StickyFeet
User Guide

Client Tool Box

Contents

Contents

StickyFeet Introduction

Worlds Largest

Established in 2001, IQ Gecko (a division of IQ Information Technology) was born as an IT Solutions company.

Taking our EFTPOS-to-POS technical expertise and enthusiasm, IQ Gecko worked with the Jotti group in both designing and selling a bespoke loyalty platform specifically for Gloria Jeans Coffees.

Driven by the company goal for continual improvements, IQ Gecko acquired the Australasian rights for the an international customer engagement platform known locally as StickyFeet.

Most people do not realise just how big the StickyFeet footprint has become as this same StickyFeet platform is unknown, but everywhere across the globe.

Our Platform Partners are around the globe and the same StickyFeet platform is used by Merchants in over 65 Countries and in Dozen of Languages making the StickyFeet platform the worlds largest Loyalty Platform.

The reason for the incredible take-up is that StickyFeet is an easy to use monthly subscription Internet platform that can grow for merchants, franchise groups and businesses of all shapes and sizes.

Just some of the local Australian and New Zealand StickyFeet platform clientele includes the likes of Suncorp Bank, Harley-Davidson Motorcycles, Toys"R"Us Australia, Health Information Pharmacy Group and Best Western Hotels Australasia.

The benefits of our platform are that you know exactly who your loyal customers are. You have their contact details - and they have requested that you keep them informed of your company's promotions, specials and new and exciting features.

An "engaged" customer with a loyalty card gives you more than six times the sales than a customer with only a loyalty card alone.

According to their 2009 Prospectus, loyalty card members made up only 3.4% of Myer sales, but when the growing amount loyalty card members were pro-actively engaged their percentage of Myer sales increased to 22.1% by Myer's loyalty members.

With IQ Gecko's StickyFeet platform your growing customer base of loyalty members are "engaged" via direct communication from the merchant.

Communications such as automated emails after purchase which update the loyalty customer with their points status as well as a personal message.

This same StickyFeet platform means that the money-making features used by multinationals are available for any merchant @ a price that equates to less than a cup of coffee a day.

Getting Started

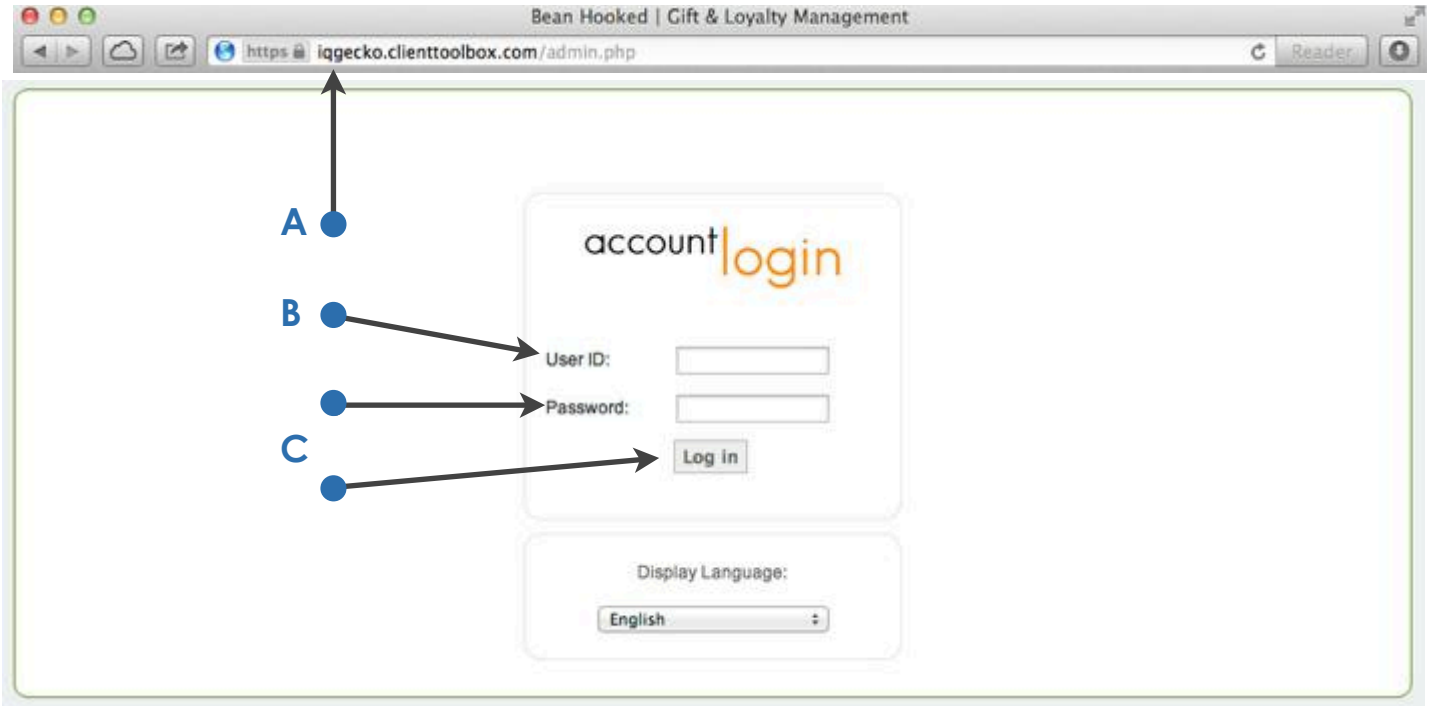
Logging In

A go to URL: https://iqgecko.clienttoolbox.com

B in the User ID box, enter in the User ID supplied to you

C in the Password box, enter in the Password supplied to you

press the "Log In" button



Getting Started

Account Information

A on the front of the Admin page - click on "Edit"

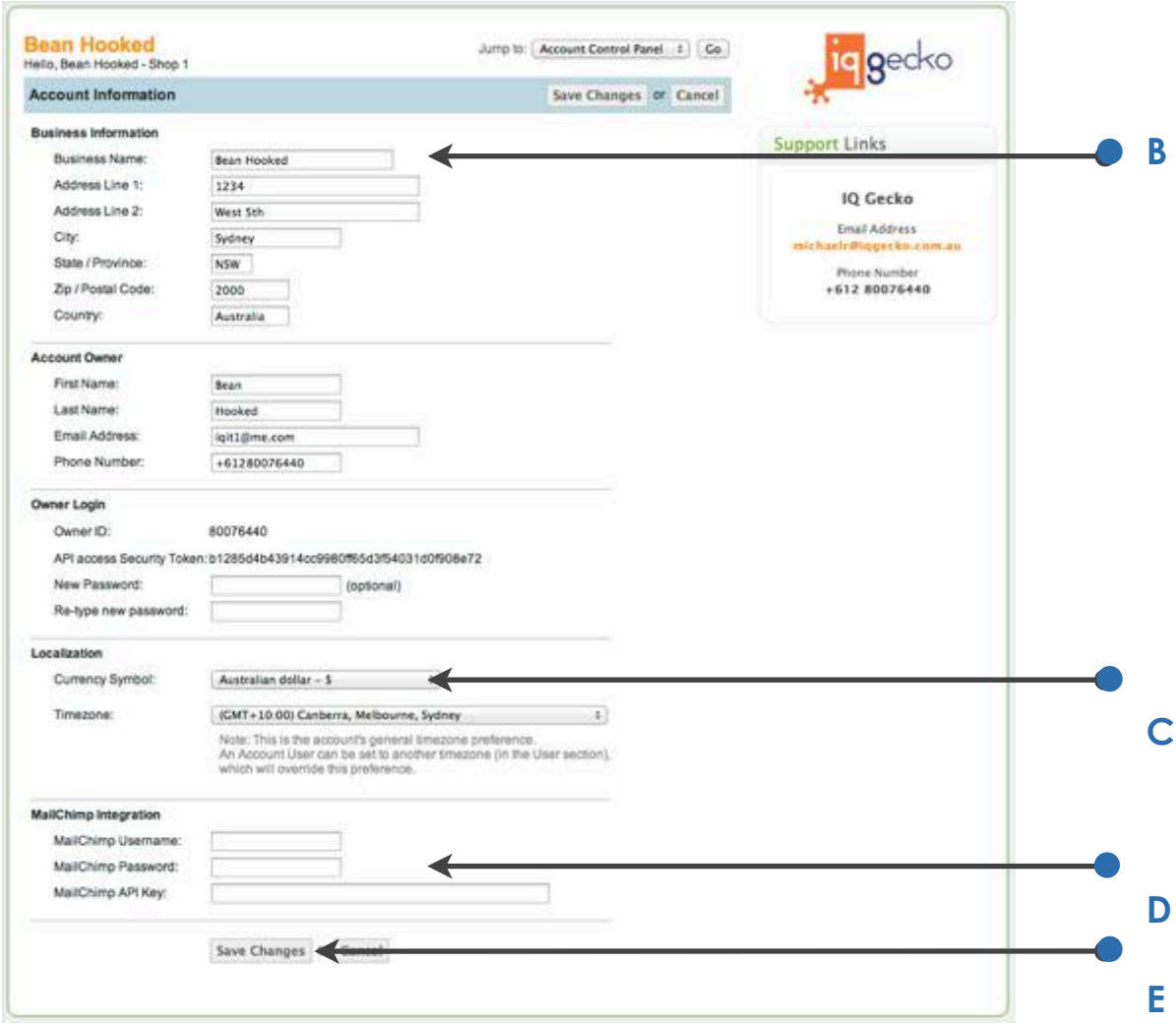
B ensure your Account Information data is accurate

ensure your Location and Time Zone is accurate

C add your MailChimp credentials

D save your changes

E



Add a New Campaign

Points Program

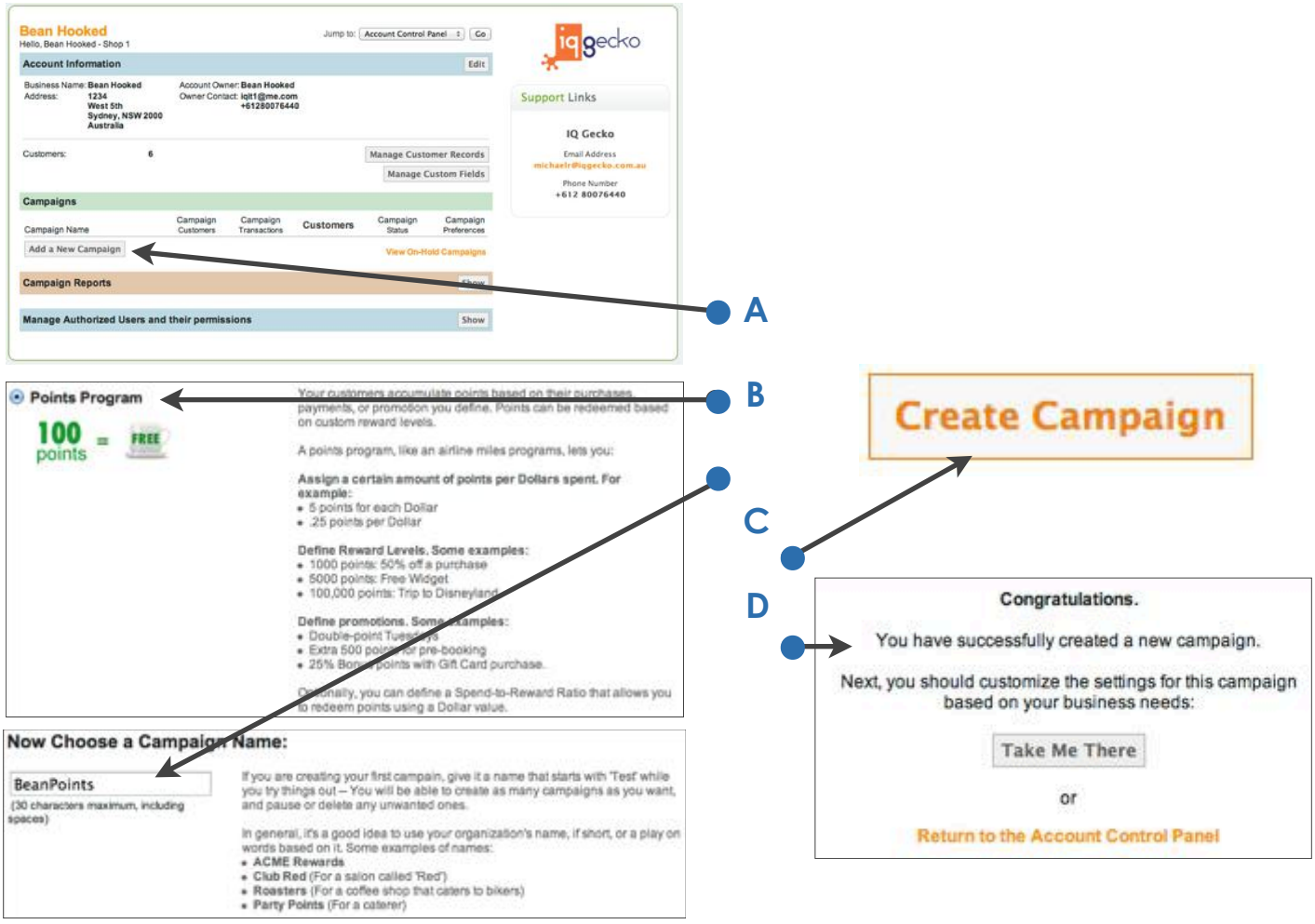
A click onto Add New Campaign

B select your Campaign Type (Points Program)

C scroll to the bottom of the page and name your Campaign

D press the "Create Campaign" button

start customising your loyalty program by clicking on the "Take Me There" button



Add a New Campaign

Points customisation

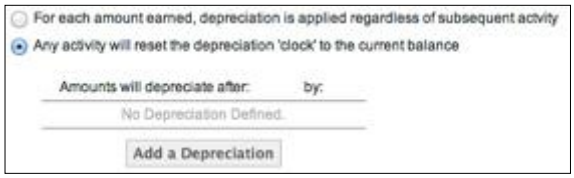
Ratio: Points-per-Dollar

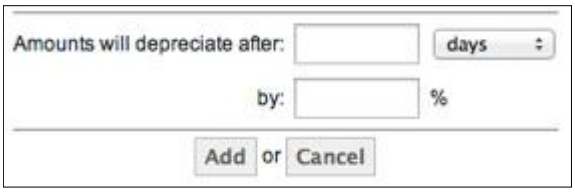
Points earned for every Dollar spent.

Choose your preferred Points-Per-Dollar ratio amounts and press "Set" to save.

Note: You can change this ratio can be at anytime - but customers' existing accumulated points will not change.

Depreciation





If you wish to depreciate points - you can choose to have points depreciated for all member - or just for members that are not "Active" or not.

If you choose to depreciate points - you can also choose the the amount to be depreciated after X-days and/or the % of points to be depreciated.

Note: IQ Gecko believes that Best Practice is to depreciate points from "In-Active" members (not back in 12 to 24 months) as Points are a Liability to Merchant.

Recurring Fee

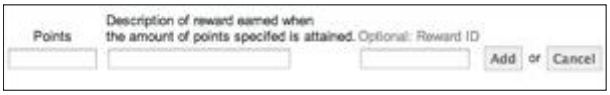
Recurring Fees assists the Merchant in reducing Points Liability.

Recurring Fees are most commonly used by Franchise Head Offices to used to "support" (meaning fund) part or all of the marketing platform running costs.

Add a New Campaign

Points customisation (continued)

Reward Levels



Choose the amount of Points required to receive a specific product.

Note: If you set "100" points for a "Cup of Coffee" then if you are using the IQ Gecko "LoyaltyPad" portal when the customer receives a loyalty "Cup of Coffee" then "100" Points will automatically be deducted from the customer's points.

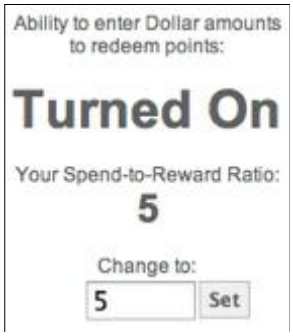
Promotions

Promotions modify the way points are earned.

You can have promotions add or subtract a specific amount of points, or multiply by a certain amount, when a transaction is recorded

Note:
"**+**" Promotions will be able to be recorded by themselves: just select the promotion and click on "Record".
"**x**" Promotions will not be able to be recorded by themselves: A purchase amount will be required.

Dollars to Redeem Points



You can turn on the ability to redeem points by entering a Dollar value.

The Spend-to-Reward Ratio is one of two ratios that you had to use to figure out the points value of your rewards.

So when you enter this Spend-to-Reward Ratio above, the program can automatically figure out how much those points are worth. There's no need for you or your cashiers to remember complicated rewards tables, or whip out a calculator.

Add a New Campaign

Points customisation (continued)

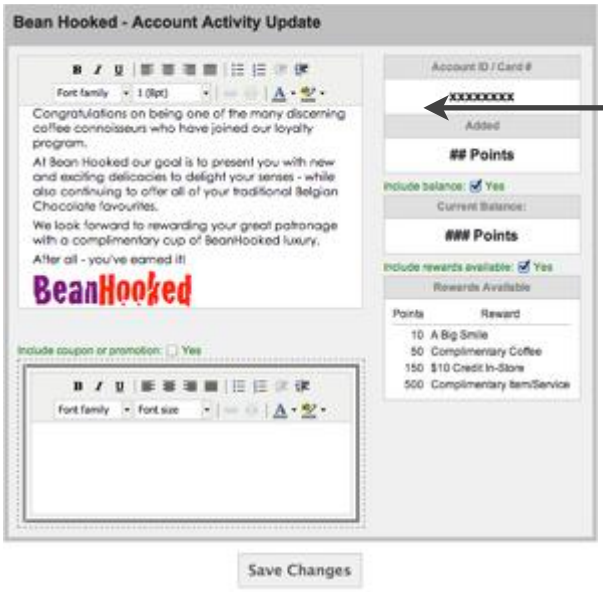
Transactional Email Nothing says "Thank-you" quite like, well, saying "Thank-you". Nothing says "Thank-you" quite like, well, saying "Thank-you".

Auto-emailing a thank-you greeting and points status after a purchase is very powerful because it reinforces the merchant's relationship - while even featuring any product or promotion you may want to highlight.

By continuing past being "In-Shop" to now also being invited "In-Home" you are increasing your customer relationship and rapport.

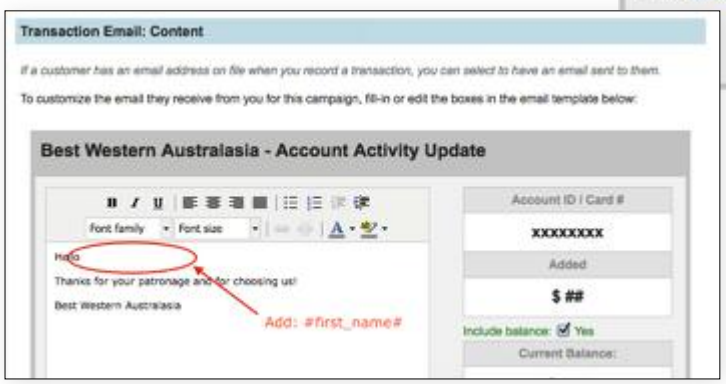
Note 1: We have found that the best way to ensure your preferred colour and font format is to design your text layout on another word-processing software (MS Word, Apple Pages, etc) and then simply copy and paste the text.

Note 2: This feature is available while doing loyalty purchase transactions within the Client Tool Box, LoyaltyPad and via the POS-interfaced SaleGrabber module.



Sample of a designed Transactional Email message within the Client Tool Box.

Sample of a email message as received by the loyalty member.



To add a "First Name" personalisation to your email simply add "#first_name#" to the content of your email.

Add a New Campaign

Buy X (get one free)

A click onto Add New Campaign

B select your Campaign Type (Points Program)

C scroll to the bottom of the page and name your Campaign

D press the "Create Campaign" button

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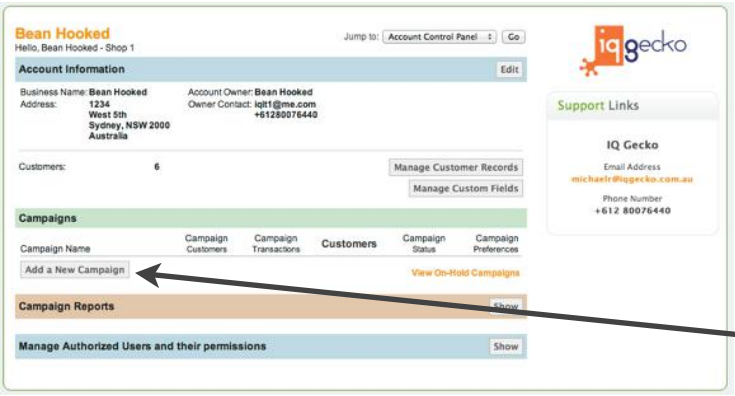
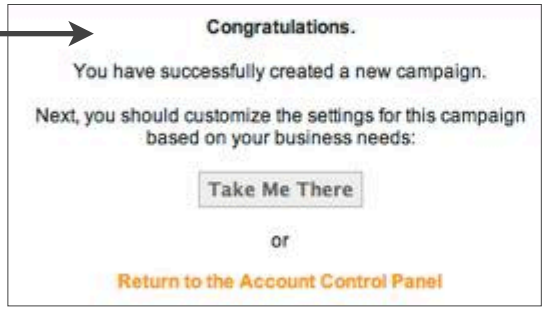


A

B

C

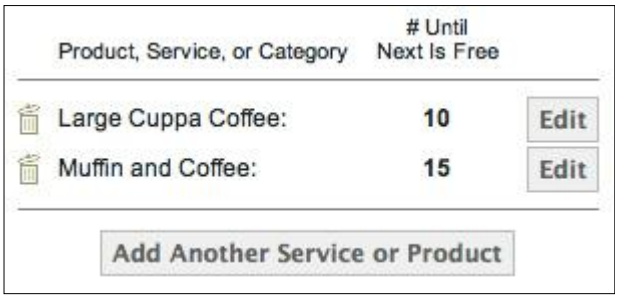
D



Add a New Campaign

Buy X customisation

Buy X Get One Free Promotion

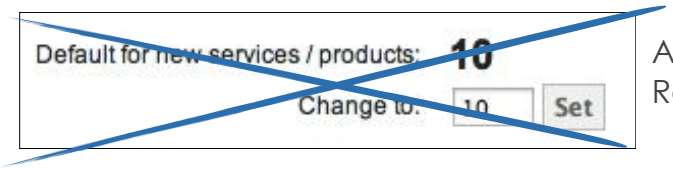


Add a Service or Product.

Click on "Add a Service or Product" and simply decide what to name your complimentary product along with the amount of previous X-purchases are required to receive the good(s).

Note 2: You can add multiple
Note 2: You can change this ratio can be at anytime.

Default number of services or products until the next one is free



As you have set your own Service and Product Reward(s) above - this section is not required.

Add a New Campaign

Buy X customisation (continued)

Transactional Email

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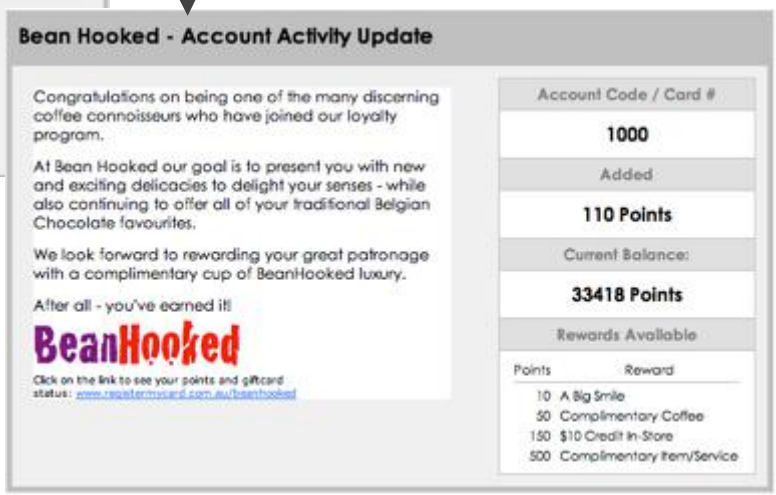


Add a New Campaign

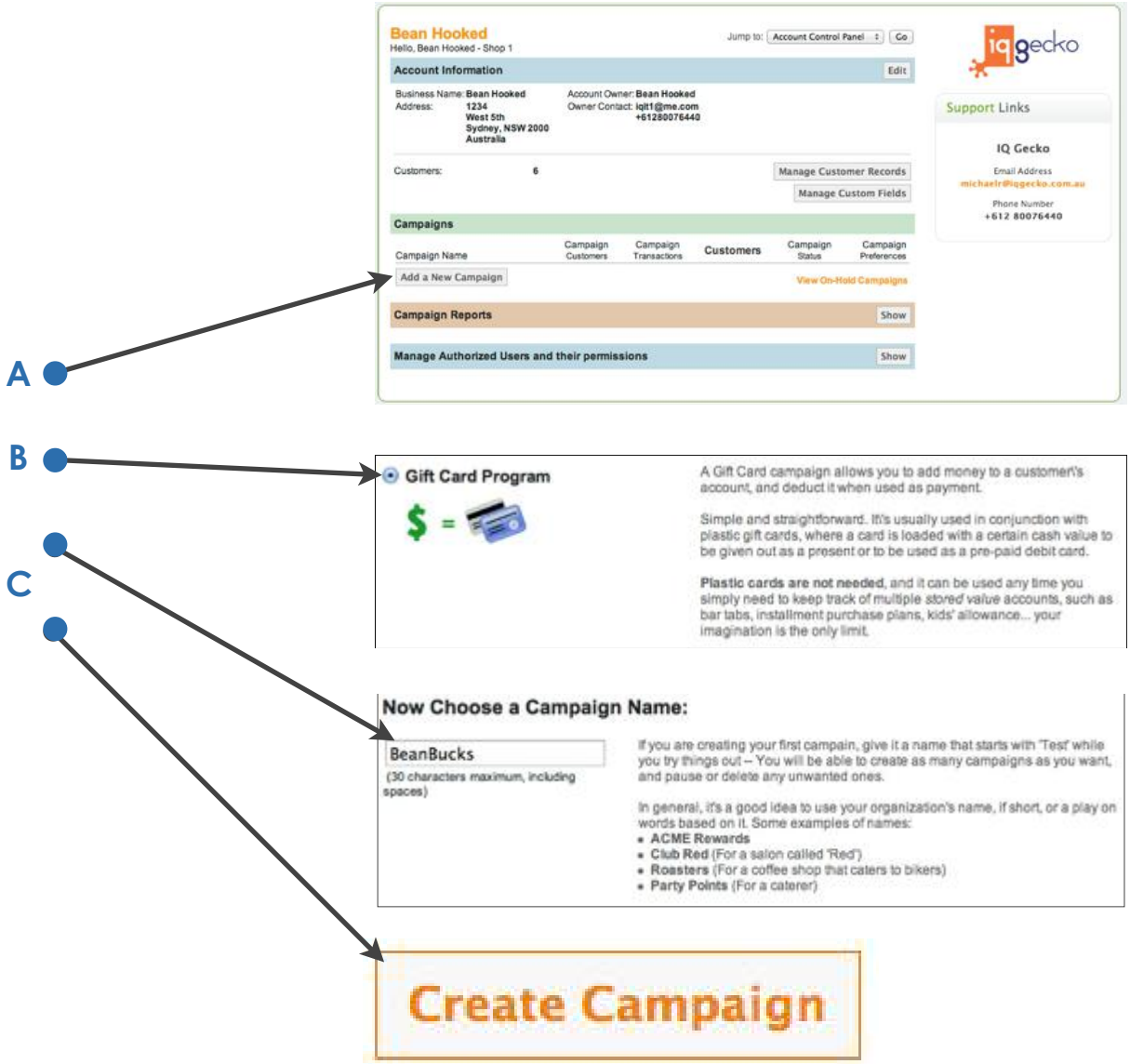
Gift Card

A click onto Add New Campaign

B select your Campaign Type (Gift Card Program)

C scroll to the bottom of the page and name your Campaign

press the "Create Campaign" button

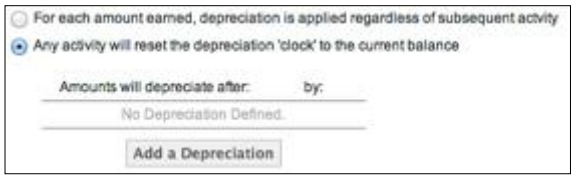


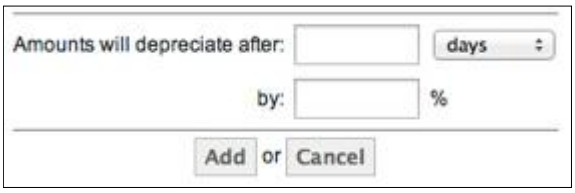
Add a New Campaign

Gift Card customisation

Start customising your loyalty program by clicking on the "Edit" button

Depreciation





If you choose to depreciate Gift Card value you can also choose the the amount to be depreciated after X-days and/or the % of points to be depreciated.

Note: IQ Gecko believes that Best Practice is to depreciate or delete Gift Card funds after 12 to 24 months as Gift Card Funds are a Liability to Merchant.

Recurring Fee

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Add a New Campaign

Gift Card customisation (continued)

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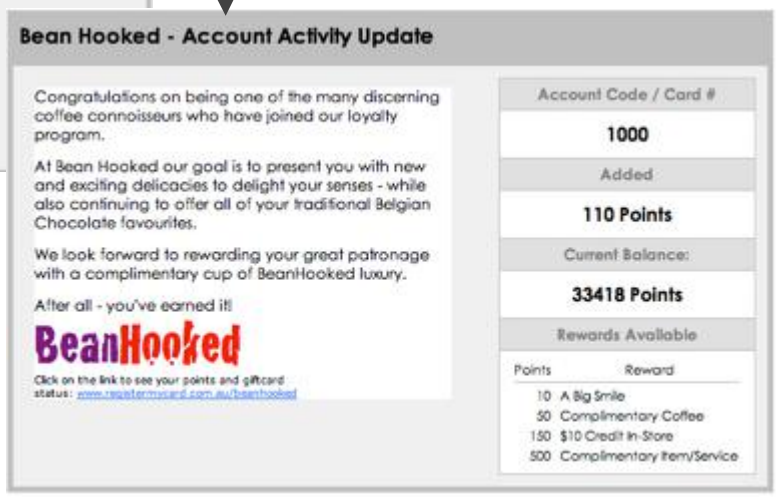


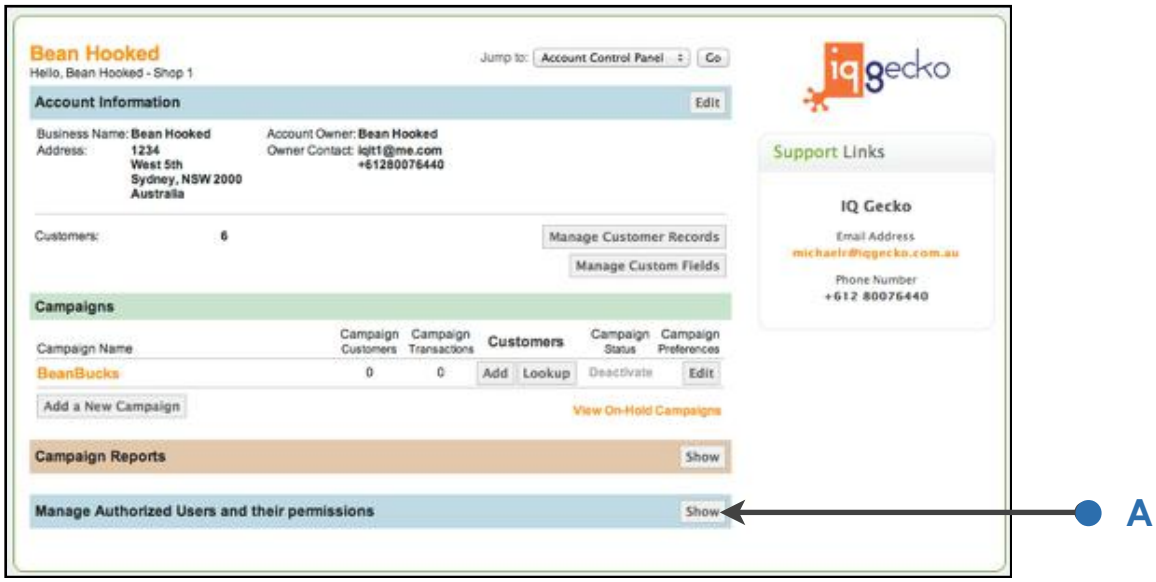
Manage and Authorise

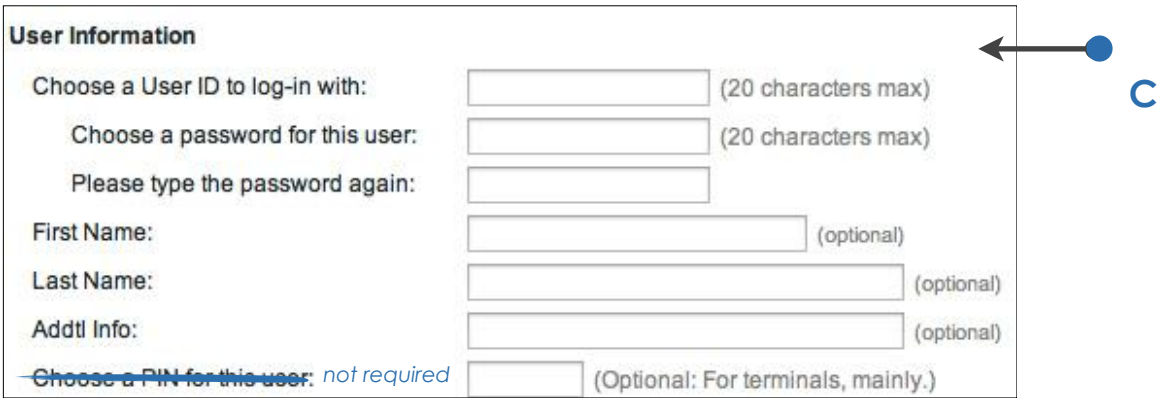
Permissions and Users

A start by clicking on the "Show" button

B Click on "Add a New User"

Fill in the User information fields Note: Do not fill in the PIN field as it is not required





Manage and Authorise

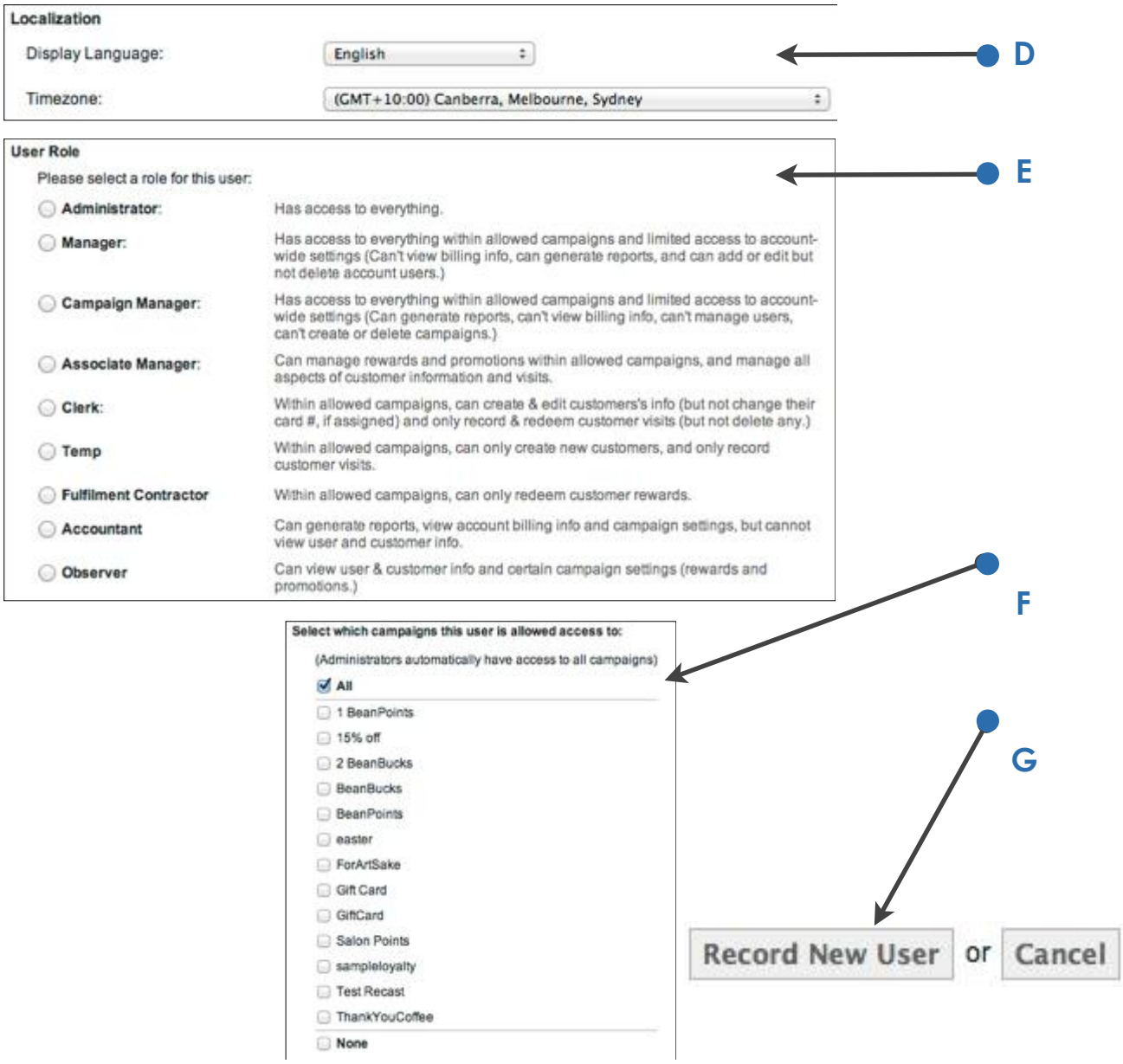
Permissions and Users (continued)

D Select your preferred language and time-zone

E Select the preferred User Role Note: 9 choices ranging from Admin to Observer

F Select which Campaigns this user is allowed to access
Note: All Campaigns are displayed - even the ones that may currently be Deactivated

G Click on "Record New User"



Add a Customer

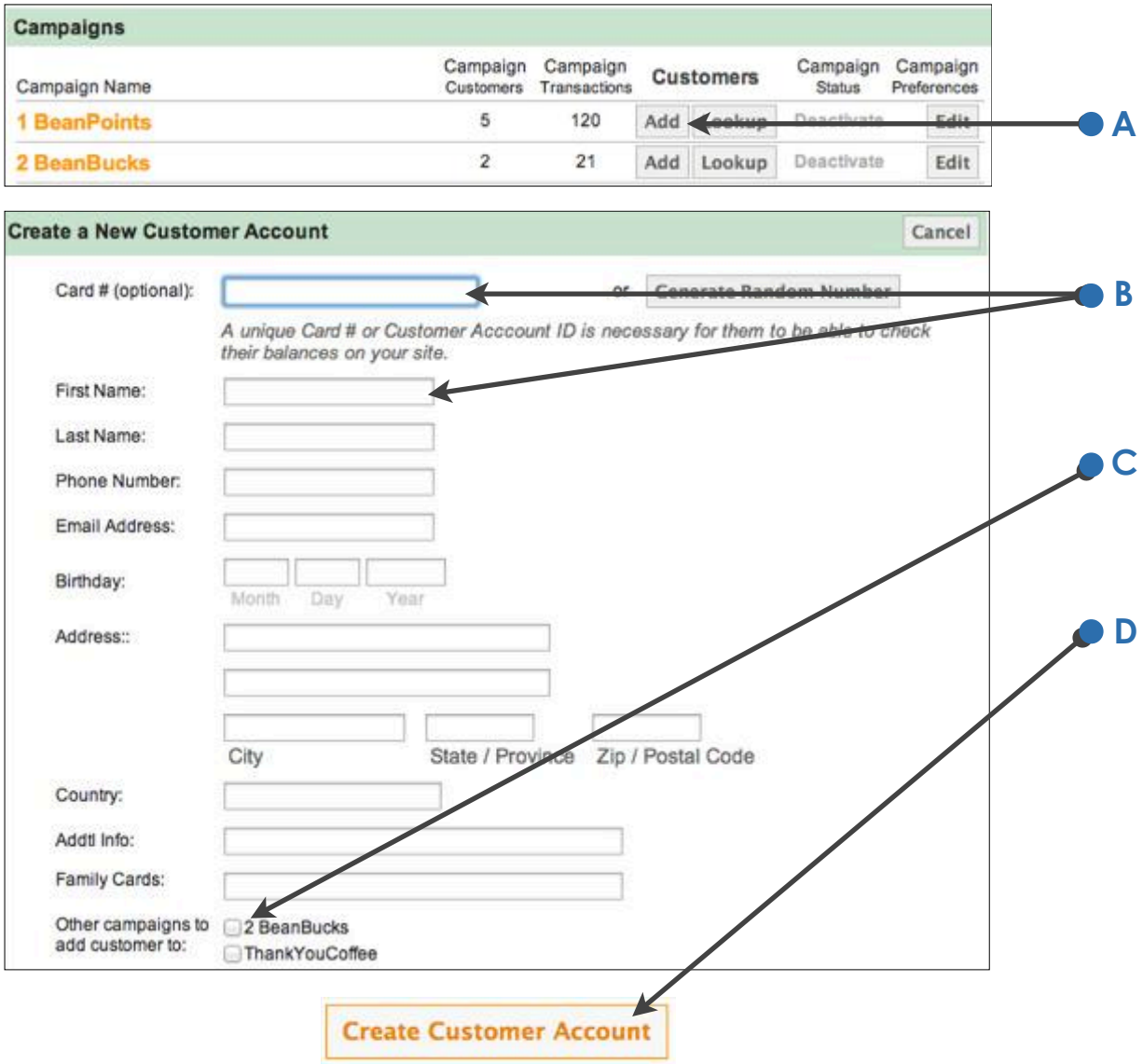
Add a Customer to a Campaign

A start by clicking on the "Add" button

B type in the Card Number and Customer details

C you may also Add the Customer to any/all other Campaigns

D click on "Create Customer Account"



Lookup a Customer

Lookup & transact a Customer

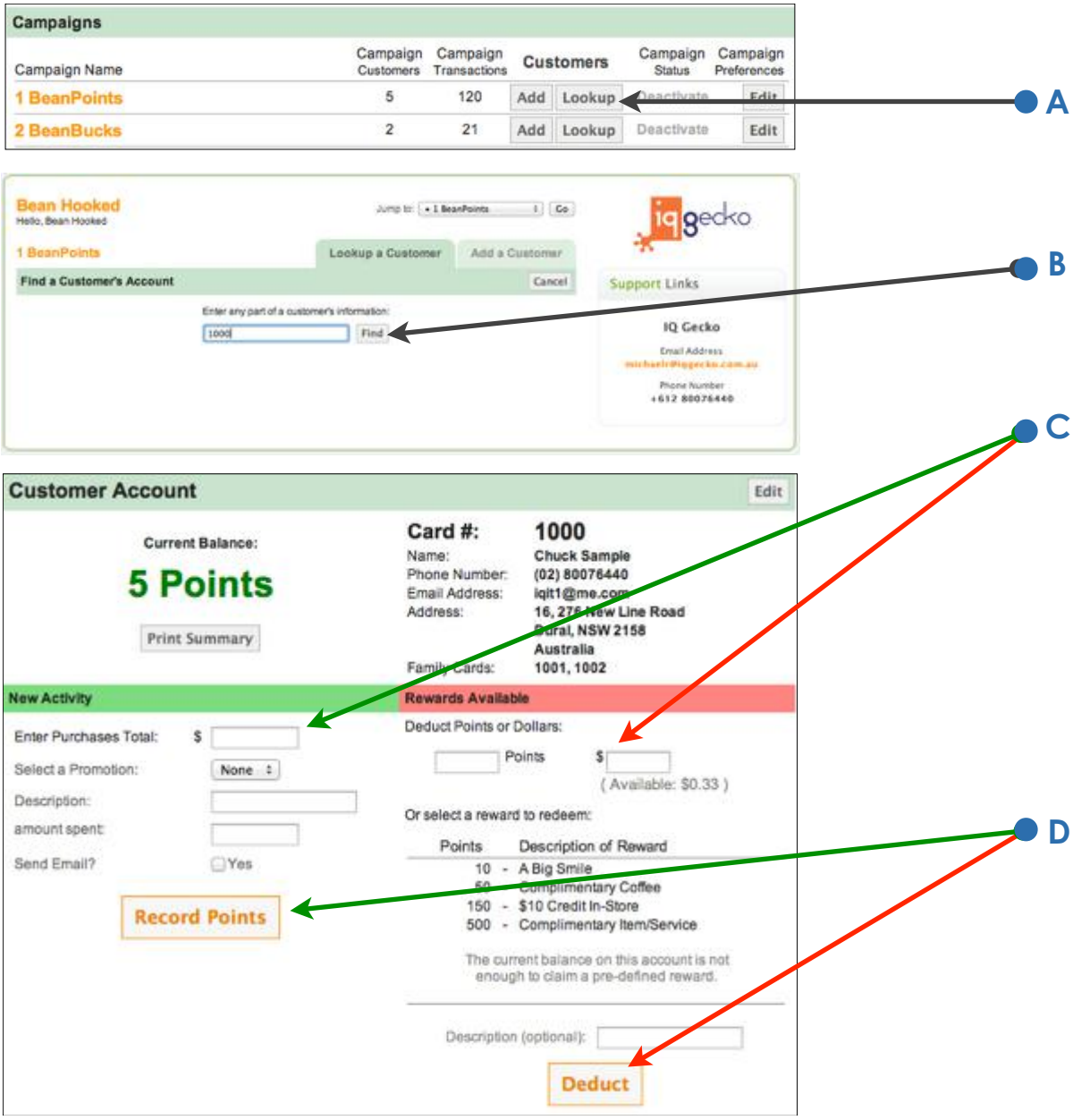
Note:
After looking up a Customer the Merchant can press **Edit** to make any adjustments.
Change Address, Details, etc.

A start by clicking on the "Lookup" button

B type or scan in the Card Number and press "Find"

C add or deduct the applicable amount

D click on the appropriate "Record Points" or "Deduct" button



Reporting

Transactions Audit

"Everything In A Nutshell".

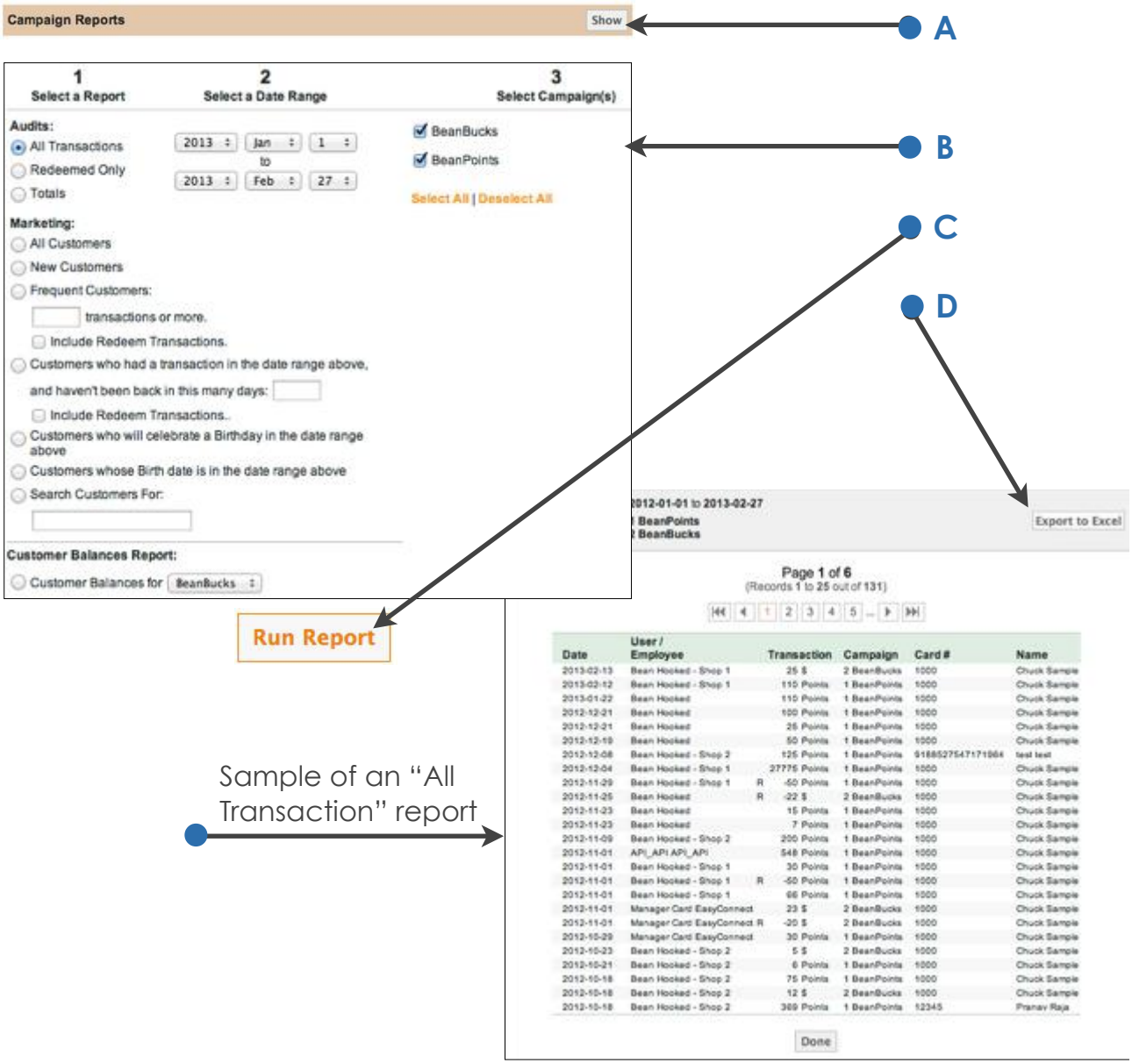
In case you want to review what's been happening during a certain period, or to generate your own backups of your store's activity

A start by clicking on the "Show" button

B select "All Transactions" along with your preferred Date Range and Campaigns

C click on "Run Report" to view data

"Export to Excel" to extrapolate the Report data



Sample of an "All Transaction" report

Reporting

Redeemed Audit

Shows a list of only "Redeemed" transactions.

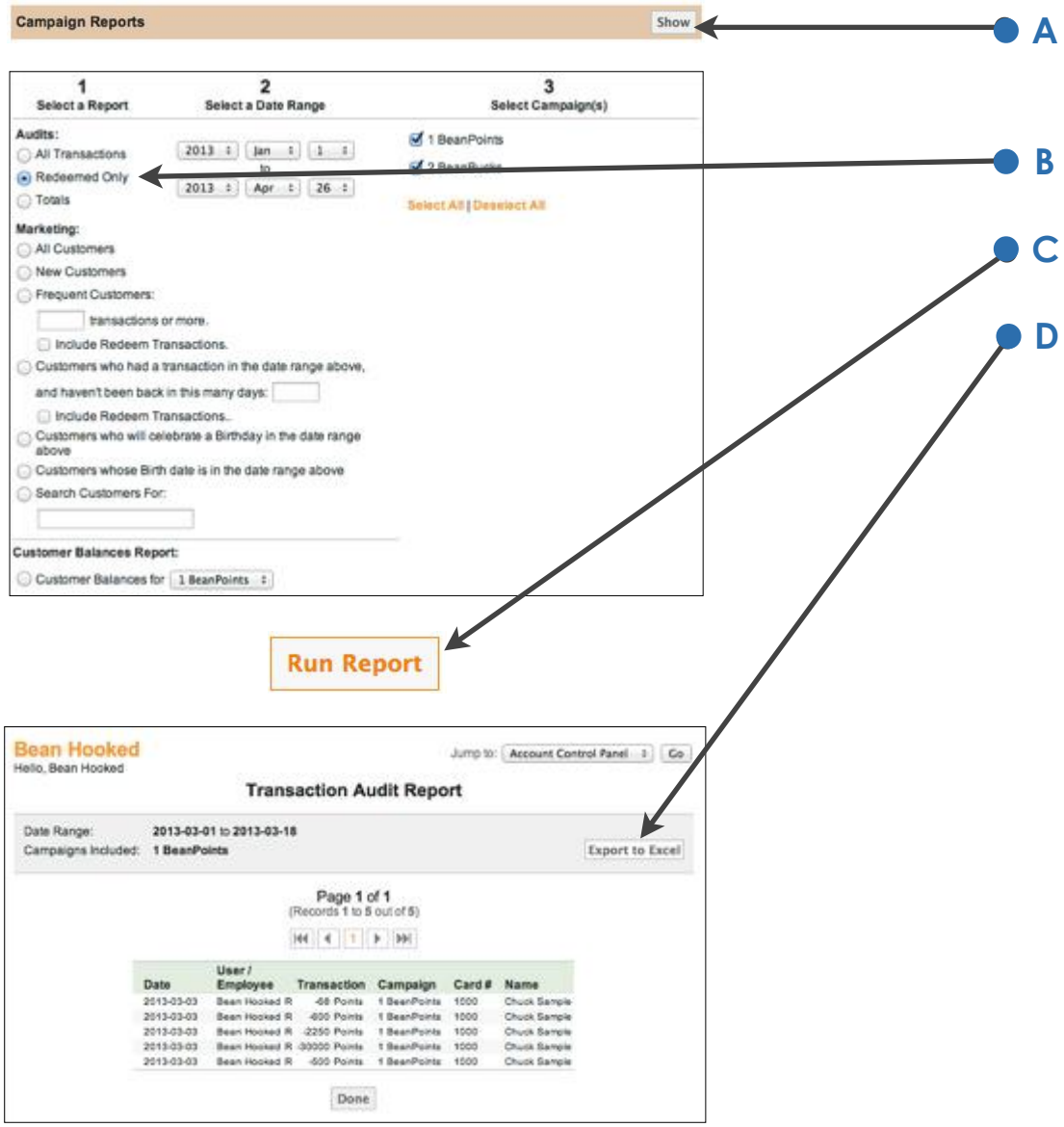
In most cases, Rewards claimed

A start by clicking on the "Show" button

B select "Redeemed Only" along with your preferred Date Range and Campaigns

C click on "Run Report" to view data

"Export to Excel" to export data



Reporting

Liability / Totals Audit

See the current state of your campaigns, like how many points, or gift card balances, you have "out there".

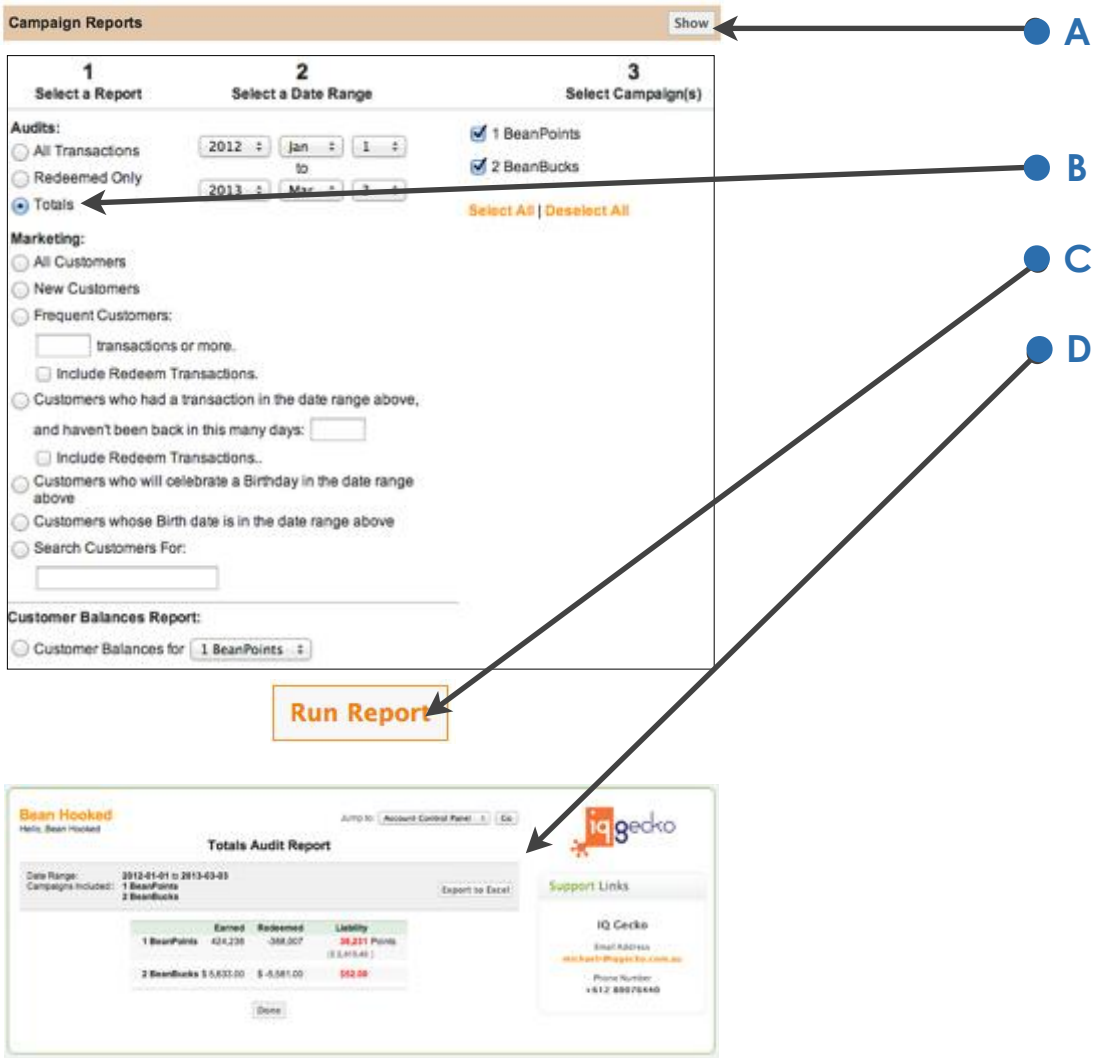
This one makes your accountant very happy (usually)

A start by clicking on the "Show" button

B select "Totals" along with your preferred Date Range and Campaigns

C click on "Run Report" to view data

"Export to Excel" to export data



Reporting

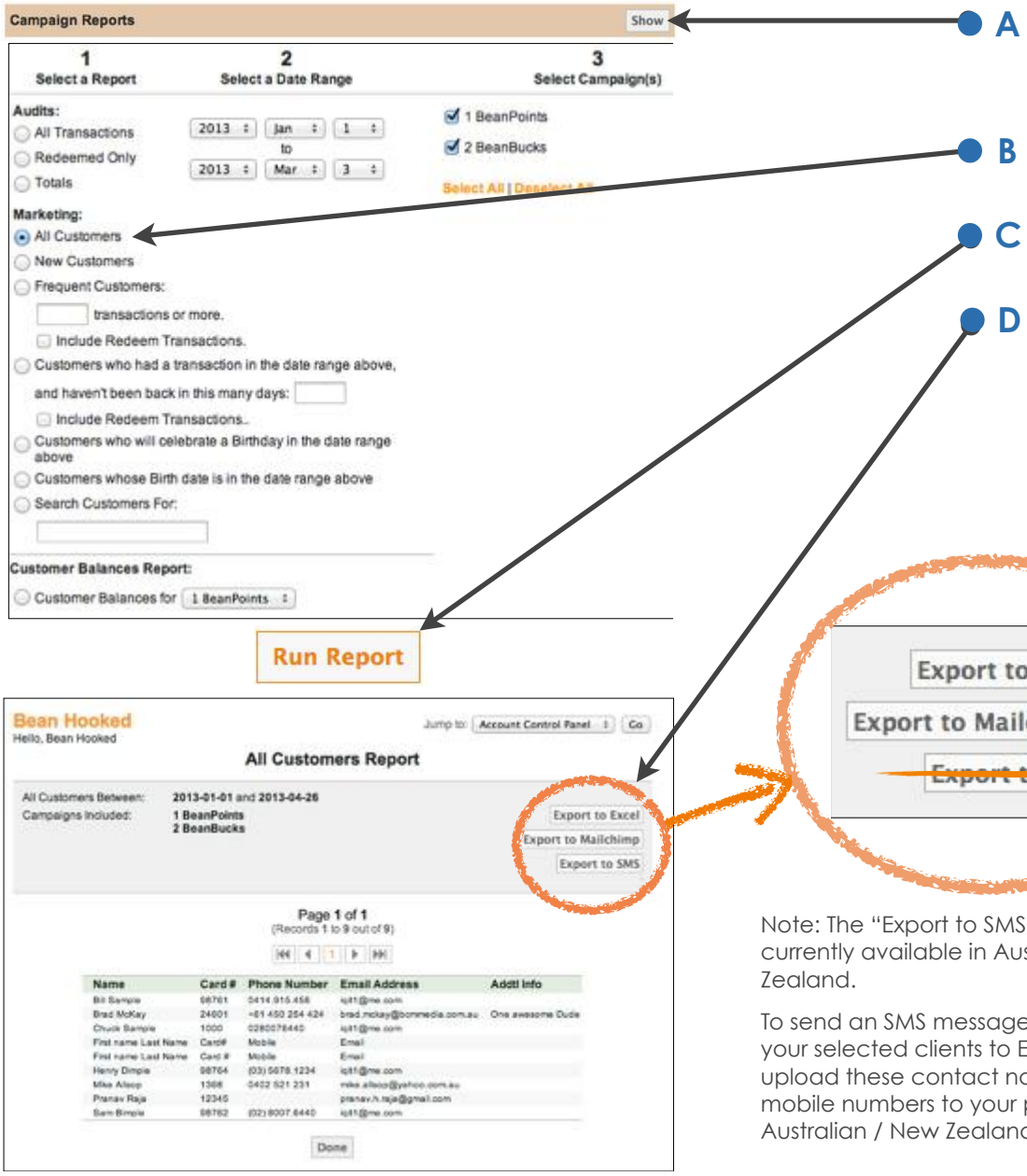
All Customers

A start by clicking on the "Show" button

B select "All Customers" along with your preferred Date Range and Campaigns

C click on "Run Report" to view data

"Export to Excel" to export data



Note: The "Export to SMS" feature is not currently available in Australia / New Zealand.

To send an SMS message, simply Export your selected clients to Excel and upload these contact names and mobile numbers to your preferred Australian / New Zealand SMS supplier.

Reporting

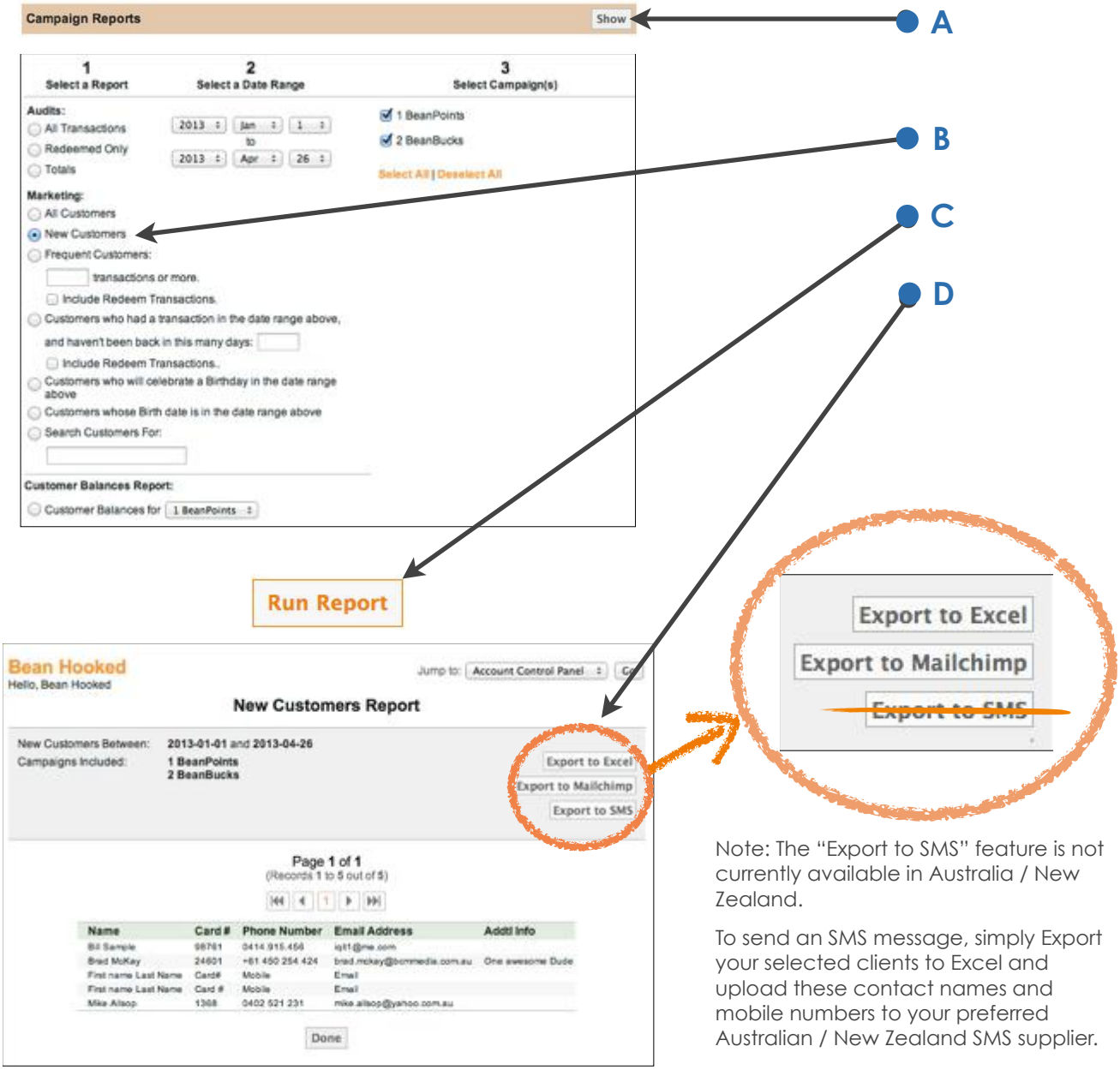
New Customers

A start by clicking on the "Show" button

B select "New Customers" along with your preferred Date Range and Campaigns

C click on "Run Report" to view data

"Export to Excel" to export data



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To send an SMS message, simply Export your selected clients to Excel and upload these contact names and mobile numbers to your preferred Australian / New Zealand SMS supplier.

Reporting

Frequent Customers

Here's a list of your loyalty customers who have shopped within your specified Frequency.

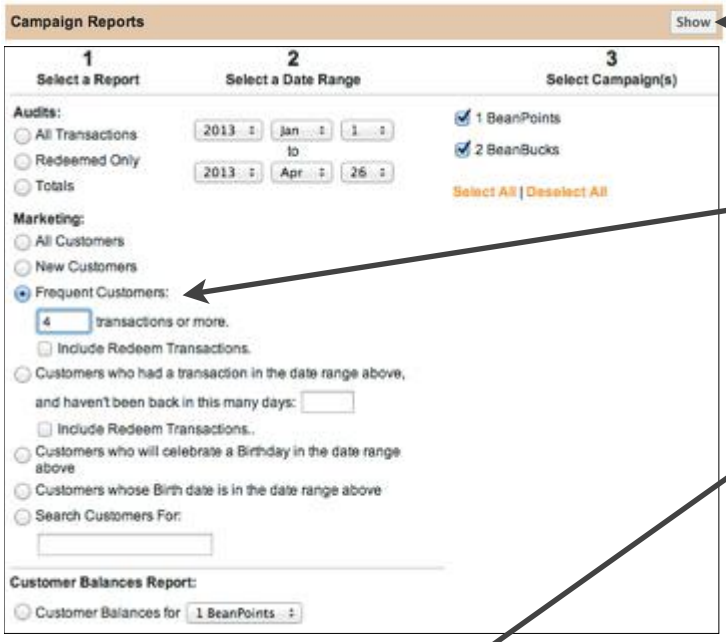
Every customer that has at least the number of transactions specified in the data range and campaigns selected

A start by clicking on the "Show" button

B select "Frequency Customers", the frequency number along with your preferred Date Range and Campaigns

C click on "Run Report" to view data

"Export to Excel" to export data



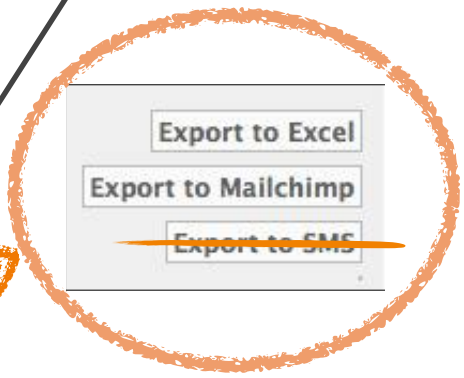
A

B

C

D

Run Report



Note: The "Export to SMS" feature is not currently available in Australia / New Zealand.

To send an SMS message, simply Export your selected clients to Excel and upload these contact names and mobile numbers to your preferred Australian / New Zealand SMS supplier.

Reporting

Missing Customer

Here's a list of your loyalty customers who have NOT shopped within your specified Frequency.

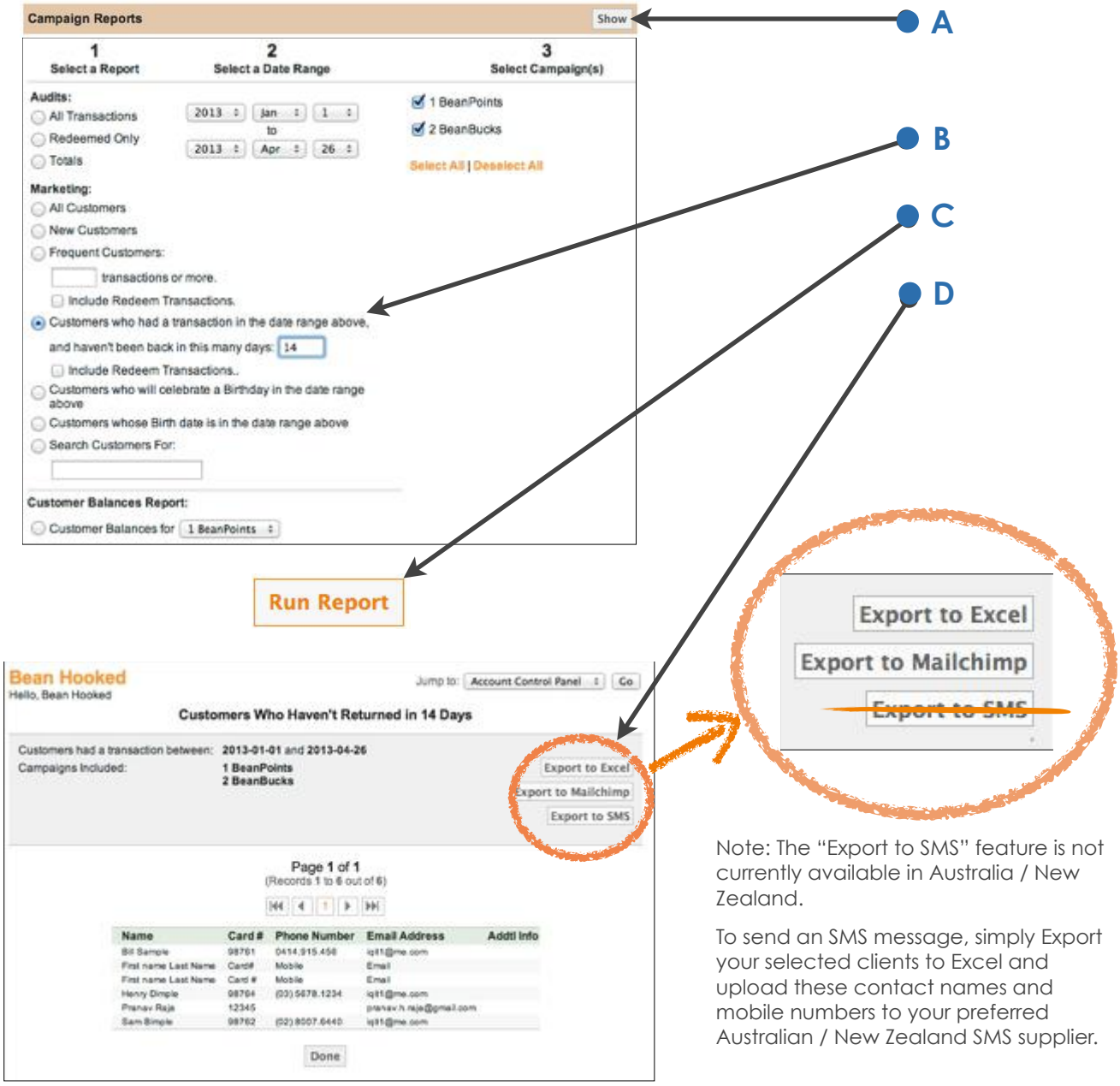
All the customers that haven't had any new transactions in the date range and campaigns selected, for at least the number of days specified

A start by clicking on the "Show" button

B select "Customers who have not been back", the frequency number along with your preferred Date Range and Campaigns

C click on "Run Report" to view data

D "Export to Excel" to export data



Note: The "Export to SMS" feature is not currently available in Australia / New Zealand.

To send an SMS message, simply Export your selected clients to Excel and upload these contact names and mobile numbers to your preferred Australian / New Zealand SMS supplier.

Reporting

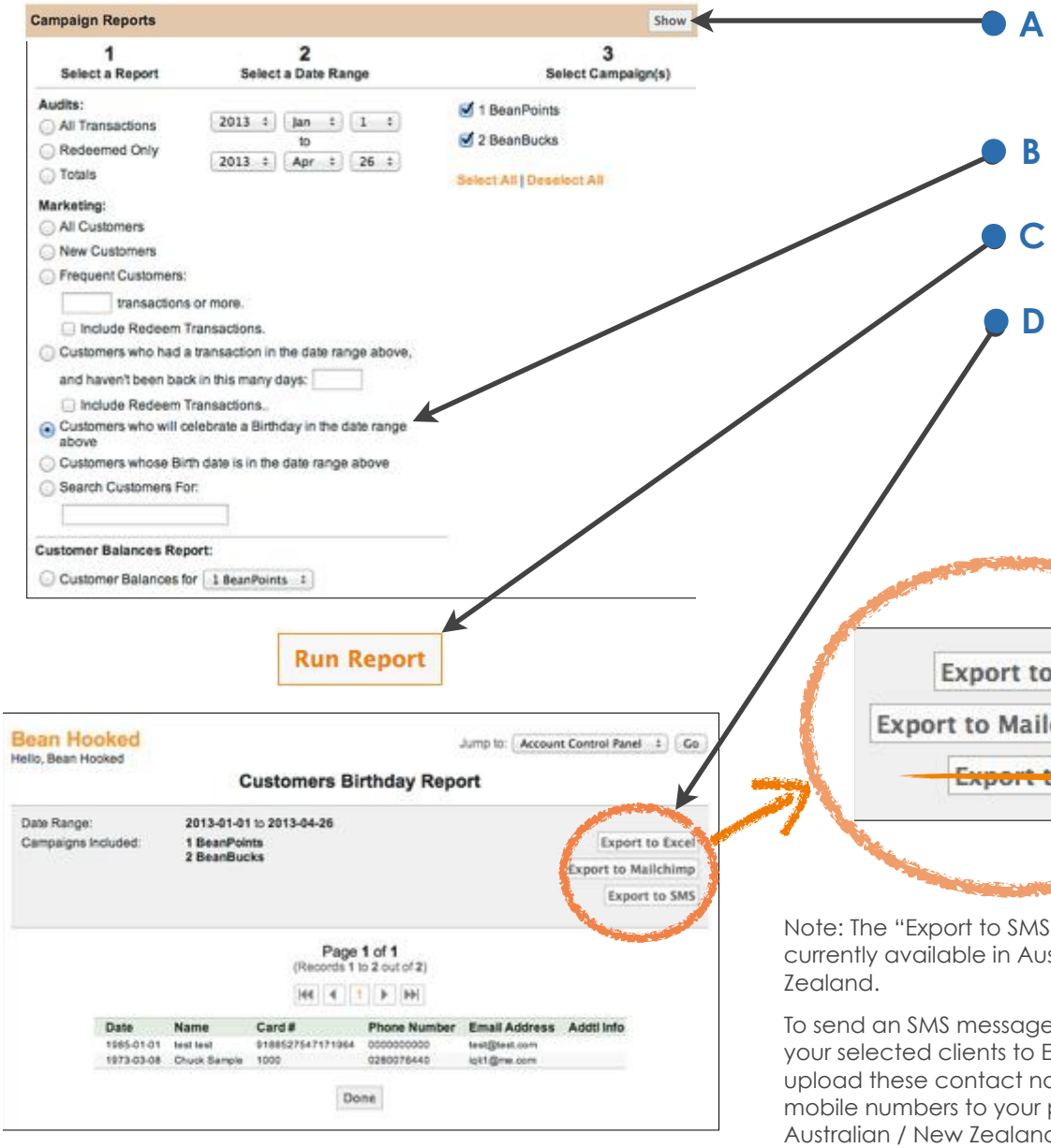
Birthday Customers

A start by clicking on the "Show" button

B select your preferred Date Range and the "Birthday in the date range above" Campaigns

C click on "Run Report" to view data

"Export to Excel" to export data



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Reporting

Search Customers

Here's a very specific search of your loyalty customers.

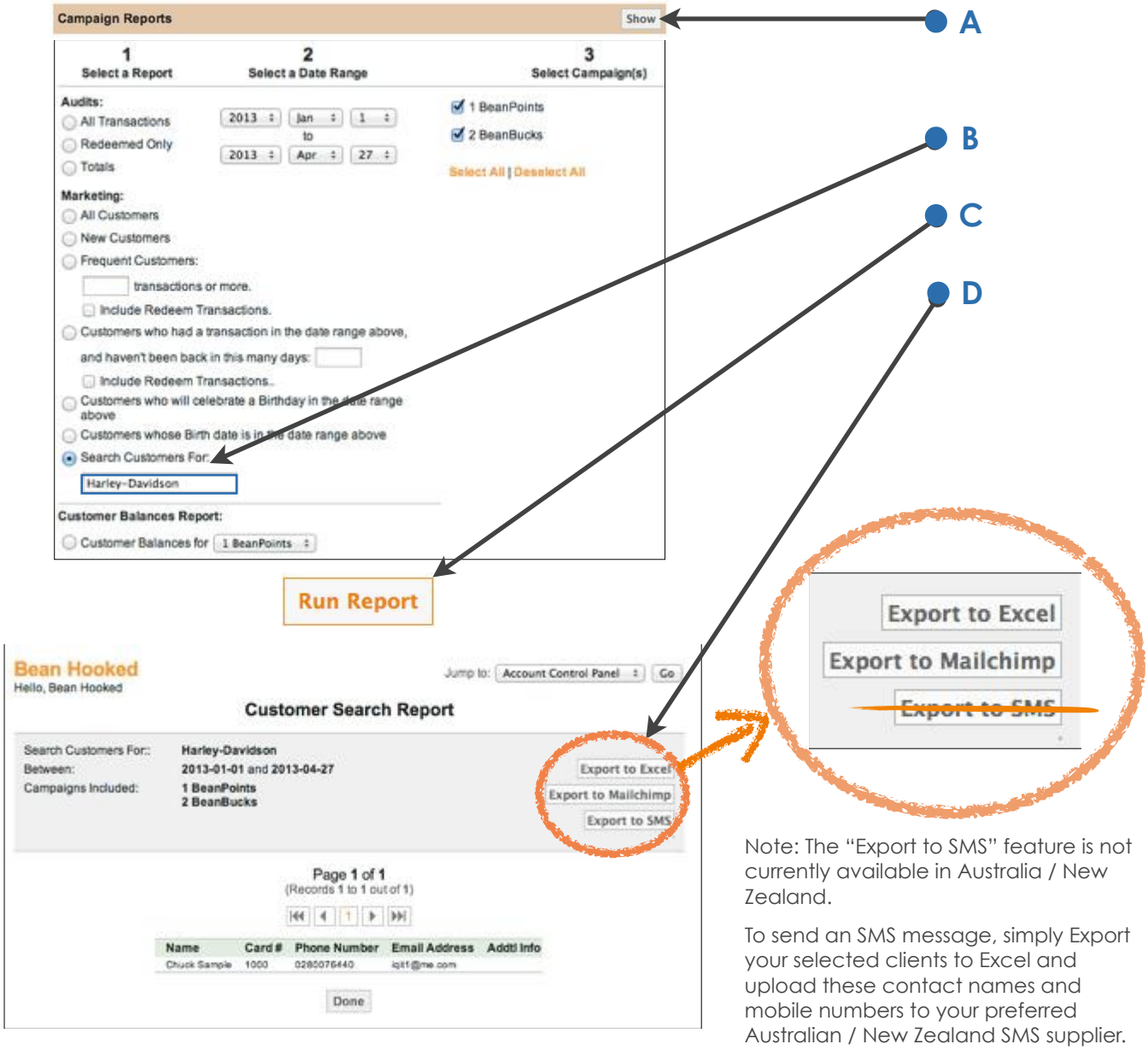
All the customers or their transactions that match the search term specified, in the date range and campaigns selected

A start by clicking on the "Show" button

B select your preferred Date Range and the "Search Customers" along with the Keyword (ie: Harley-Davidson) you wish to search for.

C click on "Run Report" to view data

D "Export to Excel" to export data



Note: The "Export to SMS" feature is not currently available in Australia / New Zealand.

To send an SMS message, simply Export your selected clients to Excel and upload these contact names and mobile numbers to your preferred Australian / New Zealand SMS supplier.

Reporting

Customer Balances

A list of all the customers that have any recorded balance and what their earned, redeemed, and current balances are.

Can also be used as another version of a Liability Report

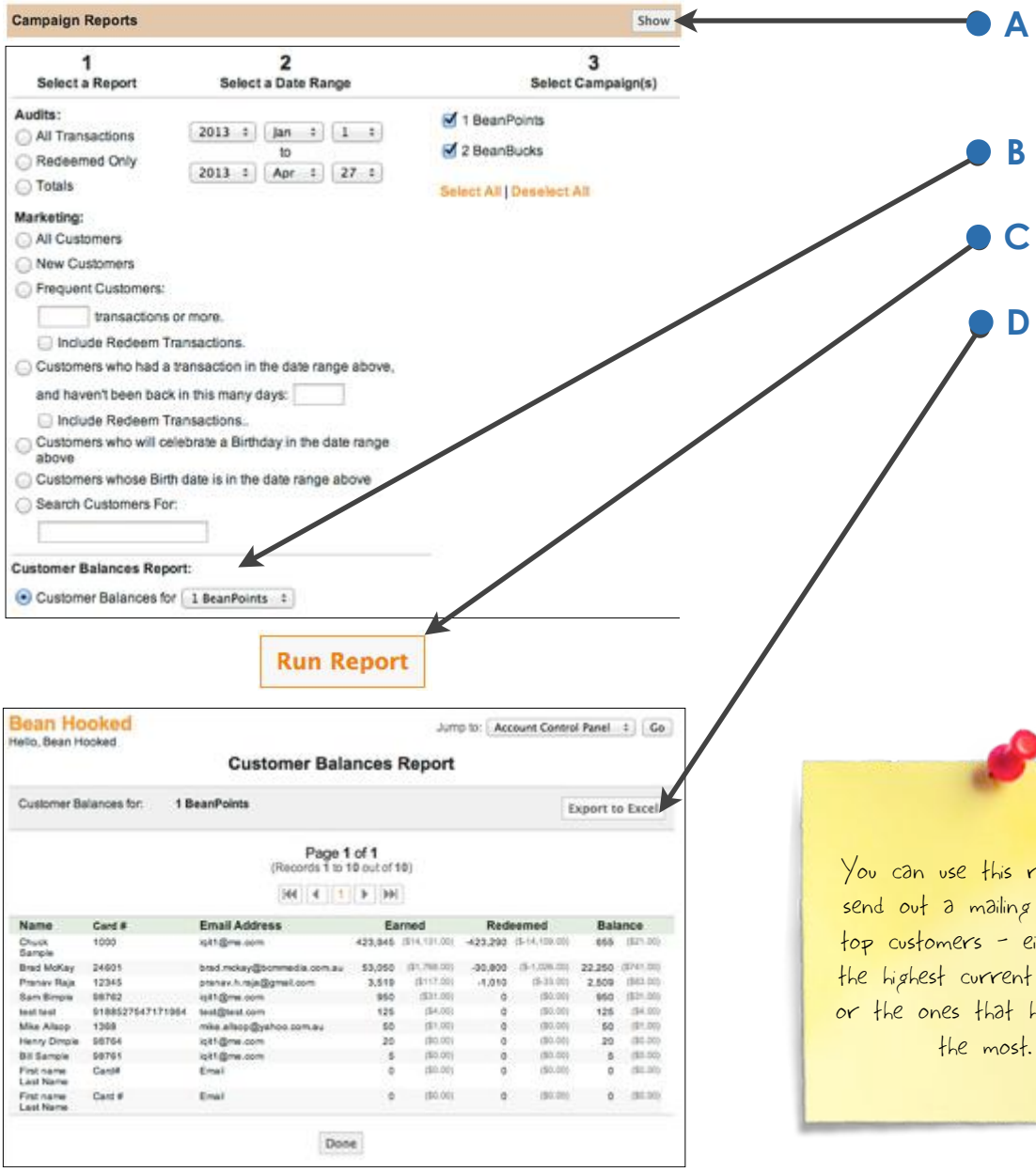
A start by clicking on the "Show" button

B select your preferred Date Range and "Customer Balances" along with your preferred campaign.

click on "Run Report" to view data

C

"Export to Excel" to export data



You can use this report to send out a mailing to your top customers - either with the highest current balances, or the ones that have spent the most.

Reporting

Coalition Points / Liability Audit

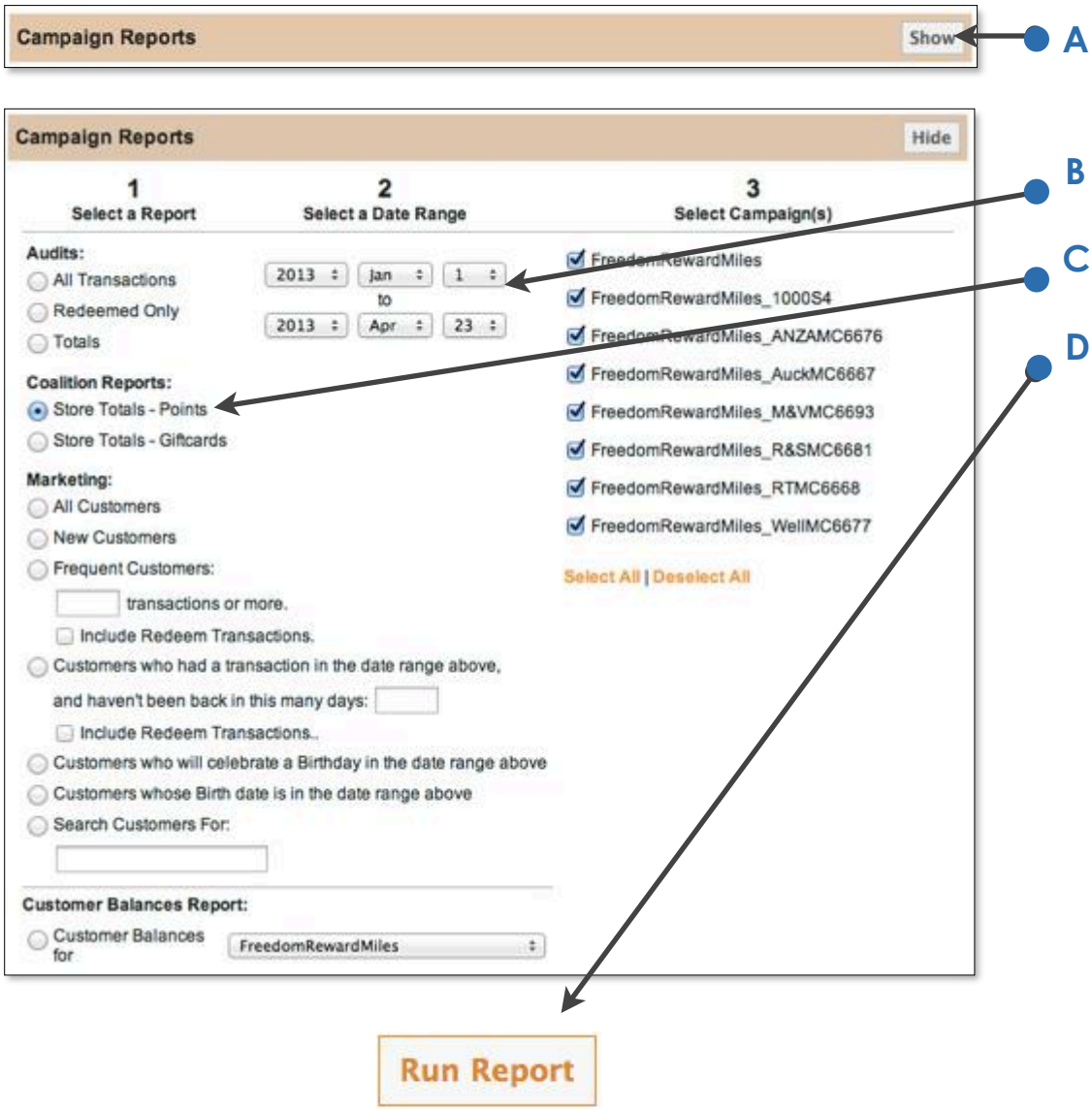
This Coalition Reporting feature is only displayed for Coalition Campaigns.
So you must be part of a Coalition / Franchise group to have with this feature :)

A start by clicking on the "Show" button

B select Customer Balances along with your preferred Date Range and Campaigns

C click/highlight "Store Totals - Points"

click on "Run Report" to view data



Reporting

Coalition Points / Liability Audit

This is a "Head-Office" view of the Coalition Reporting.

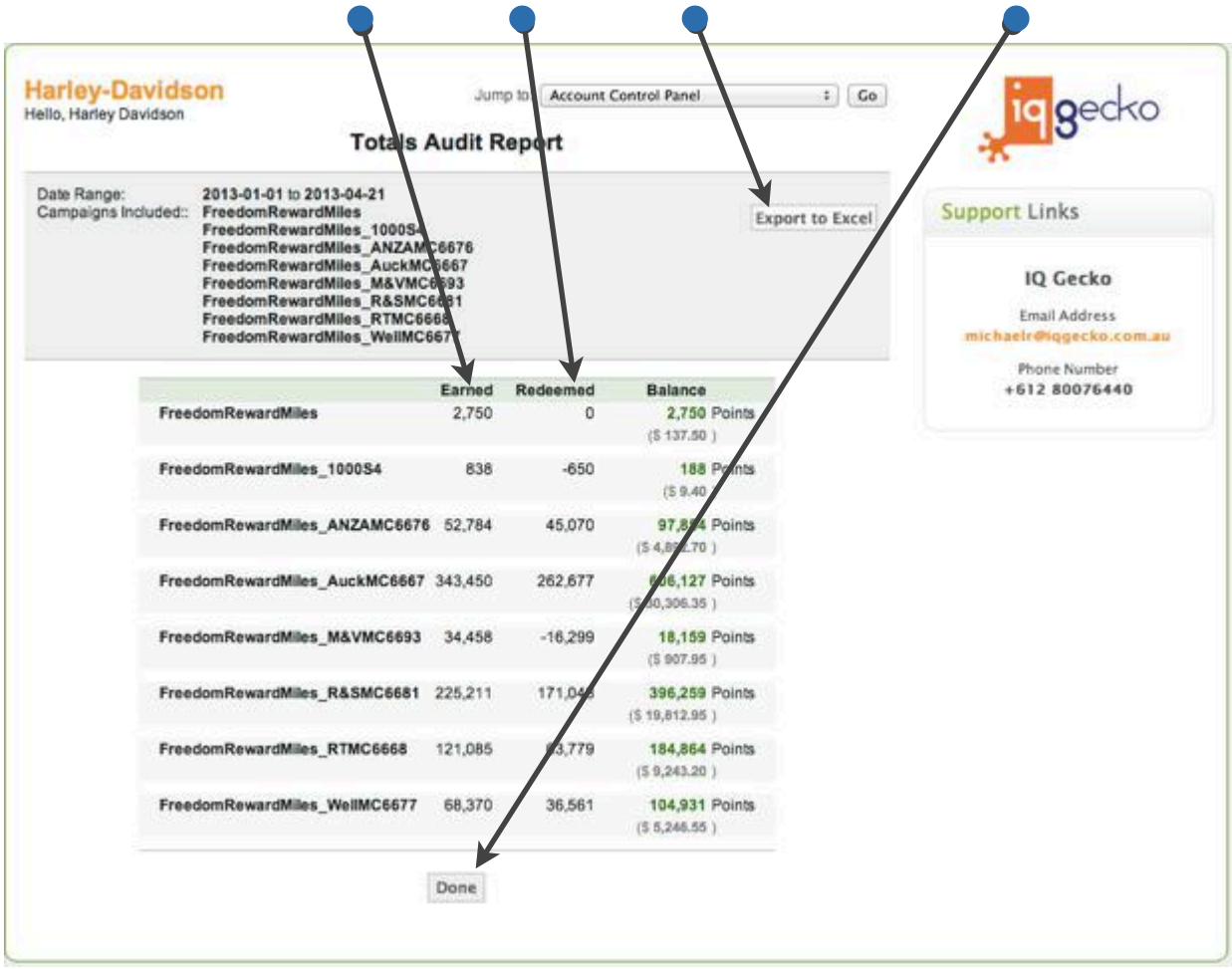
Each individual location will only see their own locations liability information

E displays points earned by the loyalty customer (Merchant liability) across the total campaign as well as the individual locations

F displays points redeemed by the loyalty customer (Merchant asset)

G click on "Export to Excel" to view data in a spreadsheet

click on "Done" to go back to the ClientToolBox home page



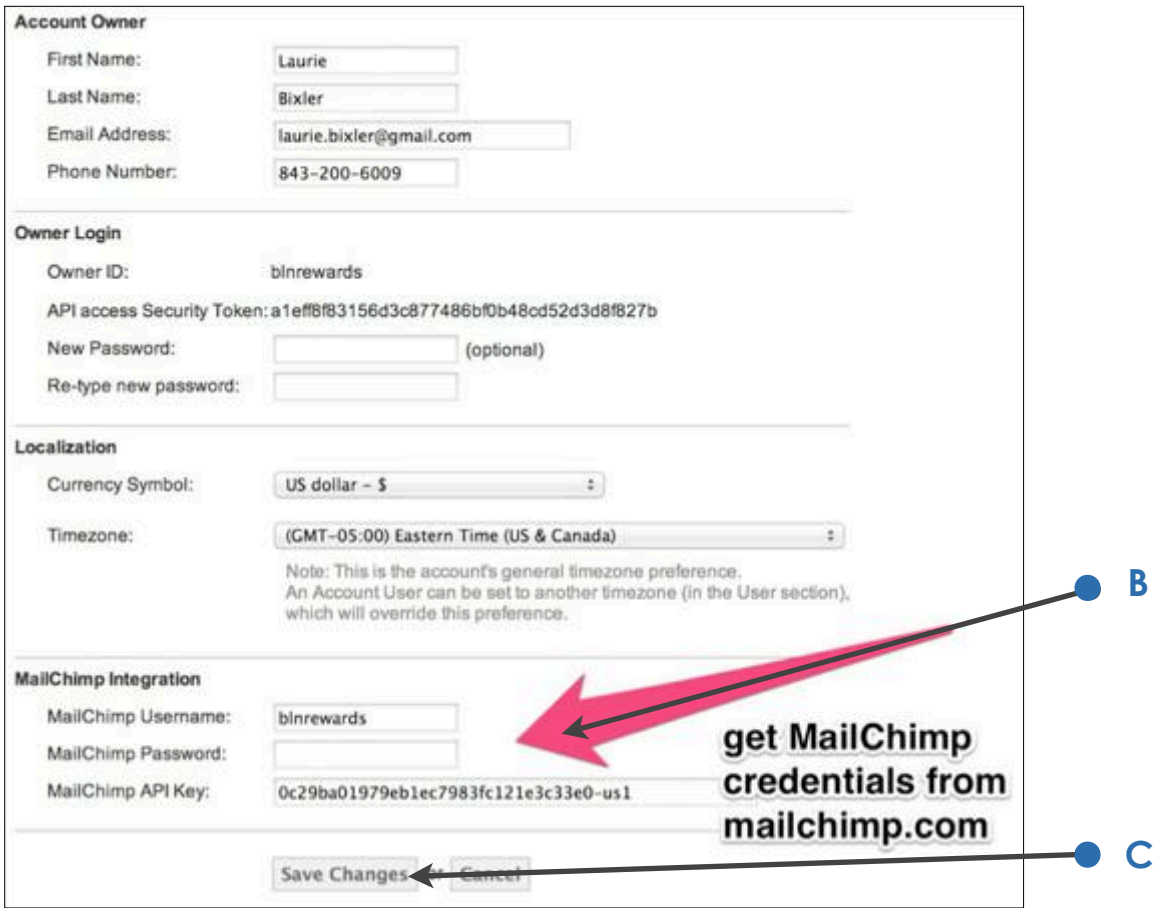
Reporting

Exporting to MailChimp

A on the front of the Admin page - click on "Edit"

B place your MailChimp credentials are placed in the MailChimp Integration section in your Account Information area

C click on "Save Changes"



Reporting

Export to MailChimp (continued)

Choose to Mailchimp email All of your loyalty customers or:

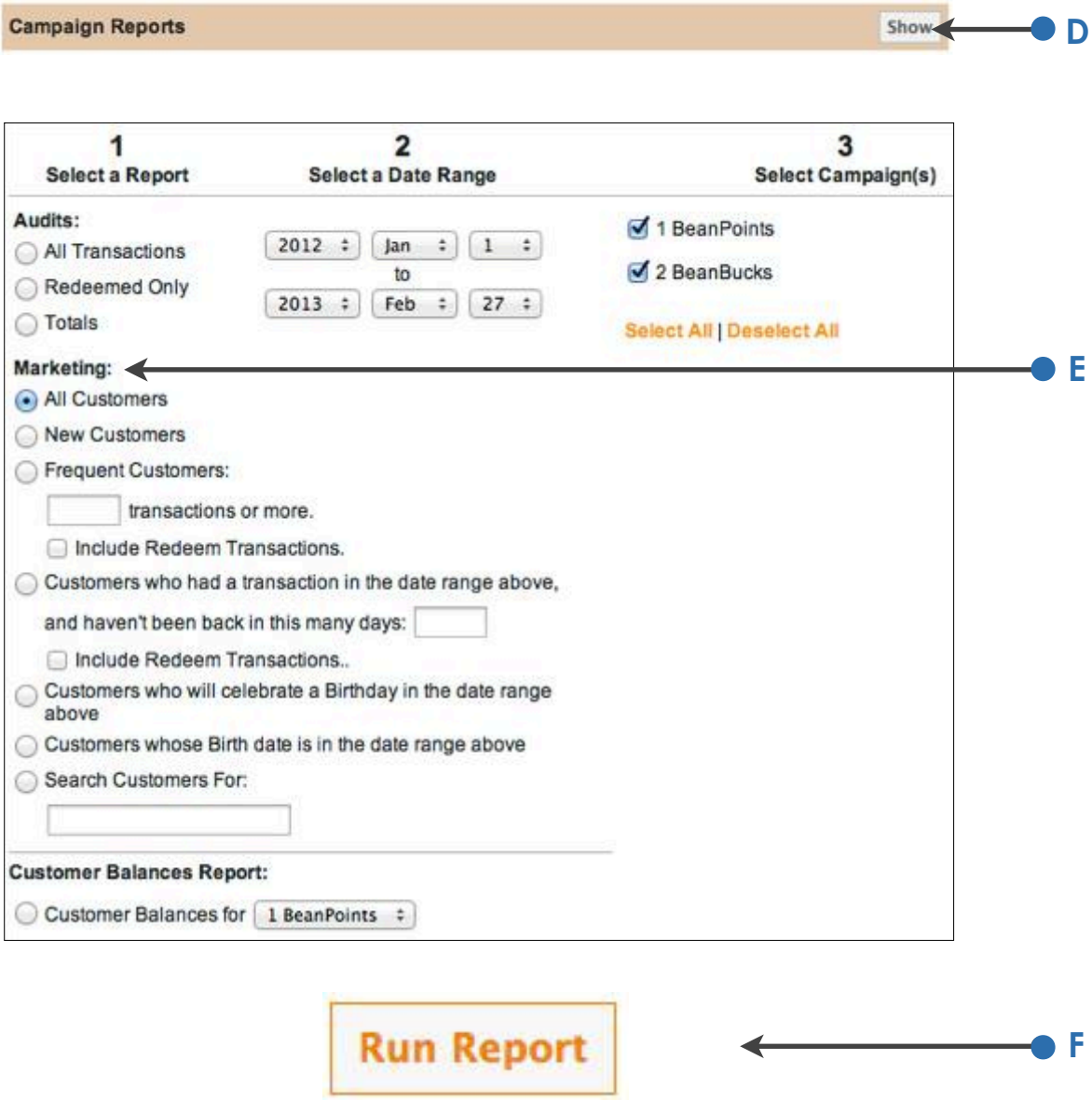
As shown in this guide, you can also segment by:

* date range
* purchase frequency,
* birth dates
* search customers by keywords
* and more

D start by clicking on the "Show" button

E simply "Check" your preferred Marketing Report

F click the "Run Report" button



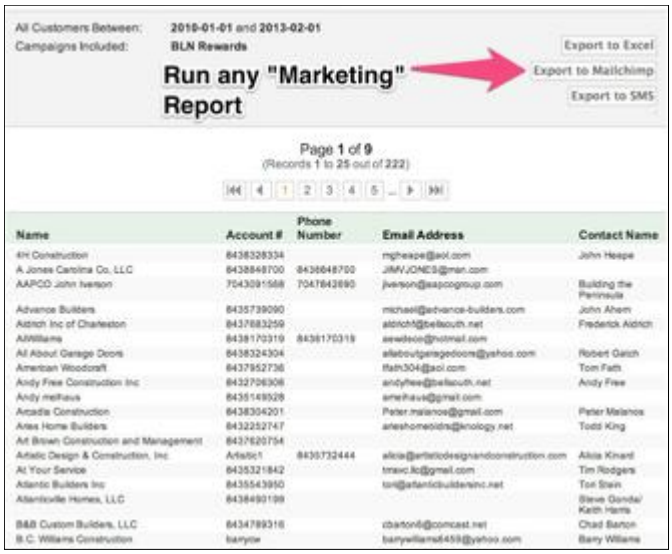
Reporting

Export to MailChimp (continued)

G click on "Export to MailChimp"

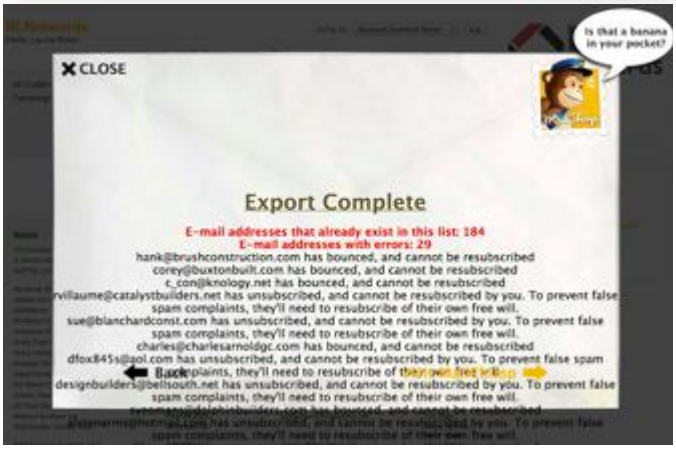
H select your preferred MailChimp List to Export to

I once your Exported is Complete you can run your MailChimp



G

H



I

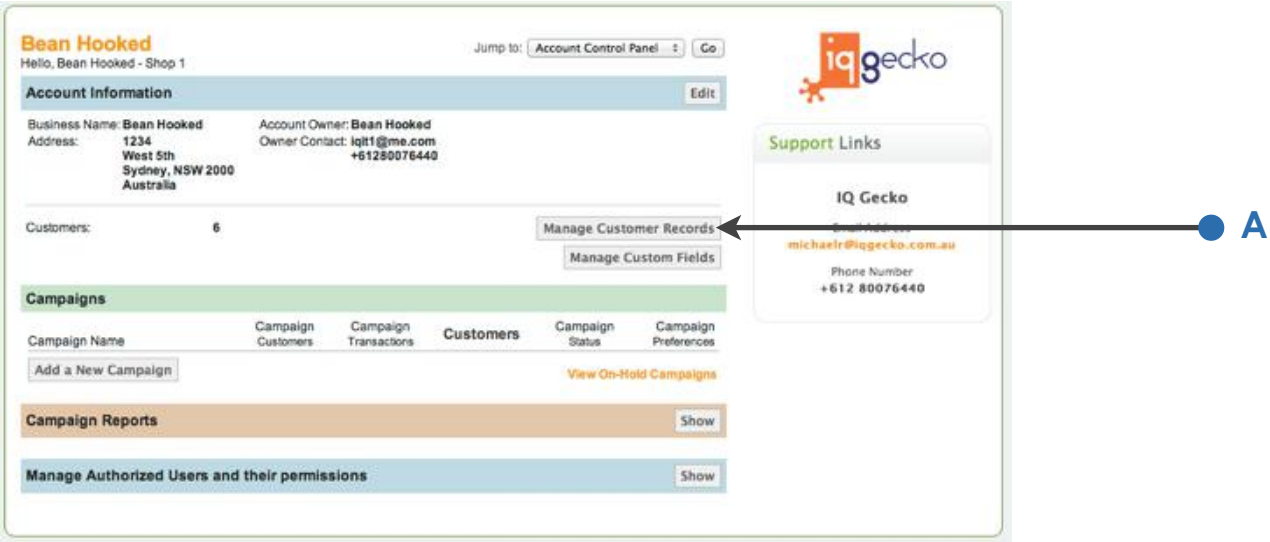
Manage Records & Fields

Customer Records

A click on "Manage Customer Records"

B there is a selection of easy customer look-up types including customer name, card number and more.

If you wish to view All Customers simply click on the "Find" button while have ***no data*** in the lookup fields.

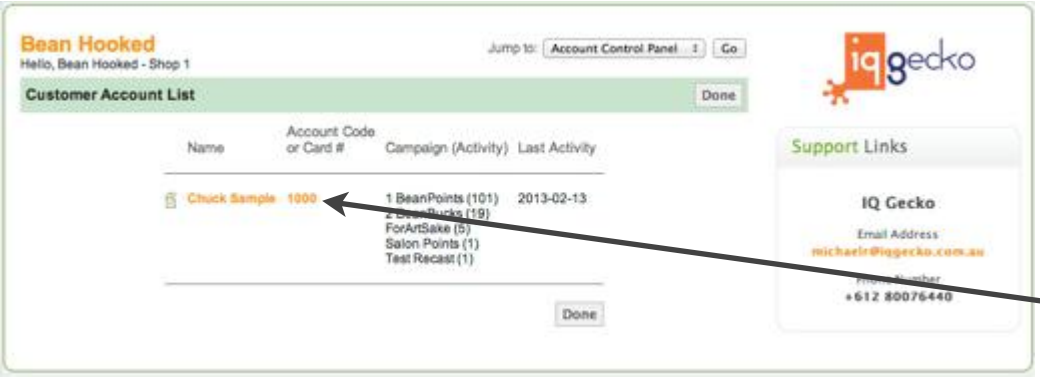


Manage Records & Fields

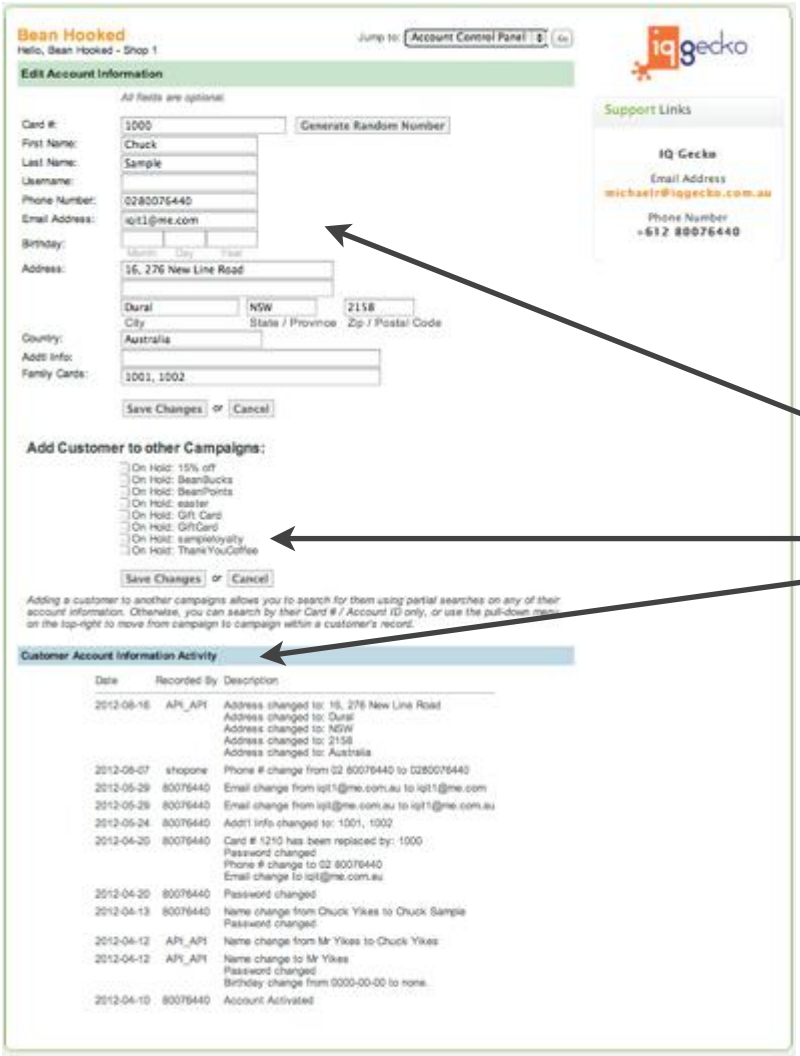
Customer Records (continued)

D click on your chosen "Customer Record"

E easily Edit the Customer's Account Information, add them to other Campaigns and Review Customer Activity



D



E

Manage Records & Fields

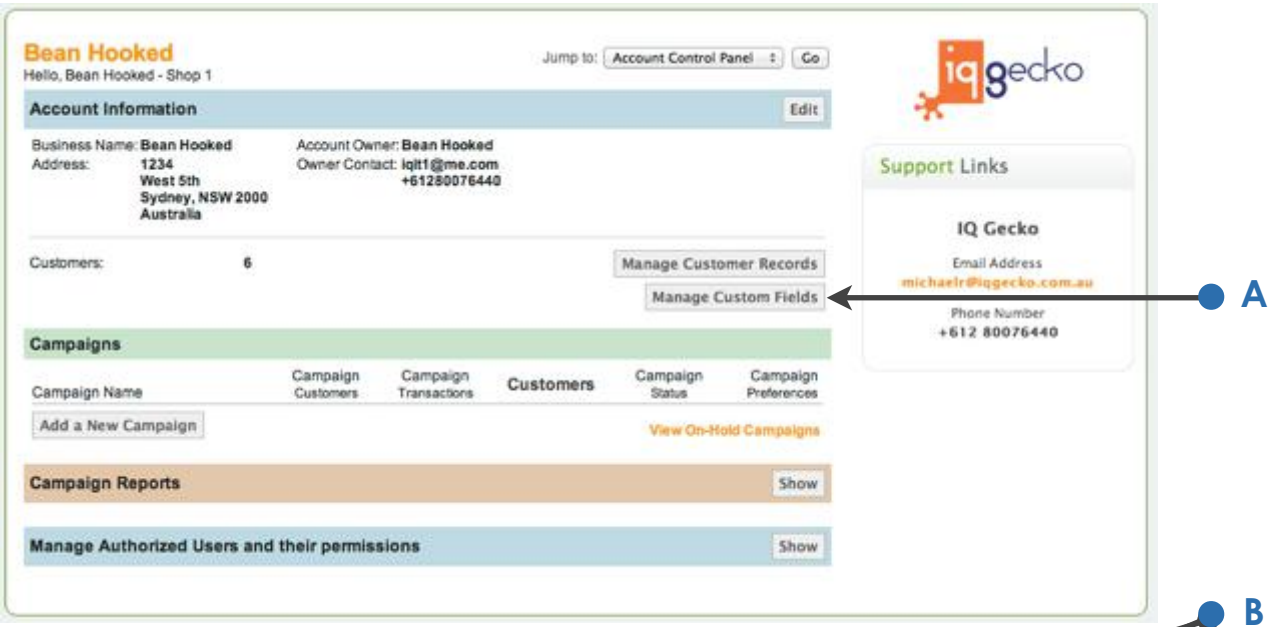
Custom Fields

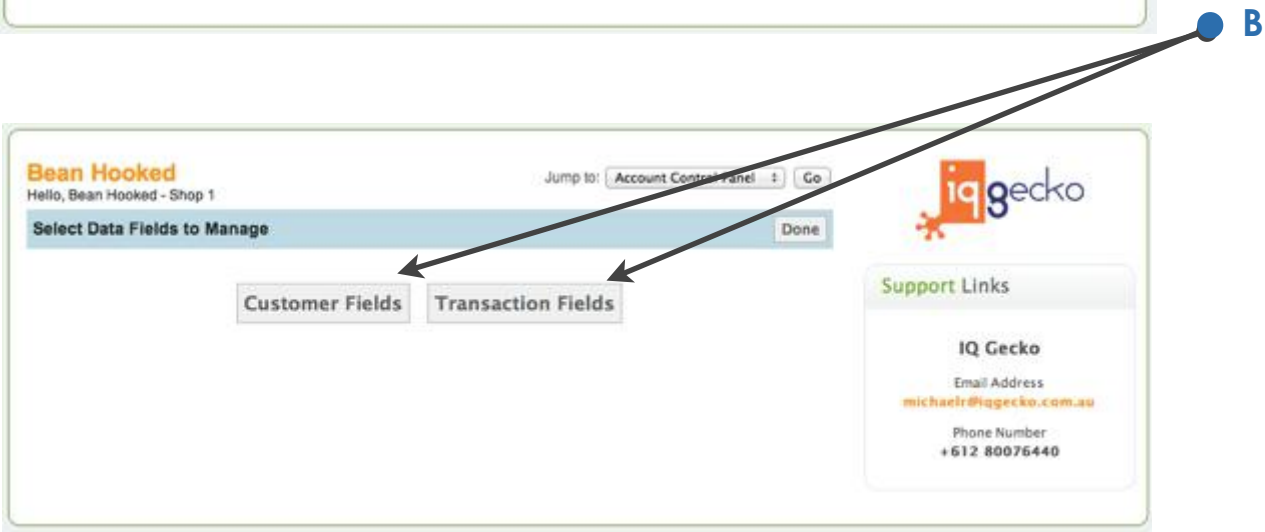
Use these selections to add more field types for your specific loyalty solution.

These features are normally used in conjunction with an IQ Gecko "HotSite", a "SaleGrabber - interfaced to POS" or custom integration solution.

A click on "Manage Custom Fields"

B click on your preferred field type.



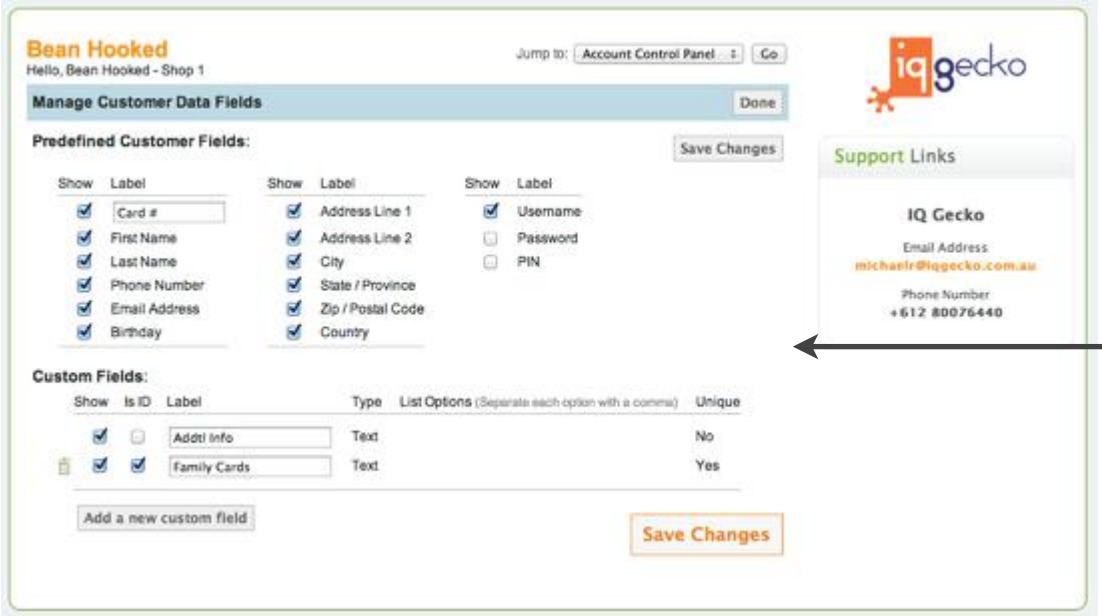


Manage Records & Fields

Custom Fields (continued)

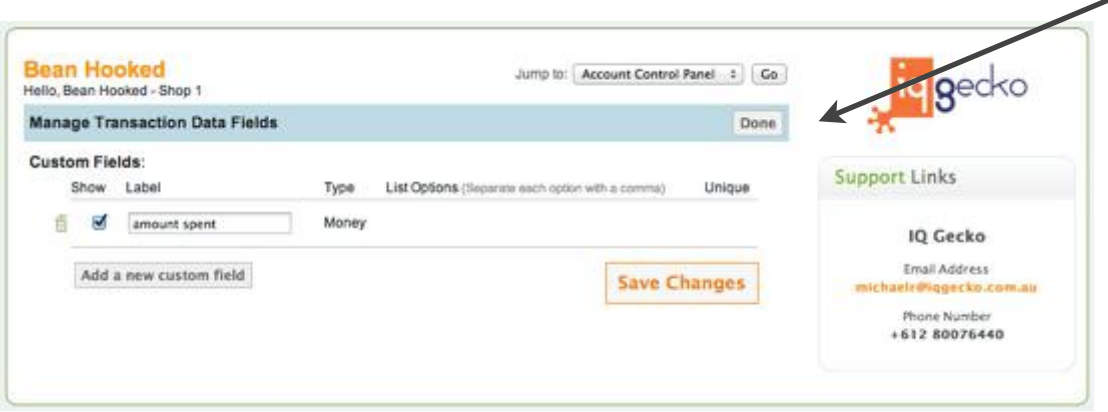
C Customer Fields

D Transaction Fields



C

D

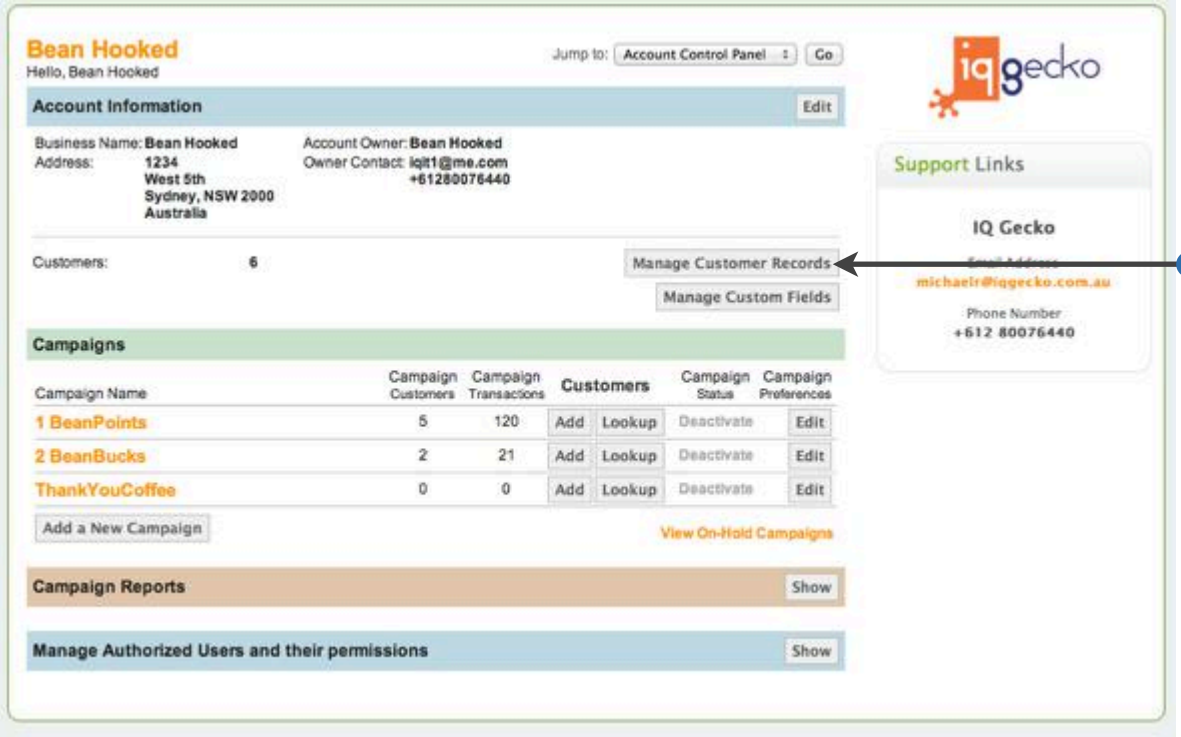


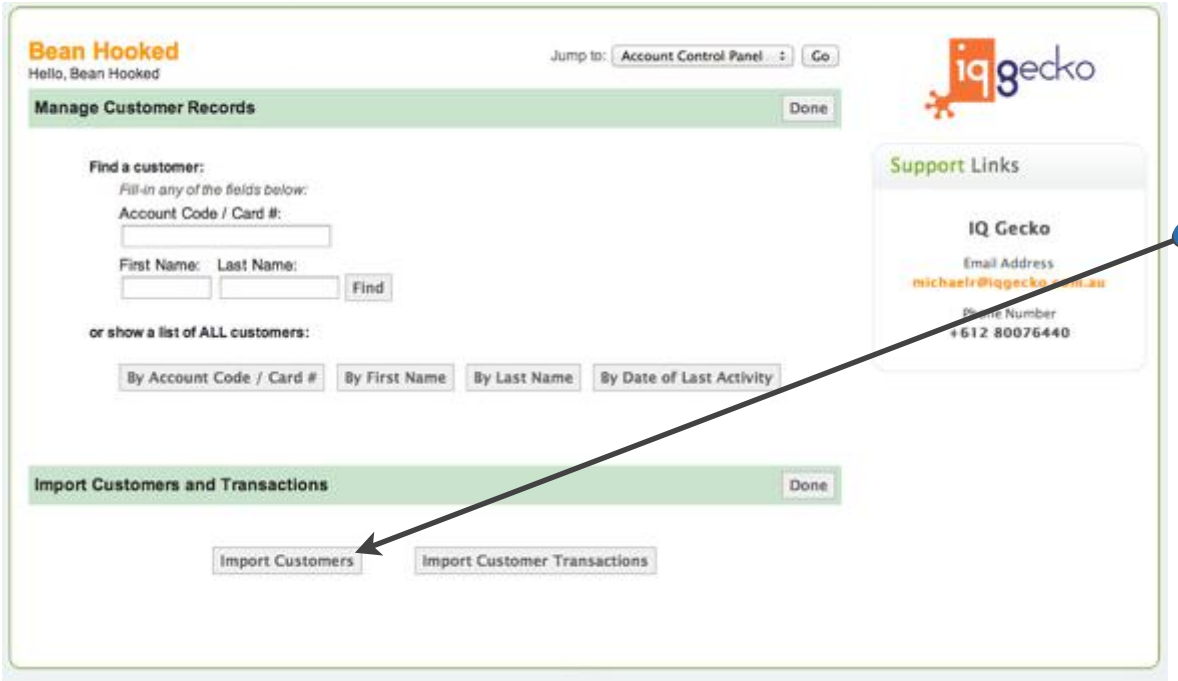
Import

Customers

A click on "Manage Customer Records"

B click on "Import Customers"



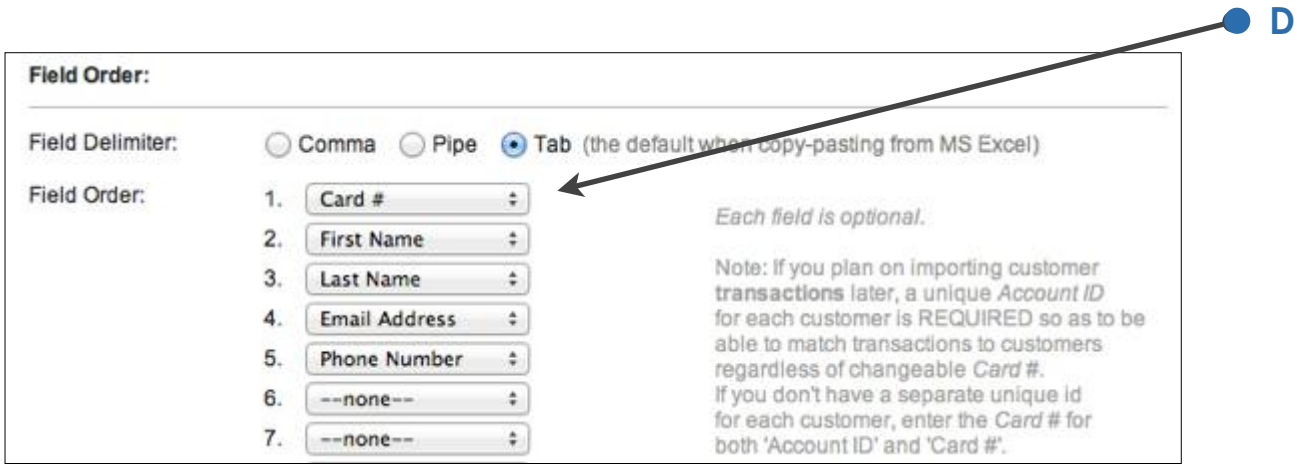


Import

Customers (continued)

C Select the campaign(s) you want those customers to be added to.

D Specify how each column is separated, and in what order.



Import

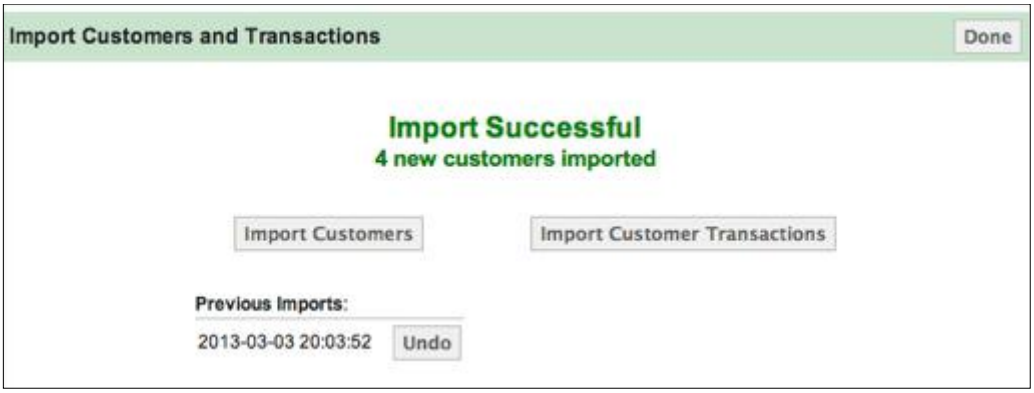
Customers (continued)

E Copy-paste your list in the large box, and check the box if you want matching records (with the same account id / card #) to be over-written or ignored.

Note1: The first row is not imported as it is your column header (Card#, First Name, etc) and is only used do that you can confirm that you have imported data for you to compare with your "Field Order" (step D) that you have aligned all the data correctly.

Note2: Dates can be in any of the following formats (Years must be in 4-digit format): YYYY/MM/DD, YYYY-MM-DD, YYYY.MM.DD, MM/DD/YYYY, MM-DD-YYYY, MM.DD.YYYY

F Click "Import Customer"

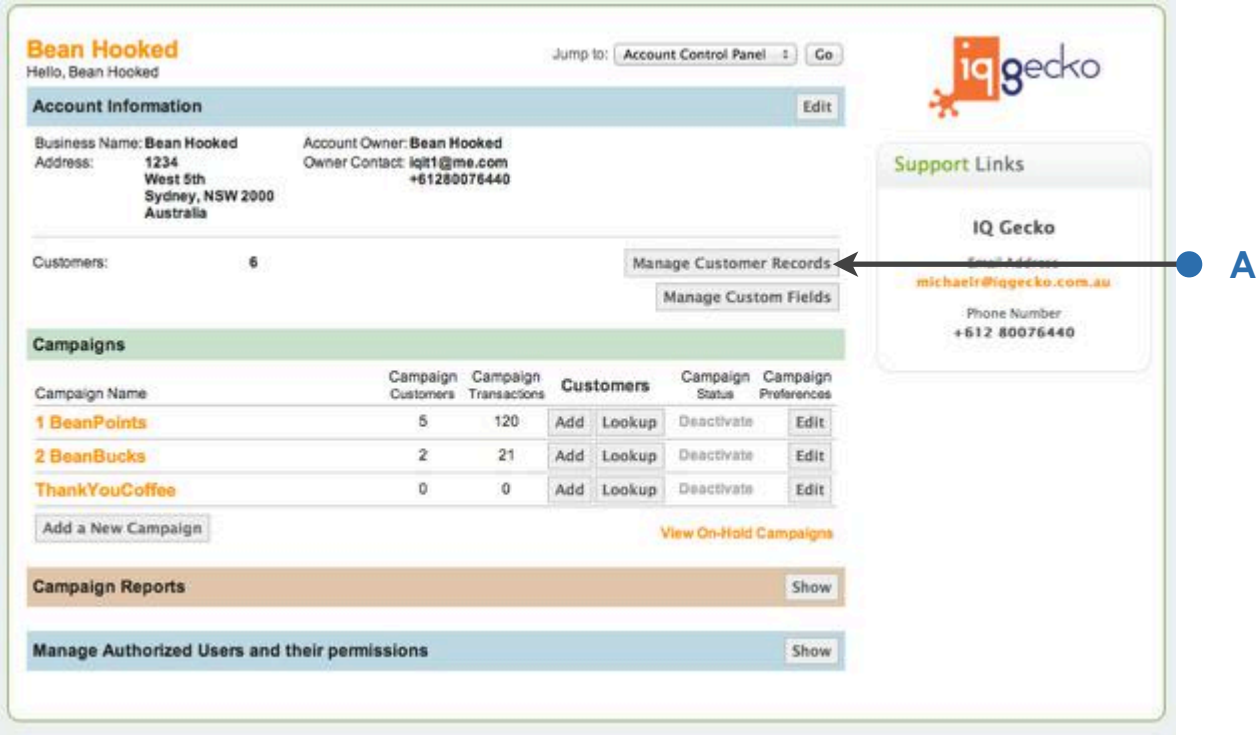


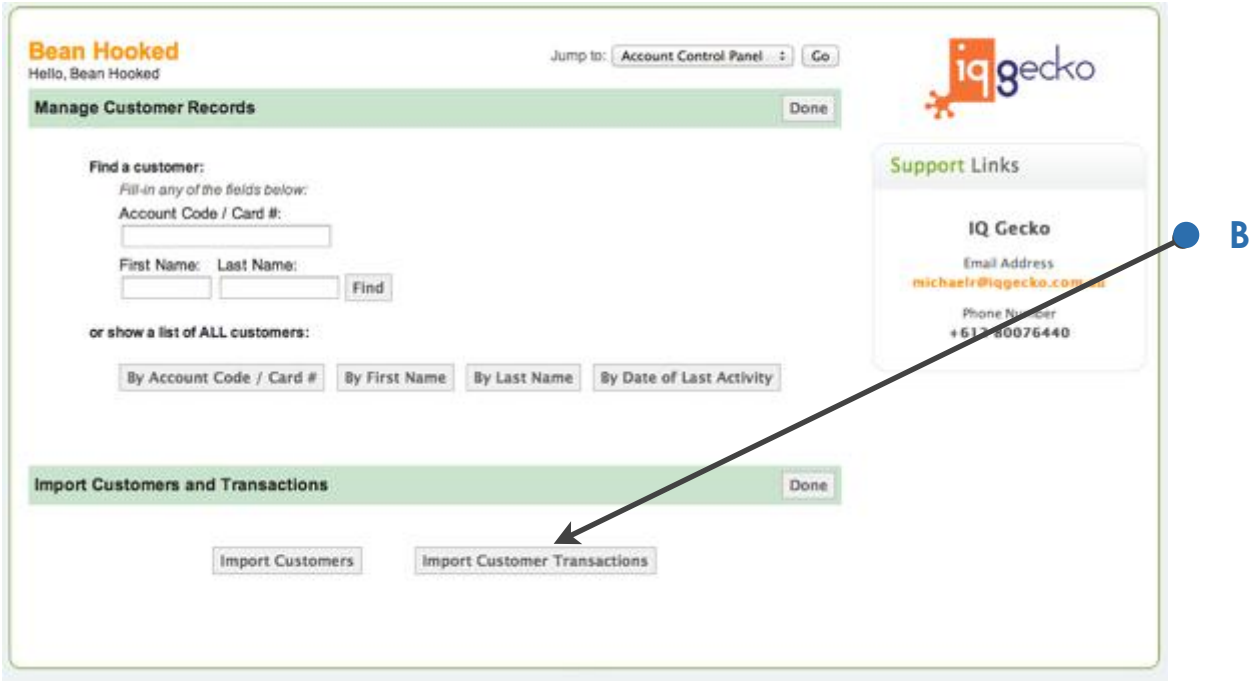
Import

Customer Transactions

A click on "Manage Customer Records"

B click on "Import Customer Transactions"





Import

Customer Transactions (continued)

C Using the DropDown box - design the applicable Field Order selection so that it reflects the order of the columns in your Microsoft Excel spreadsheet that you wish to import.

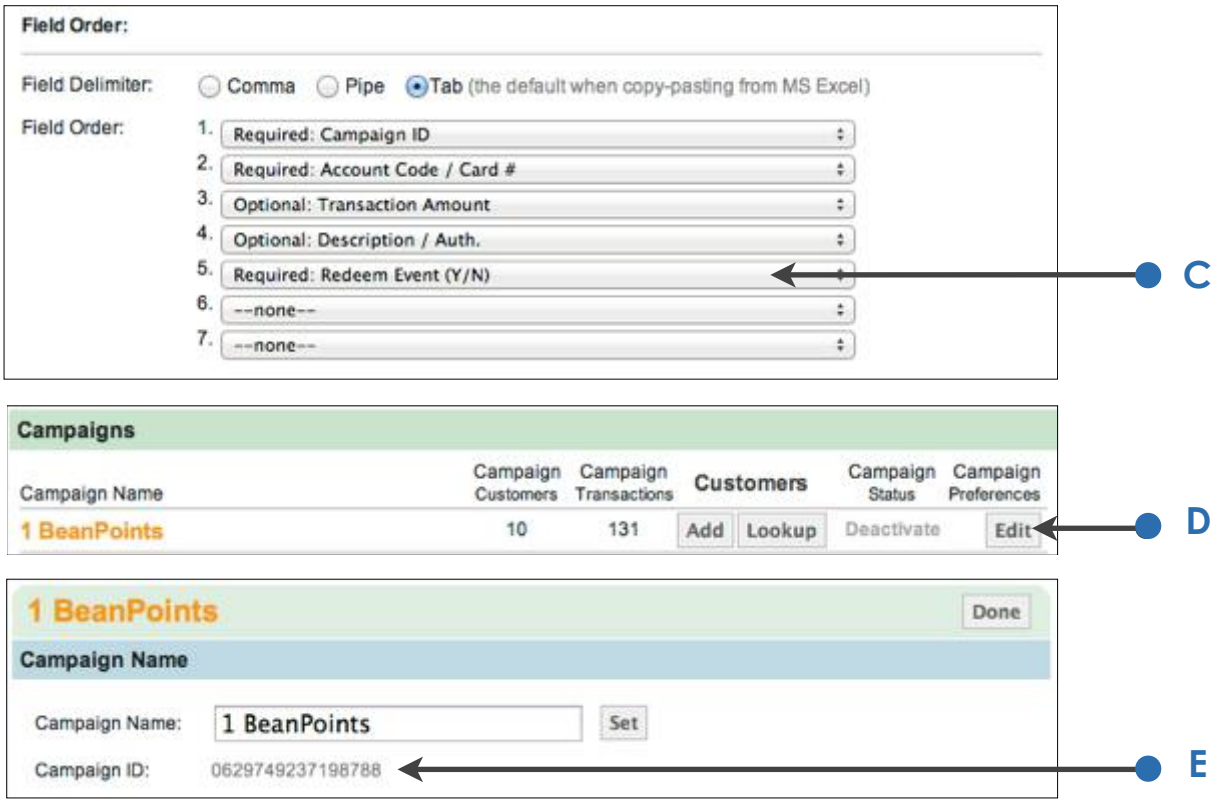
Note: You *MUST* include the "**Required: Redeem Event (Y/N)**" field as StickyFeet needs to know if you wish to convert the imported "Transaction Amount" into Points - based on your campaign design (example: 5 points for every dollar).

In your MS Excel spreadsheet - if you currently do not have a column designated to this decision then please add a column with a simple **Y** (for YES, please convert the value for points) or **N**, (for NO, do not convert the value for points).

D In your MS Excel spreadsheet - ensure that you include the customer "Account Code / Card #" that you want to import your customer transactions into.

E In your MS Excel spreadsheet - ensure that you include the applicable "Campaign ID" that you want to import your customer transactions into.

Note: Your Campaign ID is found in the Client Tool Box by clicking on the "Edit" button of your designated campaign.



Import

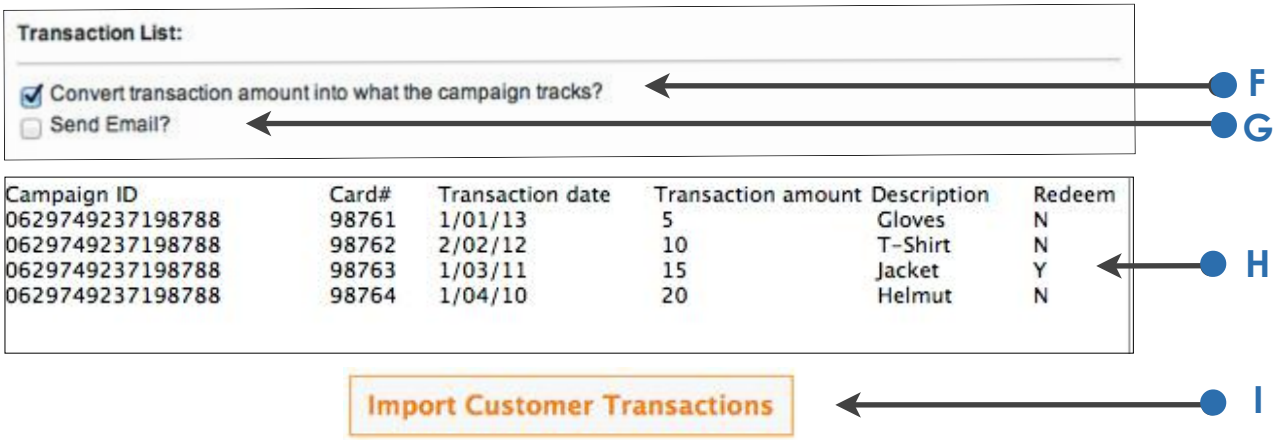
Customer Transactions (continued)

F If you wish for your imported "Transaction Amount" to be converted please ensure that you tick the "Convert Transaction amount into campaign tracks" section.

G If you wish alert your customers that you have imported their points using the automated email text that you set up in your campaign, then tick the "Send Email" option.

H Copy from MS Excel and Paste the customers' transactions data in the box.

I Press on the "Import Customer Transactions" button.



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