# **VEEZI LOYALTY USER GUIDE**



### Welcome to the Veezi Loyalty guide

This guide is help you get the most out of Veezi Loyalty. We will run through the initial set-up and then show how to use the system in your daily operations.

This guide is divided into four sections.

Section One: Initial setup for Veezi Loyalty in Back Office

Section Two: Initial setup for Veezi Loyalty in POS

Section Three: Using Loyalty via POS

Section Four: Using Loyalty via V-Tix/Online

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## **SECTION 1: INITIAL SETUP FOR LOYALTY (BACK OFFICE)**

1) To install Veezi Loyalty, login to your back office, click on 'additional modules', then under the Loyalty section, click on 'Install'. The screenshot below (figure 1) shows the set-up page.

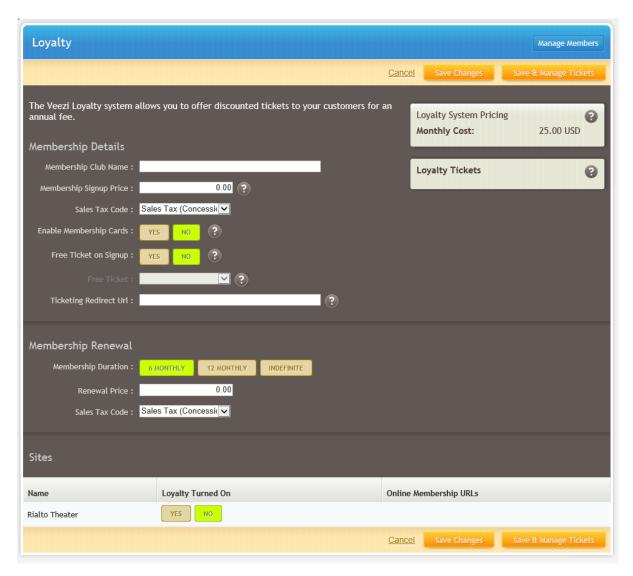


Figure 1: Set-Up Page

Next, we'll go through all the various fields – and explain what information is required for each field.

### Membership details

- Membership Club Name: Enter the name of your loyalty club.
- **Membership Signup Price:** This is the price that you want to charge your patrons for being a loyalty member.
- Sales Tax Code: Assign the appropriate code dependent on your countries tax requirements as needed. There are three options, 'sales tax (box office)', 'sales tax (concessions)' or 'tax exempt'.
- Enable Membership Cards: If you enabled member cards, we will provide you with a batch of unique numbers that you can use to have cards printed. These numbers will be visible when you open the form after submitting it. It will then show up below this button.
- Card Number Range: If you want to have printed member cards, once you've 'enabled membership cards' Loyalty will auto-generate a set of 16 digit numbers unique to your cinema. Ensure that you use only these numbers.
- Free Ticket on Signup: Select 'Yes' if you want your customers to get a free ticket on sign-up.
- Free Ticket: Assuming you have selected 'yes' to 'free ticket on sign up', this is where you select which specific ticket you want it to be. When you set up for the first time, you won't be able to see any tickets in this drop-down box because you haven't set them up yet. All you need to do is to finish this page and click 'Save & Manage Tickets'. You can then create your loyalty ticket and once complete, they will then show up in the drop-down box. Also, you can't choose 'yes' to a free ticket without having a loyalty ticket first.
- **Ticketing Redirect URL:** This is the link that you can type in (or 'Cut and paste') for where you want your customer to go if they want to book tickets after they have updated their details. The simplest thing to do here is to enter your home page address.

### **Membership Renewal**

- **Membership Duration:** Select the length of the membership you wish to have for your club; '6 Monthly', '12 Monthly' or 'Indefinite'.
- **Renewal Price:** The price you want to charge your loyalty club members for renewal. It can be free if you don't want to charge a fee for membership.
- Sales Tax Code: Assign the appropriate code dependent on your countries tax requirements as needed. There are three options, 'sales tax (box office)', 'sales tax (concessions)' or 'tax exempt'.

### Sites

### This is where we turn Loyalty on

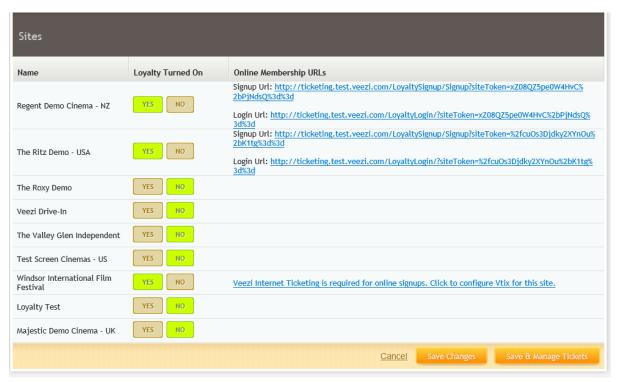


Figure 2: Sites-turning Loyalty on

- Name: All associated sites under your Veezi account will appear here, and it's important to note that the names in the example above are just for our test purposes only!
- Loyalty Turned On: This is where Loyalty gets turned on. If you want to sell memberships online, you'll need to have V-Tix installed. If you have V-Tix already, when you click 'yes', then 'save changes', Veezi auto-generates both a signup and a login Url. If V-Tix is not being used by your business, then you get this message; 'Veezi Internet Ticketing is required for online signups. Click to configure V-Tix for this site'. When you click on that link, you will be taken through to the V-Tix setup screen (figure 3). Configure that module to your specifications, once done, you can return back to the Loyalty setup process.



Figure 3: V-Tix Set-Up

- Online Membership URLs: As mentioned prior, the URLs which are auto-generated (once you've turned on Loyalty), are able to be used by your web developer for the initial setup of V-Tix for your online ticketing including loyalty ticket sales. When you click on the sign up URL, you go through to a sign in page like the following example (figure 4)
- If you set up the membership to be free, then a member will be created on submit. Otherwise it will redirect via the payment provider you configured on V-Tix and take payment before creating a member.

ABCCINEMAS				
	MEMBERSHIP SIGN UP			
* First Name :	Mobile Phone :			
* Last Name :	Address 1 :			
* Email Address :	Address 2 :			
* Password :	City:			
* Confirm Password :	Zip Code :			
Date of Birth :	State :			
Home Phone :				
	Submit			

Figure 4: Membership Sign-Up

• When you click on the 'Login URL' you'll go through to the Loyalty Member Login page (figure 5). Nb. Both figures are just to highlight what you'll see - from *your* customer's point of view.

ABCCINEMAS	
MEMBER LOGIN	
Email Password  Log in	
Forgot password? Membership Signup	

Figure 5: Member Login



- 'Cancel' Button: Click on this if you decide not to continue with the Loyalty setup.
- 'Save Changes' Button: Click on this to save all the changes you've made.
- **'Save & Manage Tickets'** Button: Clicking on this will take you through to the *'Ticket Types'* page, where you be able to add all the various Loyalty Tickets that you intend to sell. A good tip here is that rather than creating a new ticket from scratch, just simply copy an existing ticket but then rename that ticket with *'Loyalty'* somewhere in the title. Remember to make these new tickets *'Is available to Loyalty Members Only'*. Otherwise, you'll be giving discounted prices to all other customers! Great for them, not so great for your bottom line though. Additionally, you won't be able to sell loyalty tickets to your loyalty members until you've both created the loyalty tickets and added them to the applicable price cards.

Once you've completed the above, the next area to set up is in the 'Manage Members' area. (Figure 6 below)

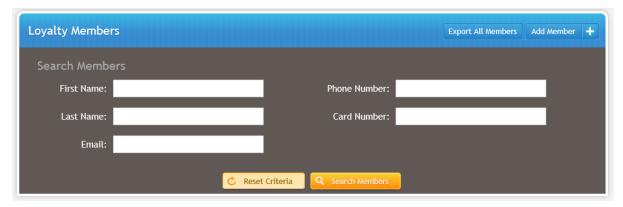


Figure 6: Manage Members

- **'Export All Members'** Button: Clicking on this will open (or save) your Loyalty Member list as a CSV file from your database. You might like to use this list for an email newsletter list.
- **'Add Member'** Button: This opens the 'Create Member' box so you can add the details of your new Loyalty Member (figure 7 below).
- 'Reset Criteria' button: Clicking on this button will clear all the details (in any of the five fields) and allow you to retype new member details into the search facility.
- 'Search Members' button: to search for any Loyalty Member, enter any relevant data into any of the five fields (First Name; Last Name; Email; Phone Number; Card Number) and then click the 'Search Members' button. You will then get a list of member details similar to the example in figure 8 below. Note. If membership cards are disabled in loyalty settings, then the card field is disabled



Figure 7: Create Member

The first three fields are mandatory, all the others (bar 'Site associated with') are optional. For 'Site associated with' this is to determine which specific site you want to associate for a loyalty member – if you are a multi-site Veezi customer. If you are a single site, then this does not apply! Click on 'Save member' to save the new Loyalty Member details.



Figure 8: All Member Details

Clicking on 'Member Id' will bring up the 'Edit Member' Screen. Here, you will be able to modify the members. (Figure 9 - next page)



**Figure 9: Edit Member Details** 

Once you've altered the members details, click on 'save' to save that updated information. You can at this point, cycle through the member list one member at a time, by clicking on either the 'previous' or the 'next' buttons. As usual, the mandatory fields are marked with a \*red asterisk.

This concludes the initial set up of Veezi Loyalty in your back office. In the next section of this guide, we'll look at how Loyalty works in Veezi POS.

### **SECTION 2: INITIAL SET UP FOR LOYALTY (POS)**

Thankfully, most of the hard work has already been done for you! Before you can start selling those Loyalty tickets, you'll need to make Loyalty ready via the following set up.

- A) Firstly, you don't need to create the new concession items in Veezi Back Office. When you activated the Loyalty option in the initial setup, it automatically created both the 'Loyalty Member Signup', and the 'Loyalty Member Renewal' concession items. And you would have set the Loyalty prices according to your designated rates that you're planning for your Loyalty Members. Note. This is an auto set up based upon your Loyalty settings.
- B) If needed/desired, you can add your Loyalty buttons to your concession profiles which will then be pulled into your concession screen on Veezi POS. It is important to note here that this is only necessary if you're going to be selling Loyalty memberships via your POS. And that you don't absolutely have to have specific Loyalty buttons either you can just use the 'search' button to find the Loyalty buttons.

#### Create Loyalty POS Buttons + Associated Data

Before you create the Loyalty POS buttons, there are still a couple of other areas to look at. From Veezi Back Office, click on 'Food & Items', then click on either of the two new Loyalty Concession Items ('Loyalty Member Setup' & "Loyalty Member Renewal') Figure 10.

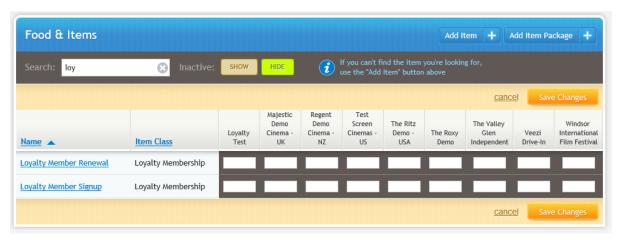


Figure 10: Edit Loyalty POS Buttons Screen

#### **Edit Loyalty Item**

This opens up the 'Edit Item' screen, where you can, if you wish, add, delete or modify the information contained within this item. Figure 11

**Important note:** We need to stress here that although you can alter the price related data (Amongst the other options that are editable), this will not be reflected anywhere else. The Loyalty Signup/Renewal pricing is controlled by the configuration in the initial Loyalty setup screen. You probably won't need to alter anything else for this type of item, but if you need to, we've added the following information.

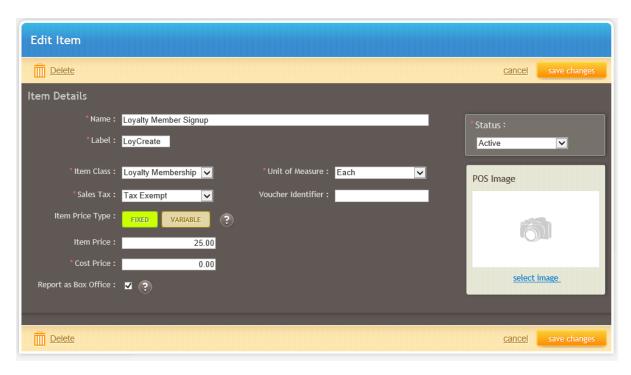


Figure 11: Edit Loyalty Membership

- Name: \*Mandatory Field. The 'Loyalty Member Signup' is automatically pulled in when you activated Loyalty initially.
- Label: \*Mandatory Field. Short name that gets shown on the concession profile.
- Sales Tax: \*Mandatory Field. You will have already set this in the initial set up, but the drop down menu allows you to change it.
- **Item Price Type:** How is this price presented in POS? If the type is variable, then the operator will be asked to enter the price every time they sell the item at POS and you will not be able to specify a price per site. For this type of item, you would be best then to set it as 'fixed.
- **Item Price:** Again, this figure is automatically pulled in with the initial Loyalty setup, change it if you need to.
- **Cost Price: \*Mandatory Field.** You might want to add a cost associated with them. Although, for membership costs, it is where it is fine to leave it set at '0.00'.
- Report as Box Office: If the checkbox is selected, the item (loyalty Membership) will be reported as a Box Office item, and will not be included as part of 'Spend Per Patron' calculations.
- **Unit of Measure: \*Mandatory field.** Each will be the automatic default here, the other options relate to items such as food & drink etc.
- Voucher Identifier: Not used for Loyalty. Ignore!
- **Status: \*Mandatory Field.** If you make it *'inactive'*, then you won't be selling loyalty memberships/tickets.
- **POS Image:** Giving you the option to add a graphic to your Loyalty POS buttons.

### **Add Loyalty Concession Buttons**

The last step for Loyalty setup is to add Concession Buttons – so you can sell Loyalty at POS.

First, click on the Concession Profile where you want to add these new Loyalty Buttons. Then choose the most appropriate tab to locate them in.

Next, click on an empty box, which will then bring up the profile button screen (Figure 12 below).

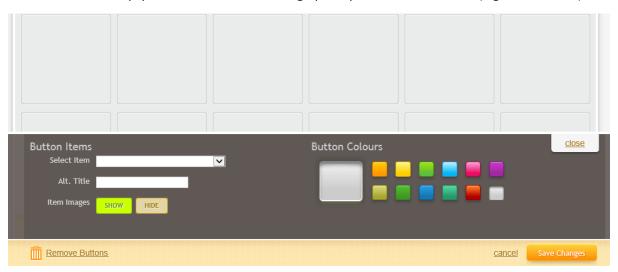


Figure 12: POS Concession Profiles

- **Select Item:** Clicking on 'Select Item' will open the drop down menu, scroll down to the Loyalty item needed.
- Alt. Title: Option to add an 'Alt (alternate) Title. This wording is what will be visible on your POS button.
- Item Images: Giving you the option to either show or hide the item image.
- Button Colours: Choose the colour you want for these two buttons!

Once you click on 'Save Changes', you have now finished the Veezi Loyalty Setup.

### Congratulations!

Now that the setup is all complete, we can turn our attention to how to you actually use Loyalty – both from POS – and from Online.

### **SECTION 3: USING LOYALTY IN POS**

In this section, we'll be looking at how you will be using Loyalty at both POS and Online - for the purpose of selling Memberships & Tickets to your much customers.

### **Selling Loyalty Membership via POS**

1) From your concessions tab, locate your 'Loyalty Member Signup' button, click on the button. (figure 13)



Figure 13: Loyalty Buttons-POS

2) This will bring up the 'Swipe Loyalty Card to be Purchased' screen (Figure 14 – next page)



Figure 14: Swipe Loyalty card to be Purchased

- 3) Next, Swipe/Scan your Cinema Loyalty Member Card to activate the card, then enter the customer. Note that A) the mandatory fields are: First Name, Last Name and Email. All other fields are optional, although getting a Mobile phone can be very handy for future reference and B) if you don't sue cards, there is no need to enter a card number.
- 4) Also, it's extremely important to note here that the 'Activate' button does not do anything! It is part of the foundation software that Veezi is built on. Instead, once you've finished inputting your new Loyalty Members data, click 'Enter' to save those details.
- 5) The Loyalty Membership Signup amount is now in your POS order window. If needed, add any additional items and complete the transaction in the usual way.
- 6) For security reasons, we have designed the system so that you can only process one Loyalty Membership at a time even if you have a combination of both a signup and a renewal. If you do try to sell more than one, you will receive the following message (Figure 15)

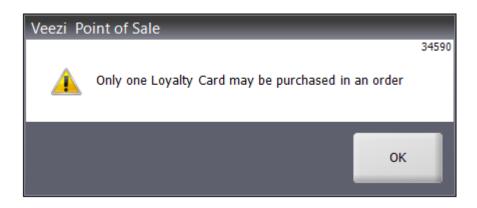


Figure 15: Loyalty Membership Message

### **Renewing Loyalty Membership via POS**

1) Renewing Loyalty Membership via POS uses the same process as selling a new Loyalty Membership.

### **Selling Loyalty Tickets via POS**

To be able to successfully sell a Loyalty ticket via POS, you should select the Loyalty member first - before you start the sales transaction.

From the POS screen, select the 'More' button, which opens the options screen, then click 'Loyalty'. The Loyalty screen opens as per the screenshot below (Figure 16).

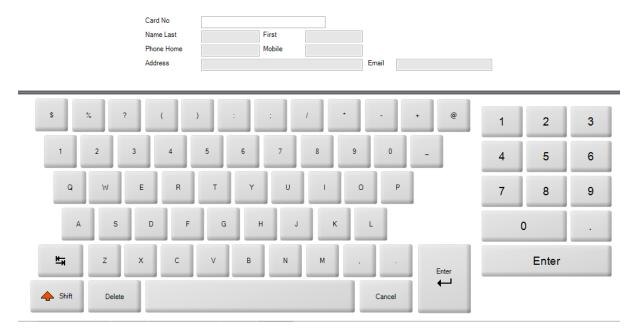


Figure 16: Swipe Loyalty Card

From here, you can either swipe the member's card, or search manually by entering data in any of the fields available. A partial search will potentially bring up a large number of members, so the more data you enter here, the quicker you'll find the member.

Once you've entered the member details, click on 'Enter' button to find the member (Figure 17).



Figure 17: Select Loyalty Member

Once you've selected the member, the Loyalty Member welcome screen opens up as per the screenshot below (Figure 18).

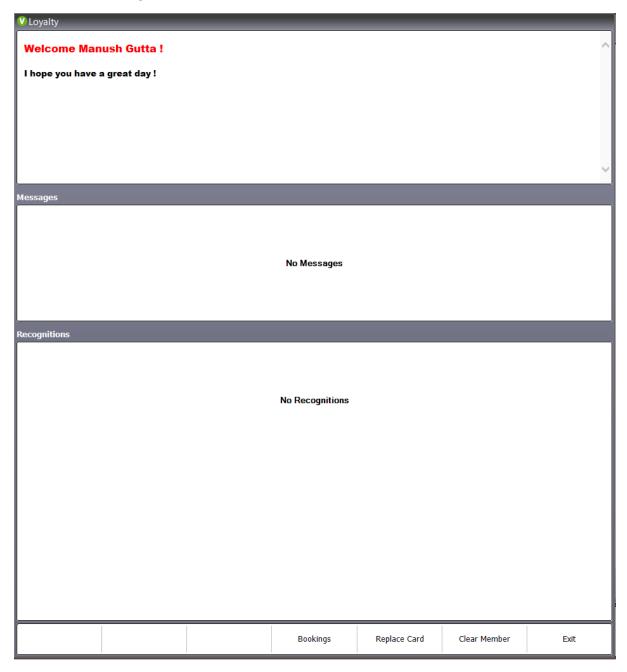


Figure 18: Loyalty Member details

From this screen, you can do the following options.

- **Bookings:** Find an existing booking for this member
- Replace Card: Replace the member's card.
- Clear Member: Clear the current member selection and find another member
- Exit: Exit this screen to take you to the sales screen for selling to the loyalty member
- **Recognitions:** If there are any recognitions (free tickets) they will appear in the recognitions screen

• Messages: \*Not currently used. In future though, any messages for your member will appear here.

For the sales process though, click on the 'Exit' button to take you back to the main POS screen. Once back there, you can begin selling to your Loyalty member. Remember to click on the appropriate Loyalty ticket(s) to ensure that your Loyalty member gets their Loyalty pricing!

### **SECTION FOUR: USING LOYALTY VIA V-TIX**

In this section, we'll show you how your customers can use the following options:

- 1) How they can join your loyalty club (via V-Tix),
- 2) How they can purchase loyalty tickets online,
- 3) How they can add/change passwords
- 4) & personal data,
- 5) How they can renew their membership online.

### **Joining your Cinemas Loyalty Club**

The first step for your members is to register as a Loyalty member of your cinema via the membership sign up page (figure 19). Once they've joined, they will then be able to select the Loyalty pricing for the show they are planning to attend. Loyalty tickets will not be selectable otherwise.

If your customer doesn't join as a loyalty member beforehand, they will still be able to sign up to become a loyalty member at the ticket booking page on your website.

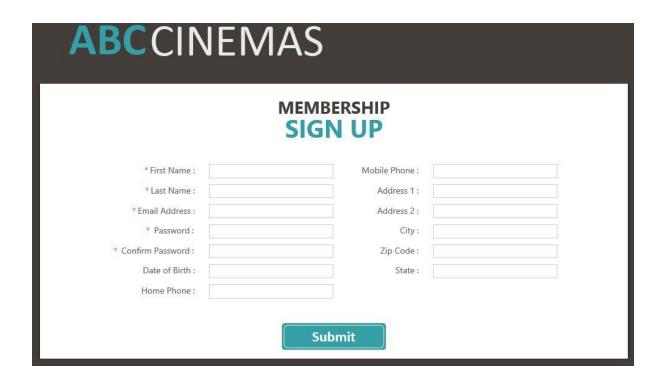


Figure 19: Loyalty Membership Sign-Up

As with similar set up pages, those fields marked with the ubiquitous 'Red Asterix \*' are mandatory fields that must be filled out. Once filled out, clicking on the submit button will take them through to the payment screen (Figure 20).

Note. If your membership is free, then the customer will be redirected straight back to the film selection screen.

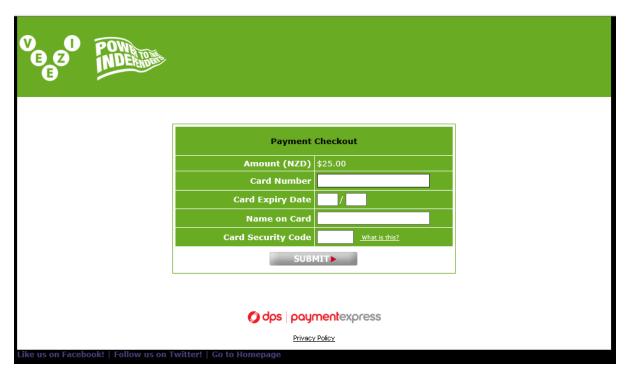


Figure 20: Payment Checkout

Once the card payment details have been entered – and payment is verified, that customer is now a loyalty member of your cinema! The first we hope, of many returns to your cinema.

From here, they will return to the booking screen for the movie they wish to purchase loyalty tickets for (which is part of the normal V-Tix online booking process).

If the customer forgets their password, they will click on the 'Forgot password?' button to get sent a 'reset password' email so they can change their password (Figure 21).

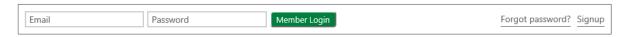


Figure 21: Login screen

**Note.** As with the POS setup, your Loyalty member will not be able to select more than 1 free loyalty ticket per transaction. They can also currently select up to 10 Loyalty tickets per transaction.

### **Purchasing a Loyalty Ticket Online**

Now that you have your customer as a loyalty member, here is the very straight-forward process for making a loyalty ticket purchase from your cinema.

- 1) They login with their loyalty details (Email Address + Password)
- 2) They select the Loyalty ticket (Plus any additional 'non-loyalty' (normal/regular) tickets)
- 3) Enter their card details
- 4) Purchase completed!

If in the event that a problem arises with payment, the customer will get the message shown below (Figure 22).

# **SORRY!**

There was a problem processing your payment. You have been charged. Please contact the cinema.

#### Figure 22: Sorry!

The customer will then contact your cinema to arrange for help with reissuing their tickets – or for a refund.

Alternately, they could also get the below message – where they haven't been charged, but their transaction encountered issues (Figure 23)

# **SORRY!**

There was a problem processing your payment. You have not been charged. Please go back and try ordering again.

#### Figure 23

At that point, the customer is directed to go back and re-try booking again.

### **Loyalty Membership Options**

There are three options available to a Loyalty member once they've logged in to your membership page (Figure 24)

- 1) Change Password: Change their password
- 2) **Update Personal Details:** Update their personal membership details
- 3) **Renew Membership:** Renew their membership. Note: If the membership is not within 2 months of being expired, they will not be able to select 'renew membership'.

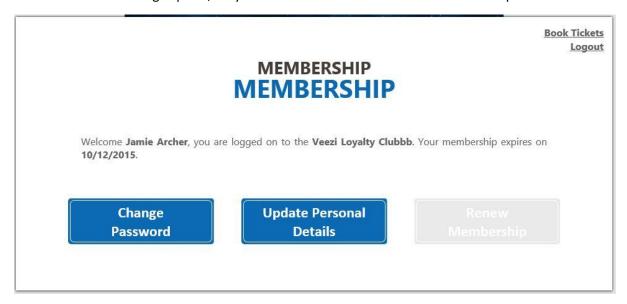


Figure 24

**Change Password:** As with any web-based system, giving your much valued customers the option to change their password is a fundamental right that is undeniable (Figure 25).

- 1) Member clicks on 'Change Password'
- 2) Enters their new password (twice)

Clicks either 'Submit' or 'Cancel'



Figure 25

**Update Personal Details:** To update a member's details, they'll need to use the following process. (Figure 26)

- 1) The member logs in to the membership page
- 2) Click on 'Update Details', add/change their personal data as needed
- 3) Click 'Cancel' if they change their minds or 'Update Details' to confirm updated changes

MEMBERSHIP DETAILS				
* First Name :	Jamie	Address 1 :		
* Last Name :	Archer	Address 2 :		
* Email Address :	jamie@ekiwi.com	City:		
Date of Birth:		Zip Code :		
Home Phone :		State :		
Mobile Phone :				
	Cancel	Update Details		

Figure 26

Once they've completed updating their details, they can either continue on to book tickets or logout altogether.

Renew Membership: To renew a membership, your customer will use the following process.

- 1) Click on 'Renew Membership' (Figure 27)
- 2) They will see the membership renewal cost + the length of membership renewal (Figure 28)
- 3) They will then be taken to the payment page, enter their credit card details
- 4) Once they've confirmed payment for renewal, they can either logout, or continue on to make a booking.

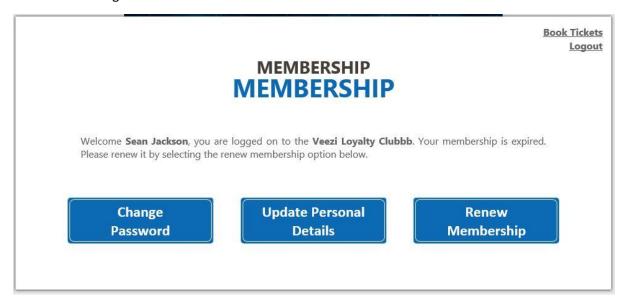


Figure 27

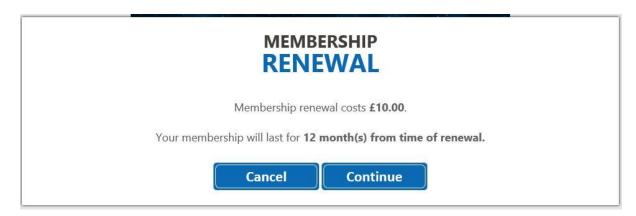


Figure 28

This concludes the Veezi Loyalty Guide. If you have any questions, suggestions, etc. about any aspect of this guide, please don't hesitate to contact us at your earliest convenience.