

WMS: Did You Know?

From Professor Merlot



Reward Points: How to accumulate these for each customer?

#25

WMS has 2 reward options for your customers: the **Hard Count** of batches ordered in WMS (using the **Wine Count Limit** as the bench mark) and the **Points Count** (based on the dollar value using the **Percentage for Points** value) of each product purchased. Each of these options are geared around two dates built into WMS (one for the system and one for each customer);

- Preferences - **Start Date for Wine Count**

- On the **Preferences** form (the **WMS Defaults** Tab) this entry is to indicate **WHEN** the start of the points system is first active for your business.
- Any purchase **PRIOR** to this date will not be included in a customer's credit towards their reward points.
- Here, the start date is Jan 1, 2000.

Enter company details and system defaults	
Company Info	WMS Defaults
Area Code	604
Wine Count Limit	10
Start Date for Wine Count	01-01-2000
Percentage for Points	1%
Accounting Program	QuickBooks

- Customer Information - **Date that wine count is entered.**

- On the Customer Information form (**Wine Count Info** tab) the date entered, must be **AFTER** the **Preferences Start Date**.
- Normally, this date is an automatic entry when a new customer is added to the WMS system. It defaults to the current date.
- The **Wine Count**, **Beer Count** and **Points Count** fields are static fields that may be used for holding the appropriate counts from a paper based system prior to installation of WMS into your business. These 3 static fields are added to the overall total for this customer as Invoice orders are added to his history. These may also be changed for bonus credits for other promotions.

Customer Info	Wine Count Info	Company	Notes, Recipes & Calls
Prefix	First Name	M.Initial	Surname
	[Snidely]		[Whiplash]
Date that wine count is entered	Wine Count	Beer Count	Points Count
01-30-2000	0	0	\$0.00

- Invoice – Customer Information tab – **Points display**

- It is on the second tab of the Invoice, **Point of Sale**, that a customer's point accumulation, displays the latest totals.
- Products with a **Wine Count** or **Beer Count** check will be included in the totals.
- Points shown here may be redeemed as either **Redeem Beer Pts** or **Redeem Wine Pts** using the **Payments** form during an Invoice order.

Customer Info & Comments		Verify In Production	
Invoice Number	11705	Locked	<input checked="" type="checkbox"/>
Add Cost/bottle to Comments			
Comments: Invoice & Production Label			
Points:			
Total Of Sales	Re-deemed	Current Points	Beer Points
\$3,216.40	\$20.00	\$12.16	\$0.00
Wine Points			\$12.16

