

BONUS POINTS

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OVERVIEW

GETTING STARTED

There are many ways to use Bonus Points to increase turnover for your business, but first it needs to be activated.

The first half of this document will guide you through the six easy steps to activate and use your Bonus Points. The second half of this document details ways that you can use the Bonus Points module to best suit your business.

We highly recommend on-site consultation to assist in the set-up of a loyalty system for your business. The helpdesk facility should not be used as a substitute for professional consultancy and advice when setting up a loyalty program.

HOW DO BONUS POINTS WORK?

Bonus Points are used in VetlinkPRO as a discount scheme for clients. Once the client joins the Bonus Points scheme, they will collect points on the products and services purchased from your business. You determine the amount they collect for each product and service. Over time the Bonus Points will accrue, and clients are then able to redeem these Bonus Points for products or services that you nominate.

BONUS POINT REDEMPTION

According to Inland Revenue and tax law, loyalty points should be treated as a discount at redemption. They can be considered like a promissory note that can be used by clients when they purchase a product.

To meet this standard, bonus point redemption in VetlinkPRO is treated as an overall discount on the total bill. This is because redemption of points does not influence payment-based GST and is not considered a method of payment.

WHAT HAPPENS WITH A DISCOUNT?

Discounts can be applied manually or automatically through the system. Regardless of the method, the bonus points applied to the product record will still be collected by the client as long as the discount is not 100%. If the discount is 100% bonus points will be zeroed as well. When offering discounts, this is something that should be considered so as to not disadvantage the clinic by over-discounting. For the different levels of client discounts, Bonus Points that are to be received can be entered by the clinic, but putting a discount manually on the bill will not affect the Bonus Points.

BONUS POINT BEHAVIOUR AT BILLING

Discount on Bill	BP Given
Item Pack Sell / Unit Sell is zero	NO BP Given
100 % Discount on Bill Item	NO BP Given
Change Bill Item Price to Zero	NO BP Given
Change Bill Item Price (up or down)	BP Given
Payment made by BP	BP Given
BP on Complex Product Component (where Price/Disc from comps set to 'Yes')	BP Given

*Bonus points cannot be adjusted on the billing screen and will not recalculate when item price changed on the bill apart from when it is changed to zero.

*Some behaviour may be varied depending on the version you are running. Please contact the helpdesk for up to date status or trial with sample cases before 'live' implementation.

FACTORS TO CONSIDER

VetlinkPRO is able to be configured so that all Bonus Points are automated at the point of sale. There are some important factors to consider when determining whether or not a product should be allocated Bonus Points.

1. Supplier participation. If a supplier does not want to participate in the Bonus Points system, no points need to be allocated to their products. However, it should be explained to them that other companies are participating, and clients are more likely to purchase products that they will receive points on.
2. The cost to the clinic. If a service has a high cost associated to it due to the materials used, we recommend you allocate fewer points to that service. This also applies to low margin products. While you want to reward your clients, you do not want to disadvantage your business.
3. Points can be claimed on anything as the system does not analyse items inside a bill when the bill is being paid at POS. Any items that you do not want Bonus Points to be redeemed against should have a 'Show on Bill' note created so that staff members are informed at the time of billing. The steps of how to do this are included in this manual.
4. There is no relationship in the product file between Bonus Points and the price of the product. This means that if the price is increased, the number of Bonus Points to be collected will have to be adjusted manually.
5. 1 point = 1 cent so 100 points = \$1. This is fixed in the system and cannot be changed.

HOW TO SET UP BONUS POINTS

ACTIVATION OF BONUS POINTS

1. Go to the **Options** menu and select **Picklist Setup | Loyalty | Bonus Point**.
2. Expand the **Bonus Point** menu and select the **Default**.
3. Set **Status** to **Active**.
4. Set the expiry date of points in the **Expires After** field.
5. Set the redemption threshold in the **Minimum Required** field.
 - E.g. The clients must have accrued xxx points before they can redeem points.
6. Click the **tick** in bottom right-hand corner to save.

Bonus Point

▼ Bonus Point

Default

Scheme Name: Default Status: Active

Expires After (Months): 4 from date of accrual

Minimum Required: 1140

GL Liability - Gained: 601.1 My BP Gained (Liab)

GL Liability - Used: 601.2 My BP Used (Liab)

GL Liability - Expired: 601.3 My BP Expired (Liab)

GL Expense - Gained: 280.1 My BP Gained (Exp)

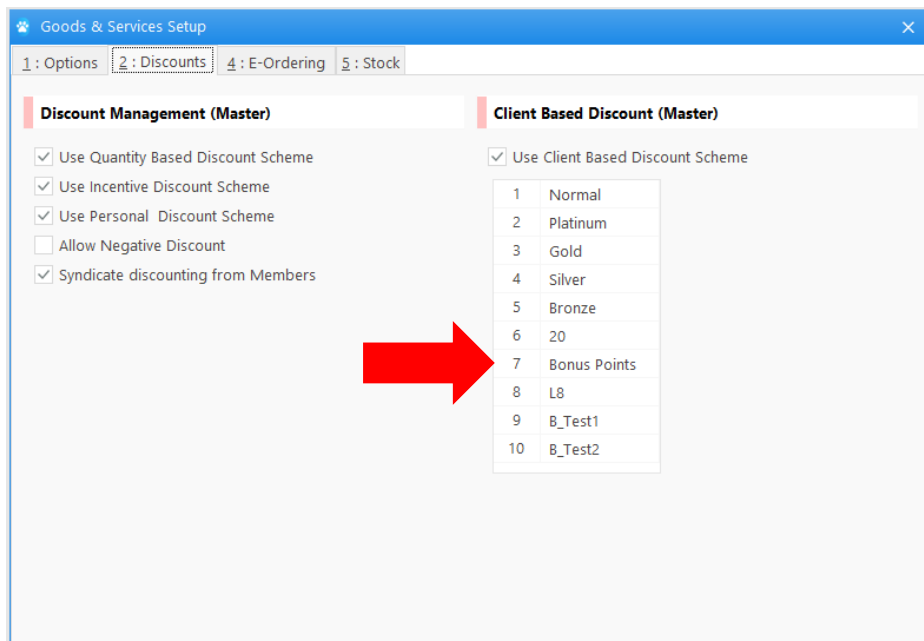
GL Expense - Expired: 280.2 My BP Expired (Exp)

Exit

SETTING UP THE DISCOUNT PRICING LEVEL

Multiple levels of point's accrual can be setup and clients can be linked to different levels. You can also choose to have all client on the one pricing level if required. To set up the pricing levels:

1. Go to the **Options** menu and select **Setup**.
2. Log in with your Staff ID and password.
3. Click the **Product** button and select the **2: Discounts** tab.
4. Type the name of the pricing level in the next available field i.e. Bonus Points.
5. Save changes made when closing the setup window.



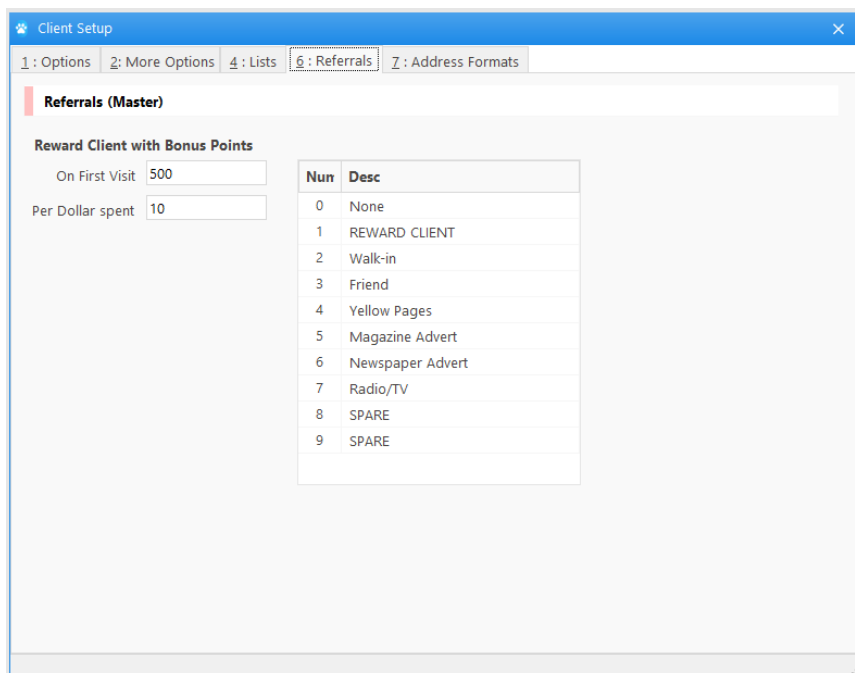
SHOWING BONUS POINTS EARNED ON OPEN BILLS

1. Go to the **Options** menu and select **Setup**.
2. Log in with your Staff ID and password.
3. Click on the **Billing** button and click on the **Profile** tab.
4. Tick **Display Bonus Points in Billing Grid**.

REWARDING EXISTING CLIENTS FOR REFERRING NEW CLIENTS

The referral list, by default, is populated with two types of referrals. They are **'None'** and **'REWARD CLIENT'**. Follow the steps below to enter your own referral types.

1. Go to the **'Options'** menu then click on **'Setup'**.
1. When setup has loaded click on the **'Client'** button and go to the **'5: Referrals'** tab.
2. On the right-hand side of the page is a list of referral names. You can now add to this list or edit the types already entered.
3. If you have selected **'Reward Client'**; the existing client who referred the new client can receive bonus points on the new client first visit. The existing client can receive a flat rate, or they can receive points depending on how much the new client spends.



Nun	Desc
0	None
1	REWARD CLIENT
2	Walk-in
3	Friend
4	Yellow Pages
5	Magazine Advert
6	Newspaper Advert
7	Radio/TV
8	SPARE
9	SPARE

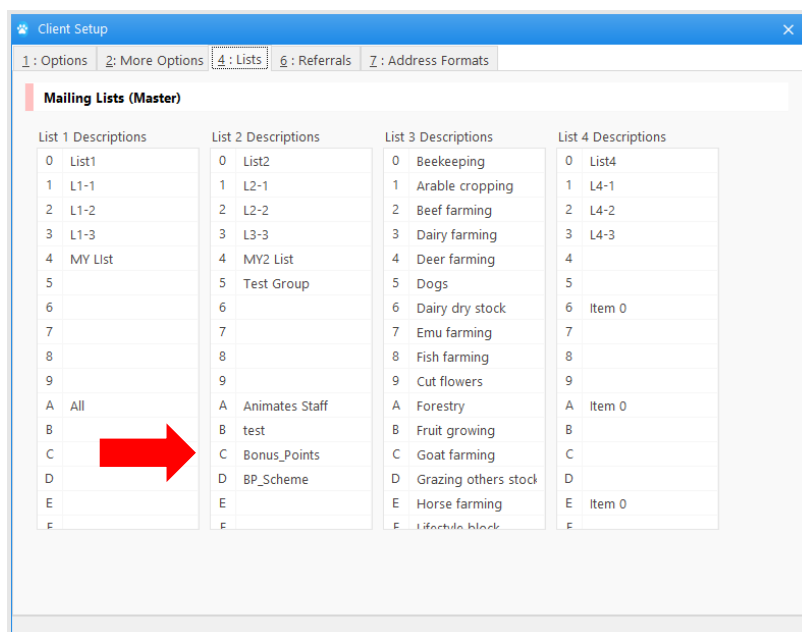
HOW TO SET HOW A CLIENT WAS REFERRED

1. Open a client record and click on the **'More'** tab.
2. Click on the ellipsis button next to the referral field to add in referral details.
3. The referral window will open. Select how the client was referred to your business from the **'Referral Type'** Pick List.
4. If the referral was from another client, you can select the referring client in the **'Referred By'** field.
5. Click **'OK'** to save and exit.

SETTING UP THE MARKETING TAB

If you require clients to sign up the bonus points scheme you may want to create mailing lists so you can easily identify clients on the scheme.

1. Go to the **Options** menu and select **Setup**.
2. Log in with your Staff ID and password.
3. Click on the **Clients** button and click on the **3: Lists** tab.
4. In any of the **List 1 Descriptions** sections, enter a name i.e. BP_Clients on the next available line.
5. Close out of **Setup** saving changes if prompted, then close right out of VetlinkPRO and reopen to allow these changes to take effect.



ALLOCATING BONUS POINTS TO PRODUCTS

1. Search for the product you want to allocate Bonus Points to.
2. Open the **4: Discs** tab.
3. In the **Client Discounts** section there is a Bonus Points column. Enter the amount of Bonus Points you wish to be received in the selected pricing level e.g. **BP_Client**. You may allocate points to as many pricing levels as you wish.
4. Arrow down and a red tick will appear in the bottom right-hand corner. Click to save the record and then click **OK**.



NOTE: 1 point = 1 cent so 1000 points = \$10. This is fixed in the system and cannot be changed.

Advance Cat Beef & Cheese (100gm) (Product# 1/3756)

1 : General 2 : More 3 : Stock 4 : Discs 5 : Complex 6 : History 7 : Stats 8 : Doc Mgr

Client Discounts

Num	Disc Name	Disc %	Disc Sell	Bonus Pt:	ID %	ID Sell
0	Normal	%	\$2.90	29	10%	\$2.61
1	Platinum	%	\$2.90	29	10%	\$2.61
2	Gold	%	\$2.90	29	10%	\$2.61
3	Silver	%	\$2.90	29	10%	\$2.61
4	Bronze	%	\$2.90	29	10%	\$2.61
5	20	%	\$2.90	29	10%	\$2.61
6	Bonus	%	\$2.90	29	10%	\$2.61
7	L8	%	\$2.90	29	10%	\$2.61
8	B_Test1	%	\$2.90	29	10%	\$2.61

Quantity Discounts

Num	Qty	Disc %	Sell
0	0	%	\$2.90
1	0	%	\$2.90
2	0	%	\$2.90
3	0	%	\$2.90
4	0	%	\$2.90
5	0	%	\$2.90
6	0	%	\$2.90
7	0	%	\$2.90
8	0	%	\$2.90

Variable Pricing (Unit Price)

Num	Description	Unit Price (Excl.)	Unit Price (Incl.)
> 1	Advance Cat Beef & Cheese	\$2.52	\$2.90

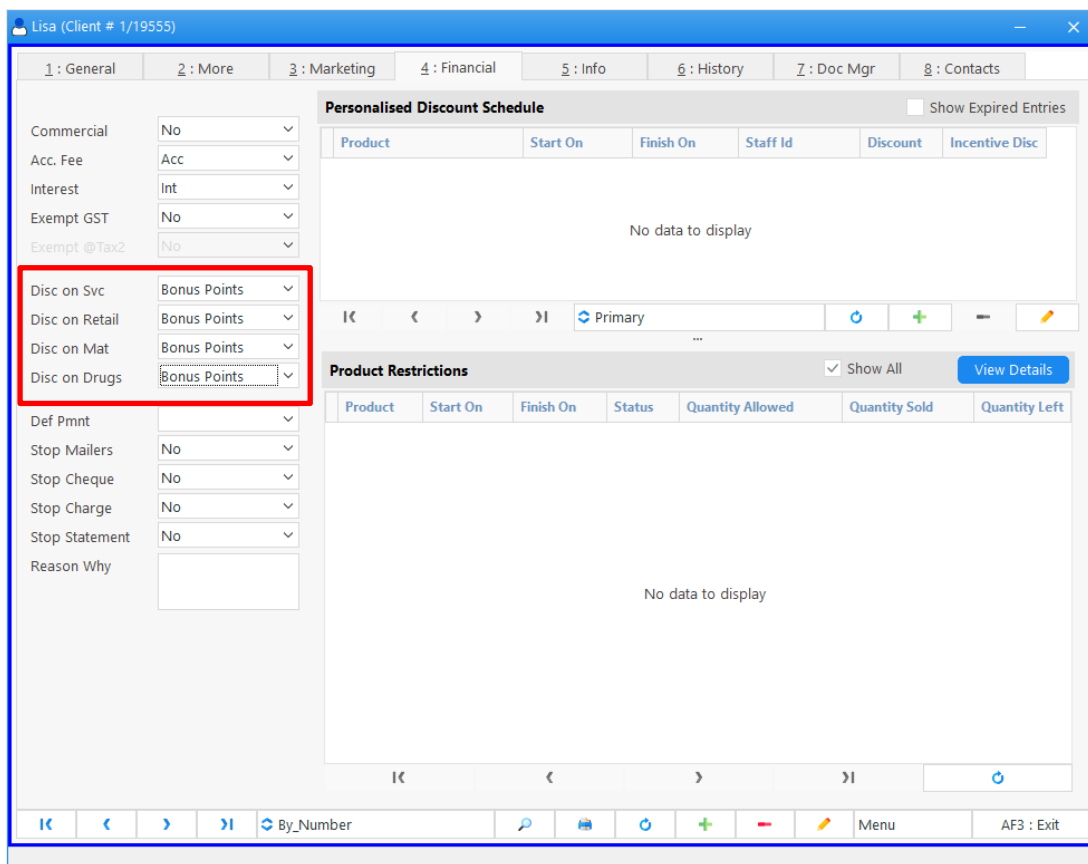
By_Order

By_Number

Menu AF3 : Exit

ALLOCATING CLIENTS TO THE BONUS POINTS SCHEME

1. Search for the client.
2. When the client record is open click on the **4: Financial** tab.
3. The **Disc on Svc** and **Disc on Retail** fields should both be set to the new pricing level that you created earlier (e.g. **Bonus points**).
4. Now open the **3: Marketing** tab in the mailing list section and click on the box beside the relevant mailing list option e.g. **Bonus points**.
5. By updating clients as they join the scheme, it will keep your records current and ensure that no one is missed.



INCENTIVE BONUS POINTS

Bonus Points may be allocated based on client balance. In particular, clients who are late paying their accounts can be prevented from getting bonus points. This just provides a further incentive for clients to pay accounts on time. For example, if a client has a balance owing greater than 1, 2, or 3 months (depending on setup) then don't allocate new points to the client. You can also specify an amount which must be exceeded before allocation is stopped. This can be enabled from [Options | Setup | Billing | 2: Master / Branch | Stop Bonus Point Allocation when Amount Due Exceeds](#).

When points are not allocated\cleared a message will be automatically added as a bill line item advising that points have been cleared. A custom note can also be enabled to print at the bottom of Tax Receipts/Tax Invoices. The note can be added from [Options | Picklist Setup | Bill | Bill Notes](#) then enabled to print on bills from [Options | Setup | Billing | Messages | Message on Clearing Bonus Points](#). Check out the VetlinkPRO Help from the application for more information.

SHOW BONUS POINTS AVAILABLE ON STATEMENTS

To print the bonus points available at the end of the month on statements go to [Options | Setup | Finance | Statements | Print Bonus Point Total Message](#).

ALLOCATING BARCODES TO CLIENTS

This will enable fast and accurate location of client records and will assist in rapid identification when they are just "popping in" for retail products. Multiple barcodes (key tags) can be assigned to client records, making them ideal for families.

1. Find the client record.
2. Click the [Menu](#) and select [Barcodes](#).
3. Scan in the barcode on the back of the key tag.
4. Click [OK](#) when prompted.
5. Click on the [Close](#) button.

By charging your clients (say \$5 for example) for the key tag, the business can recover the production costs, the cost of staff setting up the Bonus Points and potentially make a small profit as well.

STOP BONUS POINT ACCUMULATION ON OVERDUE ACCOUNTS

Enabling Stop bonus Point accumulation

1. Go to **Options** then **Setup**.
2. Click **Billing** button then **2: Master / Branch** tab.
3. For the **Stop Bonus Point Accumulation** option edit the **amount** and **period overdue** that you wish to stop bonus points for.

Printing Message on Bill when Bonus Points Stopped

1. Go to **Options** then **Picklists Setup**.
2. Go to **Bill** then **Bill Notes**
3. Click **+** button to add new note.
4. Give Note **Name**, set **Shared** to **Yes**, and type in note as to why bonus point accumulation stopped.
5. Save and exit note.
6. Go to **Options** menu then **Setup**.
7. Click **Billing** button then **Message** tab.
8. Select the note you created from the **Message on Clearing the Bonus Points** drop down menu.
9. Exit and Save setup.

PRINTING POINTS TOTALS ON BILLS

The system allows you to print out the client's Bonus Point total at the bottom of their bill (receipt or invoice) in a customisable message. This is a great way to keep them informed of their balance.

Creating the Message

1. Click on the **Options'** menu and select **Picklists Setup**.
2. Click on **Bill** and double click on **Bill Notes**.
3. Click on the red **+** (plus) button at the bottom of the form to add a new message.
4. Enter a name for the note e.g. **Bonus Points**.
5. Make sure the **Shared** field is set to **Yes**.
6. Type in the message you wish to display on the bill in the message box. Click on the **Mailmerge** button and add **BP_Total**. When the bill is printed this field will be replaced with the client's bonus point total.
7. Click on the **Save** button.

Attaching the Message to Bills

1. Click on the **Options** button and select **Setup**.
2. Log in with your Staff ID and password.
3. Click on **Bills** and click on the **4: Messages** tab.
4. From the **Message for clients with Bonus Points** pick list, select the bill note you created previously (e.g. **'Bonuspoints'**).
5. When a bill is printed the client's Bonus Points total will now print out on the bill.

REDEEMING BONUS POINTS

Once the minimum amount needed to use the Bonus Points is reached, the system will automatically display how many points can be redeemed for that transaction as well as the remaining balance. When taking payment, the system will ask if the Bonus Points are to be used. If the client does not wish to use them, then this payment method can be overridden. It is an excellent way to keep clients informed of their total and to encourage their use.

Payment for Tax Receipt 1/815428

Bill Total			
Total Sales	\$142.80	Account Paid	\$0.00
Total	\$142.80	Total w I Disc.	\$128.52

Bonus Points			
Available	\$20.85	Use	<input type="text" value="20.85"/>

Payment Method		
Type	Amount	Reference
No data to display		

✓ ✕

Balance to Pay	\$128.52	Rounding	
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CHECKING POINTS TOTALS & HISTORY

For a client to find out their Bonus Points total, they can:

- Call the business – The total can be obtained on screen from the client record.
- Receive a personalised monthly statement sent to them by the business.
- Go to your website to check (if it is an integrated P2P Limited website).

Checking the Bonus Point Total from the Client Record

1. Find the client record by clicking on the **Client** button and performing a client search.
2. Click on the **5: Info** then click on the **Bonus Points** tab.
3. Here you will be able to view how many points the client had gained, used, has available and the expiry dates of the points.

The screenshot displays the 'Kate (Client # 2/41512)' record in the VETLINKPRO system. The 'Bonus Points' section is active, showing a table with the following data:

Bill	Date	Gained	Used	Available	Expiry	Referral
1/815427	13/04/2023	2085	0	2085	13/08/2023	

Below the table, the 'Total Available' is shown as 2085. The interface also includes fields for 'First Visit' (8/01/2005), 'Last Visit' (13/04/2023), 'Last Staff', '# Visits' (22), 'Since' (8/01/2005), 'Visit Freq.', 'Last Paid' (\$54.00), 'on Date' (6/01/2007), 'Bill Num.' (2/127444), and 'DD Acc' (Chq 1, Chq 2, Chq 3). The bottom of the screen shows navigation icons and a status bar with 'By_Number', 'Menu', and 'AF3 : Exit'.

TIPS AND TRICKS

POINTS APPEAR ON BILLS BUT NOT CLIENT BALANCES

The situation may exist where bonus points are showing on client invoices yet not in [Client Profile | Info | Bonus Points](#). Why? The system's End of month must be within 2 months of the current date. This is necessary to keep stock, sales and bonus points records current. Anything further back will not process bonus points fully. Once End of Month has been performed and rolled forwards all relevant points showing on client invoices will be updated to their bonus point balances.

DOUBLE POINTS

Have special “double points” days to attract clients – with or without supplier participation. All clients that have Bonus Points will be able to be targeted as they are now in their own marketing category. You can use text messaging to inform your clients of these specials.

LUXURY PRODUCTS

Promote high margin “luxury” products for redemption to create an extra margin for your business. An extra 100 Bonus Points can seem like a lot to a client, but at minimal a cost to the business (\$1).

SLOW MOVING PRODUCTS

Promote slow moving items, products that are nearing expiry and / or end of line products using extra “bonus points” as motivation. This can result in a smaller loss to the business because the products are sold with a lower discount than would normally be applied as well as the client feeling like they are ‘gaining’ more.

MINIMAL OVERHEADS

Allow for points to be collected and redeemed for services that have minimal overheads for the clinic e.g. annual patient health checks or junior stylist services.

USING YOUR WEBSITE

Create hits for your website by asking clients to check online for the expiration status of their points. Upon noticing points may be close to expiration, the client will come into the business creating the opportunity for staff to up-sell more products and services.