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1. Introduction

This purpose of this document is to describe how to use Optemizer version 3.0.9 for the changed loyalty interface.

Optemizer 3.0.7 or greater allows for single touch loyalty by providing functionality to perform the following activities within Optemiser – updating Optemiser and the Loyalty Back End Simultaneously:

- Sign Up Customer in POS – registering Customer in Loyalty and adding the customer cash account to Optemiser
- Migrate a customer Account from the Loyalty Backend into Optemiser
- Swap a Card where a store is rebranding from Home to Mitre 10 or the consumer has lost their card
- Amend customer contact details
- Search the customer base at the Loyalty Provider

What this means is that it will no longer be necessary for staff to use the Loyalty Provider web site, all functionality that is required by the store staff has now been built into Optemiser.

2. Summary of Activities

The following Scenarios are described below:

1. Sign Up a New Customer
2. Existing Customer – Customer Has their Card with them
3. Existing Customer – Does not have their Card with them
4. Card Swap - DIY to Mighty Rewards
5. Replace a Lost Card
6. Search for a Customer Not in Optimiser

2.1 Sign up a New Customer

Scenario

Customer does not have a loyalty card

Outcome

At the end of the process the customer will

- be registered at the Loyalty Provider
- Have a Cash Account in Optimizer
- Accrue points of this sale
- Can redeem points on their next sale

Steps to Perform

1. Select a New Card
2. Scan the Card into the Code Field in POS
3. Select “Yes” to Sign up the Customer
4. Scan the Card into the Card Number Field in the Form
5. Complete the details in the form
6. Click Submit
7. Process the Sale Normally

2.2 Existing Customer, Has their Card with Them

Scenario

Customer already has a loyalty card but they don't have an account in Optimiser

Outcome

At the end of the process the customer will

- Be registered at the Loyalty Provider
- Have a Cash Account in Optimizer
- Accrue points of this sale
- Can redeem points on this sale and all future sales

Steps to Perform

1. Scan the customers card into the Code field in POS
2. Select “Yes” to Sign Up the Customer from the pop up
3. Scan the Customers Card into the Card Number field in the sign up window
4. The Customers' existing information will be displayed in the Window
5. Confirm the eMail Address and / or Mobile Number, updating them if necessary
6. Submit the form
7. Proceed with the sale normally

2.3 Existing Customer, Does Not Have Their Card with Them

The customer already has a card, but they don't have it on them.

Scenario

Customer has a loyalty card but they didn't bring it with them today. In the past, unless you searched in the Loyalty Provider Web Site to find the customers card number, they would not earn points on this sale.

Outcome:

At the end of the process the customer will

- Be registered at the Loyalty Provider
- Have a Cash Account in Optemizer
- Accrue points of this sale
- Can redeem points on this sale and all future sales

Steps to Perform

1. Type the customer name into the code field or click on the magnifying glass to the right of the code field to activate the customer search window
2. Change the search type to "Name Contains"
3. Type some of the customer name in the search for field
4. Review the results of the search to find the customer account
5. If you find the customer in the list, process the sale normally
6. If you can't find the customer in the list,
 - a. From the top Menu bar select → Sales → IHG Loyalty → Maintain / Search Customers
 - b. Type the customer surname into the white space in the Surname column and press [Enter]
 - c. Identify the customer and write the down their card number
 - d. Close the window
 - e. Follow the steps in section 2.2 Above but where the step is to scan the card, type in the card number using the keyboard

2.4 Card Swap - DIY Rewards to Mighty Rewards

Customer has a DIY card and you want to swap it to a Mighty Rewards Card

Outcome

At the end of the process the customer will

- Have their old loyalty card disabled – It can NEVER be used again
- Be registered at the Loyalty Provider under their new card number
- Have a Cash Account in Optemizer
- Accrue points of this sale
- Can redeem points on this sale and all future sales

Steps to Perform

1. From the top Menu bar select → Sales → IHG Loyalty → Replace Card
2. Scan the DIY Card number into the first card number field
3. Scan their new Mighty Rewards Card into the second Field
4. Follow the steps in section 2.2 to copy the customer from the Loyalty Provider into Optemiser, taking the time to confirm their eMail address and Mobile Number
5. Process the sale normally

2.4 Card Swap – Lost Card

Customer has either a DIY card or a Mighty Rewards Card, but they have lost it

Outcome

At the end of the process the customer will

- Their old loyalty card will be disabled – It can NEVER be used again
- Have a new loyalty card
- Be registered at the Loyalty Provider under their new card number
- Have a Cash Account in Optimizer
- Accrue points of this sale
- Can redeem points on this sale and all future sales

Steps to Perform

1. From the top Menu bar select → Sales → IHG Loyalty → Maintain / Search Customers
2. Type the customer surname into the white space in the Surname column and press [Enter]
3. Identify the customer and write the down their card number
4. Close the window
5. From the top Menu bar select → Sales → IHG Loyalty → Replace Card
6. Type the old card number the first card number field
7. Scan their new Card into the second Field
8. Process the sale normally

2.4 Search for the Customer in the Loyalty Provider

Scenario

You want to confirm the customer details as they are on the Loyalty provider site. The customer may or may not be with you.

Steps to Perform

1. From the top Menu bar select → Sales → IHG Loyalty → Maintain / Search Customers
2. Type the customer surname into the white space in the Surname column and press [Enter]
3. Identify the customer and review the details, if you want to change them, click on the EDIT button at the bottom of the window.
4. Updating the details in this window will update the Loyalty Web Site and Optimiser from the single point of entry