

This Quick Reference describes how to use the Loyalty Module.

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Part 1 - Points Accumulation

In this version of the Loyalty Module, you must contact Destwin® to enable the rule or rules that will define how loyalty points are accumulated.

The basis for the rule can be anything that Destwin can track from the database. Rules can be designed to encourage certain customer behavior or spending.

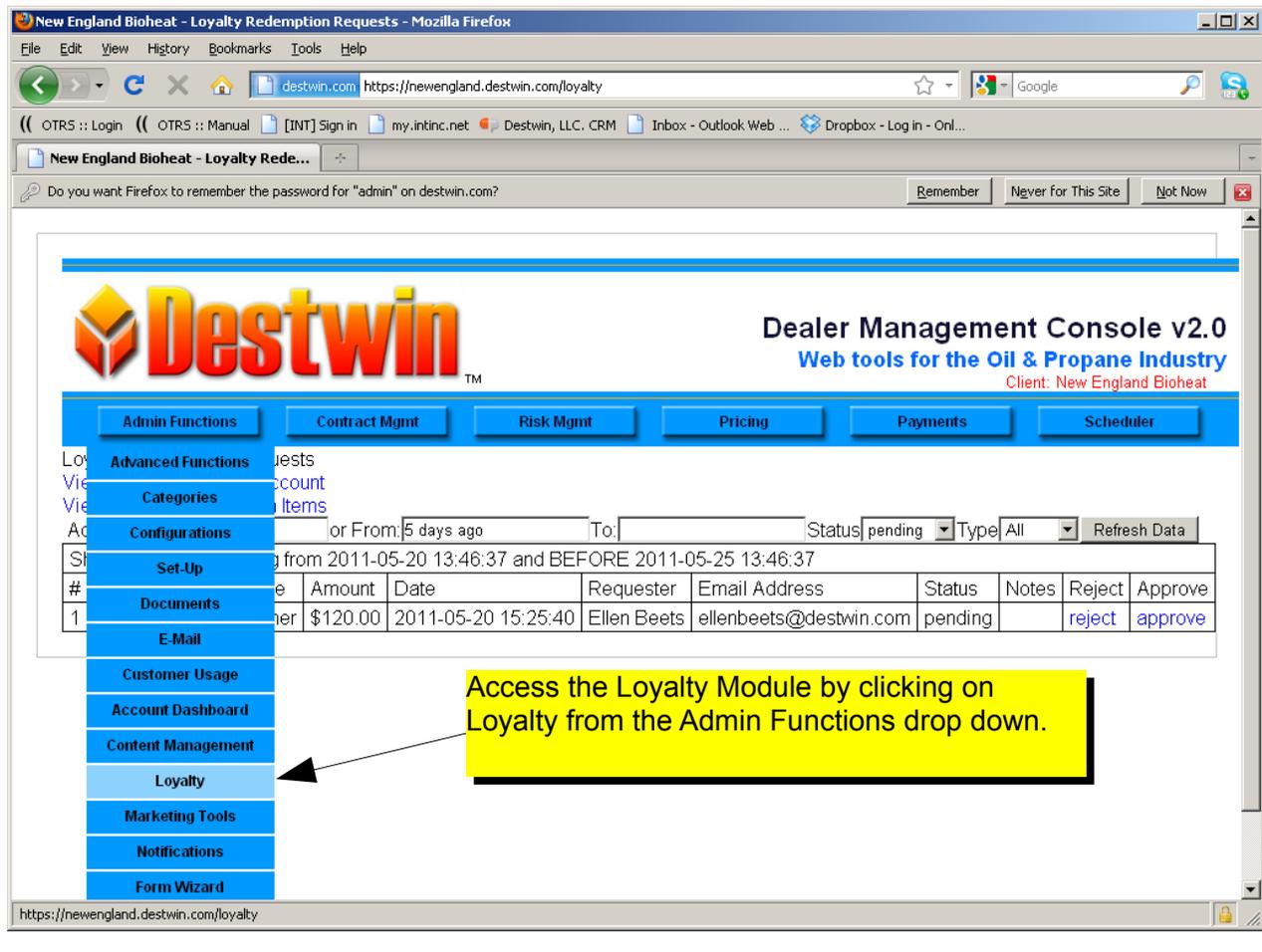
Sample Basis for Rules

- Accumulate points for each day someone is a customer.
- Accumulate points for each day a customer is on automatic delivery.
- Accumulate points for each dollar spent regardless of purchase.
- Accumulate points based on dollars spent on fuel.
- Accumulate points for each day a customer is in a service plan.
- Accumulate points for each dollar spent on a service plan.

The number of points assigned to the qualifying item or behavior is somewhat arbitrary as these points will be assigned a conversion value for each individual redemption item.

Part 2 – Points Redemption

The Loyalty Points menu is accessed from a link beneath Admin Functions.



The screenshot shows the Destwin Dealer Management Console v2.0 interface. The top navigation bar includes buttons for Admin Functions, Contract Mgmt, Risk Mgmt, Pricing, Payments, and Scheduler. The Admin Functions menu is expanded, showing options like Advanced Functions, Categories, Configurations, Set-Up, Documents, E-Mail, Customer Usage, Account Dashboard, Content Management, Loyalty, Marketing Tools, Notifications, and Form Wizard. The Loyalty option is highlighted in blue. A yellow callout box with an arrow pointing to the Loyalty option contains the text: "Access the Loyalty Module by clicking on Loyalty from the Admin Functions drop down." Below the menu, a table displays a list of redemption requests with columns for #, Amount, Date, Requester, Email Address, Status, Notes, Reject, and Approve. The first row shows a request for \$120.00 on 2011-05-20 15:25:40 by Ellen Beets, with a status of pending and options to reject or approve.

#	Amount	Date	Requester	Email Address	Status	Notes	Reject	Approve
1	\$120.00	2011-05-20 15:25:40	Ellen Beets	ellenbeets@destwin.com	pending		reject	approve

There are three primary screens within the Loyalty Module:

- Redemption Requests
- Loyalty Points By Account
- Loyalty Redemption Items

Redemption Requests

The Redemption Requests screen shows a historical record of redemption requests. By default the display shows the most recent five days. You may use the available filters at the top of the page to display more or fewer requests.

Typical Loyalty Module Summary Screen with 1 Redemption Request

Redemption Requests are summarized in the Loyalty Redemption Requests screen. Points for redemption requests are **not** applied to the account until they are approved. It is important therefore to actively monitor the log and deal with requests promptly.

A redemption request can be rejected or approved within this screen by clicking on the reject or approve columns.

Sort filters in this screen allow you to look for a specific Account, Status, or Type. You can also set the From and To date fields to view a specific time window. After entering search criteria click on the Refresh Data button to implement the search and refresh the display.

Tech Note

Notification for Loyalty Points Redemption Requests can also be sent to a specified e-mail address. This e-mail address is set through an Advanced Site Parameter (ASP). Contact Destwin to have this option enabled.

Loyalty Points By Account

The Loyalty Points By Account screen allows you to see the number of points on any given account and make Adjustments.

Use the Account Search function to look up a specific account.

Click on the Adjust Points button to adjust points for the selected account.

Loyalty Points By Account

[View Loyalty Redemption Requests](#)
[View Loyalty Redemption Items](#)

Account

Acc	Customer Name	Establishment?	Last Update	Balance (lp)	Adjust Points
35524	AARON EISENBARTH	2008-12-29	2011-11-07 18:19:51	20921	<input type="button" value="Adjust Points"/>
36570	AARON HSU	2008-12-29	2011-02-07 16:28:20	17700	<input type="button" value="Adjust Points"/>
35994	AARON OYSTON	2008-12-29	2010-09-10 11:18:10	6190	<input type="button" value="Adjust Points"/>
31848	AARON SHELOR	1995-03-05	2010-09-10 11:17:51	66670	<input type="button" value="Adjust Points"/>

Top of Loyalty Points By Account screen.

To make an adjustment to an account, click on the **Adjust Points** button for that account. An edit box will appear. Make an entry with a mathematical operator (+ to add, - to subtract) with the desired number of points and click on the **Save** button to apply and save the adjustment or the **Cancel** button to exit without saving. For example, to add 79 points to account 35524, enter +79.

Loyalty Points By Account

[View Loyalty Redemption Requests](#)
[View Loyalty Redemption Items](#)

Account

Acc	Customer Name	Establishment?	Last Update	Balance (lp)	Adjust Points
35524	AARON EISENBARTH	2008-12-29	2011-11-07 18:19:51	20921	<input type="button" value="Adjust Points"/> <input type="text"/> <input type="button" value="Cancel"/> <input type="button" value="Save"/>
36570	AARON HSU	2008-12-29	2011-02-07 16:28:20	17700	<input type="button" value="Adjust Points"/>
35994	AARON OYSTON	2008-12-29	2010-09-10 11:18:10	6190	<input type="button" value="Adjust Points"/>

Loyalty Points with adjustment box open

Adjusted Loyalty Points value after adding 79 (+79) points to account 35524.

Loyalty Points By Account

[View Loyalty Redemption Requests](#)
[View Loyalty Redemption Items](#)

Account

Acc	Customer Name	Establishment?	Last Update	Balance (lp)	Adjust Points
35524	AARON EISENBARTH	2008-12-29	2012-01-14 12:21:59	21000	<input type="button" value="Adjust Points"/>
36570	AARON HSU	2008-12-29	2011-02-07 16:28:20	17700	<input type="button" value="Adjust Points"/>
35994	AARON OYSTON	2008-12-29	2010-09-10 11:18:10	6190	<input type="button" value="Adjust Points"/>

Loyalty Points after adjustment to account 35524

Loyalty Points Redemption Items

Destwin generally pre-populates the system with sample redemption items. Generally redemption items fall into one of three categories, items or services you sell like fuel or service, items that would be redeemed through third party merchants like a coupon at a local restaurant, and charitable contributions. In the case of third party merchants you would need to make appropriate arrangements with the merchant.

Redemption items appear in the customer portal and are set up in this section of the Admin portal.

Admin Functions
Contract Mgmt
Risk Mgmt
Pricing
Payments
Scheduler

Loyalty Redemption Items

[View Loyalty Points by Account](#)
[View Loyalty Redemption Requests](#)
[Add New Redemption Item](#)

#	Type Code	Units	Units Per Point	Fixed Points Per Unit	Min Units Needed	Max Units Applicable	Max Points Applicable
1	hvac	money	\$0.008	n/a	\$0.00	\$10,000.00	100000
2	silver	months	n/a	4000	0	0	0
3	charity	money	\$0.001	n/a	\$0.00	\$0.00	0
4	dinner	money	\$	5000	\$0.00	\$0.00	0

Sample Redemption Items

Product or Service	Description	Points Value	Apply Points
	Apply to any future purchase of high efficiency heating and cooling equipment from major name brands such as Carrier, ThermoPride and many others will provide years of savings and improved reliability.	\$168.00	[Apply Points]
	This service plan provides comprehensive coverage of most major heating components. It also provides a comprehensive 24 hour support plan as well as an all-inclusive annual energy efficiency tune-up.	5 months FREE extension	[Apply Points]
	Redeem your points to benefit our local kids with a donation made in your name. [click for more info]	\$21.00	[Apply Points]
	Redeem your points for a night out on us! Taylor's Pub offers excellent food and entertainment and is known throughout the Lakes Region.	\$40	[Apply Points]

Sample Customer Portal View of Redemption Items

hvac (equipment)

silver (service)

Link field – see page 7 below.

charity (charity)

dinner (third party merchant)

Description field – see page 7 below.

Image field – see page 7 below.

Name field – see page 7 below.

Admin Functions Contract Mgmt Risk Mgmt Pricing Payments Scheduler

Loyalty Redemption Items

View Loyalty Points by Account
View Loyalty Redemption Requests

[Add New Redemption Item](#)

#	Type Code	Units	Units Per Point	Fixed Points Per Unit	Min Units Needed	Max Units Applicable	Max Points Applicable
1	hvac	money	\$0.008	n/a	\$0.00	\$10,000.00	100000
2	silver	months	n/a	4000	0	0	0
3	charity	money	\$0.001				0
4	dinner	money	\$				0

Sample Redemption Items

To add a new item, click on the Add New Redemption Item link. This will open an edit screen like the one shown below except that it will be empty.

To set up or edit an item, click on that item's **Type Code** field, e.g. to edit the **hvac** item, click on the **hvac** link. This will open a new window to an edit screen.

New England Bioheat - Loyalty Redemption Item

destwin.com https://newengland.destwin.com/redemptionitem?action=edit&code=

Loyalty Redemption Item

Code: hvac (no spaces or special characters)

Units: money

Units Per Point: 0.008

Points to Reach 1 Unit: 0

Minimum Units Allowed: 0

Maximum Units Allowed: 10000

Maximum Points Allowed: 100000

Name: High Efficiency Heating &

Description: Apply to any future purchase of high efficiency heating and cooling equipment from major name brands such as Carrier, ThermoPride and many others will provide years of

Link:

Image: hvac_thumb [Add/Choose Image](#)
[View assigned thumbnail](#)

Display Order: 0

The **Code** field is a unique identifier for the redemption item. It is not displayed to the customer.

The **Units** field controls what type of units are displayed on the Customer redemption page. The three options are:
money – for those items that will display a dollar value e.g. purchase of equipment that you sell or a charitable donation.
months – for those items that have a time value, e.g. service plan extension.
cents – for those items that require a display in cents, e.g. price per gallon on a fuel purchase.

Redemption Item Edit Screen

Units Per Point sets the conversion factor for units to points. For example, if set to .008 as shown, 10,000 points will convert to 80 units ($0.008 * 10,000$). depending on the units selected this would translate as follows:
money: \$80.00
months: 80 months
cents: 80 cents (\$0.80)

Points to Reach 1 Unit sets the number of points necessary to obtain 1 unit. For example, this field would usually be used to set a specific point limit required to achieve 1 month extension on a service plan.

Minimum Units Allowed sets a minimum number of units (if desired) before a value for this item will be displayed in the customer portal.

Maximum Units Allowed sets a maximum number of units (if desired) that may be allowed for this item.

Maximum Points Allowed sets a maximum number of points (if desired) that may be allowed for this item.

Name sets the title for the item that will appear in the customer portal, see page 5 above.

Description sets the description for the item that will appear in the customer portal, see page 5 above.

Link may be used to specify a link to another web page that can be clicked on to take the customer to this page that provides additional information about the item, see page 5 above.

The **Add/Choose Image** link is used to upload an image for the item, see page 5 above.

The **Display Order** field sets the location of the item on the customer portal page, lowest numbers at the top.

The **View assigned thumbnail** link is used to view the current assigned image for the item, see page 5 above.

You must click on the **Submit** button for new entries or edits to existing entries to take effect.

Tech Note
 When planning your items, you can tell Destwin that loyalty points may be capped at a given value.

Loyalty Redemption Item

Code	hvac (no spaces or special characters)
Units	money
Units Per Point	0.008
Points to Reach 1 Unit	0
Minimum Units Allowed	0
Maximum Units Allowed	10000
Maximum Points Allowed	100000
Name	High Efficiency Heating & Cooling
Description	Apply to any future purchase of high efficiency heating and cooling equipment from major name brands such as Carrier, ThermoPride and many others will provide years of
Link	
Image	hvac_thumb Add/Choose Image View assigned thumbnail
Display Order	0
	<input type="submit" value="Submit"/>

Redemption Item Edit Screen

Part 3 – Samples

Accumulate points for each day someone is a customer

Basic Rule – accumulate 10 points per day for each day a customer is an active account starting from the Start Date in the database.

Sue Destwin has been a customer since January 1, 2002

At January 1, 2012 she will have been a customer for 10 years and will have accumulated roughly 36,500 points (365 days per year * 10 years * 10 points per day).

Redemption items:

Equipment we sell

Units: money

Units Per Point: .005 (this converts to \$18.25 per year; 3,650 points per year * .005 = \$18.25)

In this example we are willing to appropriate \$18.25 per year towards the purchase of equipment.

Extend months on a service plan

Units: months

Points to reach 1 unit: 7,500

This translates approximately to 1 “free” month of service plan extension for every 2 years someone is on a service plan.

*This rule could be set to a specific start date for everyone, e.g. January 1, 2002 such that no customer would start with more than 36,500 points.

Accumulate points for each dollar spent on fuel

Basic Rule – accumulate 10 points per dollar for each dollar a customer has spent on fuel for the past three years and going forward.

Sue Destwin has spent the following:

2009... \$4,000

2010... \$4,500

2011... \$5,000

Total... \$13,500

Total Points... 135,000

Redemption items:

Equipment we sell

Units: money

Units Per Point: .0005 (this converts to \$67.50 per \$13,500.00 spent on fuel or \$0.005 for every \$1.00)

Further explanations on calculations money and months as units.

Assume 10 points per day for a customer 365 days in a year - 3650 points per year

Using money for units:

Charity, Equipment, Cap Fee, (anything that you can convert to money)

If you set:

Units: money

Units Per Point: 0.003

Points to Reach 1 Unit: 0

Minimum Units Allowed: 0

Maximum Units Allowed: 50000

Maximum Points Allowed: 0

You will have a situation where in one year a customer will have accumulated \$10.95 of charitable contribution calculated as follows:

$3650 \text{ points in one year} * 0.003 \text{ units per point} = \10.95

If you increase the Units Per Point, you will increase the redemption value of the points:

$3650 \text{ points} * 0.005 \text{ units per point} = \18.25

Using months for units:

Service Plans

If you set:

Units: months

Units Per Point: 0

Points to Reach One Unit: 3650

Minimum Units Allowed: 0

Maximum Units Allowed: 12 (to limit to one year)

Maximum Points Allowed: 0

You will have a situation where for each year a customer remains loyal they can redeem one month of service at no charge calculated as follows:

$3650 \text{ points in one year} / 3650 \text{ points for 1 month} = 1 \text{ month}$

If you increase the Points to Reach 1 Unit you will decrease the value of the points:

$3650 \text{ points in one year} / 5000 \text{ points for 1 month} = .73 \text{ months}$. The effect of this is that a customer has to reach 5000 points before they can redeem one month of service and it would take them 5000 days (approximately 16 months) to reach these points.