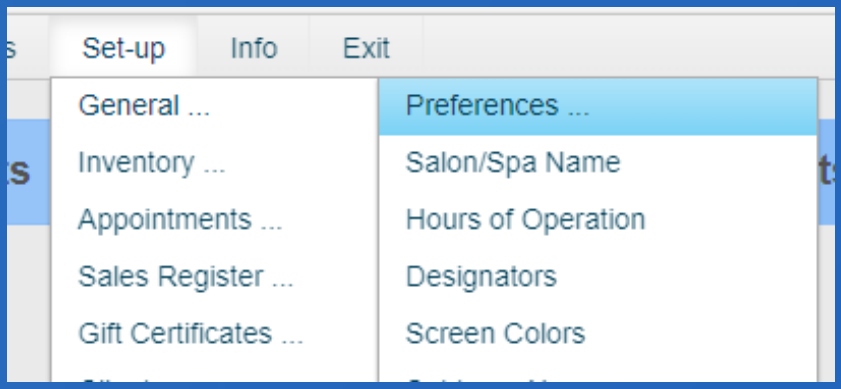
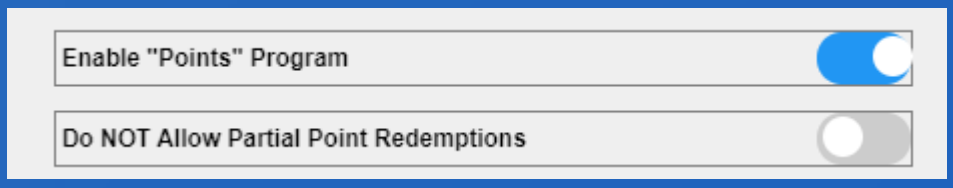
Points Earnings for Services

Please note that each points earning "class" runs simultaneously with any others you may create. For this reason, you must not create conflicting classes. Each class should focus on its own unique earnings for gift certificates, packages, series, services, retail, or referrals.

1. From the main screen select Setup/General/Preferences.

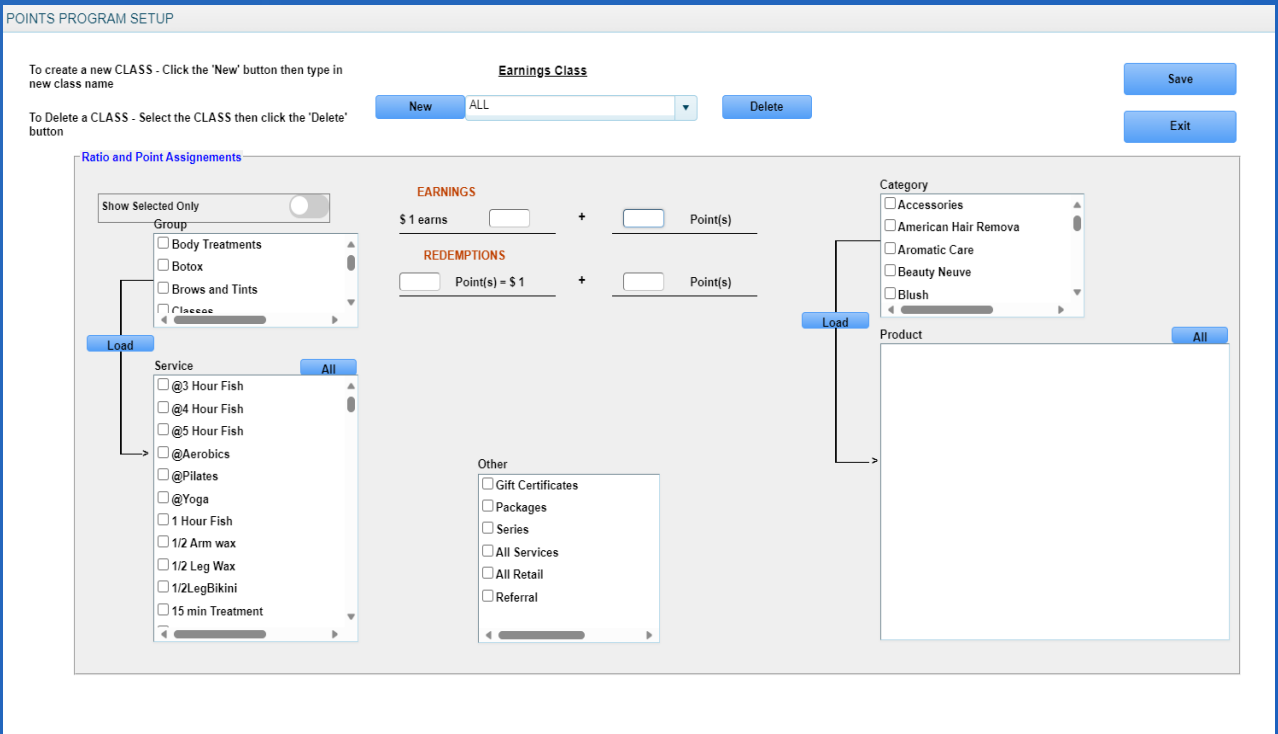


2. Select and Activate ‘Enable “Points” Program’

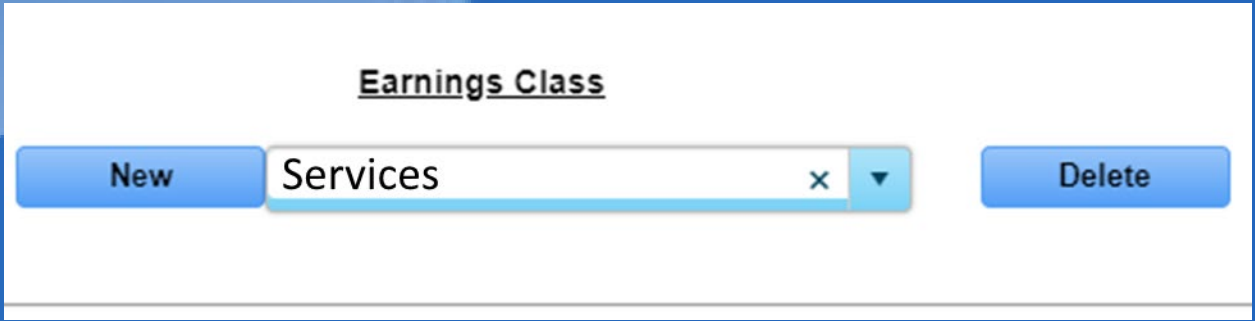


3. You may choose to activate “Do NOT Allow Partial Point Redemptions as well. However, that is not required. Briefly, this selection means that if the customer has not earned enough “points” to get the product or service for “free” then they may not use their points at all. If however, you DO allow Partial Point Redemptions, your customers may use just some of their points to receive a discount.

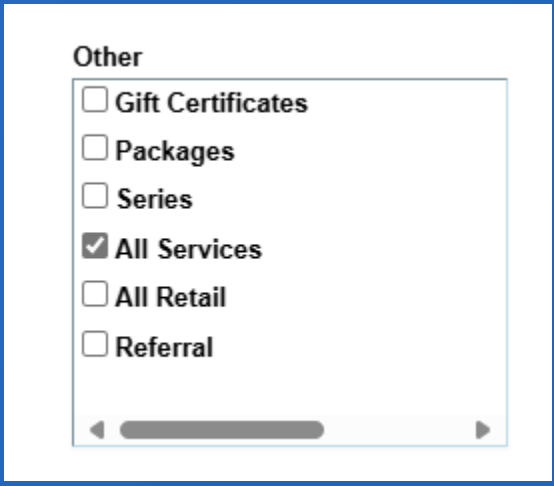
4. Upon activating “Enable Points Program” the following screen appears



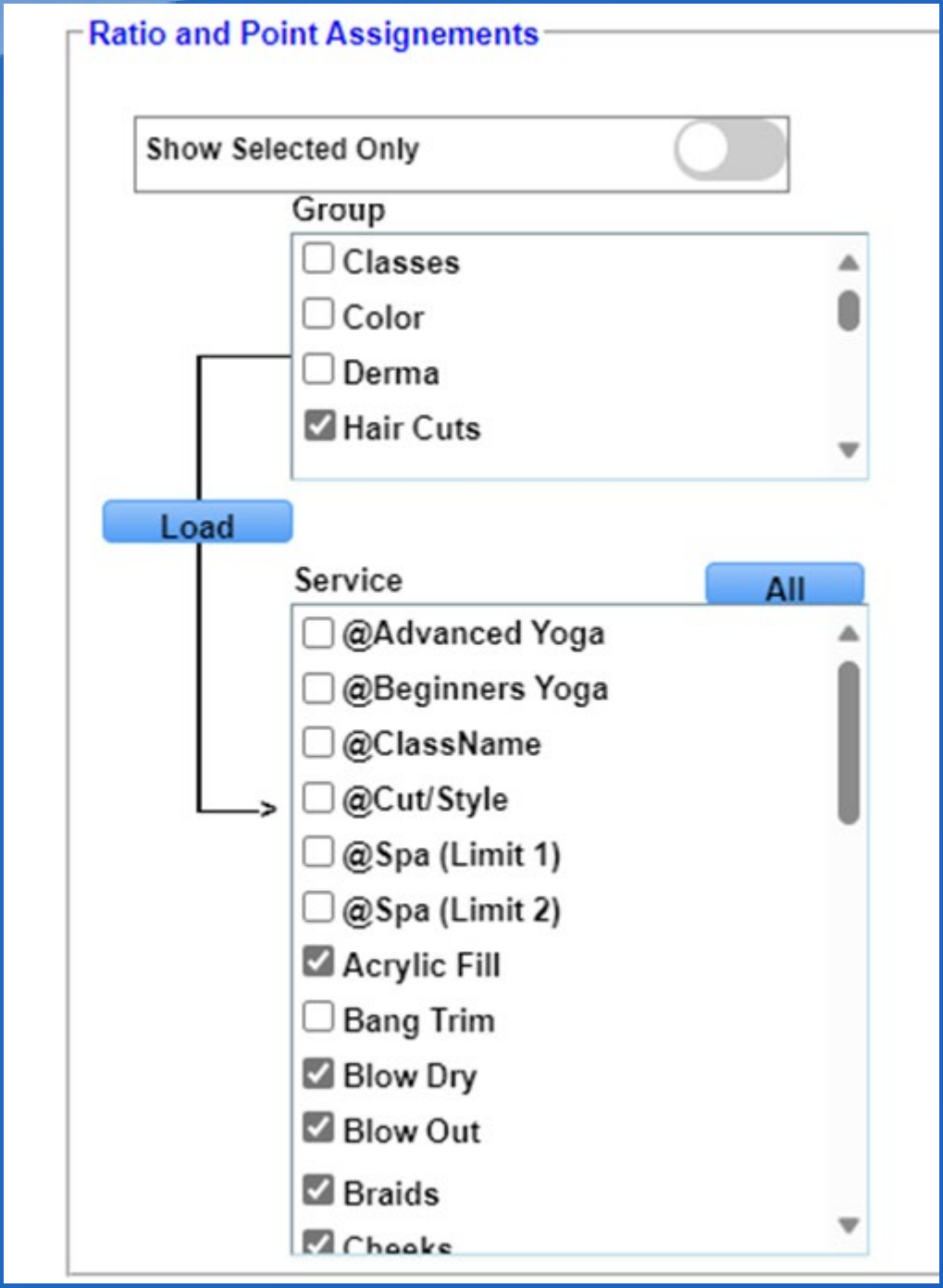
5. To Create a new points earnings “class” click “New” then type in the name of your class. (Your customers will not see these class names, these are for your information and can be named anything at all.)



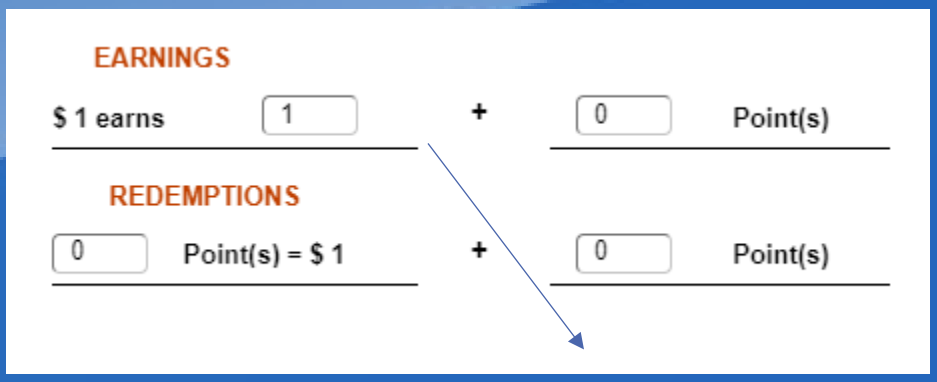
6. After entering the name of the new earnings class (we used the name “Services” for the new class) you will then select which items this particular class will affect. You do this by placing a check mark in the box next to the items you wish to be affected by this class in the “Other” box. In this lesson we will just select “All Services”



7. To the left of the “Other” box you will see a list of the groups and services you offer. Place a check next to the group or groups you would like to work with and then press “load” and the services from those groups will appear. You will place a checkmark in the box to the left of the service name that you would like this earnings class to apply to. Or you can select “All”



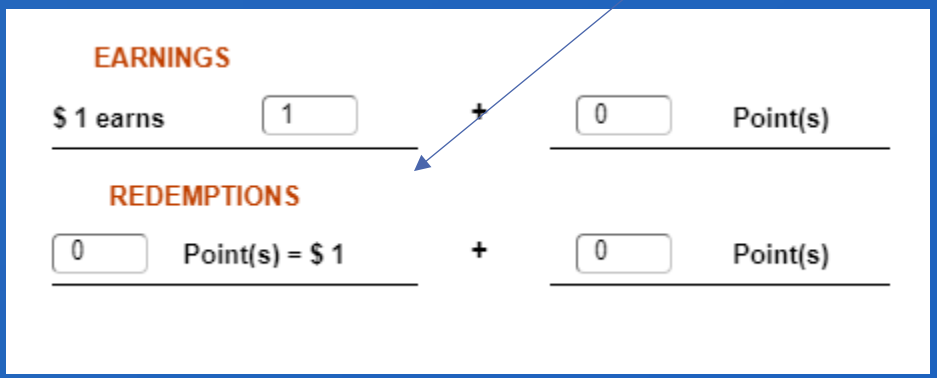
8. Once you have selected the services you wish to include in this points program, you will then move to the right center of the screen and use the following:



Here you will enter the number of points a single spent dollar will earn the customer on the services you have selected. Then, you may enter additional points earned as well.

The number after the plus "+" sign will be additional points earned that don't require dollars spent. For example, if this was for a referral, you could have $1 = 0 and "+" = 50. This would give the customer 50 points for a referral that they, obviously, did not spend any money on.

9. Below the "Earnings" detail we have the "Redemptions" detail. In this box you will place how many points will equal "=" a dollar. For example, you may have $1 = 1 point but 20 points = $1. This means the customer spending $20 would earn 20 points, and could redeem those 20 points for a single dollar's worth of value in your business.



10. Click ‘Save’ in the top right corner.

A client cannot earn points until they are a part of a membership. Please read our tutorial on creating a membership.