



LoopyLoyalty

Quick Start Guide

CHEAT SHEET



1.
**CHOOSE A
TEMPLATE**



2.
**DESIGN YOUR
CARD**



3.
**ADD
DETAILS**



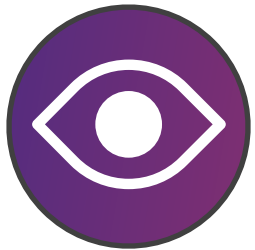
4.
**ADD
LOCATIONS**



5.
**TERMS &
CONDITIONS**



6.
**DATA
COLLECTION**



7.
**SAVE AND
PREVIEW**



8.
**ACTIVATE YOUR
CARD**



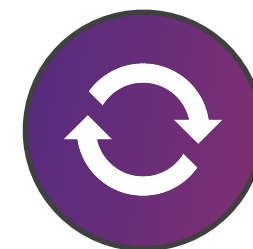
9.
**PROMOTE
EVERYWHERE**



10.
**STAMP. STAMP.
STAMP. STAMP.**



11.
**ENGAGE WITH
MESSAGES**



12.
**ANALYZE &
IMPROVE \$\$\$**



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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.

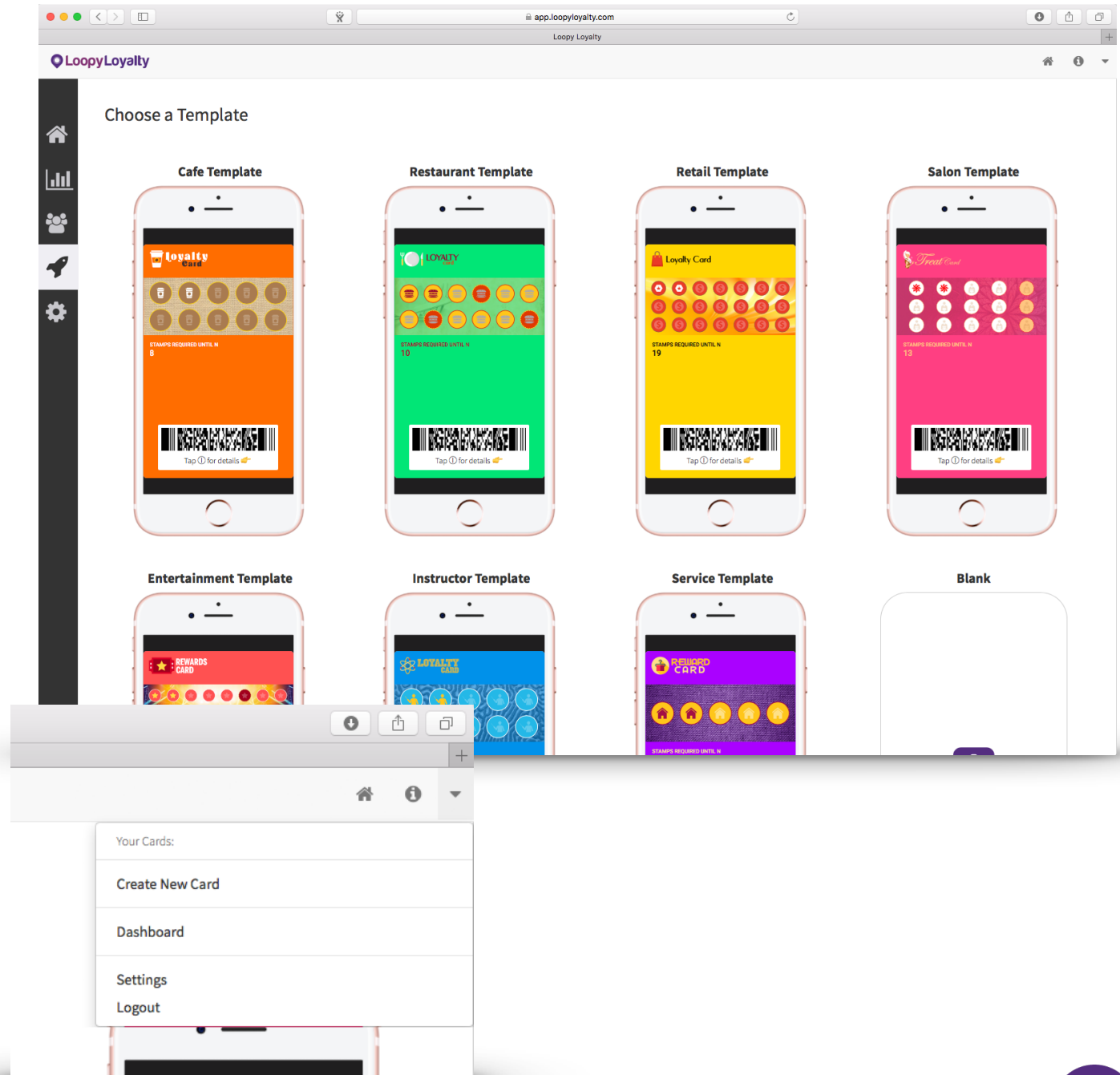
THIS IS MOBILE MARKETING AT ITS FINEST.

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.

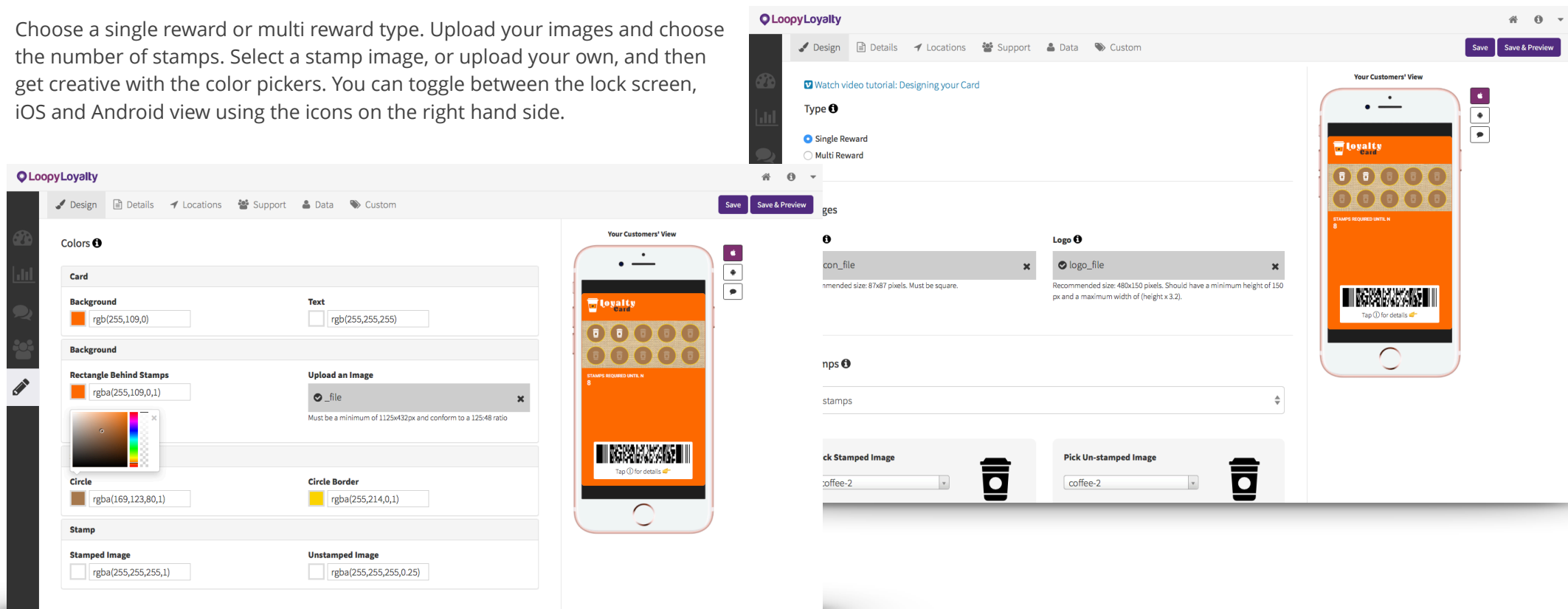


2. DESIGN YOUR CARD

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'.

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Design Details Locations Support Data Custom Save Save & Preview

Reward Name ⓘ

Coffee

Description ⓘ

Get a free coffee of your choice after collecting all stamps.

Stamp success message ⓘ

{#} more stamps until your free coffee!

You must include {#} in your stamp success message. '{#}' is a placeholder for the number of stamps.

Reward success message ⓘ

Congrats! Your next coffee is on the house.

Your Customers' View

Apple Store icon, Download icon, Message icon

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Design Details Locations Support Data Custom Save Save & Preview

Expiry ⓘ

☒ None

☐ Fixed date

☐ Fixed period after signup

Useful Links ⓘ

Tip: add a [link to your address](#) and make it easy for customers to find your business.

Text ⓘ	Link ⓘ	Type ⓘ	Remove
Follow us on Facebook	https://facebook.com/yourbusiness	Url	Remove
Call us at (123) 456 7890	+11234567890	Phone	Remove
Directions to our cafe	10 High Street	Address	Remove

+ Add Link

Your Customers' View

Apple Store icon, Download icon, Message icon

0: Coffee

USEFUL LINKS

Follow us on Facebook

Call us at (123) 456 7890

Directions to our cafe

TERMS & CONDITIONS

1. Get 1 stamp for every regular sized coffee purchased.

2. Collect 10 stamps to receive a free coffee.

3. Stamps and rewards cannot be exchanged, refunded, replaced or redeemed for cash.

4. We reserve the right of final decisions in case of any disputes.

QUESTIONS ABOUT THIS CARD? CONTACT PassKit paul@PassKit.com

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.

The image shows two screenshots of the LoopyLoyalty app interface. The top screenshot displays the 'Add New Location' dialog box. It includes fields for 'Location Name' (Main Store), 'Search for location by address' (1 Madison Avenue, New York, NY, USA), and 'Address to display' (1 Madison Avenue, New York, NY). A map of New York City is visible on the right. The bottom screenshot shows the 'Locations' management screen. It features a table with columns for 'Location', 'Address on Card', 'Display', and 'Message'. The table lists three locations: 'Main Store' (1 Madison Avenue, New York, NY, USA), 'PassKit HQ (Bonham Strand West, 59-67, Hong Kong)', and '18 Grams Wan Chai (10 Johnston Road, Wan Chai, Hong Kong)'. A 'Beacons' section is also visible at the bottom.

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Design Details

Locations ⓘ

Let your customers know where your card be used. You can also trigger [lock screen messages](#) when your customers are near your location(s).

Location ⓘ

No locations added. Please select from the list below.

My Locations ⓘ

- PassKit HQ (Bonham Strand West, 59-67, Hong Kong)
- 18 Grams Wan Chai (10 Johnston Road, Wan Chai, Hong Kong)

Beacons ⓘ

Display beacon based messages when customers are near your beacon(s). [Learn more about beacon based messages.](#)

Beacon ⓘ

No beacons added. Please select from the list below.

Add New Location

Location Name

Main Store

Search for location by address

1 Madison Avenue, New York, NY, USA

Address to display

1 Madison Avenue, New York, NY

Map Satellite

Create Location **Cancel**

Design **Details** **Locations** **Support** **Data** **Custom**

Locations ⓘ

Let your customers know where your card be used. You can also trigger [lock screen messages](#) when your customers are near your location(s).

Location ⓘ	Address on Card ⓘ	Display ⓘ	Message ⓘ
Main Store	1 Madison Avenue, New York, NY	<input checked="" type="checkbox"/>	Welcome to our store. Use your loyalty card to collect points and rewards.

My Locations ⓘ

- PassKit HQ (Bonham Strand West, 59-67, Hong Kong)
- 18 Grams Wan Chai (10 Johnston Road, Wan Chai, Hong Kong)
- Main Store (1 Madison Avenue, New York, NY, USA)

Beacons ⓘ

Display beacon based messages when customers are near your beacon(s). [Learn more about beacon based messages.](#)

Beacon ⓘ

Message ⓘ

No beacons added. Please select from the list below.

Your Customers' View

YOUR BUSINESS

Welcome to our store. Use your loyalty card to collect points and rewards. [Click for more.](#)

Save **Save & Preview**

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.

LoopyLoyalty

Design Details Locations Support Data Custom Save Save & Preview

Terms & Conditions Enabled

1. Get 1 stamp for every regular sized coffee purchased.
2. Collect 10 stamps to receive a free coffee.
3. Stamps and rewards cannot be exchanged, refunded, replaced or redeemed for cash.
4. We reserve the right of final decisions in case of any disputes.

Link to full terms and conditions (optional)

<http://www.yourbusiness.com/termsandconditions>

Your Customers' View

USEFUL LINKS
Follow us on Facebook
Call us at (123) 456 7890
Directions to our cafe

TERMS & CONDITIONS
1. Get 1 stamp for every regular sized coffee purchased.
2. Collect 10 stamps to receive a free coffee.
3. Stamps and rewards cannot be exchanged, refunded, replaced or redeemed for cash.
4. We reserve the right of final decisions in case of any disputes.

QUESTIONS ABOUT THIS CARD? CONTACT
Your business
support@yourbusiness.com

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Design Details Locations Support Data Custom Save Save & Preview

2. Collect 10 stamps to receive a free coffee.
3. Stamps and rewards cannot be exchanged, refunded, replaced or redeemed for cash.
4. We reserve the right of final decisions in case of any disputes.

Link to full terms and conditions (optional)

<http://www.yourbusiness.com/termsandconditions>

Card Issuer Details

Please provide contact information for customers who have queries, complaints, or claims with respect to your digital stamp card.

Business Name

Your business

Email

support@yourbusiness.com

Phone

1234567890

Your Customers' View

USEFUL LINKS
Follow us on Facebook
Call us at (123) 456 7890
Directions to our cafe

TERMS & CONDITIONS
1. Get 1 stamp for every regular sized coffee purchased.
2. Collect 10 stamps to receive a free coffee.
3. Stamps and rewards cannot be exchanged, refunded, replaced or redeemed for cash.
4. We reserve the right of final decisions in case of any disputes.

QUESTIONS ABOUT THIS CARD? CONTACT
Your business
support@yourbusiness.com
1234567890

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.

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Design Details Locations Support **Data** Custom Save Save & Preview

[Watch video tutorial: More Customisations](#)

Data Collection

Ask your customers to enter their details before installing your card. The fields you select below will appear on your enrollment page.

[Why collect data and what data should I collect?](#)

Description	Format	Mandatory
Name	<div>Text Number Date Email URL Mobile/telephone number Mobile/telephone number</div>	<input checked="" type="checkbox"/>
Email address		<input type="checkbox"/>
Contact Number		<input type="checkbox"/>
Birthday	Date	<input type="checkbox"/>

Your Customers' View

Loyalty Rewards Card

Please enter your details

Name*

Email address*

LoopyLoyalty

Design Details Locations Support **Data** Custom Save Save & Preview

Select a default country for phone number field(s)

United States of America (the)

Unique Customer Enrollments

☒ Enable automatic checks against unique customer field(s) to prevent the same customer from enrolling more than once. You can select a maximum of 3 unique fields.

Description	Format	Enable
Email address	Email	<input checked="" type="checkbox"/>
	Mobile/telephone number	<input type="checkbox"/>
	Text	<input type="checkbox"/>

Data Consent

Ask your customers to agree that their personal data may be used for direct marketing purposes.

Your Customers' View

Loyalty Rewards Card

Please enter your details

Name*

Email address*

7. SAVE & PREVIEW

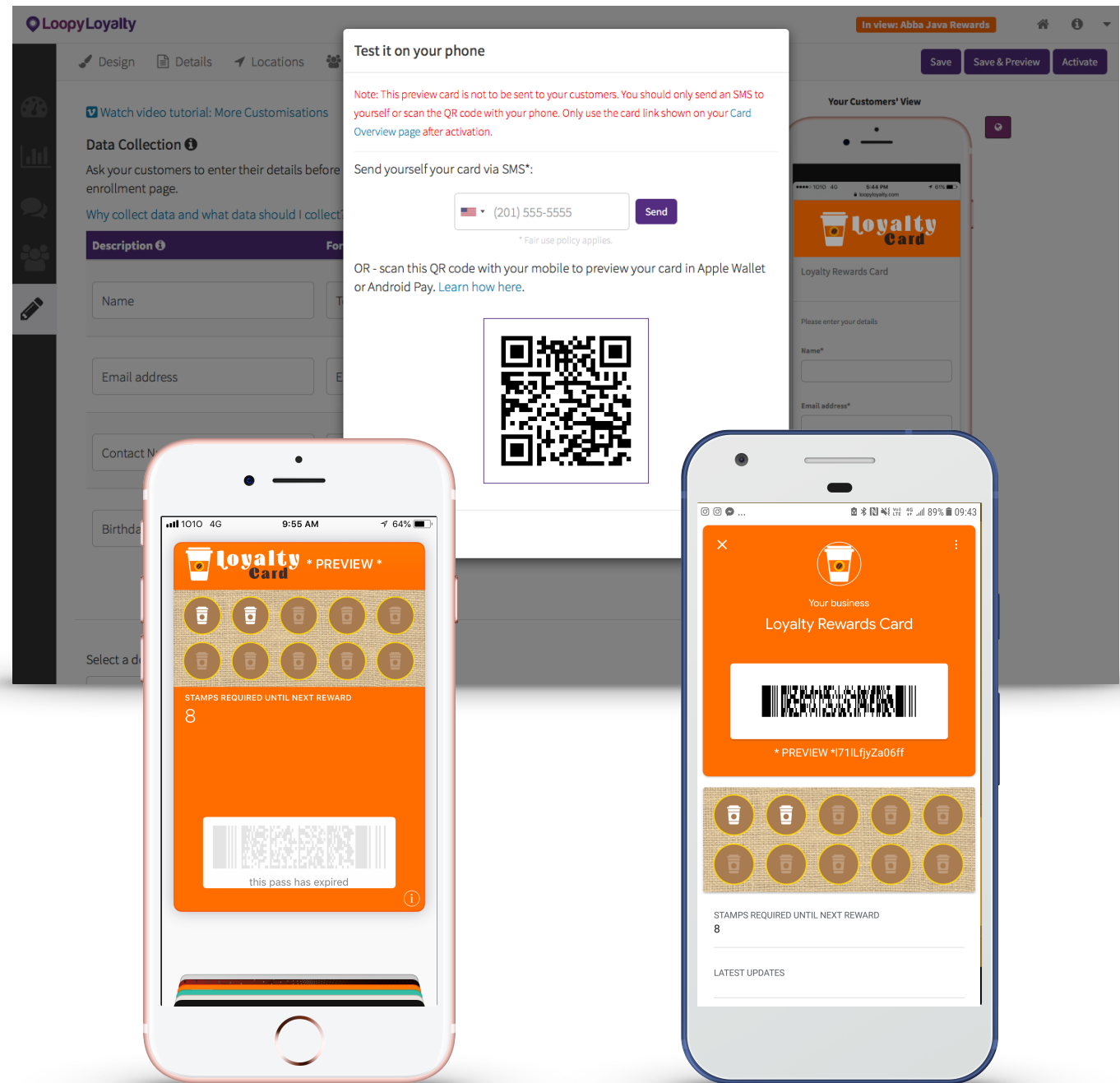
Click save and name your card design. This name won't be visible by your customers so you can call it whatever you want.

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

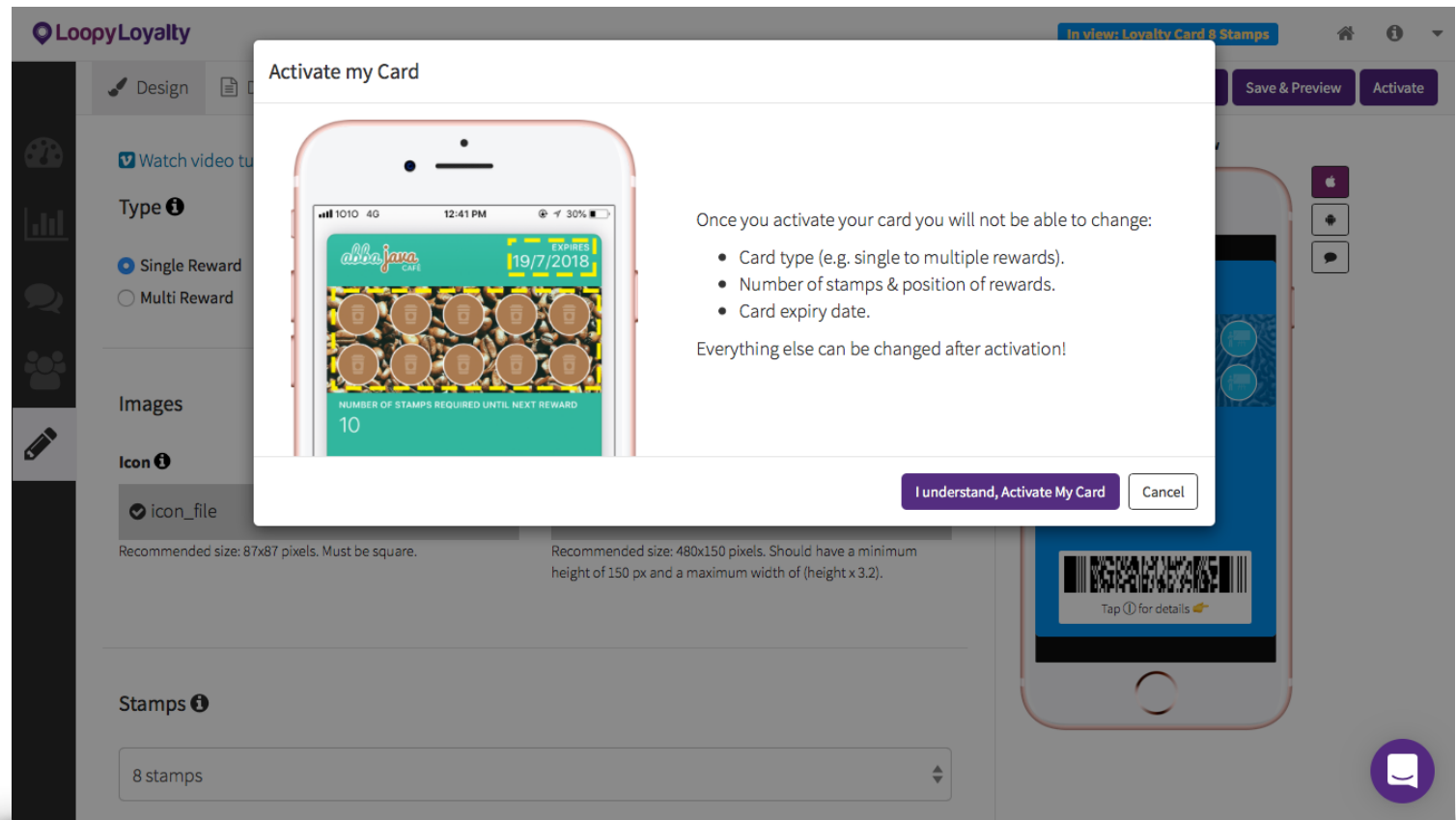
e.g. if you selected a multi reward card, you can not change the position of a reward from stamp 3 to stamp 4.

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 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.

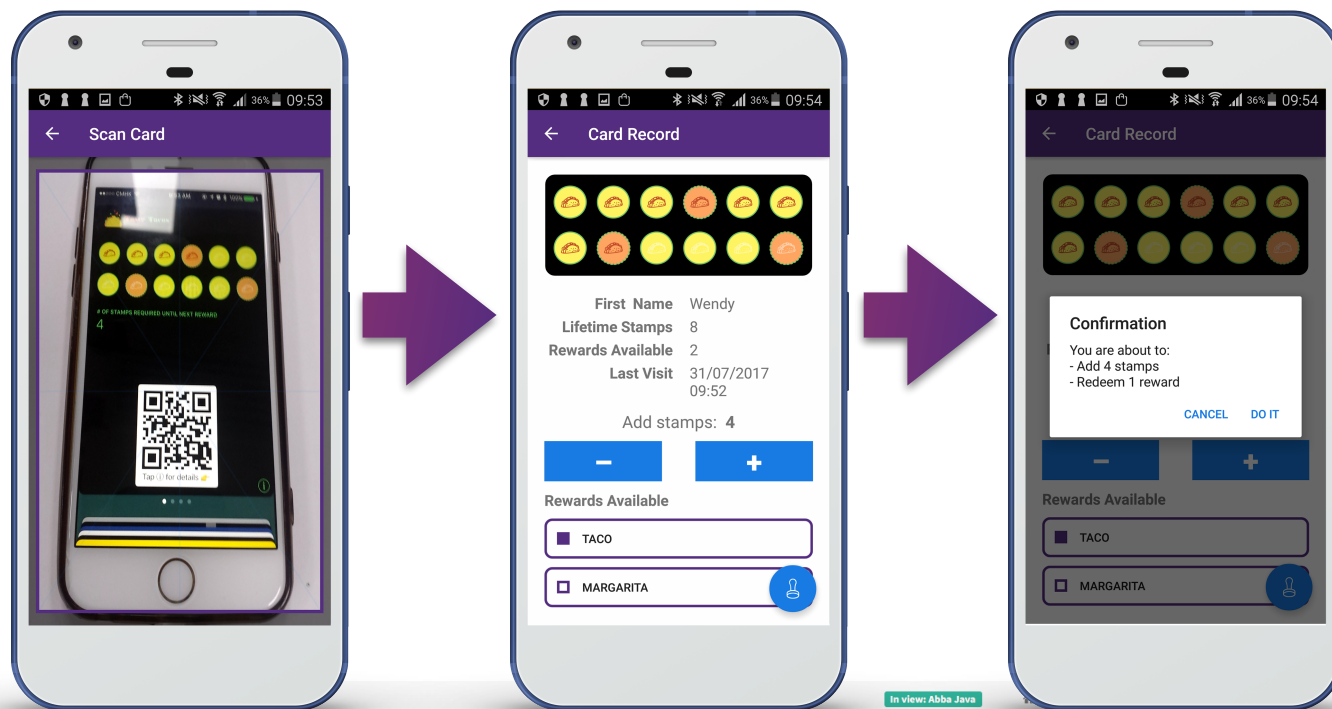
Promote offline

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.

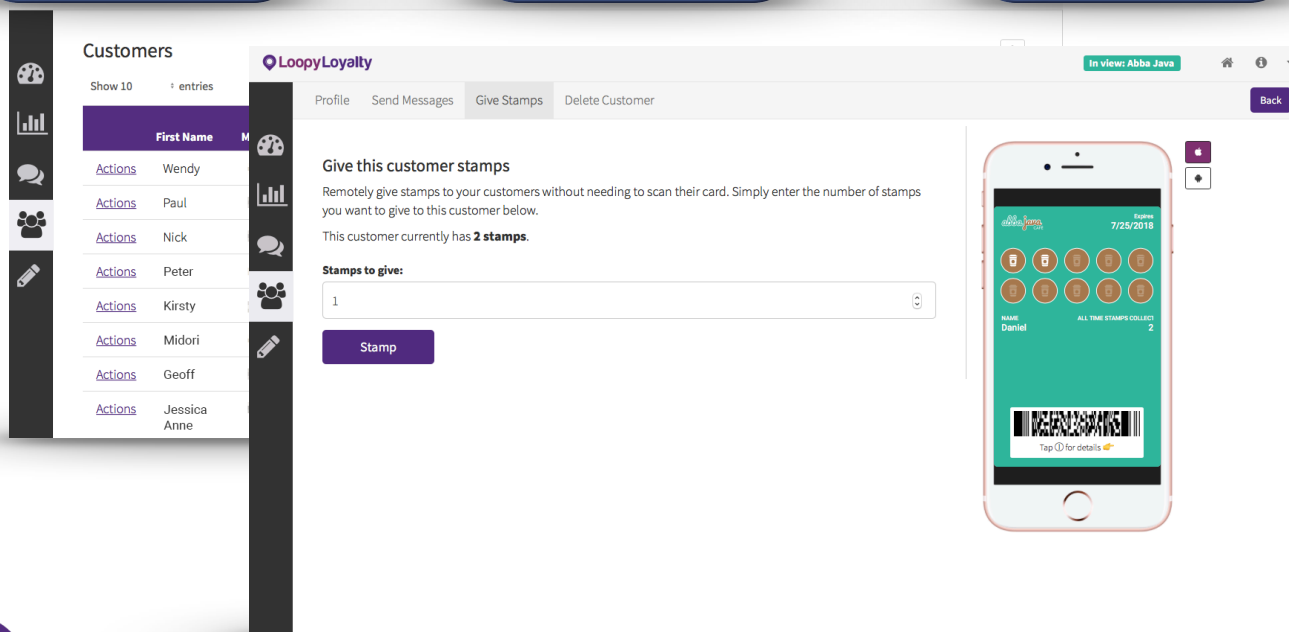
URL Shortening

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

The image is a composite showing three different ways to promote the LoopyLoyalty digital stamp card. At the top is a screenshot of the LoopyLoyalty dashboard. It features a sidebar with icons for a menu, analytics, messages, users, and a pencil. The main area has four large zeroed-out counters: 'Customers Signed Up', 'Stamps Issued', 'Rewards Issued', and 'Rewards Redeemed'. Below these are two tables: 'Latest Transactions' and 'Push Message History', both showing 'No data available in table'. On the right side of the dashboard, there's a section for 'Your Card URL' with the link 'https://loyalty.is/w5pm5a' and a 'Copy link' button. Below the URL is a QR code. A tip at the bottom right of the dashboard says: 'Tip: do not use the Apple Wallet barcode scanner to scan this QR code. How to save your card in your smartphone'. In the bottom left, there's a screenshot of a Facebook post for 'Abba Java Cafe' (@abbajava). The post includes a QR code and text: 'Get our brand new loyalty rewards card in your mobile wallet. Visit https://loyalty.is/w5pm5a on your smartphone and Add to #AppleWallet or Save to #GooglePay'. The post also has hashtags #rewardingloyalty, #customerconvenience, and #loyaltycard. In the bottom right, there's a 3D rendering of a promotional poster for 'Abba Java Cafe'. The poster features a large image of a latte with a leaf design. Text on the poster includes 'YOUR DIGITAL LOYALTY CARD wt.is/9k', 'Get Rewarded', 'SCAN HERE TO GET YOUR DIGITAL LOYALTY CARD', a QR code with 'wt.is/9k', and 'Double Stamps 3pm to 5pm'. A smartphone in the foreground shows the 'loyalty Card' app interface with a progress bar and 'STAMPS REQUIRED UNTIL NEXT REWARD: 8'.



In view: Abba Java



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

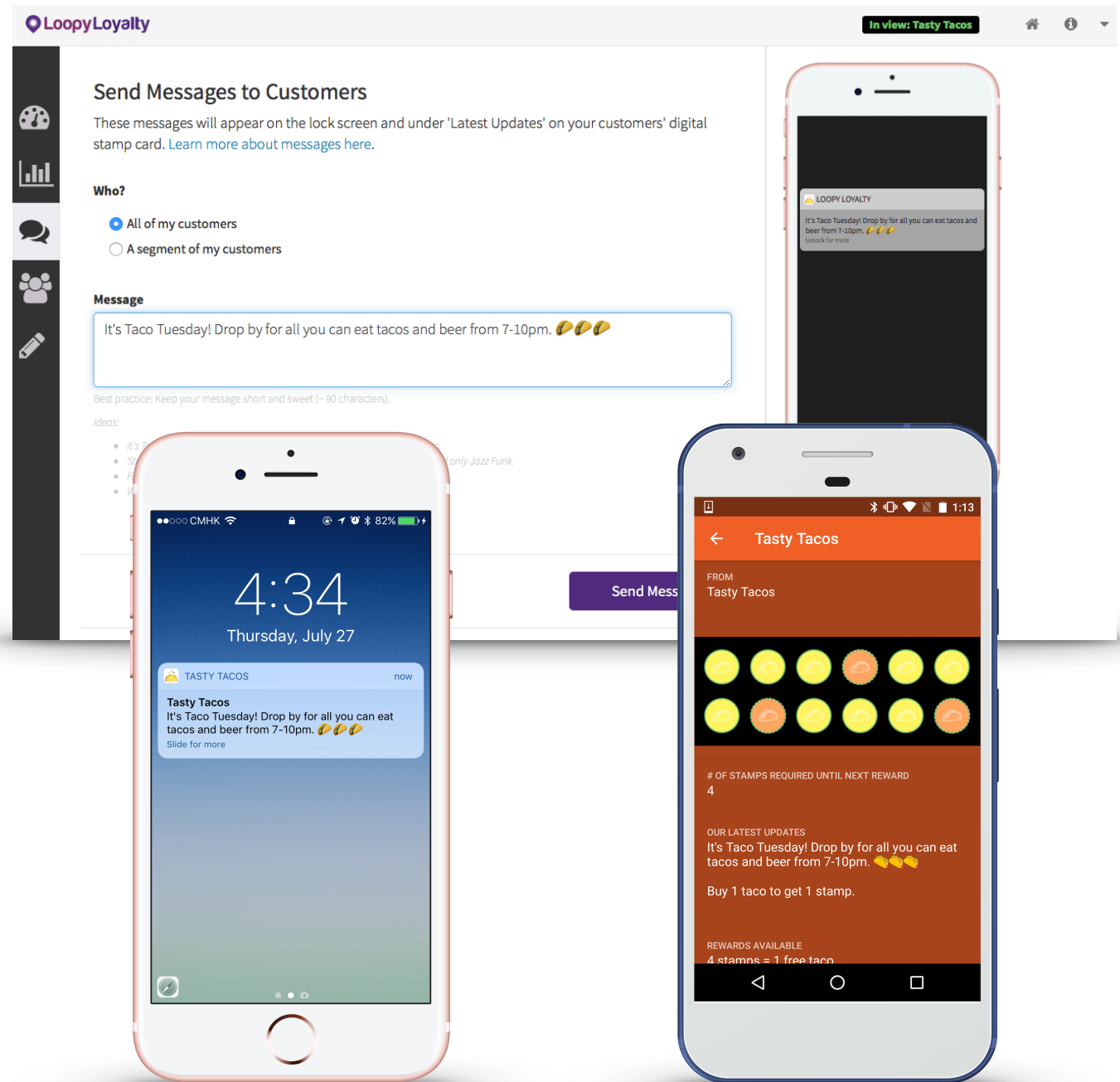
Once your customer has installed your card in their wallet application you can engage with your customers directly via their lock screen.

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

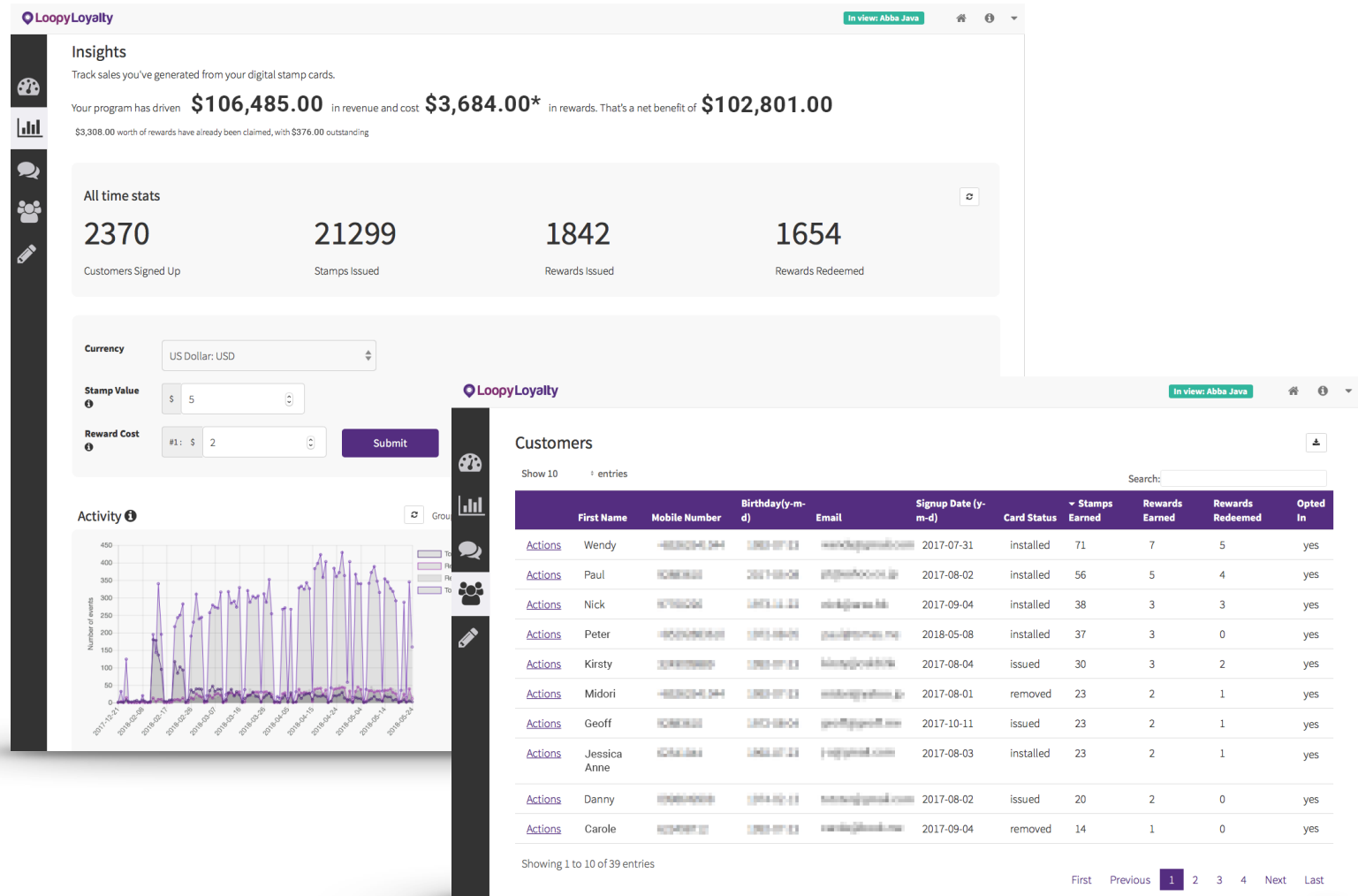
Navigate to your insights view to easily track progress.

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
