



# Reward/Referral Program

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## Introduction

This document describes The Edge **Reward/Referral Program**, which helps to reduce discounting, retain valued customers, and acquire new customers. The Edge **Reward/Referral Card Program** is an extension of the Tender Card feature and uses the same kind of tender card media for these two purposes.

## Rewards vs. Referral Cards

Rewards cards are designed as an incentive to encourage repeat sales to existing customers. Rewards cards increase in value each time a qualifying purchase is made; that value can be used towards a future purchase. Rewards cards can be issued to customers at the store owner’s discretion.

Referral cards serve a purpose in addition to functioning as a rewards card. Referral cards are preloaded with a dollar value and given to good customers to give to their circle of friends and relatives who have the potential to become customers. Referral cards can only be used by new customers. The preloaded dollar amount is an inducement to get potentially good customer to visit your store. Referring customers are rewarded when referred customers spend a predetermined threshold amount. Referral cards are a great way to add qualified buyers to your customer base.

Low cost of customer acquisition, increased sales and less discounting are three great reasons to consider this feature.

| Line | Stock#      | QTY | Description                                | Retail Disc %/\$                                      | Price Tax/Net |
|------|-------------|-----|--|---|---------------|
| 1    | Reward Card |     | Activate Reward Card #99001000042<br>Memo: | Bonus<br>Referral <input type="checkbox"/>            | \$25.00       |
| 2    | Reward Card |     | Activate Reward Card #99001000018<br>Memo: | Bonus<br>Referral <input checked="" type="checkbox"/> | \$50.00       |
| 3    | Reward Card |     | Activate Reward Card #99001000083<br>Memo: | Bonus<br>Referral <input checked="" type="checkbox"/> | \$50.00       |

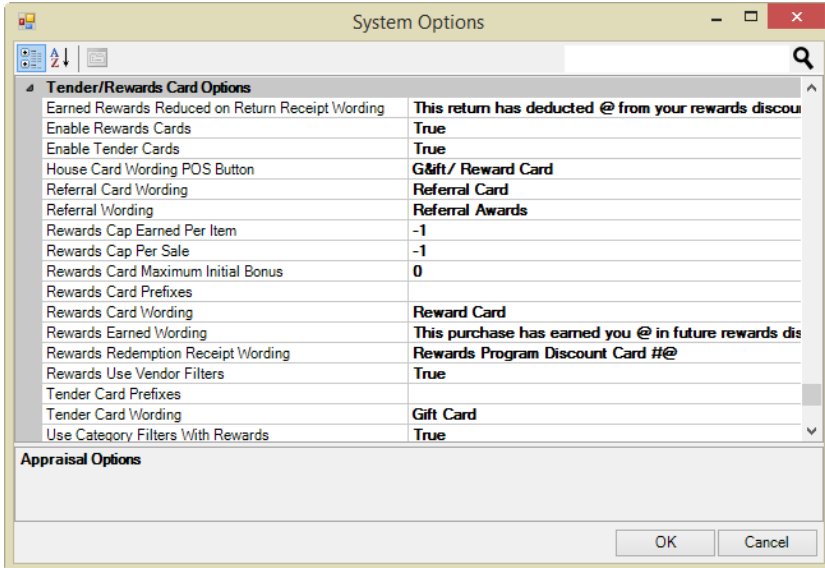
In the above illustration, you see that we are issuing a reward card to the present customer, with a \$25 initial value, and also two \$50 cards for him to give away.

## Set Up

### System Options

The first thing that must be set up to use the Reward/Referral feature is the **Tender/Rewards Cards Options** section in **System Options**.

1. From the **Administrative** menu, select **System Options**. The **System Options** screen will appear.
2. Scroll down to the **Tender/Rewards Card Options** area.



Options to set up include:

- Earned Rewards Reduced on Return Receipt Wording**      How to word returned deduction from rewards earnings on the receipt.
- Enable Rewards Cards**      Whether to enable rewards cards.
- Enable Tender Cards**      Whether to enable tender cards.
- House Card Wording POS Button**      A general phrase that describes either a tender card or rewards card. Used only on the tender buttons on the **Point of Sale (POS)** screen.
- Referral Card Wording**      How you refer to the card you give to a customer to in turn give to another.
- Referral Wording**      What you call the credit you give a customer for referring someone.
- Rewards Cap Earned Per Item**      Caps how much can be earned in rewards per sale item. Set this to -1 if you do not want a cap.
- Rewards Cap Per Sale**      The total amount that a sale can earn in a single rewards transaction. For example, if a sale is supposed to earn \$350 in rewards, but a cap of \$250 is set, then the sale will earn \$250. If set to -1, the cap will be ignored.
- Rewards Card Maximum Initial Bonus**      Maximum initial bonus that can be given without an override.

|   |   |
|---|---|
| <b>Rewards Card Prefixes</b>              | Prefixes that identify rewards cards.   |
| <b>Rewards Card Wording</b>               | How you refer to your Rewards or Loyalty cards.   |
| <b>Rewards Earned Wording</b>             | How to word reward earnings on a receipt. It might be best for <b>sales tax purposes</b> to word it as a future discount of sorts. For example, “This purchase has earned you ___ in future rewards discounts” where the blank is replaced by some dollar amount. |
| <b>Rewards Redemption Receipt Wording</b> | How to word reward card redemption on the receipt. It might be best for <b>sales tax purposes</b> to word it as some kind of discount.  |
| <b>Rewards Use Vendor Filters</b>         | Allows for items that pay out rewards to be filtered by vendor.   |
| <b>Tender Card Prefixes</b>               | Prefixes that identify tender cards.  |
| <b>Tender Card Wording</b>                | How you refer to your tender/give/refund cards.   |
| <b>Use Category Filters With Rewards</b>  | Allows for items that pay out rewards to be filtered by category.   |

3. Edit settings as required.
4. Click **OK** to save your changes.

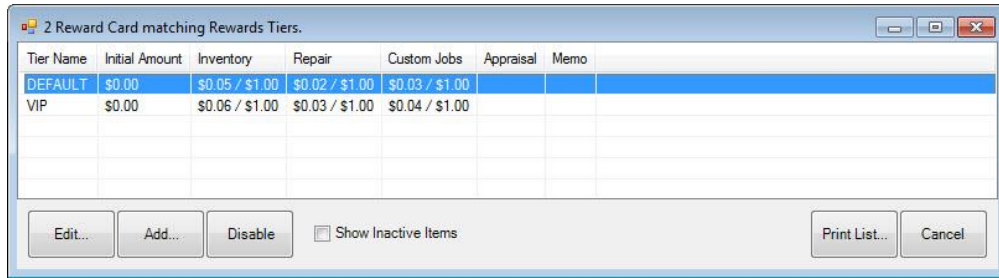
### Default Settings – Rewards Cards

While **System Options** enable how The Edge operates, **default settings** define typical use of the Rewards/Referrals Program. **Reward and referral settings** are set up from the **Administrative** menu. There are three areas in which to set up rewards and referrals:

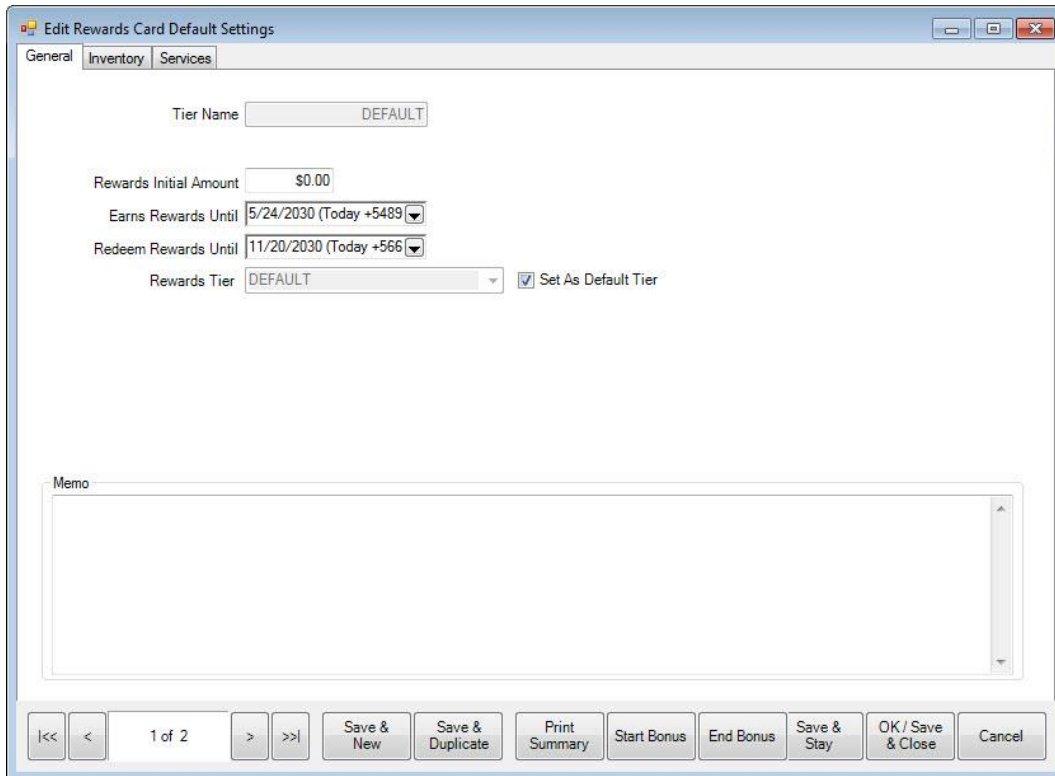
- Rewards/Tiers
- Assign Customer to Tiers
- Referral Program.

To set up rewards and tiers:

1. From the **Administrative** menu, select **Rewards Program=>Rewards/Tiers**.
2. The **Reward Card** screen will appear listing tier types. Tiers are reward levels, such as Gold, Platinum, etc. Tiers can be set up to define a category of sorts for rewards.



3. To add a tier, select **Add...** The **New Rewards Tier** screen will appear with the **General** tab open.

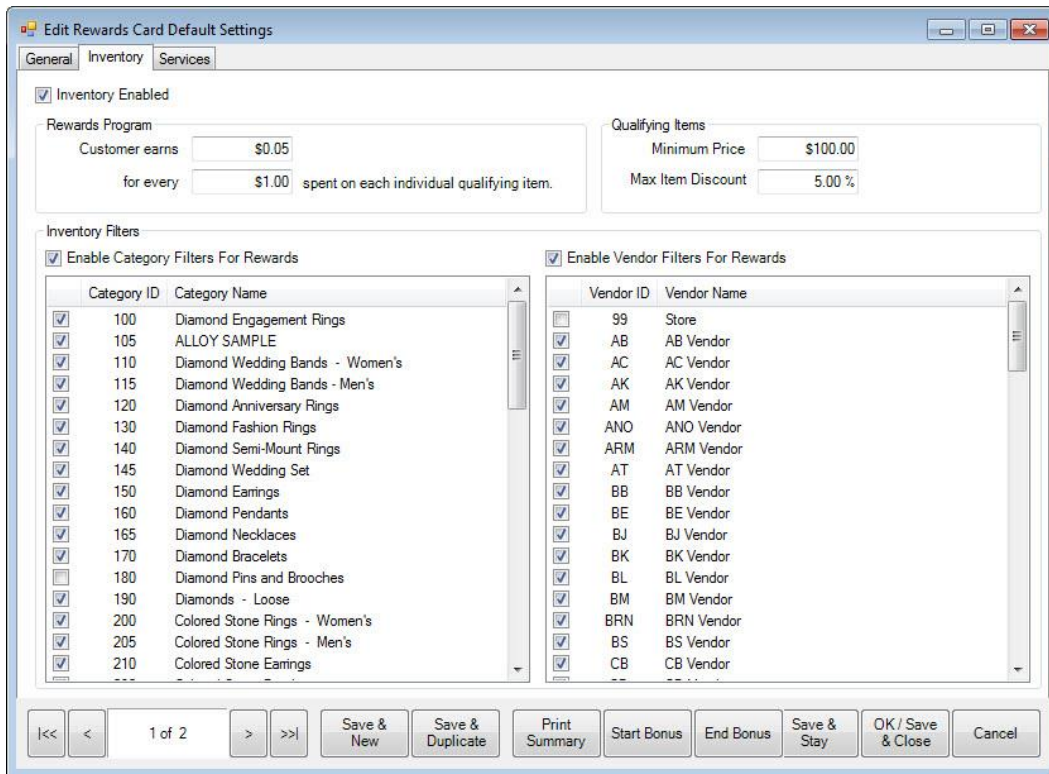


Fields and options in the **General** tab include:

- Tier name** Enter a name for the tier being defined.
- Rewards Initial Amount** The value that is initially on the rewards card for this tier when it is activated. At POS, you can change the value when activating a card; however, if it is over the maximum set in **System Options**, an override will be needed. If a card is activated at POS as a rewards card, this value is used. But if the card is activated as a referral card, then the referral initial amount is used. See the **Referrals** section below for more information.
- Earns Rewards Until** The date at which cards in this tier stop earning rewards.

- Redeem Awards Until**      The date at which cards in this tier are no longer redeemable.
- Set as Default Tier**      Sets the selected tier to be the default for all new reward cards issued going forward.
- Memo**                      A text field that allows you to enter any notes you may have.
- Start Bonus**                Allows you to set an additional reward percentage on specific items, for a specific date range, using the item filter. **TIP! To add bonus rewards on all qualifying items, leave the item filter blank.**
- End Bonus**                 Allows you to cancel or stop any active rewards bonus. **TIP! If you've made a mistake setting up bonus rewards, end bonus makes it easy to cancel that bonus and start over.**

4. Complete fields in the **General** tab as desired.
5. Select the **Inventory** tab.



Fields and options in the **Inventory** tab include:

- Inventory Enabled**              Enables the option to specify which inventory earns rewards.
- Customer Earns...For Every**      The values that are used to calculate how much a customer earns in rewards for every unit of money spent. For instance, if a customer can

earn .06 for every dollar spent, on a \$21.00 sale, the customer would earn \$1.26 in rewards.

**Minimum Price** The lowest amount for which an item sold can accrue rewards. The \$21.00 item would earn rewards if the **Minimum Price** is set to \$20.00. However, if the Minimum Price is set to \$25.00, the \$21.00 sale would not earn rewards.

**Max Item Discount** The **maximum percentage** that an item can be discounted and still count towards the rewards program. This is calculated by taking the price for which the item is sold and comparing it with the retail price. If an item has a retail price of \$100.00 and it is sold for \$70.00, the discount would be 30 percent.

**Print Summary** The **Print Summary** button allows you to print the tier’s settings for reference.

**Category Filters** If enabled, allows you to select which categories pay out rewards. If you check the box, the items in this category will pay rewards. If you uncheck the box, it will not pay rewards. **TIP! If you want to select all or none, right click and select Check All or Check None.**

**Vendor Filters** If enabled, allows you to indicate that items from specific vendors pay out rewards. If you check the box, the items from this vendor will pay rewards. If you uncheck the box, it will not pay rewards. **TIP! If you want to select all or none, right click and select Check All or Check None.**

**IMPORTANT!**

**If you’re using *both* category and vendor filters, an item will only receive rewards *if* both the vendor *and* category for that item are marked selected for the rewards program.**

6. Complete fields in the **Inventory** tab as desired.
7. Select the **Services** tab.



The **Services** tab functions the same as the **Inventory** tab but allows rewards to be paid out on specified repairs, custom jobs, and appraisal services.

8. Complete fields in the **Services** tab as desired.
9. Select **OK/Save and Close**.

### Best Practices for Creating Tiers

Add additional tiers if you plan to reward customers at different levels. For example:

- Tier 1 may pay \$.03 for every \$1.00 spent
- Tier 2 may pay \$.05 for every \$1.00 spent.

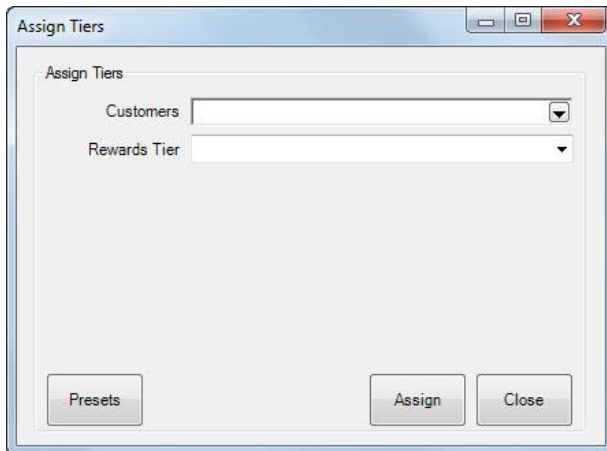
When adding a new tier, the same field definitions apply except the Category and Vendor filters. Category and Vendor filters are specified under the default tier only. The same Category and Vendor filter applies to all rewards tiers.

## Assigning Tiers

Customers can be reassigned to different tiers at any time. Tier assignment will appear on the customer account **Rewards** tab so it is easy to see when the level of rewards was changed.

To assign existing customers to tier levels:

1. From the **Administrative** menu, select **Rewards Program=>Assign Customers to Tiers**. The **Assign Tiers** screen will appear.



2. Use the **Customers** field to filter and select the customers to assign.
3. Use the **Rewards Tier** drop-down menu to select the tier to which the selected customers should be assigned.
4. Select **Assign**. A list of customers meeting the filter requirements will appear.
5. Check the customers to assign.
6. Select **OK**. A confirmation window will appear.
7. Select **OK**.
8. Close the **Assign Tiers** window by selecting **Done**.

### NOTE!

**If no customer filters are set, a confirmation asking if you wish to assign all customers will appear.**

## Referral Cards

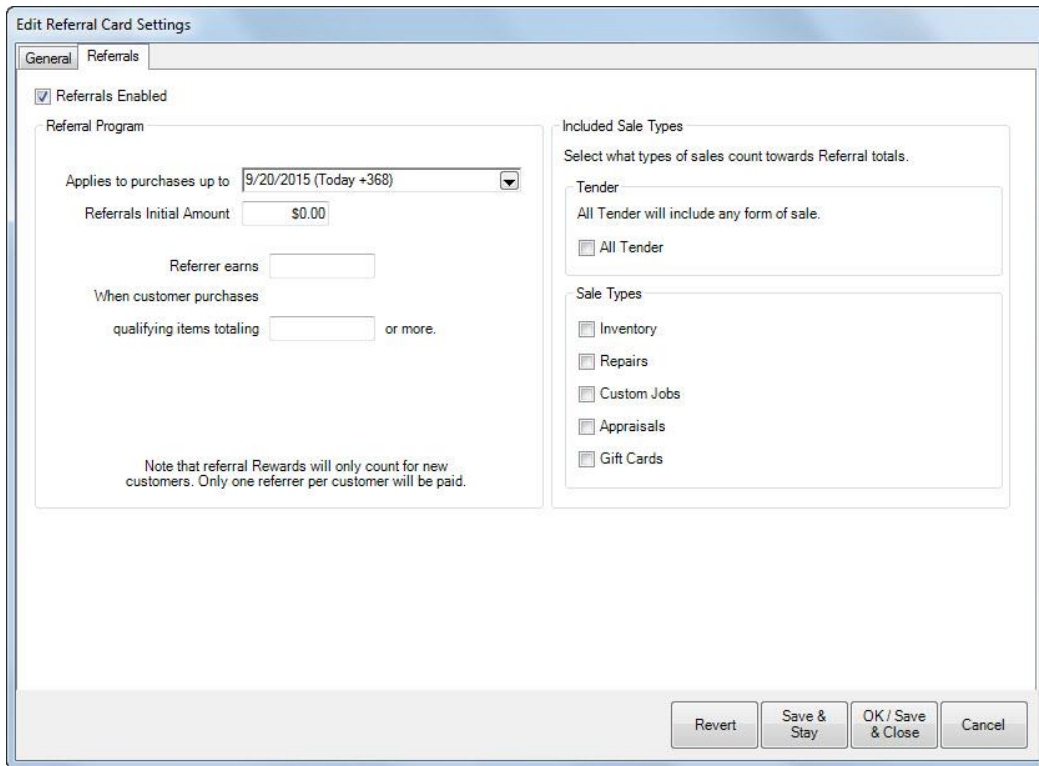
To work with referral cards:

1. From the **Administrative** menu, select **Rewards Program=>Referral Program**. The **Edit Referral Card Settings** screen will appear with the **General** tab open.

The screenshot shows a dialog box titled "Edit Referral Card Settings" with two tabs: "General" and "Referrals". The "Referrals" tab is active. It contains the following fields and controls:

- Tier Name:** A text input field containing the value "DEFAULT".
- Referral Card Expiration Date:** A date picker dropdown menu showing "11/18/2030 (Today +566)".
- Memo:** A large, empty text area for entering notes.
- Buttons:** Four buttons are located at the bottom right: "Revert", "Save & Stay", "OK / Save & Close", and "Cancel".

2. Because this is the setup area, the card number is not applicable. These settings will be applied to each **newly issued card** as the default.
3. Select a redeem rewards date from the **Referral Card Expiration Date** drop-down menu.
4. Select the **Referrals** tab.



Fields and options in the **Referrals** tab include:

- Referrals Enabled**                      Indicates that the card can be used for referral bonus money as well as rewards. This can be used to provide a retroactive referral bonus.
- Applies to purchases up to**                      For the referrer to get a bonus, the date by which the referee must spend the qualifying amount as entered in the **When customer purchases qualifying items totaling or more** field.
- Referrals Initial Amount**                      The initial amount of the referral card.
- Referrer Earns...**                      The amount the referring customer will get when the referred customer makes a purchase. This takes the form of a credit memo.
- ...When customer purchases qualifying items totaling or more**                      The amount which the referred customer must spend for the referring customer to earn the bonus as indicated above.

**Included Sale Types**      Types of sales to include in this referral account:

- All Tender**
- Inventory**
- Repairs**
- Custom Jobs**
- Appraisals**
- Gift Cards.**

**Sale Types**      Allows you to filter what types of sales count towards the qualifying items totals. Example: If you want to include repairs, not just inventory. **NOTE! Checking All Tender will disable filtering by sale types.**

5. Complete the fields in the **Referrals** tab as required.
6. Select **OK/Save and Close**.

## Activating Rewards Cards with the Physical Card

There are two ways to activate rewards and referral cards with the physical card in hand: Through **POS** and through the **Rewards** menu.

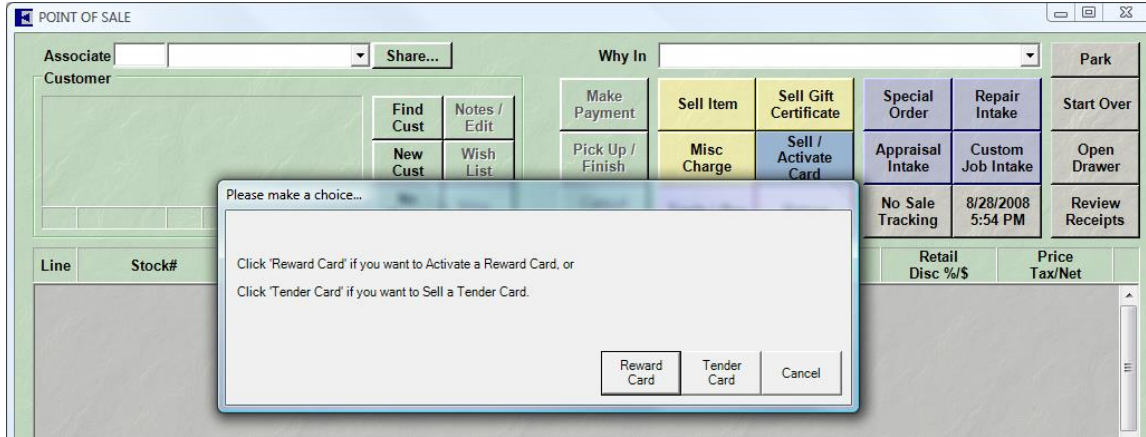
### NOTE!

**Only one original value will be used for the card. Initial Amount are now locked on records. If for some reason they need to be unlocked and changed, which we strongly advise against, the supervisor menu has a lock and unlock function for the original amounts on it.**

## Scan New Card at POS

The easiest way to activate a new card at POS is to scan it. It is not necessary to select any buttons before scanning the card.

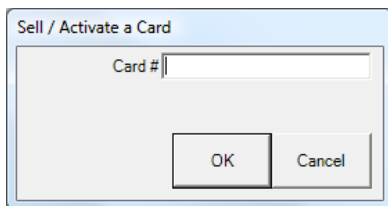
**Note** that the **prefix numbers** in the card indicate whether it is a **Reward Card** or **Tender Card**. If you have not specified prefixes in **System Options** for reward cards vs. tender cards, then a window will pop up to ask you what type of card you want to activate.



After you make your selection (or immediately after scanning, if you have specified prefixes), a **Reward Card** or **Tender Card** line will be added to the sale.

### Using the Activate Card Button

1. From the POS screen, select the **Sell/Activate Card** option. The **Sell/Activate a Card** screen will appear.



2. Scan the card or type in the card number.
3. If prefixes that specify card type are set in **System Options**, you can proceed with entering the value. If not, you will be prompted to select the card type (if necessary), and select OK, then a line will be added to the sale.

| Line | Stock#      | QTY | Description                        | Retail Disc %/\$                  | Price Tax/Net |
|------|-------------|-----|------------------------------------|-----------------------------------|---------------|
| 1    | Reward Card |     | Activate Reward Card #990010000042 | Bonus                             | 0.00          |
|      |             |     | Memo:                              | Referral <input type="checkbox"/> |               |

#### TIPS!

- If the card is already active, an error message will appear.
  - If the customer to whom you are trying to assign the card already has a rewards card, you will be prompted to consolidate the rewards to this new card; the old card will become inactive.
  - If you are assigning a new card, you cannot ring out any merchandise or services on the same transaction.
4. The initial amount/bonus amount will be taken from your default setup and added to the resulting sale line. Otherwise, enter the card value.

## Activating a Rewards Card from Rewards Activation

To activate a rewards card from the **Rewards Activation** screen:

1. From the **Customer** menu, select **Rewards=>Activate**. The **Edit Rewards Card** screen will appear with the **General** tab open.

2. With a few exceptions, the fields and options are the same as the **Edit Rewards Default Settings**. The default settings will populate the screen. Enter or accept values as desired. If you type in an amount that exceeds the maximum specified in your system options, then a pop-up window will appear requiring an override to continue.
3. Enter a card number in the **Starting Number** field. Alternatively, if you are activating a number of cards with sequential numbering and the same settings, you may enter the **Starting Number** and the **Ending Number**. If you intend to scan the numbers in, select the **Scan and Save** option and begin scanning numbers. These need not be sequential.

### TIPS!

- You do not have to fill in the issued to or referred by customer fields. These can be blank.
- If you want to set up a number of cards and then activate them at POS with these settings. If you do fill out the issued to customer field and the referred by customer field, the card will default to a rewards card and will not pay out on the referred by because it will not be a new customer at this point.

To activate a new card for a specific customer:

1. Select **Customers => Rewards => Find >> Select a Rewards Card.**

### Activating Rewards Cards *without* the Physical Card – Single Customer

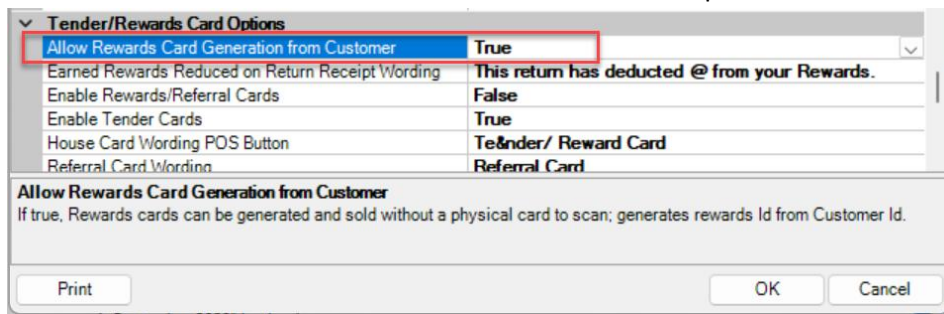
There are two ways to activate rewards and referral cards without the physical card in hand:

Through **POS** and through the **Customer** menu. You have the option to activate for a **single customer** or activate for **multiple customers** at once using the Bulk Activation method.

### Required Setup to Enable Activating without the Physical Card

This feature must be enabled via a **system option** before it can be used at POS.

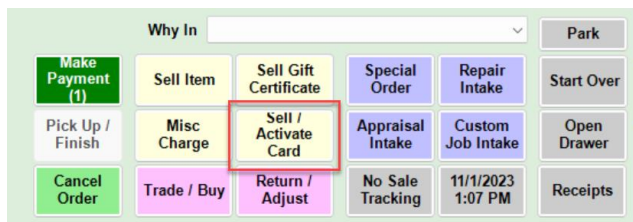
1. Click **Administrative > System Options.**
2. Scroll down to **Tender/Rewards Card Options.**
3. Set the **Allow Rewards Card Generation From Customer** option to **True.**



### Activating Rewards at POS without the Physical Card

To activate a Rewards Card at POS **without** the card for a **single customer**:

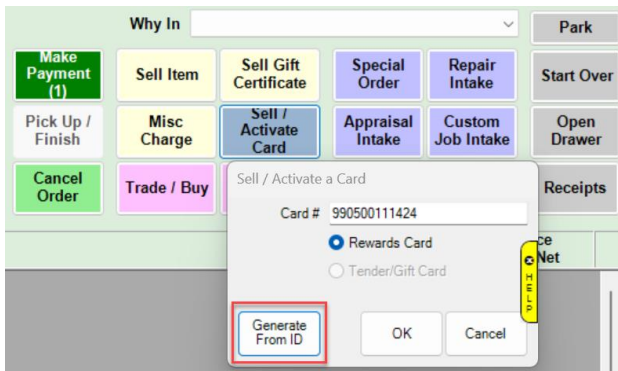
1. Open **POS** and either **Find** or **Add** your customer.
2. Click the new **Sell/Activate Card** button. **Note:** If you enabled this feature but still see the former **Sell Tender Card** button, make sure you have **Rewards/Referral Cards** set to **True** in your **System Options.**



3. Select the **Rewards Card** option, then click the **Generate From ID** button at the bottom. **Note:** This feature is **ONLY** available for **Rewards Cards**. You **cannot** generate a **Tender/Gift Card** using



the **Generate From ID** button.



4. Add a memo in the **Memo** line if you choose, then click **Done** to complete activation of the **Rewards Card**.

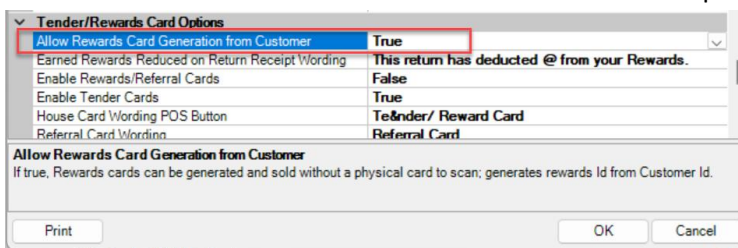
### Activating Rewards Cards *without* the Physical Card – Bulk Customers

There are two ways to activate rewards and referral cards without the physical card in hand: Through **POS** and through the **Customer** menu. You have the option to activate for a **single customer** or activate for **multiple customers** at once using the Bulk Activation method.

### Required Setup to Enable Activating without the Physical Card

This feature must be enabled via a system option before it can be used. You may skip this step if you have already followed setup steps for the original **Rewards Activation No Card – Single Customer** feature.

1. Click **Administrative > System Options**.
2. Scroll down to **Tender/Rewards Card Options**.
3. Set the **Allow Rewards Card Generation From Customer** option to **True**.

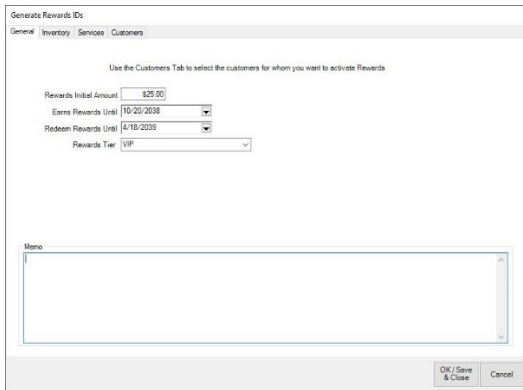


### Activating Rewards without the Physical Card – Bulk Customers

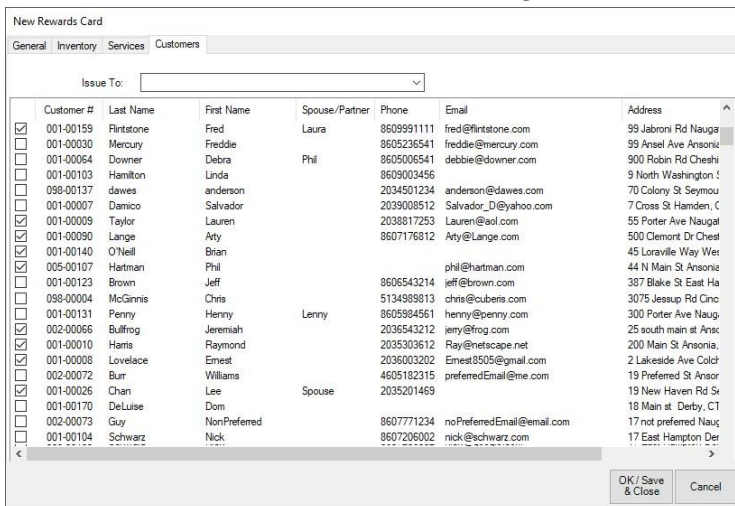
This feature must be enabled via a system option before it can be used. You may skip this step if you have already followed setup steps for the original **Rewards Activation No Card – Single Customer** feature.

To activate Rewards for multiple customers at once:

1. Click **Customer > Rewards > Activate > Generate #**. The **Generate Rewards ID** window will open.



2. With a few exceptions, the fields and options are the same as the **Edit Rewards Default Settings**. The **default settings** will populate the screen. **Enter or accept** values as desired. If you type in an amount that **exceeds the maximum** specified in your **System Options**, then a pop-up window will appear requiring an **override** to continue.
3. After setting desired options on the **General, Inventory, and Services** tab, click on the **Customer** tab.
4. On the **Customer** tab, use the **Issue To:** drop-down to open a customer filter where you can enter criteria to select customers. Matching customers will be displayed.



5. Use the **checkboxes** to select the customers you would like to activate rewards for and click **OK**.

## Accruing Rewards

At POS there is a rewards button that appears up by the customer's name. This will bring up a picker that shows all the sale items that qualify for rewards and the amounts that would be earned. If you

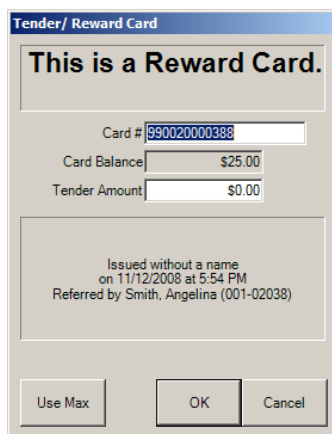
want to exclude some item on the sale from earning rewards, uncheck the box next to the item and it will not earn rewards.

To adjust a customer’s rewards amount, go to the customers edit screen and adjust the balance. This will write out a history row for traceability.

After loading a customer at POS, you can select **Rewards** and the form title will have their balance in it.

### Identifying the Customer at POS

Rewards are accrued by identifying the customer via his reward card. This can be done by scanning the card at POS. Instead of searching for the customer record, you can scan the customer’s reward card. The customer will be identified, and the **Tender/Reward** card window will pop up so that you can see the card balance and any notes you may have added to the card record. You can dismiss the pop-up window by selecting **Cancel** or by pressing the **ESC** key on your keyboard.



**Note** that if this is a referral card, and this is a new customer, then of course the card will not automatically identify the customer, but, having scanned the card, you can see who the referrer was and the balance on the card. As soon as you enter the new customer, the card will be associated with that customer and the customer can be automatically identified by the card on the next visit.

Whenever a rewards card is associated with the current sale, the card number will appear above the customer name as shown below.



If a rewards card is issued to a particular customer, then that customer will accrue purchase rewards every time they make a qualifying purchase, **whether or not they present the card at each visit.**

Each qualifying item on the receipt will indicate the reward earned.

|  |   |   |          |
|--|---|---|----------|
| 200-00013<br><br>Purchase |  | Lady's Yellow 14 Karat<br>Princess Di Fashion Ring<br>with Tourmaline and<br>Diamonds<br>This purchase earned you<br><b>\$40.00 in rewards.</b> | \$891.00 |
|--|---|---|----------|

If you have selected the option to show balances on receipts, then reward card balances will be included in that section.

|  |           |
|--|-----------|
| Balance(s) as of 8/29/2008 1:18:37 PM... |           |
| Repair #001-00022-001 5/29/2004...       | \$62.00   |
| Reward Card #990010000042 8/28/2008...   | (\$65.00) |
| Total Due...                             | (\$3.00)  |

## Redeeming Rewards

### Purchase Rewards

Because purchase rewards are posted to a specific rewards card, the only way to spend the reward is to take the reward card as tender.

### Referral Rewards

Because referral rewards are posted to the referring customer's credit memo account, the only way to spend referral rewards is to use the customer's credit memo account as tender.

## Reporting

### Customer Statements

Referral awards show up on the referring customer's statement under the credit memo account. The credit will be identified as to who the new customer was.

| Date       | Receipt#  | Detail   | Amount                |
|------------|-----------|--|-----------------------|
| 08/28/2008 | 001-00029 | <b>Credit Memo</b><br>Referral award (Bob Newby) | 25.00<br><b>25.00</b> |

## Rewards-Specific Reports

Rewards-specific reports can be found by visiting **Reports => Customers => Rewards** – Then selecting one of the 3 reports outlined below:

- **Detail:** The Rewards Detail report shows merchandise purchased affecting rewards and the amount rewarded.
- **Summary:** The Rewards Summary report generates a list of customers who have rewards cards including their card’s general activity.
- **Referral:** The Rewards Referral report shows the referral cards issued to customers for distribution, what customers have them, and card activity.

## Administrative Functions

### Find Card Records

To look up the details of one or more reward/referral card:

1. From the **Customer** menu, select **Rewards => Find**. The **Find** screen will appear.

The screenshot shows a 'Find Rewards Cards' dialog box with the following fields and options:

- Card #: [Text Input]
- Referred by: [Dropdown]
- Issued To: [Dropdown]
- Used by: [Dropdown]
- Date Activated: [Dropdown, All Dates]
- Date Used: [Dropdown, All Dates]
- Expires: [Dropdown, All Dates]
- Redeem By: [Dropdown, All Dates]
- Memo: [Text Input]
- Include: [Dropdown, Both Empty and Cards with a Balance]
- Tier: [Dropdown]
- Buttons: Presets..., OK, Cancel

Fields and options in the **Find Rewards Card** screen include:

- **Card #** Yields a card specified by typing in the number or scanning the card.

- Referred By** Yields records of referral cards by the customer who had them to give away.
- Issued To** Yields records of cards according to the customer to whom they were issued.
- Used By** Yields records of carts according to the customer who redeemed them.
- Date Activated** Yields cards activated during a specified date range.
- Date Used** Yields cards used within a specified date range.
- Expires** Yields cards set to expire during a specified date range.
- Redeem By** Yields cards that must be redeemed by a specified date range.
- Memo** Yields records that have a keyword in the memo.
- Include** Yields cards that have a balance.
- Tier** Yields cards that fall into a specified tier.

2. Complete the filters as desired.
3. Select **OK**. A list of matching card records will appear.

| Card #       | First Name | Last Name   | Customer ID # | Date Issued           | Date Expired | Redeem By | Most Recent | Balance  | Tier           |
|--------------|------------|-------------|---------------|-----------------------|--------------|-----------|-------------|----------|----------------|
| 993000005278 | Mike       | Abbott      | 001-00652     | 9/12/2014 9:53:04 AM  | 7/6/2029     | 1/2/2030  |             | \$265.63 | DEFAULT        |
| 994700000015 | Ryan       | Tahlequah   | 002-33515     | 12/18/2013 1:47:31 PM | 10/11/2020   | 4/9/2029  |             | \$15.00  | System Default |
| 994700000023 | Richard    | Abbott      | 002-41458     | 10/9/2013 11:24:43 AM | 10/13/2028   | 4/11/2029 |             | \$0.00   |                |
| 994700000031 | Cash       | Moore       | 001-03383     | 12/18/2013 1:48:33 PM | 10/11/2028   | 4/9/2029  |             | \$227.88 | VIP            |
| 994700000056 | Ann        | Kaaawa      | 002-06049     | 12/18/2013 1:47:35 PM | 10/11/2020   | 4/9/2029  |             | \$15.00  | DEFAULT        |
| 994700000064 | Gerald     | Adell       | 002-00811     | 10/9/2013 11:25:21 AM | 10/13/2028   | 4/11/2029 |             | \$0.00   |                |
| 994700000098 | Alana      | Vachere     | 002-05564     | 12/18/2013 1:47:35 PM | 10/11/2020   | 4/9/2029  |             | \$15.00  | DEFAULT        |
| 994700000106 | Adam       | Cahone      | 002-40747     | 10/9/2013 11:26:46 AM | 10/13/2028   | 4/11/2029 |             | \$0.00   |                |
| 994700000114 | Mike       | Boxholm     | 002-35021     | 12/18/2013 1:48:33 PM | 10/11/2028   | 4/9/2029  |             | \$215.88 | VIP            |
| 994700000130 | Justin     | Waddell     | 002-40965     | 12/18/2013 1:47:36 PM | 10/11/2020   | 4/9/2029  |             | \$15.00  | DEFAULT        |
| 994700000148 | Mark       | Pageton     | 002-36259     | 10/9/2013 11:33:25 AM | 10/13/2028   | 4/11/2029 |             | \$0.00   |                |
| 994700000155 | Travis     | Dumfries    | 002-35751     | 12/18/2013 1:48:34 PM | 10/11/2028   | 4/9/2029  |             | \$0.00   | VIP            |
| 994700000171 |            |             |               | 12/18/2013 1:47:36 PM | 10/11/2020   | 4/9/2029  |             | \$15.00  | DEFAULT        |
| 994700000189 | Jeremy     | Quay        | 002-13725     | 10/9/2013 11:33:45 AM | 10/13/2028   | 4/11/2029 |             | \$0.00   |                |
| 994700000197 | Margaret   | Eureka      | 002-38496     | 12/18/2013 1:48:34 PM | 10/11/2028   | 4/9/2029  |             | \$0.00   | VIP            |
| 994700000213 | Shane      | Yarnell     | 002-13446     | 12/18/2013 1:47:37 PM | 10/11/2020   | 4/9/2029  |             | \$15.00  | DEFAULT        |
| 994700000221 | Richard    | Raccoon     | 002-21175     | 10/9/2013 11:34:04 AM | 10/13/2028   | 4/11/2029 |             | \$0.00   |                |
| 994700000239 | Marie      | Alleene     | 002-24709     | 12/18/2013 1:48:35 PM | 10/11/2028   | 4/9/2029  |             | \$0.00   | VIP            |
| 994700000254 | Dave       | Pipersville | 002-14000     | 12/18/2013 1:47:37 PM | 10/11/2020   | 4/9/2029  |             | \$15.00  | DEFAULT        |
| 994700000270 | Jean       | Gonzales    | 002-36659     | 12/18/2013 1:48:44 PM | 10/11/2028   | 4/9/2029  |             | \$0.00   | VIP            |
| 994700000296 | Brad       | Bellefonte  | 001-00419     | 12/18/2013 1:47:38 PM | 10/11/2020   | 4/9/2029  |             | \$15.00  | DEFAULT        |
| 994700000304 | Adam       | Sabana      | 002-39921     | 10/9/2013 11:34:49 AM | 10/13/2028   | 4/11/2029 |             | \$0.00   |                |
| 994700000312 | John       | Hoonah      | 002-29894     | 12/18/2013 1:48:45 PM | 10/11/2028   | 4/9/2029  |             | \$0.00   | VIP            |
| 994700000338 | John       | Eagle       | 002-19068     | 12/18/2013 1:47:38 PM | 10/11/2020   | 4/9/2029  |             | \$15.00  | DEFAULT        |
| 994700000346 |            |             |               | 10/9/2013 11:37:25 AM | 10/13/2028   | 4/11/2029 |             | \$50.00  |                |
| 994700000353 | Annette    | Dayville    | 001-03612     | 12/18/2013 1:48:45 PM | 10/11/2028   | 4/9/2029  |             | \$0.00   | VIP            |
| 994700000379 | Pam        | Fagus       | 002-40321     | 12/18/2013 1:47:39 PM | 10/11/2020   | 4/9/2029  |             | \$15.00  | DEFAULT        |

4. Select the record with which you wish to work.
5. Double click or select **Edit**. The **Edit Rewards Card** screen will appear.

The **General** Tab shows the use of the card. The **Inventory**, **Services**, and **Referrals** tabs break down what the customer should earn for each type of sale. **Note** the defaults will be used unless otherwise specified.

The **History** tab shows when the card was used at POS. Both qualifying purchases and redemptions are listed. To see qualifying purchases, select **See Item** or **See Sale**. Note that **See Item** is not enabled for redemptions because redeeming rewards is treated as tender and is not strictly associated with the item or items that were purchased with the reward.

## Supervisor Functions

Below are procedures for some common supervisory functions.

### Balance Adjustments

Reward card balances can be adjusted on the **Customer Edit** screen in the **Balances** tab, just like any other balance.

### Void a Card

To "void" a card, adjust the balance down to zero, then edit it and change the assigned customer name.

### Replace a lost or stolen card

To replace a lost or stolen card, void it as above, and then issue a new card to the customer. The balance will be forwarded to the new card.

## Merge Cards

To merge two cards, void one of them as above, and then adjust the balance of the other card.

## QuickBooks Integration

Referral rewards are immediately credited to the referring customer's credit memo account. As such, in your **General Ledger**, it will be posted as a liability in your account that corresponds to our "Liabilities » Store Credits" account. This will be offset by an expense in your account that corresponds to our "Expense » Referral Fees" account.

Purchase rewards are not a true liability as they are only a promise of a future discount (one that can expire), similar to a coupon. As such, purchase rewards are not posted to the General Ledger until they are redeemed. When a customer redeems a purchase reward, it will be posted as an expense in your account that corresponds to our "Expense » Rewards" account.

It is **strongly recommended** that you make an appointment with [support@ajsllc.com](mailto:support@ajsllc.com) to adjust your Edge/QuickBooks setup for the rewards program.

## FAQ (Frequently Asked Questions)

### What if somebody returns an item?

If the item was bought with rewards, the rewards points will be returned to the rewards card of the customer **returning** the item.

If the item earned rewards, the rewards will be removed from the card they were **awarded** to.

### What if I void a sale?

Whatever effect the sale had on rewards will be undone.

### How does redeeming a reward affect commissions?

Not at all. The selling associate will get the same commission as if no rewards were redeemed. However, that line on the commission report will be flagged with an "R" for rewards so that you can make an adjustment if you want.

### Can purchase rewards be accumulated and redeemed on the same sale?

No. Redeeming rewards on a sale excludes that sale from accumulating any purchase rewards. However, referrer awards will accrue for that referring customer, if applicable.