LoopyLoyalty

Quick Start Guide

CHEAT SHEET

1. CHOOSE A TEMPLATE

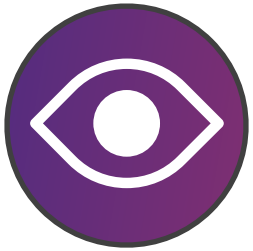
2. DESIGN YOUR CARD

3. ADD DETAILS

4. ADD LOCATIONS

5. TERMS & CONDITIONS

6. DATA COLLECTION



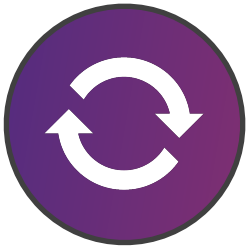
7. SAVE AND PREVIEW

8. ACTIVATE YOUR CARD

9. PROMOTE EVERYWHERE

10. STAMP. STAMP. STAMP. STAMP.

11. ENGAGE WITH MESSAGES



12. ANALYZE & IMPROVE $$$

INDEX

1. Create a new card 4
2. Design your card 5
3. Specify the details 6
4. Add your locations 7
5. Terms and conditions 8
6. Choose what data to collect 9
7. Save your card and preview design 10
8. Activate your card 11
9. Promote everywhere 12
10. Stamp cards remotely or using the app 13
11. Send messages to your customers lock screen 14
12. Analyze and improve 15

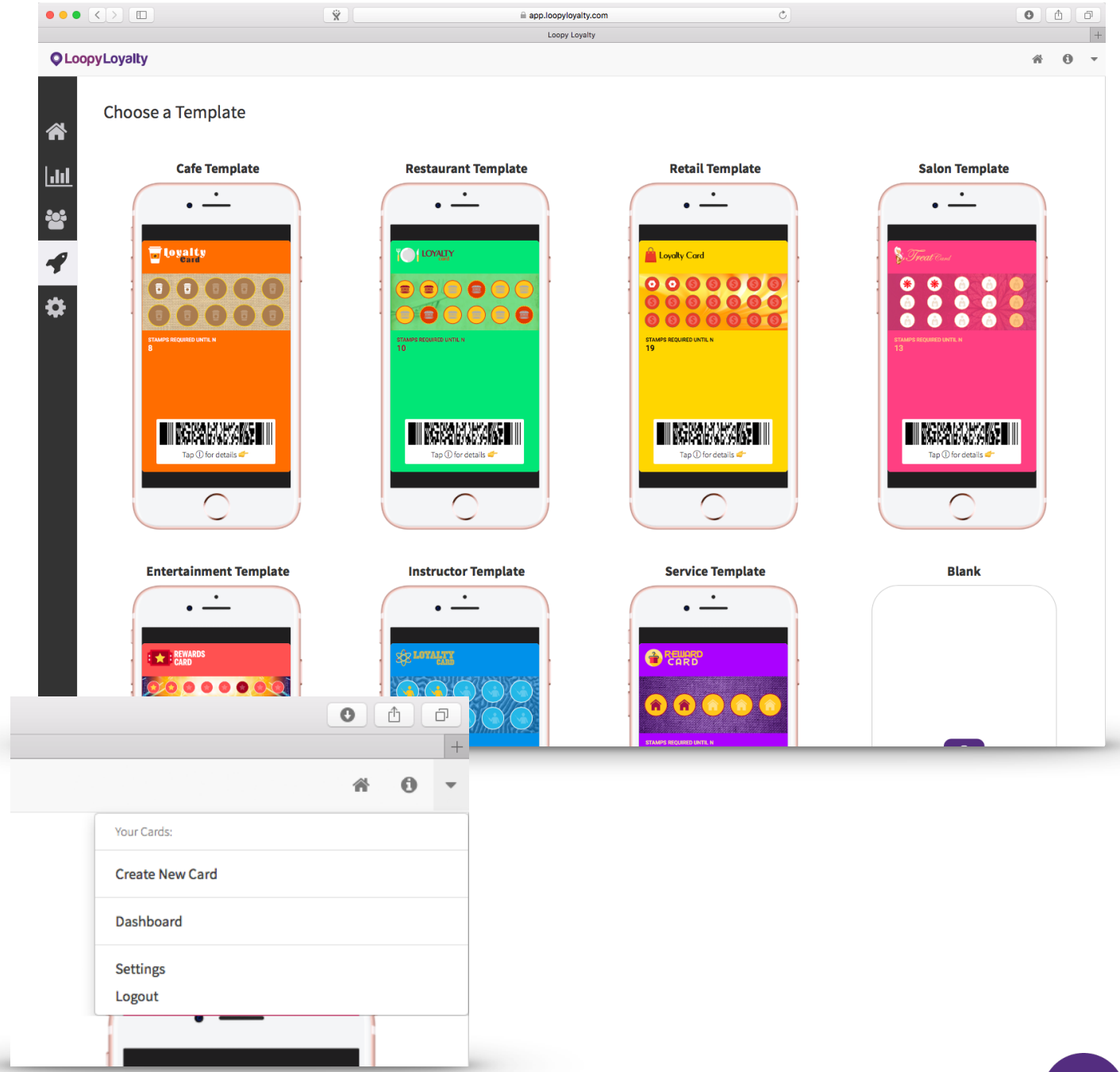
THIS GUIDE WILL TEACH YOU HOW TO BECOME A SUCCESSFUL LOOPY LOYALTY USER SO THAT YOU CAN EASILY & EFFICIENTLY DESIGN AND DISTRIBUTE BEAUTIFUL DIGITAL STAMP CARDS.

THIS IS MOBILE MARKETING AT ITS FINEST.

Get started with a free account at app.loopyloyalty.com/signup/get-started

1. CREATE A NEW CARD

Choose from one of the ready made templates or start with a blank canvas. With one click you'll be taken to the Card Design view.

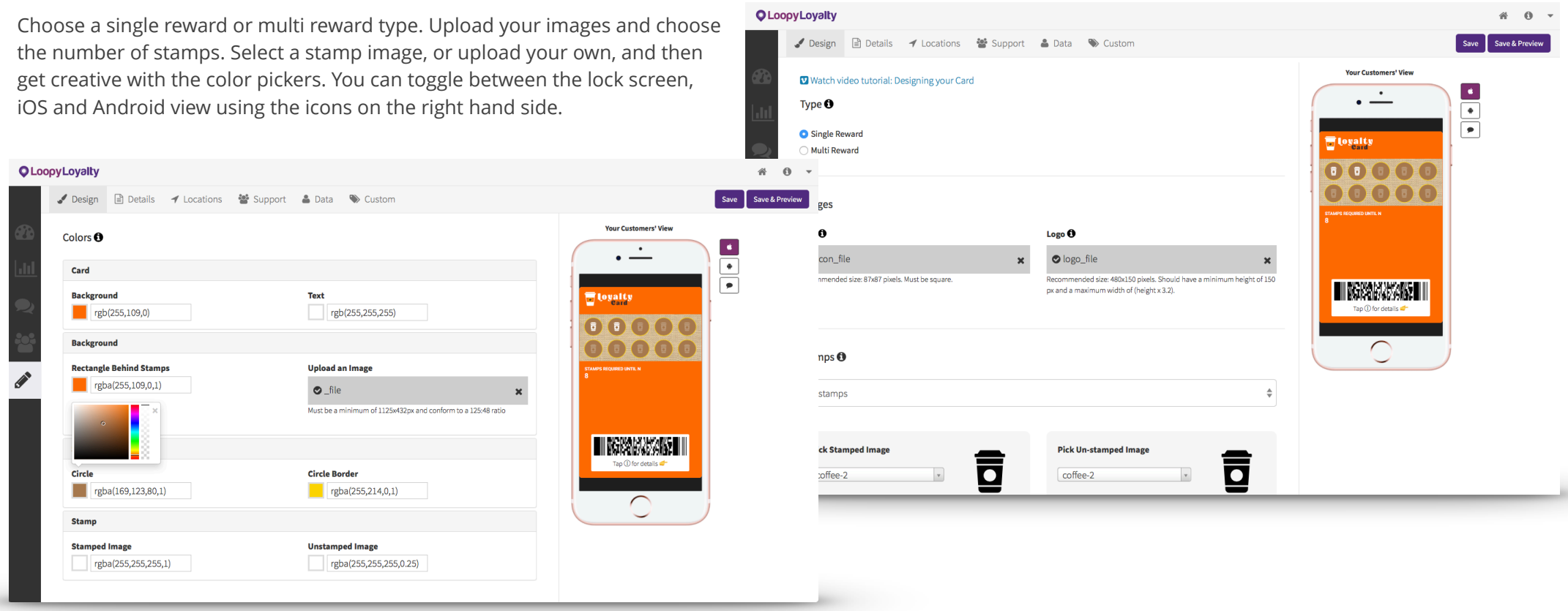


2. DESIGN YOUR CARD

Scroll down in the Design tab and follow each step. Simple. Within minutes you will create a beautiful digital card. Unleash your creativity.

Use the ready-made icon and logo in the templates or upload your own. Your icon image must be exactly square, with a recommended size of 87 pixels by 87 pixels. The recommended size for your logo image is 480 pixels wide by 150 pixels high. Logos with a transparent background work best.

Choose a single reward or multi reward type. Upload your images and choose the number of stamps. Select a stamp image, or upload your own, and then get creative with the color pickers. You can toggle between the lock screen, iOS and Android view using the icons on the right hand side.



3. ADD DETAILS

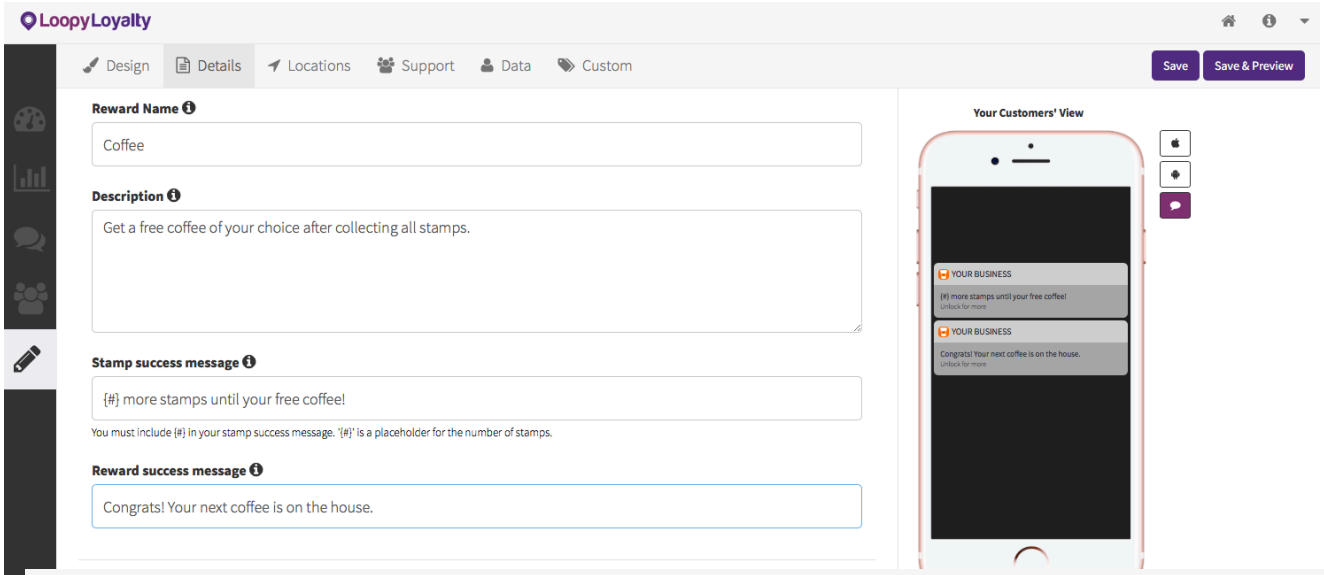
Specify the details of your loyalty card by filling in every field. The phone image will update to show you how they will appear on your customers' phone. Click on the ℹ button for some inspiration.

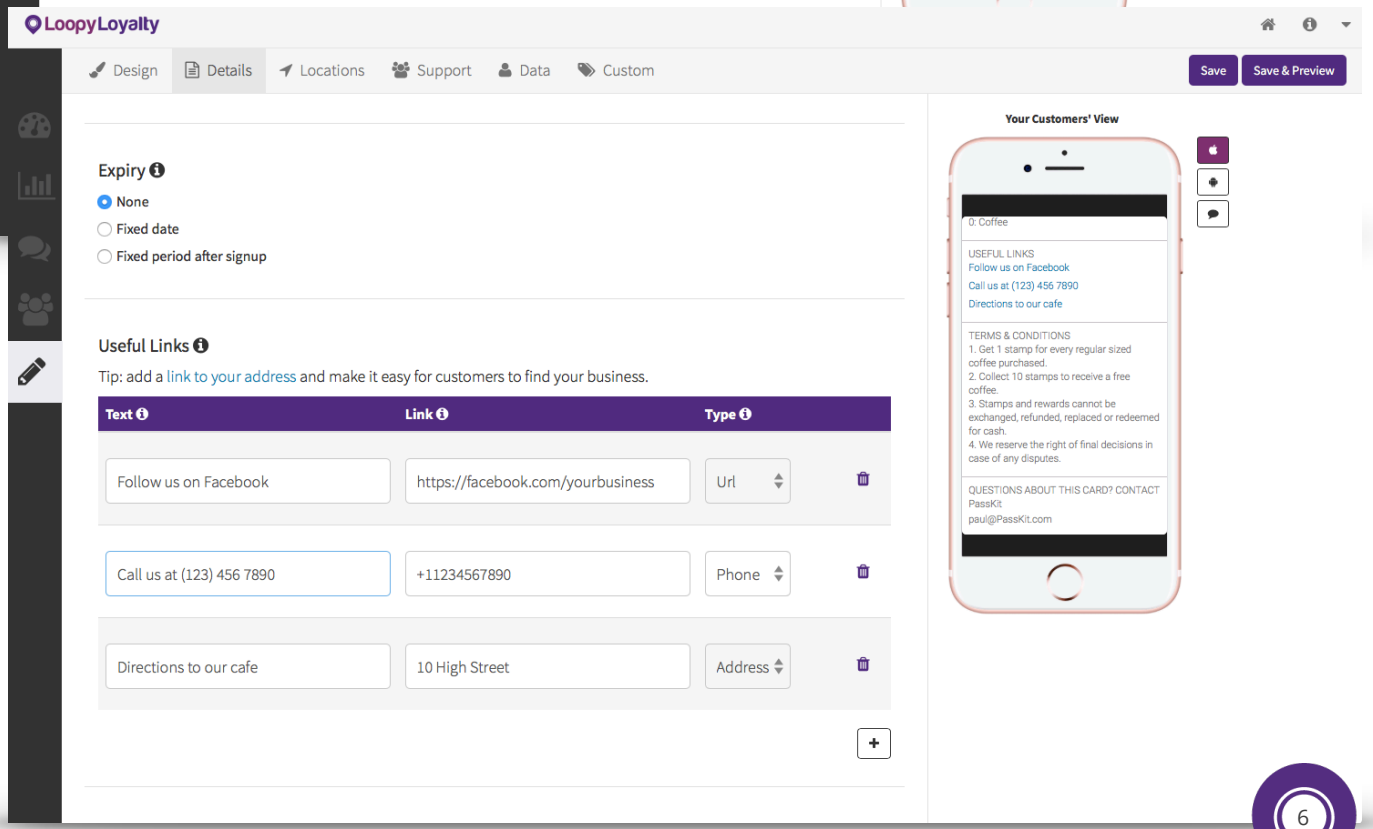
The success messages will appear on your customer's lock screen immediately after each stamp and earning a reward.

MAKE SURE YOU USE {#} IN THE STAMP SUCCESS MESSAGE

If you want your digital loyalty cards to expire, select the appropriate option and choose the date or period after sign up.

Add other links you want to appear on your card. Like your website, social media pages, telephone number, address and email. Just make sure you choose the appropriate link type. For example, if it's a website choose 'URL', if it's a phone number then choose 'Phone', if it's an email address then choose 'Email'.



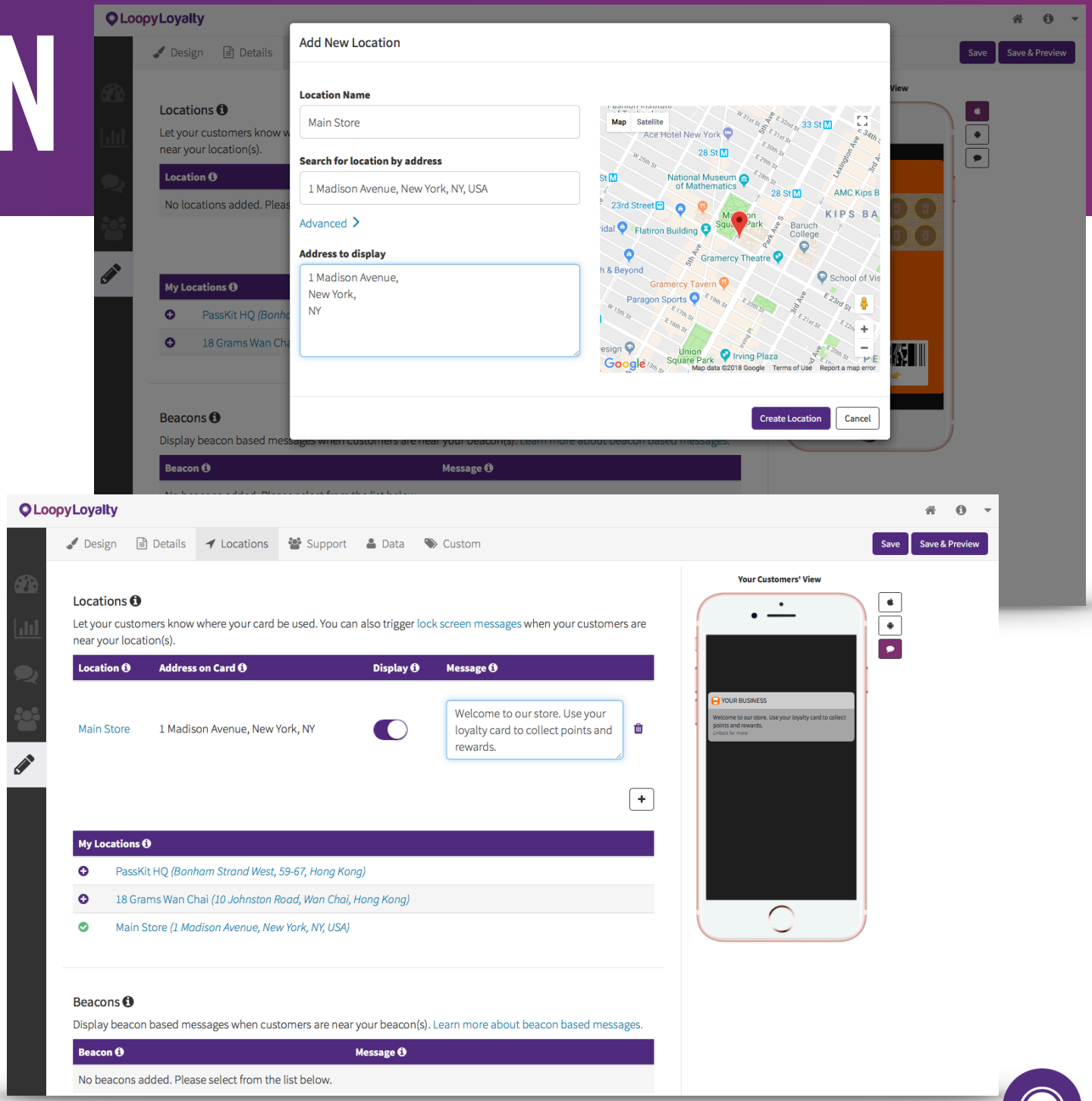


4. LOCATION

Add a location to your card design, and type in what you want to appear on your customers lock screen when they are close by.

LOCATION. LOCATION. LOCATION.

If you don't want the message to appear on your customers lock screen, simply toggle the display off.



5. T&Cs

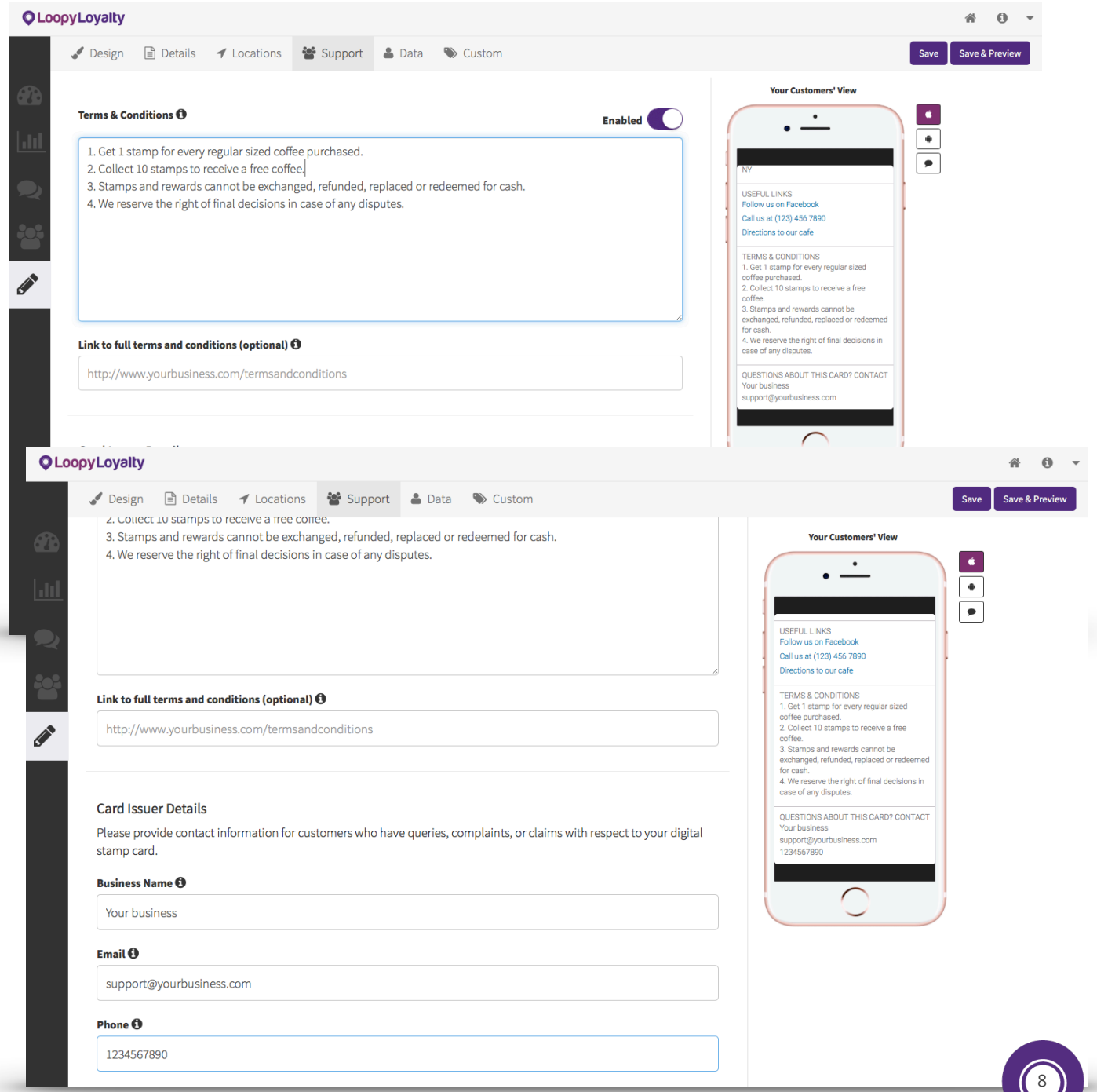
Terms and Conditions are pre-populated with sample text to get you started.

Simply type over the text you want to change. Or delete all the text and enter the terms and conditions you want your customers to see.

To disable the display of terms and conditions on your customers card, simply disable using the toggle.

If you want to link to terms and conditions on your website enter the URL (optional).

Finally enter your business information, so that your customers know who to get in touch with should they have any questions.



6. DATA

Determine what data you want to collect from customers when they register for your loyalty program.

These fields will automatically appear on the registration page and all the information you collect will be stored in your 'Customers' page as soon as people sign up.

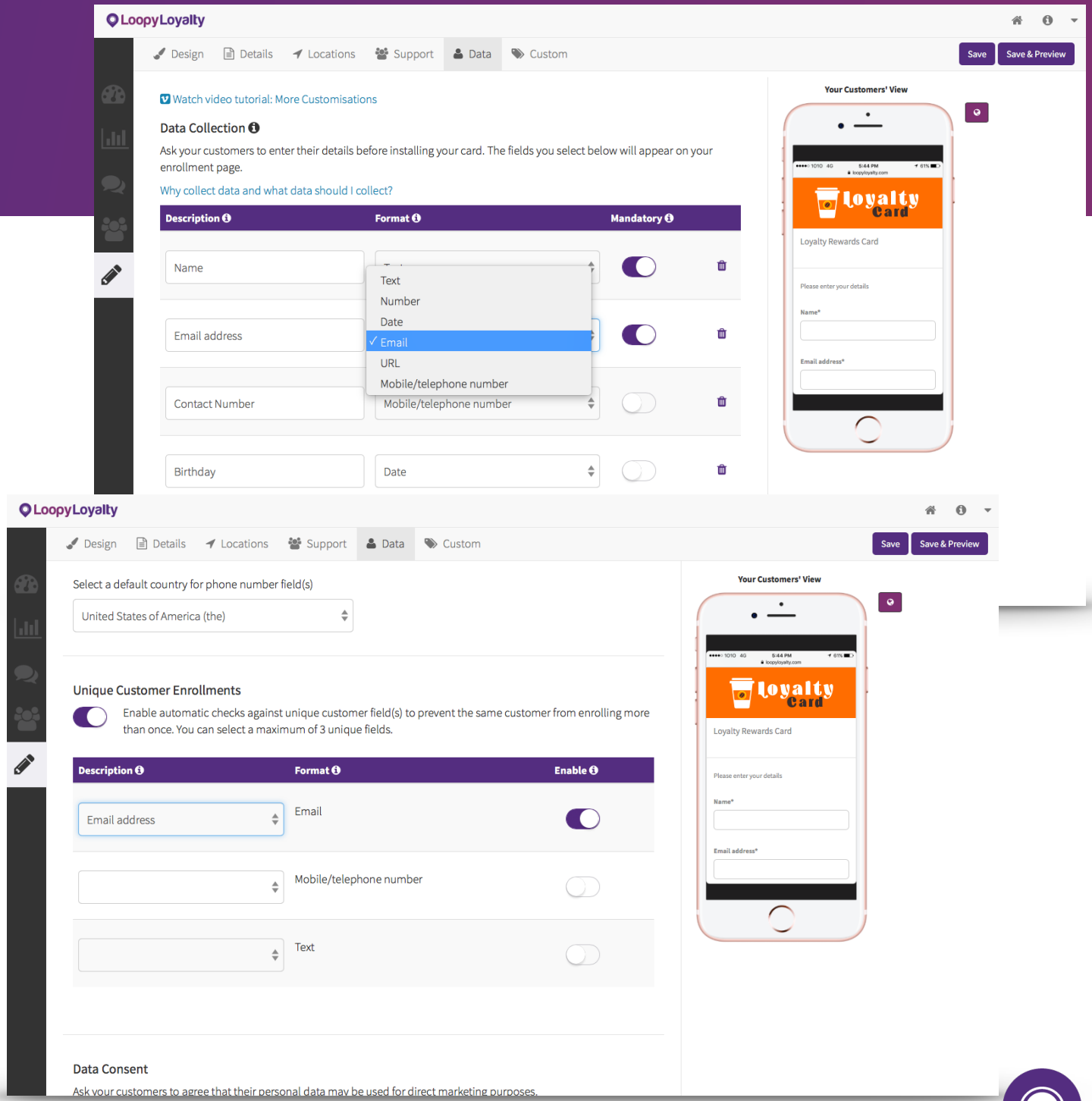
Make sure to select the format (e.g. text, email, telephone number, date) and choose whether the information is mandatory or optional. If mandatory, a customer must enter this information to get your card - so think carefully if it is really required.

If you are asking for a phone number choose the default country code.

KNOW YOUR CUSTOMER

Enable unique customer enrolments if you want to automatically check that someone has not already signed up. You can choose up to 3 unique fields.

You may also ask your customers if they agree that their personal data can be used for your marketing purposes. Simply change the text to reflect your privacy policy and enable the Data Consent feature.



7. SAVE & PREVIEW

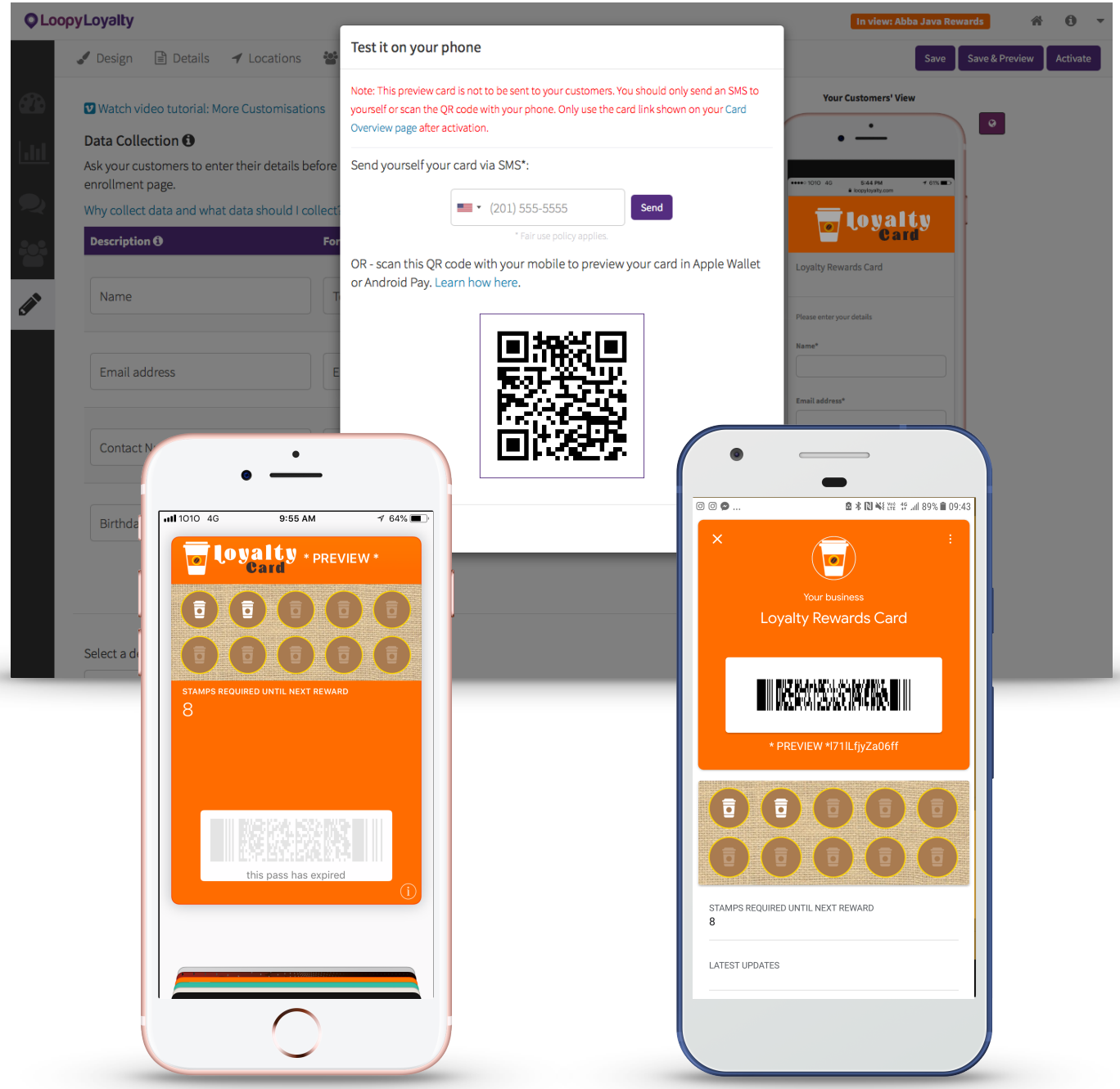
Click save and name your card design. This name won't be visible by your customers so you can call it whatever you want.

Now preview the card design on the phone. Either send yourself an SMS or scan the QR code in the preview pop-up window. You'll see what your stamp card looks like with a couple of stamps.

If you are not happy with the way the card looks in the smartphone, simply go back to the design application and make the changes. You can preview the card as many times as you like before activation.

NOT FOR YOUR CUSTOMERS (YET)

Note: this preview card is not to be sent to your customers. You should only send an SMS to yourself or scan the QR code with your phone. After you activate your card you will be presented another QR code and card link.



8. ACTIVATE

Once you are happy with your card design, it's time to Activate.

Don't be scared by the warning message. After activation, you can still change much of the card design; for example colour, logos, stamp image, reward text, locations, terms and conditions, data collection fields etc..

The following cannot be changed:

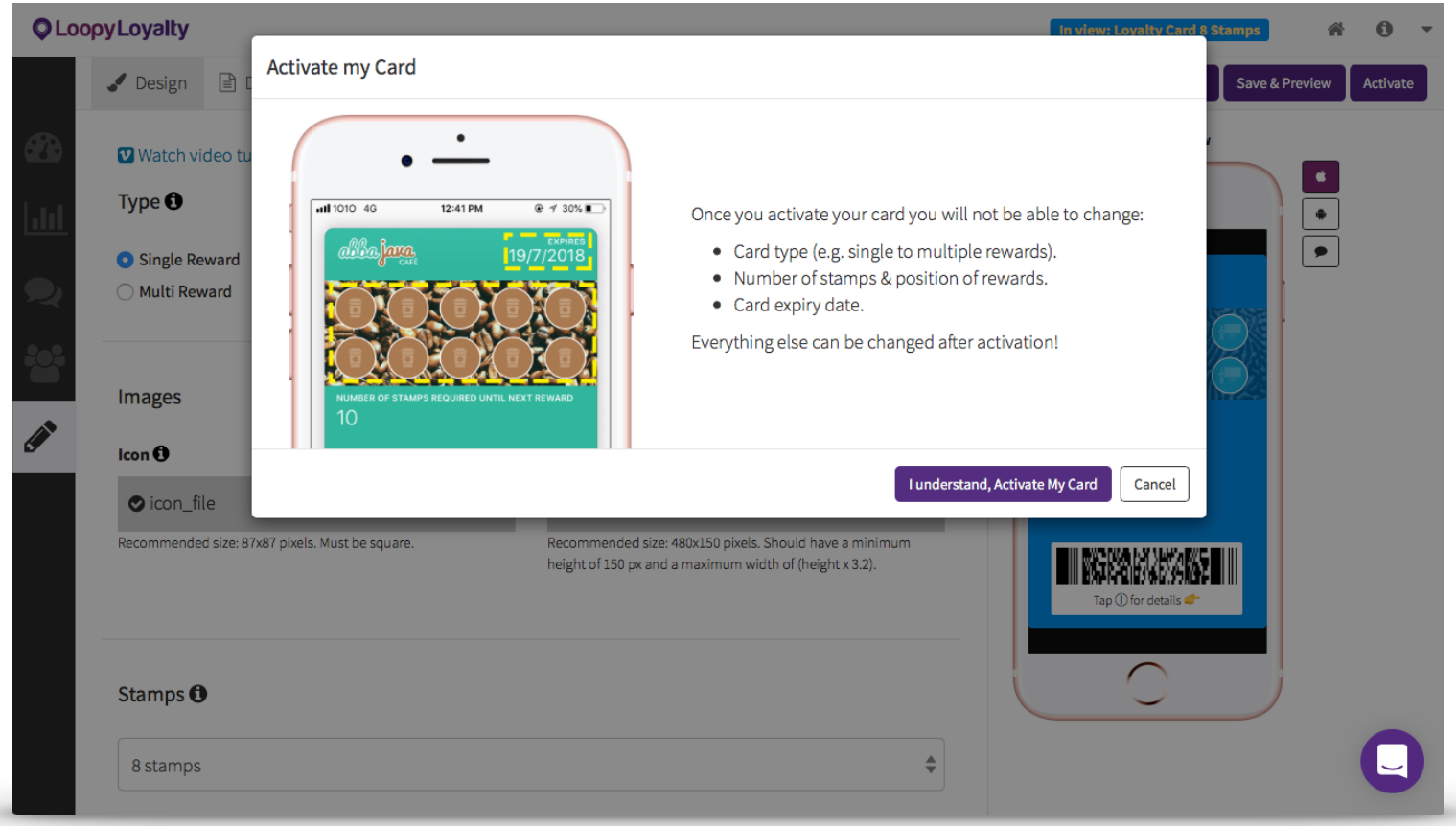
Type of Card
i.e. you cannot change from a single reward to a multi reward.

Number of stamps
e.g. you can't change then number of stamps from 8 to 10.

Position of rewards
e.g. if you selected a multi reward card, you can not change the position of a reward from stamp 3 to stamp 4.

Expiry details
i.e. you are not able to change the reward expiry date.

Unique enrolment fields (if any)
You will not be able to add any new fields to be used for unique enrolments. You can disable this, but you will not be able to reenable it.



9. PROMOTE EVERYWHERE

Once activated you are presented with a unique link (Your Card URL). Share this link to your prospects and customers so they can easily get your digital stamp card saved to their Apple Wallet or Google Pay application. Quickly give it a try for yourself to see how it works.

Promote online

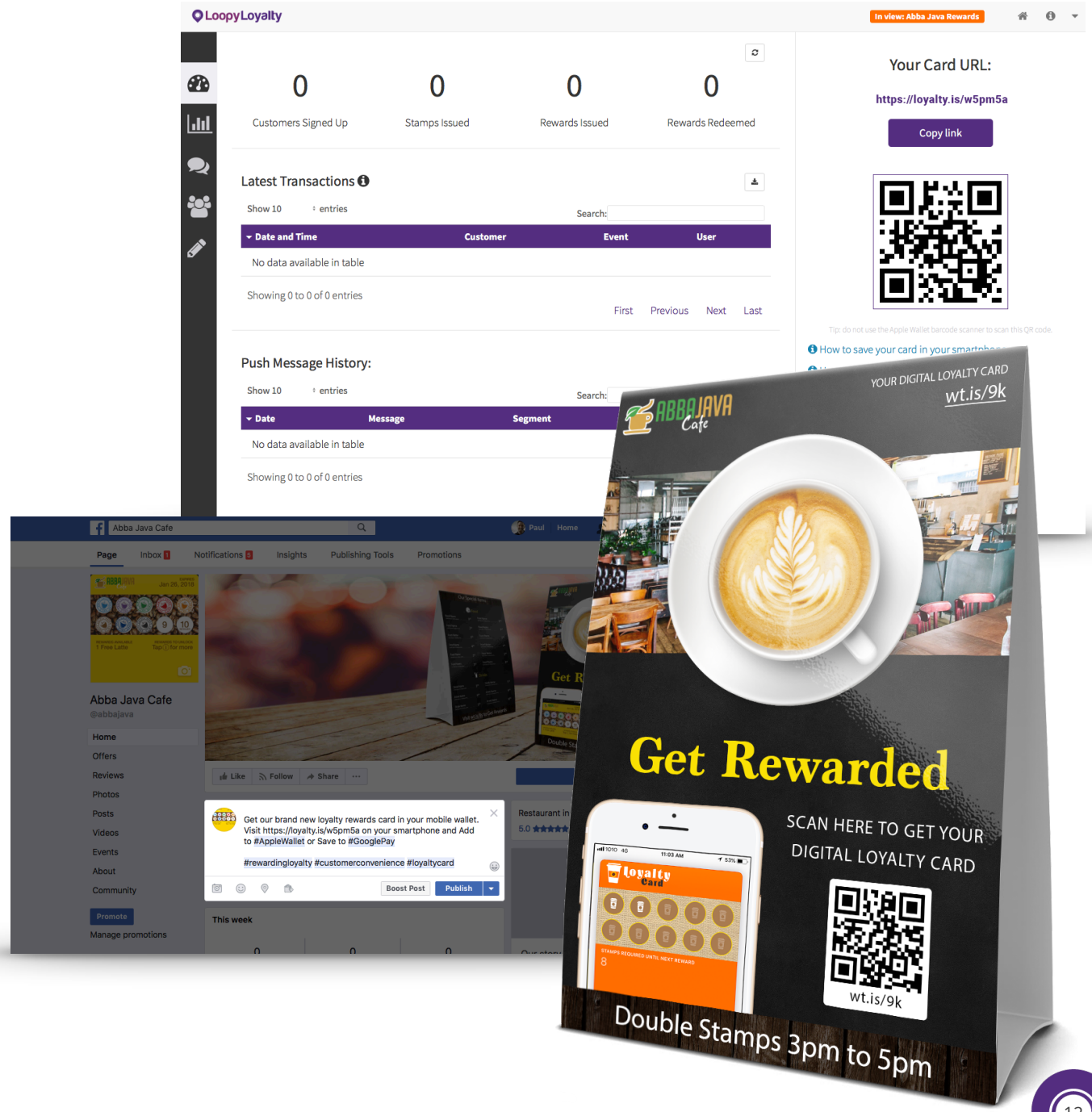
Copy Your Card URL and share it on on your social media channels, and your websites. If you already have your customer's email address send it to them using your preferred email software.

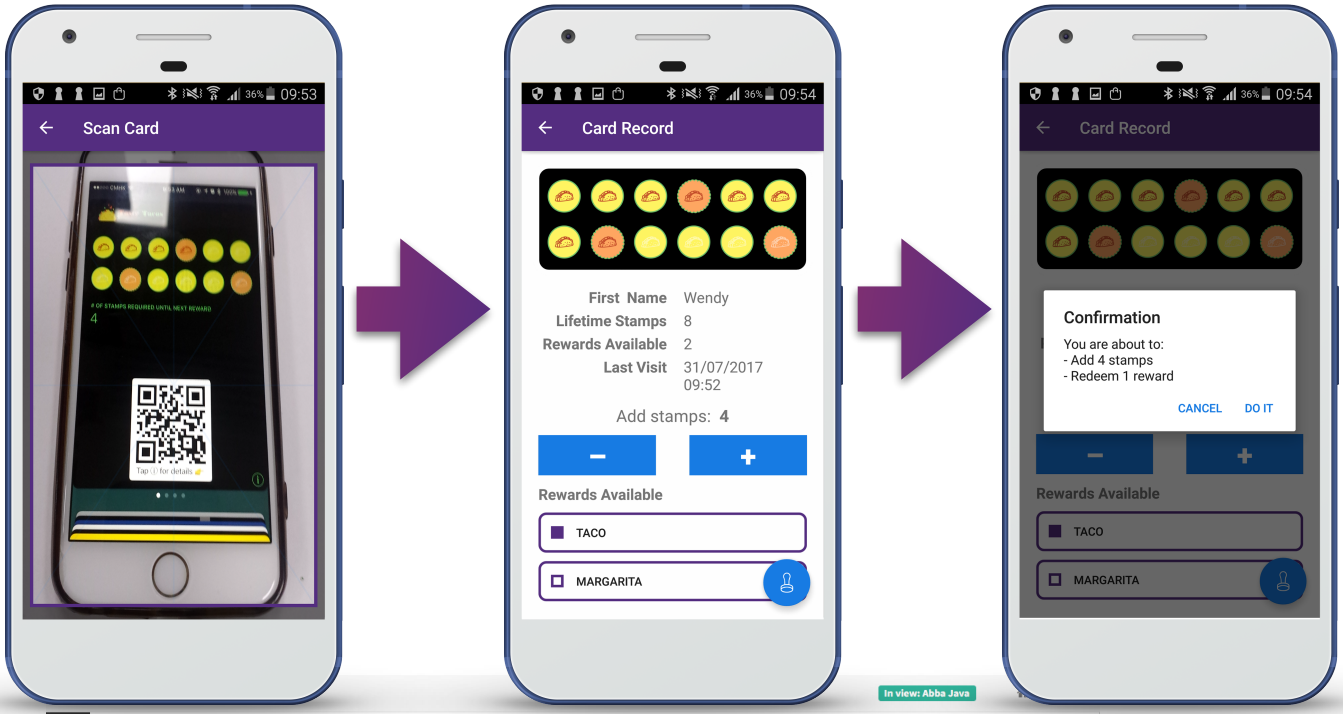
Promote offline

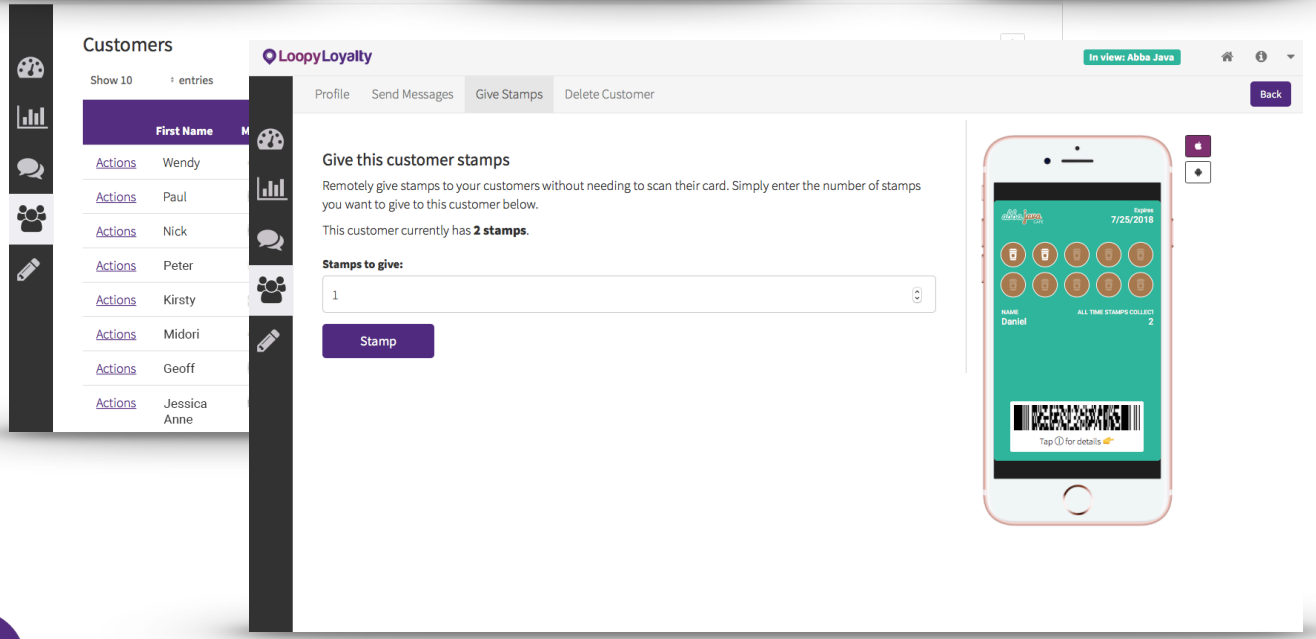
Simply download the QR code and use it in any printed material. This is ideal for in-store tent cards and posters. Your customers will then be able to scan the QR code with their smartphone and be taken directly to Your Card URL in their browser.

URL Shortening

If you want to shorten Your Card URL you can use services like bit.ly or goo.gl.







10. SCAN TO STAMP

When your customer presents their digital stamp card, simply scan using the Stamper App. Select the number of stamps and/or rewards to give, tap the stamp icon in the Android app, or Submit in the iOS app, and then confirm.

Your customer's digital stamp card will be updated automatically within seconds. And, they will be informed of how many stamps they need to collect until their next reward.

The customer record will be updated and can be seen in the transaction history in the customer view.

OR STAMP WITHOUT THE APP

If you want to stamp the card without using the app, simply navigate to the customer record and choose the 'Give Stamps' tab. Enter the number of stamps you want to give and click stamp. This is particularly useful if you want to award stamps to customers when they are not physically present in your store or have forgotten their phone.

11. SEND MESSAGES TO YOUR CUSTOMERS LOCK SCREEN

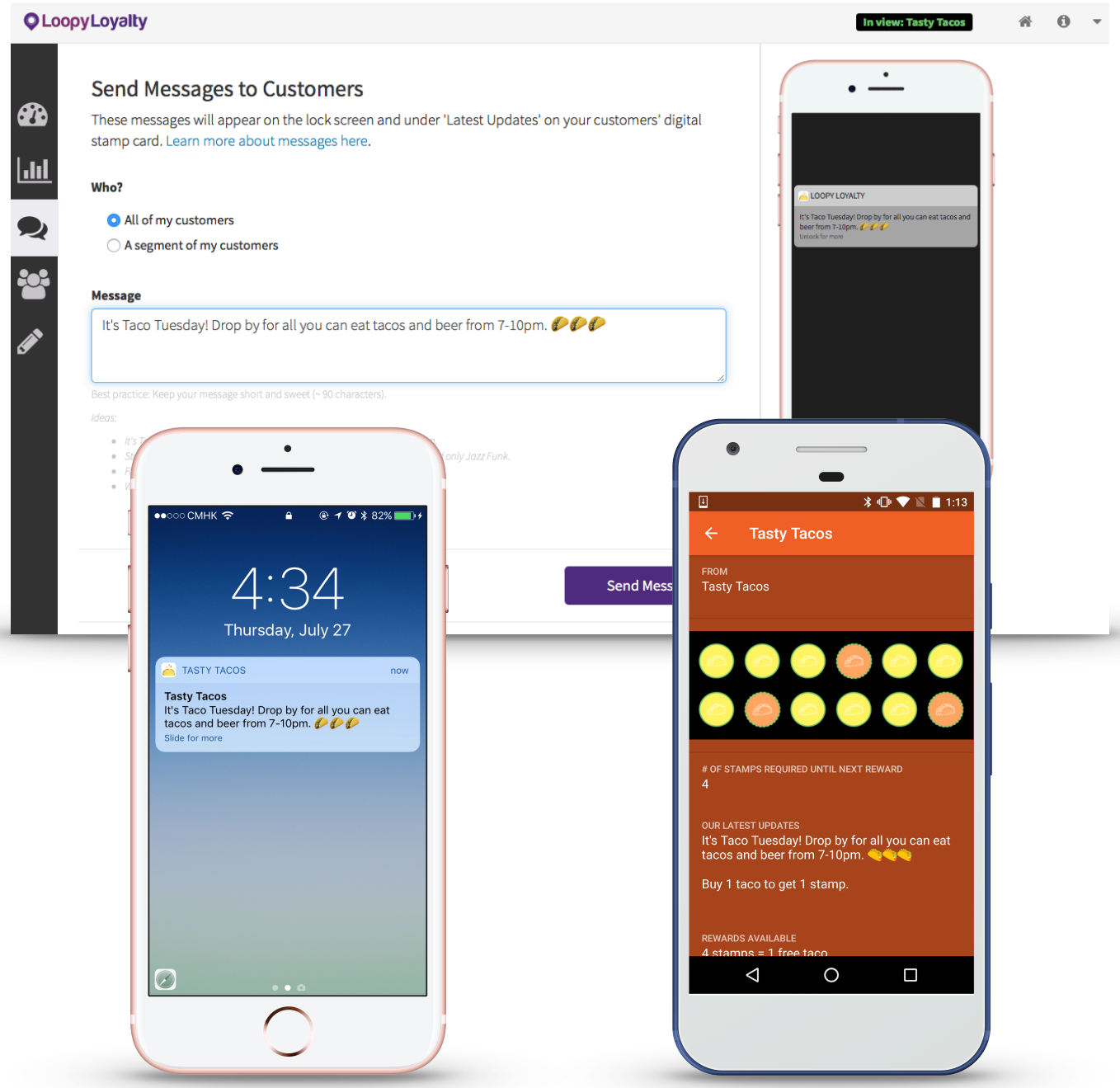
Once your customer has installed your card in their wallet application you can engage with your customers directly via their lock screen.

Use the messages view to send messages to all of your customers or a sub set of your customers. Great examples of messages are informing your customers of special offers, or reminding a segment of customers to collect stamps who may not have visited your business for a while.

Use the customers view to send a message to individual customers. For example, if you know your customer's birthday you might want to send a Happy Birthday message and offer them a special gift if they visit you today.

WITH POWER COMES RESPONSIBILITY

Make sure the messages you send are useful for your customers. If you abuse this powerful engagement channel by sending messages that are not relevant or sending messages too often, your customers may remove the stamp card from their mobile wallet application, or turn off lock screen notifications.



12. ANALYZE & IMPROVE

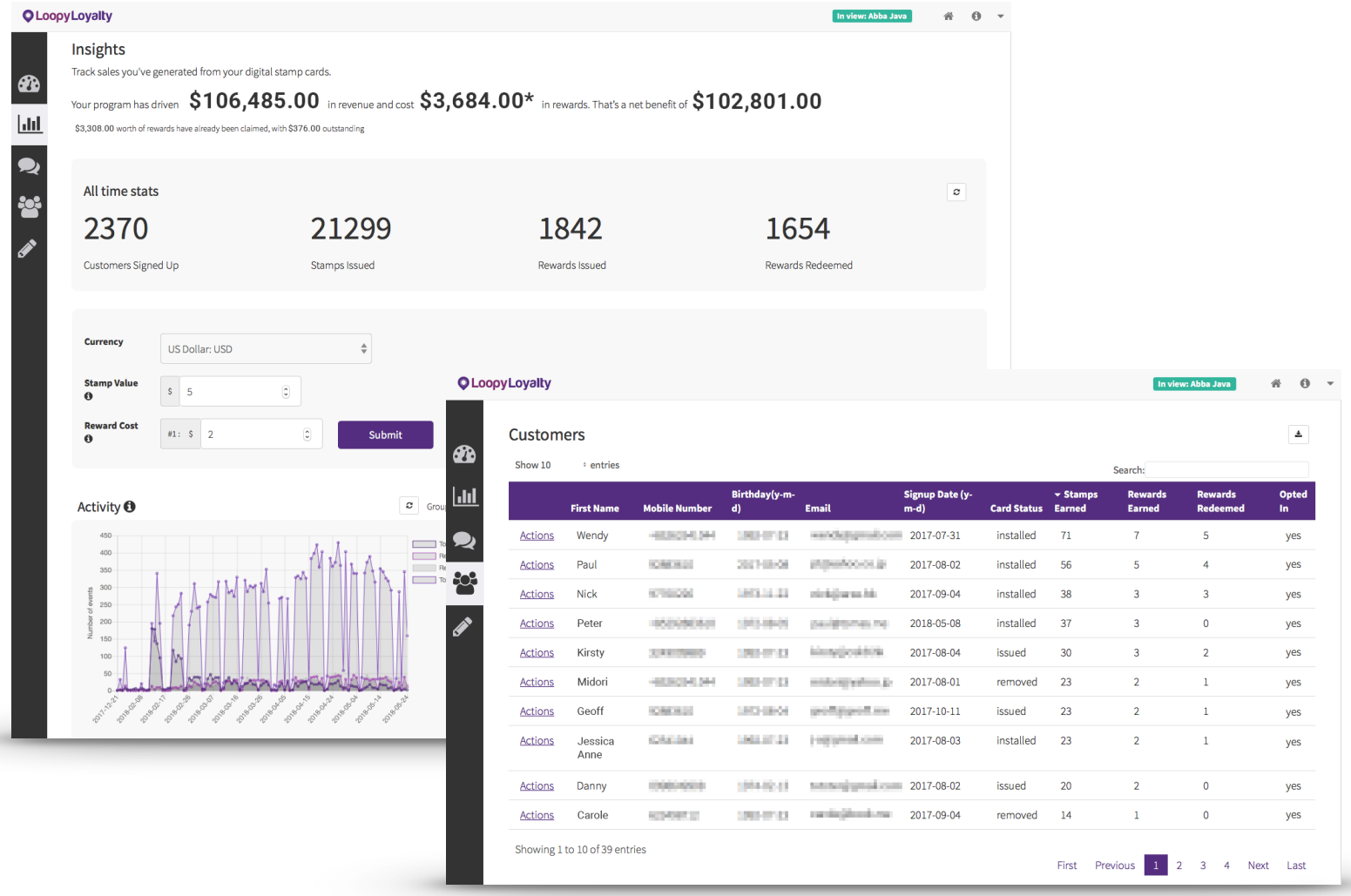
Navigate to your insights view to easily track progress.

Enter the approximate value of 1 stamp, and the approximate cost of the reward(s). Click submit and the gross and net benefit of your loyalty program will be automatically calculated and displayed.

Use the charts to track activity and scroll to the bottom of the page for a list of all transactions. Click on the links for more details of each transaction.

You can also use the customer view for a list of everyone who has joined your loyalty program. You can order the list by the column headings or search for a specific term.

Clicking on Actions takes you to the corresponding customer record. From here you can view their profile, their transaction history, send a message to their lock screen, give stamps, redeem rewards or delete the customer record.



For tutorials and support visit docs.loopyloyalty.com