Client Dashboard Quick Guide

engaging loyalty that sticks

Features

Setup

Account Settings

Set up and manage your business loyalty account.

Email & SMS Communications

Engage customers further through Email and SMS.

Loyalty Program Campaigns

Set up and manage a loyalty program that works best for your business and your marketing goals.

Customer and Transaction Fields

Customize the information you get from your customers and their transactions.

Memberships

Create and manage a membership program to reward customers based on how much they contribute to your business.

Employee Roles & Permissions

Control access to the loyalty program for every single employee

Usage

Record Customer Visits

Use this mobile responsive interface to record customer visits and redemptions.

Generate Reports

Get the data you need to improve and enhance your loyalty program.

Customer Records

Access and manager all customers participating in your loyalty program.

Export Data

Export data to analyze it further or to import it into any 3rd party service.

Dashboard Insights

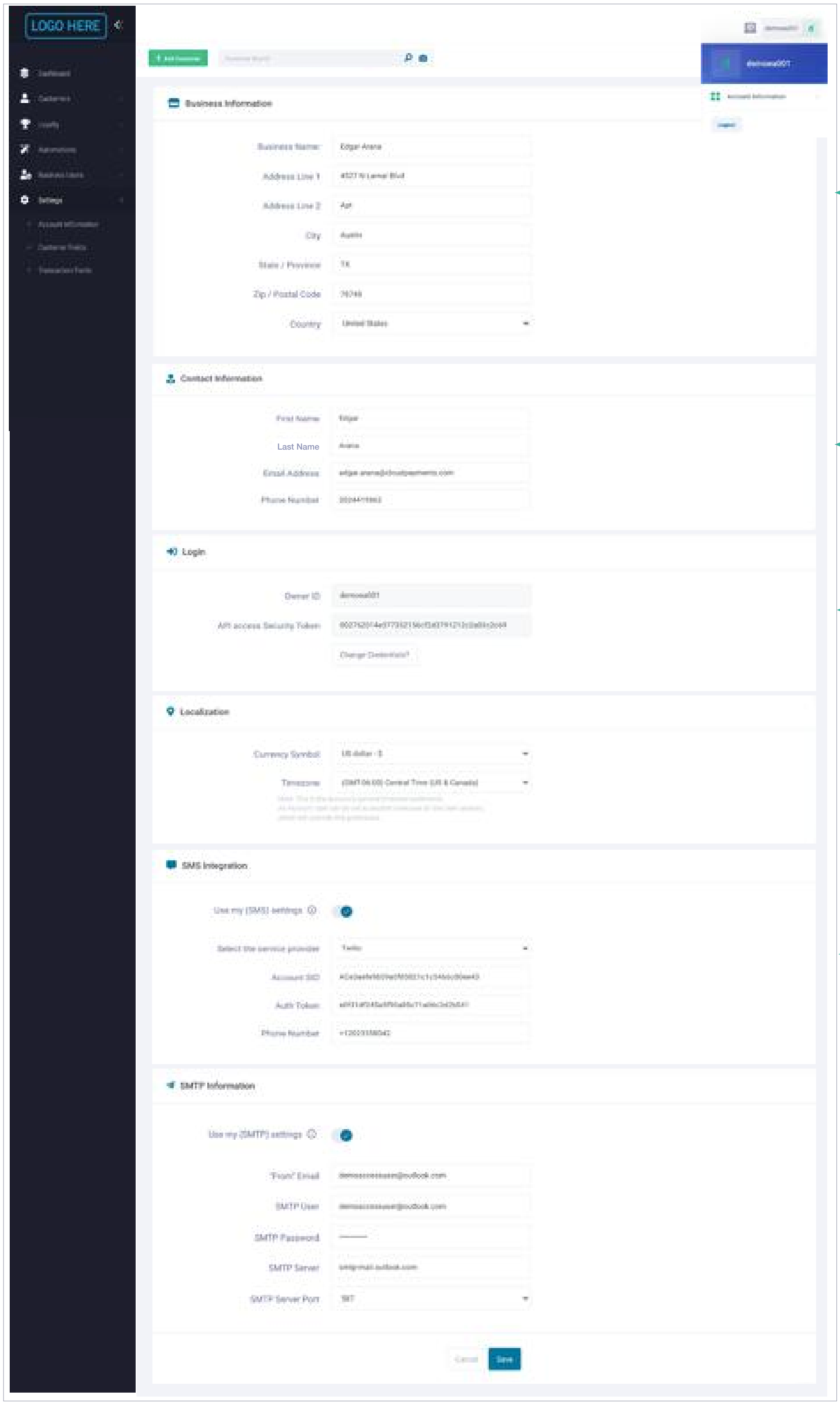
Monitor your loyalty program performance from a single screen.

Boost Promotions

Automate your promotions and create incentives to drive more visits and boost your business.

Account Settings

Set up and manage your business loyalty account



Business Information

Business Owner/Manager Contact Information

Account Unique Credentials

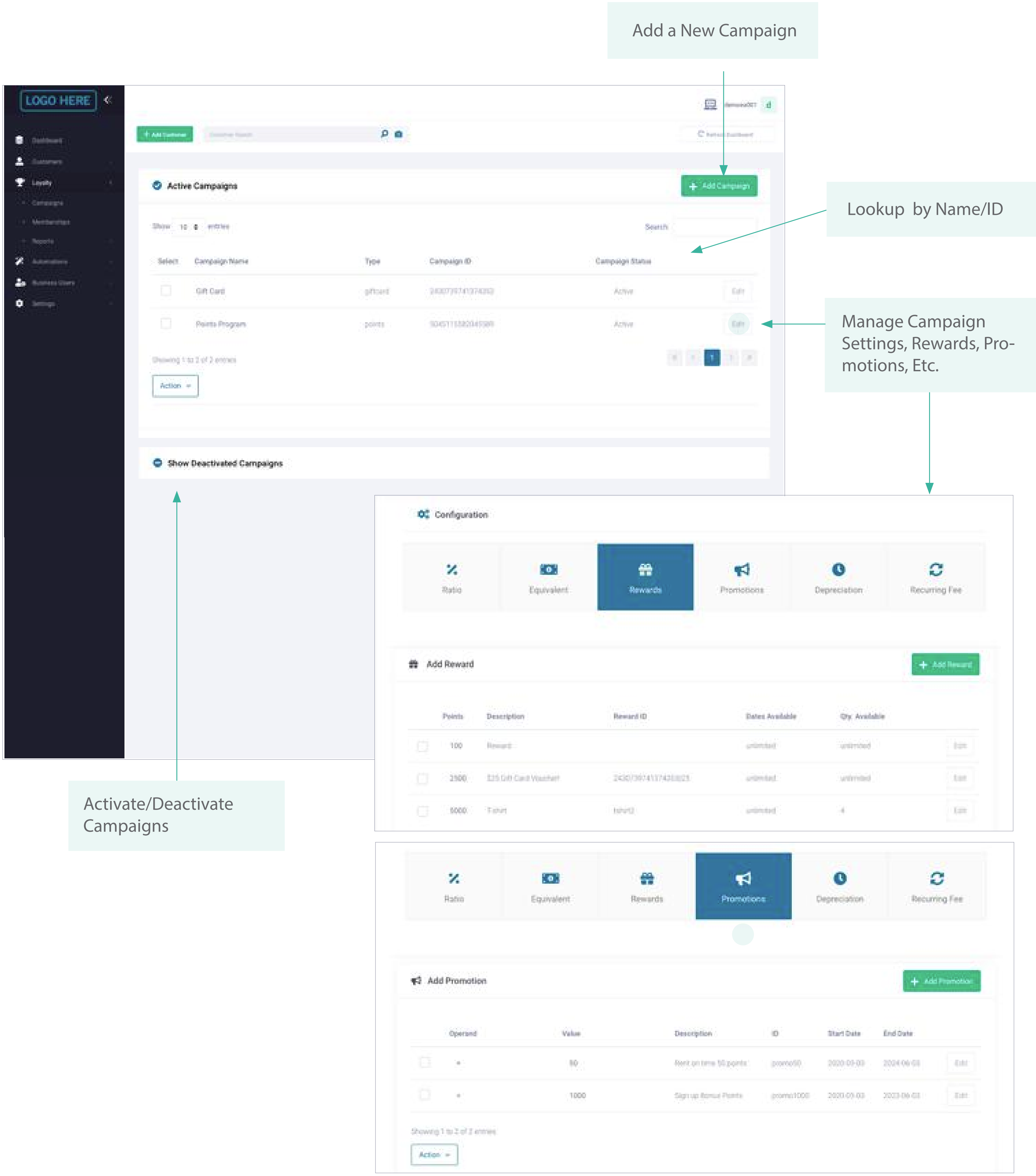
Account Currency and Timezone

Twilio Account Credentials to enable Transactional SMS

SMPT Credentials to send emails from your own email server *Required

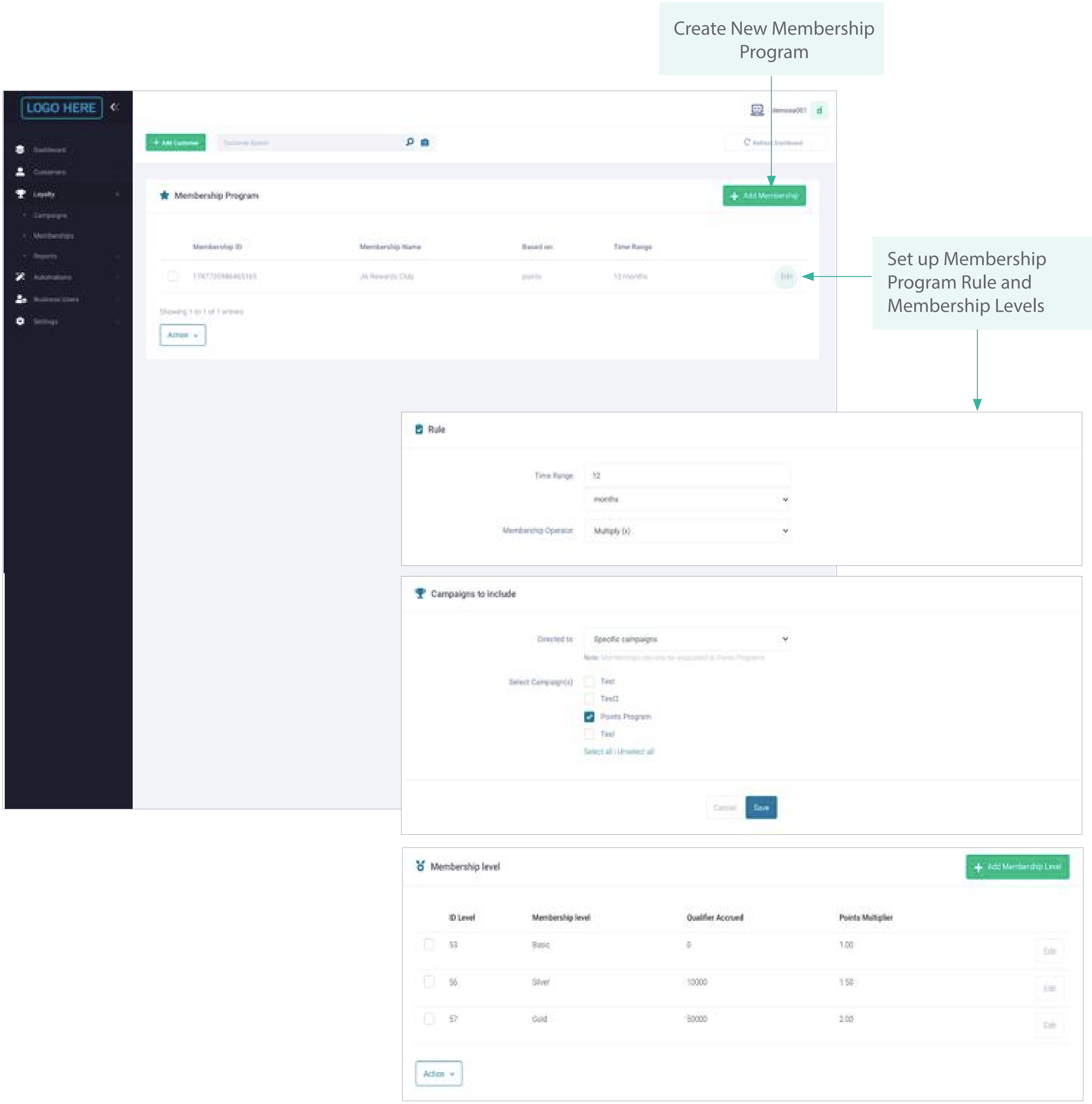
Loyalty Prgram Campaigns

Set up and manage a loyalty program that works best for your business and marketing goals



Memberships

Create and manage a Membership Program to reward customers based on how much they contribute to your business

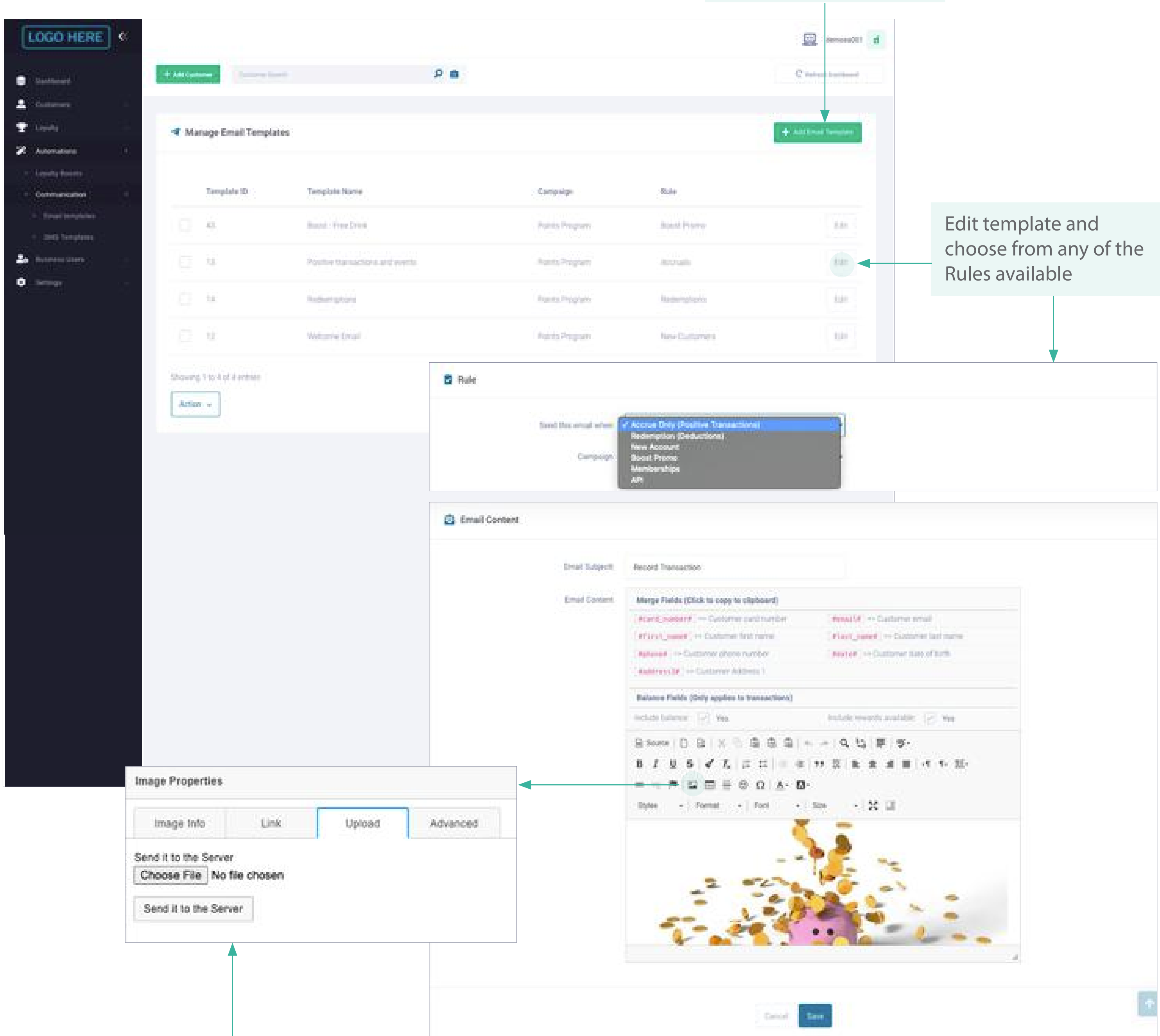


Email & SMS Communications

Engage your customers further with Transactional Emails & SMS

Create New Template

Edit template and choose from any of the Rules available



Upload images for any Email Template

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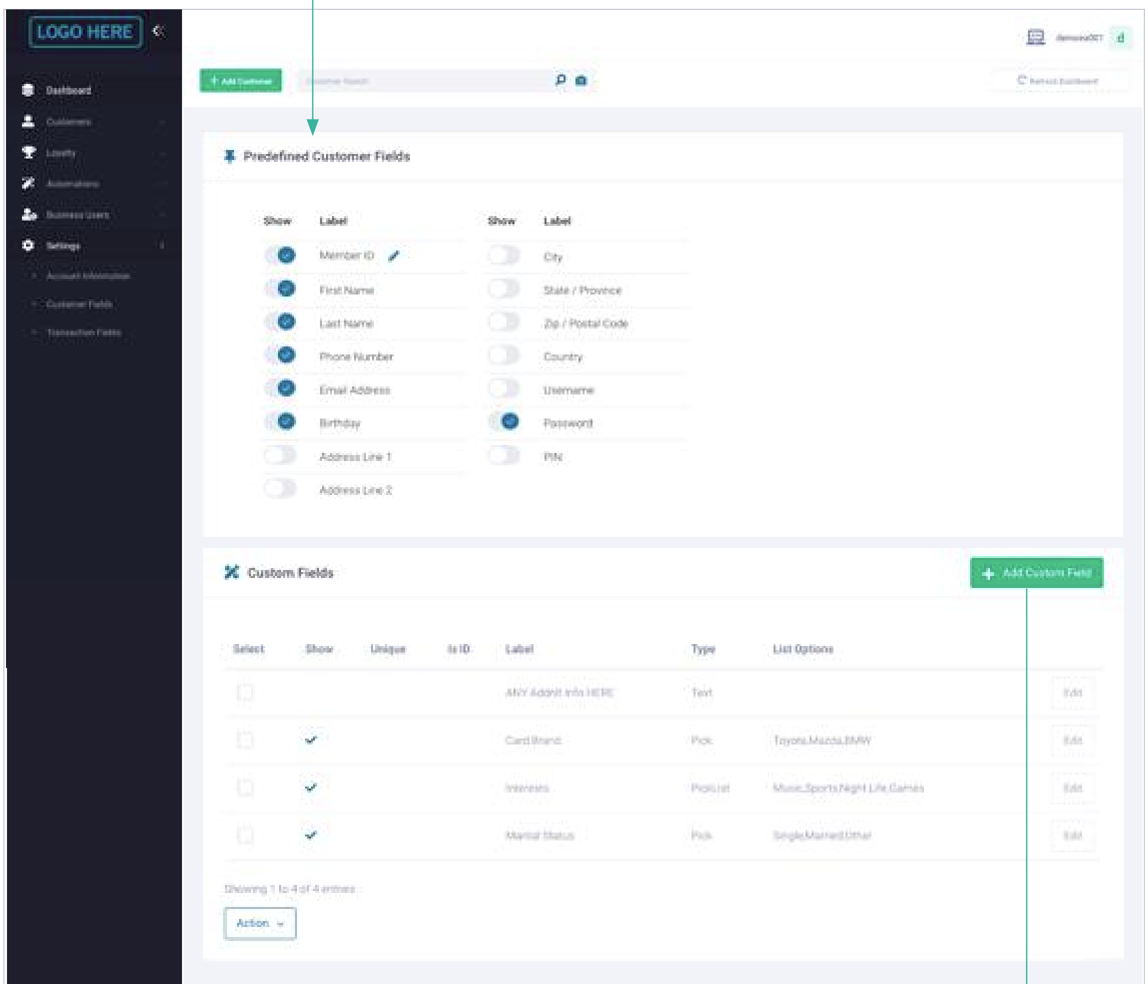
Customer Fields

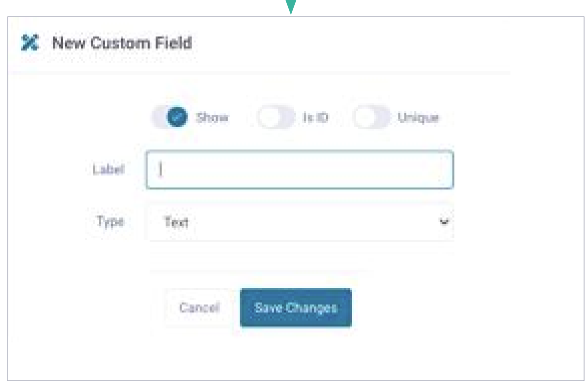
Collect from your customers the information that is relevant to your business and your marketing efforts

Predefined Customer Fields that are ready to enable and use



Create your own Custom Customer Fields

- Choose to show or not your new field on this Client Dashboard
- Create a field to use as an additional ID
- Make a field unique across your account
- Fields formats: Text, Date, List, Picklist

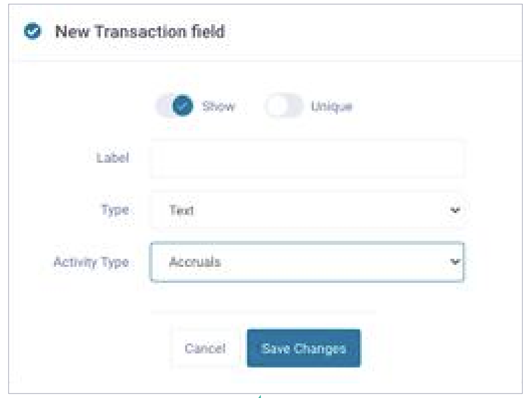


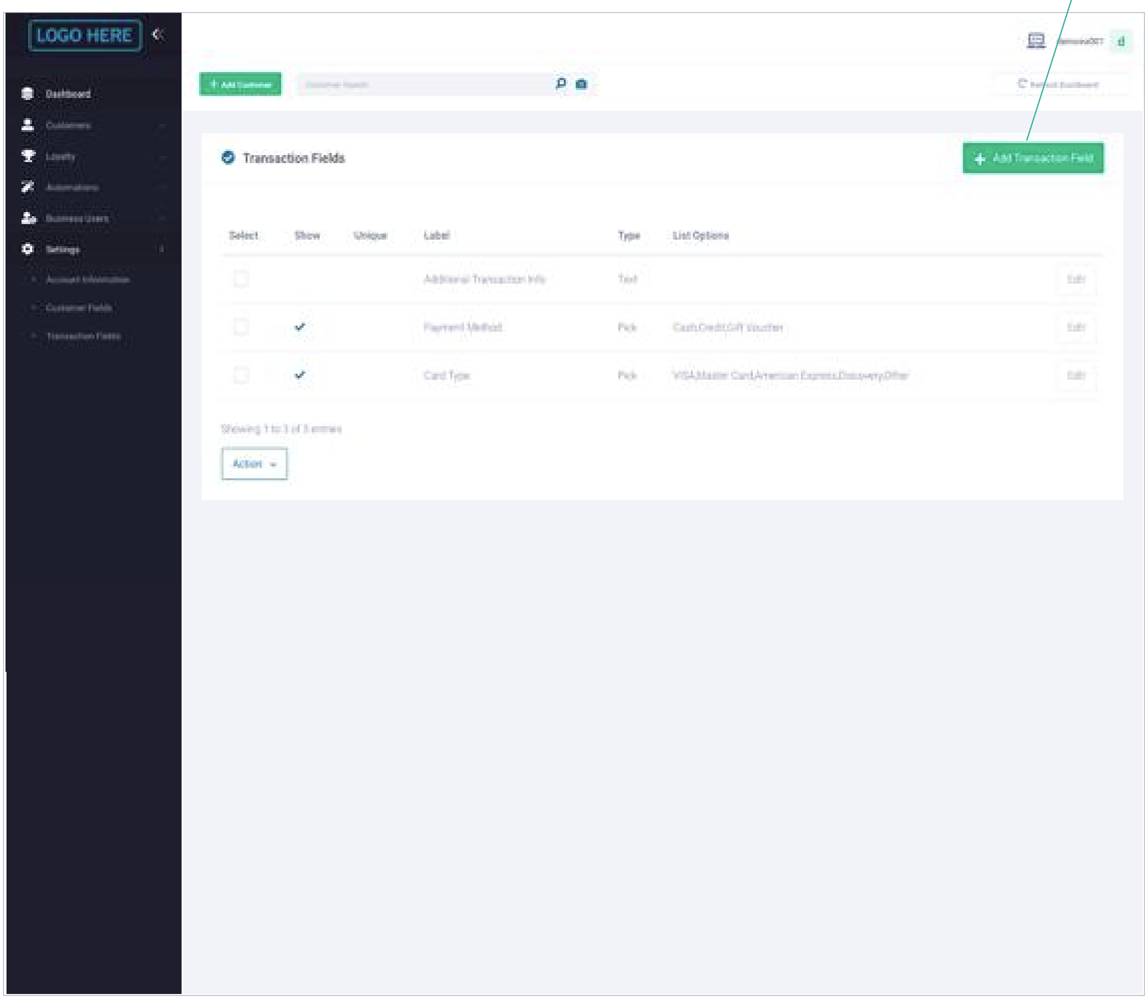
Transaction Fields

Collect the transactional data that is key to your business

Create your own Custom Transactional Fields

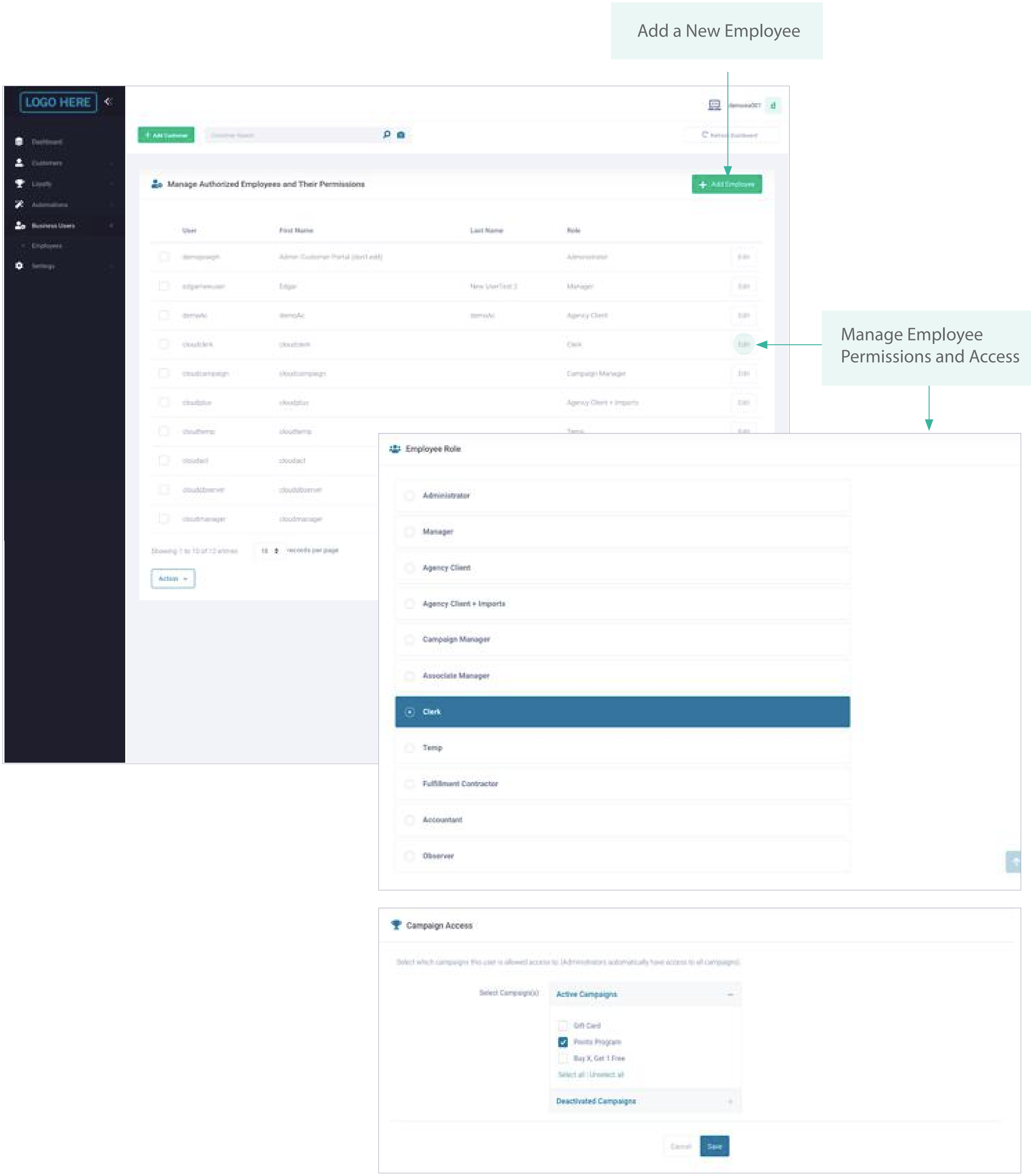
- Choose to show or not your new field on this Client Dashboard
- Make a field unique across your account
- Fields formats: Text, Date, List, Picklist
- Collect transactional data when doing the following activities: Accruals, Redemptions, All.





Employee Roles & Permissions

Control access to the loyalty program for every single employee



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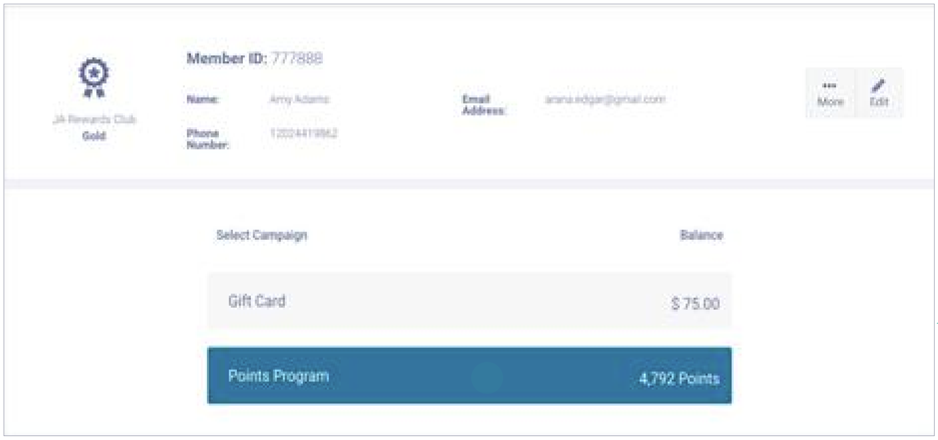
Record Customer Visits

Use this mobile responsive interface to record customer visits and redemptions

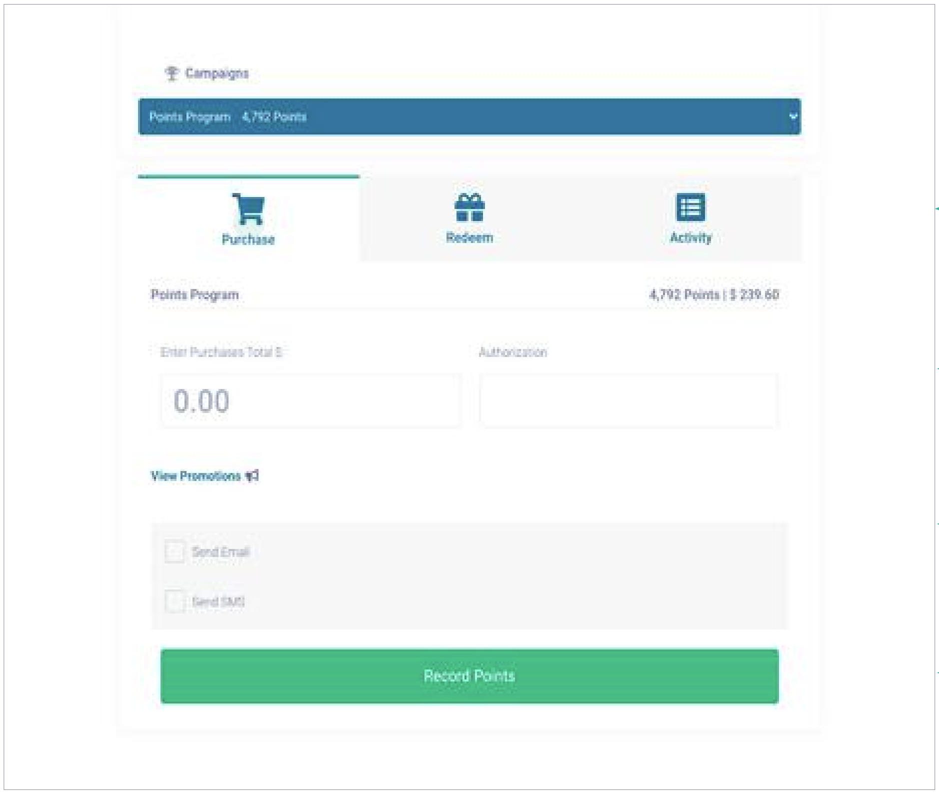
Add a New Customer

Customer Lookup

Scan Customer QR Code to find their account



Select Program Campaign



Select Action

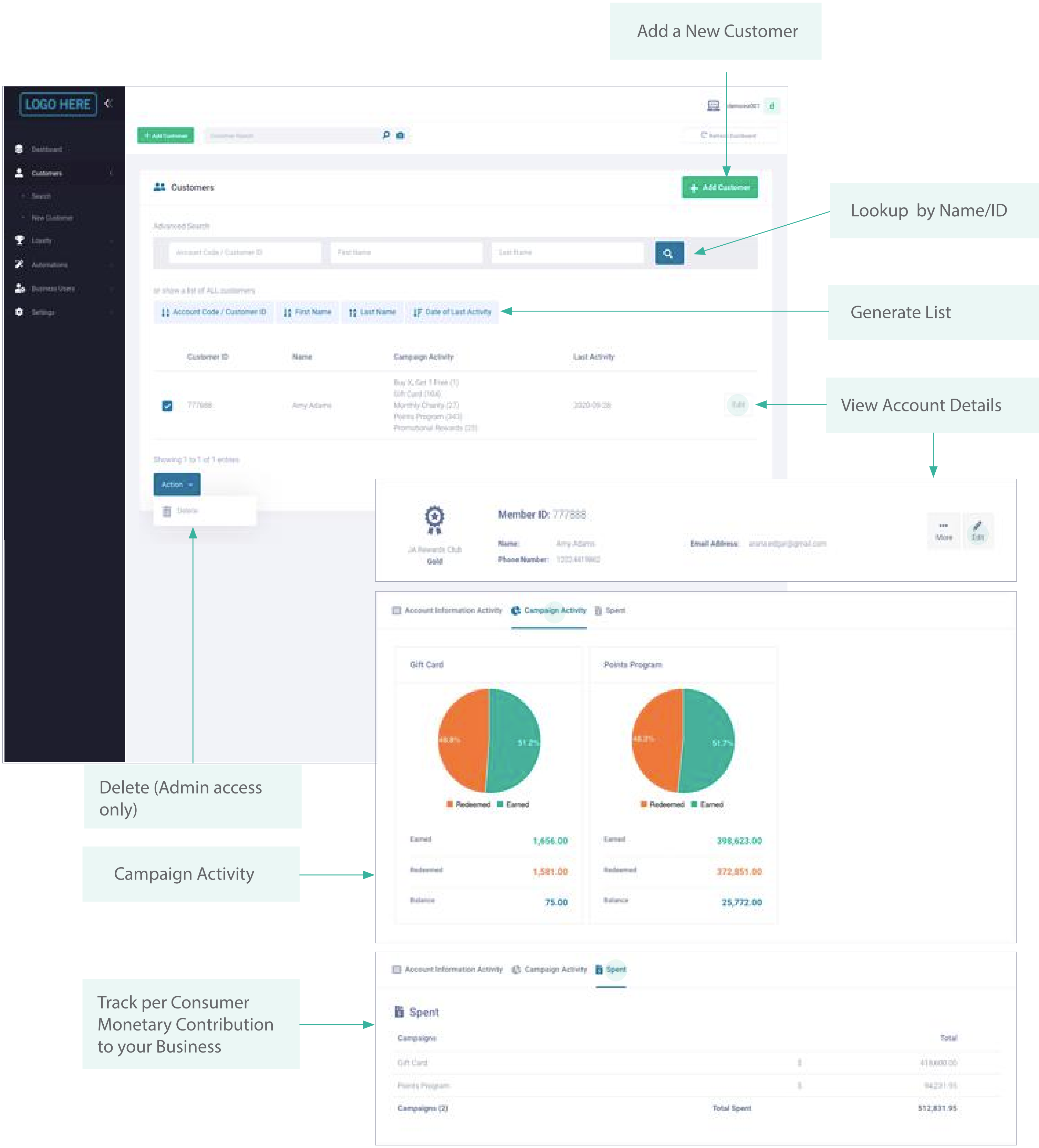
Enter Purchase Amount or select Promotion(s)

Choose to Send Transaction Email or SMS

Record Purchase or Visit

Customer Records

Manage customer records. Add, lookup, delete, edit, view account details, and track activity and monetary contribution to your business



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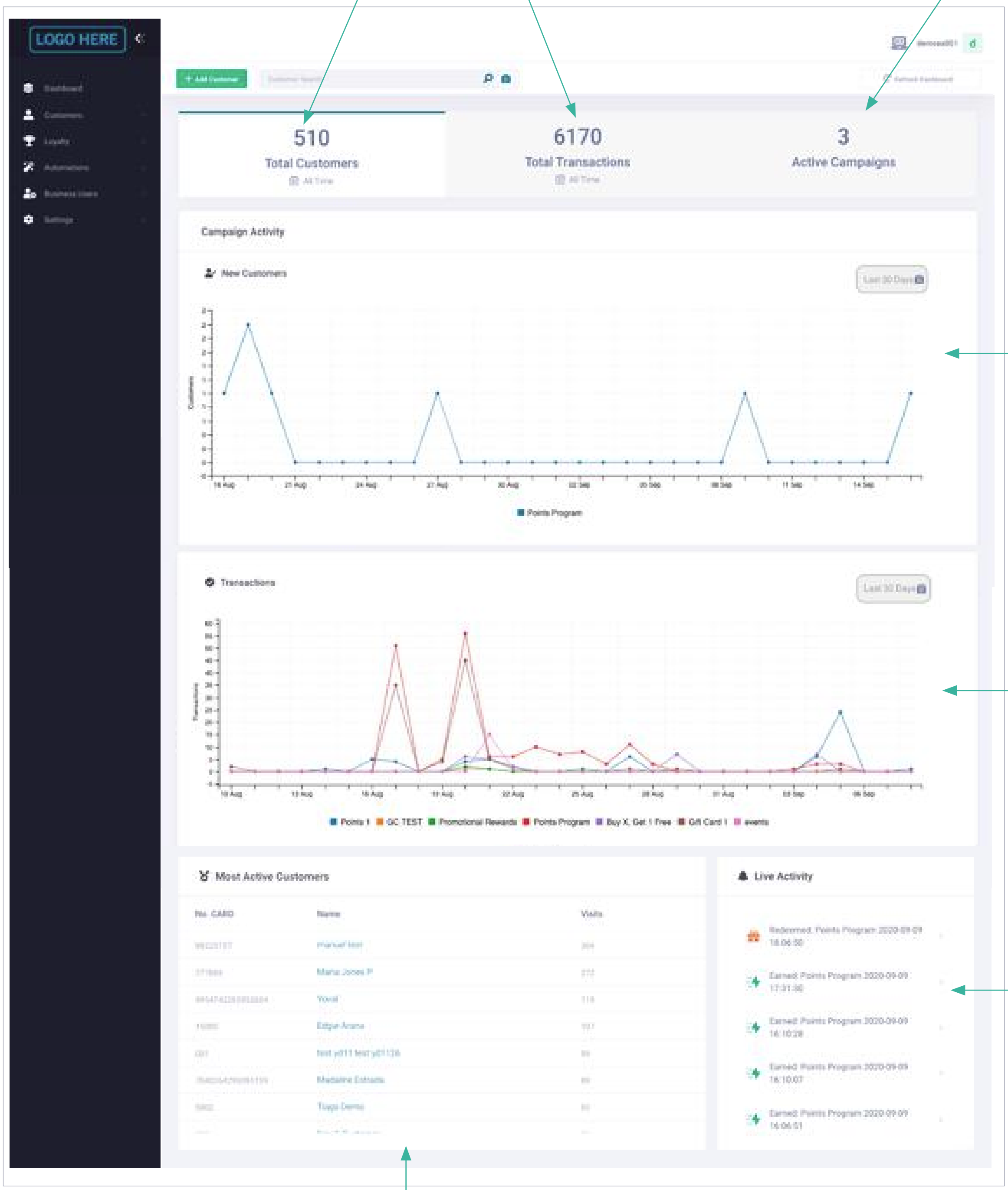
Dashboard Insights

Monitor your loyalty program performance from a single screen

Compare new customers and transactions this month vs last month

Track customer counts per active campaign in your loyalty program



New customers enrolled in your program in the last 30 days tracked per campaign

Transactions on each campaign in the last 30 days

Live feed of new customers, customer visits, and redemptions

Direct access to your top 10 customers.

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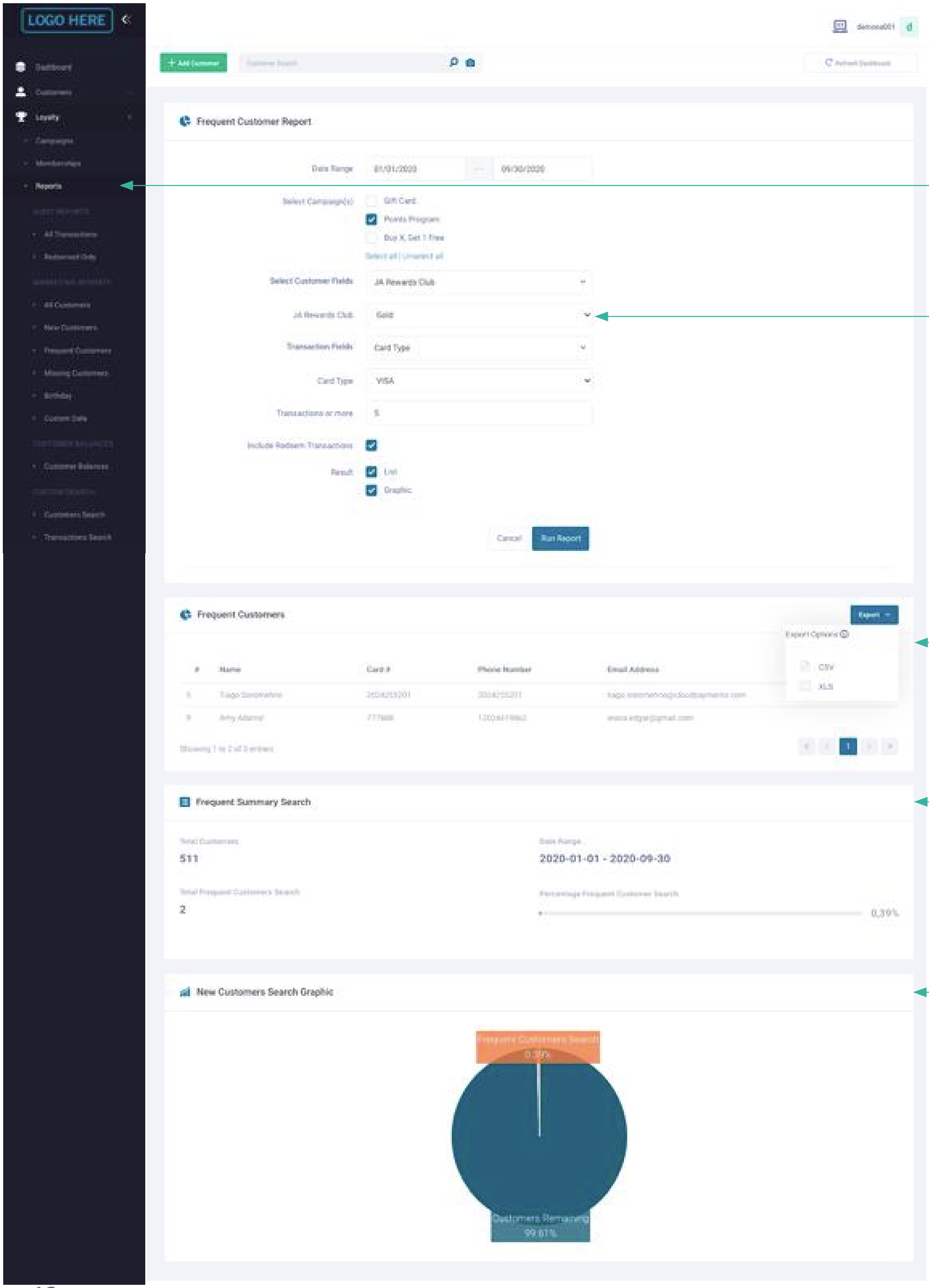
Reports and Data Export

Get the date you need to improve and enhance your loyalty program



Select Report, Dates, and Campaigns to inlcude

Include Customers and Transaction Fields to get better Customer Segments or narrow down your results

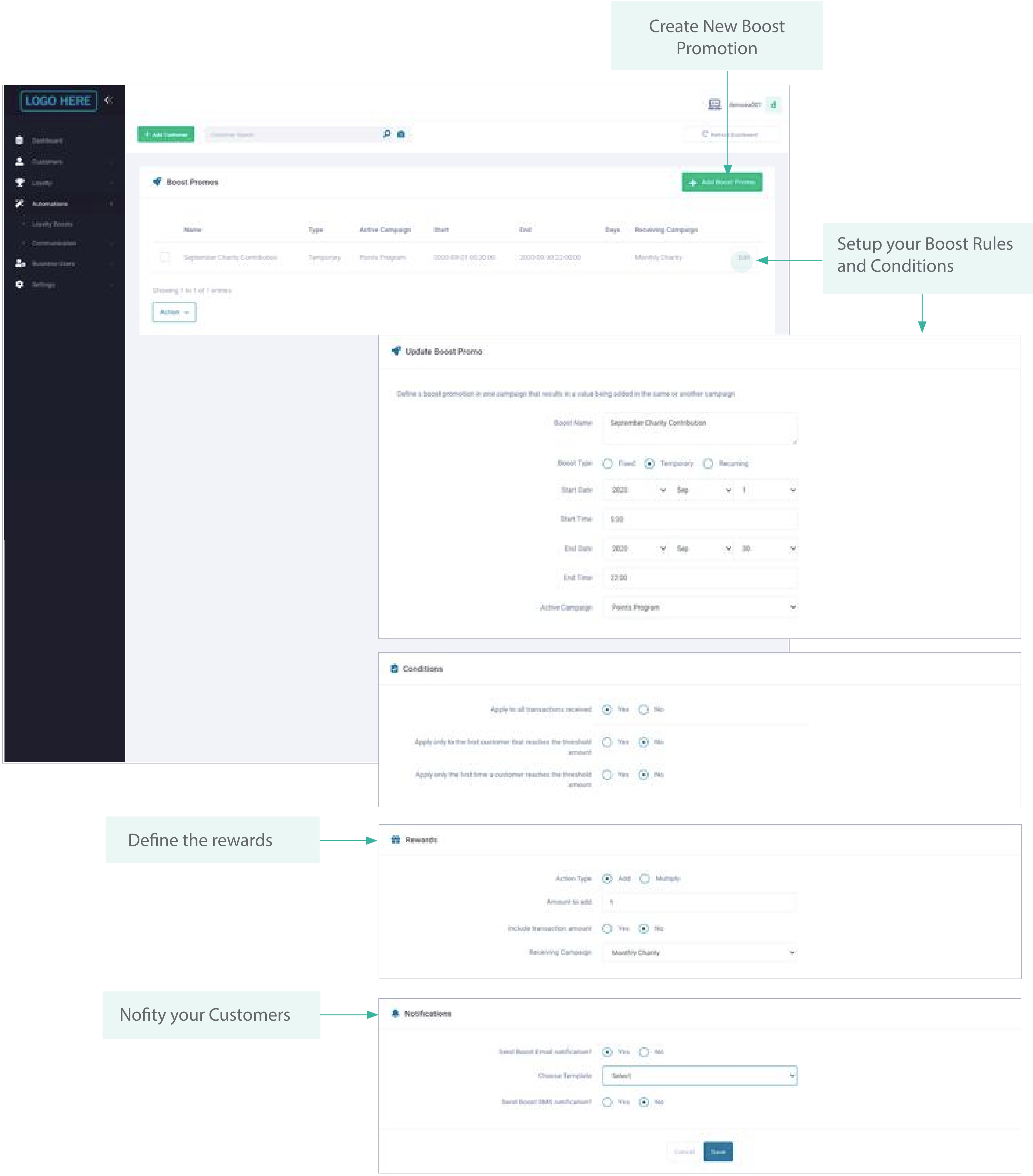
Choose to Export your list to CSV or Excel

Summary

Results Pie Chart

Boost Promotions

Automate your promtions and create incentives to drive more visits and boost your business



MILLIONS* OF LOYAL CUSTOMERS

(OK! MAYBE NOT MILLIONS, BUT LOTS AND LOTS)

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