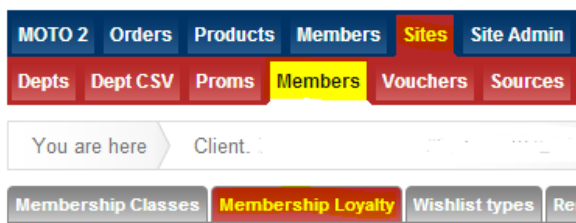# Etail Systems Tip Sheet

Objective: To create your loyalty scheme & select all your various options.

The following tells you how to achieve this;-

A loyalty points scheme has a whole host of benefits – from making people continually buy from you as they want to collect points, to customers leaving reviews in exchange for points.

You can set up your loyalty scheme by going into Sites > Members > Membership Loyalty

There are two different types of loyalty scheme:-

Standard – you decide how many points each product is worth, & how much a point is worth e.g. 1 point = 1p. So if someone buys something worth 100 points, they're receive £1 worth of loyalty points.

Viral – the viral scheme is best described in a flow chart. In short, the more people invite their friends, the more points that initial person gets – they don't get any points from products they buy themselves. For more information on this, please ask for the Viral Loyalty Points PDF.

Initial Setup

First, you'll need to decide what to call your loyalty scheme. You could go traditional & just call it *Your Company's Name* Points, or you could go a little different e.g. if you sell meat online, it could be My Trotters! This will appear wherever there's a hyperlink or reference to your loyalty scheme on your site.

Next, you can add a bit of information about your scheme – this appears at the top of the loyalty points screen. If you give points in exchange for reviews, this is the perfect place to remind your customers of that.

You have three points options now:

Points Type – what are you calling your points? E.g. just points, or Trotters?

Points type short name – e.g. pts.

Points conversion rate – how much is each point worth? In our experience, this has ranged from 1p – 5p, but you need to decide this. This can be changed at any time.

Membership Conditions	
Maximum Membership Points	

There are various membership options:-

Membership Conditions – this is a great way to collect data e.g. a condition of the loyalty scheme is that they must sign up to your newsletter.

Maximum Membership Points – if you don't want anyone getting anything expensive for free, then you set a certain amount of points they can go up to before they can't earn any more.

Minimum order value	*
Minimum order spend	*
Membership Period	Months
Membership Renewal Notification Lead Time	Days

Minimum order value – does the customer have to spend £20 before getting any loyalty points?

Minimum order spend – if you don't want anyone getting anything for free, then you can set a cash amount that they have to spend on each order, after their loyalty point reduction.

Membership period – if you make people pay for their loyalty scheme membership, or you want to limit it before they have to sign up again, then you can set the amount of months this is e.g. 6, 12, 24, 36 – **please only enter numbers in this box.**

Membership Renewal Notification Lead Time – if you're using the above option, how many days' notice do you want to give you customers, reminding them their membership is about to expire?

Product Review points		The number of points awarded to a Member when they submit a Product review and the Review is approved.

Product Review Points – if you have reviews turned on & want to give points for reviews, how many would you like to give each review? **The points will only be added once a review is approved.**

Incentive Promotion Code – are you going to give your members an exclusive promotion code, as an incentive to sign up?

Incentive Promotion Code		Promotion code to apply to new Members as an incentive for them to sign up.
Status	New	
Save/Update		

Status – this is the status of your points scheme – the options are New, Live, Suspended & Dead.

Then you can click 'Save/Update' to save your options.

Viral Loyalty Points Options

If you're going the viral root, you have some extra options (please refer to the Viral Loyalty Points PDF for more information about how this works):

Upstream percentage points	[ ]	Percentage of points to award to 'Upstream introducing Member' when a Member earns points.
Upstream points only:	[ ]	Introducing Members do not earn points on their own purchases, only from Friends orders
Allow for Repeat Orders:	[ ]	Introducing Members gain points for Friends Repeat orders
Allow for Product Reviews:	[ ]	Introducing Members gain points for Friends completing Product reviews
Allow for Forms:	[ ]	Introducing Members gain points for Friends submitting Forms

Upsteam percentage points – what percentage of points do you want Person 1 to get from Person 2?

Tick the following boxes if you want each of these options enabling:

Upstream points only – as described previously, if you tick this box, members who buy products themselves don't get points – instead, they get points from the purchases their friends & family make – this encourages them to introduce as many people as possible so they get the biggest discount.

Allow for Repeat orders – this only applies to our meat box clients. If someone invites their friends, they get points on all their friends & family's repeat orders.

Allow for Product Reviews – members get points if their friends & family leave product reviews.

Allow for Forms – if a member's friends or family input a form, they get points.

If you click the 'Save/Update' button, this will save your changes.

If you have any questions about the loyalty scheme, please call 0844 482 0908 or email support@etailsystems.com