



# Using SalesBuilder Marketing & Loyalty with your Vital Link POS System



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## Introduction

The Salesbuilder marketing & loyalty solution is a powerful way to keep in touch with your customers and reward them for visiting your restaurant(s). When combined with the VitalLink POS system in the store, it's a easy, automated way to gather and consolidate data on all your customers. A powerful, multi-store customer database makes it easy to target your marketing message. VitalLink will update Salesbuilder every time your customer orders - from any store location - so Salesbuilder will have a complete picture of your customer history - from your best customers to those who need a reminder to return. Salesbuilder's automated e-mail marketing campaigns ensure that your customers are never forgotten, while powerful on-the-fly campaigns let you trigger a sales boost whenever you want!

For an overview of how Salesbuilder and VitalLink work together, please see this training video: <http://bit.ly/KOuxZb>

## Foundation: A Few Choices

Before you get started, you need to make a few decisions about how you want to set up the program.

### *Using Loyalty Cards?*



You can issue physical loyalty cards to your customers if you wish, but it is not required. If you use bar coded or magnetic stripe cards, you can scan these at the POS to identify the customer. If you don't use a card, you can simply look up the customer using their phone number, name, any number you wish to assign to as their loyalty ID.

Advantages of using cards	Disadvantages of using cards
<ul style="list-style-type: none"><li>● Cards with your logo may serve as a billboard in your customers' wallet or keychain, always reminding them about your restaurant.</li><li>● Swiping a card is a quick and easy way to look up the customer.</li></ul>	<ul style="list-style-type: none"><li>● Customers may think that carrying a card is a hassle</li><li>● Cards cost money</li><li>● You will need new scanners at each register, if you use barcoded cards. Magnetic stripe cards are also an option.</li></ul>

## ***Earning Rewards: Salesbuilder, VitalLink or Both?***

Most loyalty programs include a points and rewards component. With Salesbuilder & VitalLink, you have two different points programs to choose from:

<b>Salesbuilder Points</b>	<b>VitalLink Points</b>
<ul style="list-style-type: none"><li>• Points earned per \$ spent, with multiplier option for day of week</li></ul>	<ul style="list-style-type: none"><li>• Points earned in up to 10 separate “buckets” for different prizes. Awards can accumulate based on dollars spent or specific food items with sizes. For instance, a Buy 10 Get 1 Free Slice club and a Free Dessert after spending \$100 club. Or 1 point for a small coffee, 2 points for a medium, 5 points for a large.</li></ul>
<ul style="list-style-type: none"><li>• Customer is notified of available rewards when they receive an emailed coupon</li></ul>	<ul style="list-style-type: none"><li>• Customer is notified of total points by printing on the receipt (will not be emailed automatically)</li></ul>
<ul style="list-style-type: none"><li>• Reward “coupons” are redeemed for rewards of your choice</li></ul>	<ul style="list-style-type: none"><li>• Rewards are redeemed at time of order for the specified amount</li></ul>
<ul style="list-style-type: none"><li>• Points can accumulate from multiple locations integrated with SalesBuilder &amp; online orders</li></ul>	<ul style="list-style-type: none"><li>• Points can accumulate from multiple locations using VitalLink.</li></ul>

So which should you choose? If you are using Salesbuilder, it is likely you will want to use the points accumulated by the Salesbuilder program to automatically generate e-mail rewards for your customers. You may wish to limit the program to this. You may want to supplement your program with “surprises” or specific item incentives through Vital Link. You can also use the VitalLink buckets to accumulate an overall, long term spending reward, where SalesBuilder issues rewards more frequently. It’s up to you!

## **Set Up Your Program**

Ready to get started? Your GRS Implementation Consultant will assist you with setting up your SalesBuilder program. But here is an overview of the options you will be reviewing.

### ***Set up Salesbuilder***

#### **Salesbuilder Basics**

You’ll need to decide a few basics, like what will you call your program? How much does a customer need

to spend to get what level of reward? Will you want to designate any days as “double” point days?

Salesbuilder works off a standard “Campaign”. For each campaign element, you’ll need to decide on what reward you wish to offer. For example, some of the campaign elements will include:

- Welcome - sent when someone joins the program
- Birthday - sent 10 days before customers’ birthday
- Anniversary - sent 10 days before customers’ anniversary
- Half Birthday - sent 6 months after the customers’ birthday
- Website activation - sent when someone activates their account profile page
- Customer Satisfaction Survey - sent periodically asking for feedback
- Refer a Friend - Sent when a member refers a new customer
- Lost - Sent when a member has not visited in 60 days
- Reward - Sent when a member has accumulated a number of points.

One thing to know - your rewards program will have its very own URL! Your implementation consultant will let you know what this URL is and this will be used throughout the program.

## Setting Up Offers

The first step to setting up your loyalty campaign is to set up the offers in Salesbuilder. Navigate to Campaigns / Offers and you’ll see a list of offers in your account.

Granbury Sales Builder

Home Online Email Contacts Calendar Customers Leads Affiliates Transactions Campaigns Broadcast My Account Website Admin

**Offers**

Campaigns Media Library **Offers** Global Forms Lists Sites

Add New Offer

Offers linked to media: - No Media Selected - Category: Granbury Sales Builder

OID	AID	OfferName	Category	Type	Master Sync	Parent Sync
102	429135	<b>\$10 Off Your Purchase of \$20 or More!</b> - Get \$10 off your purchase next time you spend \$20 or more at Smugala's! One certificate per table per visit. Not valid with any offers or discounts. Tax and gratuity not included.	Granbury Sales Builder	Online	Yes	Yes
103	429135	<b>\$5 Off Your Purchase of \$20 or More!</b> - Take \$5 off your next purchase of \$20 or more at Smugala's! One certificate per table per visit. Not valid with any other offers or discounts. Tax and gratuity not included.	Granbury Sales Builder	Online	Yes	Yes
105	429135	<b>\$5 Reward</b> - Congratulations, You've earned a reward! Use this for \$5 off your next purchase. Not valid with any other coupons, offers or specials.	Granbury Sales Builder	Online	Yes	Yes
101	429135	<b>10% Off Your Meal!</b> - Get 10% off when you visit to Smugala's! One per table, per visit. Food purchase - Dine In Only. Not valid with any other promotion.	Granbury Sales Builder	Online	Yes	Yes
104	429135	<b>15% Off Your Next Purchase!</b> - Visit Smugala's and enjoy 15% off your total purchase! One per table, per visit. This is valid for food purchases, Dine-In only. Not valid with any other promotion.	Granbury Sales Builder	Online	Yes	Yes

Click on “Add New Offer” to set up a new offer. You’ll just need to give the Offer ID (remember, this needs to match the offerID in your POS system), the offer name, and description.

## Setting up your campaign

Once you've got all your offers in the system, you can decide which offer will be linked to each "Campaign Message". Just navigate to Campaigns and select the Campaign name that is listed there. You should see a screen like this:

The screenshot shows the Granbury Sales Builder interface. At the top, there is a navigation menu with options: Home, Online, Email, Contacts, Calendar, Customers, Leads, Affiliates, Transactions, Campaigns, Broadcast, My Account, Website, and Admin. Below the navigation menu is a header for "Media Library - Media Linked to 'Smugalas'". The interface includes a search bar, a dropdown menu for "Customers", and a "Search" button. Below the search bar is a table of media items.

PID	AID	MediaName	Category	Status	Type	Trigger (Id,X,Y)	Offers	Master Sync	Parent Sync
1	429135	<a href="#">WELC - Welcome</a>	Granbury Sales Builder	Active	Email	15,1,30	101	No	Yes
3	429135	<a href="#">ANNI - Happy Anniversary</a>	Granbury Sales Builder	Active	Email	40,,30	102	No	Yes
4	429135	<a href="#">BDAY - Happy Birthday</a>	Granbury Sales Builder	Active	Email	20,,30	102	No	Yes
5	429135	<a href="#">HBDA - Happy Half-Birthday</a>	Granbury Sales Builder	Active	Email	30,,30	103	No	Yes
7	429135	<a href="#">RWRD - Congratulations - You Earned a Reward</a>	Granbury Sales Builder	Active	Email	70,100,0	105	No	Yes
9	429135	<a href="#">CSSU - Customer Satisfaction Survey</a>	Granbury Sales Builder	Active	Email	80,30,60	none	No	Yes
10	429135	<a href="#">BDAY - Extra Birthday</a>	Granbury Sales Builder	Active	Email	25,,30	102	No	Yes
11	429135	<a href="#">REFR - Refer A Friend</a>	Granbury Sales Builder	Active	Email	90,,30	101	No	Yes
12	429135	<a href="#">WEBS - Website</a>	Granbury Sales Builder	Active	Email	5,,30	103	No	Yes
25	429135	<a href="#">LOST - We Miss You</a>	Granbury Sales Builder	Active	Email	50,60,30	104	No	Yes
31	429135	<a href="#">Newsletter</a>	Granbury Sales Builder	Inactive	Email	60,,	none	No	Yes
1006	429135	<a href="#">ACTIV - Activate your account</a>	Granbury Sales Builder	Active	Email	10,,	none	No	Yes

To associate an offer with the campaign step, just click on the hyperlink in the "Offers" column. From the next screen, you can choose available offers from the drop down and "Link" to this campaign.

**Offers**

Campaigns | Media Library | **Offers** | Global | Forms | Lists | Sites

Add New Offer

Offers linked to media:  Category:

OID	AID	OfferName	Category	Type	Master Sync	Parent Sync	
	102	429135	<b>\$10 Off Your Purchase of \$20 or More!</b> - Get \$10 off your purchase next time you spend \$20 or more at Smugala's! One certificate per table per visit. Not valid with any offers or discounts. Tax and gratuity not included.	Granbury Sales Builder	Online	Yes	Yes
	103	429135	<b>\$5 Off Your Purchase of \$20 or More!</b> - Take \$5 off your next purchase of \$20 or more at Smugala's! One certificate per table per visit. Not valid with any other offers or discounts. Tax and gratuity not included.	Granbury Sales Builder	Online	Yes	Yes
	105	429135	<b>\$5 Reward</b> - Congratulations, You've earned a reward! Use this for \$5 off your next purchase. Not valid with any other coupons, offers or specials.	Granbury Sales Builder	Online	Yes	Yes
	101	429135	<b>10% Off Your Meal!</b> - Get 10% off when you visit to Smugala's! One per table, per visit. Food purchase - Dine In Only. Not valid with any other promotion.	Granbury Sales Builder	Online	Yes	Yes
	104	429135	<b>15% Off Your Next Purchase!</b> - Visit Smugala's and enjoy 15% off your total purchase! One per table, per visit. This is valid for food purchases, Dine-In only. Not valid with any other promotion.	Granbury Sales Builder	Online	Yes	Yes

## Creating your Email Messages

Salesbuilder comes with some pre-formatted messages that will be sent with each campaign step. You can modify the wording of these message or add your own graphics and html formatting. From the Media Library Screen (pictured above), just click on the name of the Campaign element to edit it. You can also click on the link that says "email" to send yourself a test email.

Note: If you will be creating html messages with images, you'll need to load your images onto the salesbuilder server first. Navigate to Broadcast / Files, and select Upload a File. Once these are saved, you can access them to insert into HTML emails.

## Importing customers

If you've got an email list already, you may want to import it into Salesbuilder so you can communicate with these customers. It is best to import these names as "leads" since they are not already enrolled in your loyalty program. To do this, go to Leads / Import. If you wish to automatically assign these leads to a campaign upon import, you can do so here, or you can wait until they are already imported.

## Set up Vital Link POS

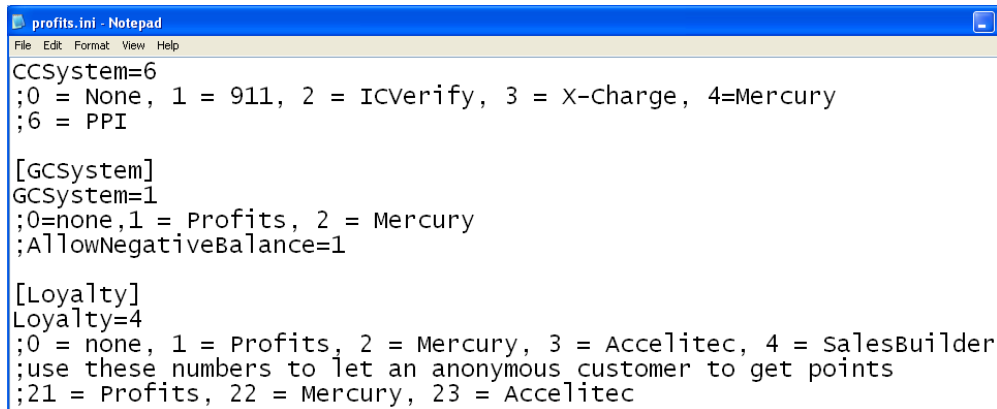
### Setting Up Loyalty

The VitalLink system must be configured at each store.

## Step 1: Activate Loyalty in “Profits.ini”.

NOTE: This step will be taken care of by a GRS technician!

- Navigate to Windows / profits.ini. You can choose a program such as Notepad to open this file with.
- Scroll down to the section titled “Loyalty”
- Make sure the setting is specified as “Loyalty = 4”



```
profits.ini - Notepad
File Edit Format View Help
CCSystem=6
;0 = None, 1 = 911, 2 = ICverify, 3 = X-Charge, 4=Mercury
;6 = PPI

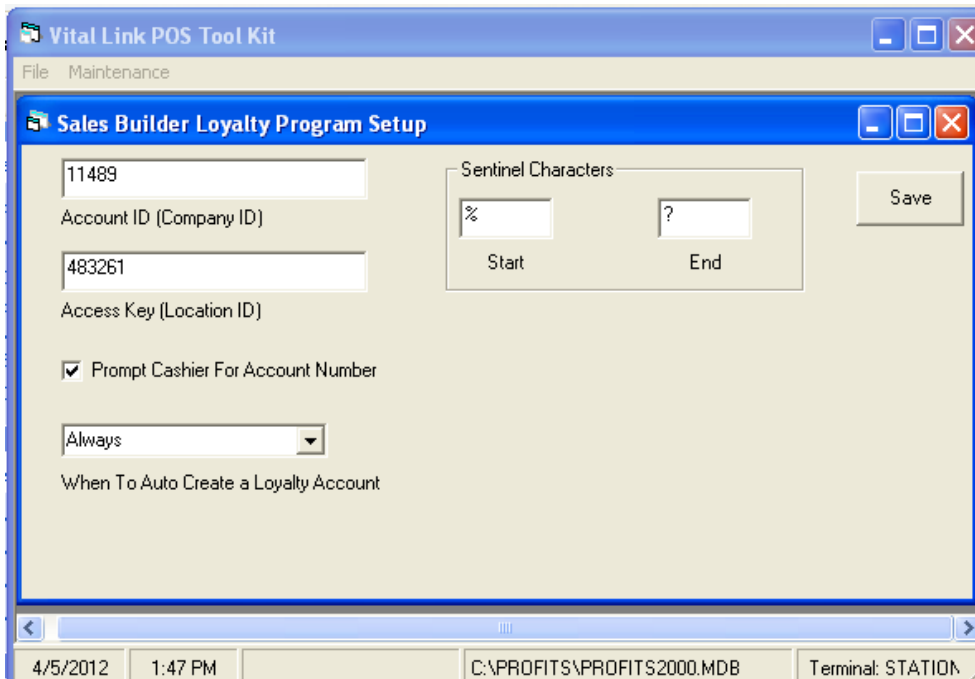
[GCSYSTEM]
GCSYSTEM=1
;0=none,1 = Profits, 2 = Mercury
;AllowNegativeBalance=1

[Loyalty]
Loyalty=4
;0 = none, 1 = Profits, 2 = Mercury, 3 = Accelitec, 4 = SalesBuilder
;use these numbers to let an anonymous customer to get points
;21 = Profits, 22 = Mercury, 23 = Accelitec
```

## Step 2: Configure Loyalty in VL Toolkit

- In VL Toolkit, navigate to Maintenance, SalesBuilder
  - Enter the SalesBuilder AccountID and Access Key.
  - Select “Prompt Cashier for Account Number” if you will be using loyalty cards. Otherwise, the system will automatically assign the phone # as an account #.
  - Select When to Create Loyalty Account. Options include:
    - Never - will not connect customers to SalesBuilder
    - Use Radio Button on Form - Gives you a choice prior to looking up a customer.
    - Always - will prompt cashier to enroll customer upon lookup
    - Ask Cashier - will ask cashier if they want to enroll the customer.
- NOTE: Recommended setting is Always.**
- Sentinel Characters: If using a swipe card as a loyalty card, the number will generally be encoded with characters designating the start and end. For example, if you swipe the card in notepad, you will see %12345?. Enter the % as the start and the ? as the end. This is not required if you are using barcoded cards or no cards.





### Step 3: Configure VitalLink Loyalty Setup

- In VitalLink Toolkit, Select Maintenance / Loyalty Setup.
- Configure 1 dollar = 1 points
- Select your preferred rounding method and Gross vs. Net setting.
- The “point banks to update” is required if using the internal VitalLink point buckets only.



### Step 4 (Optional): Configure Internal VitalLink Point Buckets, if using

- In VitalLink Toolkit, select Maintenance / Loyalty Awards, and configure up to 10 different in-store loyalty reward programs. This is where you configure what the coupon will say and how many points are necessary to get the award.
- Select Maintenance / Loyalty Set up to configure any of the 10 programs as a \$ spent reward.

- In Menu / Pricing configuration, associate particular menu items with your reward programs. You specify how many points get awarded for each items size.

For more detailed information on how to set up the in-store loyalty program, visit our [Learning Center](#).

## Step 5: Configure SalesBuilder Reward Coupons in VitalLink

- In the VitalLink Management Tool, navigate to General / Order Adjustments (Coupons)
- Add a coupon for each individual offer that you will be using in SalesBuilder.
- Be sure to enter the “Offer ID” to match the offer ID in SalesBuilder.
- You do not have to add these offers to the menu. The VitalLink coupon will be applied automatically when the cashier scans the Salesbuilder coupon

## Step 6: Configure the Order Type / Station Flow to send Loyalty Transactions

- In the Vital Link Management Tool, Navigate to General, Order Type / Station Flow.
- Select an order type, and then check the “Loyalty” box under the station immediately before “Complete”. For example, on the picture below we have checked Loyalty for pick-up orders on station “Order Due”. This controls when the loyalty rewards will print for the customer (for Vital Link in-store rewards) and be sent to SalesBuilder.
- Do this for all order types. For deliveries, it is recommended that you check Loyalty for the order type immediately prior to “On the Road”.

Order Types and Station Flows

Order Type	Description	Type	Seq	Tax-able?	Table Req?	Comp on Coll	Prt on Coll	Name Req?	Cust Look	No Payee Assign?	Qualified Gross Rct?	Act?
Dine-In	Dine-In	Dine-In	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delivery	Delivery	Delivery	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pickup	Pickup Orders	Carryout	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CarryOut	CarryOut	Carryout	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
*			0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Station Flow for Order Type: Stations Printers Actual Time: 0 Default Time: 0

Station	Seq	Auto Move?	New Order on update?	Expeditor?	Recipe?	Product Print?	Receipt	Print? / Printer / Copies
Order	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer: <input type="checkbox"/>	<input type="checkbox"/>
	Warn Min. 0						Preparation: <input checked="" type="checkbox"/>	<input type="checkbox"/>
	Caution Min. 0						Dispatch: <input type="checkbox"/>	<input type="checkbox"/>
							Dispatch Label: <input type="checkbox"/>	<input type="checkbox"/>
							Gift Card: <input type="checkbox"/>	<input type="checkbox"/>
							Loyalty: <input checked="" type="checkbox"/>	<input type="checkbox"/>
OrderDue	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer: <input type="checkbox"/>	<input type="checkbox"/>
	Warn Min. 0						Preparation: <input checked="" type="checkbox"/>	<input type="checkbox"/>
	Caution Min. 0						Dispatch: <input type="checkbox"/>	<input type="checkbox"/>
							Dispatch Label: <input type="checkbox"/>	<input type="checkbox"/>
							Gift Card: <input type="checkbox"/>	<input type="checkbox"/>
							Loyalty: <input checked="" type="checkbox"/>	<input type="checkbox"/>
Complete	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer: <input type="checkbox"/>	<input type="checkbox"/>
	Warn Min. 0						Preparation: <input type="checkbox"/>	<input type="checkbox"/>
	Caution Min. 0						Dispatch: <input type="checkbox"/>	<input type="checkbox"/>
							Dispatch Label: <input type="checkbox"/>	<input type="checkbox"/>
							Gift Card: <input type="checkbox"/>	<input type="checkbox"/>
							Loyalty: <input type="checkbox"/>	<input type="checkbox"/>

Check This Box for each order type

## Your Network

Depending on your network settings and firewall configuration, you may need to allow traffic between your store and the Salesbuilder web server (The URL is: <http://www.granburysalesbuilder.net/grsSalesBuilder.svc?wsdl>). Please contact your network technician to configure this properly and securely.

## Set up online ordering

If your online order provider integrates with SalesBuilder, customers will be able to enroll and look themselves up on your on line ordering web site. Once they identify themselves as a SalesBuilder member, they'll be able to redeem their SalesBuilder offers. Again, any offers should match to both VitalLink and Salesbuilder.


The online transaction will be sent to the POS system with the customer's Salesbuilder ID identified, as well as any SalesBuilder offers redeemed on the transaction. The POS system will be responsible for finalizing the transaction.

For GRS online ordering (LetsGet), you need to set up the following in the Lets Get Administrative portal:

Navigate to "Accounts" and about halfway down in the "Marketing" section, select Marketer = SalesBuilder.

Enter the Salesbuilder account ID in the “Loyalty program company ID” field. Enter your Loyalty program name and upload an image to represent your Loyalty program, if desired.

**Marketing:**

Marketer	<input type="text" value="SalesBuilder"/>
Loyalty Program Company ID	<input type="text" value="12014"/>
Loyalty Program Name	<input type="text" value="Granbury Rewards"/>
Loyalty Program HTML	<div style="border: 1px solid black; height: 50px;"></div>
Loyalty Program Mobile HTML	<div style="border: 1px solid black; height: 50px;"></div>
Loyalty Program Image max wd: 200 max ht: 100 max: 50 Kb	<div style="border: 1px solid black; padding: 5px; text-align: center;"></div>
<input type="button" value="Choose File"/>	No file chosen
<input type="button" value="Add"/>	<input type="button" value="Clear"/>

Next, navigate to “Location & Menus” and choose Edit. About halfway down, the Marketing section should contain the Salesbuilder Access Code in the “Marketer / Loyalty program Store Code” field.

**RESTAURANT INTERFACE SPECIAL BEHAVIOR**

<p><b>PRICING DISPLAY</b></p> <p>Hide Prices <input type="checkbox"/></p> <p>Hide Option Prices <input type="checkbox"/></p>	<p><b>MARKETING</b></p> <p>Marketer/Loyalty Program Store Code <input type="text" value="780603"/></p> <p>Google Ad Words Account ID <input type="text"/></p> <p>Google Ad Words Label <input type="text"/></p>
<p><b>CUSTOMER COMMENTS</b></p> <p>Allow Menu Item Comments <input checked="" type="checkbox"/></p> <p>Allow Order Summary Comments <input checked="" type="checkbox"/></p> <p>Allow Delivery Instructions <input checked="" type="checkbox"/></p>	

In the “Location & Menus” Area, select “Coupons” and “Add New” to create each coupon offer that will be used in your SalesBuilder Campaign. Fill out the relevant coupon information, being sure to select “Loyalty offer” and enter the proper Salesbuilder Offer ID.

Coupon \$10 off \$20 or more

Coupon Name \$10 off \$20 or more

**Effective Date:**

From 01/10/2012 To 01/10/2099

**Good for:**

Delivery  Dine In  Takeout

**Coupon Qualifying:**

Buy [ ] Of:

- Beverages-Diet Dr. Pepper Large Drink
- Beverages-Diet Dr. Pepper Small Drink
- Beverages-Diet Pepsi 2 Liter Bottles
- Beverages-Diet Pepsi Large Drink

Buy \$ 20.00

**Coupon Promotions:**

Get up to [ ] Of:  same as qualifying items

- Beverages-Diet Dr. Pepper Large Drink
- Beverages-Diet Dr. Pepper Small Drink
- Beverages-Diet Pepsi 2 Liter Bottles
- Beverages-Diet Pepsi Large Drink

For % [ ] off up to \$ [ ]  Including items

For \$ [ ] off  Including options

For \$ [ ]

Get % [ ] off order

Get \$ 10.00 off order (limited to total of items ordered so order total will not be negative)

**Coupon Options:**

Auto-Apply

Coupon Code [ ]

Loyalty Program Offer Code 102

Priority Average

Not good with other offer

First Time Customer Only

Add if not on order

Maximum Times per Order 1

Make sure that this Offer Code matches the Offer ID in Salesbuilder!

**Restaurants:**

Available for All Restaurants

Available for Selected Restaurants

► indicates required field

Delete Cancel Save Save Copy Save and Return

If your online order provider does not integrate directly to Salesbuilder, no problem. VitalLink will record transactions from any client who is already enrolled in Salesbuilder according to the POS system.

# Using Your Loyalty Program

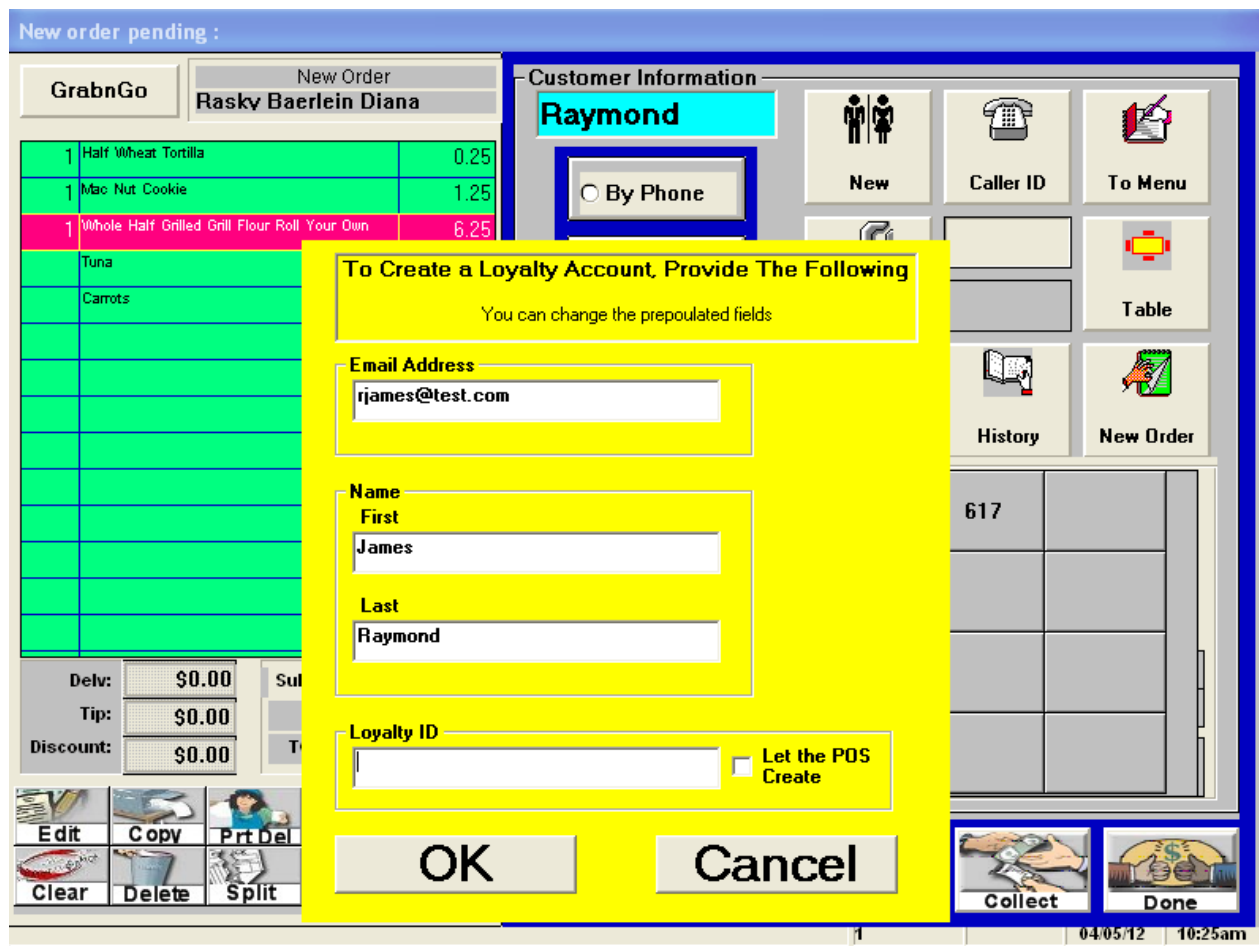
## Identify & Enroll Customers

When setting up your loyalty program, your goal is to get as many customers as possible to enroll! With the VitalLink system, we've got several ways to make this easy. Note: These instructions assume you have your enrollment setting at "Always", as recommended:

## From Customer Lookup

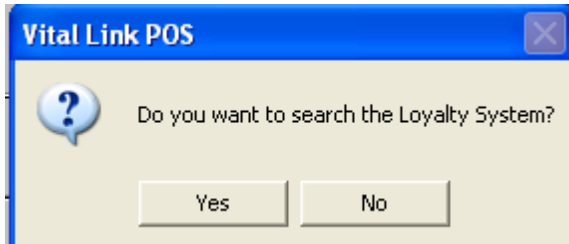
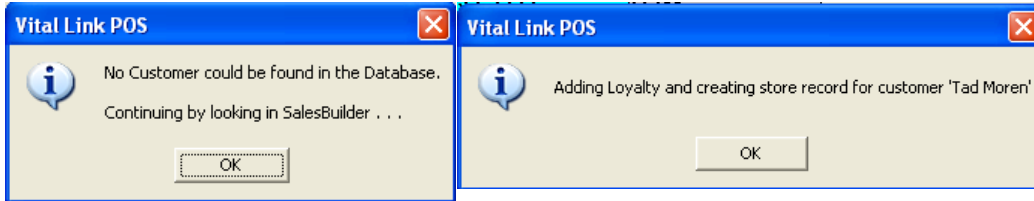
Look up a customer via phone, name or loyalty card ID.

**If the customer is already in the VitalLink database**, you'll be prompted to enroll this customer in the loyalty program. Enter the e-mail address, First and Last name, and swipe the loyalty ID, or check "Let the POS create" to use the phone # as the loyalty ID. (If there's no phone #, a random negative number will be assigned by the system). When you click OK, the customer's data will be sent to SalesBuilder and they will be sent their Welcome e-mail automatically!



If you search for a customer who is not in VitalLink, the system will also search SalesBuilder for customers

who may have registered at another store. If it finds a match, it will add this customer to the Vital Link database.



You may search for a customer by Name, for instance, and not find the results you want in the Vital Link search results. Press YES and you will have the option to search the SalesBuilder Loyalty system.

If SalesBuilder offers multiple matching results, you'll be able to select the customer to add to the Vital Link database.

Loyalty Selection			
Last Name	First Name	Street	E-Mail
Bones	Joey	1234 Main St ; 0	jbones@test.com
RABIROFF	ANN	2858 RAINIER PL; WEST LINN; 0	arabiroff@test.com
BOREN	BURL	3595 CEDAR OAK DR; WEST LINN; 0	bboren@test.com
Bauchman	Gary	no address; ; 0	gbauchman@gme
FABIANO	Jim	22 ORANGE ROAD; Hillsboro; 97124	fabiano@test.com
ZANBERMAY	CINDY	15 DEVONSHIRE RD; Hillsboro; 97068	cindy@test.com
Blass	Steve	no address; ; 63146	steveblass@letsq
Jacobs	Joe	no address; ; 63146	joejacobs@letsq
Banner	Bruce	no address; ; 63017	brucebanner@let
Bogart	Humphrey	1 Scenic Lane; Hollywood; 63017	humphreybogart@
kimberg	jordan	1043 Nooning Tree Drive; Chesterfield; 63017	jordan.kimberg@
BLESS	YVONNE	1514 6TH ST; WEST LINN; 97068	yb@test.com
BOYD	MICHAEL	2475 WILLAMETTE FALLS DR; WEST LINN; 97068	ttt@test.com
BELL	BEN	no address; ; 0	BEN@BRO.COM
STATE STREET BANK	LISA SHERRY	1 FEDERAL STREET; Boston; 2110	state@a.a

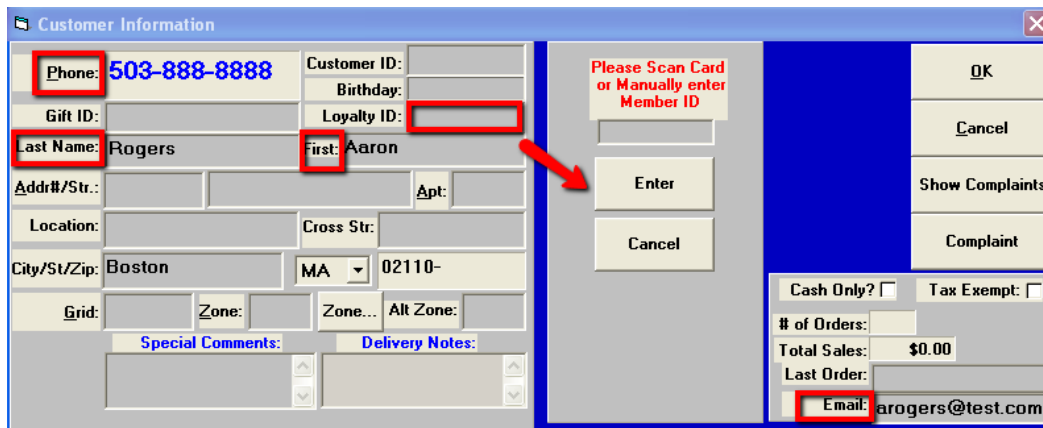
«
»

Please Select the Customer.
Close

If none of these customers are a match, press CLOSE and you will be able to enroll a new customer.

## Enrolling From the New Customer Screen

When you are adding a New customer to Vital Link, you can also enroll them in the loyalty program.



Customer Information

Phone: 503-888-8888 Customer ID: Birthday: Gift ID: Loyalty ID: Last Name: Rogers First: Aaron

Addr#/Str.: Apt: Location: Cross Str: City/St/Zip: Boston MA 02110- Grid: Zone: Zone... Alt Zone: Special Comments: Delivery Notes: Email: arogers@test.com

Please Scan Card or Manually enter Member ID

Enter Cancel

OK Cancel Show Complaints Complaint

Cash Only?  Tax Exempt:  # of Orders: Total Sales: \$0.00 Last Order: Email: arogers@test.com

Be sure to enter the customer's phone number, first and last name, and e-mail address at a minimum to enroll. Of course you can also enter their physical address. To

enroll, click on the "loyalty id" field. You'll see the center of the screen change to "Please Scan Card or Manually Enter ID". At this time you can scan a card and press Enter, or just press Enter to have the system assign a card number. Be sure to click OK In the upper right to save the customer record.

## Customer Self-Enroll

You can encourage customers to enroll in your loyalty program directly from your website. Within SalesBuilder, there is sample code you can use to embed a form on your website. (Navigate to Website / Sign up forms). Or, you can direct them to sign up using a direct link. Your link will vary based on the URL that is registered for your program. You can find out the URL for your program by navigating within Salesbuilder to Customers / Sign Up Page.

## Posting Transactions

The POS system will automatically update SalesBuilder with the transaction amount, date, time, offers redeemed, and Vital Link loyalty bucket point balance. This occurs when the order is closed.

You can view posted transactions in SalesBuilder by navigating to Transactions / View Transactions.

## Redeeming Offers

Once customers start receiving offers through the SalesBuilder program, they may present these coupons in your restaurant. Here's what a SalesBuilder offer will look like:



JESSICA, you earned a Reward!

We appreciate your business and hope that you enjoy this great reward.



## \$10 Gift Certificate

Granbury Restaurant Solutions

Use this for \$10 off your order.

Not valid with any other coupons, offers or specials.

Expires January 9th, 2012



\*6365021-7-190\*

Granbury Restaurant Solutions  
201 North Starnes Street  
Grapevine, TX 76051  
[\(800\) 750-3947](tel:8007503947)

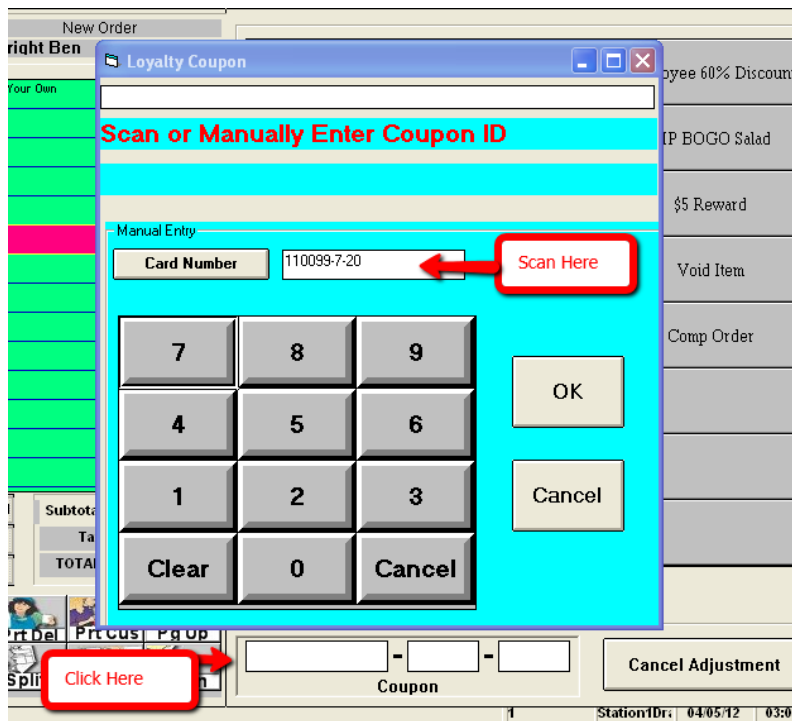
Internal Use Only - RWWRD  
6365021-7-190

Server ID:      Amount:

You'll notice that the barcode is made of 3 numbers. The first is the customer's loyalty ID, which may be their card number or phone number. The middle identifies the campaign this offer came from. The third number is the Offer ID which identifies the coupon in VitalLink.

## Scanning the Offer

In VitalLink, you can apply the offer to an order by entering or scanning the code.



On the "Coupon" screen, click on the coupon entry field at the bottom to bring up the Loyalty Coupon scan screen.

When the Loyalty Coupon form opens the cursor is at the top and is ready for your scanner. If manual entry is required, touch the edit box where shown and use the on screen or actual keyboard.

Press OK, and the coupon will be applied. VitalLink will let SalesBuilder know that this coupon has been redeemed.

Of course, any coupon restrictions you've set up inside Vital Link will still apply. If the coupon is not found, already used, expired, or does not match a Vital Link offer, you will get an error.

If you haven't already looked up the customer, don't worry - the coupon identifies the customer as well, so they will get points for this transaction.

## **Redeeming VitalLink Points**

When using Salesbuilder, customers will earn rewards based on the total dollars spent. Their rewards will be emailed to them in the form of an offer. If you choose to use the VitalLink internal points system instead of or in addition to the Salesbuilder rewards, a reward certificate will be printed on their receipt when they've reached the reward level. They can redeem this receipt coupon on their next visit.

## **Online Orders**

The screenshot shows a login and registration form. On the left, under 'Returning Customers', there is a prompt to enter a username and password. Below this are two input fields for 'Email' and 'Password'. There are two checkboxes: 'Remember Me' and 'Join Granbury Rewards, our Loyalty Program'. A 'Login' button is located below the checkboxes, and a 'Forgot Your Password?' link is at the bottom. On the right, under 'New Customers', there is a prompt to register if you are a new customer, with a 'REGISTER NOW!' link.

When your LetsGet online system is configured to integrate with SalesBuilder loyalty, customers will be prompted to join the program as they register or sign in. Once identified as a member, their transactions will be posted to SalesBuilder once completed in the POS system. However, offers are redeemed

immediately in SalesBuilder.

## **Manual Posting**

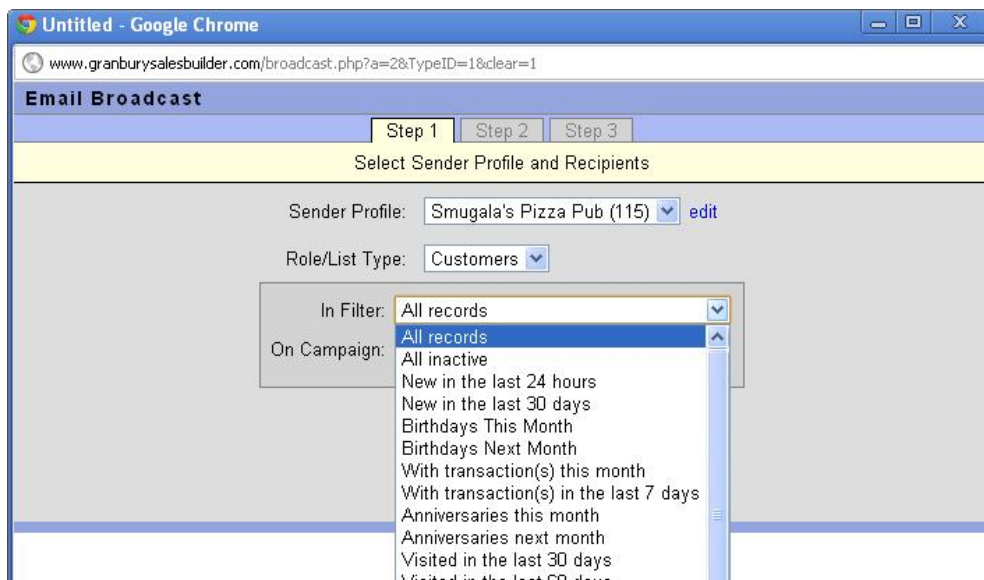
If you need to manually post a transaction or enroll a customer, or use the program at a non-POS integrated location, SalesBuilder gives you a web form to do so without having to log into the main SalesBuilder interface. Check with your implementation specialist for the proper URL, or from within SalesBuilder, go to Transactions / Post Transaction and you will see the URL at the top of the form.

## **Modifying Customer Records**

If you need to change a customer record, such as to issue a new card # or change their email, you can do so within the SalesBuilder program (from the Post Transaction Form or Edit Customer). The VitalLink POS system will be updated the next time the customer is selected.

## ***Sending a Broadcast***

Once you've set up SalesBuilder it's going to operate on auto-pilot for you, sending out emails on your behalf to customers on an ongoing basis. If you would like to supplement this with additional marketing, it's easy to send out additional emails, text messages, etc. to your customers.



From the SalesBuilder main menu, Select Broadcast, e-mail broadcast. Select the set of customers you wish to email.

On the next screen, you'll be able to type your message or create your HTML. If you'd like to attach an offer to your email, you'll need to insert the Customization

Tag "Landing Page" which will be a link to the page of offers. Then, select the offers from the list below.

**Tip:** [Here's a video](#) on how to send an e-mail broadcast from SalesBuilder

## ***Customer Surveys***

If you are using the Customer Survey feature of SalesBuilder, you can access the survey results through Transactions / View Surveys.

## ***More Assistance***

Need more help? Visit our customer support web portal at [www.granburyrs.com/support/](http://www.granburyrs.com/support/) to submit a support request, or call 800-750-3947.