- Vouchers (discounts)

Contact & Support

Website: { HYPERLINK "https://sociostacks.com/rewardcard.html" }

Documentation: [Link to online docs when available]

Support Email: [Your support email]

KEY FEATURES:

- Cards: Create & manage programs

- Rewards: Define prizes

- Staff: Manage employees

- Analytics: Track performance

- Members: View customers

Staff Quick Reference

ACCOUNT ACCESS: reward.sociostacks.com/en-us/staff
LOGIN: Magic link or verification code

DAILY WORKFLOW:

1. Search or scan customer

2. Choose action (points/stamps/redeem)

3. Complete transaction

4. Verify success

QUICK ACTIONS:

- Scan QR: Fastest method

- Search: Backup method

- Recent: For regulars

Customer Quick Reference

ACCOUNT ACCESS: reward.sociostacks.com/en-us/login
LOGIN: Magic link or verification code

EARNING REWARDS:

1. Add cards to My Cards

2. Show QR code when shopping

3. Earn points/stamps automatically

4. Redeem when ready

MY CARDS CONTAINS:

- Loyalty cards (points)

- Stamp cards (stamps)

- Membership tiers

3. Check business website for support info

Business Contact:

- Listed on loyalty card details
- Usually found on business website

Appendix

Glossary of Terms

Term	Definition
Partner	Business owner who creates loyalty programs
Member	Customer who collects loyalty cards and earns rewards
Staff	Employee who processes transactions
Club	Organizational unit (location/department)
Loyalty Card	Points-based reward program
Stamp Card	Digital punch card program
Tier	VIP membership level with benefits
Reward	Prize customers redeem with points
Voucher	Discount code for instant savings
QR Code	Scannable code for quick identification
Passwordless Login	Login via email link/code (no password)
Redemption	Exchanging points/stamps for rewards

Quick Reference Cards

Business Owner Quick Reference

ACCOUNT ACCESS: reward.sociostacks.com/en-us/partner

LOGIN: Magic link or verification code

MUST-DO SETUP:

1. Create at least one Club

2. Create Rewards before Cards

3. Add Staff members

4. Create Loyalty or Stamp Cards

Q: Do points expire?
A: Depends on the business. Check individual card terms.

Q: Can I use multiple vouchers together?
A: Only if vouchers are marked as "stackable." Check voucher details.

Q: What if a business closes?
A: Unfortunately, points/stamps with that business cannot be transferred.

Getting Help

For Business Owners

Support Resources:

- Platform documentation
- Email support
- Admin portal help section

Contact:

- Check platform owner contact information
- Email: [Available in your admin panel]

For Staff

Immediate Help:

1. Ask your manager
2. Check this guide
3. Reach out to business owner

Technical Issues:

- Report to manager
- Manager contacts platform support

For Customers

Support Options:

1. Contact the specific business directly
2. Use in-app help (if available)

Business Owner FAQ

Q: How do I upgrade from Bronze plan?
A: Visit { HYPERLINK "https://sociostacks.com/rewardcard.html" } for Pro plans.

Q: Can I have multiple locations?
A: Yes! Create one club per location and assign staff accordingly.

Q: How do I share my loyalty card?
A: Download the QR code or copy the direct link from your card settings.

Q: Can customers use cards at multiple locations?
A: Yes, if locations are in the same club or you configure cross-club redemption.

Q: How often are analytics updated?
A: Real-time for transactions, aggregated daily for reports.

Staff FAQ

Q: What if customer forgot their phone?
A: Use manual entry with their email address or phone number.

Q: Can I award points without purchase?
A: Only with manager approval. Never override rules without authorization.

Q: What if I made a mistake?
A: Contact your manager immediately. They can void transactions if needed.

Q: How do I know which club I'm assigned to?
A: Check your account settings or ask your manager.

Q: Can I see all customers or just mine?
A: You see all customers who use your club's cards.

Customer FAQ

Q: Do I need an app?
A: No! Works in any web browser. You can install to home screen for app-like experience.

Q: Are my points safe if I lose my phone?
A: Yes! Points are tied to your email account, not your device.

Q: Can I transfer points between cards?
A: No, each business's program is independent.

Check:

1. Did success message appear?
2. Is internet connected?
3. Check transaction history
4. Contact staff/support

Issue: Balance Incorrect

Solutions:

1. View complete transaction history
2. Count all transactions
3. Contact business if discrepancy
4. Provide transaction dates/times

Account Issues

Issue: Can't Find My Card

Solutions:

1. Check "My Cards" section
2. Verify you added/used it
3. Search homepage if public
4. Check email for confirmation

Issue: Card Disappeared

Possible Causes:

- Card expired
- Business deactivated card
- You removed it

Solutions:

- Check expiration dates
- Contact business
- Re-add if available

FAQ by Role

Common Issues

QR Code Problems

Issue: QR Code Won't Scan

Solutions:

1. ☑Increase screen brightness
2. ☑Clean camera lens
3. ☑Hold phone steady
4. ☑Ensure good lighting
5. ☑Remove screen protector if damaged
6. ☑Try manual entry instead

Issue: Wrong QR Code Displayed

Solutions:

1. Close and reopen correct card
2. Verify which card you're using
3. Check for multiple accounts

Login Issues

Issue: Verification Code Not Received

Solutions:

1. ☑Check spam/junk folder
2. ☑Wait 1-2 minutes
3. ☑Request new code after 60 seconds
4. ☑Verify email address spelling

Issue: Code Expired

Solutions:

1. Codes expire after 10 minutes
2. Request fresh code
3. Complete login promptly

Transaction Issues

Issue: Points/Stamps Not Added

- Based on locale settings

Mobile Optimization

All Interfaces Are Mobile-First

Optimized for:

- ✔Smartphones (primary)
- ✔Tablets
- ✔Desktop browsers

Key Features:

- Touch-friendly buttons
- Responsive layouts
- Fast loading times
- Offline capabilities

Best Mobile Experience

Staff:

- Use tablet at point of sale
- Keep device charged
- Clean camera lens regularly

Customers:

- Install as app to home screen
- Keep QR codes accessible
- Take screenshots for offline

Business Owners:

- Access from anywhere
- Manage on-the-go
- View analytics mobile-friendly

Troubleshooting & FAQ

Where to Find:

- Header menu (customers)
- Account settings (all users)
- Sidebar menu (staff/partners)

Dark Mode

Enabling Dark Mode

All User Types:

1. Go to Settings/Preferences
2. Find "Theme" or "Appearance"
3. Select "Dark" mode
4. Interface switches to dark theme

Benefits:

- Easier on eyes in low light
- Reduces screen glare
- Saves battery on mobile

Localization Features

Time Zones

- All times displayed in your selected timezone
- Transactions show accurate local time
- Set during registration or in settings

Currency

- Prices shown in local currency format
- Set based on business location
- Converted automatically

Date Formats

- Dates shown in regional format
- MM/DD/YYYY or DD/MM/YYYY

Why Passwordless?

- **More Secure:** No passwords to forget or steal
- **Faster:** Quick access via email
- **Convenient:** No password resets needed

Two Methods

Magic Links:

1. Enter email
2. Receive link in email
3. Click to login instantly

Verification Codes:

1. Enter email
2. Receive 6-digit code
3. Enter code to login

Security Best Practices

For All Users:

- ☑Use secure email account
- ☑Don't share login links/codes
- ☑Verify sender before clicking
- ☑Report suspicious emails

Multi-Language Support

Available Languages

☐ **Tooltip:** The application is fully translatable. Check available languages in settings.

Changing Language

All User Types:

1. Click language selector
2. Choose your preferred language
3. Interface updates immediately

- ☑Collect from multiple businesses
- ☑Track all in one place
- ☑No limits on how many

Combine Benefits:

- ☑Use vouchers for instant savings
- ☑Still earn points on purchase
- ☑Double benefits

Keep Your Account Secure

Email Security:

- ☑Use secure password for email
- ☑Don't share login codes
- ☑Verify sender before clicking links

QR Code Safety:

- ☑Only show to trusted staff
- ☑Don't share codes publicly
- ☑Screenshot for offline backup

Stay Engaged

Check Regularly:

- ☑Weekly: View your progress
- ☑Monthly: Check for new vouchers
- ☑Before visits: Plan redemptions

Explore New Programs:

- ☑Browse homepage for new cards
- ☑Scan QR codes you see
- ☑Try different businesses

Common Features Across All Roles

Passwordless Login (All Users)

- Look for install icon in address bar
- Click to install

What Works Offline

Available Without Internet:

- ☑View your loyalty cards
- ☑Show QR codes
- ☑Check stamp card progress
- ☑View saved vouchers
- ☑See your balances (cached)

Requires Internet:

- ✖Earning new points/stamps
- ✖Real-time balance updates
- ✖Claiming rewards
- ✖Adding new cards

Offline Indicator:

☐ You're offline. Showing cached cards.

☐ **Tip:** Visit your cards while connected at least once. This caches your QR codes for offline use.

3.14 Customer Best Practices

Maximize Your Rewards

Always Show Your Card:

- ☑Even small purchases add up
- ☑Build toward rewards consistently

Check Before Visiting:

- ☑Know available rewards
- ☑See how close you are
- ☑Plan purchases to maximize value

Use All Your Cards:

Tooltip: Your progress is ALWAYS saved. Removing only hides the card from view.

Step 1: Open the card
Step 2: Click **"Remove from My Cards"**
Step 3: Confirm removal
Step 4: Card removed from My Cards

What's Preserved:

- ☑Points balance
- ☑Stamp progress
- ☑Transaction history
- ☑Rewards earned

Re-Adding a Card

Step 1: Find the card (homepage or link)
Step 2: Click **"Add to My Cards"**
Step 3: Previous progress restored instantly
Step 4: Continue where you left off

3.13 Using Cards Offline

 Tooltip: Your loyalty cards work even without internet! QR codes are saved to your device.

Installing the App

For Best Offline Experience:

iPhone/iPad:

1. Tap Share button
2. Select "Add to Home Screen"
3. Confirm

Android:

1. Tap browser menu
2. Select "Install app"
3. Confirm

Desktop:

- Complete purchase
- Redemption recorded

Voucher Types

Type	What You Get	Example
Percentage Off	X% discount	20% off order
Fixed Amount	$X off	$10 off $50+
Free Product	Specific item free	Free coffee
Bonus Points	Loyalty points	+500 points

3.11 Viewing Your History

Transaction History

Access:

1. Open any card
2. Scroll to "History" section
3. View all activity

What You'll See:

- Every point/stamp earned
- When and where transactions occurred
- All rewards redeemed
- Current balances

Redemption History

For Each Redemption:

- Date and time
- Reward claimed
- Points/stamps used
- Location (if multi-location)

3.12 Removing & Re-Adding Cards

Removing a Card

Step 3: Add to My Cards

- Click **"Add to My Cards"**
- Confirmation appears
- Voucher now in your collection

Claiming via QR Code (Batch Vouchers)

Step 1: Scan QR Code

- Use phone camera
- Scan promotional QR code

Step 2: View Voucher

- See discount details
- Review requirements

Step 3: Log In (if needed)

- Authenticate if not logged in

Step 4: Claim Your Voucher

- Click **"Claim My Voucher"**
- ☐ Confetti celebration!
- Voucher added to My Cards

Redeeming Vouchers In-Store

Step 1: Open Voucher

- My Cards → Vouchers → Select voucher

Step 2: Show QR Code

- Tap **"Show QR Code to Staff"**
- Staff scans it

Step 3: Discount Applied

- System validates voucher
- Calculates discount
- Shows final amount

Step 4: Pay Reduced Amount

Step 1: Open completed stamp card
Step 2: Tap **"Collect Reward"**
Step 3: Visit business
Step 4: Show reward QR code
Step 5: Staff confirms and provides reward
Step 6: Card resets automatically

After Redemption

What Happens:

- ☑Points/stamps deducted
- ☑Redemption appears in history
- ☑You receive physical reward
- ☑Balance updates

3.10 Adding & Using Vouchers

☐ **Tooltip:** Vouchers are discount codes that provide instant savings at checkout.

Finding Vouchers

Where to Look:

- Homepage featured section
- My Cards vouchers section
- Business websites
- Email newsletters
- Social media posts
- In-store QR codes

Adding Public Vouchers

Step 1: View Voucher Details

- Click on any public voucher

Step 2: Review Information

- Discount value
- Minimum purchase
- Expiration date
- Any restrictions

3.9 Redeeming Rewards

☐ **Tooltip:** When you have enough points or complete a stamp card, exchange them for rewards!

Viewing Available Rewards

On Each Loyalty Card:

- ☑Available rewards
- ☑Points required
- ☑Your current balance
- ☑Which you can afford (highlighted)

In-Store Redemption Process

Step 1: Visit the Business

- Go to participating location

Step 2: Tell Staff

- "I want to redeem [reward name]"

Step 3: Show QR Code

- Display loyalty card QR code
- Or tell them the code

Step 4: Staff Processes

- They scan/enter code
- Confirm discount/reward
- Points deducted immediately

Step 5: Receive Reward

- Get your free item
- Or receive discount on purchase

Stamp Card Redemption

When Card is Complete:

Tier Benefits

Points Multiplier:

Tier	Multiplier	Effect
Bronze	1.0×	Standard earning
Silver	1.25×	25% bonus points
Gold	1.5×	50% bonus points
Platinum	2.0×	Double points

Example:

Purchase: $100
Your Tier: Gold (1.5× multiplier)

Without tier: 100 points
With Gold tier: 150 points (+50 bonus)

Where You See Tiers

My Cards Page:

- Dedicated tier section
- Shows all your earned tiers

Card Detail Page:

- Relevant tier for that business
- Current multiplier displayed

Card Badges:

- Cards with multipliers show: "□ 2.0×"
- Quick visual indicator

Tier Card Information

Each tier card displays:

- **Tier name and icon** (e.g., □ Gold Member)
- **Points multiplier** (if greater than 1×)
- **Progress bar** to next tier
- **Associated cards** that benefit

Tooltip: Some businesses offer membership tiers that reward loyalty with bonus benefits. Think airline frequent flyer status!

How Tiers Work

Based on Lifetime Points:

- Total points you've ever earned
- Never decreases (even after spending)
- Rewards your loyalty history

Example:

You earned: 10,000 lifetime points

You spent: 7,000 points

Current balance: 3,000 points

Tier qualification: Based on 10,000 (lifetime)

One Tier Per Business

 Tooltip: If a business has multiple loyalty cards, your tier applies to ALL of them.

Example:

Coffee Shop has:

- Classic Card

- Premium Card

- Student Card

You reach Gold tier → All three cards show Gold benefits

When Tiers Appear

You'll see tier information when:

- ☑You've earned points with that business
- ☑Business has configured tiers
- ☑You're viewing their cards

You won't see tiers if:

- ✗You have zero lifetime points
- ✗Business hasn't set up tiers

- They scan your code
- Stamp added instantly

Step 4: View Progress

- See updated stamp count
- Check how many more needed

Progress Display

Visual Grid:

☕☕☕○○
○○○○○

- Filled stamps (☕ = Collected
- Empty stamps (○) = Still needed

Progress Bar:

Progress: 3 of 10 stamps (30%)

[▐▓░░░░░░░░░]

When You Complete a Card

Automatic Points Reward:

- Points credited immediately
- Notification sent
- Card resets to 0
- Start collecting again

Physical Reward:

- "Collect Reward" button appears
- Visit business
- Show reward QR code
- Staff gives you reward
- Card resets

3.8 Understanding Membership Tiers

How to Know:

- Cards with multipliers show badge: "□ 2.0×"
- View your tier status in My Cards

Checking Your Balance

Anytime:

1. Click **My Cards**
2. Select loyalty card
3. Your current points appear on card

3.7 Collecting Stamps (Stamp Cards)

□ **Tooltip:** Stamp cards are like digital punch cards. Collect a specific number of stamps to earn your reward.

How Stamp Cards Work

The Flow:

1. Make qualifying purchase
2. Show your QR code to staff
3. They scan and add a stamp
4. Watch progress toward reward
5. Complete card to earn reward
6. Card resets, start again

The Collection Process

Step 1: Make Qualifying Purchase

- Buy eligible product/service
- Meet minimum amount (if required)

Step 2: Show QR Code

- Open stamp card in My Cards
- Display QR code to staff

Step 3: Staff Adds Stamp

- Staff scans it

Step 5: Staff Enters Purchase Amount

- They type your order total
- System calculates points

Step 6: Points Added

- Balance updates immediately
- You see new total

Your QR Code

☐ **Tooltip:** Each loyalty card has a unique QR code that identifies you. Keep it handy when visiting businesses.

Access Your QR Code:

1. Open loyalty card from My Cards
2. Look for QR code section
3. Display to staff

Pro Tip: Screenshot frequently used codes for quick access

Point Calculation Examples

Business Rule	Purchase	Points Earned
1 point per $1	$25.00	25 points
1 point per $2	$25.00	12 points
5 points per $10	$25.00	12 points

Welcome Bonuses

☐ **Tooltip:** Some cards offer bonus points on your first purchase. This happens automatically!

Tier Multipliers

If you've earned a higher tier:

Example: Gold Member (1.5× multiplier)

Purchase: $50

Base points: 50 pts

Gold bonus: +25 pts (50% extra)

Step 3: Click **"Add to My Cards"**
Step 4: Card saved for future use

Scanning QR Codes

Where to Find QR Codes:

- Counter displays
- Window stickers
- Menus and receipts
- Business cards
- Promotional materials

How to Scan:

Step 1: Open phone's camera app
Step 2: Point at business's QR code
Step 3: Tap the link that appears
Step 4: Loyalty card opens
Step 5: Make purchase to add automatically

3.6 Earning Points (Loyalty Cards)

☐ **Tooltip:** You earn points by making purchases at participating businesses. The more you spend, the more you earn.

The Process

Step 1: Make a Purchase

- Shop at participating business

Step 2: Tell Staff

- "I have a loyalty card"

Step 3: Open Your Loyalty Card

- My Cards → Select card

Step 4: Show Your QR Code

- Display to staff

4. **Loyalty Cards** section
5. **Membership Tiers** (if you've earned status)
6. **Stamp Cards** section
7. **Vouchers** section

Quick Stats Display

Three metric cards:

Stat	What It Shows
Total Cards	Number of loyalty + stamp cards
Total Points	Sum across all loyalty cards
Stamps Collected	Sum across all stamp cards

Quick Actions

Action	Purpose
Account Settings	Update email, password, preferences
Request Points	Create link to receive points
Enter Code	Redeem a code you received

3.5 Collecting Your First Card

How Cards Get Added to My Cards

Method 1: Automatically (Most Common)

☐ **Tooltip:** When you use a program for the first time, the card is added automatically to My Cards.

Triggers automatic addition:

- Earn points on loyalty card
- Get your first stamp
- Redeem a code
- Receive a points transfer

Method 2: Manually (Bookmark for Later)

Step 1: Browse available cards on homepage
Step 2: Click on card that interests you

1. Enter your email address
2. Click **"Send me a login code"**
3. Check email for 6-digit code
4. Enter code on verification page
5. You're logged in

Option 2: Magic Link

1. Enter your email
2. Click **"Send me a login link"**
3. Click link in email
4. Automatically logged in

☐ **Tooltip:** No password needed! Verification codes keep your account secure.

3.3 Customer Dashboard Navigation

Header Navigation (Simple)

Menu Item	Purpose
Home	Browse available loyalty programs
My Cards	See all your cards in one place
Profile Menu (top right)	Account, settings, logout

Profile Menu Items

- My Account
- Language & Theme settings
- Logout

3.4 My Cards Overview

☐ **Tooltip:** My Cards is your personal collection of all loyalty programs. It shows only the cards you've added or used.

Page Layout (Top to Bottom)

1. **Welcome header** with your name
2. **Quick stats** showing your totals
3. **Quick actions** for common tasks

- Start using your first program

Process:

1. Enter your email address
2. Verify with a code
3. You're set up!

Account Creation Flow

Step 1: First Interaction

- Scan QR code or click card link

Step 2: Email Entry

- Enter your email address
- Click "Continue"

Step 3: Verification

- Check email for 6-digit code
- Enter code
- Auto-submits when complete

Step 4: Profile Setup (Optional)

- Add your name
- Add phone number
- Set preferences

☑**Success:** You're now ready to start collecting cards and earning rewards!

3.2 Customer Login

Signing In

Step 1: Go to Login Page

URL: reward.sociostacks.com/en-us/login

Step 2: Passwordless Login

Option 1: Login Code

- Add points when system responds
- Report to manager

Problem: Internet connection lost
Actions:

- Note customers needing points
- Add stamps/points when connection returns
- Communicate delays clearly
- Get contact info if needed

When to Contact Manager

Always escalate:

- ☑Customer disputes you can't resolve
- ☑System errors persisting
- ☑Override eligibility requests
- ☑Accusations of fraud
- ☑Technical issues continuing
- ☑Angry customers you can't calm

User Role 3: Customer Dashboard

Overview

As a Customer (Member), you collect loyalty cards and stamp cards from businesses, earn points and stamps with purchases, and redeem rewards.

3.1 Creating Your Account

☐ **Tooltip:** You don't need to register in advance. Your account is created automatically when you first use a loyalty program.

Automatic Account Creation

Your account is created when you:

- Scan a QR code at a business
- Click a link to a loyalty card

2.12 Staff Troubleshooting

QR Code Issues

Problem: Code won't scan
Solutions:

1. Increase screen brightness
2. Hold phone steady
3. Clean camera lens
4. Close and reopen customer's code
5. Use manual entry

Problem: Wrong customer appears
Solution: Close form, ask correct customer to show code

Problem: Duplicate scan
Solution: Wait for success message, don't rescan immediately

Transaction Issues

Problem: Points not added
Check:

- Did success message appear?
- Is customer online?
- Check transaction history
- Try again if failed

Problem: Wrong card updated
Action:

- Note customer name and time
- Contact manager immediately
- Manager can void transaction

System Issues

Problem: System running slow
Actions:

- Be patient
- Complete sale first

During Rush Hours:

- ✅Have scanner ready before customer arrives
- ✅Scan while preparing order
- ✅Confirm verbally and move on
- ✅Use Recent Customers for regulars

During Slow Times:

- ✅Take time to chat with customers
- ✅Mention their progress
- ✅Build relationships
- ✅Explain program benefits

Accuracy

Always Verify:

- ✅Customer identity
- ✅Correct card/program
- ✅Eligibility status
- ✅Purchase amount

Never:

- ✖Scan without customer present
- ✖Add points for friends/family
- ✖Override eligibility without manager approval
- ✖Scan your own code

Customer Communication

Before Scanning: "I'll add [points/stamp] to your card right now."

During Transaction: "Just one moment..." (if taking longer)

After Successful Transaction: "Perfect! You're at 6 of 10 stamps now."

If Not Eligible: "You've reached your daily limit, but you can earn more tomorrow!"

Device Maintenance

- ✅Keep device charged
- ✅Clean camera lens regularly
- ✅Adjust screen brightness
- ✅Have backup manual process ready

Section	What You See
Loyalty Cards	Current balances, points earned/redeemed
Stamp Cards	Current progress, completion history
Vouchers	Claimed and used vouchers
Transaction Timeline	All activity with dates/times

Transaction Details Include

For each transaction:

- ☑Date and time
- ☑Action taken (points earned, stamp added, reward redeemed)
- ☑Amounts involved
- ☑Which staff member processed it
- ☑Before/after balances
- ☑Internal notes (if any)

Common Use Cases

Customer Says:
"I should have 8 stamps but only see 7."

You Do:

1. Open stamp card history
2. Count transactions
3. Verify current count
4. Explain discrepancy or add missing stamp

Customer Says:
"Did my points from yesterday get added?"

You Do:

1. Open loyalty card history
2. Look at recent transactions
3. Find yesterday's date
4. Confirm points added

2.11 Staff Best Practices

Speed & Efficiency

- Email address (most accurate)
- Phone number
- Full name
- Membership ID

Step 3: Select Customer

- Click on correct customer from results
- View their profile

Step 4: Choose Action

From customer profile:

- **Add Points** → Award loyalty points
- **Add Stamps** → Add stamp to card
- **Redeem Reward** → Process redemption

Step 5: Complete Transaction

- Enter purchase amount (if needed)
- Confirm action
- Success message appears

☐ **Tooltip:** Manual entry takes 30-60 seconds vs 5 seconds for QR scanning. It's a reliable backup method.

2.10 Viewing Customer History

☐ **Tooltip:** Access complete transaction history to answer questions and verify activity.

Access Customer History

Step 1: Find Customer

- Search by name/email or scan QR

Step 2: View Profile

- Click customer name

Step 3: Navigate to History Sections

Available Information:

Common Voucher Issues

"Minimum Purchase Not Met"

- Order below required amount
- Customer can add items or save voucher

"Daily Limit Reached"

- Customer used maximum today
- Invite them back tomorrow

"Voucher Expired"

- Validity period ended
- Cannot be used

"Maximum Uses Exceeded"

- Customer used all allowed times
- Suggest alternative vouchers

2.9 Manual Entry (Without QR Code)

☐ **Tooltip:** When QR scanning isn't possible, use manual entry to ensure customers never miss earning points/stamps.

When to Use Manual Entry

- Customer forgot phone
- Phone battery died
- QR code won't scan
- Technical issues

Step-by-Step: Manual Entry

Step 1: Navigate to Members

Sidebar → Dashboard → Search

Step 2: Search for Customer

Ask for:

- Customer tells you the code
- Select from dropdown
- Or type code directly

Step 4: Review Voucher Details

System displays:

- Voucher preview card
- Discount type and value
- Eligibility status
- Any warnings

Step 5: Enter Purchase Amount

- Type order total
- System calculates discount instantly

Example:

Purchase Amount: $50.00

Voucher: SUMMER20 (20% off)

Discount: $10.00

Final Amount: $40.00

Step 6: Add Notes (Optional)

- Order number
- Receipt number
- Special circumstances

Step 7: Complete Redemption

- Verify discount with customer
- Click **"Redeem Voucher"**
- Apply discount to purchase
- Process payment

Voucher Eligibility Indicators

Indicator	Meaning
✓ Green checkmark	Requirement met
☐☐ Yellow warning	Issue needs attention
✗ Red error	Cannot proceed

- Give the item to customer
- Thank them for their loyalty

Stamp Card Redemption

When Card is Complete:

Step 1: Customer shows reward QR code
Step 2: Scan the reward code
Step 3: System shows reward details
Step 4: Verify reward
Step 5: Give physical item
Step 6: Confirm in system
Step 7: Card resets to 0 stamps

☐ **Tooltip:** Reward QR code is different from collection QR code. Always verify you're scanning the reward code.

2.8 Redeeming Vouchers

☐ **Tooltip:** Vouchers are discount codes customers can use at checkout. You'll scan their voucher QR or enter the code manually.

Step-by-Step: Redeem Voucher

Step 1: Identify Customer

- Scan loyalty QR or search by email

Step 2: Navigate to Voucher Redemption

Select customer → Redeem Voucher

Step 3: Get Voucher Code

Option A: Scan Voucher QR

- Customer shows voucher QR code
- Click scanner button
- Scan the code
- Voucher auto-selects

Option B: Manual Entry

2.7 Processing Redemptions

☐ **Tooltip:** When customers have earned enough points or completed their stamp card, they can redeem rewards.

The Redemption Flow

1. Customer requests specific reward
2. Scan their QR code
3. Verify sufficient points/stamps
4. Select the reward
5. Confirm redemption
6. Provide the reward

Step-by-Step: Process Redemption

Step 1: Scan Customer QR Code

Step 2: Select "Redeem Reward"

Step 3: View Available Rewards You'll see:

- Customer's current balance
- Available rewards
- Points required for each
- Which rewards they can afford

Step 4: Verify Customer Request

- Ask which reward they want
- Ensure they have enough points

Step 5: Select Reward

- Tap the reward they're claiming
- System shows confirmation screen

Step 6: Confirm Redemption

- Tap **"Confirm Redemption"**
- Points deducted immediately
- Transaction logged

Step 7: Provide Physical Reward

Step-by-Step: Add Stamp

Step 1: Find Customer

- Search or scan QR code

Step 2: Select "Add Stamps"

Step 3: Verify Eligibility

System checks:

- ☑Minimum purchase met (if required)
- ☑Daily limit not exceeded
- ☑Program is active
- ☑Card not already complete

Step 4: Confirm Stamp Addition

- System shows current progress
- Tap **"Add Stamp"**
- Customer sees progress update

Step 5: Check Completion

If this completes their card:

- ☐ Celebration message appears
- Reward becomes available
- Card resets for next collection

Stamp Card Eligibility

Minimum Purchase:

Required: $5.00

Customer purchase: $7.00 ☑

Customer purchase: $3.00 ✕

Daily Limit:

Limit: 3 stamps per day

Customer's stamps today: 2 ☑(can add 1 more)

Customer's stamps today: 3 ✕(limit reached)

Tier bonus: +50 pts (1.5× multiplier)

Total: 150 pts

Step 6: Confirm Transaction

- Tap **"Award Points"**
- Success message appears
- Customer's balance updates immediately

Point Calculation Examples

Card Rule	Purchase	Points Earned
1 point per $1	$25.00	25 points
1 point per $2	$25.00	12 points
10 points per $1	$25.00	250 points

Welcome Bonus

⬜ **Tooltip:** If the card offers a welcome bonus, first-time customers receive extra points automatically. Just enter the purchase amount normally.

Tier Multipliers

How It Works:

- Customer's tier automatically multiplies points
- You don't calculate manually
- System shows breakdown

Example:

Customer: Gold Member (1.5× multiplier)

Purchase: $100

Base points: 100 pts

Gold bonus: +50 pts

Total awarded: 150 pts

2.6 Adding Stamps (Stamp Cards)

⬜ **Tooltip:** Stamp cards are digital punch cards. Add a stamp each time the customer makes a qualifying purchase.

- ☑Try manual entry as backup

Wrong Card Appears:

- Customer may have multiple cards
- Ensure they're showing the correct one

Not Authorized:

- Card belongs to different club
- Only your club's cards will work

2.5 Awarding Points (Loyalty Cards)

□ **Tooltip:** After scanning a customer's QR code, you'll award points based on their purchase amount. The system calculates points automatically.

Step-by-Step: Award Points

Step 1: Scan Customer QR Code

- Use either scanning method

Step 2: View Customer Details You'll see:

- Customer name
- Current point balance
- Membership tier (if applicable)
- Available actions

Step 3: Select "Award Points"

Step 4: Enter Purchase Amount

- Type the order total (e.g., $25.00)
- System shows points they'll earn
- Point calculation appears in real-time

Step 5: Review Calculation

If customer has a membership tier:

Base points: 100 pts

2.4 Scanning QR Codes

How QR Scanning Works

What Customers Show:

- Loyalty card QR code (from My Cards)
- Phone screenshot of code
- QR code saved in photos

Scanning Methods

Option 1: Built-in Scanner (Recommended)

Step 1: Log in to staff dashboard
Step 2: Tap **"Scan QR Code"**
Step 3: Point camera at customer's code
Step 4: System reads code automatically

Option 2: Phone Camera App (Faster)

Step 1: Open phone's standard camera app
Step 2: Point at customer's QR code
Step 3: Tap the link that appears
Step 4: Opens staff dashboard with customer loaded

☐ **Tooltip:** The standard camera app is often faster and more reliable than built-in scanners.

After Scanning

You'll see:

- ☑Customer's name
- ☑Current points balance
- ☑Which loyalty card they're using
- ☑Options to award points or process redemptions

Troubleshooting QR Scans

Code Won't Scan:

- ☑Ensure good lighting
- ☑Ask customer to increase screen brightness
- ☑Make sure entire code is visible
- ☑Clean your camera lens

Tooltip: The staff portal is optimized for mobile devices like phones and tablets at the point of sale.

Menu Item	Purpose
Dashboard	Search customers, recent activity
Scan QR	Quick QR code scanner
Recent Customers	Previously served customers
Redemption Codes	View/manage codes
Stamps	Stamp card management
Account	Your settings and logout

Bottom Account Menu

- Account Settings
- Language selector
- Logout

2.3 Your Daily Workflow

The Search-First Approach

 Tooltip: Instead of navigating through menus, search for the customer first, then choose your action.

Three Ways to Find a Customer:

1. **Search Bar** (Dashboard)
   - Enter customer name or email
   - Select from results
   - Choose action
2. **Scan QR Code**
   - Click "Scan QR" in sidebar
   - Point camera at customer's code
   - Customer profile loads
   - Choose action
3. **Recent Customers**
   - Click "Recent Customers"
   - Find customer in your history
   - Select to continue

User Role 2: Staff Dashboard

Overview

As a Staff member, you process customer transactions at the point of sale. Your main tasks are scanning QR codes, awarding points/stamps, and processing redemptions.

2.1 Staff Login

Accessing the Staff Portal

Step 1: Navigate to Staff Portal

URL: reward.sociostacks.com/en-us/staff

Step 2: Passwordless Login

☐ **Tooltip:** Staff uses the same secure passwordless login as business owners and customers.

Option 1: Login Code

1. Enter your work email address
2. Click **"Send me a login code"**
3. Check email for 6-digit code
4. Enter code on verification page
5. You're logged in

Option 2: Magic Link (if available)

1. Enter your work email
2. Click **"Send me a login link"**
3. Click link in email
4. Automatically logged in

2.2 Staff Dashboard Navigation

Mobile-First Sidebar

Share via:

- Email campaigns
- Social media posts
- Website buttons
- SMS messages

Homepage Display

☐ **Tooltip:** Enable "Visible on Homepage" so customers can discover your cards on the main site.

Requirements:

- Must be enabled by administrator
- Toggle in card settings

1.13 Best Practices for Business Owners

Card Design

☑Use your brand colors ☑Keep logos simple and recognizable ☑Ensure text is readable ☑ Test on mobile devices

Point Values

☑Make rewards achievable ☑Balance effort and reward ☑Offer multiple reward tiers ☑Adjust based on analytics

Staff Training

☑Train staff on QR scanning ☑Explain how to award points/stamps ☑Practice redemption process ☑Review troubleshooting

Promotion

☑Display QR codes prominently ☑Remind customers to scan ☑Promote on social media ☑ Send email announcements

Regular Monitoring

☑Check analytics weekly ☑Adjust rewards based on data ☑Update seasonal programs ☑ Respond to member feedback

- Completion rate
- Average time to completion
- Stamps awarded

Voucher Analytics:

- Views
- Redemptions
- Discount given
- Conversion rate
- Member reach

Export Data

- Download CSV reports
- Filter by date range
- Segment by club/location
- Export member lists

1.12 Sharing & Promoting Your Cards

Download QR Codes

For Loyalty Cards:

Cards → Select Card → Download QR Code

For Stamp Cards:

Stamp Cards → Select Card → Download QR Code

Display Options:

- Print on receipts
- Counter displays
- Window stickers
- Table tents
- Promotional materials

Share Direct Links

Each card has a unique URL:

https://reward.sociostacks.com/en-us/card/YOUR-CARD-ID

Section	What You See
Analytics	Customer lifetime value, visit frequency

1.11 Analytics Dashboard

☐ **Tooltip:** Analytics help you understand which programs are working and why.

Main Analytics Overview

Navigate to Dashboard:

Sidebar → Dashboard (or) Analytics

Key Metrics Displayed

Metric	Description
Card Views	How many times your cards were viewed
New Members	Recently added customers
Points Activity	Total points earned/redeemed
Redemption Rate	% of earned points redeemed

Time Period Selection

- Today
- Last 7 days
- Last 30 days
- All time
- Custom date range

Detailed Analytics

Loyalty Card Analytics:

- Total enrollments
- Active vs inactive members
- Points issued vs redeemed
- Redemption patterns
- Most popular rewards

Stamp Card Analytics:

- Total enrollments
- Active enrollments

- ☑Award points to loyalty cards
- ☑Add stamps to stamp cards
- ☑Process reward redemptions
- ☑Redeem vouchers
- ☑View customer transaction history
- ✕Create cards or rewards
- ✕Manage other staff
- ✕View full analytics

1.10 Viewing Members (Customers)

Access Member List

Step 1: Navigate to Members

Sidebar → Members

Step 2: Search & Filter

- **Search Bar:** Find by name, email, phone
- **Filter by Club:** View members by location
- **Sort Options:** Name, join date, activity

Step 3: View Member Profile

- Click on any member name
- See their:
    - Contact information
    - Loyalty cards and balances
    - Stamp card progress
    - Vouchers
    - Transaction history
    - Membership tier status

Member Information Available

Section	What You See
Profile	Name, email, join date, tier
Loyalty Cards	Current point balances
Stamp Cards	Current stamp progress
Vouchers	Claimed and redeemed vouchers
Transaction History	All points/stamps earned and redeemed

2. Share via email/SMS/social

☐ **Tooltip:** Members scan QR or click URL to claim their unique voucher from the batch.

1.9 Managing Staff

☐ **Tooltip:** Staff members are employees who scan customer QR codes, award points/stamps, and process redemptions.

Step-by-Step: Add Staff Member

Step 1: Navigate to Staff

Sidebar → Staff → Create Staff

Step 2: Enter Staff Information

Field	Description	Example
Name*	Staff member's name	"John Smith"
Email*	Their work email	{ HYPERLINK "mailto:john@business.com" }
Club*	Which location they work at	Select club
Active	Can they access the system?	☑ Yes

Step 3: Save

- Click **"Save"**
- Staff receives login instructions via email

Staff Access

☐ **Tooltip:** Staff can only interact with cards and customers in their assigned club. This prevents cross-location issues.

Staff Portal URL:

reward.sociostacks.com/en-us/staff

Staff Capabilities:

- ☑Scan customer QR codes

Step 7: Save

- Click **"Create"**

Method 2: Batch Generation

Use Cases:

- Email marketing campaigns
- In-store QR promotions
- Social media giveaways
- Event handouts

Step 1: Navigate to Batches

Sidebar → Campaigns → Batches → Generate Batch

Step 2: Select Template Voucher

- Choose an existing voucher as template
- Settings are copied to all batch codes

Step 3: Configure Batch

Field	Description	Example
Batch Name*	Campaign identifier	"Q1 2025 Email Campaign"
Quantity*	Number of codes	500 (1-10,000)

Step 4: Generate

- Click **"Generate Codes"**
- System creates unique 8-character codes
- Each code can be claimed once

Step 5: Share Your Batch

QR Code:

1. Click QR icon on batch card
2. Download high-resolution PNG
3. Print for in-store signage

Claim URL:

1. Click "Copy Link"

- Bonus Points: Enter point amount

Step 3: Tab 2 - Usage Rules

Field	Description	Example
Max Discount Cap	Limit for percentage discounts	$50 maximum
Min Purchase Amount	Order threshold (cents)	2500 ($25.00)
Total Usage Limit	Max total redemptions	100
Per-Member Usage Limit	Max per customer	3
Single Use Only	One time per customer	☑ Yes
Valid From	Start date	Dec 1, 2025
Valid Until	End date	Dec 31, 2025

Step 4: Tab 3 - Eligibility & Targeting

Field	Purpose	Example
Target Specific Member	One customer only	Select member
Target Member Tiers	Tier restriction	Gold, Platinum
First Order Only	New customers only	☑ Yes
New Members Only	Recently joined	☑ Yes
New Members Definition	Days since joining	30 days

Step 5: Tab 4 - Design & Tracking

Field	Description
Background Color	Card color (hex)
Background Opacity	0-100% transparency
Text Color	Text color (hex)
Background Image	Custom image (800×600px)
Logo	Brand logo (square, 400×400px)
Source	How created (Manual Creation)
Stackable	Combine with other vouchers

Step 6: Tab 5 - Display Settings

Field	Description
Active	Master on/off switch
Public	Show in listings
Show on Homepage	Feature prominently

- $20 minimum purchase
- 500 bonus points reward
- Seasonal promotion

1.8 Creating Vouchers (BETA)

☐ **Tooltip:** Vouchers are digital discount codes that provide instant value—percentage discounts, fixed amounts, or free products.

Two Ways to Create Vouchers

1. **Manual Vouchers:** Individual codes with full customization
2. **Batch Generation:** Hundreds of unique codes for campaigns

Method 1: Create a Manual Voucher

Step 1: Navigate to Vouchers

Sidebar → Campaigns → Vouchers → Create New Voucher

Step 2: Tab 1 - Basic Information

Field	Description	Example
Name*	Internal reference	"Summer Sale 2025"
Code*	Customer enters/scans	SUMMER20
Title*	Customer-facing headline	"20% Off Summer Sale"
Description	Additional details	"Valid on all items"

Discount Type:

Type	What It Does	Example
Percentage Discount	X% off	20% off
Fixed Amount Discount	$X off	$10 off
Free Product	Specific item free	Free coffee
Free Shipping	No shipping charge	Free delivery
Bonus Points	Award loyalty points	+500 points

Discount Value:

- Percentage: Enter 20 for 20%
- Fixed Amount: Enter in cents (1000 = $10.00)

- **Requires Staff for Reward:** ☑ Yes

Option C: Mixed Rewards

- Both points AND physical item

Step 6: Tab 5 - Validity (Optional)

Field	Description	Example
Valid From	Program start date	December 1, 2025
Valid Until	Program end date	February 28, 2026

☐ **Tooltip:** Leave blank for perpetual programs. Use dates for seasonal campaigns.

Step 7: Tab 6 - Display Settings

Field	Description
Visible on Homepage	Feature on customer homepage
Max Enrollments Per Member	Limit enrollments (leave empty for unlimited)

Step 8: Tab 7 - Media

Field	Specs	Recommended
Logo Image	JPG/PNG/WebP, 5MB max	500×500px square
Background Image	JPG/PNG/WebP, 10MB max	1200×600px horizontal
Background Opacity	0-100%	60%

Step 9: Save

- Click **"Save"** or **"Save & Continue"**

Example Stamp Card Programs

Coffee Shop:

- 10 stamps required
- $3 minimum purchase
- Free large coffee reward
- Featured on homepage

Restaurant:

- 5 stamps required

Field	Description	Example
Internal Name*	For your organization only	"Coffee Loyalty - Winter 2024"
Club*	Which location	Select your club
Active	Is program live?	☑ Yes

Step 3: Tab 2 - Card Text

☐ **Tooltip:** All text fields support multiple languages. Add translations to reach international customers.

Field	Description	Example
Title*	Program name customers see	"Free Coffee Card"
Description	How it works	"Collect 10 stamps, get your next coffee free!"
Reward Title	Name the reward	"Free Large Coffee"
Reward Description	Reward details	"Any large coffee including specialty drinks"

Step 4: Tab 3 - Stamp Configuration

Field	Description	Example	Range
Stamps Required*	Total stamps to complete	10	1-50
Stamp Icon*	Emoji displayed	☕	Click to choose
Min Purchase Amount	Minimum per stamp	$5.00	Optional
Max Stamps Per Transaction	Multiple stamps allowed?	1	1-10
Daily Stamp Limit	Max stamps per day	3	Optional

Step 5: Tab 4 - Reward

Choose Reward Type:

Option A: Loyalty Card Points

- Automatically credit points when card is completed
- **Reward Points:** 1000 points
- **Linked Loyalty Card:** Select which card receives points

Option B: Physical Reward

- Customer claims tangible item in person
- **Requires Physical Claim:** ☑ Yes

☐ **Tooltip:** Select which rewards this card offers. You can choose multiple rewards at different point levels.

- Check the rewards available for this card
- Customers will see these options when redeeming

Step 6: Save

- Click **"Save"**

☑**Success:** Your loyalty card is created! You now have:

- A unique link to share
- A QR code to download and display
- Analytics tracking from day one

1.7 Creating Stamp Cards

☐ **Tooltip:** Stamp cards are digital punch card programs where customers collect a specific number of stamps to earn a reward.

What Are Stamp Cards?

Think of the classic "buy 10 coffees, get 1 free" punch card, but digital.

Differences from Loyalty Cards:

Feature	Loyalty Cards	Stamp Cards
Progress	Open-ended	Fixed goal
Earning	Points per purchase	Stamp per visit
Rewards	Multiple options	One reward per completion
Reset	Never (accumulates)	Resets after claiming reward

Step-by-Step: Create a Stamp Card

Step 1: Navigate to Stamp Cards

Sidebar → Stamp Cards → Create New Stamp Card

Step 2: Tab 1 - Card Details

Field	Description	Example

Prerequisites

- ☑At least one club created
- ☑At least one reward created

Step-by-Step: Create a Loyalty Card

Step 1: Navigate to Cards

Sidebar → Cards → Create Card

Step 2: General Settings

Field	Description	Options/Example
Name*	Card name shown to customers	"Main Loyalty Card"
Club*	Which club this card belongs to	Select your club
Active	Is card currently active?	☑ Yes / ☐ No
Visible on Homepage	Show on public homepage?	☑ Yes / ☐ No

☐ **Tooltip:** If "Visible on Homepage" is unchecked, customers can only access the card through direct link or QR code.

Step 3: Point Rules

Field	Description	Example
Currency*	Transaction currency	USD ($)
Points per Unit*	Points earned per currency unit	1 (1 point per $1)
Minimum Purchase	Optional minimum to earn points	$5.00
Welcome Bonus	Bonus points for first purchase	10 points

Step 4: Design

Element	Description	Example
Background Color*	Main card color	#7C3AED (purple)
Text Color*	Color of text on card	#FFFFFF (white)
Background Image	Optional image	Upload your image
Background Opacity	Image visibility (0-100%)	60%
Logo	Your business logo	Upload logo

Step 5: Rewards

Field	Description	Example
Active	Is this reward available?	Yes ☑

Step 3: Save

- Click **"Save"**

Reward Examples by Industry

Coffee Shop:

- Free Small Coffee — 50 points
- Free Large Coffee — 80 points
- Free Pastry — 100 points

Restaurant:

- Free Appetizer — 150 points
- 10% Off — 100 points
- Free Dessert — 200 points

Retail Store:

- $5 Store Credit — 100 points
- $10 Store Credit — 180 points
- 15% Off Purchase — 250 points

Setting Point Values

⬜ **Tooltip:** Consider your average transaction and desired redemption frequency when setting point values.

Guidelines:

- **Low (50-100 points):** Quick wins, frequent redemptions
- **Medium (150-300 points):** Balance between accessibility and value
- **High (500+ points):** Premium rewards, aspirational goals

---

1.6 Creating Your First Loyalty Card

⬜ **Tooltip:** Loyalty cards are points-based programs where customers accumulate points over time and redeem for various rewards.

Benefit	Description	Example
Points Multiplier	Multiply earned points	1.5 (50% bonus)
Redemption Discount	Reduce reward costs	0.10 (10% off)
Benefits List	Custom descriptions	"Free birthday reward"

Step 5: Tab 4 - Appearance

Field	Description	Example
Icon*	Emoji or symbol	☐ (gold medal)
Color*	Hex color code	#FFD700

Step 6: Save

- Click **"Save"** or **"Save & Continue"**

Example Tier Structure (Coffee Shop)

Tier	Level	Points	Multiplier	Icon	Color
Bronze	0	0	1.0×	☐	#CD7F32
Silver	1	1,000	1.25×	☐	#64748B
Gold	2	5,000	1.5×	☐	#FFD700
Platinum	3	15,000	2.0×	☐	#8B5CF6

1.5 Creating Rewards

☐ **Tooltip:** Create rewards BEFORE creating loyalty cards. When you build a card, you'll select which rewards it offers.

Step-by-Step: Create a Reward

Step 1: Navigate to Rewards

Sidebar → Rewards → Create Reward

Step 2: Enter Reward Details

Field	Description	Example
Name*	What the reward is called	"Free Large Coffee"
Description	Details about the reward	"Enjoy any large coffee of your choice"
Points Required*	Points needed to redeem	500

- **Higher Retention:** VIP status creates emotional attachment
- **Better Rewards:** Top customers get multiplied points and discounts
- **Clear Progression:** Visual progress tracking motivates action

Step-by-Step: Create Your First Tier

Step 1: Navigate to Tiers

Sidebar → Campaigns → Tiers → Create New Tier

Step 2: Tab 1 - Details

Field	Description	Example
Name*	Internal identifier	"Gold Tier"
Display Name*	What customers see	"Gold Member"
Description	Summary of benefits	"Earn 1.5× points on all purchases"
Club*	Which club this tier belongs to	Select your club
Level*	Hierarchy position	2 (0=base, higher=better)
Is Default	Auto-assign to new members	No ☐
Is Active	Enable this tier	Yes ☑

Step 3: Tab 2 - Qualification

☐ **Tooltip:** Tiers are based on lifetime points earned, not current balance. This rewards loyalty history.

Evaluation Mode:

- **Points Only:** Member must meet points threshold
- **Spend Only:** Member must meet spend threshold
- **Transactions Only:** Member must meet transaction count
- **Any:** At least one threshold
- **All:** All thresholds must be met

Thresholds:

Threshold Type	Description	Example
Points Threshold	Lifetime points earned	5,000 points
Spend Threshold	Lifetime purchase amount (cents)	50000 (=$500)
Transactions Threshold	Number of purchases	25 transactions

Step 4: Tab 3 - Benefits

Step 1: Navigate to Clubs

Sidebar → Clubs → Create Club

Step 2: Enter Club Information

Field	Description	Example
Name*	Internal reference for your team	"Downtown Store"
Description	Optional details	"Main location in downtown area"

Step 3: Save

- Click **"Save"** button

☑**Success:** Your first club is created! You can now assign staff and create cards for this location.

Single vs Multiple Locations

Single Location:

- Create one "default" club
- All staff and cards belong to it
- Example: "Main Location"

Multiple Locations:

- Create one club per location
- Staff at Location A can only interact with Location A's cards
- Example: "Downtown Store", "Mall Location", "Airport Kiosk"

1.4 Setting Up Membership Tiers (Optional)

☐ **Tooltip:** Membership tiers transform your loyalty program from simple point accumulation into a status-driven engagement platform.

What Are Tiers?

Tiers are VIP levels like Bronze, Silver, Gold, Platinum where members automatically progress based on loyalty activity.

Benefits of Using Tiers

- **Increased Engagement:** Customers work toward the next level

1.2 Partner Dashboard Navigation

Main Sidebar Menu

Menu Item	Purpose
Dashboard	Overview of your loyalty program performance
Cards	Manage loyalty cards
Stamp Cards	Manage stamp card programs
Clubs	Organize by location/business unit
Tiers	Set up membership tier levels
Rewards	Define what customers can earn
Staff	Manage employees who handle transactions
Members	View customers using your programs
Campaigns	Manage vouchers and promotions
Analytics	Detailed performance insights

Quick Access Features

- **Search Members:** Quick search bar to find customers
- **Recent Activity:** View latest transactions
- **Notifications:** System alerts and updates

1.3 Creating Your First Club

☐ **Tooltip:** Clubs are organizational units that connect staff to loyalty cards. Even with one location, you need at least one club.

Why Clubs Matter

Clubs represent:

- Physical store locations
- Restaurant branches
- Service centers
- Individual franchises

Step-by-Step: Create a Club

☐ **Tooltip:** Partner registration must be enabled by the platform administrator. If you don't see a registration option, contact the platform owner.

1. Click **"Create one"** below the login form
2. Enter your **Business Name**
3. Enter your **Email Address**
4. Select your **Timezone** (optional but recommended)
5. Check **"I agree to Terms of Use and Privacy Policy"**
6. Optionally check **"Send me email updates"**
7. Click **"Create Account"**

Step 3: Email Verification

☐ **Tooltip:** Check your spam folder if you don't receive the verification code within a few minutes.

1. Check your email for a **6-digit verification code**
2. Enter the code in the verification screen
3. Code submits automatically when complete
4. Your account is verified and you're signed in

Starting Plan

- New accounts receive the **Bronze Plan (Free)**
- Includes: 1 loyalty card, 100 members, 1 staff member, 3 rewards, 1 club

Subsequent Logins (Passwordless)

Option 1: Magic Link

1. Go to `/partner` login page
2. Enter your email address
3. Click **"Send me a login link"**
4. Check your email and click the magic link
5. You're automatically logged in

Option 2: Verification Code

1. Go to `/partner` login page
2. Enter your email address
3. Click **"Send me a login code"**
4. Check your email for 6-digit code
5. Enter code on verification page
6. You're logged in

☐ **Tooltip:** Verification codes expire after 10 minutes. Request a new code if needed.

Feature	Business Owner	Staff	Customer
Award Points/Stamps	✗	☑	✗
Process Redemptions	✗	☑	✗
Collect Cards	✗	✗	☑
Earn Rewards	✗	✗	☑
View Analytics	☑	✗	✗

Getting Started

System Requirements

- **Modern web browser** (Chrome, Firefox, Safari, Edge)
- **Internet connection**
- **Mobile device** with camera (for QR code scanning)

Account Types

- **Free Plan (Bronze):** 1 loyalty card, 100 members, 1 staff, 3 rewards, 1 club
- **Pro Plans:** Available at { HYPERLINK "https://sociostacks.com/rewardcard.html" }

User Role 1: Business Owner Dashboard

Overview

As a Business Owner (Partner), you have complete control over your loyalty program. You can create loyalty cards, stamp cards, vouchers, manage staff, set up rewards, and track performance through analytics.

1.1 Partner Registration & Login

First-Time Registration

Step 1: Access the Partner Portal

URL: reward.sociostacks.com/en-us/partner

Step 2: Create Your Account

SocioStacks Reward Card - Dashboard Walkthrough Guide

Website: { HYPERLINK "https://sociostacks.com/rewardcard.html" }

Table of Contents

Introduction

What is SocioStacks Reward Card?

SocioStacks Reward Card is a comprehensive digital loyalty reward system designed for both multiple businesses (partners) and single businesses that need a digital savings card solution.

Three User Roles

1. **Business Owner (Partner)** - Creates and manages loyalty programs, cards, staff, and views analytics
2. **Staff** - Processes customer transactions, awards points/stamps, and handles redemptions
3. **Customer (Member)** - Collects loyalty cards, earns points/stamps, and redeems rewards

Key Features Overview

Feature	Business Owner	Staff	Customer
Create Loyalty Cards	✓	✗	✗
Create Stamp Cards	✓	✗	✗
Create Vouchers	✓	✗	✗
Manage Staff	✓	✗	✗