# **Rewards Notifications**

## **Overview**

Added as an expansion to the already existing **Automated Notifications** feature, you can now create templates and rules for text and email **Reward Notifications** to have **Rewards Activation** and **Rewards Balances** automatically sent out when the conditions of the rules are met. The **Rewards Notification** feature comes with two brand-new Notification Types: **New Card** and **Balance Update**.

These new **Notification Types** give you the opportunity to provide customers with **instant confirmation** of their **Rewards program activation** from POS directly to their preferred contact method, as well as receive **Rewards balance reminders** showing how much they have earned by shopping at your store.



Please visit the <u>Automated Notifications</u> section of the EdgeUser knowledgebase for how-to documentation and tutorial videos covering other available **Notification types**.

### Requirements

**Prior** to using the **Rewards Notification** feature, you must first make sure you have the **Rewards program activated** in your Edge.

To activate your Rewards program:

- 1. Navigate to Administrative > System Options > Tender/Rewards Card Options.
- 2. Scroll down to the Tender/Rewards Card Options section.
- 3. Locate the option labeled Enable Rewards/Referral Cards and set to True.



Please visit the <u>Rewards/Referral Setup</u> section of the EdgeUser knowledgebase for more available Rewards System Options, as well as step-by-step instructions for setting up Rewards tiers, best practices, redeeming Rewards, and more.

## Working with Rewards Notifications

#### **Creating Templates**

While the Edge comes with **Default Rewards Templates** you may use for your **Rewards Notifications**, you must still create and manually save your template for use with this feature.

**This step is required**, as Edge **will not** automatically send any default template as your notification without you first creating one.

Editing Ter	nplate		
Name*	Rewards Balance		Сору
Type*	Rewards Balance Updated (Customer)		FIOII
Body*	{[Store.Name]}: Your rewards balance is {(Rewards.Balance)}. To opt out, reply STOP	Associate Name Customer FirstName LastName Title Rewards ExpirationDate CardNumber RedeemByDate IssuedDate Tier EarnedTotal RedeemedTotal Balance OriginalAmount Store Name	Arex D
Prev	iew Load Default Values	Save & Close	Cancel

To create a **Notification Template**:

- 1. Click Administrative > Notifications > Manage Notification Templates.
- 2. Click the Add New Email or Add New SMS button at the bottom.
- 3. Select your Notification Type from the Type menu and enter a Name.
- 4. Click **Load Default Values** to load the default template or use available **merge fields** to create a custom template.
- Create and save your template. For assistance on customizing your template, see our <u>Notification</u> <u>Templates</u> documentation.

#### **Creating Triggered Actions**

After creating and saving your templates, the next step is to create the Triggered Action.

To create a Rewards Notification action:

- Click Administrative > Automation Rules> Automation Rules. The Automation Task Rules window will open.
- 2. Click Add Triggered Action at the bottom.

Automation Task Rules (11)						
Rule Name T	Rule Type 🛛 🔻	Rule Trigger 🛛 🔻	Time to Run 🛛 🔻	Is Active 🛛 🔻	Store 🔻	
Repair Waiting for Pickup - 7 Days	Notification	Automation on a Timer	2:00 PM	Yes	All	
Repair Waiting for Pickup - 14 Days	Notification	Automation on a Timer	2:00 PM	Yes	All	
Special Order Pickup	Notification	Automation on a Timer	5:00 PM	Yes	All	
Birthday	Notification	Automation on a Timer	1:00 PM	Yes	All	
Appraisal Update Reminder	Notification	Automation on a Timer	11:00 AM	Yes	All	
Pearl Restringing Reminder	Notification	Automation on a Timer	12:00 PM	Yes	All	
Repair Sizing Check	Notification	Automation on a Timer	11:00 AM	Yes	Store #1	
Repair 1 Week Checkup	Notification	Automation on a Timer	11:00 AM	Yes	Store #1	
Thank You	Opportunity Notification	Automation on a Timer	2:00 PM	Yes	Store #1	
Customer Thank You SMS	Sales Notification	Automation on a Timer	10:00 AM	Yes	HQ	0 1
Opportunity - Stale Primary Associate	Opportunity Notification	Automation on a Timer	1:00 PM	Yes	All	<mark>ا</mark>
Add Trigger Rule Rule Add	Triggered Edit Edit Action	Rule Show Deleted				Print/Export Close

3. Enter a Name, then click Next. In this example, we will create a Triggered Action for Rewards Balances.

55			
Triggered /	Action Wizard		
	Add a new Automation Rule		e ×
Name*	Rewards Balance		ar m
Store*	All Stores		•
		Next >	Cancel

4. Choose Rewards Card Notification, then click Next.

friggered Action G	enerator						
Triggeree	d Acti	ion Wiz	zard				
		Choose v	what type o	f Action yo	u would like to	set up.	
		Rewa	ards Card N	otification			

5. At the top, select **Rewards Card Balance Update** under the **Triggers** dropdown menu.

6. The **Select Customer(s**) dropdown menu will open the **Find Customer** window. Enter any desired criteria and click **OK**.

Triggered Action Generator	
Triggered Action Wizar	d 🗹
Choose what type of t	igger will set off this action.
Triggers	Rewards Card Balance Update
Select Customer(s) to a	apply to this trigger.
	test X -
	Template Options
Email Template	Rewards Balance Email
SMS Template	· · · · ·
	Templates must first be added through the notifications menu. Go to Administrative -> Notifications -> Manage Notification Templates
	< Back Next > Cancel

- 7. Select an Email or SMS Template. You can specify both if you like.
- 8. Click Next then Finish.



Repeat these steps but instead **select New Rewards Balance** from the **Triggers** dropdown menu to create the **Triggered Action** for **Rewards Card Activation** notifications.

#### **Editing Rules**

To edit an existing rule:

- 1. Click Administrative > Automation Rules > Automation Rules.
- 2. Use the Edit Rule button or double click the rule you wish to open.
- 3. Use the **Next** button to step through the wizard and make your desired changes.
- 4. Click **Finish** at the end to save your changes.

#### **Deleting/Undeleting Rules**

To delete an existing rule:

- 1. Click Administrative > Automation Rules > Automation Rules.
- 2. Select the rule you wish to delete.
- 3. Click the **Delete Rule** button at the bottom.

To undelete a rule you deleted:

- 1. Click Administrative > Automation Rules > Automation Rules.
- 2. Check the **Show Deleted** box at the bottom.
- 3. Deleted rules will appear in red font. Select the deleted rule you wish to undelete and use **Edit Rule** to open it.
- 4. Click the **Next** button through the wizard making any desired changes along the way.
- 5. Click **Finish** at the end to complete undeleting this rule.