

CardSprint > Loyalty



CardSprint is proud to introduce the latest version of our loyalty software. Designed from the ground up, CardSprint Loyalty has been developed from years of experience dealing with businesses who know the value of good customer relations, but have been unable to find an affordable solution.

Packed with useful features, CardSprint Loyalty makes it easy to manage your clientele. Encourage repeat business by initiating a points rewards program, and set up any number of timely promotions. CardSprint Loyalty enables you to create a history of your customer's purchases, and selectively market only to those you need to, saving time and money on saturated marketing.

CardSprint Loyalty can be downloaded from www.cardsprint.com.au/software.html. This is a trial version, which is only capable of processing 100 transactions. If you would like to purchase CardSprint Loyalty, contact us on (08) 8365 2875. Monthly or yearly options are available.

It is important to note that this is a stand alone program and will not exchange information with your point of sale software, unless an integrated interface is developed specifically for your system. This means that any transaction will need to be entered separately into CardSprint loyalty. We have recently developed such an interface to support Uniwell registers, and we would be happy to look at your particular point of sale system to determine interface viability.

Installation

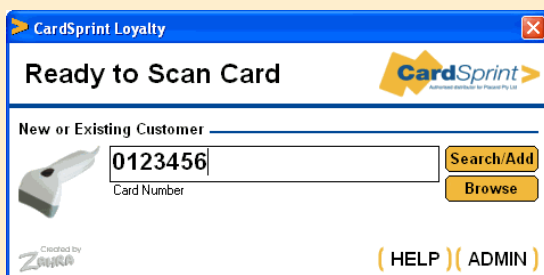
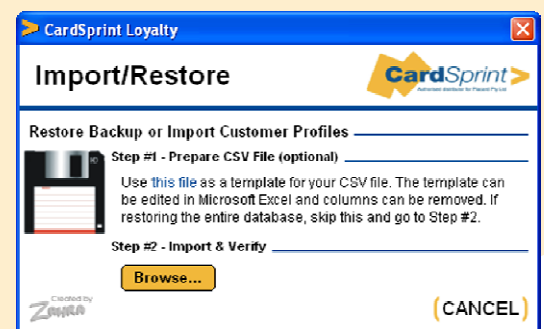
Once the ZIP folder has been saved to your computer, extract the files and run the *CardSprint loyalty.msi* file to install the program. If no access key number is entered, the software remains a trial version, restricted to 100 transactions.

Test Data

In the downloaded ZIP folder is some test data, including fake customers, promotions and transactions. This provides an opportunity to play around with the functions and become familiar with the processes before adding your own customers. To install the test data, go to the admin section and import the *Loyalty (dummy)* Access file. Click on the Import/Restore button, and then *Browse* for the file. Be sure to choose file type as Microsoft Database(MDB), then find the "loyalty (dummy).mdb" file from the location where you extracted it.

Using as existing database

Accessible via the Admin section, the Import/Restore functions allows you to import an existing database into CardSprint Loyalty. A template is provided to ensure the fields are set up correctly, and we can always assist you in formatting your data correctly should you need help with this.



Scanning a card

Customer numbers can be scanned with a barcode reader or manually entered. To save processing time, once the required length of characters has been entered the transaction screen automatically appears. If you have issued a new card to a customer, simply enter the number, and a blank profile screen will appear. If you want to search for a customer without entering their card number, simply hit the *Browse* button and all card holders will be displayed in surname order.

Transactions

Once a card is scanned, the transaction screen is opened, where you can enter the sale amount. Clicking *Update* will add that transaction to the database. The *History* button will show a list of this customer's purchases.

Points

Each transaction carries a value of points, which is initially set to one point / dollar. This ratio can be changed in the admin section, or by applying a rewards scheme. *Redeem Points* is used if a customer is receiving a reward for reaching a points target, as set up in the rewards/promotions section.

Customer Profile

Build a valuable database. Include your client's address details to enable easy merging to mail out letters, with the option to include specific customers in marketing communications. A "Customer Notes" section allows more specific information to be recorded, giving a personal touch. How does your customer like their coffee? What products do they purchase most often? Which subjects to avoid when chatting? Anything you like may be added. To change or add customer details, simply type them in the respective field and press OK.

The screenshot shows the 'Jay' customer profile form in the CardSprint Loyalty application. It includes fields for 'Enter Transaction/Redeem Points' (Transaction: 45.95, Redeem Points: empty), 'Customer Profile' (Customer Notes: Port Power Supporter), and 'Details' (Preferred Name: Jay, First Name: John, Last Name: Fenwick, Date of Birth: 11 March 1970, Day Time Phone: (08) 2938 1923, Street: 11 Hendie Street, Suburb/City: Tea Tree Gully, State: South Australia, Postcode: 6432, E-Mail: mario@hotmail.com). There is a checkbox for 'Do not direct market to this customer' and a 'Lost/Damaged Card' section with a 'Transfer all details to new card number' field containing '00001'. Buttons for 'History', 'Update', 'OK', and 'CANCEL' are visible.

Lost or Damaged Card

If you need to issue a new card to an existing customer, simply enter the replacement card number here, and all the details will be transferred. Old cards will become void.

The screenshot shows the 'Loyalty Alerts' section in the CardSprint Loyalty application. It displays 'Triggered Alerts for the Selected Customer' with two alerts: 'Collect 500 points' (Collect 500 points) and '\$2000 within the last 2 days' (Spend at least \$2000 in a period of 2 days). A 'REDEEM REWARDS' button is at the bottom.

Loyalty Alert Pop-ups

If a customer reached a points target as set in the rewards section, a Loyalty Alert will popup to prompt a reward to be redeemed. This alert will only pop-up once, and the points amount redeemed will need to be typed into the Redeem Points section.

Administration

Accessible via the *Admin* button on the opening screen, this section allows you to set base parameters, and provides links to the Rewards and Reports functions.

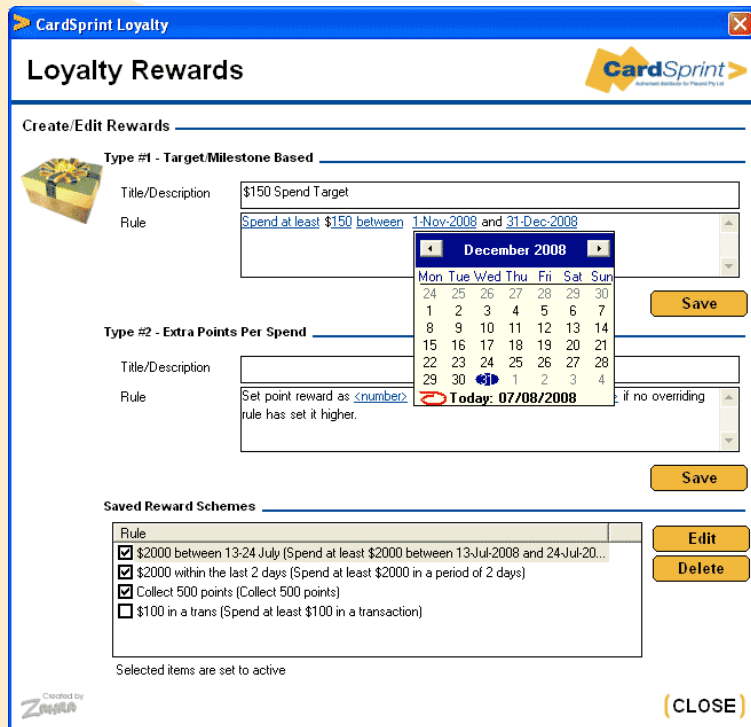
Automatic card search is a handy feature, where the card number length (e.g. 5 digits) can be entered. When a card is scanned, the system automatically forwards you on to the next screen, without needing to press the *Search/Add* button.

The default *Points/\$Reward* value is recommended to be kept at 1 for convenience. Promotions can be set to override this value for a given time.

Points expiry can be set to any number of months.

Backup allows you to save your complete database, to assist in the event of a computer problem, or if you need to re-install the program.

The screenshot shows the 'Administration' settings screen in the CardSprint Loyalty application. It includes sections for 'Settings & Extras' (Automatic Card Search, Card Number Length: 0, Default Points/\$: 1, Points Expire: Apply Expiry checked, Only use points from the previous 12 months), 'Set Admin Password' (New Password, Confirm Password, Password Hint), 'Loyalty Rewards' (Create/Edit Rewards button), 'Import & Export Data' (Export Customer Reports, Backup Everything, Import/Restore buttons), and 'Order Cards' (Order cards from CardSprint). There is also a 'Send Feedback' section with a link for 'Feature requests and other feedback'. Buttons for 'OK' and 'CANCEL' are at the bottom.



Rewards

There are two types of rewards - Target based and Extra points.

Target based enables you to set a milestone for a customer based on dollars spent, or points earned. Dollar targets can be set to be achieved either between two dates, within a period (eg previous 4 weeks), or in a single transaction. When the target is met, a pop-up screen advises you (when in the transaction screen), prompting you to issue the reward.

Extra points rewards simply allows you to set a higher points / dollar ratio for a particular period.

Each reward will need to be given a title, before being saved and made. An unlimited number of rewards can be created, saved and re-instated at later dates. Rules showing a tick are active.

Reporting

Arguably the most useful feature of CardSprint Loyalty, the reporting section enables you to analyse your customer's spending habits. Ensures you can reward them for continued patronage, or contact those you have not seen for some time.

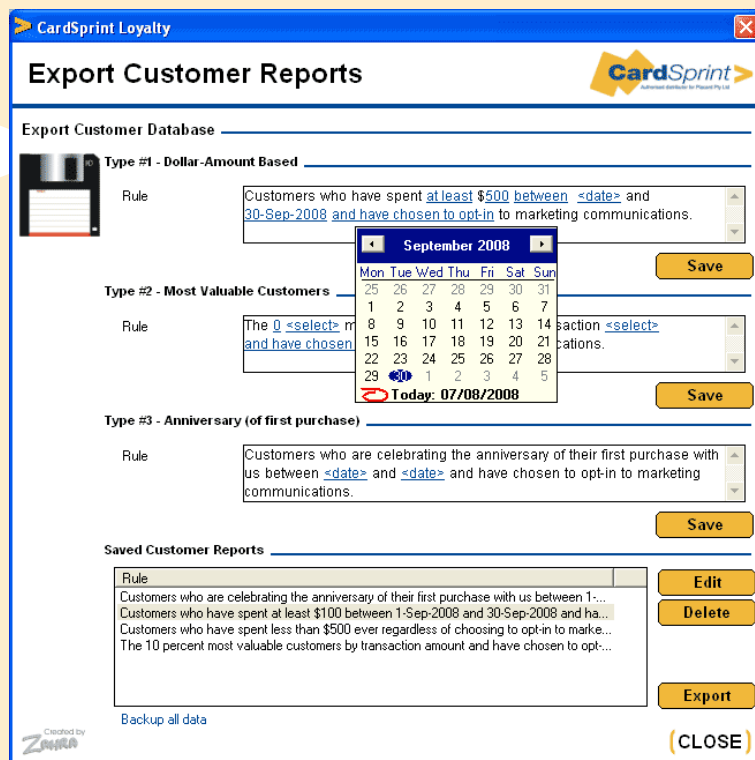
All reports are extracted as CSV files, so you can easily perform mail merge operations for marketing purposes.

Any number of rules may be saved and revisited at a later date. Options include excluding those who decided to opt out of marketing correspondence, as indicated in their profile screen.

Dollar-Amount Based reports lets you extract a list of customers who have spent at least, or less than, a certain amount within a given period.

Most Valuable Customer can tell you your top customers, either by percentage or number, based on amount spent, or frequency of visits.

Anniversary reports tell you how many years patronage your customers have given.



Backing Up

It is advisable to perform a back-up of CardSprint loyalty after each day of use. You can back-up manually through the *Admin* section, or wait until prompted to backup when closing down the program. The file is saved as an Access database file (.mdb), which contains all customer details and transactions. As a default, the file name is in a convenient date format, and will be saved in a C:/Program Files/CardSprint Loyalty/Backups. If needed, these files can be restored through the import/restore feature in the *Admin* section.