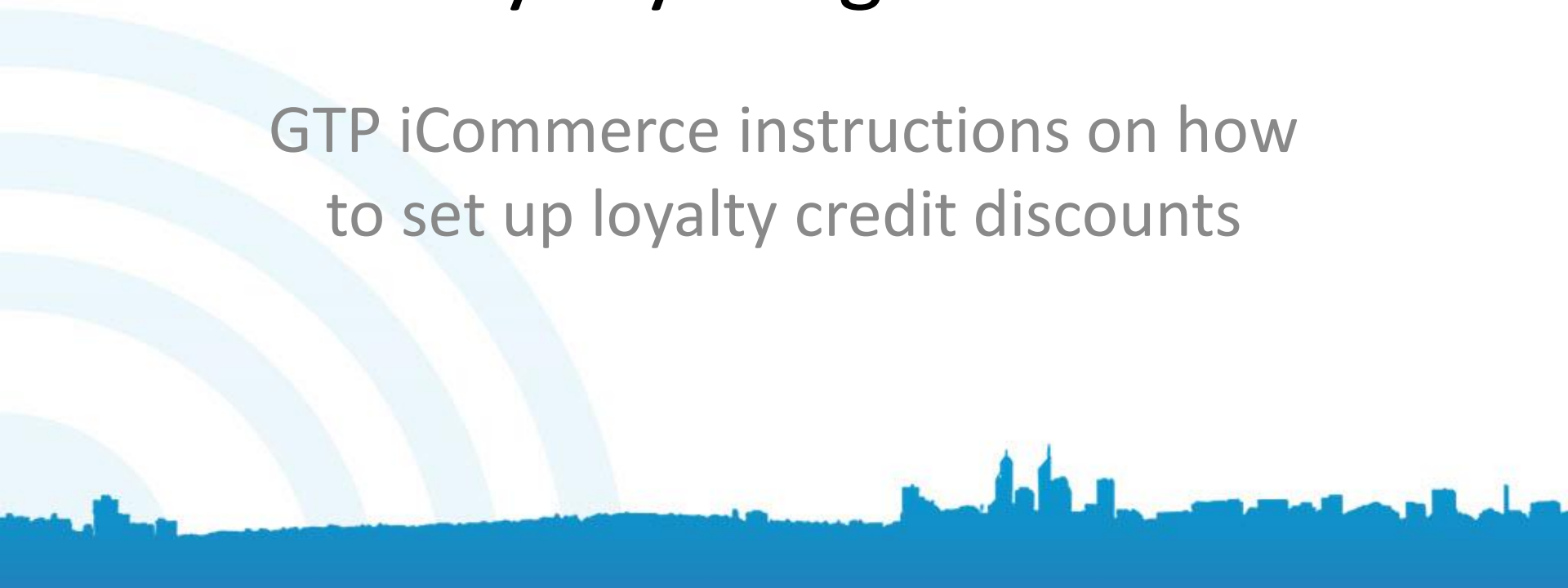


Loyalty Credit Discounts for Loyalty Programme

GTP iCommerce instructions on how to set up loyalty credit discounts



Disclaimer

- The loyalty credit functions are only available on Darth CMS web sites.
- Additional Setup Fees may apply for web sites wishing to use the loyalty credit functions described in this document or modification to suit their purposes, if they do not have a Darth web site.
- This document describes the default setup that is set up the easiest.

LOYALTY Credit DISCOUNTS

- Loyalty credits are rewards direct to the purchaser or user
- This is different to affiliate credit which is a reward given to one person (person A) based on someone else (person B) making a purchase (that person A triggered by telling person B about)

LOYALTY Credit

- Loyalty credit is expressed in monetary terms.
- E.g. \$0.85
- The client **Needs to be logged on to the website** to use any credit (this won't change) gained from purchases (both loyalty or affiliate)

Setting the Percentage of Product Price as Loyalty Credit Value


- Loyalty credits are calculated based on the purchase price of the products being purchased
- Calculation of Loyalty credits excludes postage and freight costs
- It excludes discount amounts. i.e. if the products total was \$100 and a discount voucher of \$20 was applied. Only \$80 should earn the loyalty credits.

Setting the Percentage of Product Price as Loyalty Credit Value

- Loyalty credits are calculated as a percentage of the product value being purchased.
- For example if the Rate set is 5% then on a \$100 purchase, \$5.00 credit should be accumulated to put against future purchases




Setting the Loyalty Credit Rate as a Percentage



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 Marketing
 DETERMINE LOYALTY COMMISSION RULES

These rules determine the calculation of loyalty credit to customers

Check each rule and add a value that will apply to your loyalty credit calculation

NOTE: All calculations are based on the total amount of products purchased

Flat Dollar/Percentage Calculation from a Loyalty Member Purchase

Flat Amount ☐
 Description A flat amount that accrues as a loyalty credit to a member from a purchase
 \$ Value of Rule

Percentage ☒
 Description The percentage that is calculated and accrues as a loyalty credit to a member from a purchase
 % Value of Rule

Other Rules


Apply Rule ☒
 Description The minimum total of ordered products before the loyalty credit is applied
 \$ Value of Rule

Apply Rule ☒
 Description The maximum loyalty credit that can be accrued on any order
 \$ Value of Rule

Apply Rule ☒
 Description The minimum loyalty credit that can be used on any order
 \$ Value of Rule

Apply Rule ☒

Set percentage as a whole number






Percentage of credits


- The percentage option allows you to set a rate at which customer credit is calculated.
- The customer receives a credit for a future purchase based on a percentage of their total purchase value
- **Example.** 5% will calculate to a \$5 credit for a purchase value of \$100

Setting a Flat Amount for Loyalty Credits for Product Purchases



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Marketing

DETERMINE LOYALTY COMMISSION RULES

These rules determine the calculation of loyalty credit to customers
Check each rule and add a value that will apply to your loyalty credit calculation

NOTE: All calculations are based on the total amount of products purchased

Flat Dollar/Percentage Calculation from a Loyalty Member Purchase

☒ Flat Amount
Description A flat amount that accrues as a loyalty credit to a member from a purchase
\$ Value of Rule

☐ Percentage
Description The percentage that is calculated and accrues as a loyalty credit to a member from a purchase
% Value of Rule

Other Rules

☒ Apply Rule
Description The minimum total of ordered products before the loyalty credit is applied
\$ Value of Rule

☒ Apply Rule
Description The maximum loyalty credit that can be accrued on any order
\$ Value of Rule

☒ Apply Rule
Description The minimum loyalty credit that can be used on any order
\$ Value of Rule

☒ Apply Rule

Insert a flat amount of credits



Flat Amount

- The flat amount option for calculating a customer credits enables you to give a fixed dollar amount of credit to a customer as a reward for purchasing from you.
- The amount given is not related to the actual purchase value.
- **Example:** If 20 is the flat credit amount then \$20 of credit is given to the customer for their next purchase.

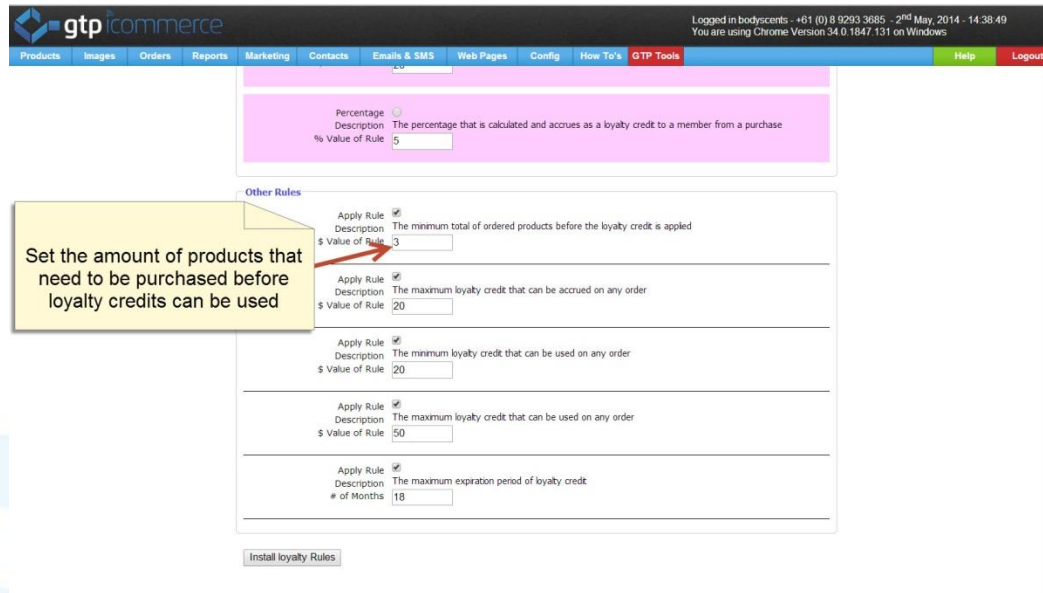
Other Rules

- These rules establish when loyalty credit can be given AND how loyalty credits can be used.

E.G.

- Only give loyalty credits for purchase values over \$100
- AND Only allow use of loyalty credits for purchase values over \$150
- Only allow loyalty credit to be used when it reaches more than \$20.00 (This is the best one)

Minimum Total of Ordered Products Before Loyalty Credit is Applied



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Products Images Orders Reports Marketing Contacts Emails & SMS Web Pages Config How To's **GTP Tools** Help Logout

Percentage
Description The percentage that is calculated and accrues as a loyalty credit to a member from a purchase
% Value of Rule 5

Other Rules

Apply Rule ☒
Description The minimum total of ordered products before the loyalty credit is applied
\$ Value of Rule 3

Apply Rule ☒
Description The maximum loyalty credit that can be accrued on any order
\$ Value of Rule 20

Apply Rule ☒
Description The minimum loyalty credit that can be used on any order
\$ Value of Rule 20

Apply Rule ☒
Description The maximum loyalty credit that can be used on any order
\$ Value of Rule 50

Apply Rule ☒
Description The maximum expiration period of loyalty credit
of Months 18

Install loyalty Rules

Set the amount of products that need to be purchased before loyalty credits can be used

This sets the minimum value an order needs to reach before the customer can benefit from earning loyalty credits.

Maximum Loyalty Credit That Can be Accrued on Any Order

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Products Images Orders Reports Marketing Contacts Emails & SMS Web Pages Config How To's GTP Tools Help Logout

Percentage
Description The percentage that is calculated and accrues as a loyalty credit to a member from a purchase
% Value of Rule 5

Other Rules

Apply Rule ☒
Description The minimum total of ordered products before the loyalty credit is applied
\$ Value of Rule 3

Apply Rule ☒
Description The maximum loyalty credit that can be accrued on any order
\$ Value of Rule 20

Apply Rule ☒
Description The minimum loyalty credit that can be used on any order
\$ Value of Rule 20

Apply Rule ☒
Description The maximum loyalty credit that can be used on any order
\$ Value of Rule 50

Apply Rule ☒
Description The maximum expiration period of loyalty credit
of Months 18

Install loyalty Rules

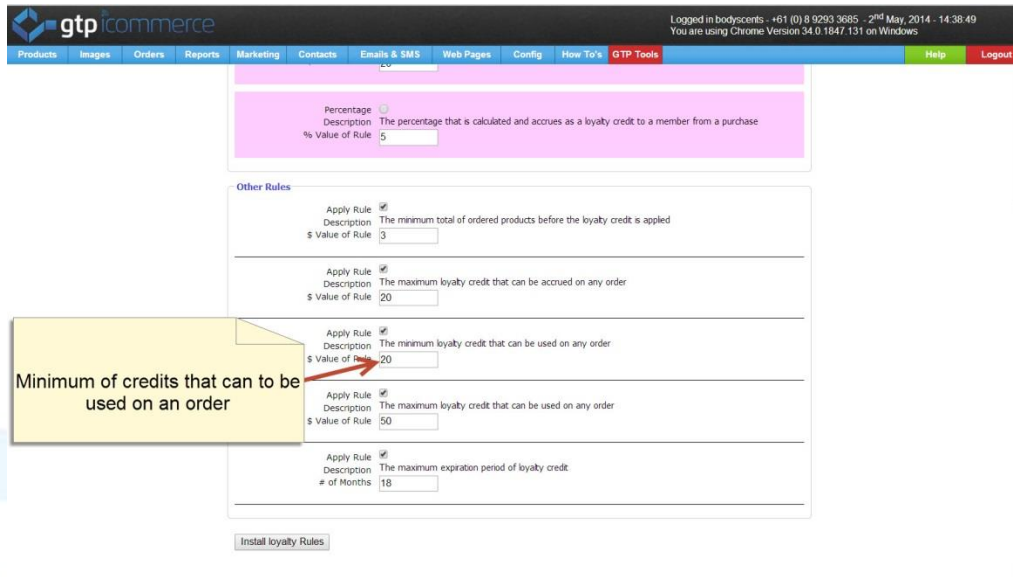
The max limit of credits that can be gained from one order

This is to stop loyalty credits being given that are too generous.

If a customer places a \$2000 order you may want to cap the amount of loyalty credit given for each purchase.

This option gives you that control.

Minimum Loyalty Credit Used on Any Order



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Apply Rule ☒
Description The minimum loyalty credit that can be used on any order
\$ Value of Rule 20

Apply Rule ☒
Description The maximum loyalty credit that can be used on any order
\$ Value of Rule 50

Apply Rule ☒
Description The maximum expiration period of loyalty credit
of Months 18

Install loyalty Rules

This sets a minimum amount of credits that have to be used on a purchase.

This means that the customer will likely have to make multiple purchases before they will be able to benefit from earning loyalty credits.

Maximum Loyalty Credit That Can be Used on Any Order

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Description The percentage that is calculated and accrues as a loyalty credit to a member from a purchase
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\$ Value of Rule 20

Apply Rule ☒
Description The minimum loyalty credit that can be used on any order
\$ Value of Rule 20

Apply Rule ☒
Description The maximum loyalty credit that can be used on any order
\$ Value of Rule 50

Apply Rule ☒
Description The maximum expiration period of loyalty credit
of Months 18

Install loyalty Rules

This is to stop customers from using a large collection of loyalty credits in one purchase.

Preventing large expenditures of credits on a single order is preferential as it requires the credits to be spread out over multiple purchases.

Maximum Expiration period

The screenshot shows the gtpcommerce admin interface. At the top, there's a navigation bar with links: Products, Images, Orders, Reports, Marketing, Contacts, Emails & SMS, Web Pages, Config, How To's, GTP Tools, Help, and Logout. The main content area is titled 'Percentage' and contains a form for configuring loyalty rules. The first rule is 'The percentage that is calculated and accrues as a loyalty credit to a member from a purchase' with a value of 5. Below this, there's a section 'Other Rules' with four more rules, each with a checkbox and a description. The last rule, 'The maximum expiration period of loyalty credit', is highlighted with a yellow callout box. The callout box contains the text 'Amount of time in months, before credit expires' and an arrow pointing to the value 18 in the input field.

Percentage

Description: The percentage that is calculated and accrues as a loyalty credit to a member from a purchase

% Value of Rule: 5

Other Rules

Apply Rule: ☒ The minimum total of ordered products before the loyalty credit is applied

Description: The minimum total of ordered products before the loyalty credit is applied

\$ Value of Rule: 3

Apply Rule: ☒ The maximum loyalty credit that can be accrued on any order

Description: The maximum loyalty credit that can be accrued on any order

\$ Value of Rule: 20

Apply Rule: ☒ The minimum loyalty credit that can be used on any order

Description: The minimum loyalty credit that can be used on any order

\$ Value of Rule: 20

Apply Rule: ☒ The maximum loyalty credit that can be used on any order

Description: The maximum loyalty credit that can be used on any order

\$ Value of Rule: 50

Apply Rule: ☒ The maximum expiration period of loyalty credit

Description: The maximum expiration period of loyalty credit


of Months: 18

Amount of time in months, before credit expires

The expiration period allow you to set the amount of time in months, before the credits a customer has gained through purchases will expire and therefore no longer useable.

This encourages customers to use their credits before they expire.

Install Loyalty Rules



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Apply Rule ☒
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 \$ Value of Rule

Apply Rule ☒
 Description The maximum loyalty credit that can be used on any order
 \$ Value of Rule

Apply Rule ☒
 Description The maximum expiration period of loyalty credit
 # of Months

Once you have finished setting the rules, click the Install loyalty Rules button

End of Section



Assigning Loyalty Credit Retrospectively to Customers

How to assign loyalty credit based on
customers previous orders




Assigning Loyalty Credit to Orders

- This new feature provides the ability to add loyalty credit retrospectively to customers orders.
- The amount of credit added is based on the current rules set in place for loyalty credit.



Login to the CMS



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[Web Pages](#)
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[Help](#)
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Office Hours

Opening Hours

Monday - Friday 9:00am to 4:30pm
 AWST +08:00
 Weekend and After Hours Support
 on 0411 352 766 (Mobile)
 Send **ALL** work requests to
support@gtp.com.au

PLEASE NOTE: GTP will be closed for
 all **Western Australian** public holidays
 for **2014** as follows:

- Good Friday - Friday 18 April
- Easter Monday - Monday 21 April
- ANZAC Day - Friday 25 April
- Western Australia Day - Monday 2 June
- Queen's Birthday - Monday 29 September
- Christmas Day - Thursday 25 December
- Boxing Day - Friday 26 December

Scheduled Holidays

- Dale - None currently scheduled
- Bruce - None currently scheduled
- Clayton - None currently scheduled
- James - None currently scheduled
- Daniel - None currently scheduled
- Gary M - None currently scheduled
- Janina - None currently scheduled

Last Updated: 8:03 AM April 11th 2014

Marketing

Customer Credit

- Customer Credit Rules
- Debit For Cash Out's
- View Cash Out List
- View Credit Transaction

Referral Programme

- Referral Commission Rules
- Referral Stats
- Referring Websites
- Add & Edit Banners

Promotional Tools

- Promotional Code Stats
- Content...

Loyalty Programme

- Loyalty Commission Rules
- Assign Credit to Orders

Campaigns for Purchases

- List & Edit Campaigns
- Add Campaigns
- Search Campaigns

Vouchers for Purchases

- List & Edit Vouchers
- Add Vouchers
- Search Vouchers
- Import Vouchers

Vouchers for Products

- List & Edit Product Vouchers
- Add Product Vouchers

SEO Tools

- Sitemap Generator *Coming soon!*
- MyShopping Product Export

Export

Click on Assign Credit to Orders


GTP iCommerce will close for Christmas and New Year at 4:00pm Friday 20th of December 2013 and will re-open at 9:30am on Monday 6th of January 2014. Normal after hour contact details will apply for emergencies during this period.

The last day we can accept updates for completion this year is Monday December 9th. Work requests received after this date can not be guaranteed to be processed until January.

GTP would like to take this opportunity to wish all our clients and customers a happy and safe Christmas, and a profitable 2014!


--The Team at GTP

Choose the Status and Date of the Orders you Wish to View



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Marketing

GENERATE LOYALTY CREDIT FOR ORDERS

Set Loyalty Commission Rules

Generate Loyalty Credit For Orders

Order Status:

All Orders

Start Date:

Apr

9

2014

End Date:

May

9

2014

Find Matching Orders

Select the order status and dates of orders, to locate specific orders

Search for the Orders

Generate Loyalty Credit For Orders

Order Status:

Archived

Start Date:

Apr 9 2014

End Date:

May 9 2014

Find Matching Orders

Once finished click the Find Matching Orders button



View the Orders

Generate Loyalty Credit For Orders

Order Status:

Archived

Start Date:

Apr 9 2014

End Date:

May 9 2014

[Find Matching Orders](#)

Displays all orders within the given parameters

Order ID	Order Time	Billing Name	Status	Order Value	Credit
10139428	2014-04-15 15:15:24	Mrs Barbara Fleming	Archived	\$ 153.00	\$ 7.65
10139702	2014-04-18 09:39:37	Miss Lucille Power	Archived	\$ 79.80	\$ 3.99
10139839	2014-04-21 09:33:57	Mrs Wendy Rymill	Archived	\$ 103.80	\$ 5.19
<input type="checkbox"/> 10140442	2014-04-27 19:05:36	Ms Patricia Wray	Archived	\$ 149.70	-
10140789	2014-04-29 23:48:22	Ms Janina Carter	Archived	\$ 195.60	\$ 9.78
10141081	2014-05-02 13:34:51	Mr Dale Carter	Archived	\$ 99.80	\$ 4.99
10141118	2014-05-02 19:37:16	Mrs SIMONE MATURO	Archived	\$ 149.60	\$ 7.48
<input type="checkbox"/> 10141331	2014-05-05 07:05:19	Mrs Sarah McPhee	Archived	\$ 136.70	-
10141388	2014-05-05 13:12:18	Mr Dale Carter	Archived	\$ 49.90	\$ 2.50
<input type="checkbox"/> Select All					

[Add Credit](#)

Select the Customer that will Receive Loyalty Credit

Generate Loyalty Credit For Orders

Order Status:

Archived

Start Date:

Apr 9 2014

End Date:

May 9 2014

Find Matching Orders

Order ID	Order Time	Billing Name	Status	Order Value	Credit
10139428	2014-04-15 15:15:24	Mrs Barbara Fleming	Archived	\$ 153.00	\$ 7.65
10139702	2014-04-18 09:39:37	Miss Lucille Power	Archived	\$ 79.80	\$ 3.99
10139839	2014-04-21 09:33:57	Mrs Wendy Rymill	Archived	\$ 103.80	\$ 5.19
<input checked="" type="checkbox"/> 10140442	2014-04-27 19:05:36	Ms Patricia Wray	Archived	\$ 149.70	-
10140789	2014-04-29 23:48:22	Ms Janina Carter	Archived	\$ 195.60	\$ 9.78
10141081	2014-05-02 13:34:51	Mr Dale Carter	Archived	\$ 99.80	\$ 4.99
10141118	2014-05-02 19:37:16	Mrs SIMONE MATURO	Archived	\$ 149.60	\$ 7.48
<input type="checkbox"/> 10141331	2014-05-05 07:05:19	Mrs Sarah McPhee	Archived	\$ 136.70	-
10141388	2014-05-05 13:12:18	Mr Dale Carter	Archived	\$ 49.90	\$ 2.50

☐ Select All

Add Credit

Click on the Add Credit button

Select the box of the customer who will receive the credit

Only orders which have not received any credit will be able to receive retrospective credit

Congratulations

- You now know how to set up the loyalty credit program for you customers as they make purchases.

And

- Add loyalty credit retrospectively to customers that will encourage more sales.



Check out Affiliate Credit

- Affiliate credit allows you to reward your customers who generate business for you by recommending your services/products
- Follow the link for more information:
 - <http://gtpsupport.gtp-icommerce.com.au/viewArticle//Affiliate+Marketing+On+Your+Site>



End of Presentation

- GTP iCommerce Support
- Email support@gtp.com.au
- <http://gtpsupport.gtp-icommerce.com.au>
- Ph: 1300 853 533
- www.gtp-icommerce.com
- www.gtphub.com