Loyalty on the phone - the handset cheat-sheet

Loyalty on your phone

The handset cheat-sheet - the words and buttons GregMart Rewards answers. GregMart is a made-up store.

START

Scan the QR code on a store's poster.

Text a word, or the code under a poster's QR code, to the store's number.

On the store's website, select Send it to my phone.

TEXT A WORD

REWARDS	Points, visits and a menu of it all
COUPONS	This week's coupons, then Open
DEALS	Deals running now, bought at the till
AD	This week's ad, page by page
WALLET	Everything you hold, ready to scan
USEIT	Straight to a code for the cashier
POINTS	Your balance, and Get it on a reward
TIER	Your tier, your visits, the next tier
CHECKIN	Check in for today's visit
STORES	The nearest stores, with directions
STOP	Ends the store's own messages
START	Lets them reach you again
HELP	How to ask, and how to stop

Every word works on RCS, WhatsApp and Apple Messages.

KEEP IT YOURS

Not you? on the website signs you out and forgets this device straight away.

A signed-in link works once, for five minutes.

ONE CARD, THEN OPEN

Hi Jordan - your coupons

28 coupons live this week - 6 already in your wallet.

Open coupons | Use it now | Check in

RCS - Open slides the page up, signed in.

WhatsApp - signed in when Open is a button.

Apple Messages - browse, then a code for your wallet and points.

AT THE TILL

1. Text USEIT or tap Use it now, and pick it.
2. Show the code. The cashier scans it.
3. Tap I've paid, Show another or It didn't scan.

Won't scan? The cashier can type the code or find you by phone.

Shopping online? Open your wallet and select Copy the code.

CHECK IN

Text CHECKIN or scan the poster by the door, then share your location or snap the sign.

Once a day per store - 25 points a visit at GregMart.

YOUR CARD ON YOUR PHONE

In the web wallet, select Add to Apple Wallet or Add to Google Wallet. The till scans the member number on the card.

It keeps the day's points - add it again to refresh.

FOR THE STORE TEAM - Redeem at the register, or the phone till at go.rcsbuilder.com/redeem/

Scan what they show → Ready to redeem? → Redeem → Receipt

Needs the Store redeemer role at the store's merchant.

Enter never redeems. Try again never uses a coupon twice. Undo within 10 minutes.

The numbers: Today at this store, Redemptions with Download, and Shopper search.

Picture 1. The cheat-sheet on one page, to print or share. The full sheet follows.

> Everything a shopper can do with a store's loyalty program on their phone, and the store team's side of it at the till. The words and buttons are the ones GregMart Rewards answers today. GregMart is Listrak's made-up store and Jordan R. is its made-up sample member, so treat GregMart's words as the recommended set and check your own program's with your Loyalty manager. The whole journey is drawn in Loyalty system diagrams.

For the shopper

Start

Do this	What happens
Scan the QR code on a store's poster	The store's conversation opens on your phone. A poster made as a store's door also says which store you are at.
Text a word such as **REWARDS** or **COUPONS** to the store's number, or the code printed under a poster's QR code	That conversation starts straight away. A word sent as an ordinary text message starts it on RCS.
Sign in on the store's website and select **Send it to my phone**	Your wallet arrives on your phone as a conversation, ready for the till.

The words to text

Every word works on RCS, WhatsApp and Apple Messages, in capitals or not.

Text	What comes back
REWARDS	A greeting with your points, visits and wallet, then a menu of everything below.
COUPONS	One card that says how many coupons are live and how many you hold, with **Open coupons**.
DEALS	One card with the deals running now and **Open deals**. A deal is bought, never clipped - tap **Buy** on a deal and pay in the chat.
GIFTS	The store's gift certificates, for members - a phone that is not one is told how to join. Choose one, say **For me** or **A gift for someone**, pick an amount (or **Another amount**), choose how many points to use, and pay in the chat. It never expires.
AD or **WEEKLY AD**	This week's ad on one card, with **Open the ad** to turn its pages.
WALLET	Your points and everything you hold, with **Open wallet** for every code.
USEIT or **USE IT NOW**	You pick an item, and its code appears for the cashier to scan.
POINTS	Your balance and the rewards it buys. **Get it** puts a reward in your wallet.
TIER or **VISITS**	Your tier, your visits and how far you are from the next tier.

Text	What comes back
CHECKIN or **CHECK IN**	Today's check-in, by your location or a photo of the sign by the door.
STORES	The stores nearest to you once you share your location, each card with its own **Directions**.
WEEK, **FIND**, **PICKS**, **HUNT**, **LIKES**, **BIRTHDAY**, **SHARE** and **FEEDBACK**	What ends this week, help finding something, deals picked for you, the deal hunter's collections, the departments you love, the birthday club, coupons to pass on, and a rating for your visit.
STOP, **START** and **HELP**	These work for every business and always come first. **STOP** ends the messages the store starts on its own, on every phone channel, while anything you start still answers you. **START** brings them back, and **HELP** says how to ask for what you want and how to stop.

The card and its Open button

Most words answer with one card and an **Open** button that opens the full page, with search, filters, every offer's details, **Clip** and your codes for the till. Under the card, **Use it now** and **Check in** are what shoppers usually do next in the store, and **Do more** lists the store's other conversations.

On	What Open does
RCS	It slides the page up over the conversation, already signed in when your phone number is a member.
WhatsApp	It arrives signed in when the card has no quick replies. Beside quick replies the link shows as text, and the page asks you for a code.
Apple Messages	It shows the coupons, the deals and the ad. Apple does not share your phone number with the store, so your wallet and points need a code first.

A signed-in link works once, for five minutes. After that, the page asks for a code and shows nothing about you until you enter it.

Clip, use it and check in

To	Do this
Clip a coupon	Tap **Clip**, and the coupon is in your wallet. A coupon you hold is never clipped twice. On the website before you sign in, it says **Clipped - sign in to keep it**.
Use it at the till	Text **USEIT** or tap **Use it now**, pick the item and show the code. Then tap **I've paid**, **Show another** or **It didn't scan**. A code that will not scan can be typed in, or the cashier can look you up by your phone number.
Use it online	Open your wallet, tap the coupon and select **Copy the code**.
Check in	Text **CHECKIN** or scan the poster by the door, then share your location or snap the sign. A visit counts once a day per store, and your location is never kept. The answer shows your new balance as a card, with the points that just landed and how far you are from the next tier.

To	Do this
Check in at the register	Scan the QR code on the till's screen and send the message it writes. Your visit counts at that register, and the answer lists everything in your wallet you can use there, each with its code. The code changes every minute - if it has changed, scan the screen again.
Spend your points	Text **POINTS** and tap **Get it** on a reward. The points come off when the till scans it. When the store lets points pay toward deals and gift certificates, **Use your points toward it?** takes them off the price before you pay.
Spend a gift certificate	Show its code at the till - on the printed certificate, or on the certificate page **Print it** opens on your phone. The till takes what you spend and keeps the rest on it for next time. Treat the code like cash: whoever holds it can spend it.

Your card in your phone's wallet

On the store's website, open **My wallet** and select **Add to Apple Wallet** or **Add to Google Wallet** under **Your card on your phone**. In the conversation, the **WALLET** card's **Put it on my phone** does the same: it opens your wallet already signed in, lights up **Your card on your phone** and shows the button your phone uses. The card carries your first name, your points and tier on the day you added it, and your member number as a barcode the till can scan. It never shows your phone number or email address. On an iPhone, pull down on the back of the card in Wallet to bring your points up to date. A store has to finish its wallet set-up before a phone will take its card, and until then the page says the card is a test card.

Each coupon, deal, reward and gift certificate you hold can go into your phone's wallet on its own too: open it in **My wallet** and select **Add to Apple Wallet** or **Add to Google Wallet** under **Keep it on your phone**. A link in the conversation that names one of them, such as **Add it to my phone**, opens your wallet already signed in on that item with the buttons in view. A gift certificate's pass carries its whole code, which spends like cash, so add it only to your own phone.

Sign in, and keep it yours

- *From the conversation*, tap **Open** on RCS, or on WhatsApp where the link is a button, and you arrive signed in.
- *On the website*, type your mobile number in **Your phone or email**, select **Text me a code**, enter the six-digit code and select **Sign in**. Tick **Keep me signed in on this device** only on your own phone.
- **Not you?** under your points signs you out and forgets the device. A website that recognizes you can only ask "Are you Jordan R.?", and nothing opens until a code sent to your own phone or email proves it.
- *If you are not a member yet*, the coupons, deals and ad still work, and the page tells you where to join, which today is at the register.

For the store team

The desk

You redeem on **Redeem at the register** in the Portal, under **Shoppers**, or on the phone till at go.rcsbuilder.com/redeem/, which **Open the till on your phone** opens from the Portal's desk. Both run the same checks. You need the **Store redeemer** or **Loyalty manager** role at your store's merchant.

What to scan into the one field

The shopper shows	What you get
A coupon's QR code, or a coupon code such as SAVE5-7QK2	That coupon, judged for your store right now.
Their member card in a phone wallet, or their member number	The member and everything they hold.
Their phone number	The member, within the program you choose.
The code on your register's screen	Proof the shopper is at your till, shown under **Register code**.
A gift certificate's code	**Gift certificate** and what is left on it - never who holds it. Type the amount to take, or leave it blank to take the smaller of what is owed and the balance. The receipt says what is left.

Redeem exactly once

1. Scan or type what the shopper shows and press Enter. For a member, select **Use this** beside the item they want.
2. Read whether it can be used: **Ready to redeem**, **Check at the till first** or **Can't be used here now**, with the reasons.
3. When it asks, type the basket total, and tick the box once you have checked the basket at your till.
4. Select **Redeem**, read the receipt, then select **Next shopper**.

Pressing Enter never redeems, so a scanner cannot redeem by accident. If the connection drops, select **Try again**: the coupon is never used twice, and when the first try landed you see that receipt. A coupon another till already took is recorded with **Used at another till?** and **Record the use**.

To undo, select **Undo** on the receipt, say why under **Why**, leave **Put the coupon back in the member's wallet** ticked and select **Undo the redemption**. You can undo at the register for 10 minutes, and your Loyalty manager can undo at any time. An undone redemption stays on the record, marked **Undone**, and its points are taken back.

Where the numbers are

Look at	To see
Today at this store	Every redemption at your store since midnight, on the store's own clock.
Redemptions	Every use at your stores, with who, where and when, filtered by store, offer and dates, with **Download**.
Overview	The program's figures, such as **Members**, **Stores**, **Live offers** and **Live circulars**.
Shopper search	Your shelf as a shopper finds it, and the searches that found nothing.

Demo it in two minutes

1. Open Listrak Stores & Loyalty and, under **Try a command**, tap **COUPONS**. On a wide screen, **Open coupons** opens the page beside the conversation, signed in as Jordan R. Clip a coupon.
2. In *One card, and Open*, tap **Show my wallet**. The card's **Open** slides the wallet up inside the conversation box, the way it opens over a real RCS thread, and beside it **Your card on your phone** shows the member card a member adds to a phone's wallet.
3. Tap **MY WALLET** and open a code, then select **Open the demo till** and **Read the code the wallet is showing**. The demo till checks the code for real and stops just before it would use it up.
4. Everything there is counted on Jordan, a made-up member, and never on a real shopper.

Before the posters go up

- Ask your Loyalty manager to print each door's poster from a code made as that store's door, so a scan or a photo of the sign proves a visit at that store and no other. A poster from an ordinary code still opens the conversation, but the check-in then relies on the shopper's location.
- Print the words your program answers on the poster, such as "Text COUPONS", for shoppers who would rather text than scan.

Read next: Merchant redemption guide, Loyalty system diagrams, the website add-ins and Playbook: loyalty on the thread `developer sign-in`.