



SILVERWAREPOS

HOW TO CREATE AND ASSIGN A LOYALTY CLIENT

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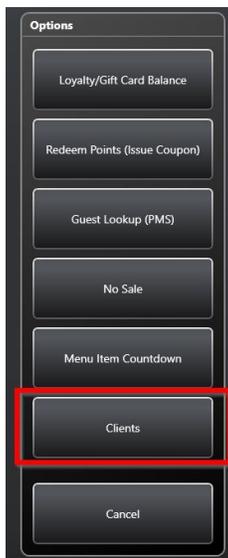
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STEP 1: HOW TO CREATE THE CLIENT

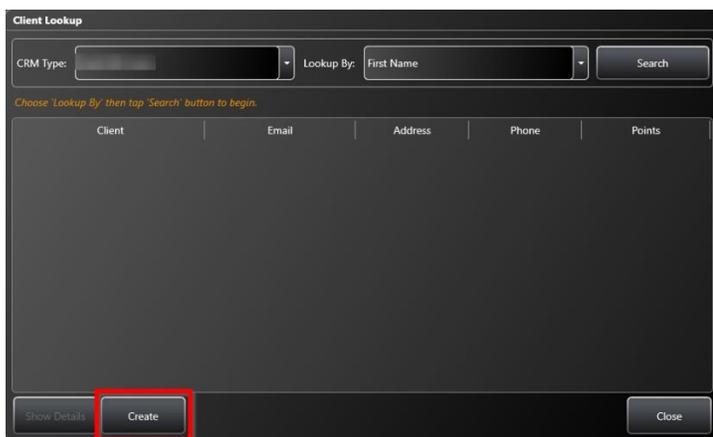
1. From the main floorplan screen, choose Other Options.



2. Choose Clients



3. Choose Create



4. Fill in the Client information.

The screenshot shows the 'Create Client (Local Gift Cards)' form. At the top, there are checkboxes for 'Gift Card', 'Frequent Diner', 'VIP', and 'On-Screen Keyboard' (which is checked). The 'Company' field is filled with 'Test Company'. The 'First Name' field is 'test First name' and the 'Last Name' field is 'Test Last Name'. The 'Display As' field contains '<CompanyName>'. The 'Gender' section has radio buttons for 'Not Specified', 'Male', and 'Female', with 'Male' selected. There are input fields for 'Language', 'Birthday', and 'Anniversary'. Below these are three text areas for 'Internal Notes', 'Receipt Notes', and 'Kitchen Notes'. On the left side, there are input fields for 'Credit Limit' (\$0.00), 'Money Balance' (\$0.00), 'Point Balance' (0), 'Discount' (None), 'Price Level' (None), 'Discount Group Code', and 'Interface ID'. On the right side, there are tabs for 'Primary Address' and 'Shipping Address'. The 'Primary Address' tab is active, showing fields for 'Address 1', 'Address 2', 'City', 'Telephone', 'State/Province', 'Mobile', 'ZIP Code', 'Fax', 'Country', and 'Email'. At the bottom, there are buttons for 'Manage Meal Plans', 'Manage Cards', 'Fields & Prefs', 'Save', and 'Cancel'.

5. Ensure "Frequent Diner" is enabled. This is what enables the client to accumulate loyalty points.

This screenshot is identical to the previous one, but the 'Frequent Diner' checkbox is now checked and highlighted with a red box. The 'Display As' field has been updated to '<LastName>, <FirstName> (<CompanyName>)', and the 'Gender' radio button for 'Male' is now selected.

6. The client is now created to accumulate points. To save your changes, choose Save. If you wish to add a loyalty Card to the client, please refer to **STEP 2: ASSIGNING A LOYATLY CARD**

STEP 2: ASSIGNING A LOYALTY CARD

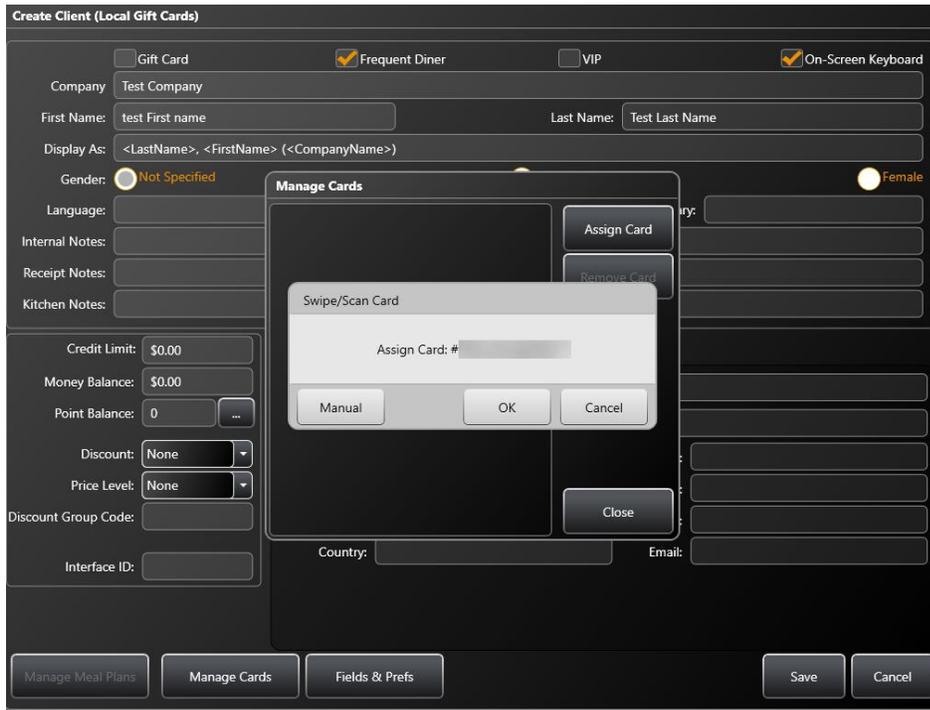
1. From the client window screen, choose Manage Cards.

The screenshot shows the 'Create Client (Local Gift Cards)' form. At the top, there are checkboxes for 'Gift Card', 'Frequent Diner' (checked), 'VIP', and 'On-Screen Keyboard' (checked). Below these are fields for 'Company' (Test Company), 'First Name' (test First name), and 'Last Name' (Test Last Name). The 'Display As' field contains the template '<LastName>, <FirstName> (<CompanyName>)'. The 'Gender' section has radio buttons for 'Not Specified', 'Male', and 'Female'. There are also fields for 'Language', 'Birthday', and 'Anniversary'. Below these are 'Internal Notes', 'Receipt Notes', and 'Kitchen Notes' text areas. On the left side, there are input fields for 'Credit Limit', 'Money Balance', 'Point Balance', 'Discount', 'Price Level', 'Discount Group Code', and 'Interface ID'. On the right side, there are tabs for 'Primary Address' and 'Shipping Address', followed by fields for 'Address 1', 'Address 2', 'City', 'State/Province', 'ZIP Code', 'Country', 'Telephone', 'Mobile', 'Fax', and 'Email'. At the bottom, there are buttons for 'Manage Meal Plans', 'Manage Cards' (highlighted with a red box), 'Fields & Prefs', 'Save', and 'Cancel'.

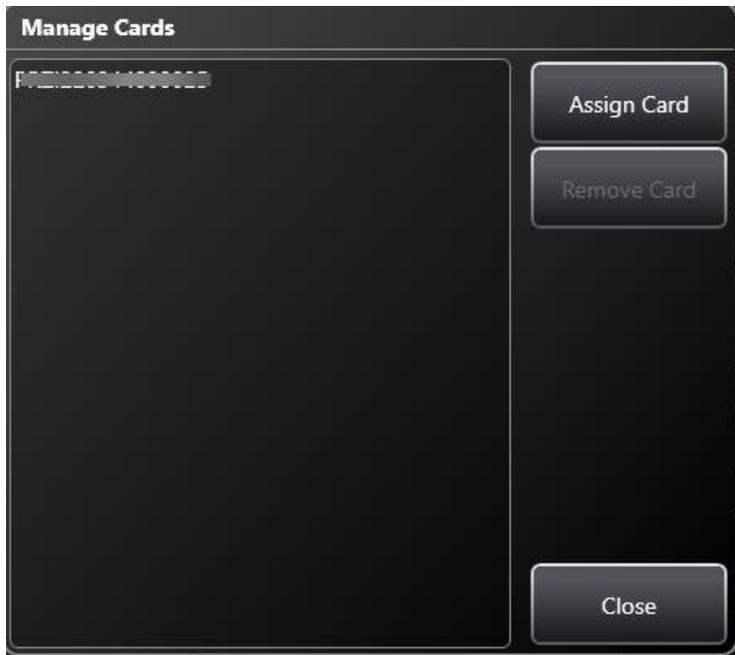
2. Choose Assign Card.

This screenshot shows the same 'Create Client (Local Gift Cards)' form as above, but with a 'Manage Cards' modal window open in the center. The modal has a title bar 'Manage Cards' and contains two buttons: 'Assign Card' (highlighted with a red box) and 'Remove Card'. At the bottom of the modal is a 'Close' button. The background form is dimmed but still visible, showing the same fields and buttons as in the previous screenshot.

3. Swipe the loyalty card now. Press OK.



4. The card will now be assigned to this client. Press Close.



5. The client is now associated to the loyalty card. Press Save. If you wish to assign an automatic Discount to the client, please refer to **STEP 3: Assigning a Discount to a Client**.

STEP 3: Assigning a Discount to a Client

The following steps enable an automatic Discount to apply to an order when the client is assigned, or the loyalty card is swiped in an order.

1. Choose the Discount drop down.

The screenshot shows the 'Create Client (Local Gift Cards)' interface. It includes fields for Company, First Name, Last Name, Display As, Gender (Not Specified, Male, Female), Language, Birthday, Anniversary, Internal Notes, Receipt Notes, and Kitchen Notes. There are also checkboxes for Gift Card, Frequent Diner, VIP, and On-Screen Keyboard. Financial fields include Credit Limit, Money Balance, and Point Balance. The 'Discount' dropdown is highlighted with a red box and shows 'None'. Other dropdowns include Price Level and Discount Group Code. Address fields are split into Primary and Shipping. Buttons at the bottom include Manage Meal Plans, Manage Cards, Fields & Prefs, Save, and Cancel.

2. Choose the discount you wish to assign to the client. You can create these discounts from **Manager Options > Configuration Tab > Discount Reasons**.

The screenshot shows the 'Modify Client (Local Gift Cards)' interface. The 'Discount' dropdown menu is open, displaying a list of options: None, BEVERAGE RECOVERY, EMPLOYEE DISCOUNT, F&B COMP, HOSPITALITY, MANAGER MEAL, OWNER COMP, SERVICE RECOVERY, Staff, test, and VIP. The 'None' option is highlighted in red. The rest of the form is identical to the previous screenshot.

3. Save your changes.

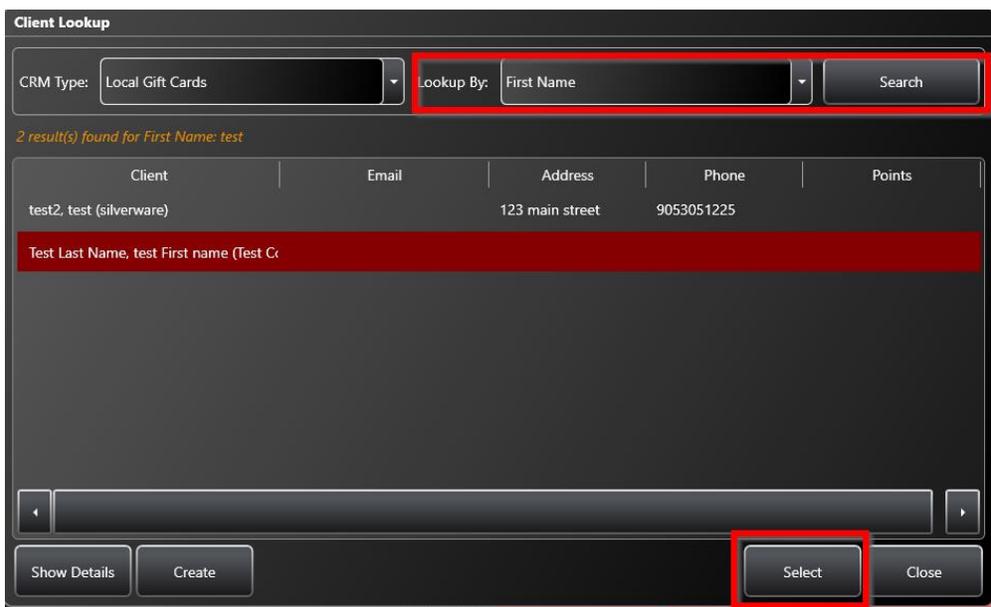
INDEX A: HOW TO ASSIGN A CLIENT TO AN ORDER

METHOD 1: Without a Loyalty Card

1. From the Order Screen, choose Assign Client.



2. Search for the client and then press Select.



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3. The client is now assigned.



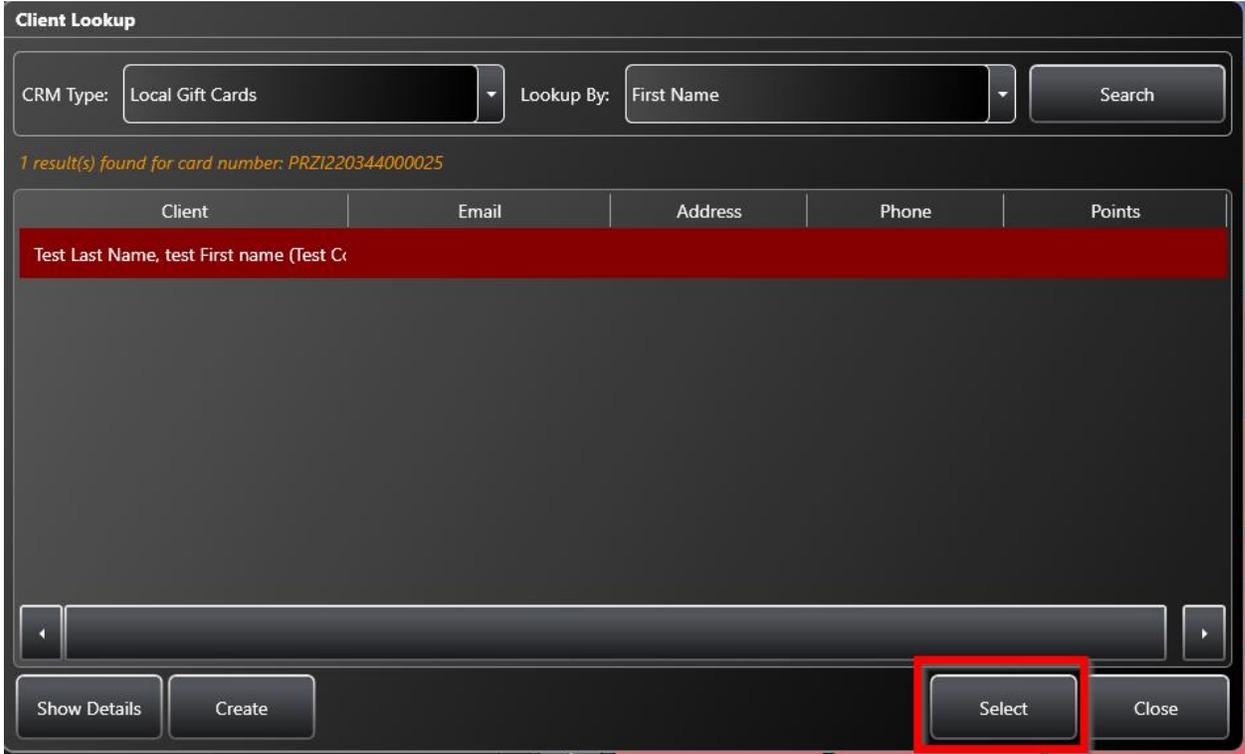
METHOD 2: With a Loyalty Card

1. From the Order Screen, choose Assign Client.



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- From the assign client window, swipe the Loyalty Card. The client assigned to the card should now be listed. Choose Select.



- The client is now assigned.

