



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.

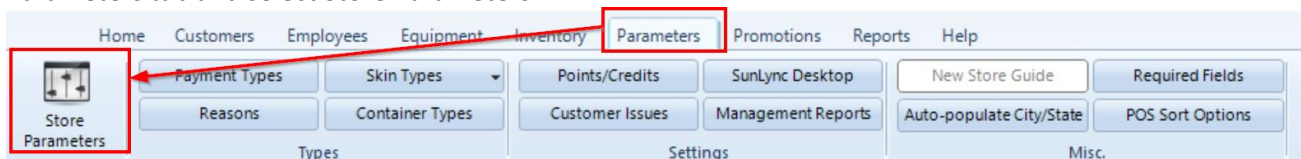
**To:** Clients new or old to SunLync that would like walked through how to set up a rewards program.

### **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.

Store Parameters

Demographics  
Point of Sale  
Customer  
Reports  
Security  
E-Lync  
Documents  
Peripherals  
Inventory  
Regulations  
Biometrics  
Gift Certificates\Cards  
Offline Utility  
EFT  
Credit Card Processing  
Points\Credits  
Employees  
Account Ledger  
Appointments  
PCA  
MTS  
Promotions  
Tokenization

Points Credits Settings

Allow My Point to be used to purchase:

- ☒ Tans
- ☒ Products
- ☒ Packages
- ☐ Memberships
- ☐ Gift Certificates
- ☐ Account Ledger
- ☒ Upgrades
- ☐ Custom Services

Store Credit

☒ Allow store credits

Maximum credit: 50.00

☐ Use Package/Membership To Determine My Point Redemption Status

☐ Use membership to determine if customer may earn My Point

☐ Remove all My Point when customer cancels membership (My Point removed immediately)

☐ Remove all My Point when customer membership expires

☐ Allow the customer to pay for a container with My Point

☐ When calculating My Point earned based on percentage of sale deduct promotion amounts

Current Store: My Sun Salon

Search

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

Misc. Options Save Cancel Close

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).

Store Parameters

Demographics  
Point of Sale  
Customer  
Reports  
Security  
E-Lync  
Documents  
Peripherals  
Inventory  
Regulations  
Biometrics  
Gift Certificates\Cards  
Offline Utility  
EFT  
Credit Card Processing  
Points\Credits  
Employees  
Account Ledger  
Appointments  
PCA  
MTS  
Promotions  
Tokenization

Points Credits Settings

Allow My Point to be used to purchase:

- ☒ Tans
- ☒ Products
- ☒ Packages
- ☐ Memberships
- ☐ Gift Certificates
- ☐ Account Ledger
- ☒ Upgrades
- ☐ Custom Services

Store Credit

☒ Allow store credits

Maximum credit: 50.00

☐ Use Package/Membership To Determine My Point Redemption Status

☐ Use membership to determine if customer may earn My Point

☐ Remove all My Point when customer cancels membership (My Point removed immediately)

☐ Remove all My Point when customer membership expires

☐ Allow the customer to pay for a container with My Point

☐ When calculating My Point earned based on percentage of sale deduct promotion amounts

Current location has been updated.  
Would you like to update additional locations?

☒ Update Current Store Only

☐ Update Stores on Store Update List

☐ Update All Stores

OK

Current Store: My Sun Salon

Search

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

Misc. Options Save Cancel Close

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

Store Parameters

Demographics  
Point of Sale  
**Customer**  
Reports  
Security  
E-Lync  
Documents  
Peripherals  
Inventory  
Regulations  
Biometrics  
Gift Certificates/Cards  
Offline Utility  
EFT  
Credit Card Processing  
Points/Credits  
Employees  
Account Ledger  
Appointments  
PCA  
MTS  
Promotions  
Tokenization

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 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  Search

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

Misc. Options

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

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

Store Parameters

Payment Types Skin Types **Points/Credits** SunLync Desktop New Store Guide Required Fields

Reasons Container Types Customer Issues Management Reports Auto-populate City/State POS Sort Options

Types Settings Misc.

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.

Points/Credits Settings

Points System Setup

Naming Convention:

We use  at Point of Sale.

One \$ is equal to  My Point

Rounding system used:

When a product or service is purchased with My Point,

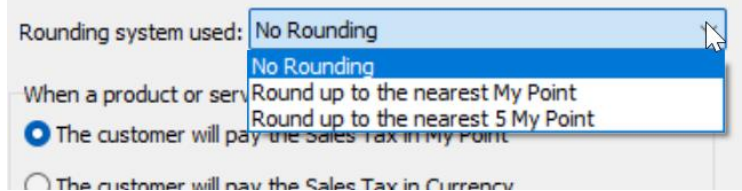
- ☒ The customer will pay the Sales Tax in My Point
- ☐ The customer will pay the Sales Tax in Currency

- ☐ Allow customers to earn My Point when paying with My Point
- ☐ Treat My Point as discount rather than payment
- ☐ Display My Point as negative amount if balance less than 0
- ☐ Do not allow My Point to go below 0 on voids, refunds and adjustments

Package Credits Setup

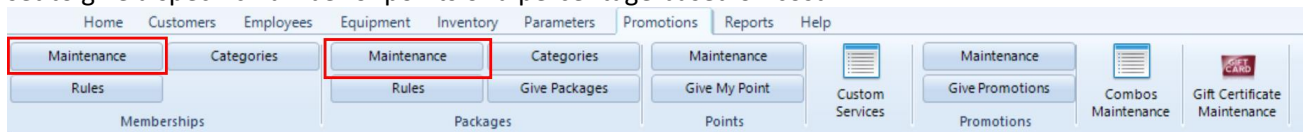
Naming Convention:

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.

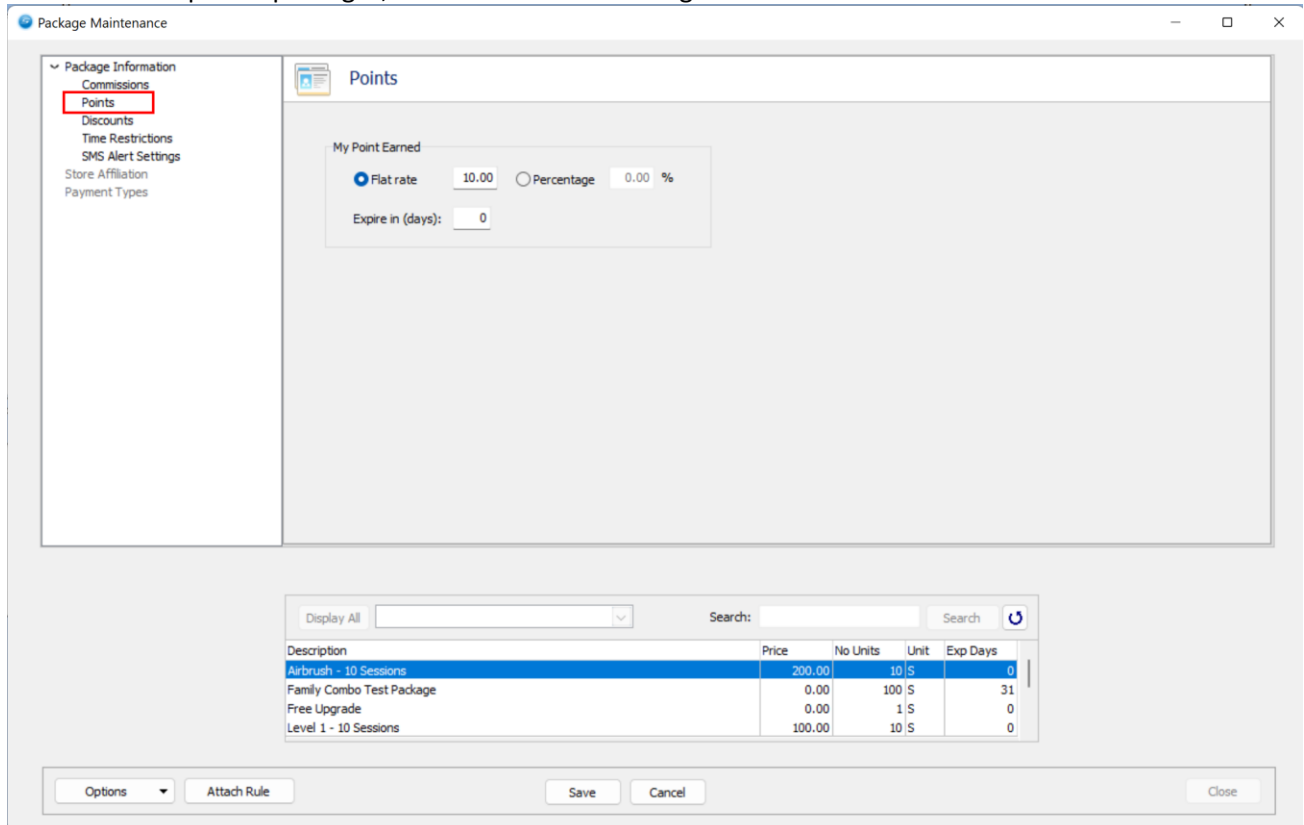


## 2. Earn Points

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

Description: Airbrush - 10 Sessions  
Category: Custom Airbrush  
Unit type: Sessions  
Sales price: 200.00  
Total units: 10

☐ Employee package  
☐ Hide at POS  
☐ Exclude From MCP  
☐ No promotions allowed  
☒ Open ended  
    ☐ Expiration days  
    ☒ Expiration date

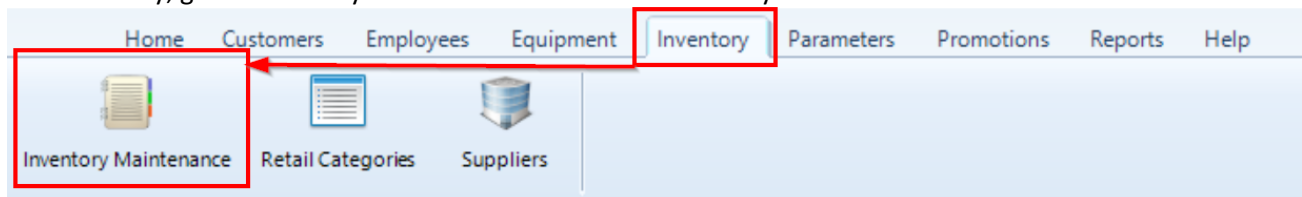
☐ May Redeem My Point When This Package Is Active  
☐ Exempt from tan tax  
☒ Exempt from service tax  
Tan tax override rate: 0.00  
Bar code:   
    \* Bar code must start with "P"  
Only available from:   
Available to:   
☐ Only allow tans at store where package was purchased  
Attach Combo    Financing

Display All    Search:    Search

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.



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

Inventory Maintenance

Inventory Control

Product Name: After Tan Body Wash 12oz ☐ Show at POS

Category: After Tan Lotion ☒ Taxable

Product Code: ATL-1234 ☒ Apply Tax

UPC Code:

Supplier: Global Sunlight ☐ No Promotions Allowed

Item: For Sale

Container:

Minimum Qty: 4

☒ Allow item to be paid for in My Point

Sales description at POS

Box Here

Commissions

Commission

☒ Flat Rate \$ 0.00 ☐ Percent 0.00 %

My Point

☒ Flat Rate 0.00 ☐ Percent 0.00 %

Exp. Days 0

Price List

Default Price

PRODUCT LIST Order By: Product Name Filter By: ☒ Product Name ☐ Category ☐ Item

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
BW-12	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

### 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.

Home Customers Employees Equipment Inventory Parameters Promotions Reports Help

Maintenance Categories Maintenance Categories Maintenance

Rules Rules Give Packages Give My Point

Memberships Packages Points

Custom Services Maintenance Give Promotions Combos Maintenance Gift Certificate Maintenance

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.

Point Package Maintenance

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.

Attach Combo

☒ No Package Discount Allowed

☐ All Discounts Allowed

☐ Default Discount %

0.00

Override Discount %

0.00

Override From

Override To

Hide At POS

☐

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”).

Customer is eligible to redeem My Point  
Please read customer comments before proceeding with transaction  
Customer: 0000000005 Elizabeth Jennings

---

POS Messages Customer Messages

F5 Tan Other Tan F6 Product F7 Membership F8 Package **My Point** Misc F9 Payment Type

Description	Qty	\$ Price	My Point	- Disc %	- Promo\$	Total

**My Point Packages**

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

**My Point Package Information**

Price: \$20.00  
Quantity: 200  
Expires After: 0 Days (Open Ended)  
Discount: NA %

[View Combo](#)

Save Cancel

**Sub-Total**  
**0.00**

F10 SALE Var

Modify Tan  
Remove Item  
Change Qty

## 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").

Home Customers Employees Equipment Inventory Parameters Promotions Reports Help

Maintenance Categories Maintenance Categories Maintenance Give My Point Custom Services Maintenance Give Promotions Combos Gift Certificate Maintenance

Rules Rules Rules Give Packages Points

Memberships Packages Promotions

Points can be given manually or scheduled to be given automatically based on specific memberships or membership categories. You will need to create multiply 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

☐ Membership
☒ Membership in this Category

ETF Membership

EFT Options

☒ Minimum Number Of Draws: 0
☐ Draws between 0 and 0

Day of Draw:

☐ May Only Receive Once Per Draw
☐ Display Future Reward POS Message

Generic Options

Status: Active

Months since purchase: 0

☐ May Only Receive Once Per Membership

Points To Give

Points To Give: 100

Expire After 0 Days (Set to 0 for Open Ended)

☐ Customers Must Be Eligible To Earn Points

☒ Enable Scheduling

☐ Weekly
☒ Monthly

View Logs

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

Description	Last Run
Give Points	12/13/2022

History

Description	Date	Num Received	From Scheduler
Give Points	12/13/2022	3	Yes
Reversed - Give Points	8/22/2022	3	No

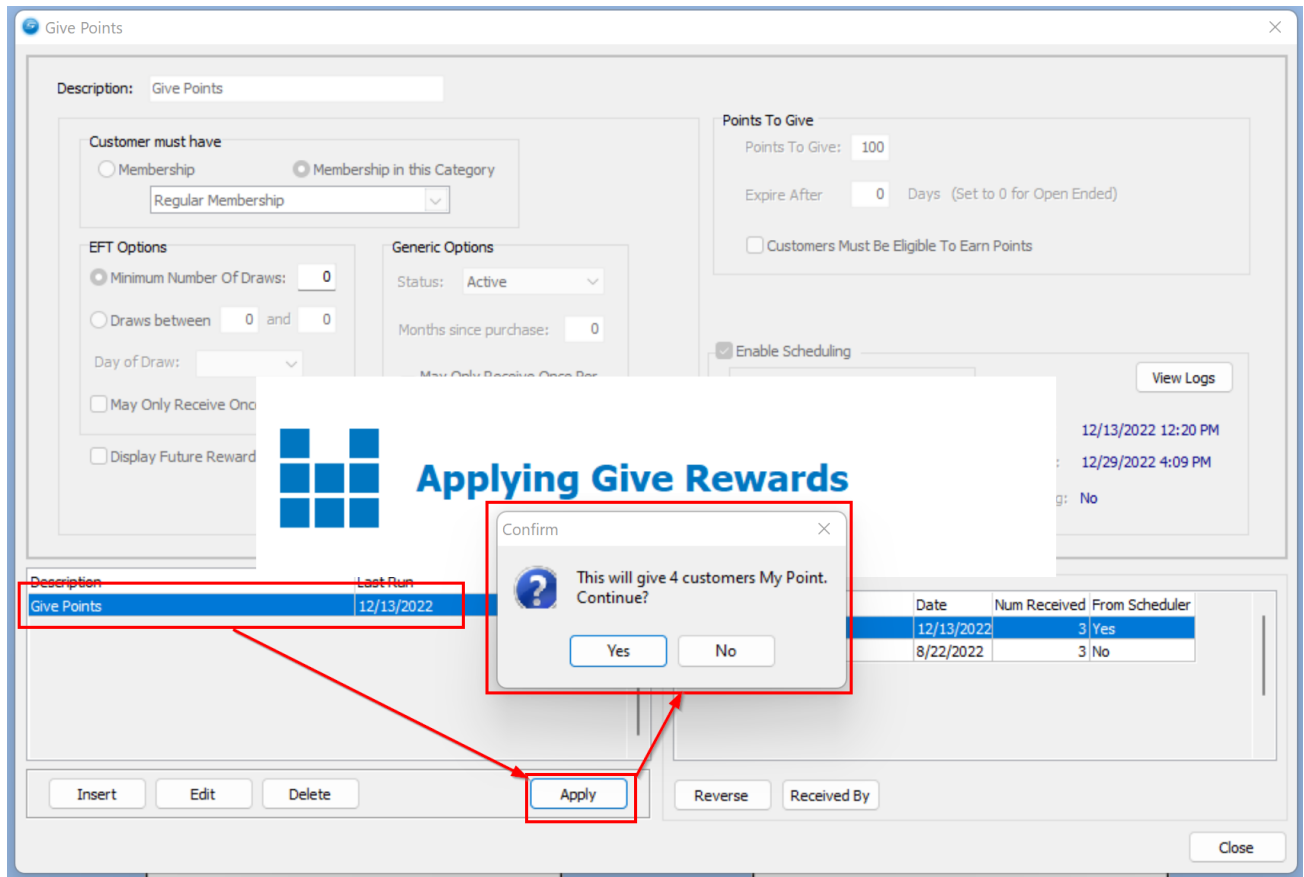
Save Cancel

Apply

Reverse Received By

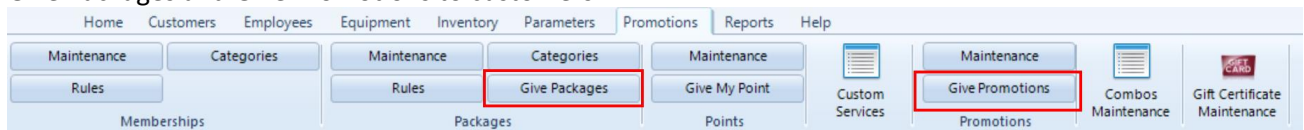
Close

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: Free Upgrade

Customer must have

☒ Membership
☐ Membership in this Category

Level 1 EFT

EFT Options

☒ Minimum Number Of Draws: 1
☐ Draws between 0 and 0

Day of Draw: 01

☒ May Only Receive Once Per Draw

Generic Options

Status: Active

Months since purchase: 0

☐ May Only Receive Once Per Membership

☐ Display Future Reward POS Message

Package To Give

Package: Free Upgrade
Units: 1

Package Expiration

☒ Open Ended
☐ Date

☐ Expire After 0 Days

☒ Enable Scheduling

☐ Weekly
☒ Monthly

Run Date: 6/ 2/2023
Run Time: 11:58:58 AM

Last Run:
Next Run: 5/4/2023 11:58 AM
Processing: No

View Logs

Description	Last Run
Employee Minutes	9/9/2022
Free Upgrade	

Description	Date	Num Received	From Scheduler

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 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  Search

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

Misc. Options

Under the Promotions tab, select Maintenance for Promotions.

Home Customers Employees Equipment Inventory Parameters Promotions Reports Help

Maintenance Categories Maintenance Categories Maintenance

Rules Give Packages Give My Point

Memberships Packages Points Custom Services

Maintenance Give Promotions Combos Gift Certificate

Promotions Maintenance Maintenance

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:  Start date:

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

☐ Promotion must be scanned at POS in order to be redeemed Day Availability:

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

Promotion redeemable once every  days per customer Expiration Days

### Service Promotion

☒ Service Promotion

Maximum service value: ☐ \$  ☒ %  ☐ Non-UV services only

☒ Service / Service category specific

Display All Search:

Description	Type
Free Spray Tan	General

Save Cancel 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.

Approved for External Distribution \_\_\_\_\_