



SOP Direction Document

1st Issue

Windows User

[Type the company name]

[Pick the date]

Customer Connect Loyalty S.O.P

Contents

Recruitment	4
Awarding Points	8
How are these Transactions Monitored and Accounted	9
Further Security Re Cashing Up	11
Redeeming Points/Rewards.....	12
Offers Redeemed	16
Offer Redemption	18
Reception End of Shift Cash Up	20
Activity Summary Across Hotels	20

Introduction

This document is intended to give direction on how transactions are run both in the hotel and then verified and audited in the accounting function.

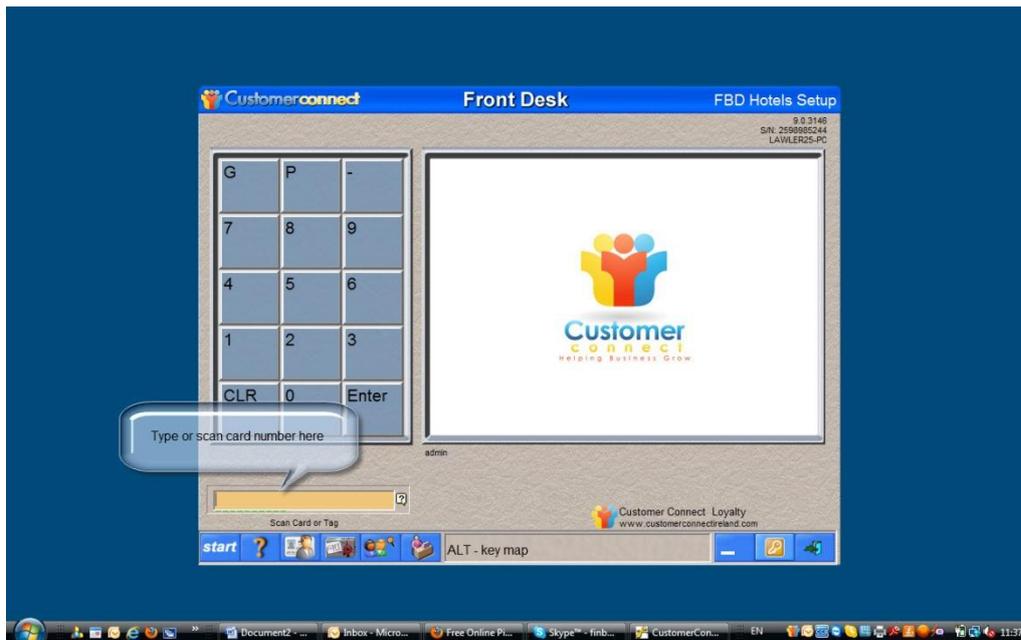
It is by no means a complete document and further feedback and direction from Financial Control and or Operations is required.

Member Recruitment

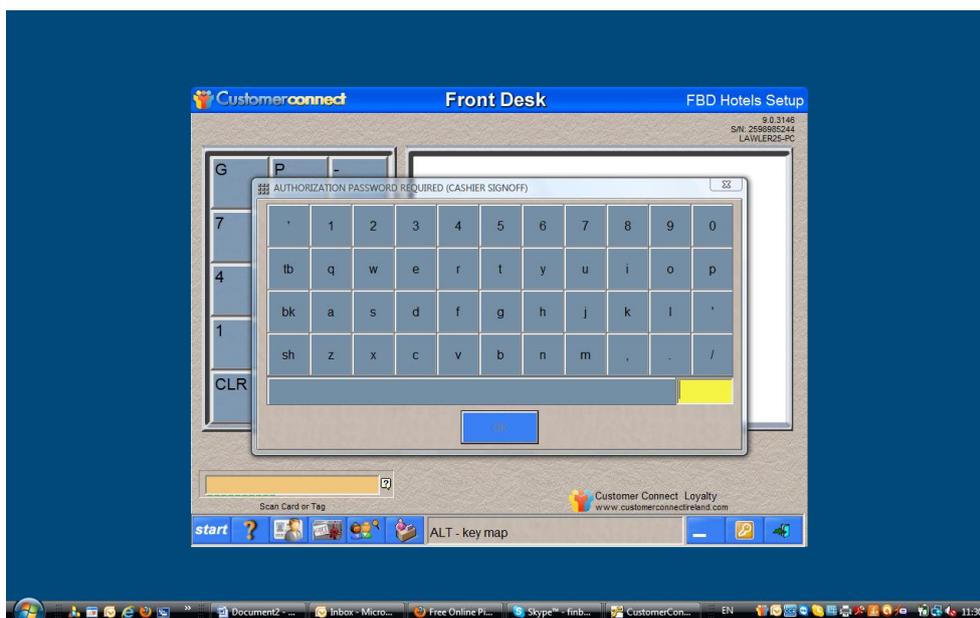
Recruitment can be setup in several ways.

- In hotel card scan and issue
- Web-based enrolment
- Kiosk based enrolment

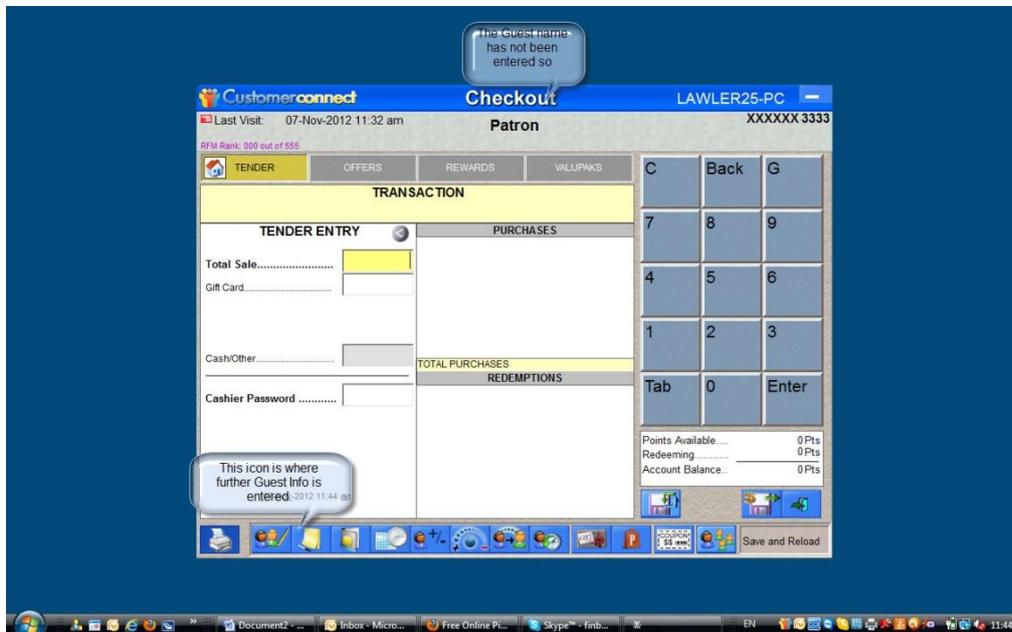
The vast bulk of members are normally recruited in the hotel . When a guest is being enrolled the card number is entered into the Front Desk screen area



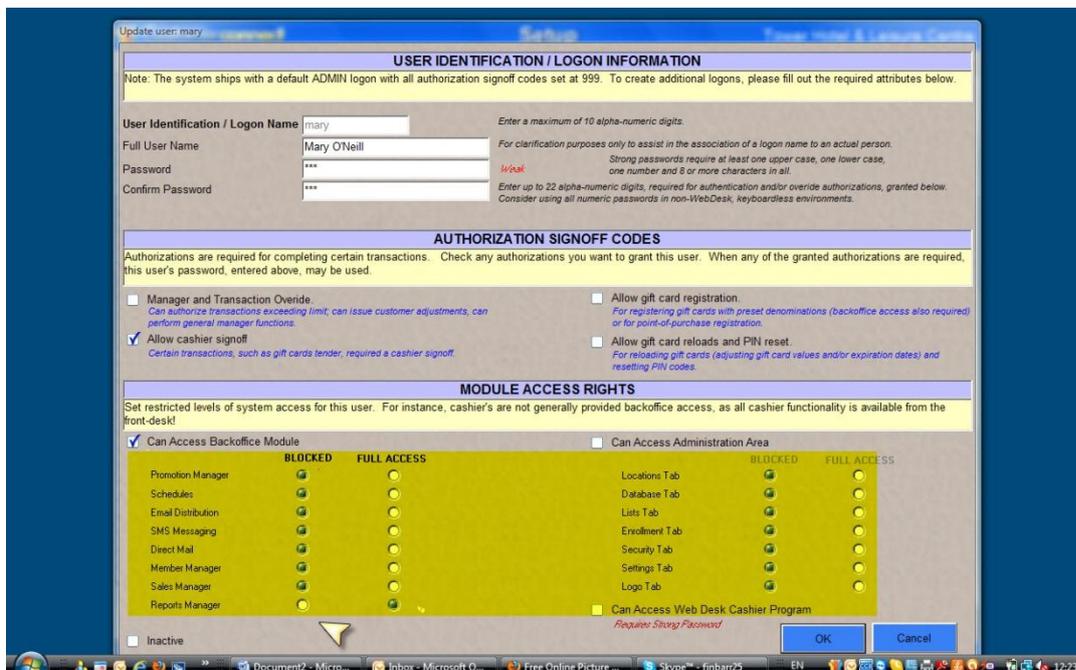
Once the card is entered the screen will prompt for the authorisation password. This means that we can track team members to see who has opened accounts and also should a query arise we can see who opened the account.



After the Authorisation password is entered the Check our screen will appear (below) where points can be awarded.

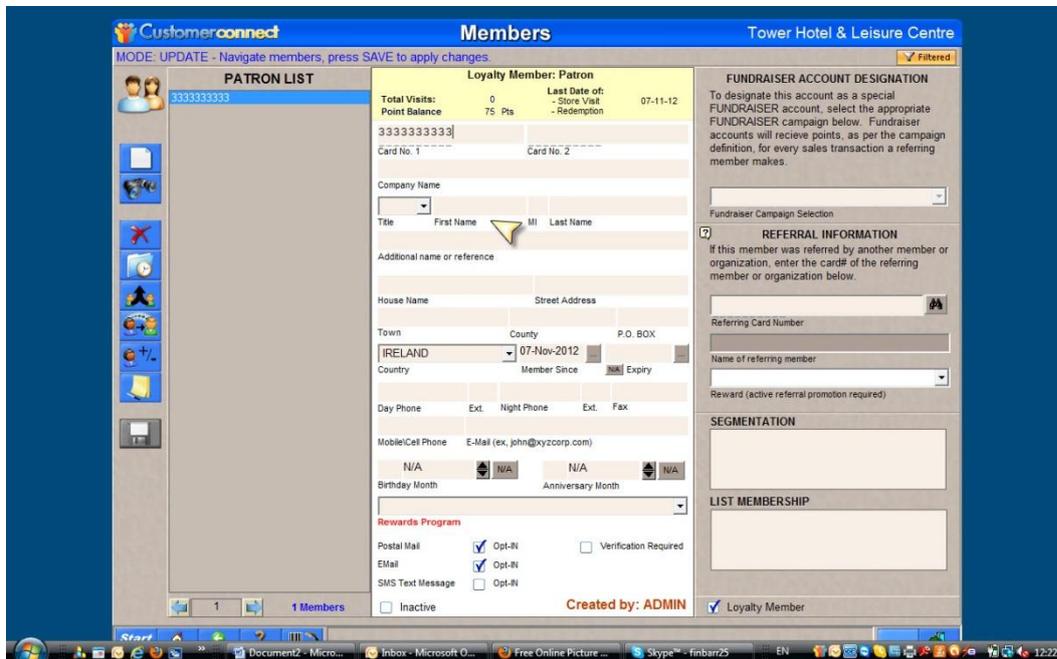


Guest details can be added if desired. Alternatively this can be added in a back office scenario at a later time using details from the signed registration form. This back office can be restricted access (see below) We can restrict access to any area on the system.



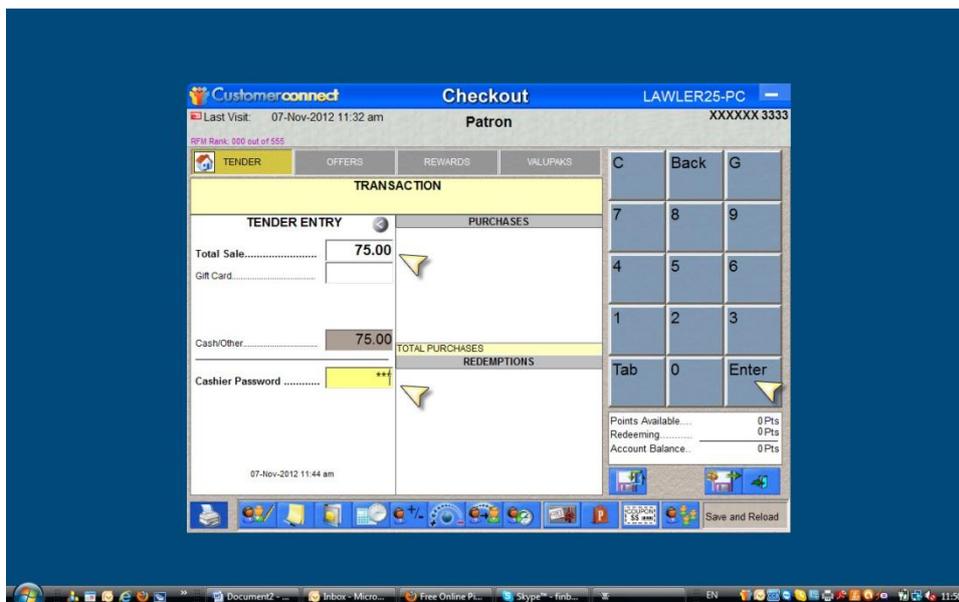
Above we can see that Mary O'Neill is allowed to add points and access the Reports area only

Below we can see the back office area where members details are recorded. This area can be closed off to all but nominated staff to allow for guest registration.



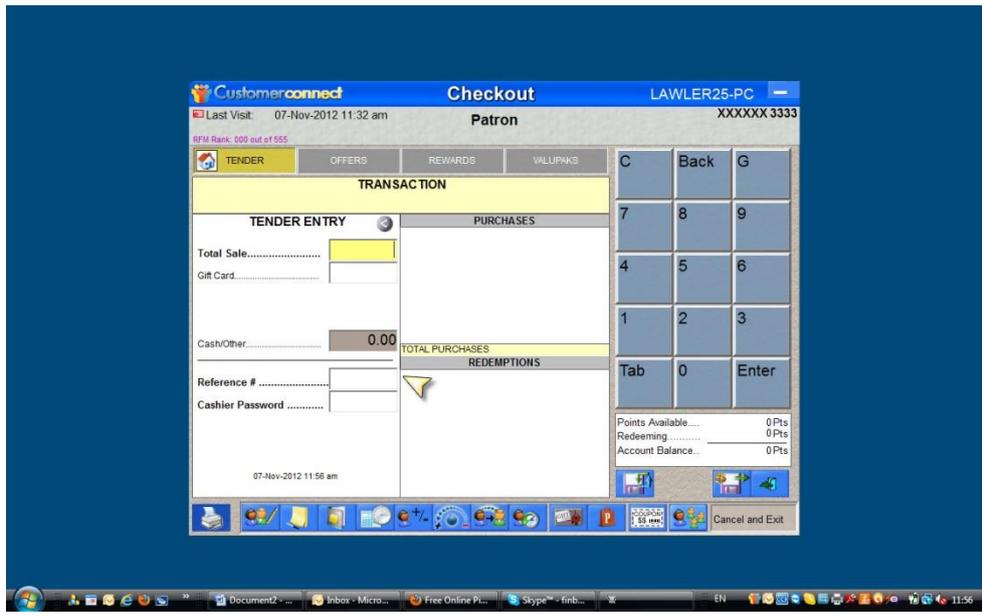
Awarding Points

Points are awarded in the Checkout Screen, The staff member awards points by entering the sale amount and the loyalty platform calculates the points to be awarded.



In the above image a Cashier Password must be entered. We can also see where the sale amount is tendered and the enter button is pressed when the transaction is completed.

Below we can see that we have added in a reference number as well. This could be the last 4 digits of the invoice number and this links the allocation of points to a transaction...



How are these Transactions Monitored and Accounted

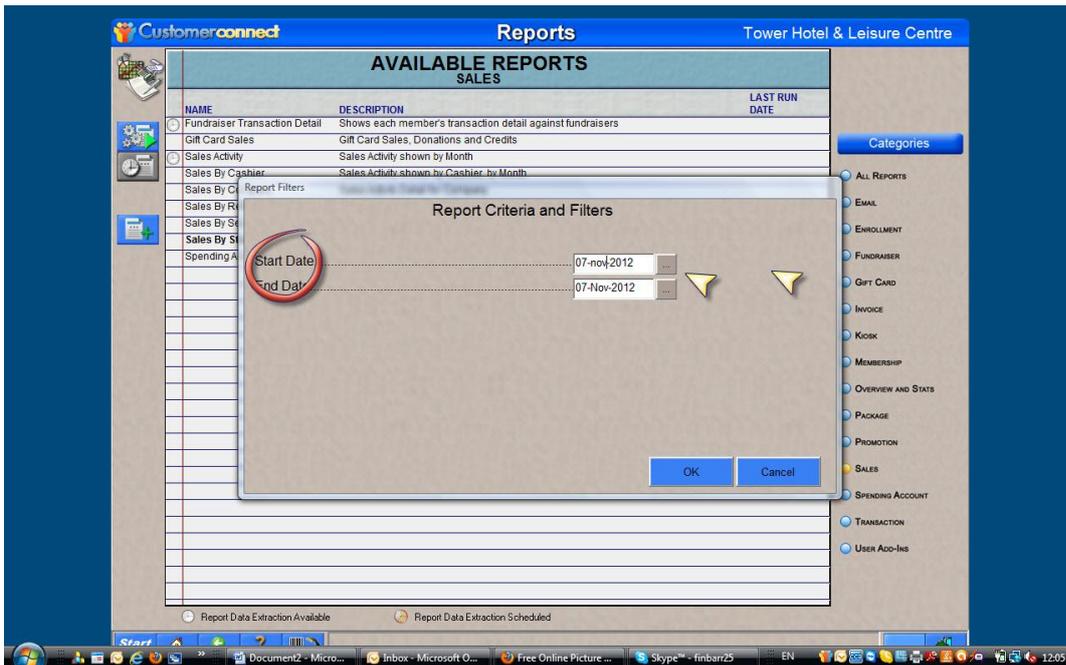
1, At the end of shift the cashier/receptionist can go to the reports section of the system as shown below. If the receptionist clicks on the Sales category on the right hand side of the page (see arrow)



Below we can see the available reports under the category of Sales. The arrow highlights the recommended report titled Sales by Station and Cashier.



Below we can see the date parameters need to be set. In this case the date of the shift is entered. This is a real time report so the report start and finish dates would normally be the same.



Below we can see the actual report...

FBD Rewards
Tower Hotel & Leisure Centre
The Mall, Waterford, Waterford 05 1882300

Sales Activity (by Station, by Cashier)
Report Date: 07/11/12
Report Period: 11/7/12

DATE	TYPE	TRAN NO.	REFERENCE NO.	GROSS SALE	NET SALE	POINTS EARNED	CARD NUMBER	TRANSACTION DETAILS
STATION: LAWLER25-PC								
CASHIER: MARY								
11/07/12 01 A		0001037476	78955	€65.00	€65.00	05	5555555555	Cashier: MARY;
11/07/12 00 P		0001037470	345789	€75.00	€75.00	76	3333333333	Cashier: MARY;
November - 2012				€140.00	€140.00			
MARY				€140.00	€140.00			
LAWLER25-PC				€140.00	€140.00			
Tower Hotel & Leisure Centre				€140.00	€140.00			

1. The report is exported in all formats required here
2. Cashier name is Mary
3. This is the reference number used by Mary. Example the invoice number.
4. This is the computer that each transaction was processed on.
5. This is the guest card number involved in the transactions.
6. The report dates.

Further Security Re Cashing Up

If a thermal receipt printer is installed at each hotel Reception area then a receipt can be issued for each loyalty transaction (see below) These can be attached to the Cashiers cashup submission at the end of a shift.

BUTCHERS BLOCK-BLACKPOOL

VIP Rewards
021 4932576

Patron: Finbarr Malone
XXXXXX2328



TOTAL: €150.00

Member credited with 300 pts this transaction.
Total Loyalty Account Balance is 694 points.

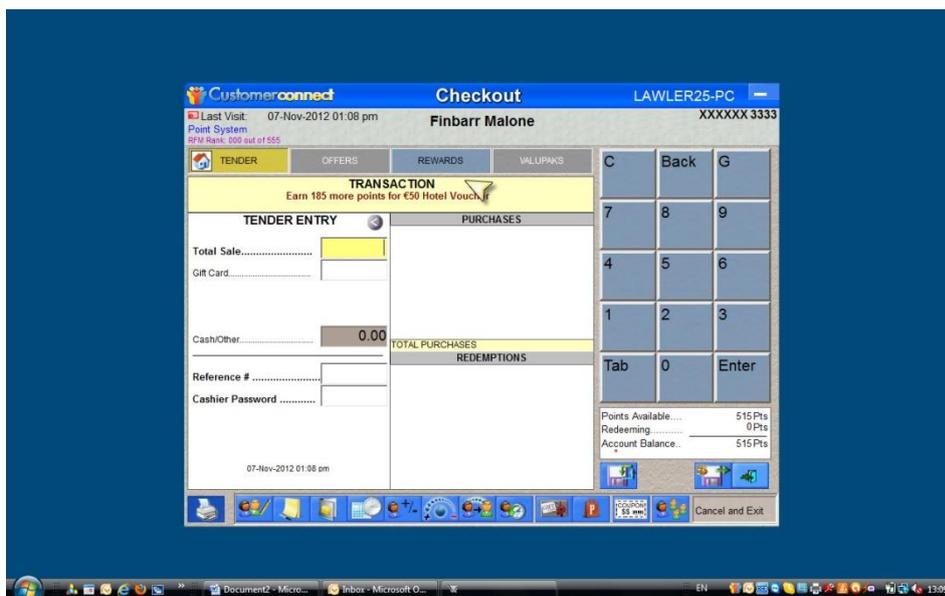


Transaction 0000989097 24-Oct-2012 12:18 pm
** STORE COPY **

Redeeming Points/Rewards

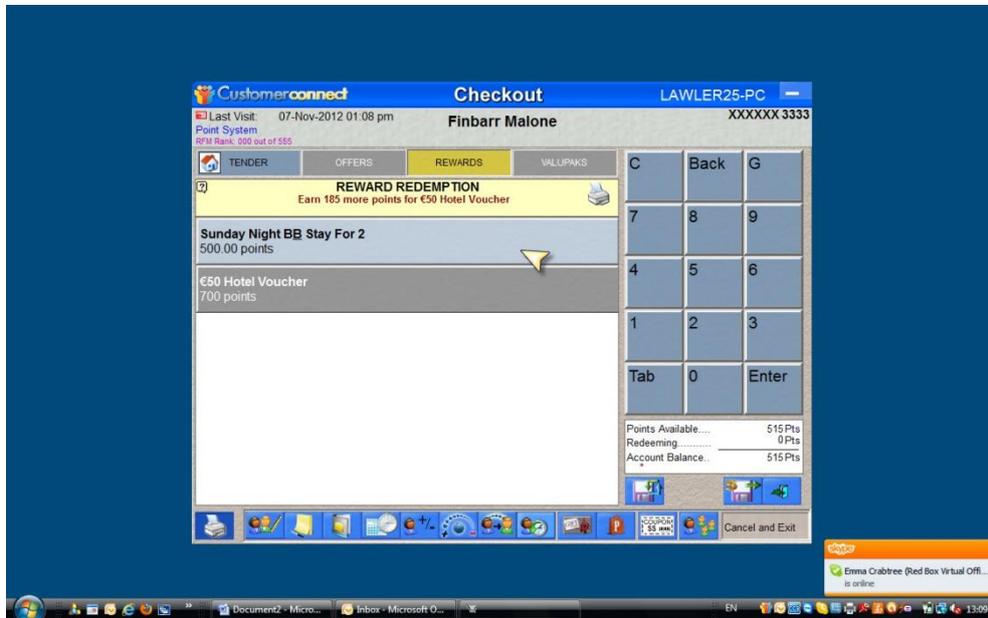
Rewards can be redeemed I.E. issued to Customers from Head Office or alternatively they can be issued by the team at reception in each hotel.

To redeem rewards the staff member needs to go to the Checkout screen of that customer

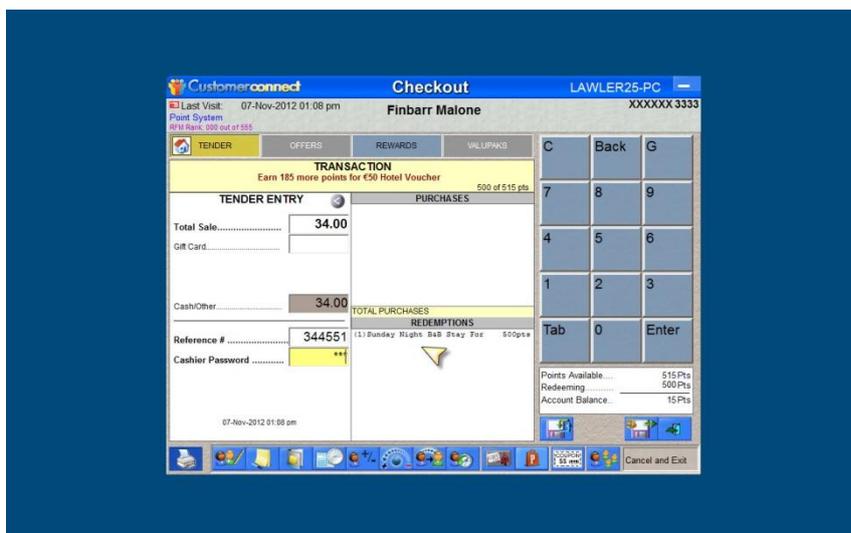


See above the Rewards button is in Blue which highlights that the Guest qualifies for rewards. This Blue rewards button should be clicked by the issuing staff member.

Below it can be seen that the Guest (Finbarr Malone) qualifies for one reward for 500 points.



This reward can be Clicked out and then the staff member completes the transaction as through the Checkout screen below. We can see on the screen under the heading Redemptions the reward is listed here and beside that the staff member must enter the reference number and cashier password again to complete the security trail.



Below we can see a receipt which must be signed by the customer to verify the Reward issue.

BUTCHERS BLOCK-BLACKPOOL
VIP Rewards
021 4932576

Patron: Finbarr Malone
XXXXXX2328



TOTAL: €12.00

Member credited with 24 pts this transaction.
Total Loyalty Account Balance is 242 points.

REDEEMED POINT REWARDS	TOTAL
€5 Euro Voucher	
1@500pts	500

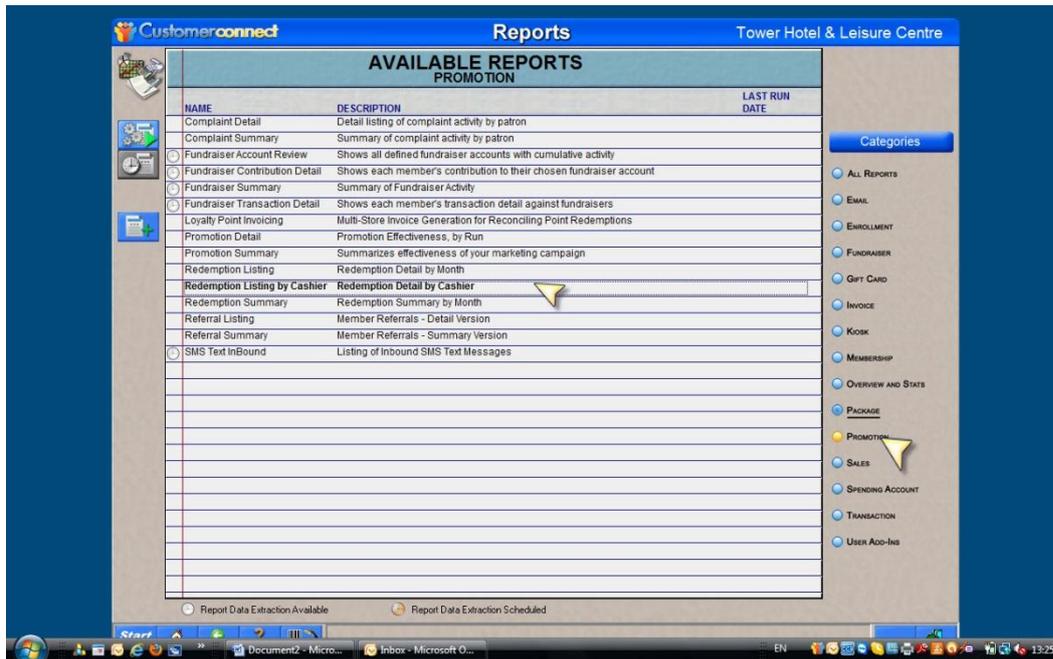
Signature



Transaction 0000989108 24-Oct-2012 12:21 pm
** STORE COPY **

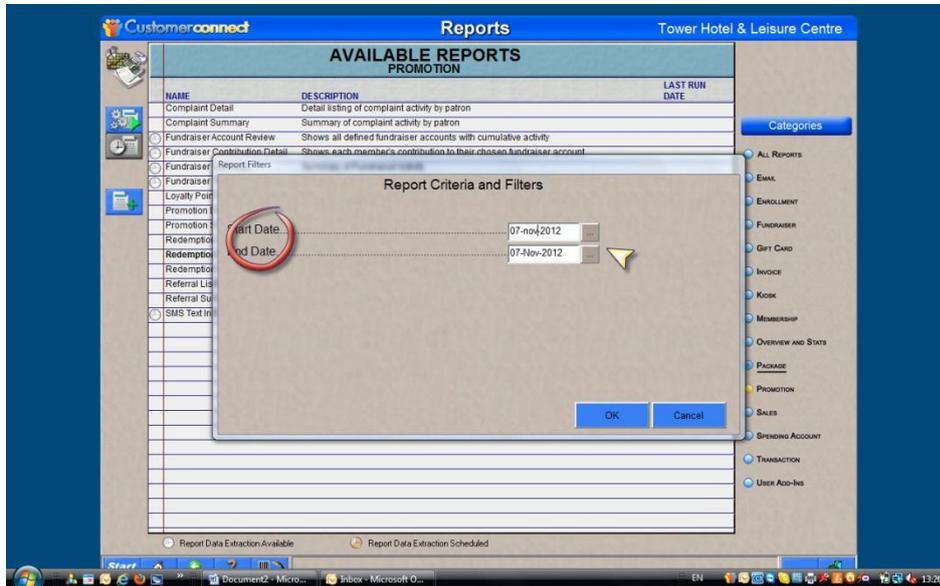
This receipt should be kept as evidence just as a credit card slip would be kept.

A further security step is to require the cashier to print at the end of the shift a Redemption Detail Report.



See above the redemption Detail Report Link

Don't Forget to set the date parameters



FBD Rewards
Tower Hotel & Leisure Centre
The Mall, Waterford, Waterford . 05 1962300

Redemptions By Cas
Report Date: 07/1
Report Period: 11/7 1

DATE /TIME	MEMBER	TRAN NO.	QTY	ITEM REDEEMED	POINTS REDEEMED
CASHIER: MARY 07/11/2013 13:27:00	3333333333	1037860	1	Sunday Night B&B Stay For 2	500.00
November - 2012					500
CASHIER TOTALS					500
STORE TOTALS					500
GRAND TOTALS					500

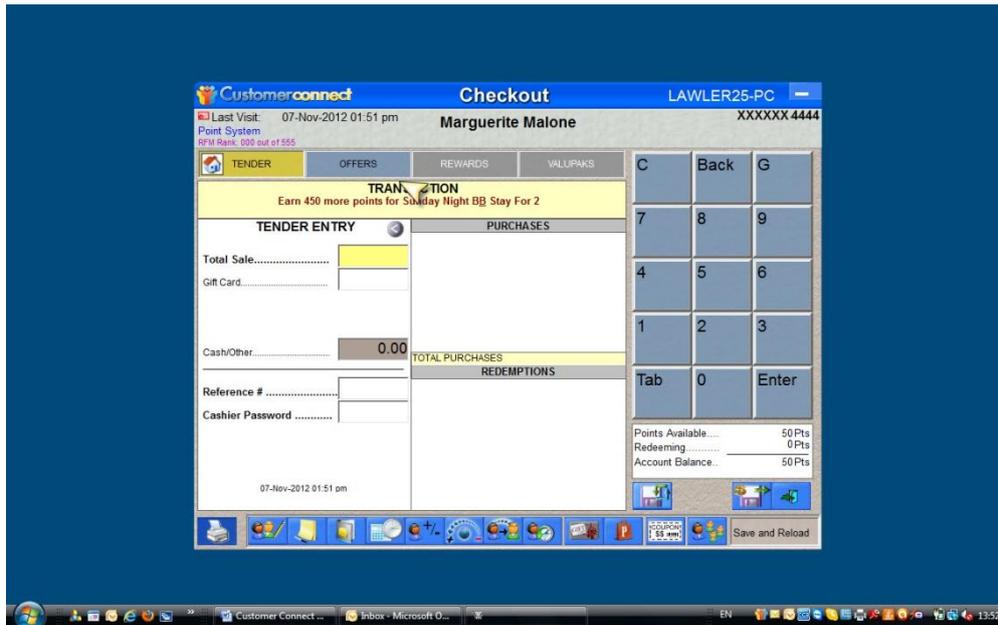
This Report could be submitted with the cashiers end of shift report.

1. Export Feature to export to pdf or other formats
2. Cashier Name
3. Member Card number
4. Reward Issued
5. Hotel Name
6. Points Redeemed
7. Report Dates

Offers Redeemed

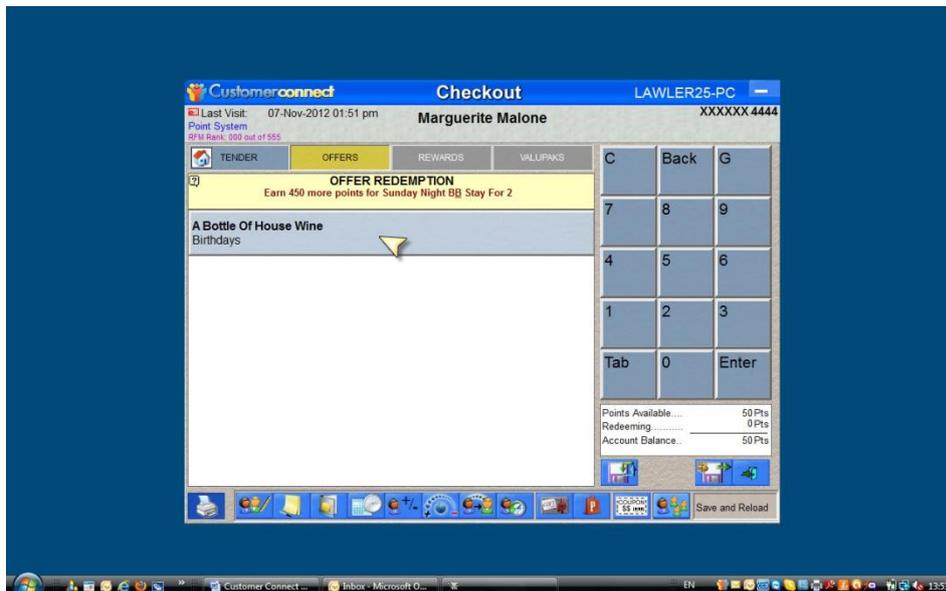
Offers are redeemed in almost the same fashion as rewards and even show on the same reports. The difference is that points are not required for Offers. Offers are based on guest spend or visit patterns or birthdays and anniversaries.

Go to the Checkout screen

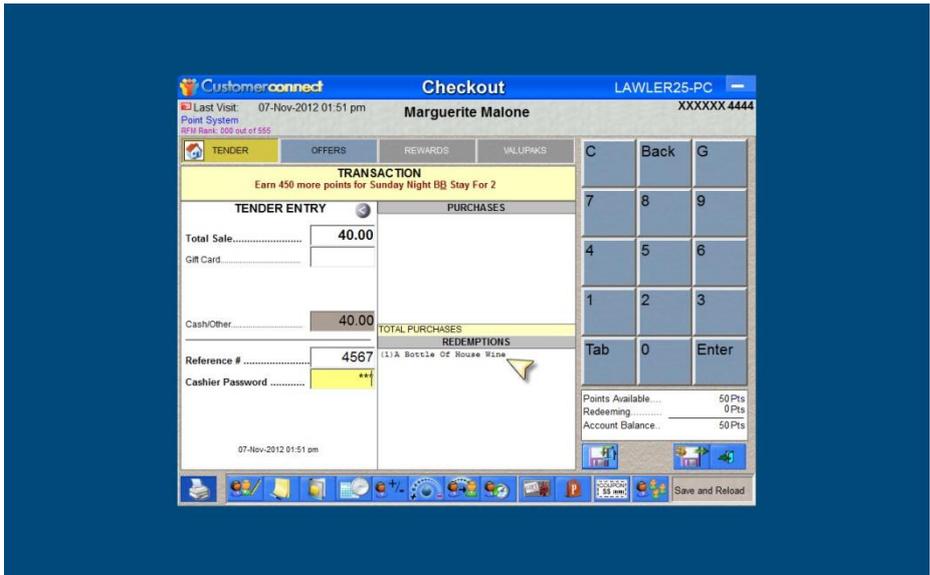


Above you can see the Offers button is highlighted so this means that this guest qualifies for an offer.

Below we can see this Guest is entitled to a Bottle of House Wine.



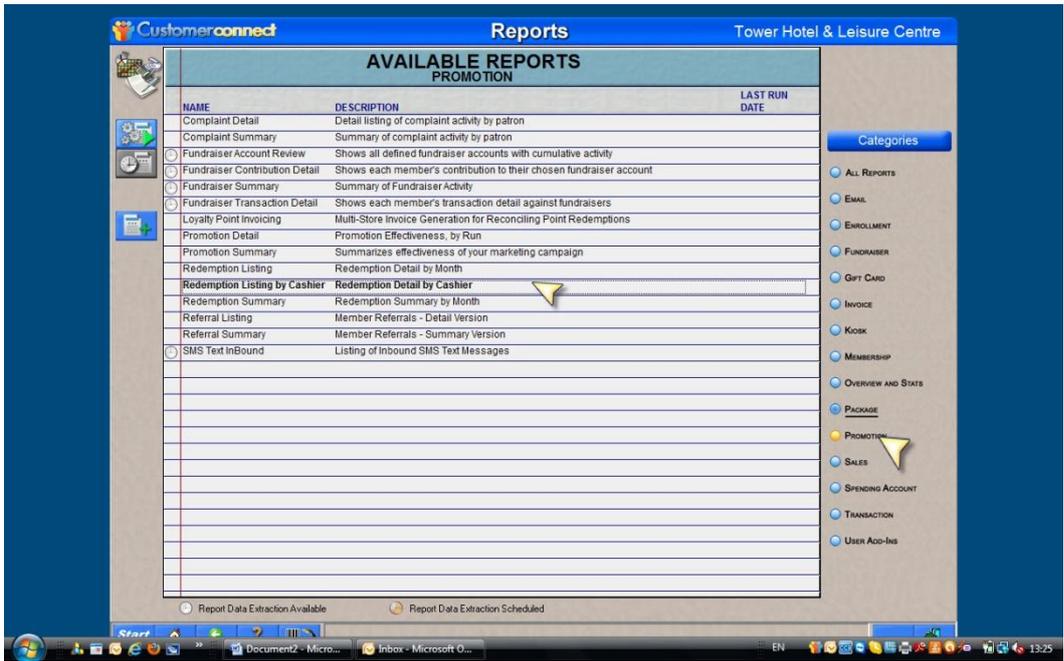
The wine is 'clicked' out and the screen returns to the Tenders Screen



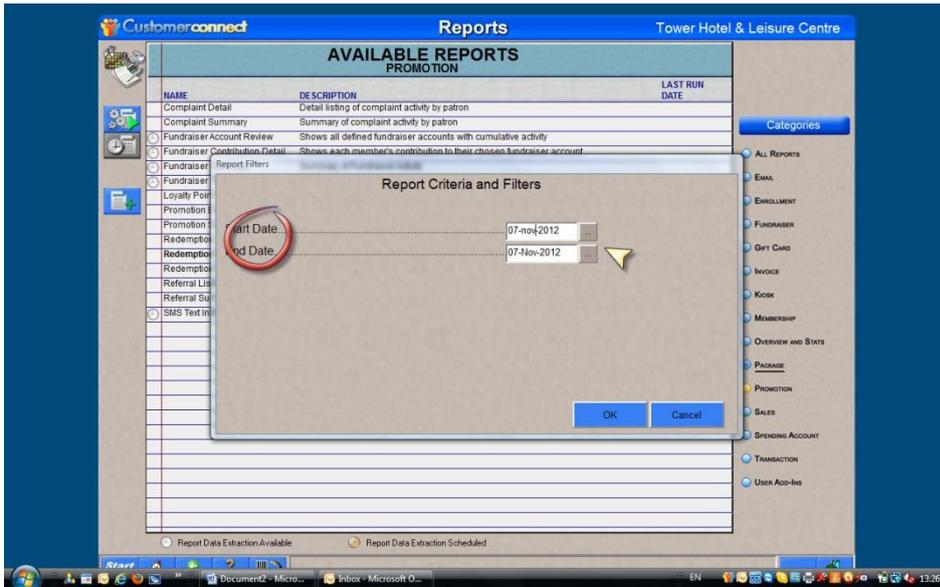
Above we can see under Redemptions the bottle of wine is listed and the cashier completes the transaction as normal entering reference number and cashier password.

Offer Redemption

As with rewards Redemption, Offers are listed in the same report which the cashier can print at the end of shift. And the Customer again signs the receipt when an offer is Redeemed.

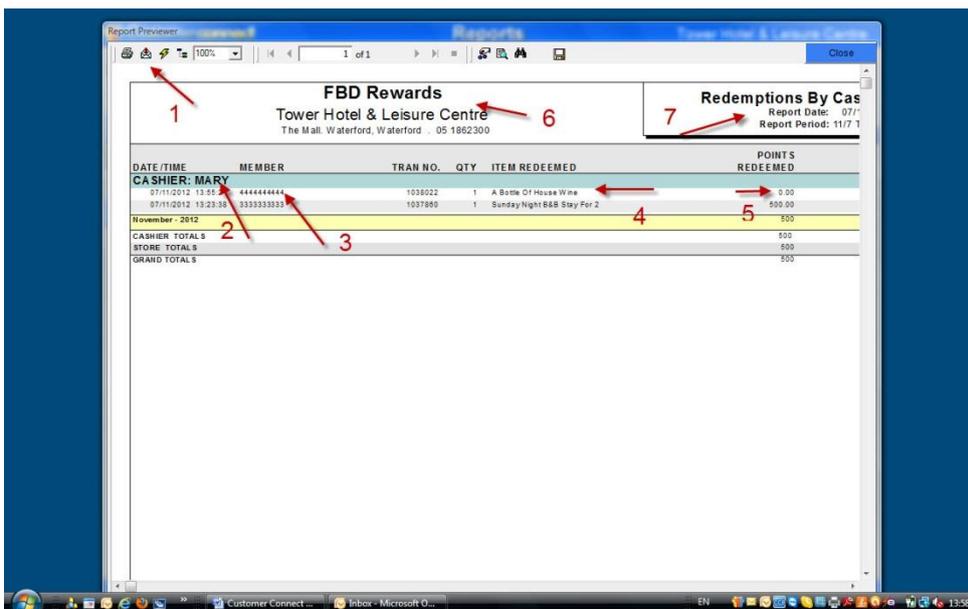


See above the Redemption Detail by Cashier



Don't forget to set the date parameters.

Below is the redemption detail report...



This Report could be submitted with the cashier's end of shift report.

1. Export Feature to export to pdfs or other formats
2. Cashier Name
3. Member Card number
4. Offer Issued
5. Points redeemed (in this case the points are at '0' because its an Offer)
6. Hotel Name
7. Report Dates

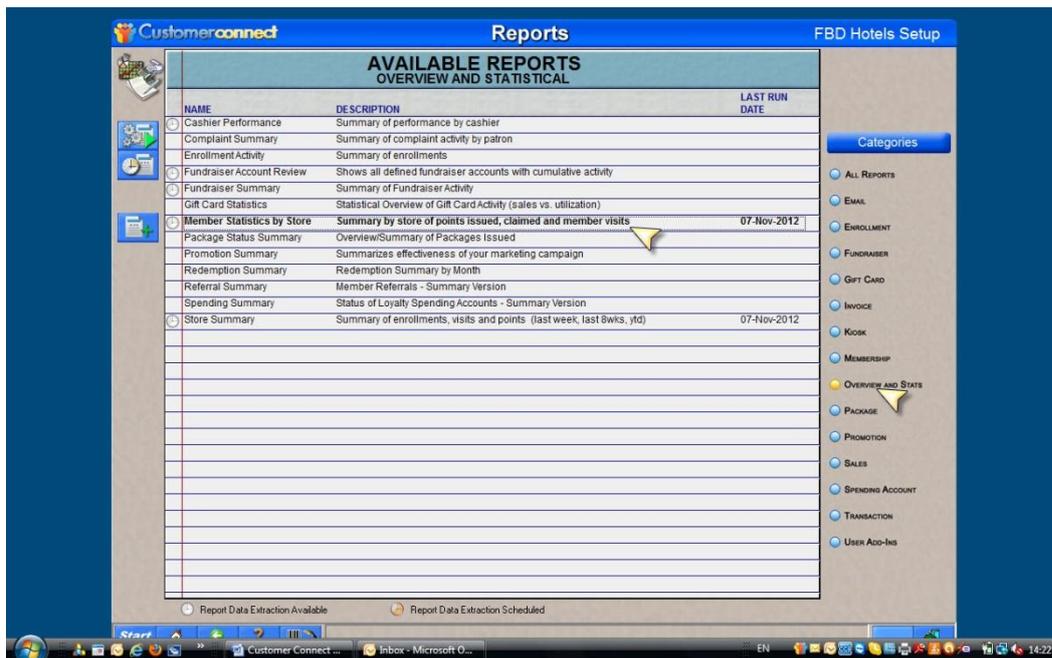
Reception End of Shift Cash Up

In Summary the cashier submits two reports at the end of shift

1. Sales by Station and Cashier
2. Redemption Detail By Cashier
3. The Rewards and Offers Receipts Signed by Customer (99% of transactions are points issued so these receipts will not be common)

Activity Summary Across Hotels

Anytime a report can be run that will give a summary report of activity across the hotels.



The screenshot displays the 'Customerconnect Reports' interface. The main window is titled 'AVAILABLE REPORTS OVERVIEW AND STATISTICAL'. It features a table with columns for 'NAME', 'DESCRIPTION', and 'LAST RUN DATE'. A mouse cursor is pointing to the 'Member Statistics by Store' report, which has a last run date of '07-Nov-2012'. To the right of the table is a 'Categories' sidebar with radio buttons for various report types, including 'All Reports', 'EMAIL', 'ENROLLMENT', 'FUNDRAISER', 'GIFT CARD', 'INVOICE', 'KIOSK', 'MEMBERSHIP', 'OVERVIEW AND STATS', 'PACKAGE', 'PROMOTION', 'SALES', 'SPENDING ACCOUNT', 'TRANSACTION', and 'USER ADD-INS'. The 'OVERVIEW AND STATS' category is selected. At the bottom of the window, there are status indicators for 'Report Data Extraction Available' and 'Report Data Extraction Scheduled'. The Windows taskbar at the bottom shows the Start button, taskbar icons for 'Customer Connect' and 'Inbox - Microsoft O...', and the system tray with the date '14:22'.

NAME	DESCRIPTION	LAST RUN DATE
<input type="checkbox"/> Cashier Performance	Summary of performance by cashier	
<input type="checkbox"/> Complaint Summary	Summary of complaint activity by patron	
<input type="checkbox"/> Enrollment Activity	Summary of enrollments	
<input type="checkbox"/> Fundraiser Account Review	Shows all defined fundraiser accounts with cumulative activity	
<input type="checkbox"/> Fundraiser Summary	Summary of Fundraiser Activity	
<input type="checkbox"/> Gift Card Statistics	Statistical Overview of Gift Card Activity (sales vs. utilization)	
<input type="checkbox"/> Member Statistics by Store	Summary by store of points issued, claimed and member visits	07-Nov-2012
<input type="checkbox"/> Package Status Summary	Overview/Summary of Packages Issued	
<input type="checkbox"/> Promotion Summary	Summarizes effectiveness of your marketing campaign	
<input type="checkbox"/> Redemption Summary	Redemption Summary by Month	
<input type="checkbox"/> Referral Summary	Member Referrals - Summary Version	
<input type="checkbox"/> Spending Summary	Status of Loyalty Spending Accounts - Summary Version	
<input type="checkbox"/> Store Summary	Summary of enrollments, visits and points (last week, last 8wks, ytd)	07-Nov-2012

Below we can see the hotels listed and the activity in each...

The screenshot shows a 'Report Preview' window with a 'MASTER REPORT' and a 'Membership Statistics Report'. The 'Membership Statistics Report' covers the period from 2012-10-8 to 2012-11-7, with 31 days in the period. The table below shows the activity for various hotels.

LOCATION NAME	POINTS EARNED	MEMBER VISITS	NEW ENROLLMENTS	AVG ENROLL PER DAY	POINTS CLAIMED	TOTAL ACTIVE MEMBERS
Castlemoak Hotel & Country Club	0	0	0	0	0	0
Fairlegg House Hotel & Golf Club	0	0	0	0	0	0
F&D Hotels Setup	23.00	1	3	0	0	3
Temple Bar Hotel	0	0	0	0	0	0
Tower Hotel & Leisure Centre	349.00	9	2	0	500.00	2
	372.00	10	5	0	500.00	5.00

Red arrows labeled '1' and '2' point to the 'POINTS EARNED' and 'POINTS CLAIMED' columns for the 'Tower Hotel & Leisure Centre' row, respectively.

Above is a Summary Activity Report

The hotels are listed on the left

1. This is the net points issued for the period. Ie Points issued less points redeemed.
2. This is the points redeemed total.

At any time therefore you can see the points liability of each hotel...