

VERSION 2.0
OCTOBER 25, 2018

Apps for Greentree

CUSTOMER LOYALTY POINTS MODULE

APP NUMBER: 010026

Powered by:

MYOB Greentree

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FEATURES

1. **Accumulate points based on purchases.**
2. **Track points and print statements**
3. **Reward customers with credits/prizes.**

This App lets you reward your customers by accumulating loyalty points (both qualifying and redeemable) based on their product purchases. You can allow the accrual of different points depending on product or product group, award bonus points, print regular statements of qualification status and redeemable points, and deal with points claims (either credits on accounts, vouchers, or gifts).

- Accrue points on sales transactions
- Define your own rules for accrual including exclusions
- Track by Customer Points Earned and Redeemed
- Automatic level increase as Sales increase
- Monitor Loyalty Points earned by customers as they purchase.
- Redeem points for Prizes
- Redeem points as a Credit on Account
- Expire points not used

IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.
- Points and Prizes are set up as inventory items.

OTHER REQUIREMENTS

Greentree Modules: Inventory, Accounts Receivable, Web-Store (optional).

Associated Apps: Advanced Freight Module (optional).

USER INSTRUCTIONS

GENERATE POINTS

Points are generated for a date range and a range of customers. This process can be run as often as required. Other operations are also available – each option is covered separately below.

1. Select the menu item | System | Points | Points Generation |

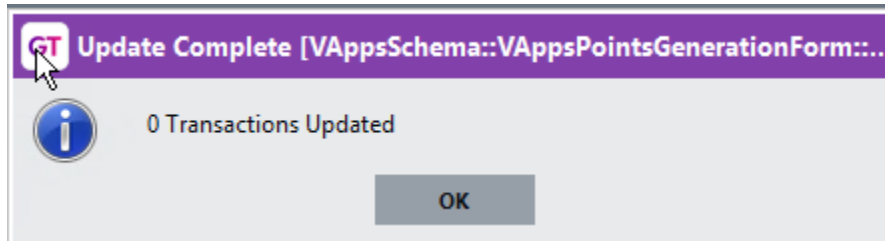
The screenshot shows a software window titled "Pts/Rebates Generation". On the left, under "Mode", the "Update" radio button is selected. On the right, under "Update / Recalculate / Transfer / Purge Options", the "From" and "To" fields are visible. The "Customer" field contains "091804625" and the "Date" field contains "01 / 12 / 13". The "Pos Type" field contains "ARINV" and the "Neg Type" field contains "ARCDT". The "To" field contains "TEST3" and the date "30 / 11 / 14". At the bottom right, there are "Process" and "Cancel" buttons. The status bar at the bottom left indicates "Ready".

UPDATE

Update is used to generate the points on transactions for a specified customer range and date range.

Customer From	Select the first customer to generate points for – this defaults to the first customer in the database
Customer To	Select the last customer to generate points for – this defaults to the last customer giving the full customer range
Date From	Select the first date of transactions to be included in this process
Date To	Select the last date of transactions to be included in this process
Pos Type	Select the transaction type that will accrue or increase the points a customer has
Neg Type	Select the transaction type that will decrease a customer's points e.g. if a credit has been issued
Process	Click this button to start the process and have points generated
Cancel	Click this button to close the form

A progress bar is displayed while the system is processing



Upon completion a message is displayed stating how many transactions have been processed – this is the count of invoices and credit notes that met the criteria.

You can then view the points transactions in Customer Maintenance – see later in this document

RECALCULATE

Recalculate is used to alter the points transactions where sales and credit notes have been altered or where a customer has been placed into a different points group. This function only processes transactions that have already had points generated for them.

Mode

- Update
- Recalculate
- Expire
- Transfer to Parent
- Purge
- Transfer from Parent
- Generate AR Credit
- Accrue maximum

Update / Recalculate / Transfer / Purge Options

From To

Customer

Recalculate **Cancel**

Ready

Customer From

Select the first customer to recalculate points for – this defaults to the first customer in the database

Customer To

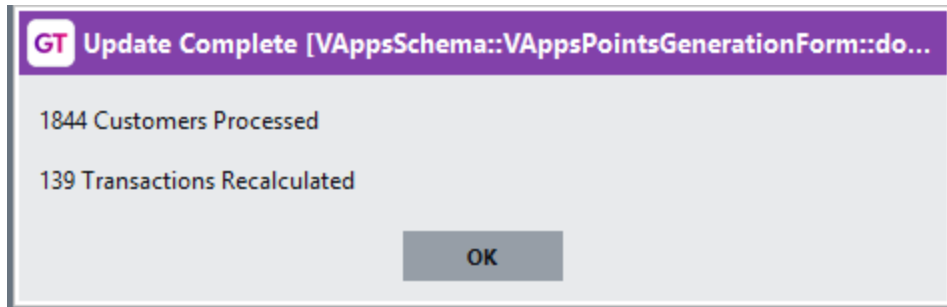
Select the last customer to recalculate points for – this defaults to the last customer giving the full customer range

Recalculate

Click this button to start the process and have points recalculated

Cancel

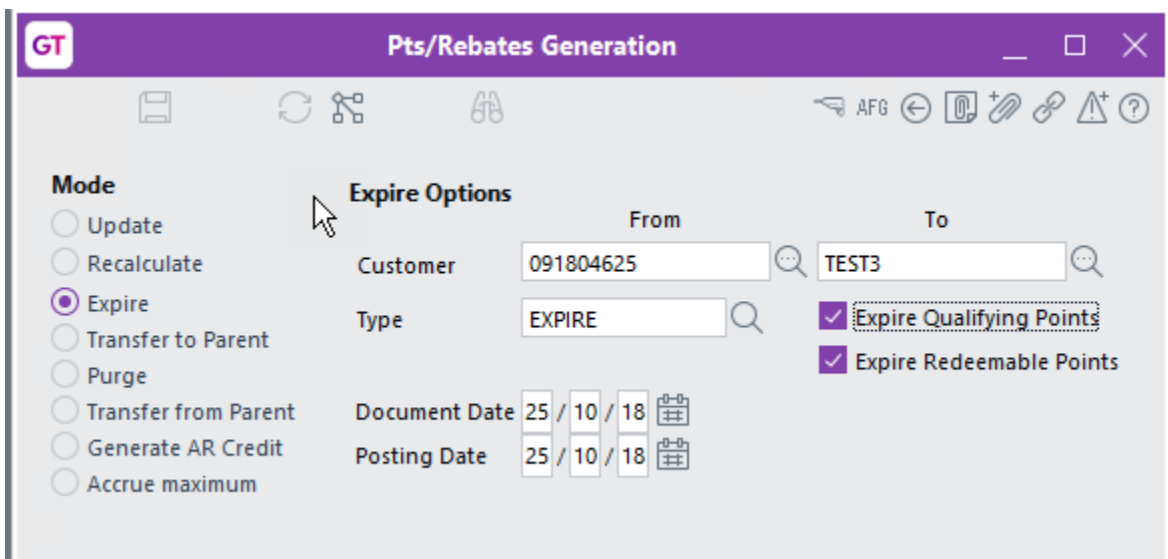
Click this button to close the form



A message is displayed advising how many customers and transactions have been recalculated.

EXPIRE

Expire is used to remove points that have not been used within the required time period.

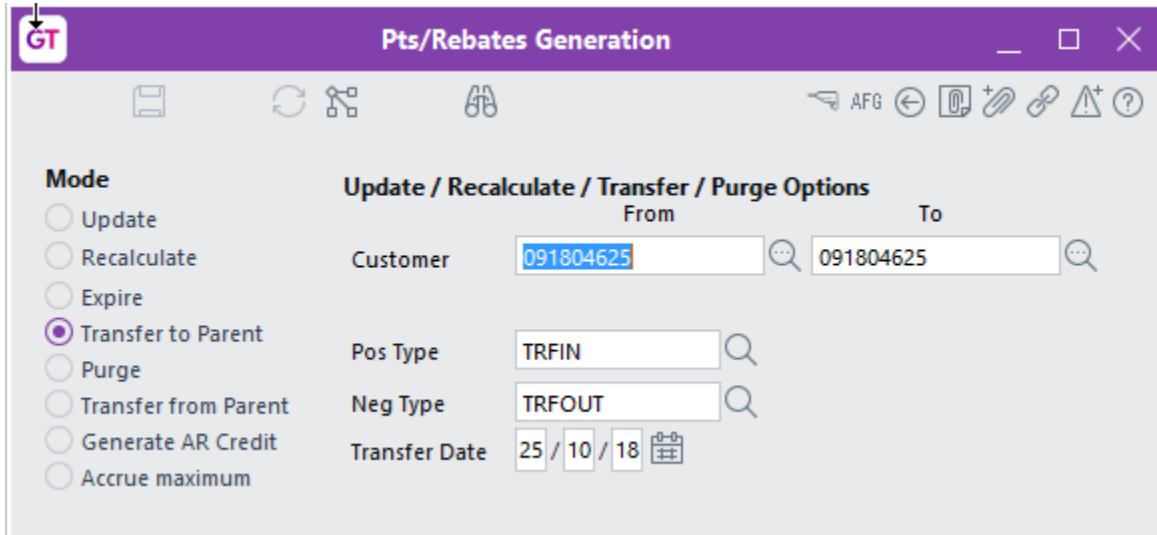


- Customer From** Select the first customer to expire points for – this defaults to the first customer in the database
- Customer To** Select the last customer to expire points for – this defaults to the last customer giving the full customer range
- Type** Select the transaction type that will expire or decrease the points for each customer
- Expire Qualifying Points** Check this box to expire qualifying points e.g. past sales no longer count in the qualifying sales value
- Expire Redeemable Points** Check this box to expire actual accrued points
- Document Date** Select the date for the transaction created to reduce the points
- Posting Date** Enter the date to be used for Points transactions

- Expire** Click this button to start the process and have points expire
- Cancel** Click this button to close the form

TRANSFER TO PARENT

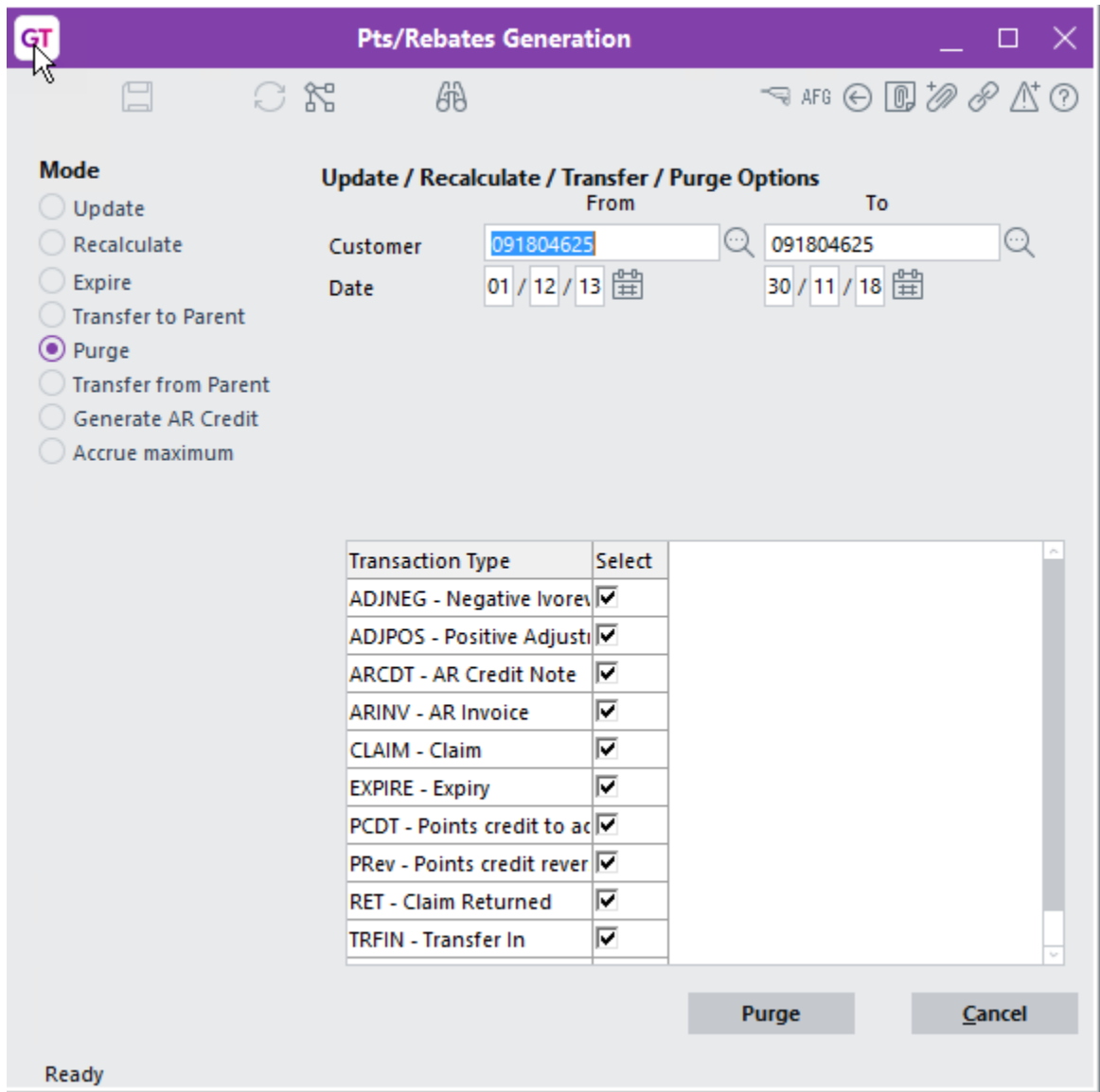
Transfer to Parent is used where points have accumulated on each child account and you now want to transfer them to the parent account. This is different to if the rule was ticked to Accumulate on Parent in which case the points would already be on the parent account.



- Customer From** Select the first customer to transfer points from – this defaults to the first customer in the database
- Customer To** Select the last customer to transfer points from – this defaults to the last customer giving the full customer range
- Pos Type** Select the transaction type that will accrue or increase the points on the parent account
- Neg Type** Select the transaction type that will decrease the points on each child account
- Transfer Date** Enter the date to be used for Points transactions
- Transfer** Click this button to start the process and have points transferred
- Cancel** Click this button to close the form

PURGE

Purge is used to remove points transactions that have been generated. It un-flags the original sales transactions so that next time an Update is run the transaction will be included. Run this option if points previously generated are incorrect.



Customer From

Select the first customer to purge points for – this defaults to the first customer in the database

Customer To

Select the last customer to purge points for – this defaults to the last customer giving the full customer range

Date From

Select the first date of transactions to be included in this process

Date To

Select the last date of transactions to be included in this process

Transaction Type

Select the transaction types you want to include in the purge

Purge

Click this button to start the process and have points purged

Cancel

Click this button to close the form

TRANSFER FROM PARENT

Transfer from Parent is used where points have accumulated on the parent account and you now want to split them out and show against each child account.

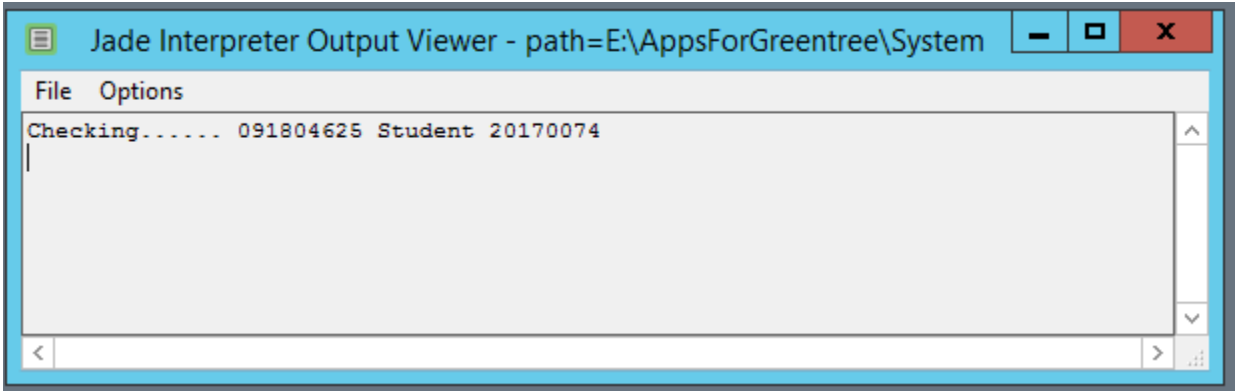
The screenshot shows a software window titled "Pts/Rebates Generation" with a purple header. On the left, under "Mode", the "Transfer from Parent" radio button is selected. On the right, under "Update / Recalculate / Transfer / Purge Options", the "From" and "To" fields both contain the customer ID "091804625". The "Pos Type" is "TRFIN" and the "Neg Type" is "TRFOUT". The "Transfer Date" is set to "25 / 10 / 18". A small arrow points to the "GT" logo in the top left corner of the window.

Refer to Transfer to Parent above for the details of the criteria

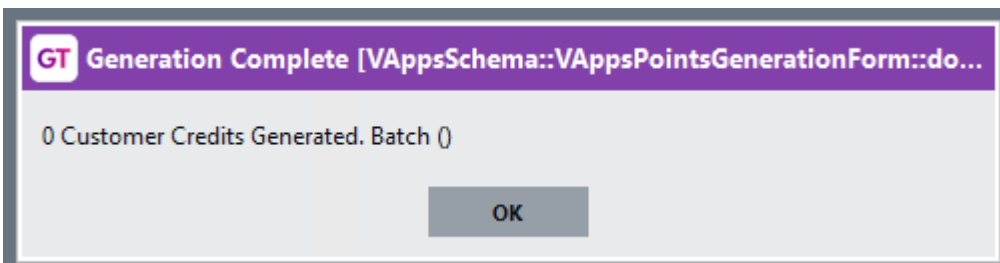
GENERATE AR CREDIT

Generate AR Credit is used where the points earned will be credited to the account as a rebate.

- Customer From** Select the first customer whose points will be credited – this defaults to the first customer in the database
- Customer To** Select the last customer whose points will be credited – this defaults to the last customer giving the full customer range
- Pos Type** Select the transaction type that will be used on the credit note to the customer account – must be linked to an IN transaction type belonging to AR that Increases inventory
- Neg Type** Select the transaction type that will be used on an invoice if the customer has had more credits than invoices so has negative points – must be linked to an IN transaction type belonging to AR that Decreases inventory
- Up To Date** Points transactions dated up to this date will be credited
- Posting Date** The credit note generated will have this posting date
- Generate** Click this button to start the process and have credit notes generated
- Cancel** Click this button to close the form



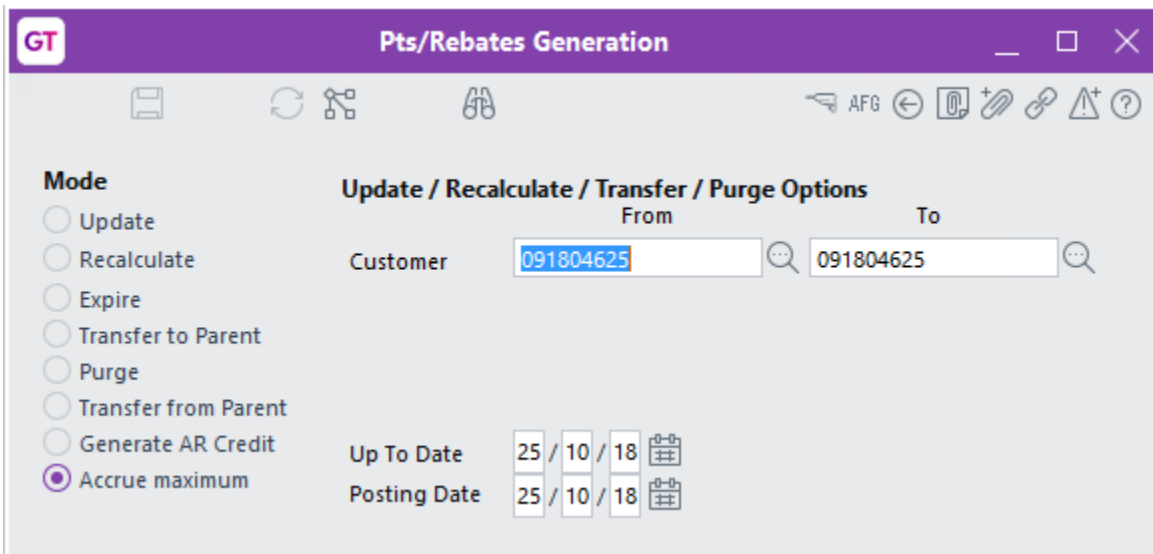
A Jade Interpreter window is displayed indicating which account is being processed



A message is displayed at the end giving the AR Credit Note batch number that has been generated.

ACCRUE MAXIMUM

Accrue maximum will generate a reversing GL journal to accrue to maximum what could be claimed by customers based on their current sales. This is based off the UDF field specified in App control and posts to the accounts specified in App control.



Customer From	Select the first customer you wish to calculate an accrual for – this defaults to the first customer in the database
Customer To	Select the last customer you wish to calculate an accrual for – this defaults to the last customer giving the full customer range
Up To Date	Sales transactions dated up to this date will be included in the accrual
Posting Date	The general ledger journal generated will have this posting date
Generate	Click this button to start the process and have generate the accrual
Cancel	Click this button to close the form

CUSTOMER MAINTENANCE

Customer maintenance has a new tab to let you see the points transactions that have been generated as well as any manual transaction.

1. Select the menu item | [Data Entry](#) | [Accounts Receivable](#) | [Customer Maintenance](#) |
2. Click on the [Points Transactions](#) tab

The screenshot displays the 'Customer Maintenance' application interface. At the top, there's a navigation bar with 'GT' and 'Customer Maintenance'. Below it, a search bar contains 'Code 1005' and 'Alpha WAGINS', with a name field 'Wagin Secondary'. The interface is divided into several tabs: 'Pts/Rebates Transactions' (selected), 'Child Balances', 'Master', 'Combined Billing', 'Label Printing', 'eDocs', 'Intercompany', 'Notes', 'Related', and 'Analysis'. Under 'Pts/Rebates Transactions', there are sub-tabs: 'Main', 'Defaults', 'Integration', and 'Credit'. The 'Points Enquiry' section shows a date range from '01/01/18' to '31/10/18' and transaction types 'ADJNEG' and 'TRFOUT'. The 'Loyalty Points Due to Expire' table shows points expiring by date: 30/10/2018 (0.0000), 30/11/2018 (0.0000), 31/12/2018 (0.0000), and Total Points to Expire by (0.0000). The 'Earned Balance' is 506.54, 'Qualifying Level' is 52320.12, and 'Last Update' is 31/10/18. A 'Search Now' button is present. Below the enquiry section is a table of transactions:

Customer	Reference	Tran Type	Rule	Document Date	Posting Date	Qualifying	Earned	Narration	arned Missed	Earned Reasc	Pending
1005-Wagin	1015_1	AR Invoice	SEP12BR	31/10/18	31/10/18	469.57	0.00	Invoice 1015	0.00		60.00
1005-Wagin	1015	AR Invoice	G1	31/10/18	31/10/18	904.35	0.00	Invoice 1015	0.00		78.09
1005-Wagin	1014	AR Invoice	G1	31/10/18	31/10/18	4474.78	506.54	Invoice 1014	0.00		0.00

You can select a [date range](#) to display points transactions for – this will default to the current Points year per the App module control.

You can select a [Transaction Type](#) range to display points transactions for – this defaults to all transaction types.

[Loyalty Points Due to Expire](#) – this shows points that will expire within the next three months – this is based on the UDF on the custom tab for the customer.

The [Earned Balance](#) shows the points available to be spent.

The [Qualifying Level](#) shows the value of sales transactions that have had points calculated.

[Last Update](#) displays the date that points were last generated.

Click [Search Now](#) to see the transactions.

GT Pts/Rebates Transaction Form

Transaction Detail

Reference: 1014
 Document Date: 31 / 10 / 18
 Posting Date: 31 / 10 / 18
 Type: ARINV
 Narration: Invoice 1014

Customer Detail

Code: 1005 Alpha: WAGINS
 Name: Wagin Secondary

Analysis	Stock Item	Location	UOM	Quantity	Qualifying	Earned	Total Qualifying	Total Earned	Narration	d Missed	Earned
ARINV	01AOPENAX4B533	01	Each	2.0000	2020.0000	242.4000	4040.0000	484.8000	Invoice 1014	0.00	
ARINV	PROMISETXT2RAID	01	Each	5.0000	86.9560	4.3480	434.7800	21.7400	Invoice 1014	0.00	

Read Only: Generated by Invoice 1014

You can double click to drill into any transaction and it will show you each line on the qualifying invoice and the points applied to that line.

POINTS TRANSACTION ENTRY

Points can be claimed by entering a Points transaction. This basically swaps points for other inventory items – these items might be vouchers or other products bought in specifically as prizes or they can be existing stock items.

1. Select the menu item | System | Points | Points Transaction Entry |

GT Pts/Rebates Transaction Form

Transaction Detail

Reference:
 Document Date: 31 / 10 / 18
 Posting Date: 31 / 10 / 18
 Type: CLAIM
 Narration:

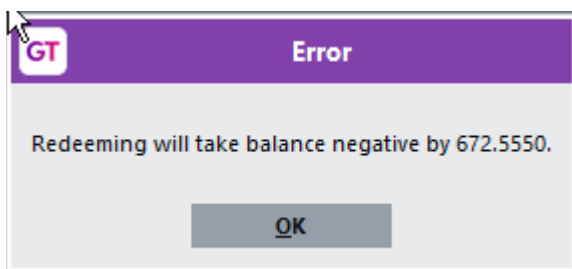
Customer Detail

Code: 1005 Alpha: WAGINS
 Name: Wagin Secondary

Analysis	Stock Item	Location	UOM	Quantity	Qualifying	Earned	Total Qualifying	Total Earned	Narration	d Mis
CLAIM	ACER17LCD	03.Z01	EA	1	172.5000	172.5000	172.5000	172.5000		

Reference	This can be left blank and will automatically generate based on App module control
Document Date	Enter the date for the points transaction
Posting Date	Enter the date you want this transaction to post to – this affects AR, IN and GL
Type	Select the Transaction Type for this transaction – this would normally be an IN AR transaction that decreases inventory – it will book out the prize being taken
Code/Alpha/Name	Select the customer who has claimed a prize
Narration	Type any information required e.g. contact person claiming and how the claim was made – email, web etc.
Analysis Code	This defaults from the transaction type
Stock Item	Select the inventory item that is the prize being claimed
Location	Select the location the item will be supplied from
UOM	Items selling unit will default
Quantity	Enter the quantity of this item being claimed
Qualifying	This is the value of points needed to claim the prize
Earned	This is the unit value of the prize based on the quantity and the price book specified in App module control
Qualifying Total	Qualifying multiplies by the quantity
Total Earnt	This is the total value of points being spent
Narration	Type any information required e.g. contact person claiming and how the claim was made – email, web etc.

Claim transactions can also be viewed via the Points transaction tab within Customer Maintenance.



If you try to claim more points than have been earned, you receive an error message.

POINTS WORKBENCH

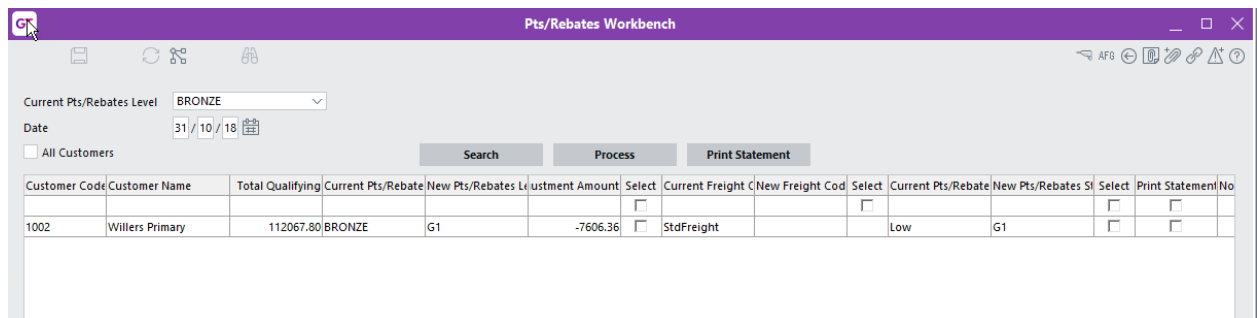
The **Points Workbench** is used to assign customers to a new **Points Level**. The screen displays details of current points level and whether based on the amount spent whether a customer should be moved to a new level, if so, it also details the adjustment to points earned.

If you also have the **Advanced Freight Module App** it can be used to assign a new Freight Code. Again, the existing Freight code is displayed and the new recommended Freight Code.

The screen displays whether the customer has registered via WebStore and whether they are on Stop credit. It also shows the current Aged Balances for each customer.

A **Points Statement** can be printed – this statement details what points have been earned and spent/claimed.

1. Select the menu item | System | Points | Points Workbench |



Current Points Level

Select a points level and you will see all the customers on that level and can evaluate if you need to make changes to their level, freight or print a statement

Date

enter the date that will be recorded if you change a points level and that will print on Statements

Search

Click to display customers on the Points Level selected

Process

Click this to Process the changes selected in the table – refer below

Print Statement

Click this button to Print statements for those customers selected in the “Print statement?” column

Customer	Customer Name	Total Qualifying	Current Points Level	New Points Level	Adjustment Amount	Select
1004	HighLake Primary	0.00	G1			<input type="checkbox"/>
1005	Wagin Secondary	54352.21	G1			<input type="checkbox"/>

The **Qualifying Spend** and current **Points Level** is displayed for each customer. If the customers spend entitles them to move up the next level, the new recommended level will be displayed in the

New Points Level column. Adjustment Amount will display the additional points the customer is now entitled to, based on the new level.

Tick Select if you want this customer moved to the next level. This will then happen, and a Points Adjustment transaction will be generated when you click the Process button.

Current Freight Code	New Freight Code	Select
		<input type="checkbox"/>
StdFreight		

The Current Freight Code and recommended New Freight Code are displayed.

Tick Select if you want to move the customers onto the new Freight Code. This will happen when you click the Process button.

Current Points Status	New Points Status	Select
		<input type="checkbox"/>
G1		
G1		

The Current Points Status and recommended New Points Status are displayed.

Tick Select if you want to move the customers onto the new Points Status – this is not changing between levels within a group but changing to a different Points Rule. This will happen when you click the Process button.

Notes	Registered	On Stop Credit?	Print Statement?	Total Overdue Balance	Overdue 2	Overdue 3	Overdue 4+
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12000.00	4800.00	0.00	7200.00
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	25645.15	5350.90	16454.25	3840.00

Notes

You can enter a note to record against any action you take e.g. change of Points Level

Print statement?

Check this box if you want to print a Points Statement for this customer. You then click the Print Statement button at the top.

All other fields are displayed for information purposes only.

SO ORDER ENTRY

If selected in App module control, points can be automatically redeemed in SO Sales Order Entry
| Data Entry | Sales Order | Sales Order Entry

The screenshot shows the 'SO Order Entry' application window. The interface includes a top navigation bar with the 'GT' logo and window controls. Below the navigation bar is a toolbar with various icons. The main area is divided into several sections:

- Sales Order:** Fields for Order Number (501039), Branch (01 (Auckland)), Order Date (31/10/18), Delivery Date (31/10/18), Location (01), Type, Status (Entered), and Entered by (SUPER).
- Customer Detail:** Fields for Code (1005), Name (Wagin Secondary), Currency (New Zealand), Rate (1.00000000), Discount (0.00 %), Salesperson (Sally Scoresby (SSc)), Payment Terms (30 Days from Invoice Date), Order Number, and Narration.
- Print Options:** Buttons for Packing Slip, Order Status, Invoice, On Hold, Cancel Order, and Save Header.
- Summary:** Fields for Discount (0.00), Surcharge (0.00), Net (150.00), Tax (22.50), Total (172.50), and Adv rec (0.00).
- Table:** A table with columns: Location, Price Book, Quantity, Price, Tax Code, Tax Amt, DelivDate, Total, Narration, and Status. The table contains two rows of data.
- Buttons:** A 'Points' button is highlighted with a red box on the right-hand side. Other buttons include 'Create Assembly', 'Print POs', and 'Create Buy-In'.
- Message:** A warning message is displayed at the bottom, stating: 'Unable to redeem [VAppsSchema::VAppsObjectLinkManager::btncl...]. All points have been applied to lines or no lines qualify for redemption.' The message includes a warning icon and an 'OK' button.

At the bottom of the window, there is a status bar with the text 'Line saved' and 'Sales Order 816 of 1043'.

There is a **Points** button on the right-hand side – this will apply points available for redemption. If no points are available, a message will be displayed.

UTILITY SCRIPTS

CHECK CUSTOMER POINTS BALANCE

This script will iterate through all Customers for the current company, and will check that their Points Balances are correct

GENERATE CUSTOMER POINTS

This script may be run manually or scheduled using the Greentree Task Scheduler, as an alternative to running the process from the **Points Generation** screen. Scheduling is an excellent option where you want points to be calculated and updated regularly – say on a daily, weekly or monthly basis - without relying on a user to remember.

NB: This script applies the default settings for the App, set up via the Apps Module Control screen.

IMPORT POINTS RULE LINE SCRIPT

Use this script to import points rules as an alternative to setting them up manually. This may be useful if the rules associated with your Loyalty or Rebates program are complicated or vary at a product, customer or category level.

Fields: Rule, Pts Qualift, Pts Redeem, isQual Per \$, isRedeem Per \$, isQual Per Qty, isRedeem Per Qty, Analysis Code, Stock/Sales Code, Customer Code, Stock Tree, User, Location, Narration

NB: for a better understanding of the fields shown above please refer to the Points Rule setup earlier in the document.

IMPORT CUSTOMER POINTS LEVEL

Use this script to import customer points level information from a comma delimited text file.

Fields: *Customer code, Points Level, Effective Date, Points Status, Freight Type (if using the Advanced Freight App)*

e.g. **1001,S1,01/02/2013,G2,StdFreight**

Code 1001 Alpha HIGHST Name Highstone

Freight/Points WebView Points Transactions

Main Defaults Integration Credit Deliver

Freight
Default Freight Type StdFreight

Points Detail
Points Status G2

Points Level	Effective Date	End Date
S1	01/02/2013	31/12/2013

NB: The End Date is automatically defaulted from “Current Year To” in the App setup.

If the Advanced Freight Module App is not used on the site, you may exclude the Freight Type field. The Jade interpreter will show the following error when the script is run, but the fields in the file are still imported.

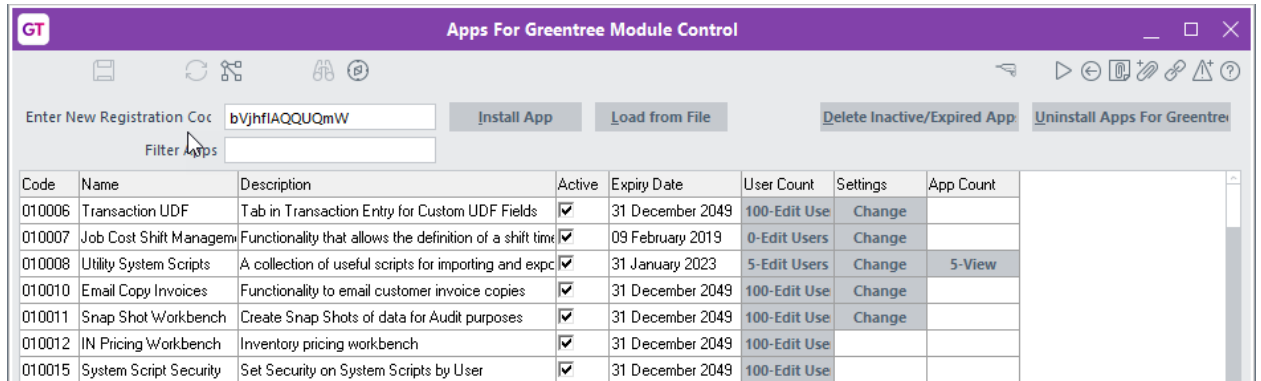
```
Invalid Freight Type:
Customer Points read :1
Customer Points rejected :1
Customer Points updated :0
```

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Enter the New Registration Codes supplied and click Install App



4. Select/Highlight the Points App.
5. Click on the Edit Users button and select the users who will be configured to use this App, for which companies.
6. Save and Close the form.

APP CONFIGURATION

1. Select the menu item | System | Apps For Greentree | Apps Module Control |
2. Select/Highlight the Points App.
3. Click on the Change button to configure the App for use.

Points Name

Type the name your company uses for the loyalty program – this is used on menu items within Greentree

Qualifying Points Name

Type the name for transactions that earn loyalty

Redeemable Points Name

This is the name for the loyalty redemption

Transaction Form

Select the Points transaction form

Points Price Book

Select the inventory price book used when determining how much a Prize is worth

First Points Ref	When you accrue Points a Points transaction is generated. This is the start number for the range
Last Points Ref	Type the end of the range for Points transactions
Next Points Ref	Initially set this to the same as the First Points Ref. This will be updated by the system automatically
Positive IN Trans Type	Select the IN transaction type that increases points for a customer
Negative IN Trans Type	Select the IN transaction type that decreases points for a customer
Def Pos Points Type	You will not be able to complete this yet, leave blank
Def Neg Points Type	You will not be able to complete this yet, leave blank
Minimum Claim Points	If there is a minimum points that can be claimed/redeemed at any time enter the value here
Auto Expiry Customer Points Groups	If points are to auto expire check this box
Use Detailed Transfers	If you want to transfer Points between customer accounts, and you want the detail associated with the transfer, check this box
Current Year From Date	The time period for points can be accruing and expiring can be independent of the financial or other calendar. Enter the start date for the year
Current Year To Date	Enter the end of the current Points year – the year does not have to be a full 12 months if you are introducing or changing a Points program
Current Year Lapse Date	Enter the Date on which current year Points will expire
Points Tree	The tree which has the prizes assigned to it, used to display prizes in WebStore
Claim Email Address	Enter the email address claims can be sent to – this integrates with WebStore
Claim Period From	Date after which a customer can start claiming points – displayed in WebStore
Credit Stock Item	Select the stock item used when a customer redeems points as a credit to their account
Use Accruals	Check this box if you want to accrue Points in General ledger
Rebate UDF	Select the customer user field you will enter the % to accrue into
Debit Account	Select the GL account that the accrued expense will update

Credit Account	Select the GL account that the accrued liability will update
Must Pay On Time And In Full	Check this box if invoices must be paid on time and in full before points are earned
Paid In Full Tolerance	If an invoice can be deemed paid in full with a small discrepancy, enter that tolerance value
Allow Payment to be made by Month	Check this box if payment in full is by end of the month, if not checked payment must be by the exact due date
Allow Points To Be Used on SO Entry	Check this box to prompt in SO Entry if points are available for redeeming
Restrict Points Redeem On IN Stock With UDF Redeemable	Check this box to only allow points redemption on specified items
Redeem Trans Type	Select the Transaction type to be used when points are redeemed
Redeem Stock Item	To use a stock item to redeem points rather than a non-stock code, select the item here
Admin Fee Code	Select the non-stock code to be used to add a points admin fee to the sales order
Redeem Code	Select the non-stock code to add when points are redeemed – if not using a stock item
Expire Points by Month	Check this box if points expire each month rather than for the whole year
Default Pos Points Type Transfer	Select the transaction type to be used for a positive points transfer to a customer
Default Neg Points Type Transfer	Select the transaction type to be used when transferring points from a customer
Hide Update Button on Customer Maintenance Form	Check this box if prevent users doing an adhoc update of points from within customer maintenance
Display Transactions by Document Date in Customer Maint	Check this box to view points transactions based on date
Default search to Current Year to Date	Check this box to have the enquiry default to the current year
Show Expiring Points on Customer	Check this box to show the points expiring in customer maintenance

4. Click **Save**
5. **Escape** to Close the form

Logout and Back in to activate further menu items.

Points Analysis codes, Transaction Types, Rules and Levels now need to be created.

OTHER GREENTREE CONFIGURATION

Complete the following set-up in Greentree after configuring the App.

POINTS ANALYSIS CODES

You need to setup Points Analysis Codes to match all the inventory transaction types created within the App configuration. As a minimum you need an analysis code to Accrue Points, to Credit points (credit note issued), and to Redeem a prize. Other optional analysis codes could be used if you wish to Credit an account, Transfer points to another account, Expire points, Manually adjust points.

1. Select the menu item | [System](#) | [Points](#) | [Points Maintenance](#) | [Points Analysis Codes](#) |

The screenshot shows a software window titled "Pts/Rebates Analysis Codes". The window has a purple header bar with the "GT" logo and standard window controls. Below the header is a toolbar with icons for file operations and navigation. The main area contains a form with the following fields:

- Code:** A text input field containing "Accrual".
- Description:** A text input field containing "Points accrual".
- Transaction Type:** A dropdown menu showing "PAccr".
- AR Transaction:** An unchecked checkbox.
- Warn if Earned > Qualifying:** An unchecked checkbox.
- Warn if No Stock Item Selected:** An unchecked checkbox.
- Default Qualifying to 0:** An unchecked checkbox.

The status bar at the bottom of the window displays "Ready" on the left and "Pts/Rebates Analysis Code 3 of 10" on the right.

Code

Type the name for analysis code

Description

Type the description for the Analysis code – should indicate what the analysis code is used for.

Transaction Type

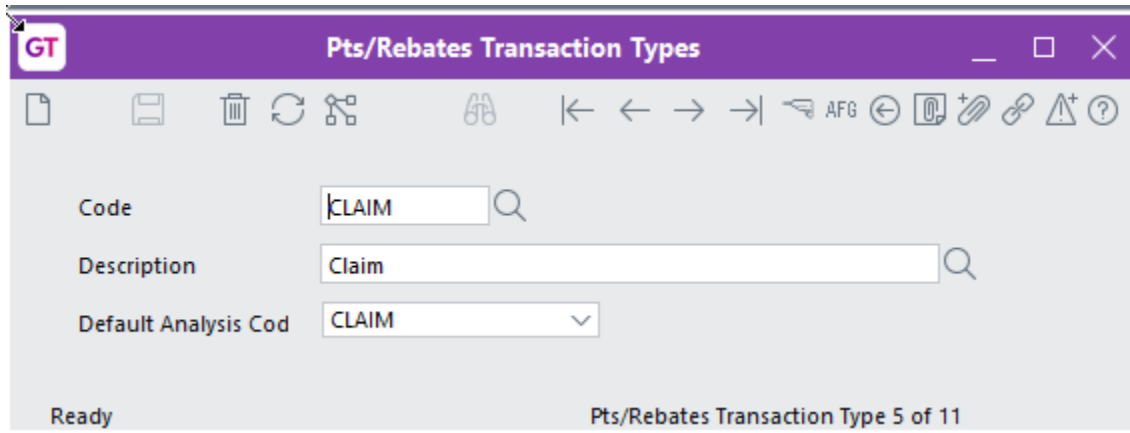
Select the matching inventory transaction type for this analysis code. If the transaction is an AR transaction e.g. Credit to account on redeeming points, then you need to tick AR Transaction prior to selecting the Transaction Type

- Warn if Earned > Qualifying** Check this box if you need a warning at the time of entering a transaction using this analysis code if the points Spent are more than has been Earned – this would be required for a Redemption analysis code
- Warn if No Stock Item Selected** Check this box if you want a warning at Points transaction entry if a stock code has not been selected – this would be required for a Redemption analysis code
- Default Qualifying to 0** Check this box if points Earned should not be affected by the transaction – this would be required on a Transfer analysis code

POINTS TRANSACTION TYPES

You also need to setup Points Transaction Types to match all the Points Analysis Codes created above. It is recommended that Transaction Type names are matched to Analysis Code names.

1. Select the menu item | [System](#) | [Points](#) | [Points Maintenance](#) | [Points Transaction Types](#)

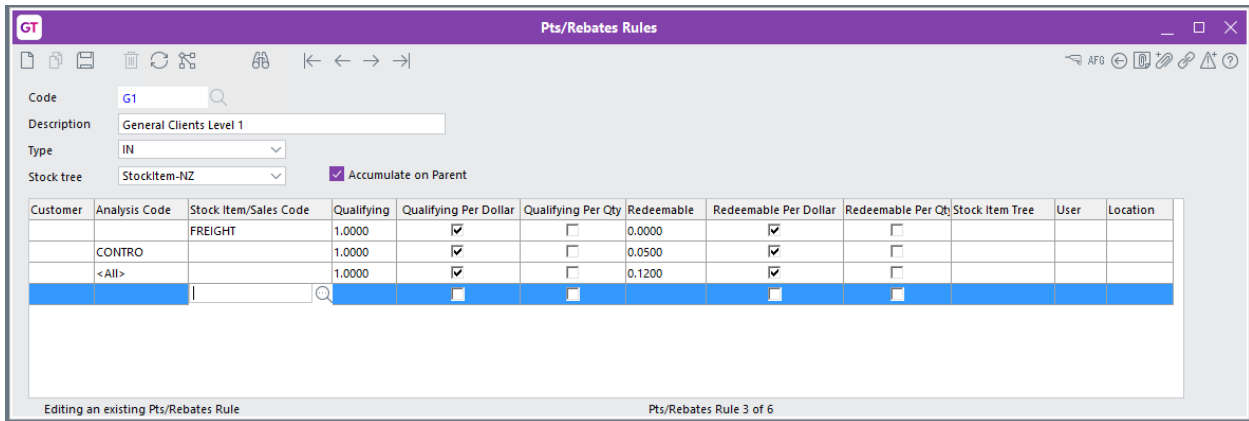


- Code** Type the code for transaction type
- Description** Type the name for transaction type
- Default Analysis Code** Select the matching Analysis Code

POINTS RULES

You create rules which specify how customers earn points. Each rule will apply in the order specified, as soon as one line applies no further lines are calculated so the most specific criteria needs to be first.

1. Select the menu item | [System](#) | [Points](#) | [Points Maintenance](#) | [Points Rules](#) |



Code

Type a code for the Rule you are setting up

Description

Type a name for the rule – should indicate who the rule applies to and what level it is if there are multiple levels

Type

Select whether the rule applies to IN or JC sales lines

Stock Tree

Select the stock tree to be used for selecting items – only applies where a rule detail is not specific to an inventory item or analysis code

Accumulate on Parent

Check this box if earned points are to go to the parent account

2. Now enter the details of this rule

Customer

If this criteria applies to a specific customer then select them here

Analysis code

If the rule applies to all items within an IN analysis group then select the group here

Stock Item/Sales Code

If this criteria relates to a specific stock code or JC sales code, select the code here

Qualifying

Nominate the qualifying amount before points are earned – this may be dollars or quantity depending on the next check boxes

Qualifying Per Dollar

Check this box if sales qualify per dollar

Qualifying Per Quantity

Check this box if sales qualify per quantity

Redeemable

How many points are Earned or able to be Redeemed per Qualifying value

Redeemable Per Dollar

Check this box if Points are Value based

Redeemable Per Qty

Check this box if Points are a quantity

Stock Item Tree	If the line does not apply to a specific stock code or an analysis code, you must pick a stock tree or specific branch of a tree
User	If the rule applies to sales entered by a particular user select them here
Location	If the rule applies to items sold from a specific location select it here
Narration	Type any explanation you want recorded about what the line is for

In the above example every dollar spent on freight earns 0 dollars e.g. no points for freight charge. Anything sold from the Analysis Code CONTRO earns 5% for each dollar spent. The last line catches all other products and gives 12% for every \$1 spent. Rules can also be setup to use quantities not just dollars. You must select either a stock item, analysis code or stock tree on every line.

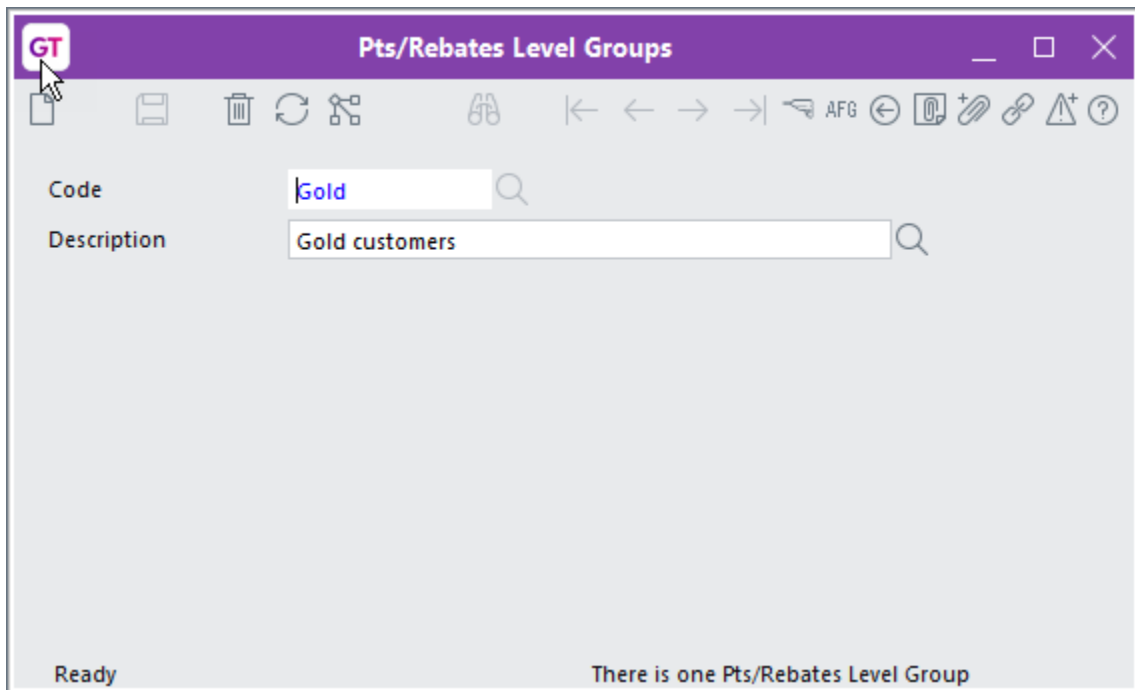
Note: wording of Qualifying and Redeemable alter depending on what was selected in App Module Control.

3. Enter all rules and their detail as required saving each one

POINTS LEVEL GROUPS

If different groups of customers get different points e.g. some get it on all purchases and others get it on only a specific range or if they get different points value for the same item, and there are different levels of points available within the group e.g. what they earn goes up depending on what they spend, then you need to create Points Level Groups.

1. Select the menu item | [System](#) | [Points](#) | [Points Maintenance](#) | [Points Level Groups](#) |



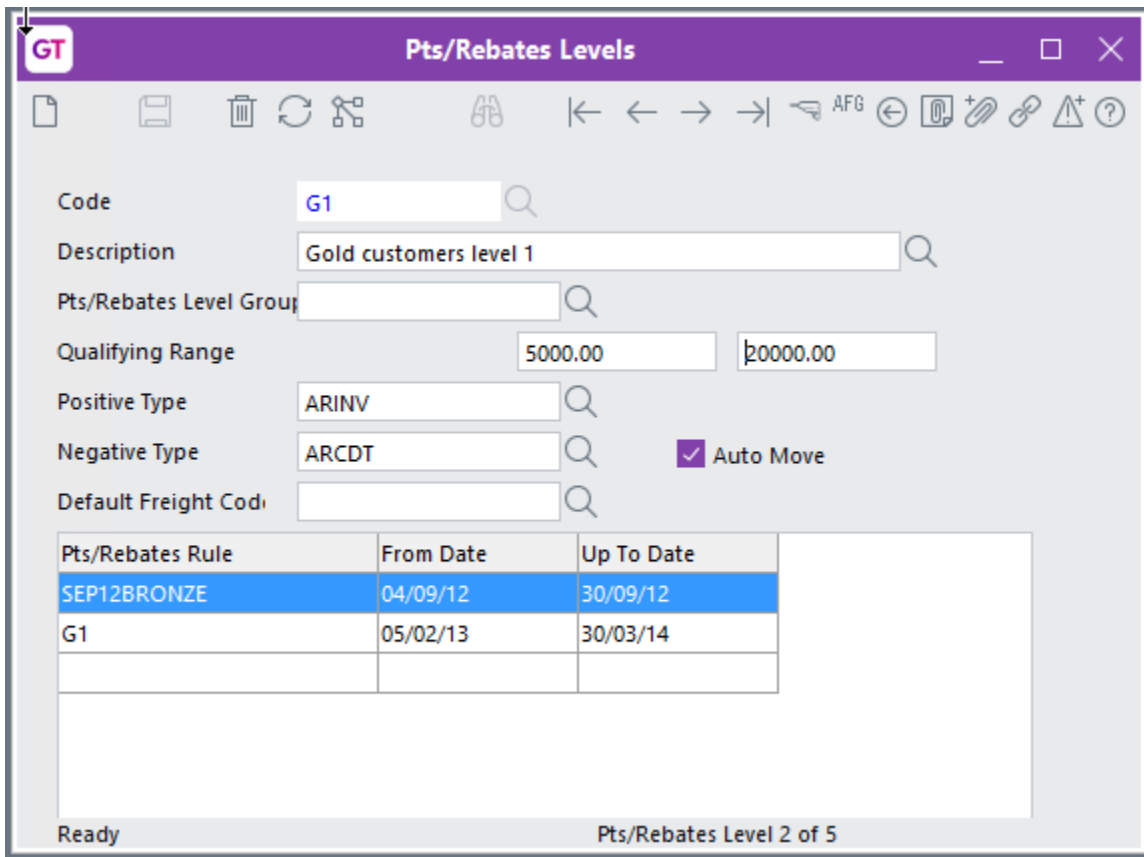
Code Type the code for the group of customers

Description Type the name for group of customers – this should indicate who is in the group

POINTS LEVELS

Levels make it possible for customers to earn different points based on spend values. If points earned does not change then specify a high top value for the Earned range and only have one level.

1. Select the menu item | System | Points | Points Maintenance | Points Levels |



Code Type a code for this level

Description Type a description which indicates which customers (if possible) and what level this is

Points Level Group Select the Group this Level applies to – may be left blank

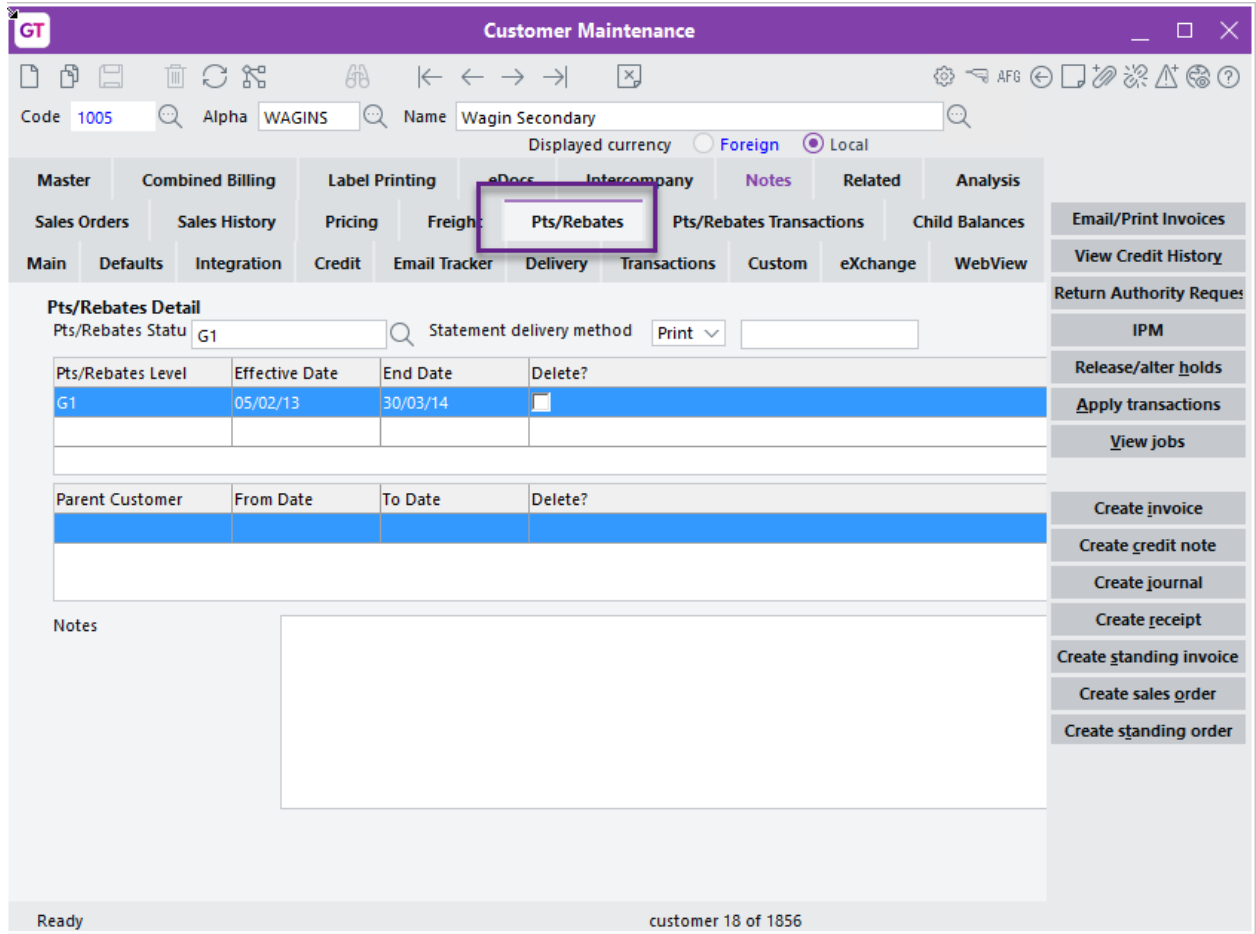
Earned Range enter the minimum spend and maximum spend that this rule applies to – in the above example as this is level 1 the customer does not get anything unless they spend at least \$5,00 and they move to the next level once they are over \$20,000

Positive Type	Select the Points transaction type to be used when accruing/earning these points
Negative type	Select the Points transaction Type to be used for credits or decreases in points
Auto Move	Check this box if you want the system to automatically move the customer to the next level if they reach the maximum spend
Default Freight Code	Select the default freight code to apply to these customers – only applicable if also using the Advanced Freight Module App
Each level can apply multiple rules – you may have a general rule to apply then for a promotional month you may apply an additional rule to accrue more points.	
Points Rule	Select the Rule to apply for this level
From Date	Enter the start date for this rule – this allows you to change the terms and have a new rule apply from a specified date
To Date	Enter the date when this rule expires or is no longer applicable

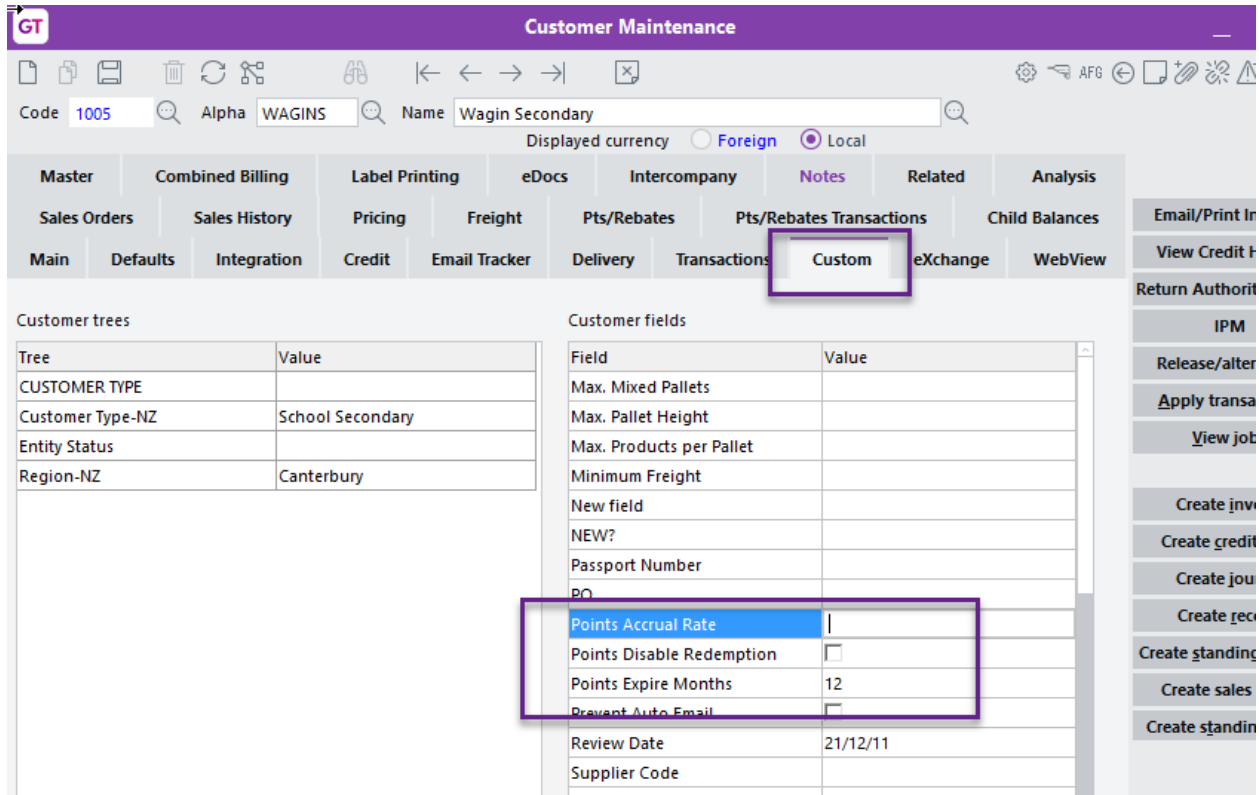
CUSTOMER MAINTENANCE

Once all the rules have been setup, each customer needs to be assigned to the correct rule and level.

1. Select the menu item | [Data Entry](#) | [Accounts Receivable](#) | [Customer Maintenance](#) |



2. Click on the **Points** tab
3. For new customers select the Points Status – this is the level they will start on for points
4. Statement delivery method – if you are sending Points statements select how these are sent; if by email enter the email address they are to go to
5. Select the Points Level (same as above for new customers)
6. Enter the date range the customer will be on this level for. End Date is a mandatory field – you should enter the date the customers contract is reviewed or else put this a long way in the future
7. If the points accrue to a Parent Customer rather than each child, select the parent
8. Notes – Enter any notes other users need to be aware of
9. **Save** and close



There are also some optional UDF fields for some of the Points functionality – UDF’s must be setup in usual manner first.

Points Accrual Rate – if you want to accrue points for customers based on their spend, you can enter an accrual rate in the relevant UDF.

Points Disable Redemption – check this if this customer account is not allowed to redeem points – this might be used where you have multiple branches for a customer and all points redemption is done by head office.

Points Expire Months – If you want customers to use their points within a time frame you can set the number of months in this field.

INVENTORY ITEM MAINTENANCE

If you selected to restrict Points Redeem on IN Stock, you need to create a UDF called Redeemable, and set this to true for the items you want customers to be able to redeem points on.

[| Data Entry | Inventory | Inventory Item Maintenance](#)

The screenshot shows the 'IN Inventory Item Maintenance' window with the following details:

- Code:** ACER17LCD
- Description:** Acer 17" LCD Monitor
- Current Tab:** Custom
- Inventory item trees table:**

Tree	Value
AllStock	All
Analysis Category	
Contract	
Courier	
Dimensions Colour Tree	
Dimensions Size Tree	
Items by Manufacturer	Acer
Key Category	A
Packaging Type	
Prize Tree	
Product Catalogue	CPU
- Inventory item fields table:**

Field	Value
MPN	
PO	
Product Barcode	
Product Recall	<input type="checkbox"/>
ProductionHours	
Quantity	
Rate	
Redeemable	<input checked="" type="checkbox"/>
RoHS	
Satchel Code	
SPQ	
Start Date	
- Transaction trees table:**

Tree	Available	Mandatory
- Transaction fields table:**

Field	Available