

OPERATOR

This guide is intended for daily use of the system

Loyalty and Membership in Dinerware

Introduction and Overview

Dinerware version 3.1 and higher, includes a number of functions to facilitate membership and loyalty programs. The system includes a built-in membership provider that supports basic loyalty functionality for a single restaurant.

Overview

Key considerations and a thoughtful business plan around a loyalty program will determine if the restaurateur's offer drives repeat, high-value sales or sets customer expectations improperly and at a detriment to the business. The Dinerware software merely executes the loyalty or membership program conceived by the restaurateur.

This guide is written for Dinerware Authorized Dealers and operators or owners of the Dinerware software system and is intended as a step-by-step setup guide within the software.

For best business practices about the creation and execution of a membership or loyalty program, please consult your Dinerware Authorized Dealer or a trusted marketing professional.

The features have been designed to make it easy to adjust the implemented loyalty or membership program as experience is gained over time, however, it the restaurateur's responsibility to manage customer expectations regarding the perceived value of points and offers.

In this guide the basic concept of membership and loyalty will be described, and the specific setup steps within the Dinerware software will be reviewed.

Loyalty and Membership Basic Concepts

Features - enable or disable anytime

Membership features may be enabled and disabled as needed and the restaurateur may elect to use multiple membership providers simultaneously. Each guest may be a member of any active program.

Guests have a unique ID

Each participating guest is associated with a membership provider via a unique ID. After the guest has been enrolled into a program, the Dinerware system will remember the association. If additional guest information is collected, the Dinerware standard search functionality may be used to find the guest, even if the guest does not have their card or ID number.

The relationship between rules, offers and discounts

Loyalty

A program designed by a restaurateur to track purchases by guests through point accruals and point redemptions via offers, usually offered as discounts on future purchases

Membership

A guest has been enrolled in one or more loyalty providers and has been assigned a unique ID; a guest cannot accrue points or participate in offers without provider membership.

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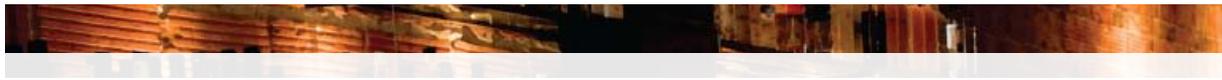
Rules Evaluation and Precedence

Member Enrollment and Order Entry

Member Identification

Enrollment

Point Balance and Offers



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During setup, the rules for earning and spending points must be defined. Guests may earn points by purchasing items for which there is a rule. Guests spend points by accepting 'offers.' Offers are made according to rules associated with discounts. Offer acceptance always results in the application of a discount to the current ticket.

Restrictions

Any restrictions on the discount also apply. For example, if the discount is restricted to certain items or certain times of day, those restrictions also apply to any offer made by the loyalty system.

A Snapshot of Loyalty in Dinerware

This reference key defines general areas within the Loyalty screen in Dinerware.

View options

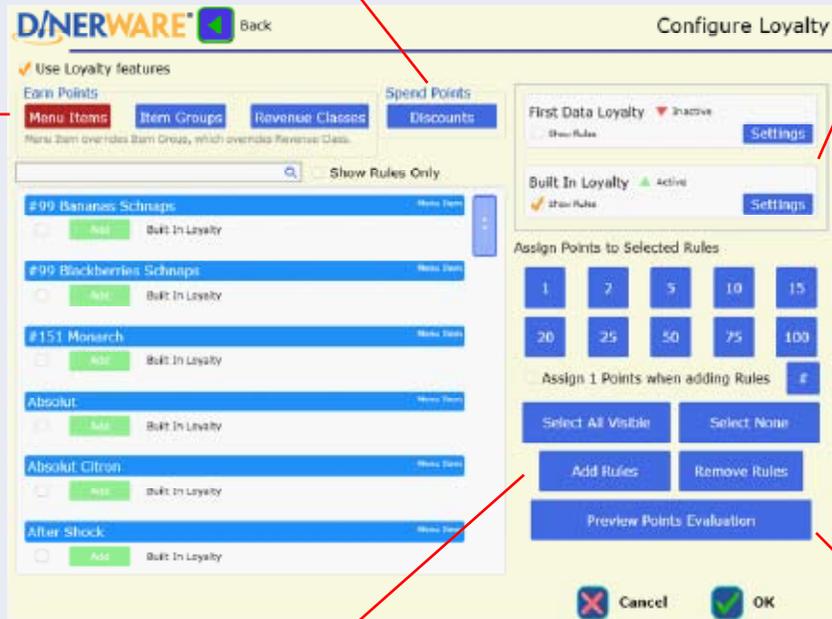
Choose one of the three buttons to make those items or categories appear in the View Window below.

Discounts

This button lists available discounts that can be setup as offers.

Providers section

This area lists providers set up in the system. The example shown includes two providers: First Data and Built-In. These are active areas where, at a touch, they can be activated or deactivated and where rules to be shown or hidden. The 'Settings' button within each provider enables detailed customization for that specific provider.

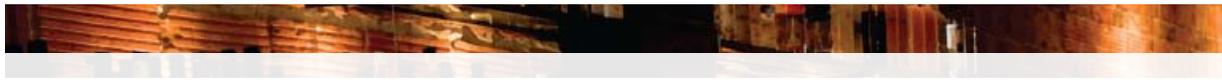


Rules section

This area enables rule setup to be associated with items, categories and discounts.

Preview Points Evaluation

View points activity on recent tickets.



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Configuration

Important: Discounts must be set up in the Dinerware system before rules should be configured in the Loyalty section. For best practices, Dinerware recommends Discounts be setup before configuring any items in the Loyalty section.

To reach the configuration screen, touch **'Manager'** then choose **'Advanced.'** In the Advanced Configuration screen, touch **'Loyalty.'**

How to enable or disable the entire loyalty system:

Touch the checkbox labeled **'Use Loyalty Features.'** Touching this checkbox will enable or disable the entire loyalty system at any time, but will not change any saved settings within the program.

Provider Configuration

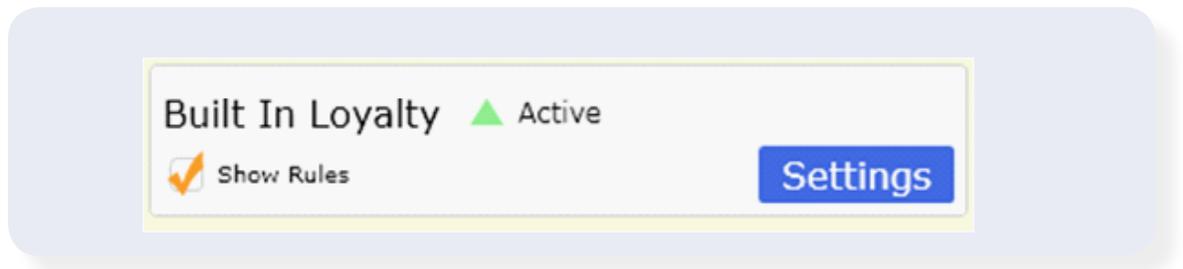
Any combination of providers may be used simultaneously. Each provider includes individual settings. The Dinerware system includes a built-in loyalty provider, and a First Data loyalty provider.

The First Data loyalty provider requires additional provisioning and setup. Contact a First Data representative for more information.

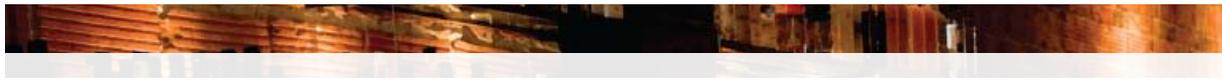
The built-in loyalty provider offers basic features for a single location. This provider may be used at any time.

How to enable or disable any provider:

1. Locate the provider in the list of available providers



2. Touch the **'Active / Inactive'** label



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Settings for each provider are not standardized, so each provider will require customized settings. For example, the built-in provider includes an option to accrue 1 point per dollar spent for rules with a 0 point value.

The First Data provider requires settings related to the First Data loyalty merchant account.

How to adjust settings for any provider:

1. Touch the Settings button within the provider section
2. Choose the required options

Tip: If more than one provider is in use, the system can easily be set to show only the rules pertaining to a single provider.

How to show or hide provider rules:

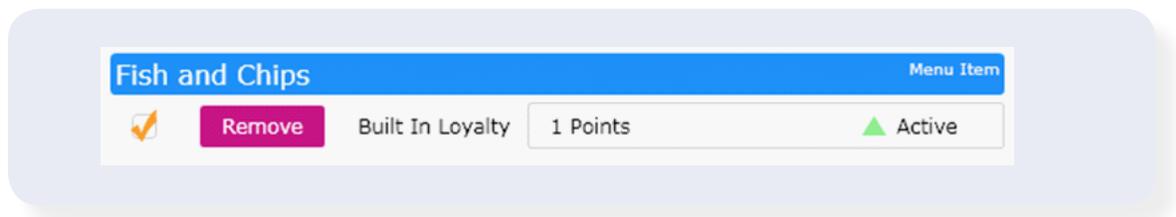
3. Touch the **'Show Rules'** box within the provider section.

Working with Rules

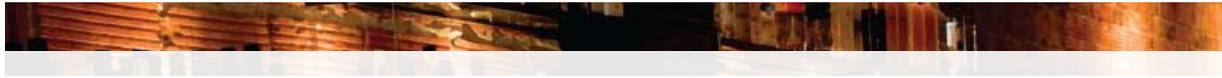
'Points' are earned and spent through the application of 'Rules,' which must be created. 'Earning Rules' are associated with 'Menu Items,' 'Item Groups,' or 'Revenue Classes.' 'Spending Rules' are associated with 'Discounts.'

Important: For purposes of spending or redeeming points, remember to create appropriate discounts prior to assigning rules.

A rule may include a point value.



Rules may be added and removed, however, rules can be created then made inactive; they do not need to be removed.



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The system allows rules to be made quickly and easily.

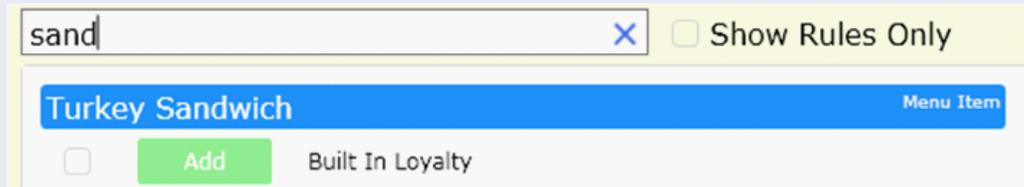
By default, all Menu Items, Item Groups, Revenue Classes, and Discounts are shown.

For each possible rule, an item will appear in the list. If a rule does not exist, the item will have an 'Add' button and if a rule exists, the item will show a 'Remove' button.

To show the rules associated with a type (Menu Item, Item Group, Revenue Class, or Discount), touch the corresponding button.

How to search for an item:

1. Type part of the item name in the search box
2. The list is filtered as the word is typed



How to show all items and clear the search filter:

3. Touch the 'X' in the search box

How to show only those rules with exist:

1. Toggle the button labeled 'Show Rules Only'
2. The list will show only those items with an associated rule(s)

Many rules can be added, removed, or assigned point values at one time.

How to select or deselect a rule for edit:

1. Touch the check box at the left edge of the rule

If a rule is added or other actions are performed, the rule will be automatically selected.

How to select many rules at once:

1. Use the search filter to display some items

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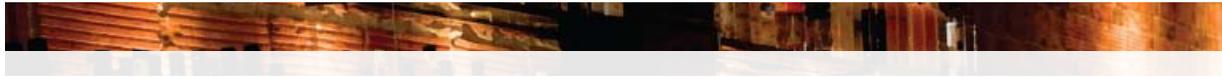
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2. Choose **'Select All Visible.'**

How to add or remove many rules at once:

1. Select multiple rules
2. Choose **'Add Rules'** or **'Remove Rules'**
3. Rule are added or removed for the selected items

Check the box marked **'Assign n points when Adding Rules'** to set a standard point value, which will be assigned whenever a rule is added.

How to clear the selection:

1. Choose **'Select None'**
2. All rules will be deselected

How to assign points to one or more rules:

1. Select the desired rules
2. Touch one of the numeric buttons

How to assign a non-standard point amount:

3. Touch the hash (#) button and enter any value

Rules Evaluation and Precedence

When computing earnings, the system evaluates the rules in precedence order. For example, if there are two Menu Items:

Latte
Special Mocha

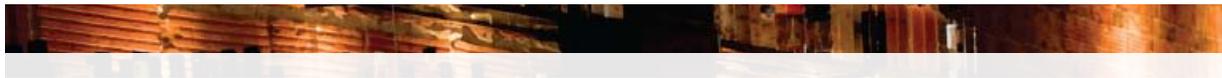
And one Item Group:

Coffee Drinks

It is decided that guests will earn 2 points for each Coffee Drink purchased. To do this, create a 2 point rule for the 'Coffee Drinks' item group. Any Menu Item which is a member of the 'Coffee Drinks' item group will now earn 2 points.

Individual rules do not need to be created for each Menu Item.

Example: To promote the menu item 'Special Mocha' for a value of 3 points for each purchase, highlight Menu Items, touch the item Special Mocha and add a 3 point rule for that item.



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Important: The rule for a menu item always takes precedence over a rule for an item group. Likewise, the rule for an item group always takes precedence over the rule for a revenue class.

Evaluation precedence allows for broad rules to be applied across many menu items based on membership in item group or revenue class, with exceptions for certain, more specific cases.

Member Enrollment and Order Entry

To use the membership features, follow a few simple steps.

1. Find the member
 - > Look up an existing customer, or
 - > Enter a member credential, such as a loyalty ID or a physical loyalty card

If necessary, enroll the customer into the loyalty program

2. Engage in the normal order entry process

If there are offers for the customer, accept the offers in order to apply appropriate discounts.

The customer can be associated with the guest check at any time during the order entry process. A guest check can be re-opened and the association can be made at a later time.

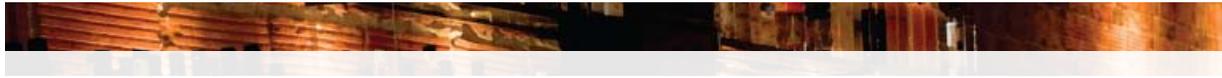
During order entry, the membership and loyalty features are found primarily under the Order | Customer toggle, which is located in the upper right of the Order Entry screen.



Customer features must be turned ON in order to access the membership functions. If the button does not appear, customer features have not been enabled.

How to enable customer features

1. Touch 'Manager,' choose 'System' and select 'Customers'
2. Clear the check box labeled 'Turn off all Customer Features'



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Member Identification

If the customer offers a membership device such as a card or barcode, it may be scanned or swiped at any time to recall the customer and membership information. Otherwise, use the customer search function to find the customer according to name, phone number, email, or other information.

If other identifying information is collected, such as a phone number or email address, the customer may participate in the program even if they do not have their card or membership number with them!

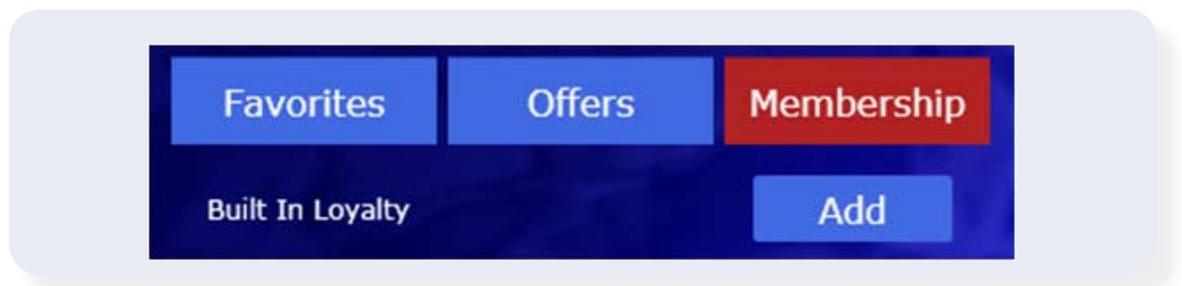
Enrollment

Each customer in the Dinerware system may be enrolled in any available program. If multiple locations are operated with the First Data provider, and a customer who is already a member appears at a new location, the customer will be added to the local system. Favorites will be calculated for the customer normally as they return to the same location on multiple visits.

Sometimes no information about a guest may exist in the system other than their loyalty membership ID. In this case, a blank, or anonymous customer is created in the system, which can be filled with additional information at any time.

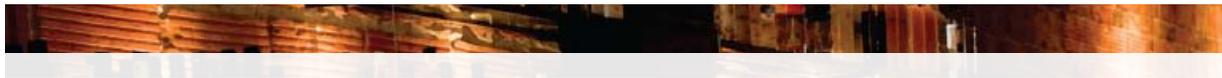
How to enroll a customer into a program:

1. Find an existing customer or create a new one
2. If the customer is shown in the list, touch that customer to view the detail
3. Three tabs will appear at the bottom of the customer detail



4. Touch the **'Membership'** tab
5. All active programs are shown

If the customer is already a Member, the membership ID is shown. Otherwise, the **'Add'** button allows the customer to be enrolled into the program.



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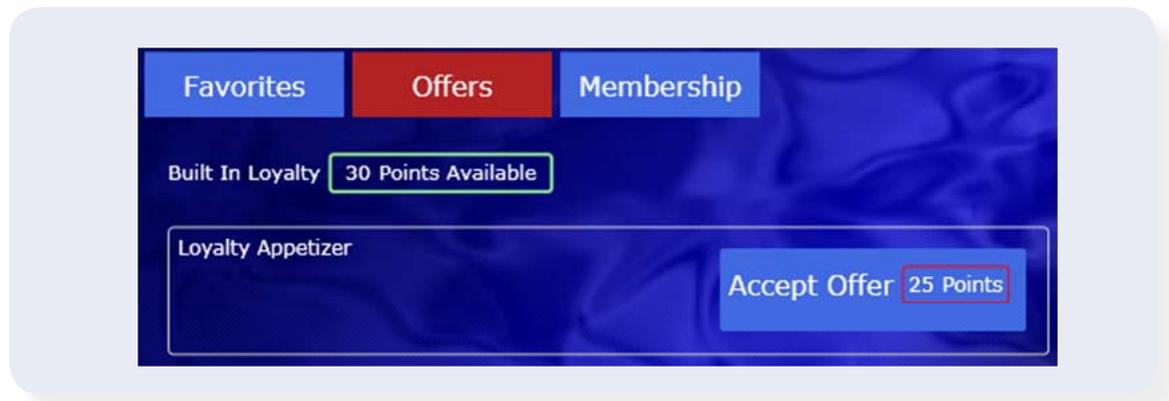
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6. Touch **'Add'** next to the desired program
7. The built in program will assign a new Member ID.
8. The First Data program will prompt the operator to swipe a membership card, or type the membership number

Point Balance and Offers

To view the program point balance and any offers, select the **'Offers'** tab.



If the provider has determined that offers are available, they are shown here.

Touch **'Accept Offer'** to accept any offer. If the offer could apply to more than one item on the ticket, the operator is prompted to choose a specific item.

To undo an acceptance, touch the item on the ticket and remove the discount, or the entire item.

Since offers are associated with a discount, the normal discount restrictions apply. For example, if the discount may only apply to appetizers, or only at certain times of the week, then the offer may not appear, or the offer may require qualifying items to be placed onto the ticket first.

Point balances will be deducted and/or accrued only when the ticket has been paid in full and finally closed.