Rewards Notifications

Overview

Added as an expansion to the already existing **Automated Notifications** feature, you can now create templates and rules for text and email **Reward Notifications** to have **Rewards Activation** and **Rewards Balances** automatically sent out when the conditions of the rules are met. The **Rewards Notification** feature comes with two brand-new Notification Types: **New Card** and **Balance Update**.

These new **Notification Types** give you the opportunity to provide customers with **instant confirmation** of their **Rewards program activation** from POS directly to their preferred contact method, as well as receive **Rewards balance reminders** showing how much they have earned by shopping at your store.

> Please visit the Automated Notifications section of the EdgeUser knowledgebase for how-to documentation and tutorial videos covering other available **Notification types**.

Requirements

Prior to using the **Rewards Notification** feature, you must first make sure you have the **Rewards program activated** in your Edge.

To **activate** your **Rewards** program**:**

1. Navigate to **Administrative > System Options > Tender/Rewards Card Options.**
2. Scroll down to the **Tender/Rewards Card Options** section.
3. Locate the option labeled **Enable Rewards/Referral Cards** and set to **True**.

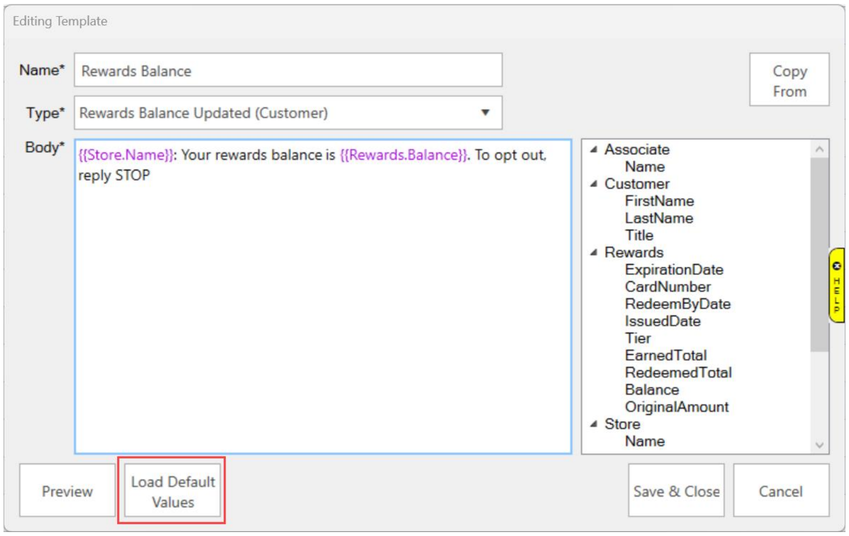
> Please visit the Rewards/Referral Setup section of the EdgeUser knowledgebase for more available Rewards System Options, as well as step-by-step instructions for setting up Rewards tiers, best practices, redeeming Rewards, and more.

Working with Rewards Notifications

Creating Templates

While the Edge comes with **Default Rewards Templates** you may use for your **Rewards Notifications**, you must still create and manually save your template for use with this feature.

This step is required, as Edge **will not** automatically send any default template as your notification without you first creating one.



To create a **Notification Template:**

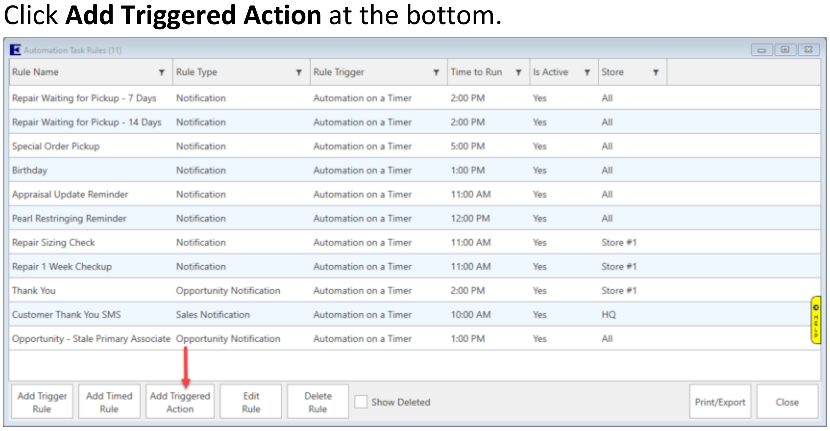
1. Click **Administrative > Notifications > Manage Notification Templates**.
2. Click the **Add New Email** or **Add New SMS** button at the bottom.
3. Select your **Notification Type** from the **Type** menu and enter a **Name**.
4. Click **Load Default Values** to load the default template or use available **merge fields** to create a custom template.
5. **Create** and **save** your template. For assistance on customizing your template, see our **Notification Templates** documentation.

Creating Triggered Actions

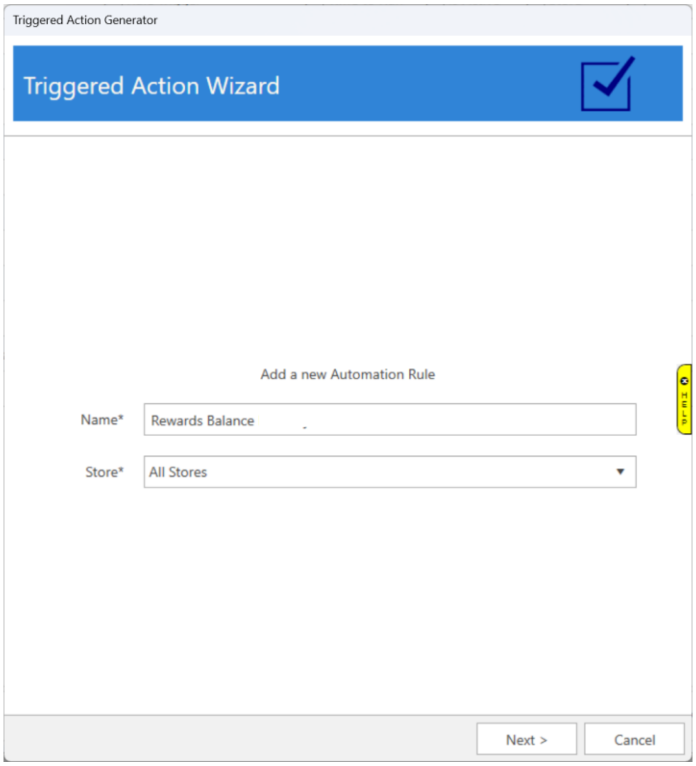
After creating and saving your templates, the next step is to create the **Triggered Action**.

To create a **Rewards Notification** action:

1. Click **Administrative > Automation Rules> Automation Rules.** The **Automation Task Rules** window will open.
2. Click **Add Triggered Action** at the bottom.



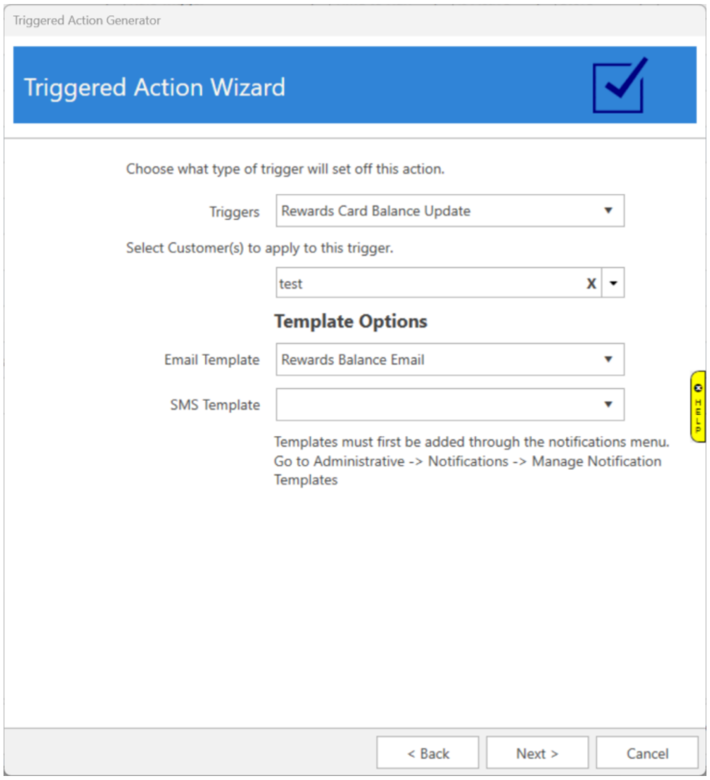
3. Enter a **Name**, then click **Next.** In this example, we will create a **Triggered Action** for **Rewards Balances**.



4. Choose **Rewards Card Notification**, then click **Next**.

5. At the top, select **Rewards Card Balance Update** under the **Triggers** dropdown menu.

6. The **Select Customer(s)** dropdown menu will open the **Find Customer** window. Enter any desired criteria and click **OK**.



7. Select an **Email** or **SMS Template.** You can specify both if you like.
8. Click **Next** then **Finish**.

> Repeat these steps but instead **select New Rewards Balance** from the **Triggers** dropdown menu to create the **Triggered Action** for **Rewards Card Activation** notifications.

Editing Rules

To edit an existing rule:

1. Click **Administrative > Automation Rules > Automation Rules.**
2. Use the **Edit Rule** button or double click the rule you wish to open.
3. Use the **Next** button to step through the wizard and make your desired changes.
4. Click **Finish** at the end to save your changes.

Deleting/Undeleting Rules

To delete an existing rule:

1. Click **Administrative > Automation Rules > Automation Rules**.
2. Select the rule you wish to delete.
3. Click the **Delete Rule** button at the bottom.

To undelete a rule you deleted:

1. Click **Administrative > Automation Rules > Automation Rules**.
2. Check the **Show Deleted** box at the bottom.
3. Deleted rules will appear in red font. Select the deleted rule you wish to undelete and use **Edit Rule** to open it.
4. Click the **Next** button through the wizard making any desired changes along the way.
5. Click **Finish** at the end to complete undeleting this rule.