



## BatchLine Loyalty Card and Gift Card Instructions

### Loyalty and Gift Card Numbers

To use BatchLine's free gift and loyalty card service, first contact us via [mail@batch.co.uk](mailto:mail@batch.co.uk) so your account can be set up.

- **A Loyalty Card must begin 205.**
- **A Gift Card must begin 206.**
- The length of both Loyalty and Gift Cards is always **13 digits.**
- The final digit is a check digit.
- The four digits after either 205 or 206 are optionally the first 4 digits of your SAN.

Numbers should just start at **2050000000001** for loyalty cards and **2060000000001** for gift cards and work their way up. The BatchLine side of the process takes into account the bookseller's account number and the card number when dealing with transactions. This means shops can issue loyalty cards and gift cards with numbers that have been used by other shops without fear that they'll conflict with each other.

**Note:** Ask the card supplier to record the numbers produced on their invoice, then you can refer to this when you need a reprint. If you have had cards before, check with your supplier before ordering to avoid duplication.

### Loyalty Card Setup

The set up can be done in:

- Back Office
- Maintenance
- Loyalty Card Config

The screenshot below is a commonly used system for awarding points when the customer does not spend a 'whole' pound.

### Allocating a Loyalty Card

- Go to Customers in the Front Office menu to select the customer account or create a new customer.
- Select Edit
- Loyalty Cards can be added using a physical card with a printed barcode or by entering a number manually.

### No Card Method

- Enter the next number from your list of Loyalty Card numbers into the Loyalty Card Field on the customer account.
- Make sure you only use a number once.
- Save the changes. BatchLine may ask you whether you want to create a new Open Bravo customer or use an existing one. Unless you know you have an existing Open Bravo customer whom you want to use, the answer will always be **'New Customer'**. (NB This only applies to former 'Bertline' users who previously set up Open Bravo customers before we introduced Loyalty Cards.)

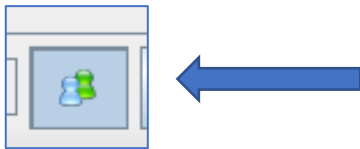
### Card Method

- Scan the card.
- Save the changes. BatchLine may ask you whether you want to create a new Open Bravo customer or use an existing one. Unless you know you have an existing Open Bravo customer whom you want to use, the answer will always be **'New Customer'**. (NB This only applies to former 'Bertline' users who previously set up Open Bravo customers before we introduced Loyalty Cards.)

## Adding a Loyalty Card to a Receipt

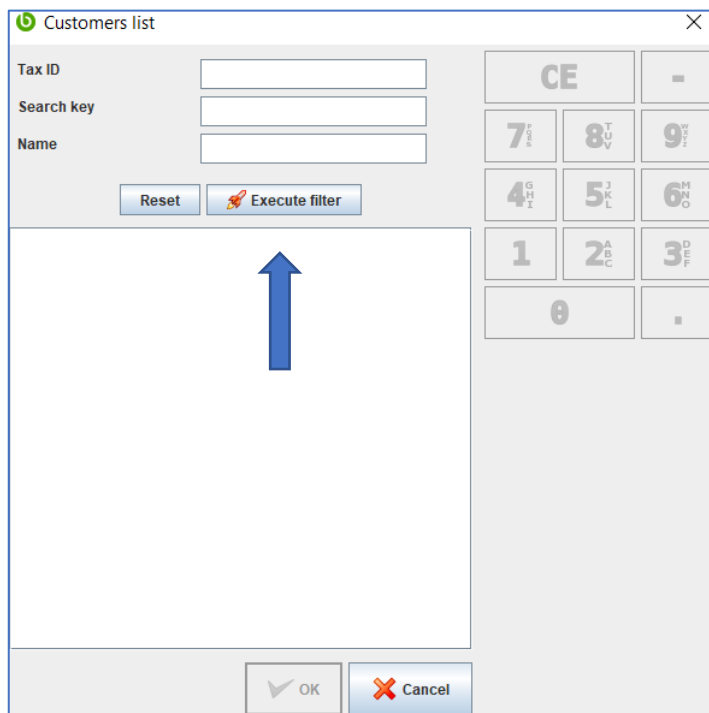
### No Card Method

When a customer comes in whom you know has a Loyalty Card number, you will need to record that number against the transaction. At what point you record the number is not critical: it can be after you have scanned items onto the receipt or before. Once the Loyalty Card Number has been recorded, the name of the relevant customer and their BatchLine account number will appear in the box next to the Customer button:



To record the Loyalty Card Number onto a receipt and therefore against the customer:

- Click on the Customer button show above.
- On the next screen click on Execute Filter.



The screenshot shows a dialog box titled "Customers list" with a close button (X) in the top right corner. On the left side, there are three input fields labeled "Tax ID", "Search key", and "Name". Below these fields are two buttons: "Reset" and "Execute filter". On the right side, there is a numeric keypad with buttons for "CE", "-", "7", "8", "9", "4", "5", "6", "1", "2", "3", "0", and ".". At the bottom of the dialog box, there are two buttons: "OK" and "Cancel". A blue arrow points upwards towards the "Execute filter" button.

- Your list of Loyalty Card customers will appear as an alphabetical list.
- Select the correct one from the list by scrolling with the mouse or using the slider on the left-hand side.
- When you click on the OK button, the form will close and the customer's name and BatchLine account number will appear in the window next to the Customer button.
- The customer will now receive any points allocated or the card can be used for payment if there are enough points on it

## Card Method

To add a physical Loyalty Card to the receipt, scan the card and the customer's name and BatchLine account number will appear in the window next to the Customer button.

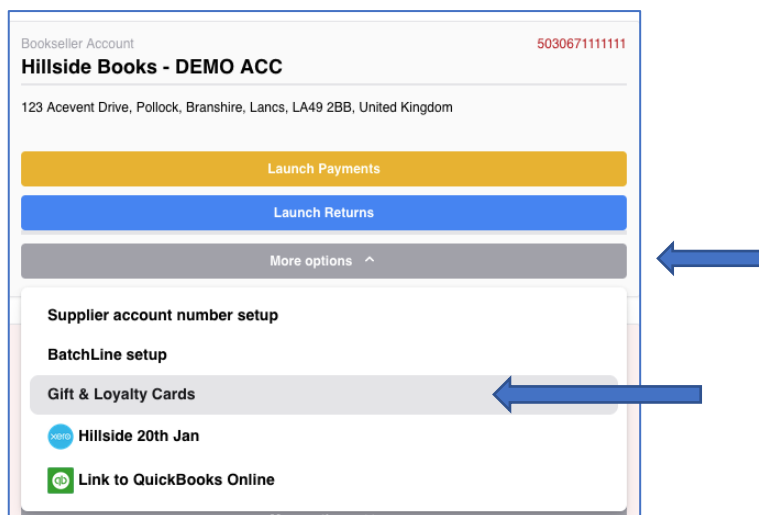
## Redeeming a Loyalty Card

Follow the instruction for adding a card to a receipt either manually or with a card as set out above. Process a sale as normal and, when the payment screen is displayed and if the card has enough points to qualify for redemption, Loyalty Card will show as a payment method. The value of the card can be redeemed either in full or as part payment, either taking some or all of the value of the card.

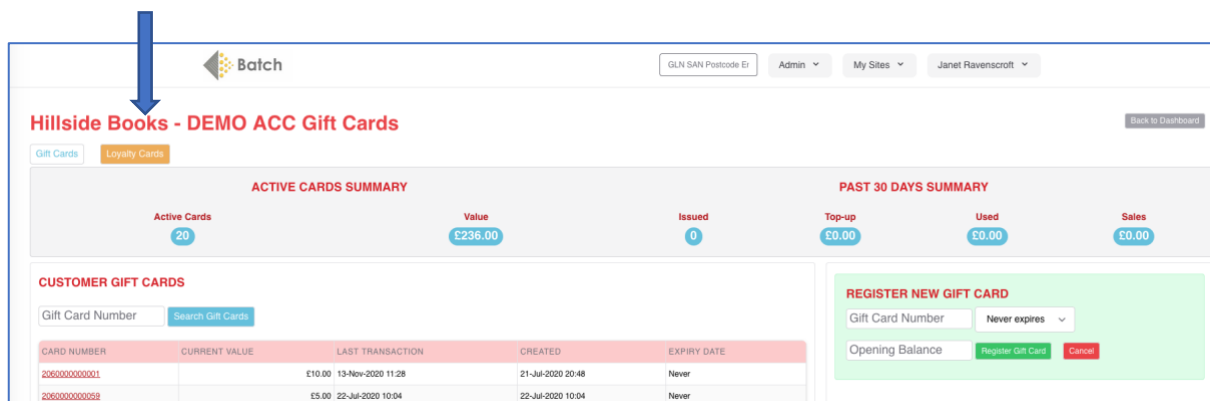
## Editing Loyalty Card Points

To edit the amount of points on a Loyalty Card, go to <https://www.batch.co.uk/batchone/> and login. (To use BatchLine's free gift and loyalty card service, you must first contact us via [mail@batch.co.uk](mailto:mail@batch.co.uk) so your account can be set up.)

1. Click on More Options to see the Gift & Loyalty Cards button.



- By default the page will open on the Gift Card page, so click on the orange Loyalty Card button to change the view.



**Loyalty Cards**

**ACTIVE CARDS SUMMARY**

Cards: 7    Points: 14,662    Issued: 0

**PAST 30 DAYS SUMMARY**

Earned: 0    Redeemed: 0    Sales: £0.00

**CUSTOMER LOYALTY CARDS**

CARD NUMBER	CURRENT POINTS	LAST TRANSACTION	CREATED
20500000000008		9,900 12-Apr-2021 14:41	17-Jul-2020 19:20
20500000000001		2,598 21-Jul-2020 20:48	28-May-2020 17:24
2051111098738	20	29-Jun-2020 08:31	29-Jun-2020 08:31

**REGISTER NEW LOYALTY CARD**

Loyalty Card Number:  Never expires

Opening Balance:

2. Click on the Loyalty Card to be edited. This will display an Adjust Balance option on the right of the screen.

**ADJUST BALANCE**

Amount:

- To adjust the balance enter any amount and click on either the '+' or '-' buttons to increase or decrease the total on the card by that amount.

### Gift Card Setup

Gift Cards are populated on <https://www.batch.co.uk/batchone/>. Click on More Options to see the Gift & Loyalty Cards button. The Gift Card page will open by default.

- Scan the card in the Register New Gift Card section. Enter the amount to be added to the card then save the changes.

**REGISTER NEW GIFT CARD**

Gift Card Number:  Never expires

Opening Balance:

### Gift Card Redemption

- Scan the card as part of the receipt – this will show the value of the Gift Card.
- From the Payments Screen in Open Bravo, select Gift Card and enter the amount to be withdrawn from the card as per any other payment type.

### Editing a Gift Card and Viewing Transactions

- Gift Cards can be edited and transactions viewed by clicking on a Gift Card. This will open a window displaying all transactions related to that card.
- Clicking on the Show button will display the details of that transaction.

**TRANSACTIONS (NEWEST FIRST)**

SHOW	DATE
Show	13-Nov-2020 11:28
Show	13-Nov-2020 10:53
Show	13-Nov-2020 10:53
Show	13-Nov-2020 10:44



- To adjust the balance on a Gift Card, enter the amount and click on either the '+' or '-' buttons to increase or decrease the total on the card by that amount.

**ADJUST BALANCE**

Amount

### REMINDER Loyalty and Gift Card Numbers

- A Loyalty Card always begins **205**.
- A Gift Card always begins **206**.
- The length of both Loyalty and Gift Cards is always 13 digits.
- The final digit is a check digit.
- The four digits after either 205 or 206 can be the first 4 digits of your SAN.

**Please note:** BatchLine cannot be involved in the supply of numbers and/or the production of the cards, which should always be checked carefully before an order is signed off with the printer. If you need further assistance, contact [mail@batch.co.uk](mailto:mail@batch.co.uk).

#### **Recommended supplier:**

<https://www.theplasticcardpeople.co.uk/>

Contact:

Tel: +44 (0) 800 622 6744

hello@theplasticcardpeople.co.uk