



# PROGRESSIVE LOYALTY

Create lasting  
relationships  
with your  
customers

## PROGRESSIVE LOYALTY

V1.2.1

## 1. WELCOME

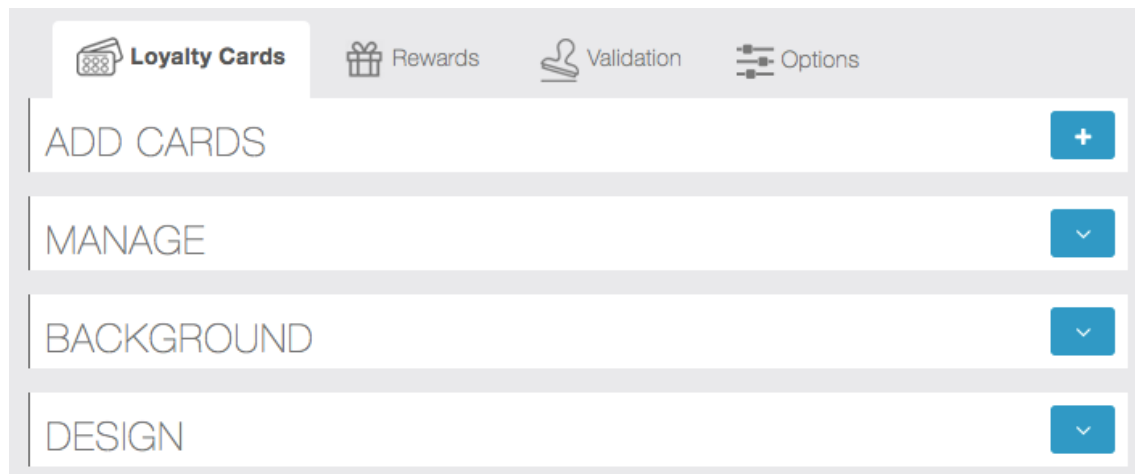
The **Progressive Loyalty** Siberian CMS module will allow you to launch a loyalty program and reward your customers as they buy from you. On the same loyalty card, you can setup several rewards and the customer will be able to redeem them as enough points are accumulated.

With a powerful reporting engine, you can easily identify your most loyal customers and how many rewards are used. You will also get an estimate on the sales that the loyalty program is generating you. Finally, you can track the employees who validate the points and the rewards so that fraud is under control.

## 2. SETUP

Once you've installed the zip file through the Siberian CMS back-office, the setup of the **Progressive Loyalty** Module is comprised of 5 steps. You'll need to access the Loyalty Cards tab (figure 2.1) in order to begin this process.

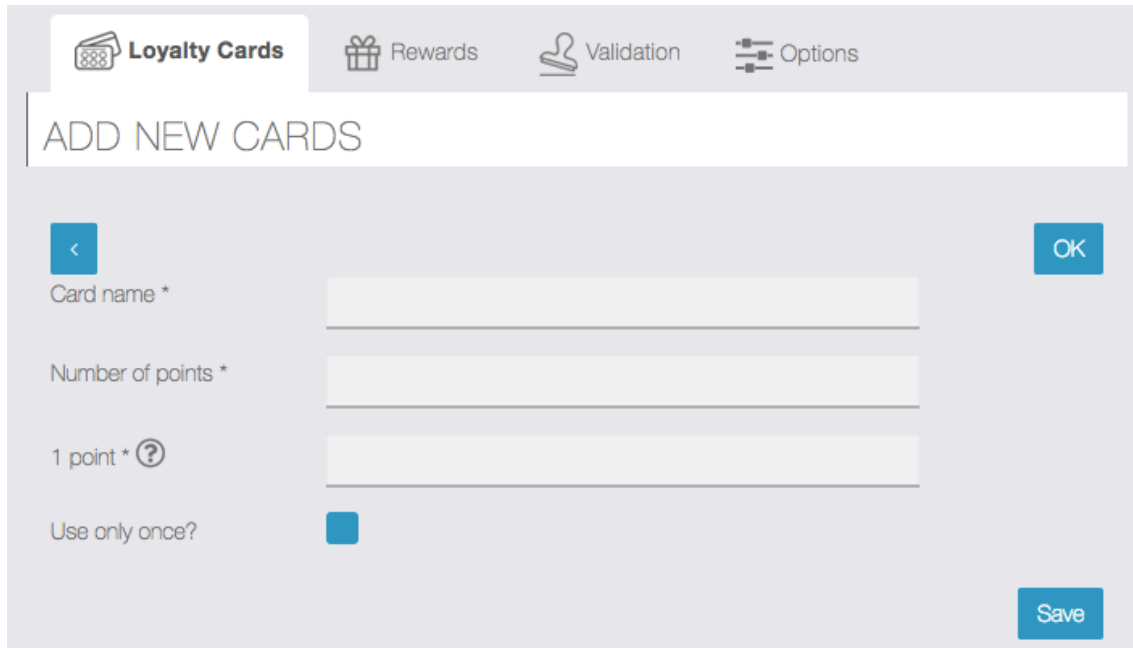
Figure 2.1 – Loyalty Cards



### A. LOYALTY CARD

The first step is to create a loyalty card (figure 2.A.1). You'll need to name your card – this will be used on the reporting but won't be seen by the users -, set the number of points for the card, define whether this is a unique card or if it will be reused once completed and, finally, set the approximate amount that each point is worth in sales – this will be used in the reporting to estimate the worth of each client.

Figure 2.A.1 – Add new cards



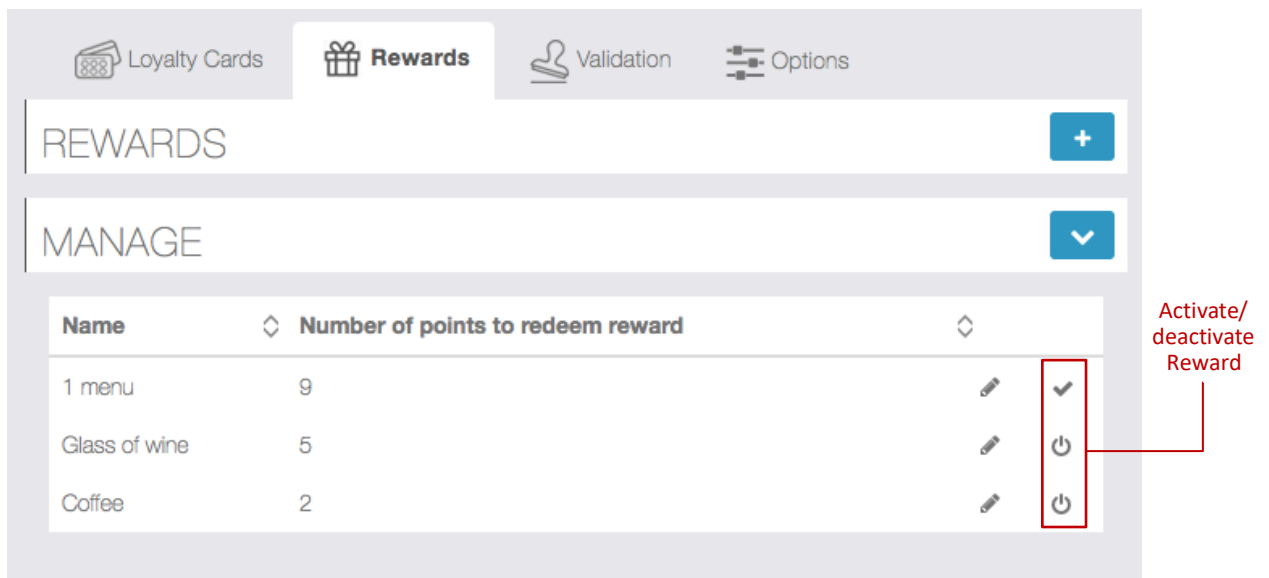
The screenshot shows the 'ADD NEW CARDS' form. At the top, there are four tabs: 'Loyalty Cards' (selected), 'Rewards', 'Validation', and 'Options'. Below the tabs is a header bar with the text 'ADD NEW CARDS'. The form contains the following fields and controls:

- A back button (<) on the top left and an 'OK' button on the top right.
- 'Card name \*': A text input field.
- 'Number of points \*': A text input field.
- '1 point \* (?)': A text input field.
- 'Use only once?': A checkbox.
- A 'Save' button at the bottom right.







## B. REWARDS

Once you've created the Loyalty Card, the second step is to create the Rewards (figure 2.B.1). Please note that any reward that you make active/inactive will be immediately active/inactive on the card.

Figure 2.B.1 – Rewards



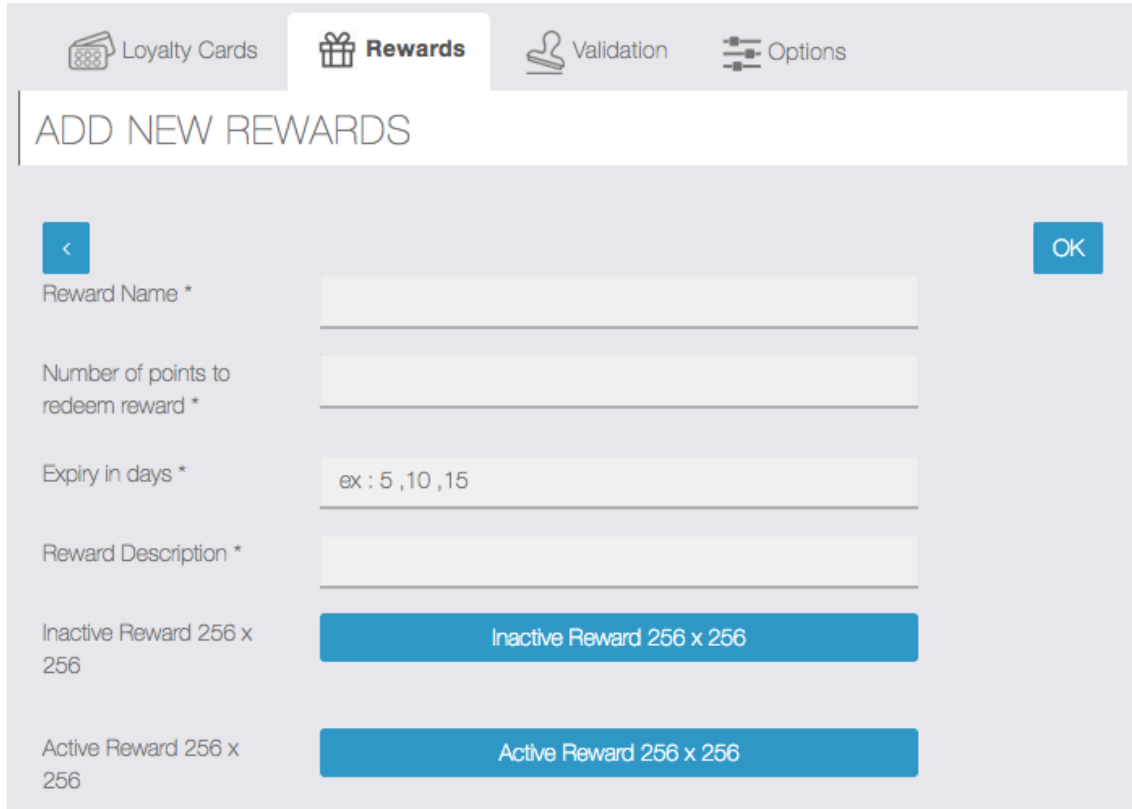
The screenshot shows the 'REWARDS' management interface. At the top, there are four tabs: 'Loyalty Cards', 'Rewards' (selected), 'Validation', and 'Options'. Below the tabs is a header bar with the text 'REWARDS' and a '+' button. Below that is a 'MANAGE' section with a dropdown arrow. The main content is a table with the following data:

Name	Number of points to redeem reward	
1 menu	9	 
Glass of wine	5	 
Coffee	2	 

A red box highlights the status icons (checkmark and power) for each reward. A red arrow points from the text 'Activate/deactivate Reward' to the power icon for the 'Glass of wine' reward.

You can create a Reward by clicking on the plus sign (figure 2.B.2). You'll need to define the reward name and enter a description – both these fields will be visible to the user –, set how many points are needed to redeem this reward and you can upload specific images for it. The Inactive Reward image will appear when the user still doesn't have enough points to redeem it. Once the user has enough points to redeem a reward, the Active Reward image will be shown. Similarly, the Redeem button on the app for this reward will change color. If you don't place any images here, the default ones that are uploaded under the Options tab will be used.

Figure 2.B.2 – Adding a new reward



Please note that, once a reward is created, you'll need to activate it before it will be displayed on the card.

With release 1.1 we introduced the concept of expiration to the Rewards. Thus, when you create a reward, you can define that it will expire 30 days after it is earned by the user. This creates urgency so that the user comes back to the shop to redeem the reward and, hopefully, an additional purchase.

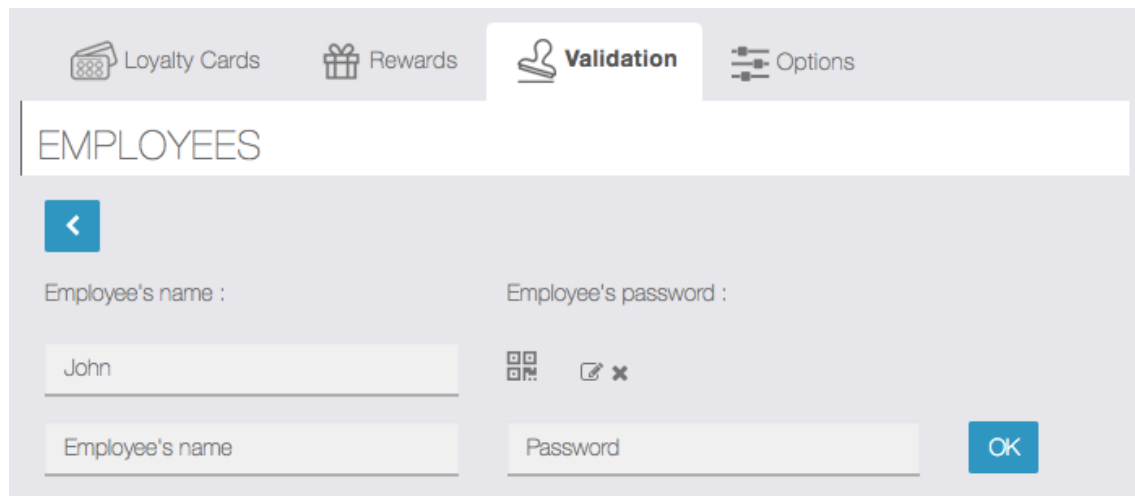
## C. VALIDATION

With the **Progressive Loyalty** module you'll be able to validate points remotely, you don't need to have physical access to the mobile phone to do it (figure 2.C.2). This is ideal for take-out

businesses or any type of phone ordering services. You can still validate points using the customer's mobile phone by creating employee pin-codes.

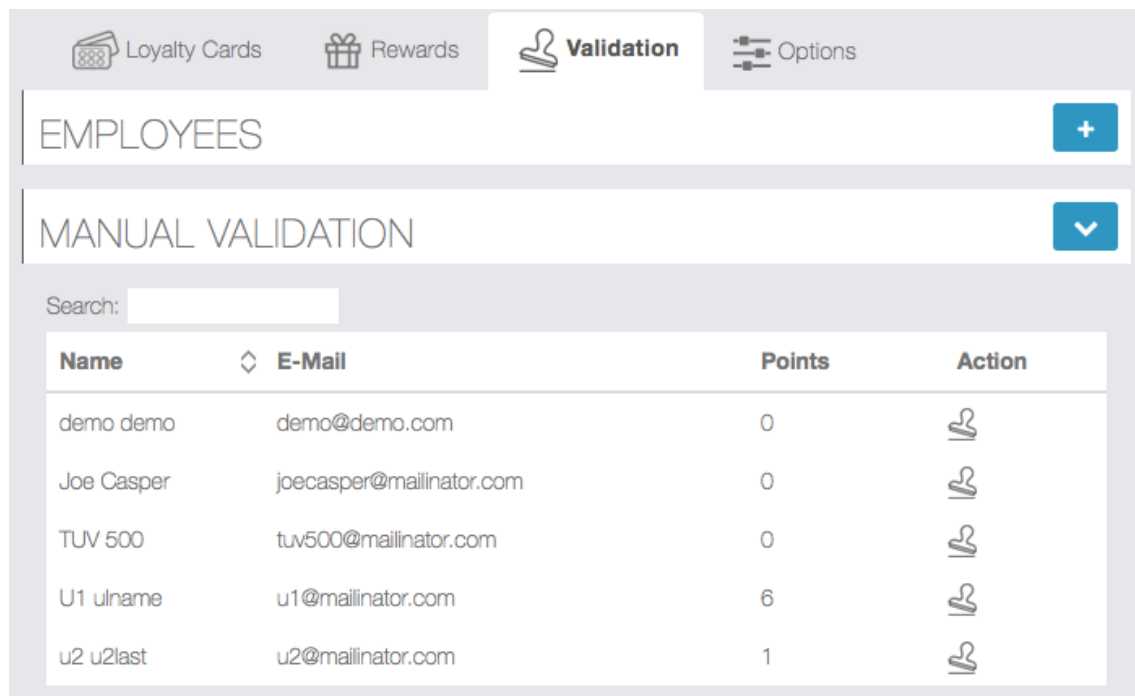
Once you access the module, an employee will be automatically created using your Siberian front-end user - please make sure you have filled out your user details (first and last names), otherwise the user will not be automatically created. This employee cannot be deleted but you'll need to define a 4-digit pin-code in order to validate the points on the card. Please note that, via the editor, you will not be able validate points remotely with another user's pin-code. You are free to add additional users to validate points on the App but, through the remote validation interface on the editor, only the logged-in user will be able to validate points with the created pin-code.






Figure 2.C.1 – Creating employees



The users show on the Manual Validation list are the ones who have signed up for this App. They'll be added to the module automatically as they sign-up.

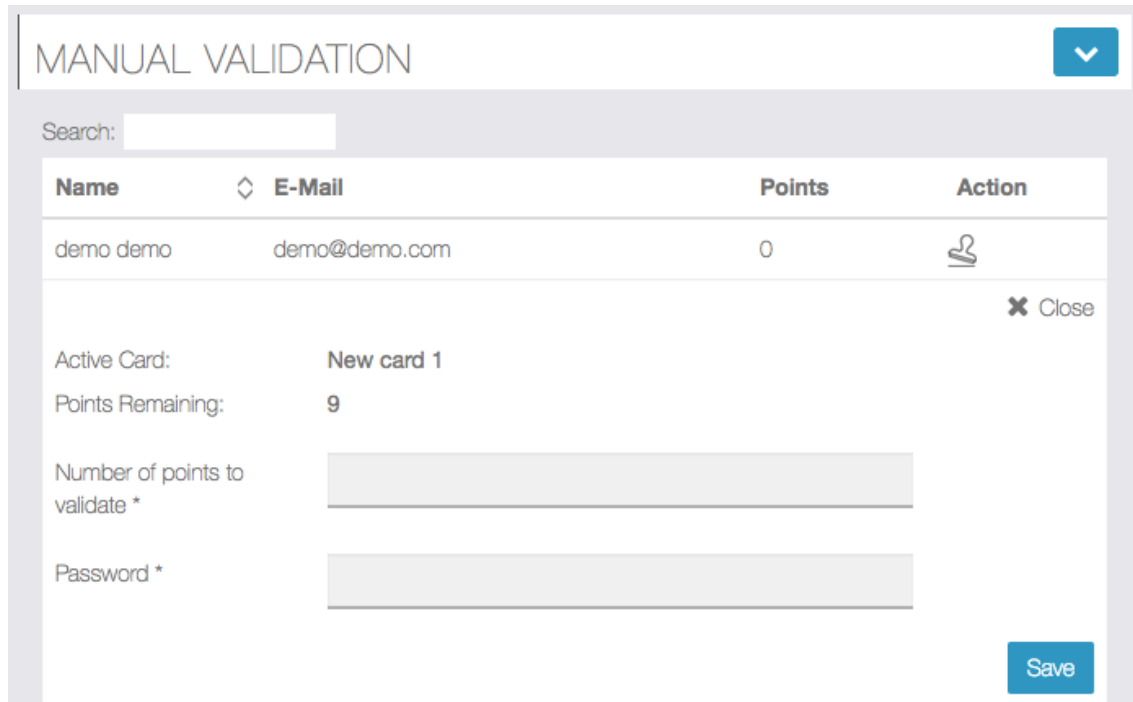
Figure 2.C.2 – Points validation



Name	E-Mail	Points	Action
demo demo	demo@demo.com	0	
Joe Casper	joecasper@mailinator.com	0	
TUV 500	tuv500@mailinator.com	0	
U1 ulname	u1@mailinator.com	6	
u2 u2last	u2@mailinator.com	1	


To validate the points via the backoffice, you'll need to select the user and click on stamp icon (figure 2.C.1 and 2.C.2). You'll need to set the number of points that you'd like to validate and enter the 4 digit pin-code that you've set.


Figure 2.C.2 – Validating points from backoffice



MANUAL VALIDATION

Search:

Name	E-Mail	Points	Action
demo demo	demo@demo.com	0	

 Close

Active Card: **New card 1**

Points Remaining: **9**

Number of points to validate \*

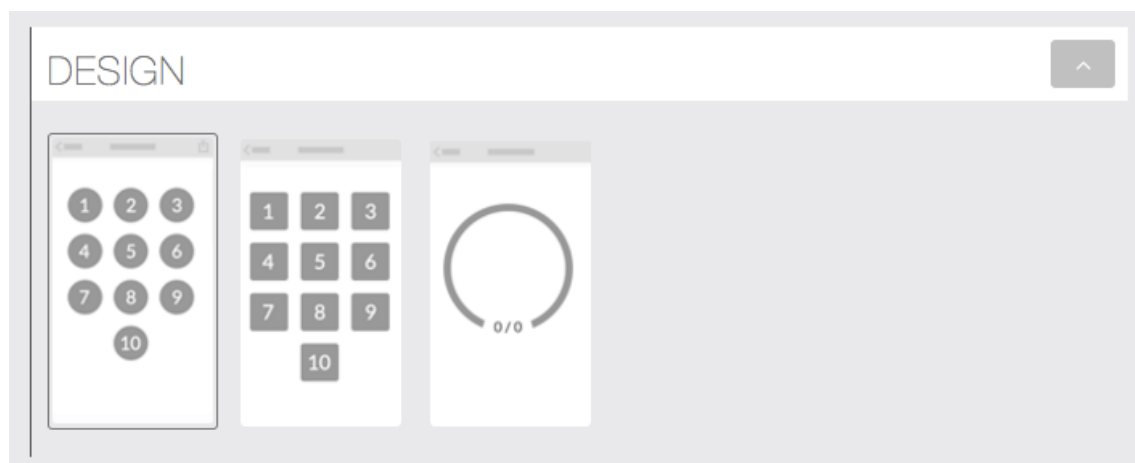
Password \*

Save

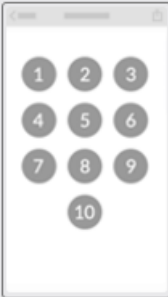
## D. DESIGN


Once the card and rewards are setup, you can decide which layout to apply to your loyalty card (figure 2.D.1) – these are optional but will allow you to customize your loyalty card to your design needs.

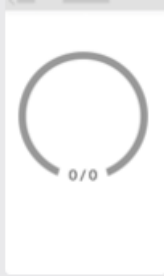
Figure 2.D.1 – Selecting the loyalty card layout



DESIGN





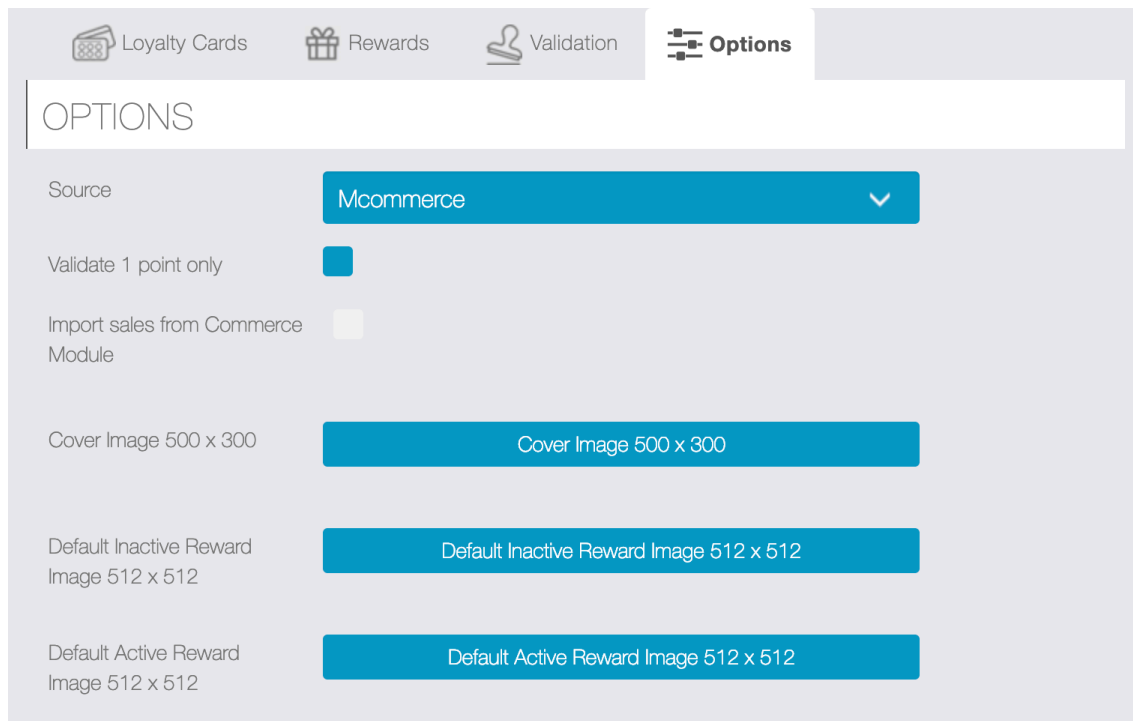


## E. OPTIONS

The last step is to set default options (figure 2.E.1) – these are optional but will allow you to customize your loyalty card to your design needs. Additionally, you'll be able to control if employees are able to validate 1 or more points at a time. If “validate 1 point only” is not selected, the employee at the store will be able to validate several points through the App at once.

With release 1.2 we added compatibility with Siberian's default Mcommerce feature and with MobilCart modules. On the source selection box, you'll be able to define if you want to import sales from Mcommerce or from MobilCart. When the “import sales from Commerce module” box is selected, you'll be able to define a conversion rule for the sales that are done. You should define a rule with the lowest amount of sales you want to convert into points. Only full integer points will be converted, no decimals are calculated for points. This means that, if the rule is to convert 1 point for each 10€ in sales, then on an order of 11€, the user will get 1 point. The same if the order is for 19€. The points conversion only occurs once an hour whenever the order status is marked to “Done”.

Figure 2.E.1 – Options



Loyalty Cards	Rewards	Validation	<b>Options</b>
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### OPTIONS

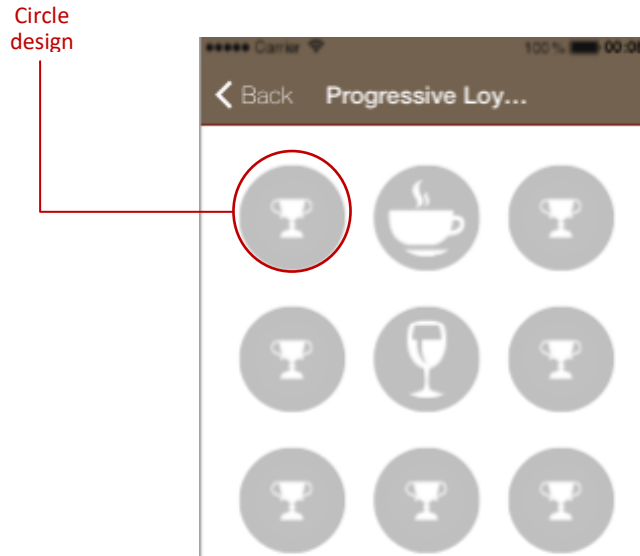
Source	Mcommerce
Validate 1 point only	<input checked="" type="checkbox"/>
Import sales from Commerce Module	<input type="checkbox"/>
Cover Image 500 x 300	Cover Image 500 x 300
Default Inactive Reward Image 512 x 512	Default Inactive Reward Image 512 x 512
Default Active Reward Image 512 x 512	Default Active Reward Image 512 x 512

## F. COLORS

You can set the color on the **Progressive Loyalty** module by changing the Card and Button colors on the Siberian Colors tab. Additionally, if you want to change the points default background color, you can do it using the following advanced SCSS code:

```
img.square{background-color: #EBB19E;} – for square points design  
img.circle{background-color: #EBB19E;} – for circle points design
```

Figure 2.F.1 –Setting the inactive point background color



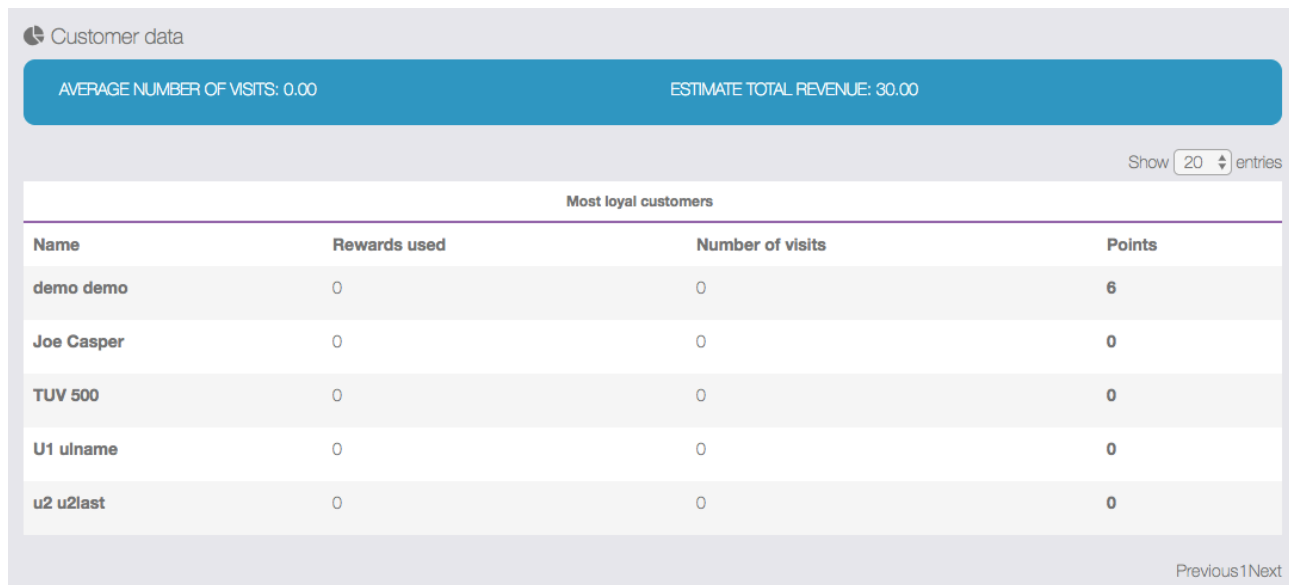
## 3. REPORTING

The analytics of this module have been created to help businesses identify their most loyal customer and cater to them (figures 3.1 and 3.2).

On the customer data dashboard, you'll be able to get the number of rewards used per each customer, the number of points that were validated and the number of visits that have been made by this customer to the store. Please note that we're making an assumption that each point validated was the result of a visit to the store. However, if points are validated several times within a 2-hour period, we will only count 1 visit. The total revenue is calculated using the estimate value for 1 point when set when creating the card and multiplying it by the number of points validated.

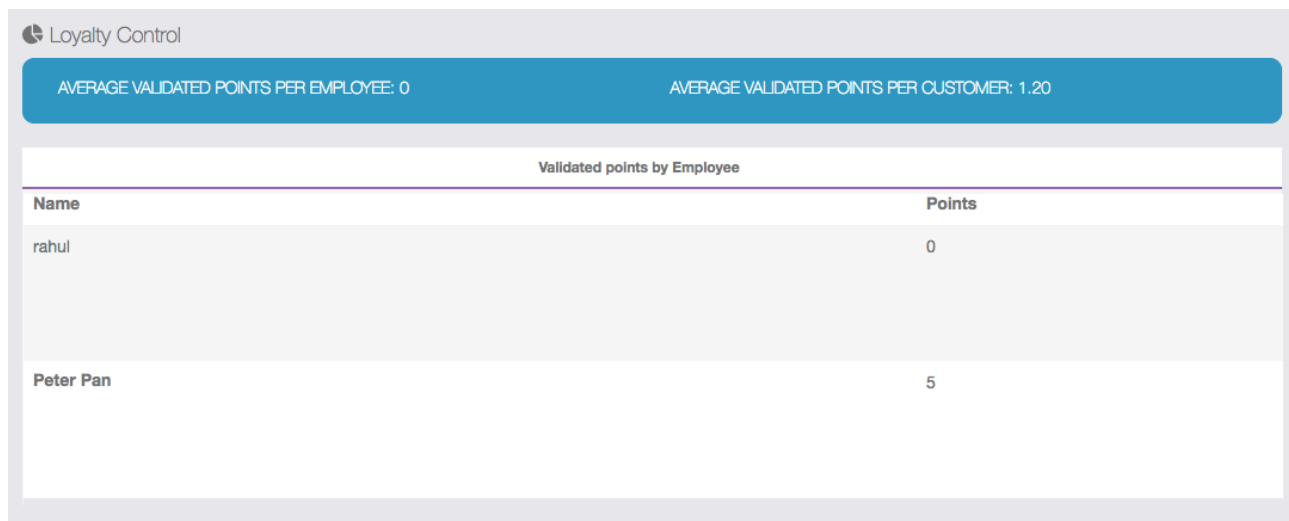


Figure 3.1 – Customer data dashboard



Loyalty control dashboard allows you to check how many points the employees are validating and what is the average for all employees. This will allow you to spot deviations from the average to quickly investigate suspicious cases.

Figure 3.1 – Loyalty control dashboard



Both the Customer and Loyalty Control Dashboards (figures 3.1 and 3.2) allow you to drill down to a more detailed report to show you individual customer or employee activity. Just click on the customer or employee name to obtain more detailed information.

## 4. USER FRONTEND INTERFACE

Below you can find the user frontend interface screens.

