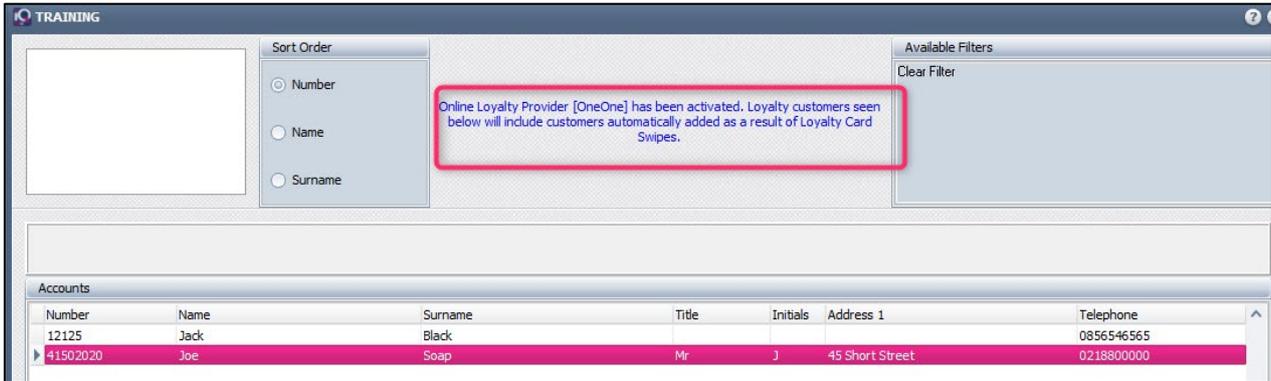


<b>CANCEL</b>	This option is to cancel the captured information and to exit the Web Service Setup screen.
<b>LOGS</b>	A log is kept of all the communication between the IQ Enterprise system and the Loyalty services provider.
<b>TEST</b>	The Test option is used to test to see if the connection is working.  The user must enter an existing Loyalty account number to test the connection.  If there are any errors with the connectivity, the user will get an error message displaying where the problem is.  If the connection was successful, the test comes back successfully.
<b>ACCEPT</b>	The Accept button is used to save the captured information end to exit the screen.



## MAINTAIN LOYALTY CUSTOMERS

From the IQ main menu → Point Of Sale → Loyalty Functions → Add or Edit.

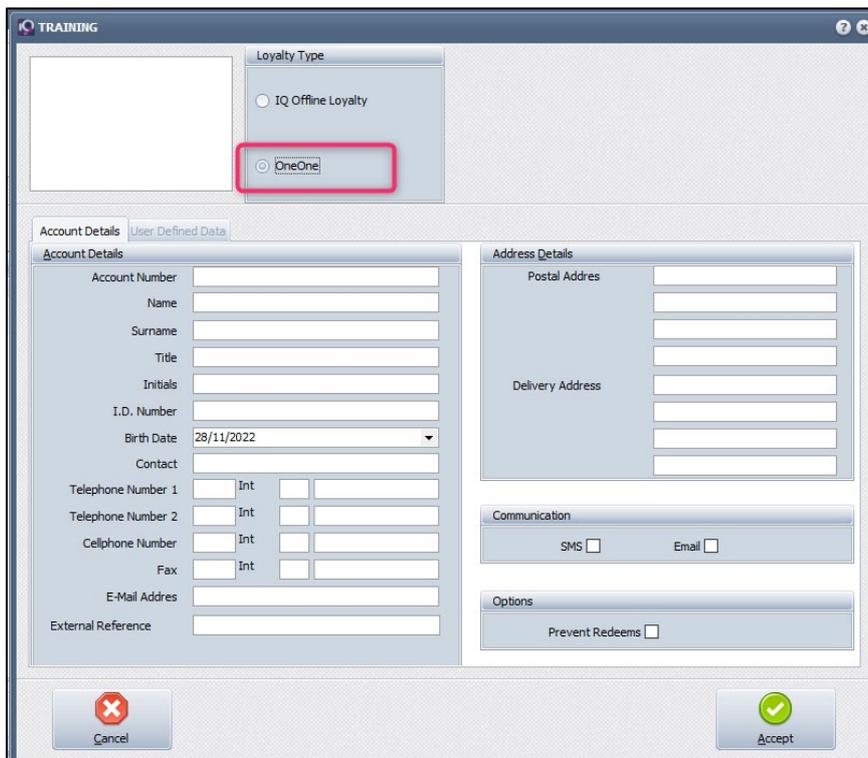


The system will indicate that the Online Loyalty Provider (OneOne) has been enabled and will show all the loyalty customers – including those added automatically as a result of a card swipe action under Point of Sale.

Hence, loyalty customers can be automatically added by the system, as the cards for such loyalty customers are presented to the system.

These Automatically added loyalty customers can be edited to save the name and communication information on your system.

A number of additional characteristics are now definable for each loyalty client.



## LOYALTY MAINTENANCE

<b>ACCOUNT DETAILS</b>	The Loyalty Account information for the Loyalty Customer must be captured here. There are a few required fields that need to be completed before the system will allow the user to Accept this Loyalty customer.
<b>ADDRESS DETAILS</b>	The postal and Delivery Addresses of the customer can be captured here.
<b>COMMUNICATION</b>	The user must select which communication method: SMS and/or Email.
<b>OPTIONS</b>	Tick the 'Prevent Redeems' box if the customer should not be allowed to redeem the loyalty points.

## USING LOYALTY IN ACCOUNT SALES

To use Loyalties on account sales, the debtors accounts must be linked to specific Loyalty Accounts.

From the IQ main menu → Debtors → Maintenance → Select appropriate debtors account → Edit → Select Loyalty Account to be linked to the selected Debtors Account → Accept.

The screenshot displays the 'Additional Settings' and 'Sale and Discount Information' sections of the IQ Loyalty Maintenance interface. The 'Additional Settings' section includes fields for Debtor Group, Debtor Sub Group, On Hold, Status, Expiry Date, Default Layout, Notification, and Loyalty Account. The 'Loyalty Account' field is highlighted with a red box and contains the value '123456'. The 'Sale and Discount Information' section includes fields for Payment Method, Export Status, Invoice Disc%, Settlement Disc%, Apply as Line Discount, Allow Cash Sale, Sell Price, and Normal Rep. The 'Security' section includes fields for Enable Account Verification, Enter Verification Password(s), and Enable Two Factor Authentication.

When this debtors account is selected for an account sale, the system will immediately try to communicate with the Loyalty server.

## USING LOYALTY IN POINT OF SALE

When a Point of Sale transaction is being captured, the user can press the F9 – Loyalty button at the bottom of the screen to enter a loyalty card number.

The screenshot shows a POS interface with a 'SALE TOTAL' of 190.60. Below the total is a 'Tax Invoice' table with the following data:

Code	Description	Price	Qty	Total
CEM001	Cement	190.60	1.00	190.60

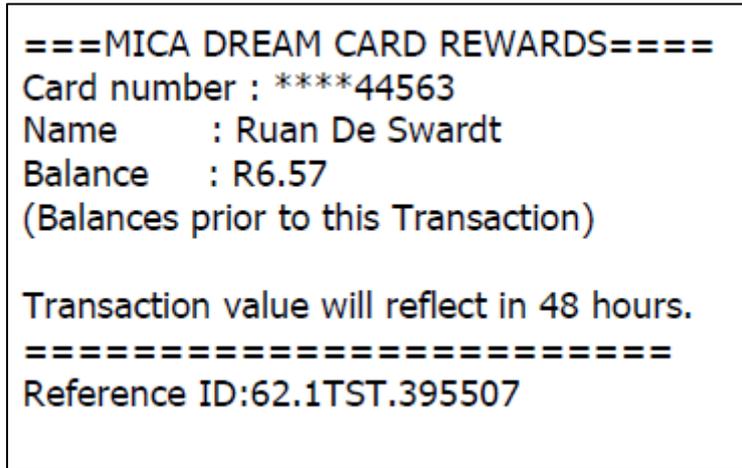
At the bottom of the screen, the 'F9 - Loyalty' button is highlighted with a red box. Other buttons include F1 - Subtotal, F2 - Void Line, F3 - Suspend, F4 - Void Sale, F5 - Customer, F7 - Customer Info, F8 - Supervisor Logon, and F10 - Turn Printer Off.

The dialogue screen will allow the entering of an Online Loyalty card number by default.

The dialog box displays the text 'Swipe OneOne Loyalty Card' and 'OneOne - Customer Account'. Below this text is a text input field. At the bottom of the dialog, there are three buttons: 'Cancel' (with a red X icon), 'Offline Loyalty' (with a group of people icon), and 'Accept' (with a green checkmark icon).



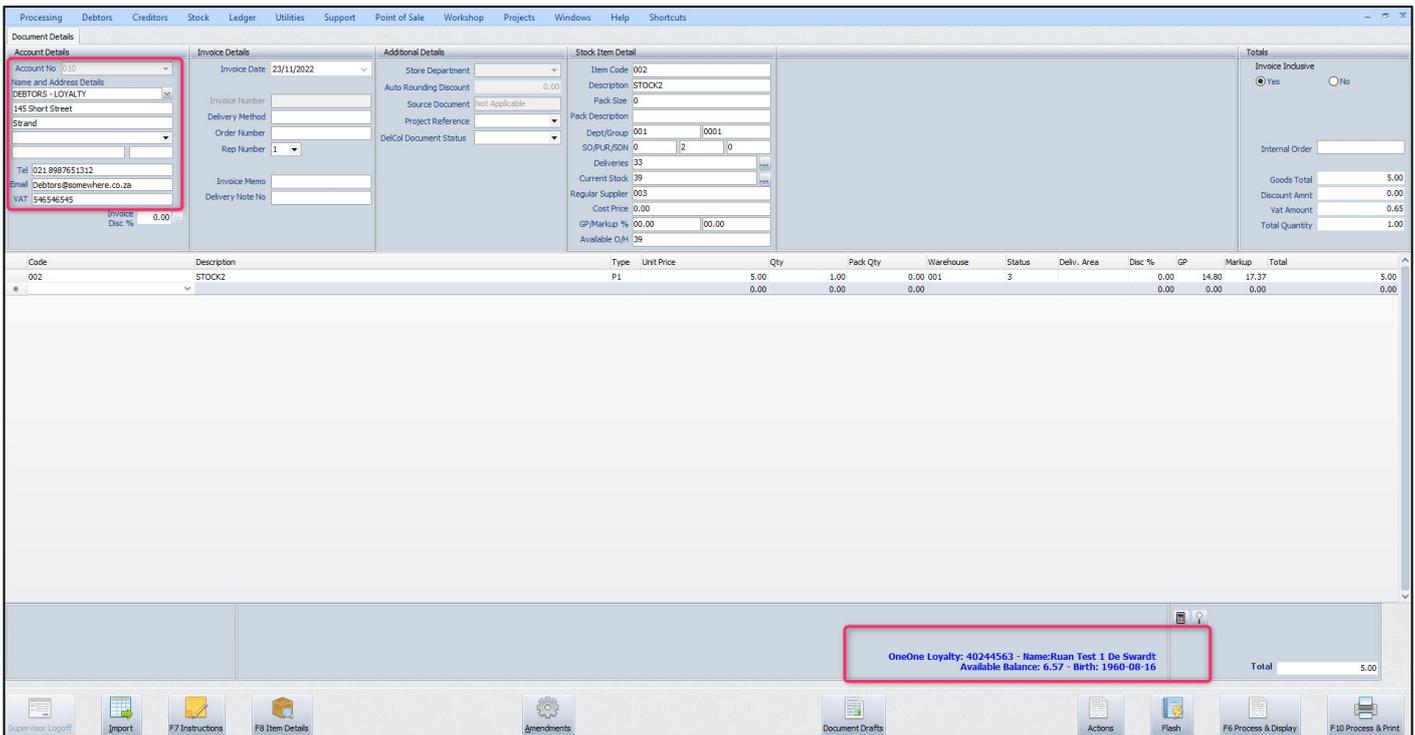
The Loyalty details will print on a separate receipts



Upon successful completion of the sale, the system will again communicate with the Loyalty Server and will send the transaction data for rewards purposes.

**USING ONEONE LOYALTY IN ACCOUNT SALES**

From the IQ main menu → Processing → Invoicing → Processing → New.



The moment the debtor's account is selected, the Loyalty information of the customer will be displayed at the bottom of the Invoice screen.

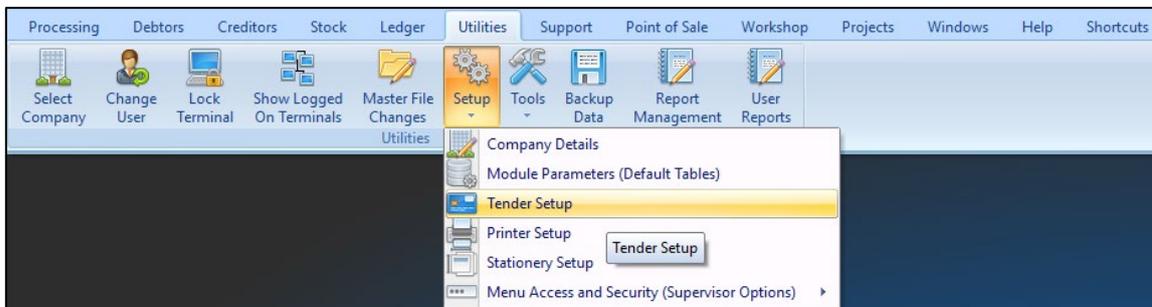
Once the Invoice has been processed the Loyalty details will display on the document below the stock items.

Tax Invoice						
<b>Invoice From</b> REGRESSION TEST COMPANY 123 IQ Street 123 IQ Street 123 IQ Street 123 IQ Street			Telephone 0218800420 Fax 0218800420 E Mail Vat Registration No Invoice Date 23/11/2022			
<b>Invoice To</b> DEBTORS - LOYALTY			<b>Deliver To</b> DEBTORS - LOYALTY 145 Short Street Strand			
Account No	Invoice Date	Order Number	Representative	Invoice Number	Page	
010	23/11/2022	1	Rep 1	INV425	1 of 1	
Item Code	Description	Quantity	Unit Price	Disc %	Vat Amt	Line Total
002	STOCK2	1.00	4.35		0.65	4.35
<b>Loyalty Information (Card / Account: 40244563)</b> Name: Ruan Test 1 De Swardt Points From 6.57 to 6.57						
Transaction	Approval	Type	Amount			
INV425.1TST.386728		Issue	5.00			
<b>Extra Charges</b>		Number of Items 1  Promotional Discount Received	<b>Subtotal (Exclusive)</b> Discount Vat Total	4.35  0.65 5.00		

### REDEEMING LOYALTY

To redeem previously acquired points, the system must have a Tender Type that allows OneOne redemptions. This can be achieved by amending a Tender Type in the Tender Setup.

From the IQ main menu → Utilities → Tender Setup → Select Gift Voucher Tender Type → Edit.



Code	Description	Category	Over Tender	Is Bankable	Value	EFT	Open Drawer	Ledger	Ledger out
CT	Cash	False	True	True	R0.00	False	True	3700.000.000.00	3700.000.000.00
CX	...More	True	False	False	R0.00	True	False	3700.000.000.00	3700.000.000.00
DC	Debit Card	True	False	False	R0.00	True	True	3700.000.000.00	3700.000.000.00
DC1	Debit Card 1	False	False	False	R0.00	True	False	3700.000.000.00	3700.000.000.00
DC2	Debit Card 2	False	False	False	R0.00	True	False	3700.000.000.00	3700.000.000.00
DC3	Debit Card 3	False	False	False	R0.00	True	False	3700.000.000.00	3700.000.000.00
DC4	Debit Card 4	False	False	False	R0.00	True	False	3700.000.000.00	3700.000.000.00
DC5	Debit Card 5	False	False	False	R0.00	True	False	3700.000.000.00	3700.000.000.00
DS	Discount	True	False	False	R0.00	False	True	2020.000.000.00	2520.000.000.00
DS1	Discount 1	False	False	False	R0.00	False	True	2020.000.000.00	2520.000.000.00
DS2	Discount 2	False	False	False	R0.00	False	True	2020.000.000.00	2520.000.000.00
DS3	Discount 3	False	False	False	R0.00	False	True	2020.000.000.00	2520.000.000.00
DS4	Discount 4	False	False	False	R0.00	False	True	2020.000.000.00	2520.000.000.00
DS5	Discount 5	False	False	False	R0.00	False	True	2020.000.000.00	2520.000.000.00
GV	Gift Voucher	True	False	False	R0.00	False	True	3700.000.000.00	3700.000.000.00
GV1	Voucher 1	False	False	False	R0.00	False	True	4605.000.000.00	4605.000.000.00
GV2	Voucher Refund	False	False	False	R0.00	False	True	4605.000.000.00	4605.000.000.00
GV3	Offline Loyalty Reb	False	False	False	R0.00	False	True	3700.000.000.00	3700.000.000.00
GV4	Taken Group Rebate	False	False	False	R0.00	False	True	3700.000.000.00	3700.000.000.00
GV5	OneOne Redeem	False	False	False	R0.00	False	True	3700.000.000.00	3700.000.000.00

IMPORTANT: Tick the box to “Use as OneOne Redeem Tender”.

**Tender Information**

Tender Code: GV1  
 Tender Type: GV  
 Tender Description: One One redeem

**Over Tendering Options**

Allow Over Tender  
 Lowest Allowable Over tender (LALO): 0.00  
 Highest Allowable Over tender (HALO): 0.00

**POS Options**

Ask for Expiry Date  
 Open Drawer  
 Enable devalPAY Integration  
 Enable Mobile Integration  
 Enable E-Cash Integration

**Ledger Options**

Tender Post Type:  
 Post To Ledger  
 Use as Stock Discount

Ledger Account : Receipts: 3700.000.000.00  
 Ledger Account : Payments: 3700.000.000.00

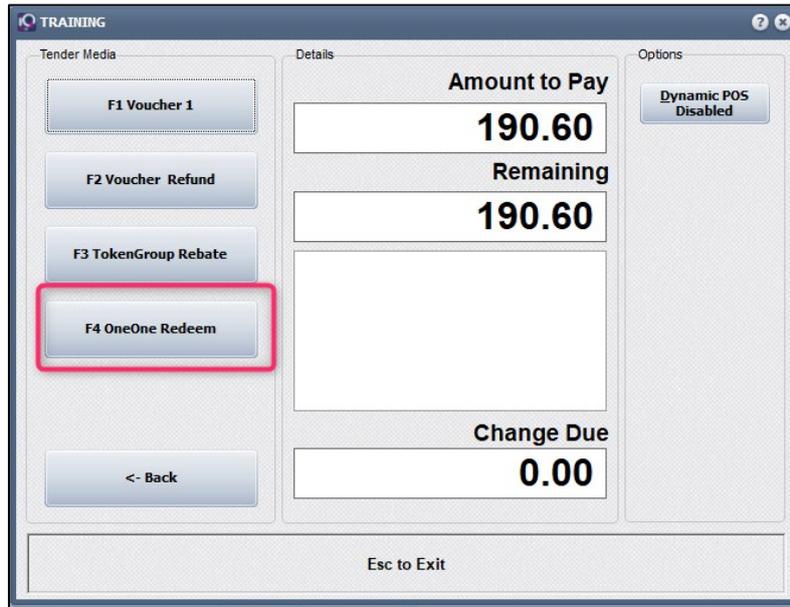
**X Report Options**

Is Bankable  
 Electronic Fund Transfer

Use as OneOne Redeem Tender

Accept

This tender will now become available as a Redeem option when finalizing a sale. On selecting the tender option and confirming the amount, the system will communicate with the loyalty server to ensure that the required funds are available.



Loyalty information will be printed on the slip layout.

**POS SLIP:**

<b>Loyalty Information: 41502020</b>			
<b>Name: Mr ICal Test 1</b>			
<b>Balance : From 7252.18 to 7252.18</b>			
Transaction	Approval	Type	Value
103.1001	12345720	Redeem	2622.00
103.1001		Reward	2622.00

When a Credit Note is done on a Loyalty Invoice, the Loyalty Information will be printed on the Credit Note:

<b>Loyalty Information (Card / Account: 41502020)</b>			
<b>Name: Mr ICal Test 1</b>			
<b>Points: From 5154.58 to 5154.58</b>			
Transaction	Approval	Type	Amount
CRN101.1001		Issue Void	2 622.00

In the event of a card that has not yet been registered with OneOne loyalty, being swiped, the following will apply:

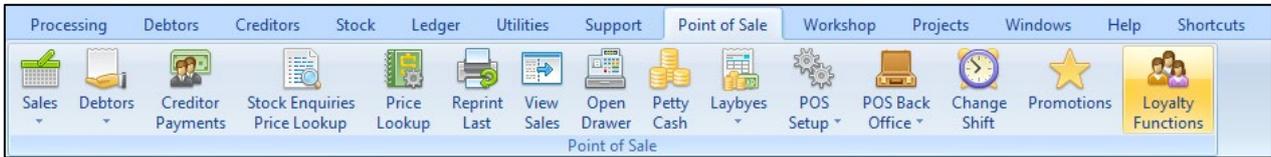
- Rewards will be allowed on the card. In other words, the transaction information of the unregistered card will be sent to the Loyalty server
- Redeems will NOT be allowed
- Redeem transactions will not be allowed on OneOne Cash Refunds.
- All redeem reversals are handled manually by OneOne head Office via another system.
- NOTE: All transactions (including Non-Loyalty transactions) are sent to the OneOne Loyalty server for reporting or business intelligence reasons. Thus, all transactions will require communication with the OneOne Loyalty server, even if no card numbers have been provided.

The system will allow scanning of the completed card track information after which (on click Accept – which happens automatically when scanning), the relevant information will be extracted and used as the card number.

### IQ OFFLINE LOYALTY CUSTOMERS

IQ Offline Loyalty customers have to be added on the system, before they can be selected in transactions.

To add customers: from the IQ main menu → Point of Sale → Loyalty Functions → Add.



The screenshot displays the 'Loyalty Maintenance' window. It features the 'iQRetail ENTERPRISE' logo and a 'Loyalty Type' section with 'IQ Offline Loyalty' selected. The 'Account Details' section includes fields for Account Number (12125), Name (Jack), Surname (Black), Title (Mr), Initials (JJ), Birth Date (13/01/1983), and Contact (Jack). There are also fields for Telephone Number 1, Telephone Number 2, Cellphone Number, Fax, E-Mail Address, and External Reference. The 'Address Details' section has fields for Postal Address and Delivery Address. The 'Communication' section has checkboxes for SMS and Email. The 'Options' section has a checkbox for 'Prevent Redeems'. At the bottom, there are 'Cancel', 'Additional Settings', and 'Accept' buttons.

**NOTE:** Loyalty Customer Maintenance is not the same as Debtors Maintenance. You can link a Debtor in Debtors Maintenance to a IQ Offline Loyalty Customer, once the Loyalty Customer has been created.

### LOYALTY MAINTENANCE

<p><b>ACCOUNT DETAILS</b></p>	<p>The Loyalty Account information for the Loyalty Customer must be captured here. There are a few required fields that need to be completed before the system will allow the user to Accept this Loyalty customer.</p> <p><b>NOTE:</b> The account number used in this screen is a unique number created by the user.</p>
<p><b>ADDRESS DETAILS</b></p>	<p>The postal and Delivery Addresses of the customer can be captured here.</p>
<p><b>COMMUNICATION</b></p>	<p>The user must select which communication method: SMS and/or Email.</p>
<p><b>OPTIONS</b></p>	<p>Tick the 'Prevent Redeems' box if the customer should not be allowed to redeem the loyalty points.</p>

**ADDITIONAL SETTINGS**

This option can be used to capture or adjust loyalty points for New Loyalty customers.

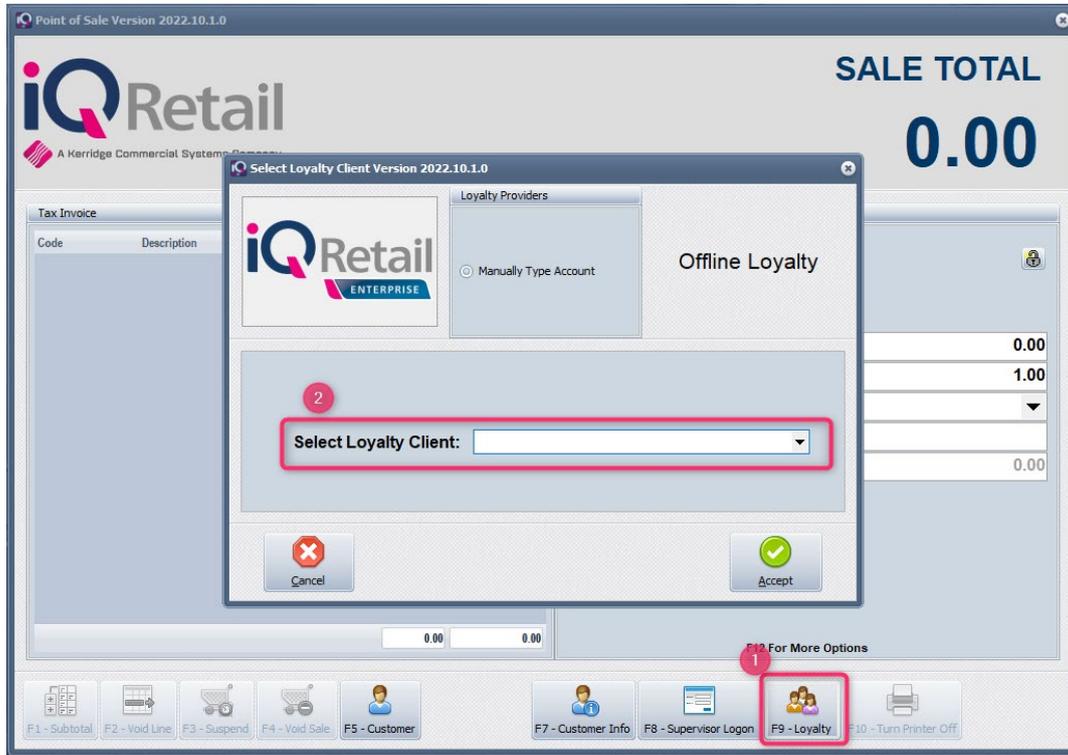
<b>SELECT POSTING METHOD</b>	This will be an Adjustment on the existing points.
<b>CURRENT POINTS</b>	This value is the points the customer currently has available.
<b>ENTER POINTS</b>	This is an editable value, which can be used to adjust the existing points for the customer.

### LOYALTY REWARD

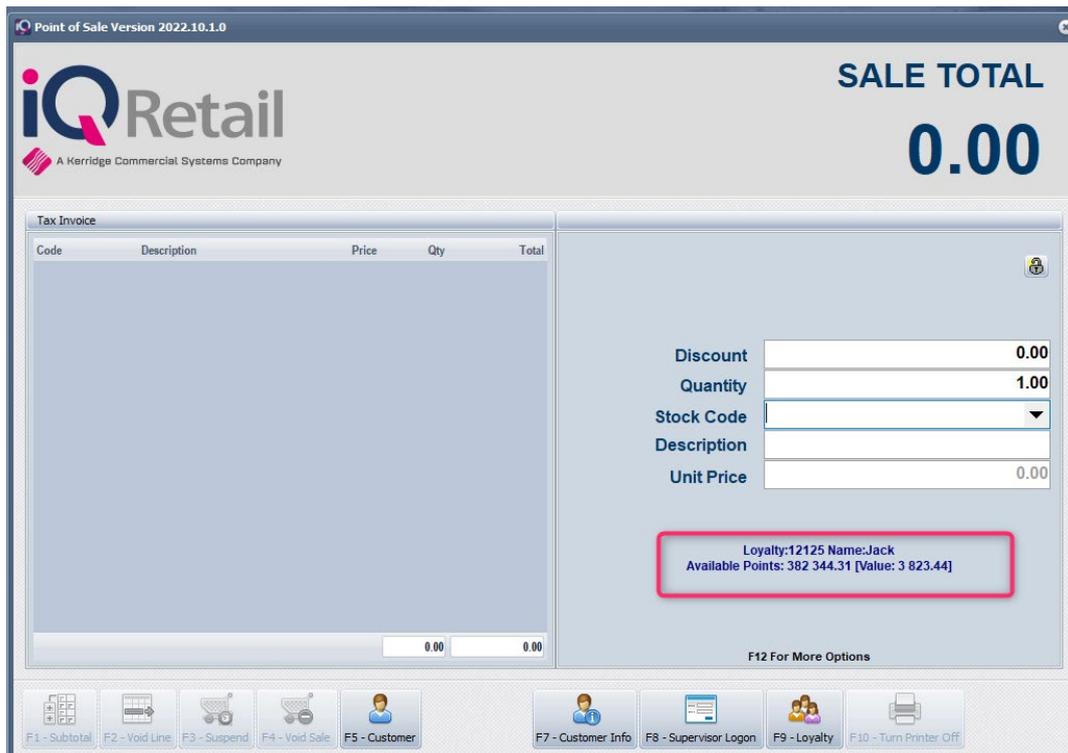
Loyalty points can be rewarded through two modules within the system: Point of Sale and Invoicing. Each of these modules requires offline loyalty customers to be setup beforehand.

### LOYALTY THROUGH POINT OF SALE

When performing a Point of Sale loyalty transaction, select a Loyalty customer beforehand by clicking on the 'loyalty' button at the bottom of the screen or by pressing the F9 key on the keyboard.



Select an existing IQ Offline Loyalty customer from the drop-down menu and click on accept. After selecting a customer, the customer's loyalty information will be displayed on the screen.



The user can proceed adding items and finalising the sale. When the sale is concluded, the appropriate loyalty points rewarded is calculated.

The calculation is as follow:

- Item has loyalty reward rate – calculate points
- Item doesn't have loyalty rate
- Linked Major Department has loyalty rate – add to Major department total amount
- Item doesn't have loyalty rate
- Linked Major Department doesn't have loyalty rate
- Add to Company total amount.
- Calculate points on each Major Department total amount
- Calculate points on company total amount
- Add points of each level together and reward points

When a new sales transaction is started, the amount of redeemable points available, with the current value based on the entered redeem rate, for the customer is displayed.

### LOYALTY THROUGH INVOICING

When performing an Invoicing loyalty transaction, the Loyalty customer must be selected.

From the IQ main menu → Processing → Invoicing → Enter or select the appropriate debtor's account number → Enter.

Select the Actions button at the bottom of the screen or press the F9 key on the keyboard.

There are 2 available options on the Actions button:

- Delete Zero Quantities – used to delete all the lines where the quantity is zero
- IQ Offline Loyalty login – used to log in to the IQ Loyalty Offline Loyalty option

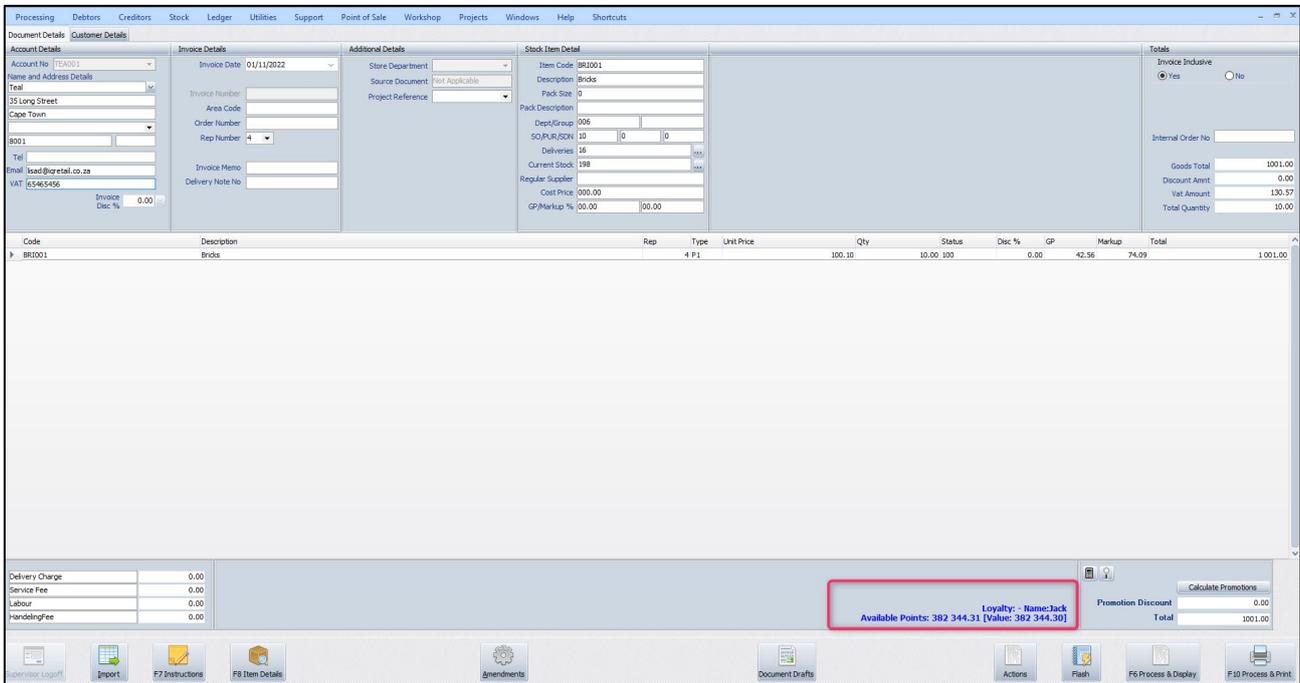
Select the IQ Offline Loyalty Login option → The Select Loyalty Client screen appears, where the user can enter the Loyalty client's account number manually or the Loyalty account can be selected by clicking on the drop-down menu.

The screenshot shows a software window titled "TRAINING" with a standard Windows-style title bar. Inside the window, there's a section for "Loyalty Providers" which includes a radio button labeled "Manually Type Account". To the right of this section, the text "Offline Loyalty" is displayed. Below these elements is a large light-blue rectangular area containing the text "Select Loyalty Client:" followed by a dropdown menu that currently shows "TEA001". At the bottom of the window, there are two buttons: a "Cancel" button with a red 'X' icon and an "Accept" button with a green checkmark icon.

**NOTE:** The IQ Offline Loyalty account for each debtor must first be created, before it can be used in the processing module.

Create the Offline Loyalty client in the POS → Loyalty Functions → Add.

After selecting a customer, the customer’s loyalty information will be displayed on the invoice screen.



The user can proceed adding items and finalising the sale. When the sale is concluded, the appropriate loyalty points rewarded is calculated. The calculation is as follow:

- Item has loyalty reward rate – calculate points
- Item doesn't have loyalty rate
- Linked Major Department has loyalty rate – add to Major department total amount
- Item doesn't have loyalty rate
- Linked Major Department doesn't have loyalty rate
- Add to Company total amount
- Calculate points on each Major Department total amount
- Calculate points on company total amount
- Add points of each level together and reward points

When a new Invoicing transaction is started and the loyalty customer is selected, the amount of redeemable points available, with the current value based on the entered redeem rate, for the customer will be reflected on the screen and be printed on the invoice.

Tax Invoice						
<b>Invoice From</b>						
<b>Demo Data</b> 1st floor, Moonstone Building 25 Quantum Road Techno Park Stellenbosch			<b>Telephone</b> 0218800420 <b>Fax</b> <b>E Mail</b> lisad@iqretail.co.za <b>Vat Registration No</b> <b>Invoice Date</b> 01/11/2022			
<b>Invoice To</b>			<b>Deliver To</b>			
Teal			Teal 35 Long Street Cape Town  8001			
<b>Account No</b>	<b>Invoice Date</b>	<b>Order Number</b>	<b>Representative</b>	<b>Invoice Number</b>	<b>Page</b>	
TEA001	01/11/2022		4 Jane	INV133	1 of 1	
<b>Item Code</b>	<b>Description</b>	<b>Quantity</b>	<b>UnitPrice</b>	<b>Disc %</b>	<b>VatAmnt</b>	<b>Line Total</b>
BRI001	Bricks	10.00	87.04		130.57	870.43
<b>Loyalty Information (Card / Account: 12125)</b> Name: Jack Points: From 382344.308 to 382354.318						
<b>Transaction</b>	<b>Approval</b>	<b>Type</b>	<b>Amount</b>			
		Issue	1 001.00			

**LOYALTY REDEEM**

Loyalty points can be redeemed through two modules within the system: Point of Sale and Invoicing. Each of these modules requires offline loyalty customers to be set up beforehand and a redeem rate which is specified within company details. Redeeming loyalty points will require a tender type, to be setup which can be used to redeem points.

### LOYALTY TENDER TYPE

A new tender type needs to be created or added and it must be set as a loyalty tender type. To set a loyalty tender type: From the IQ main menu → Utilities → Setup → Tender Setup → Select an existing or add a new Tender Type.



TRAINING

Available Filters  
Clear Filter

Code	Description	Category	Over Tender	Is Bankable	Value	EFT	Open Drawer	Ledger	Ledger out
CT	Cash	False	True	True	R0.00	False	True	3700.000.000.00	3700.000.000.00
CX	... More	True	False	False	R0.00	True	False	3700.000.000.00	3700.000.000.00
DC	Debit Card	True	False	False	R0.00	True	True	3700.000.000.00	3700.000.000.00
DC1	Debit Card 1	False	False	False	R0.00	True	False	3700.000.000.00	3700.000.000.00
DC2	Debit Card 2	False	False	False	R0.00	True	False	3700.000.000.00	3700.000.000.00
DC3	Debit Card 3	False	False	False	R0.00	True	False	3700.000.000.00	3700.000.000.00
DC4	Debit Card 4	False	False	False	R0.00	True	False	3700.000.000.00	3700.000.000.00
DC5	Debit Card 5	False	False	False	R0.00	True	False	3700.000.000.00	3700.000.000.00
DS	Discount	True	False	False	R0.00	False	True	2020.000.000.00	2520.000.000.00
DS1	Discount 1	False	False	False	R0.00	False	True	2020.000.000.00	2520.000.000.00
DS2	Discount 2	False	False	False	R0.00	False	True	2020.000.000.00	2520.000.000.00
DS3	Discount 3	False	False	False	R0.00	False	True	2020.000.000.00	2520.000.000.00
DS4	Discount 4	False	False	False	R0.00	False	True	2020.000.000.00	2520.000.000.00
DS5	Discount 5	False	False	False	R0.00	False	True	2020.000.000.00	2520.000.000.00
GV	Gift Voucher	True	False	False	R0.00	False	True	3700.000.000.00	3700.000.000.00
GV1	Voucher 1	False	False	False	R0.00	False	True	4605.000.000.00	4605.000.000.00
GV2	Voucher Refund	False	False	False	R0.00	False	True	4605.000.000.00	4605.000.000.00
GV3	Offline Loyalty Reb	False	False	False	R0.00	False	True	3700.000.000.00	3700.000.000.00
GV4	TokenGroup Rebata	False	False	False	R0.00	False	True	3700.000.000.00	3700.000.000.00
GV5	OneOne Redeem	False	False	False	R0.00	False	True	3700.000.000.00	3700.000.000.00

Select Visible Fields | Filter | Search | Add | Edit | Delete | Design | Preview

TRAINING

Tender Information  
Tender Code: GV3  
Tender Type: GV  
Tender Description: Offline Loyalty Rebata

Over Tendering Options  
 Allow Over Tender  
Lowest Allowable Over tender (BALD): 0.00  
Highest Allowable Over tender (HALD): 0.00

POS Options  
 Ask for Expiry Date  
 Enable devaPAY Integration  
 Open Drawer  
Fixed Value: 0.00  
 Fixed Percentage  
 Enable Reference  
 Use as IQ Offline Loyalty Redeem Tender  
 Valid Reference  
Voucher Types: All Types

Ledger Options  
Tender Post Type:  Post To Ledger  Use as Stock Discount  
Ledger Account - Receipts: 3700.000.000.00  
Ledger Account - Payments: 3700.000.000.00  
 Is Bankable  
 Electronic Fund Transfer

Accept

Enter the tender's description

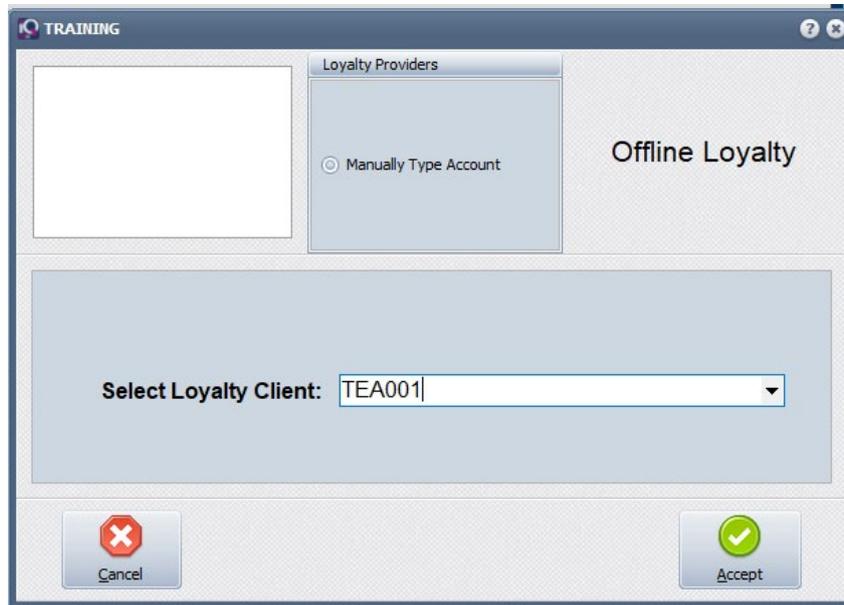
Tick the box for “Use as IQ Offline Loyalty Redeem Tender” on the tender setup screen. This tender will now be displayed within the tender list and can be used to redeem loyalty points.

### REDEEMING POINTS

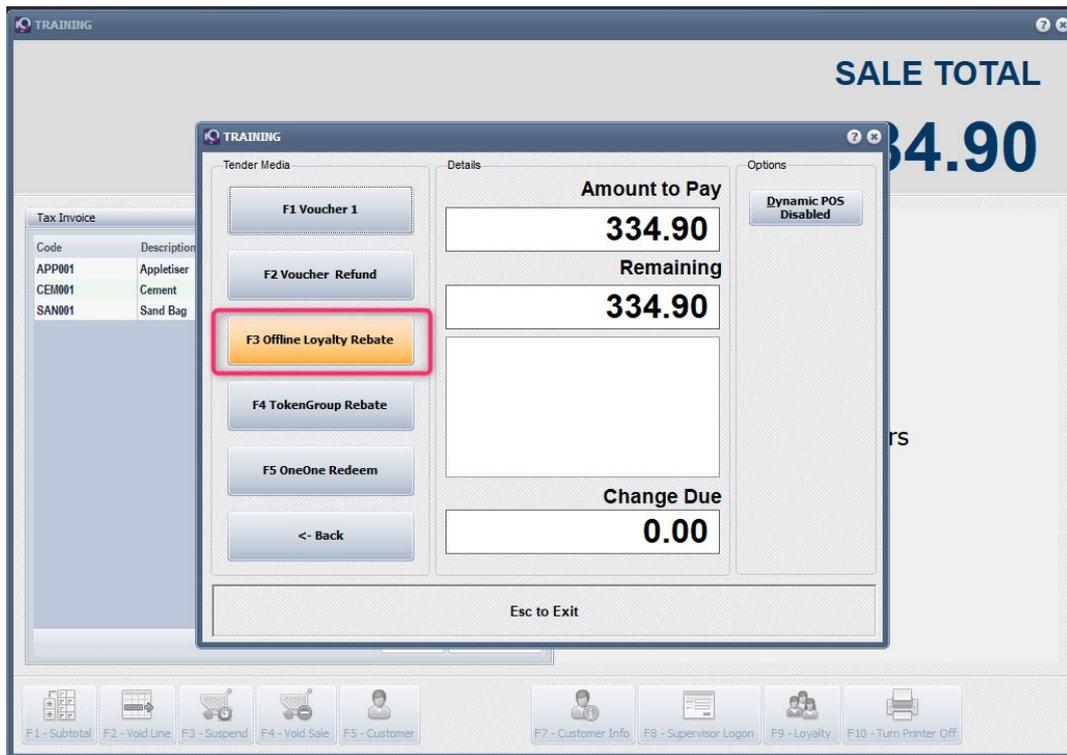
The process of redeeming points is the same for the Point of Sale and Invoicing modules.

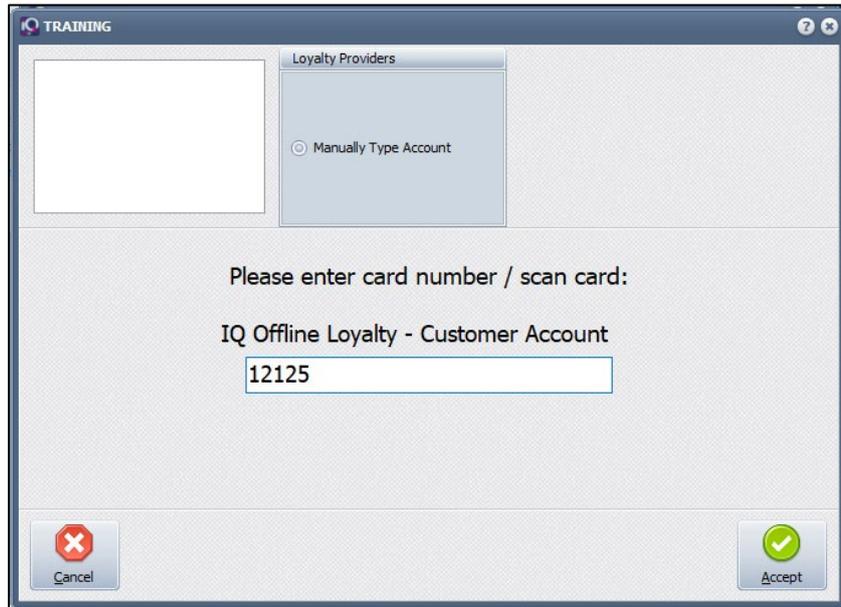
To redeem points, the following needs to be done:

Setup the loyalty account



Setup a loyalty tender type

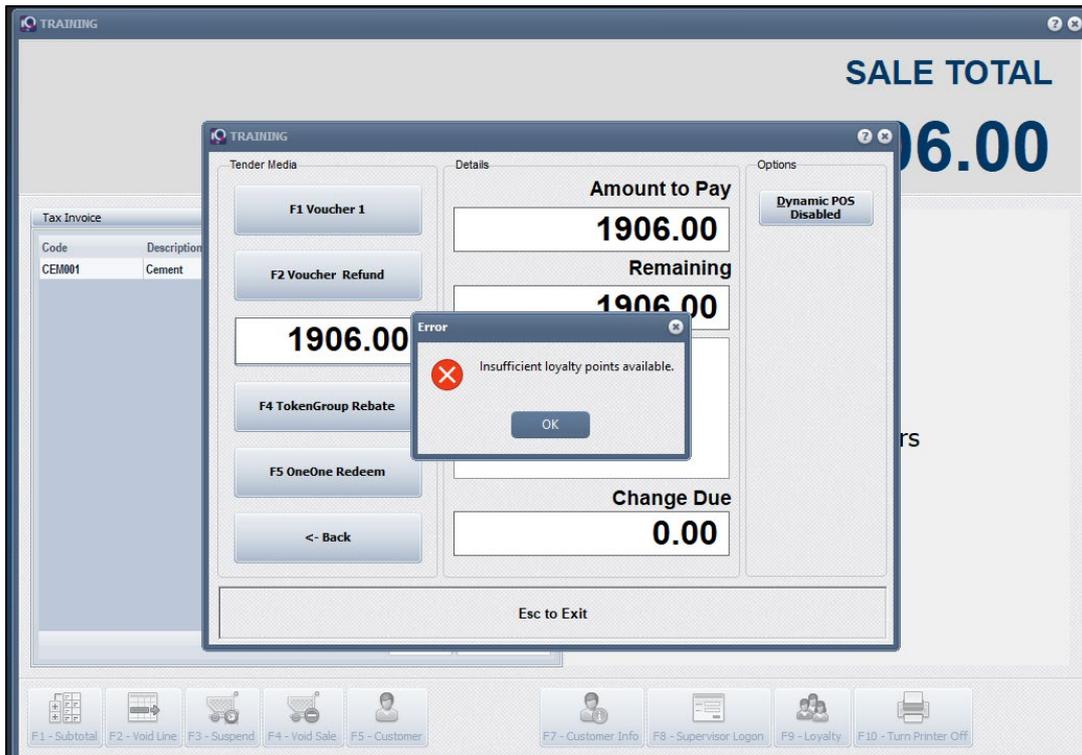




The loyalty customer needs to be selected before the transaction is completed

At the point where the transaction is completed, the tender media screen will be displayed, where the user must select the Loyalty Tender type and enter the amount the customer wish to redeem

If the loyalty account doesn't have available points to redeem, a message will be displayed indicating that the customer doesn't have enough points



When the customer does have points, but not enough for the entered amount due, the system will calculate the amount worth of the total points available and query the user if they wish to redeem the specified amount of points.

Although the customer is redeeming points within the current transaction, they will still be rewarded for the total amount of the sale.

**SLIP:**

IQ Retail Pty Ltd  
1st Floor, Moonstone Building  
25 Quantum Road  
Techno Park  
Stellenbosch  
7600



Tax Invoice

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Till 1 Sale # 213    09:39:25    07/12/2022

Code	Description	Qty	Total
APP001	Appletiser	1	12.80
CEM001	Cement	1	190.60
SAN001	Sand Bag	1	131.50
Vat Included			43.68
<b>Subtotal</b>			<b>334.90</b>
Offline Loyalty Rebate			334.90

Cashier ADMIN USER

*\*\* Computer generated copy of original \*\**  
*Innovative Accounting Software by IQRetail*

Thank you for your support  
Trading Hours

Visit our website  
[www.iqretail.co.za](http://www.iqretail.co.za)

Loyalty Information: 12125  
Name: Jack  
Balance : From 382356.224 to 382021.324

Transaction	Approval	Type	Value
		Redeem	334.90

**REWARDED POINTS**

Loyalty points can be refunded through Point of Sale and Credit Notes. When performing a refund and selecting a loyalty customer, the total amount of the transaction will be refunded on loyalty points against the current rates specified. In other words, the customer’s loyalty points’ balance will decrease after the transaction is concluded. The user will not be able to refund loyalty points redeemed.

--- End of Document ---