



Date: 2/16/24  
Author: Kevin Van Ausdal

### **Frequently Asked Question:**

What sort of rewards programs can be set up in SunLync.

**From:** Clients new or old to SunLync.

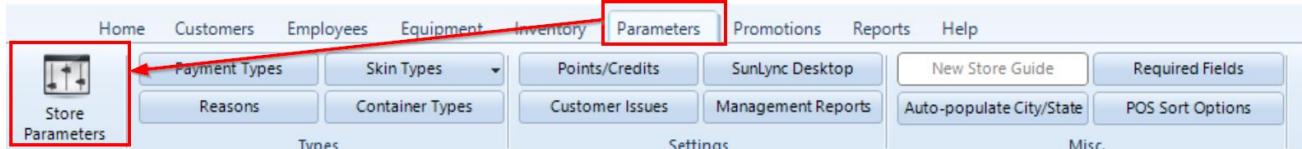
**To:** Clients new or old to SunLync that would like walked through how to set up a rewards program.

### **Answer/Resolution:**

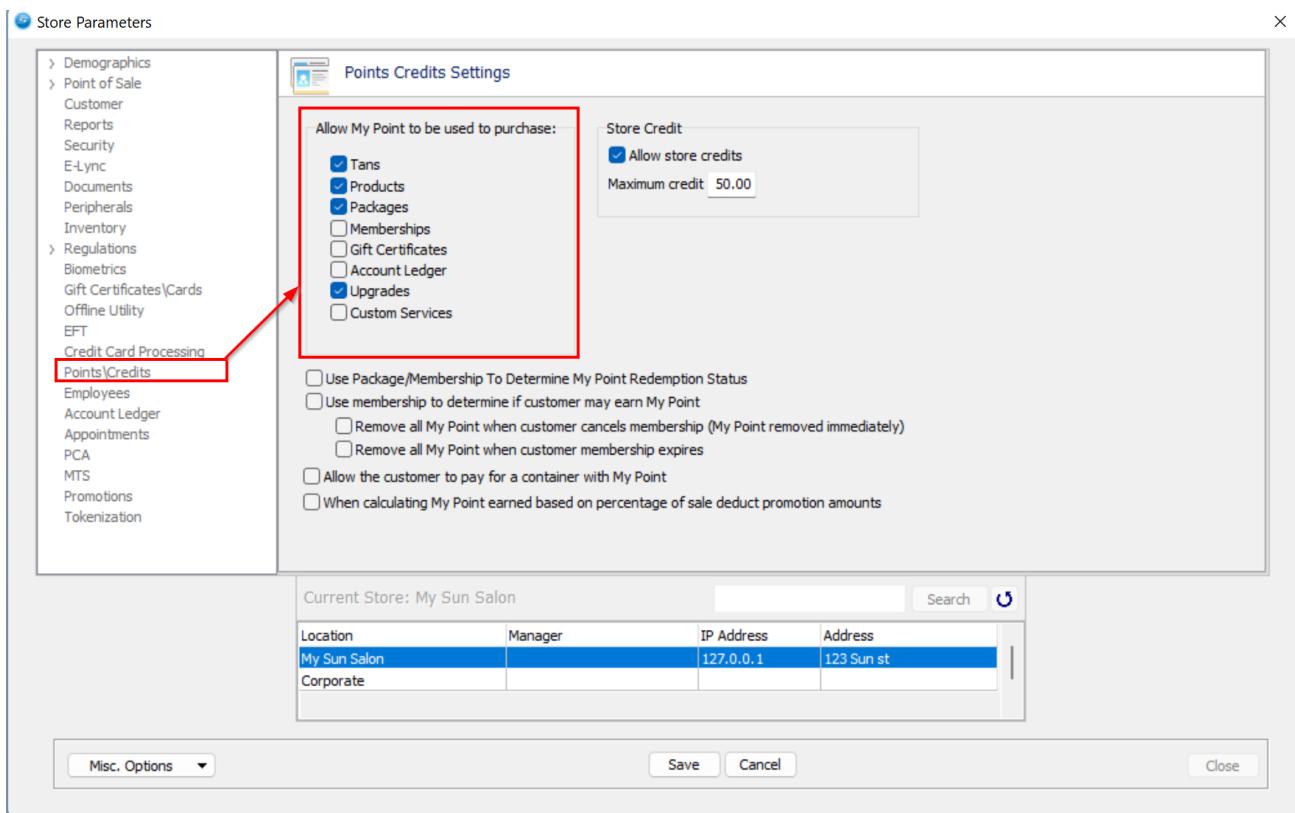
This document outlines a few ways you can configure SunLync to provide your clients incentives to be repeat customers. Along with ways of rewarding them for referring new customers to your salon.

## **1. Initial Configuration**

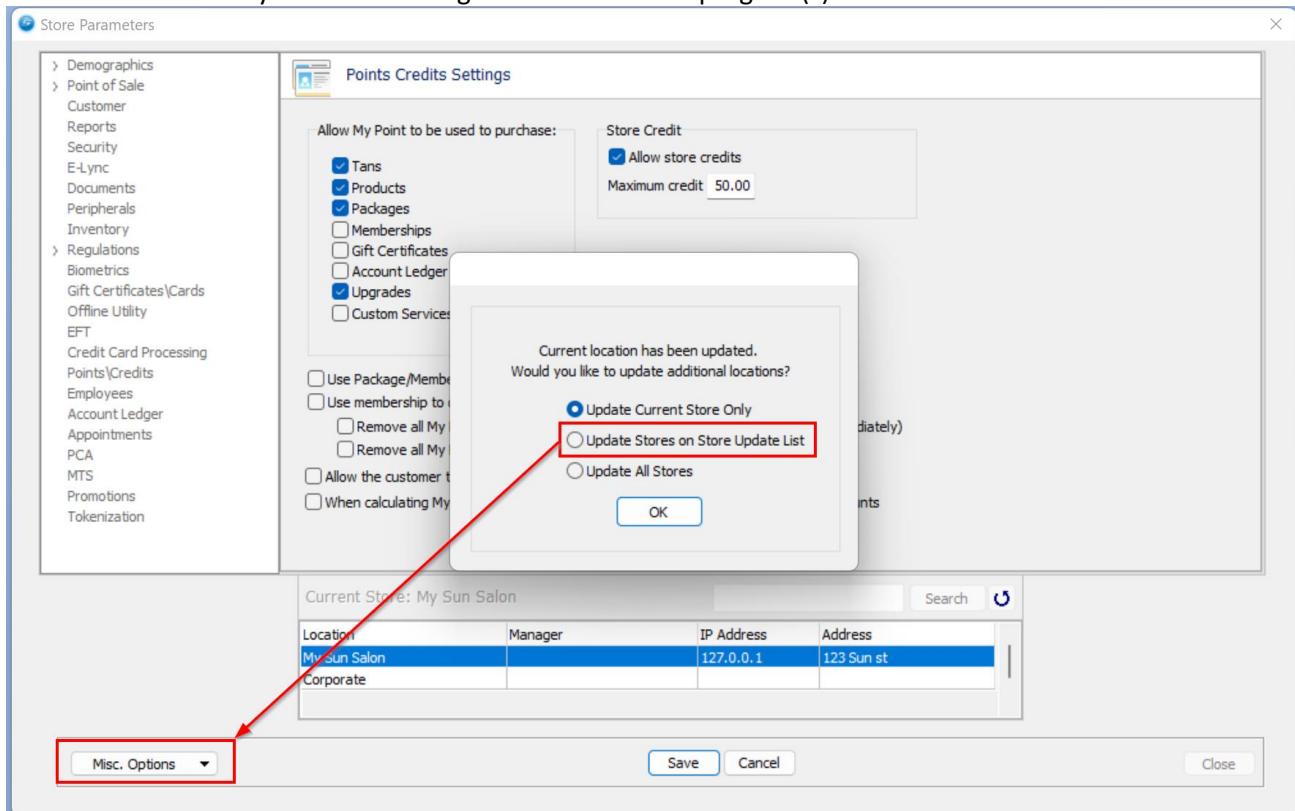
First, we must set the foundation of our rewards program(s). In Back Office we first need to go to the Parameters tab and select Store Parameters.



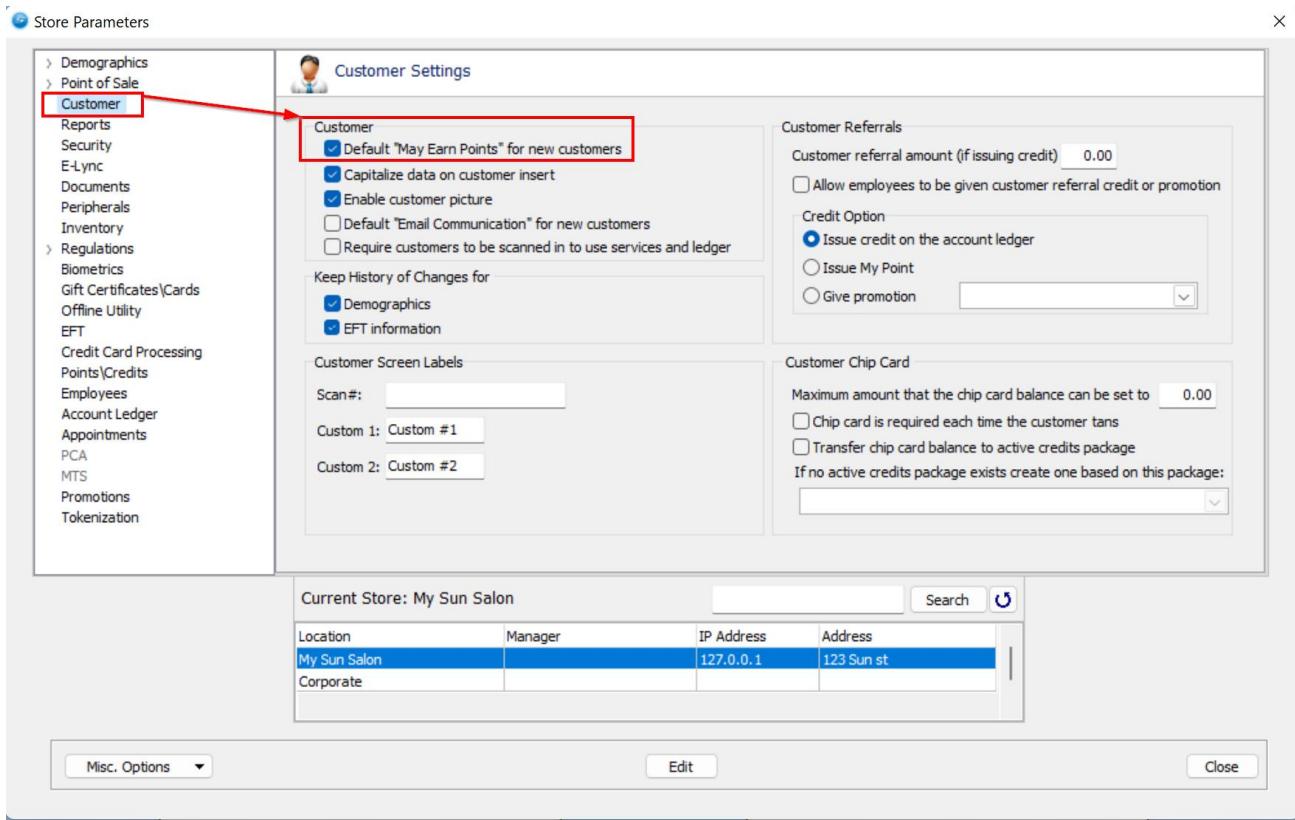
Under Points/Credits we will want to make sure we checkmark all products and services customers can purchase with points. Below that, there are some extra settings that allow you to control the stipulations that allow a customer to earn points. For example, requiring specific packages and memberships for eligibility (more details in section #2). Along with, reducing the points a customer earns when they are getting a discount on their purchases.



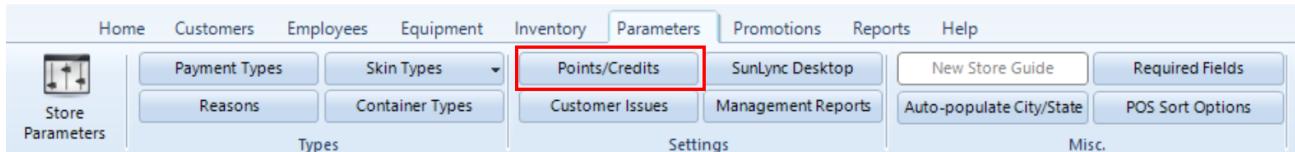
These settings are store specific. You can save your changes to the specific store you have highlighted. You can make a list of stores you want to make updates for (under Misc. Options) or you can update All Stores at once if every location is doing the same rewards program(s).



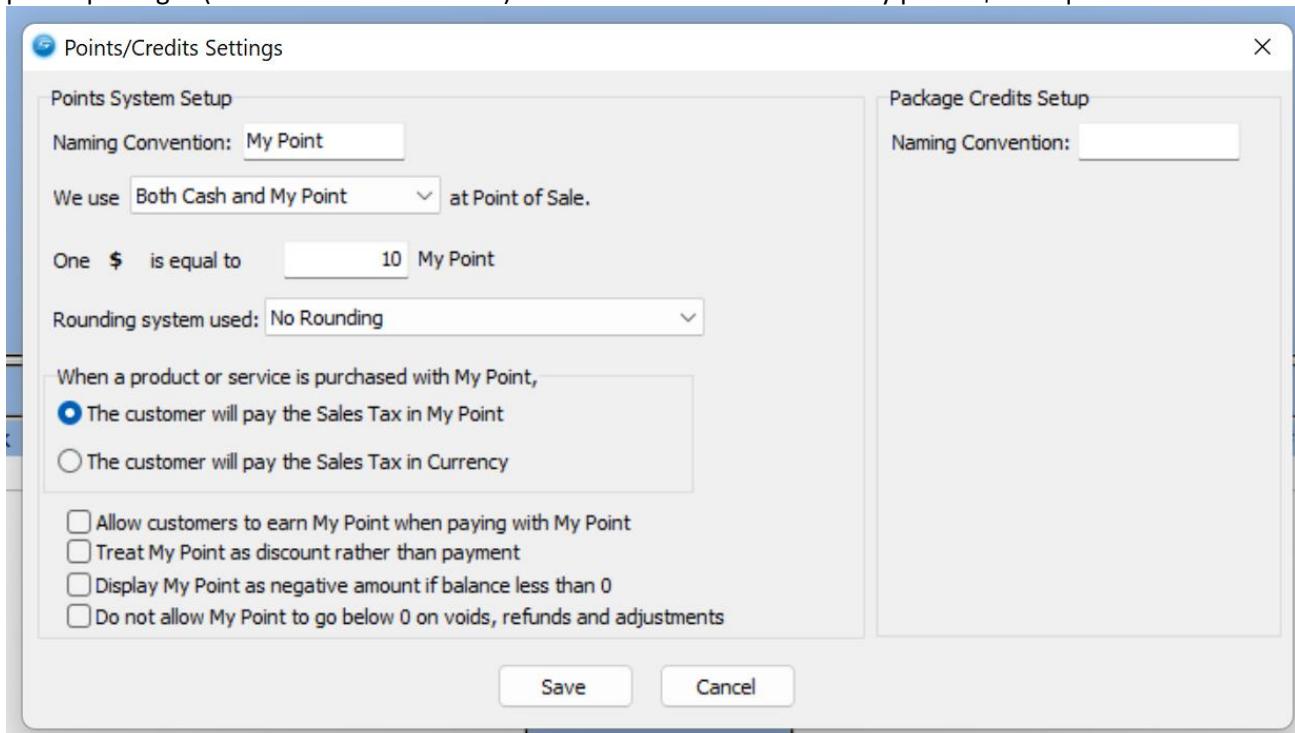
While under the Store Parameters page. You may also want to go to Customer and default customers to be opted into points.



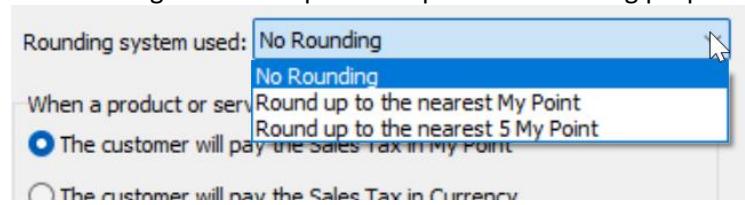
Next, we need to configure Points/Credits by selecting that under the same Parameters tab.



Here we can call our points program whatever we would like. In this example they are called "My Point". You will want to make sure you set that you accept both Cash and points if you wish to sell customer points packages (more details in section 3). We also need to set how many points \$1 is equal to.



SunLync will also need to know if you want it to round points. This can be helpful to keep customers from having fractions of points. Below the rounding settings, you can also control if points can be used to cover sales tax and prevent customers from earning points for purchases made with points. The final three settings can be helpful for reports and tracking purposes.

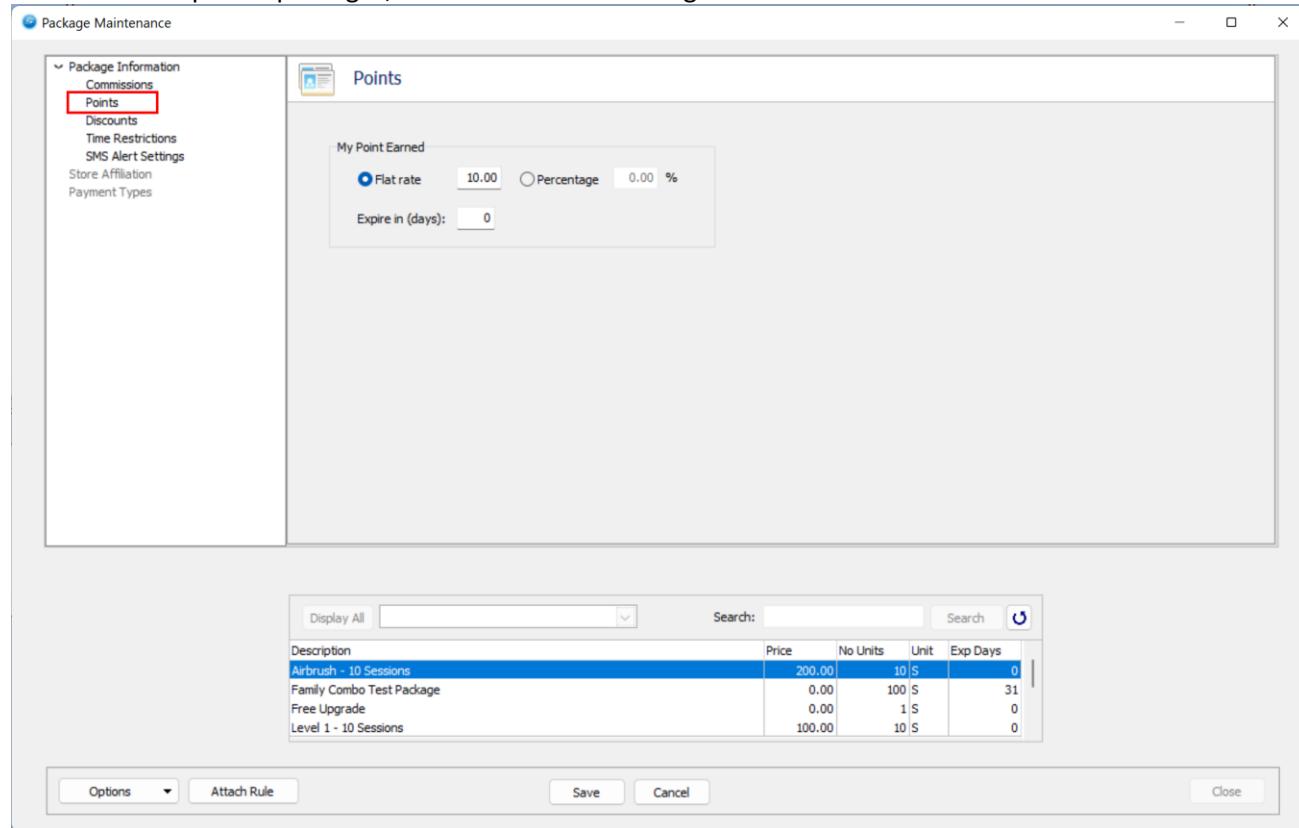


## 2. Earn Points

With the initial configuration complete. We next need to configure our memberships, packages, and inventory purchases to automatically give customers points when they make purchases. All three can be set to give a specific number of points or a percentage based on cost.



For memberships and packages, we will find these settings under the Points.



If you previously set that customers must have specific packages or memberships to earn points. Make sure you check mark them under Package Information for each one.

Package Maintenance

- Package Information**
- Commissions
- Points
- Discounts
- Time Restrictions
- SMS Alert Settings
- Store Affiliation
- Payment Types

**Package Information**

Description:	Airbrush - 10 Sessions
Category:	Custom Airbrush
Unit type:	Sessions
Sales price:	200.00
Total units:	10
<input type="checkbox"/> Employee package <input type="checkbox"/> Hide at POS <input type="checkbox"/> Exclude From MCP <input type="checkbox"/> No promotions allowed <input checked="" type="checkbox"/> Open ended <input type="radio"/> Expiration days <input type="text"/> <input type="radio"/> Expiration date <input type="text"/>	
<input type="checkbox"/> May Redeem My Point When This Package Is Active <input type="checkbox"/> Exempt from tan tax <input checked="" type="checkbox"/> Exempt from service tax Tan tax override rate <input type="text"/> 0.00 Bar code: <input type="text"/> <small>* Bar code must start with "P"</small> Only available from: <input type="text"/> <input type="button"/> Available to: <input type="text"/> <input type="button"/>	
<input type="checkbox"/> Only allow tans at store where package was purchased <input type="button"/> Attach Combo <input type="button"/> Financing	

Description	Price	No Units	Unit	Exp Days
Airbrush - 10 Sessions	200.00	10	S	0
Family Combo Test Package	0.00	100	S	31
Free Spray Tan	0.00	1	S	0
Free Upgrade	0.00	1	S	0

Options
Attach Rule
Save
Cancel
Close

For inventory, go to Inventory Maintenance under the Inventory tab.

Home Customers Employees Equipment **Inventory** Parameters Promotions Reports Help

 Inventory Maintenance
 Retail Categories
 Suppliers

Then select the inventory item and go to the Commissions tab.

Inventory Maintenance

Inventory Control

Product Name	After Tan Body Wash 12oz	<input checked="" type="checkbox"/> Show at POS
Category	After Tan Lotion	<input checked="" type="checkbox"/> Taxable
Product Code	ATL-1234	<input checked="" type="checkbox"/> Apply Tax
UPC Code		
Supplier	Global Sunlight	
Item	For Sale	<input type="checkbox"/> No Promotions Allowed
Container		
Minimum Qty	4	
<input checked="" type="checkbox"/> Allow item to be paid for in My Point		
Sales description at POS		
Box Here		Attach Combo

Pricing      Commissions      Discounts      Sales Tax      Add-On Bundle Categories

Commission

Flat Rate \$ 0.00     Percent 0.00 %

My Point

Flat Rate 0.00     Percent 0.00 %

Exp. Days 0

Price List

Default Price

[Insert Price](#) [Edit Price](#) [Delete Price](#)

PRODUCT LIST   Order By Product Name

Product Code	Product Name	Supplier	Date Entered
ATL-1234	After Tan Body Wash 12oz	Global Sunlight	7/28/2022
ATG-555	After Tan Gel 12oz	Global Sunlight	7/28/2022
BW12	Bottled Water	Drink Vendor	7/28/2022
BP-889	Bronzing Packette	T.W. Tan	7/28/2022
BL-123	Dark Bronzing Lotion	T.W. Tan	7/28/2022
EW-5547	Eye Keepers	T.W. Tan	7/28/2022

"Available at" Stores

Search

[Save](#) [Cancel](#) [Close](#)

### 3. Purchasing Points Packages

Just like packages and memberships. You can configure Points Packages. These can be sold to customers. In Back Office, go to the Promotions tab and select Maintenance for Points.



Like packages and memberships. Fill in the details on the name, units, and cost. You can also control if they expire, commission given to employees for selling them, and what discounts can be applied to them. You can even limit how often a customer can purchase a points package. Make sure you also affiliate these points packages with the stores they will be available at.

Package Information Store Affiliation

Description	50 Points		
Total Units	50	Sales Price	5.00

Expiration

Open Ended

Expires in  days

Commission

Flat Rate  \$ 0.00

Percentage  %

May only purchase this package/membership  0 time(s) within  0 days.

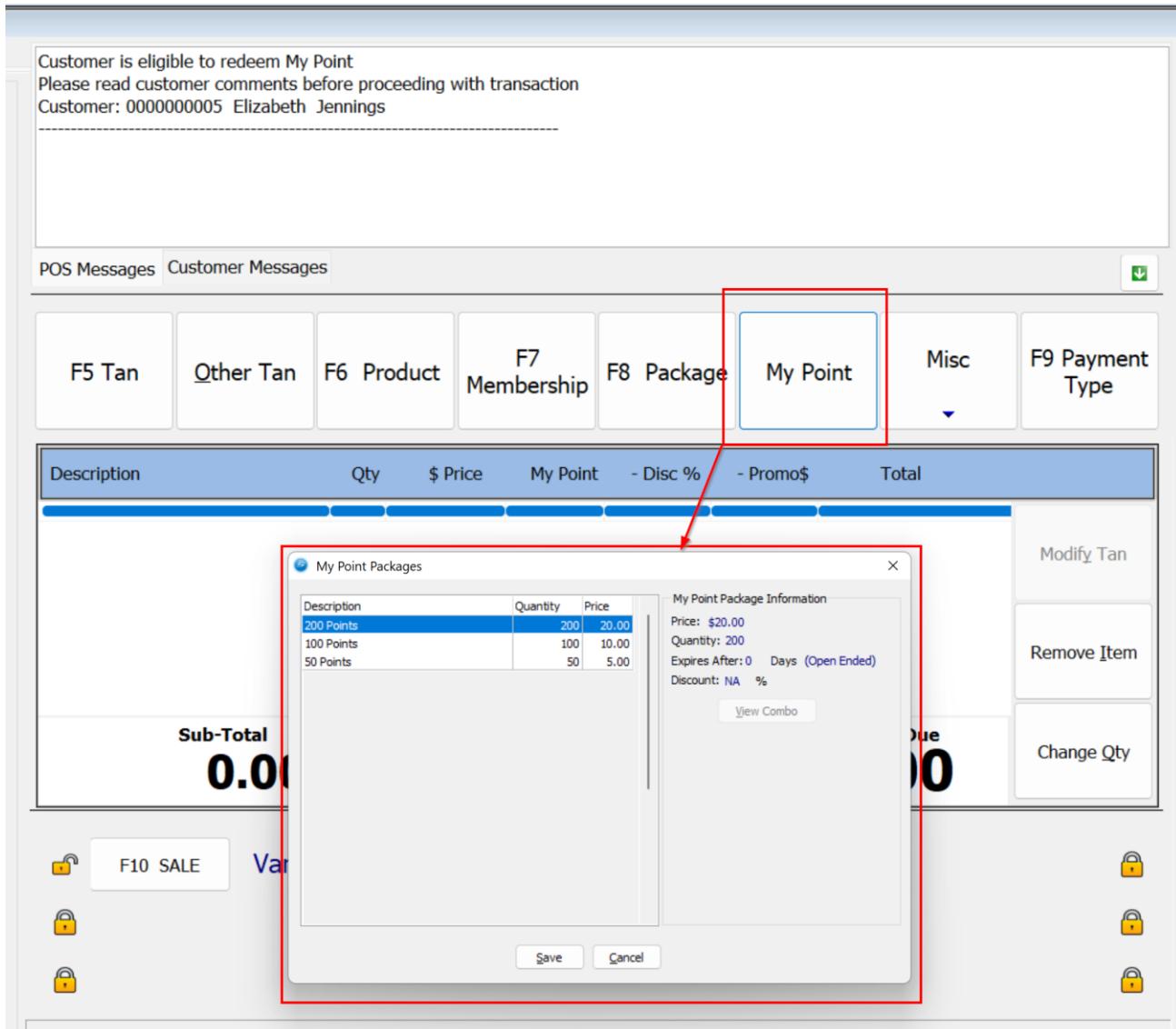
Hide At POS

Attach Combo

Description	Quantity	Price	Exp Days
50 Points	50	5.00	
100 Points	100	10.00	
200 Points	200	20.00	

Insert Edit Delete Close

To sell one of these points packages, at POS they are listed under the button with the same name as your point program ("My Point").



## 4. Give Points

You can also manually and automatically give points to customers in mass. From the Promotions tab in Back Office. Select Give Points (in this example “Give My Point”).



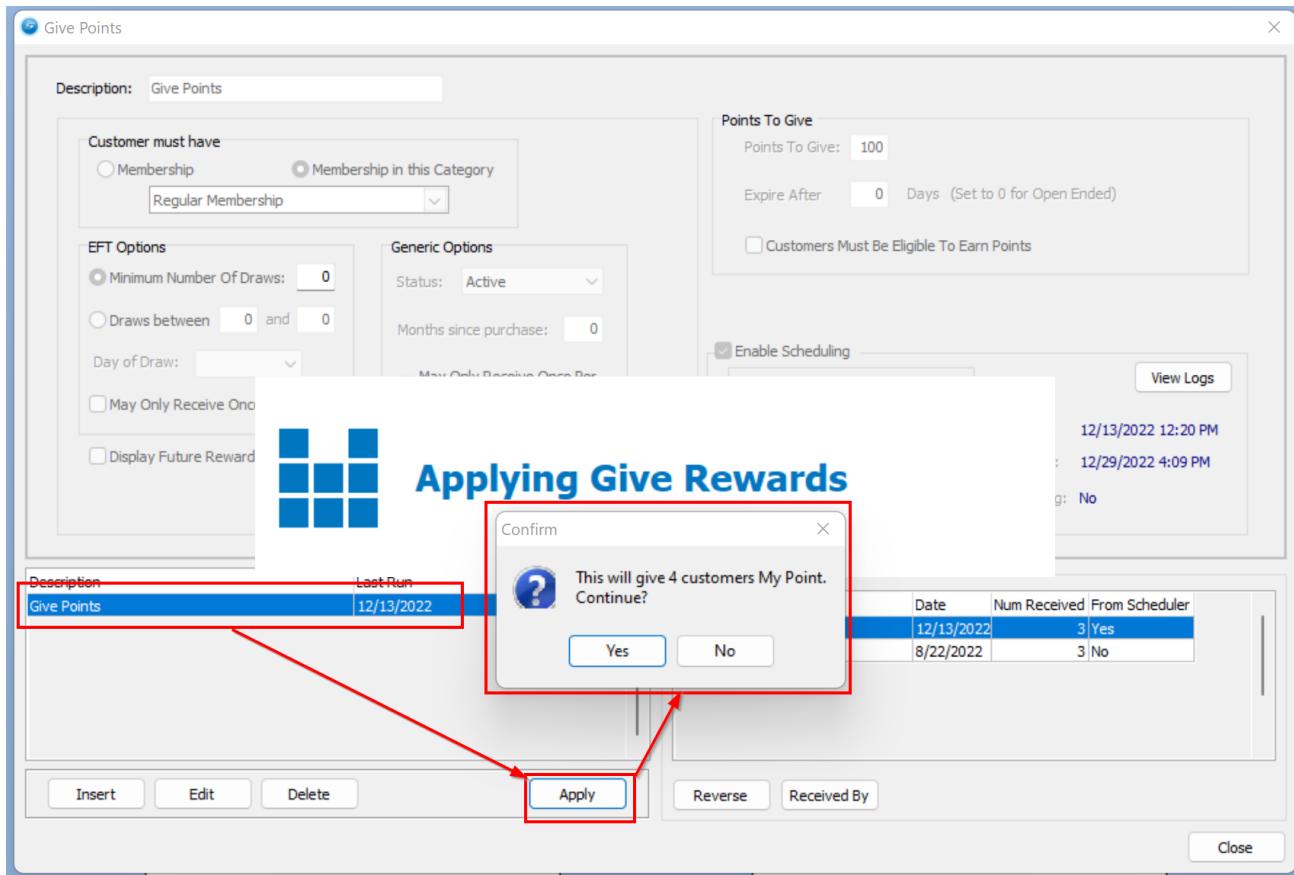
Points can be given manually or scheduled to be given automatically based on specific memberships or membership categories. You will need to create multiple ones if you want to give to more than one membership and/or categories of memberships.

If it's an EFT membership or you select by category, you will have additional settings to configure. Such as requiring a customer to have been charged for their EFT memberships X number of times before they start getting points.

Give Points

Description: Give Points													
Customer must have													
<input type="radio"/> Membership <input checked="" type="radio"/> Membership in this Category													
ETF Membership													
EFT Options													
<input checked="" type="radio"/> Minimum Number Of Draws: 0													
<input type="radio"/> Draws between 0 and 0													
Day of Draw:													
<input type="checkbox"/> May Only Receive Once Per Draw													
<input type="checkbox"/> Display Future Reward POS Message													
Generic Options													
Status: Active													
Months since purchase: 0													
<input type="checkbox"/> May Only Receive Once Per Membership													
Points To Give													
Points To Give: 100													
Expire After 0 Days (Set to 0 for Open Ended)													
<input type="checkbox"/> Customers Must Be Eligible To Earn Points													
Enable Scheduling													
<input type="radio"/> Weekly <input checked="" type="radio"/> Monthly													
Run Date: 12/29/2022													
Run Time: 4:09:23 PM													
Last Run: 12/13/2022 12:20 PM Next Run: 12/29/2022 4:09 PM Processing: No													
History													
<table border="1"> <thead> <tr> <th>Description</th> <th>Date</th> <th>Num Received</th> <th>From Scheduler</th> </tr> </thead> <tbody> <tr> <td>Give Points</td> <td>12/13/2022</td> <td>3</td> <td>Yes</td> </tr> <tr> <td>Reversed - Give Points</td> <td>8/22/2022</td> <td>3</td> <td>No</td> </tr> </tbody> </table>		Description	Date	Num Received	From Scheduler	Give Points	12/13/2022	3	Yes	Reversed - Give Points	8/22/2022	3	No
Description	Date	Num Received	From Scheduler										
Give Points	12/13/2022	3	Yes										
Reversed - Give Points	8/22/2022	3	No										
Save Cancel Apply Reverse Received By Close													

Set the number of points to give and if they expire. It's very helpful to schedule these points to automatically be given to customers weekly or monthly. Make sure the next run date is set to the future. Even when you set points to be given on a schedule. You can still give points on demand by selecting the Give Points to give, Then select Apply. SunLync will calculate how many people will get the points and await confirmation before giving the points. If you need you can always see who received the points or reverse the points given.



## 4. Give Packages and Promotions

A points program is not the only way you can reward your loyal customers. Like Give Points, we can also Give Packages and Give Promotions to customers.



In the example below, after a customer's first monthly payment. SunLync will give our customers with Level 1 EFT membership a Free Upgrade package. The Free Upgrade package in this example has been configured to be a single tanning session on any level 2 or 3 bed.

Give Packages

Description: <input type="text" value="Free Upgrade"/>							
Customer must have <input checked="" type="radio"/> Membership <input type="radio"/> Membership in this Category <input type="button" value="Level 1 EFT"/>							
EFT Options <input checked="" type="radio"/> Minimum Number Of Draws: <input type="text" value="1"/> <input type="radio"/> Draws between <input type="text" value="0"/> and <input type="text" value="0"/> Day of Draw: <input type="text" value="01"/> <input checked="" type="checkbox"/> May Only Receive Once Per Draw <input type="checkbox"/> Display Future Reward POS Message							
Generic Options Status: <input type="text" value="Active"/> Months since purchase: <input type="text" value="0"/> <input type="checkbox"/> May Only Receive Once Per Membership							
Package To Give Package: <input type="text" value="Free Upgrade"/> Units: <input type="text" value="1"/> Package Expiration <input checked="" type="radio"/> Open Ended <input type="radio"/> Date <input type="text"/> <input type="radio"/> Expire After <input type="text" value="0"/> Days							
Enable Scheduling <input type="radio"/> Weekly <input checked="" type="radio"/> Monthly Run Date: <input type="text" value="6/ 2/2023"/> Run Time: <input type="text" value="11:58:58 AM"/>							
History <table border="1"> <thead> <tr> <th>Description</th> <th>Last Run</th> </tr> </thead> <tbody> <tr> <td>Employee Minutes</td> <td>9/9/2022</td> </tr> <tr> <td>Free Upgrade</td> <td></td> </tr> </tbody> </table>		Description	Last Run	Employee Minutes	9/9/2022	Free Upgrade	
Description	Last Run						
Employee Minutes	9/9/2022						
Free Upgrade							
Save      Cancel      Apply      Reverse      Received By      Close							

## 5. Customer Referrals

We can also configure SunLync to give store credit, points, or promotions to customers when they refer customers. In the example below, I've set Customer Referrals to give the promotion Free Spray Tan to the customer that referred someone to the salon.

Store Parameters

**Customer Settings**

**Customer**

- Default "May Earn Points" for new customers
- Capitalize data on customer insert
- Enable customer picture
- Default "Email Communication" for new customers
- Require customers to be scanned in to use services and ledger

Keep History of Changes for

- Demographics
- EFT information

**Customer Screen Labels**

Scan#:

Custom 1: Custom #1

Custom 2: Custom #2

**Customer Referrals**

Customer referral amount (if issuing credit)

Allow employees to be given customer referral credit or promotion

**Credit Option**

- Issue credit on the account ledger
- Issue My Point

Give promotion

**Customer Chip Card**

Maximum amount that the chip card balance can be set to

Chip card is required each time the customer tans

Transfer chip card balance to active credits package

If no active credits package exists create one based on this package:

**Current Store: My Sun Salon**

Location	Manager	IP Address	Address
My Sun Salon		127.0.0.1	123 Sun st
Corporate			

Misc. Options

Edit

Close

Under the Promotions tab, select Maintenance for Promotions.

Home Customers Employees Equipment Inventory Parameters Promotions Reports Help

Maintenance	Categories	Maintenance	Categories	Maintenance	Maintenance	Maintenance	Custom Services	Promotions	Combos Maintenance	Gift Certificate Maintenance
Rules		Rules	Give Packages		Give My Point	Give Promotions				
Memberships		Packages		Points						

Below you will see I've created a promotion to give the customer a Free Spray Tan 100% off promotion onto their account to be used later.

Promotions Maintenance

Promotions

- General
- Retail Category
- Retail Item
- Service
- Store Affiliation

**Promotion Information**

Description: Free Spray Tan

Start date:

Expiration date:

Bar code:  \*Bar code must start with a "C"

Promotion must be scanned at POS in order to be redeemed

Customer Specific Promotion  Calculate commissions based on sale price, rather than full retail price

Promotion redeemable once every  0 days per customer

Expiration Days

**Service Promotion**

Service Promotion

Maximum service value:  \$  0  %  100  Non-UV services only

Service / Service category specific

Packages  Spray Tan 1 Session

Display All

Description	Type
Free Spray Tan	General

Save  Close

Then at POS when creating a new customer. Search and select the customer that referred the new customer. SunLync will take care of adding that promotion, credit, or points to the customer that did the referring.

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