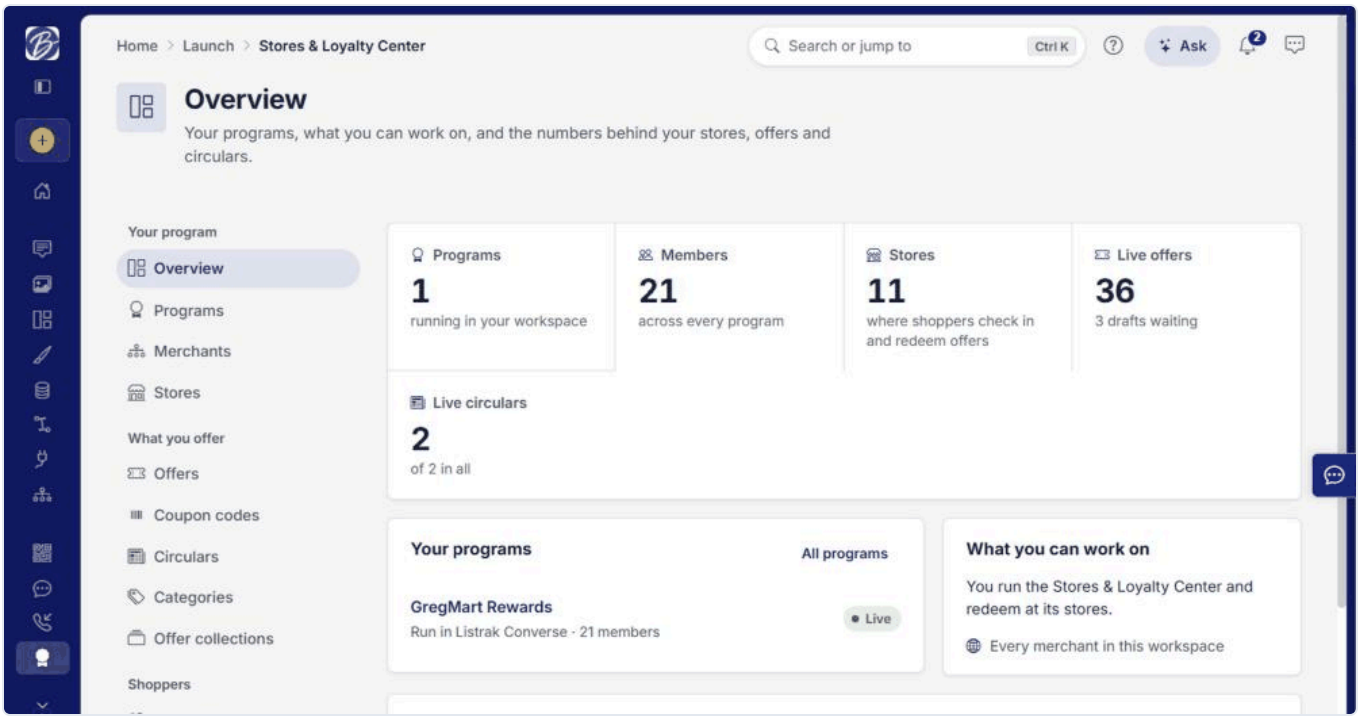
Stores & Loyalty Center

What this page is for

The **Stores & Loyalty Center** is where you run your loyalty program in Listrak Converse. You set up the program itself - how members earn points, the tiers they climb, what a check-in must prove and the terms people agree to when they join - and your brand's own merchant, which everything else hangs beneath. From here you also reach the merchants and stores under it, the coupons, deals and rewards members clip, buy and earn, the codes behind your coupons, your members and what they hold, your weekly circulars, the categories and offer collections that file and feature them, and your shelf seen the way a shopper finds it.

The Stores & Loyalty Center appears in the menu under Launch once the Loyalty skill is switched on in your workspace. People who run the program, and people who redeem at the stores, can open it. Someone who works for one merchant only, such as a partner restaurant or a department counter, sees the pages for that merchant and nothing else.

What you see



- *The menu on the left.* Every page of the Stores & Loyalty Center, in four groups. **Your program** holds **Overview**, **Programs**, **Merchants** and **Stores**. **What you offer** holds **Offers**, **Coupon codes**, **Circulars**, **Categories** and **Offer collections**. **Shoppers** holds **Members**, **Redeem at the register**, **Redemptions**, **Activity**, **Devices** and **Shopper search**. **Your systems** holds **POS connections**, a preview of how your stores' point-of-sale systems will work with Converse. You only see the pages that are yours to open:

someone who works for some merchants only does not see **Programs** or **POS connections**, because they belong to the whole workspace, and someone who only redeems at the register does not see **Activity**, because it names members.

- *The overview.* When your program is new, **Get your program going** lists what to do first - **Make your program**, **Add your stores** and **Make your first offer** - with **Start** beside each one that is not done yet. Then come the figures: **Programs**, **Members**, **Stores**, **Live offers** and **Live circulars**. Each figure opens the page behind it. A dash means the figure could not be read just now; it never stands for zero.
- *The numbers.* What shoppers did in the days you choose - **Today**, **7 days**, **30 days**, **90 days** or **Choose days** - counted in your workspace's own time zone: **Members joined**, **Check-ins**, **Clips** (offers saved to a wallet), **Redemptions** (uses that stand, with any a member marked used themselves or that were undone named underneath), **Discount given** in each currency, **Deals bought** with what they sold for, and **Circular views**. If you run the program (Loyalty manager), select **Redemptions**, **Discount given**, **Deals bought** or **Circular views** to open Activity on the same days, showing just that; for someone who only redeems at the register they are figures. **Members joined** opens **Members**. **Check-ins** and **Clips** are figures only: Activity lists everything that arrived in a wallet together, deals bought and gifts as well as clips, so it cannot show the clips on their own. A 0 means nothing happened in those days. A dash means the number could not be counted for you, never zero: someone who works for some merchants only sees a dash under **Members joined**, because a member joins a program, not a merchant. Points given and spent, and how long a shopper spent on a circular page, are not counted here yet, and the page says so.
- *Deal sniffers.* For the people who run the program only: members who opened deals again and again in those days without buying any of them, with how many times and when they last looked. Select a member to open their page, or **See the activity** for everything they did. A nudge to them is a marketing message, so it goes through consent like any other, and every time this list is shown, Converse records who looked.
- *Wallet health.* For each program, what members hold now (**Held now**), how many will end within the next 7 days never used, and - in those days - how many were looked at again, used, and ended unused.
- *Some sources have gone quiet.* When stores, offers or circulars brought in from another system have passed the date that system said it would refresh them by, the overview names the system, how many it brought in and since when, so you can check that the sync is still running.
- *Your programs.* Each program your workspace runs, with how it runs, its member count and its status: **Draft**, **Live**, **Paused** or **Ended**.
- *What you can work on.* Whether you work on every merchant in the workspace, or which merchants you work for and what you can do for each: **Can view**, **Can redeem**, **Can edit** or **Owner**.
- *Programs.* One row for each program, with its name, how it runs, its members, where it came from and its status. A program brought in from another system carries a small label naming that system, and when your programs came from more than one place, the **Source** filter shows only the ones from one of them - or only those **Made here**. Retired programs are not listed; each still opens from its own link.
- *A program's page. The essentials* sit at the top, always open: the program's **Name**, its **Status**, **What members call points** and how many a purchase earns. Below them, every other part of the program sits behind its own heading - **About the program**, **Points awards**, **Check-ins**, **Joining and sharing**,

Expiry and **Your note** - and each heading says, in one line, what is set inside it, such as "10 for a check-in · 100 for joining". Select a heading to open it. Under them come the program's **Tiers**.

- *The save bar.* While you have changes that are not saved yet, a bar floats at the bottom of the page with **You have unsaved changes**, **Reset** and **Save**.
- *Merchants and stores.* **Merchants** holds your departments, concessions and partners, their people and who reaches them. **Stores** holds your real stores, with their hours, their pin on the map and their stories. Each has its own guide: Merchants and Stores.
- *Categories and offer collections.* **Categories** holds the category tree everything is filed under, and the codes your other systems use. **Offer collections** holds the sets of offers and circular items you feature. Each has its own guide: Categories and Offer collections.
- *Offers, circulars and shopper search.* **Offers** holds the coupons, deals and rewards shoppers get. **Circulars** holds your dated sale flyers - their pages and the items on sale. **Shopper search** shows your shelf the way a shopper finds it, and what shoppers looked for and could not find. Each has its own guide: Offers, Circulars and Shopper search.
- *Members, codes and the register.* **Members** holds the people in your program, with their wallets, points and visits. **Coupon codes** holds the codes behind your coupons. **Redeem at the register** is the till, where a store uses what a shopper shows exactly once, and **Redemptions** is the usage report of every use. Each has its own guide: Members, Coupon codes, Redeem at the register and Redemptions.
- *POS connections.* A preview of how the point-of-sale systems your stores ring up sales on will connect to Converse. Its guide: POS connections.

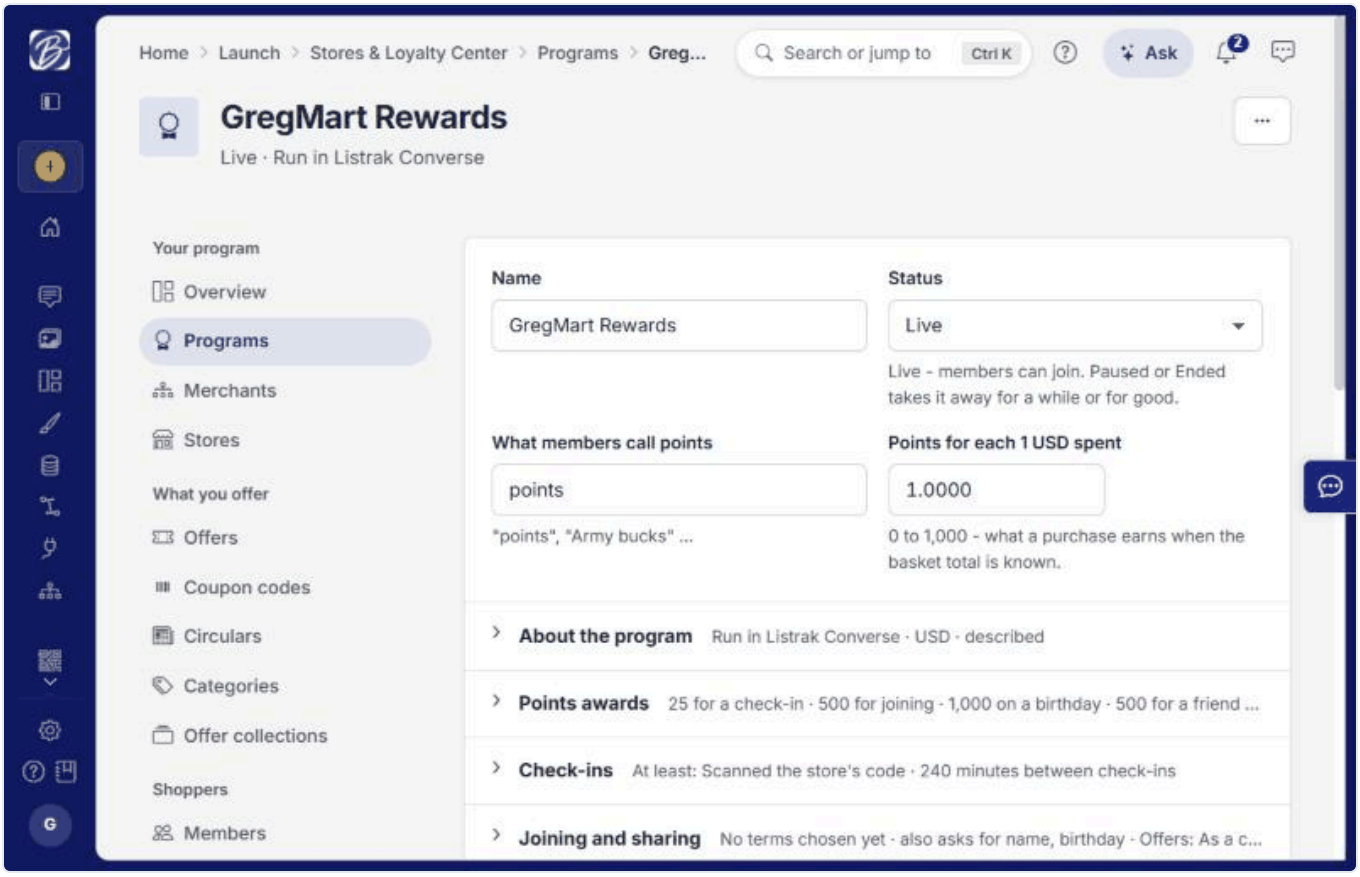
What you can do

Make your program

1. Open **Programs** and select **New program**.
2. Type the **Name** members will read, such as GregMart Rewards. Converse fills in the **Short name** for you; change it now if you like, because it never changes once the program is made.
3. Choose **How it runs**: run here in Listrak Converse, synced from a club you already have, or both.
4. Select **Make the program**. The program opens on its own page, as a draft, so you can set its rules before members see it.

Your first program also makes your brand's own merchant - the one your stores, departments and partners sit beneath. If Converse could not make it, because another merchant already uses that short name, **Name your brand's merchant** appears on **Programs**. Type its name, such as GregMart, check the **Short name**, and select **Make it**.

Set how members earn points



1. Open the program from **Programs**.
2. In the essentials, say **What members call points** and how many points each dollar earns. The **Currency** is under **About the program**.
3. Open **Points awards** and give points for a check-in, for joining, for a birthday and for a friend who joins. Leave a box empty to give nothing for it.
4. When the program has tiers, give each tier a multiplier there too, so your best members earn more.
5. Select **Save** on the bar at the bottom. If something needs a fix, a note appears beside the field, the section it is in opens, and your cursor moves to it - nothing is saved until you correct it.

Decide what a check-in must prove

1. On the program's page, open **Check-ins**.
2. Under **A check-in must at least have**, choose the weakest proof you accept. Scanning the register's code is the strongest, then sharing a location in the store, then scanning the store's code, then picking the store from a list.
3. Set **Minutes between check-ins** if a member may check in again on the same day. A store counts once a day either way.
4. Select **Save**.

Choose the terms, what joining asks for, and how offers are shared

1. On the program's page, open **Joining and sharing**.
2. Under **Terms people agree to when they join**, choose your program's terms from your workspace's consent wording. Joining records which version each member agreed to. The wording itself is kept in the Compliance Center; if you cannot open the list, someone who looks after your integrations or audits can choose the terms for you. Shoppers who join on your website see the terms in the join form, so they must be written words or a link to a page: if the terms you pick point at a conversation's moment, a surface or a form, the hint under the list says your website offers no join - shoppers there are asked to join at the store or by text - until you pick terms it can show.
3. Under **Joining also asks for**, tick the details you want beyond the mobile number. The mobile number is always how Converse knows a member.
4. Under **Marketing sign-up on your website**, choose consent wording that covers marketing if you want shoppers who join from your website's add-ins to be able to say yes to deals by text or email. The join form then shows its own box with exactly those words, never ticked for the shopper, and a ticked box records that person's marketing permission. Choose **No marketing box** to leave it out. The list offers only wording your website can show: written words that cover marketing and RCS, WhatsApp, SMS or Email. If a choice you saved earlier no longer fits, the hint under the list says why the website shows no box.
5. Under **Offers are shared**, choose whether a member can pass an offer to a friend, and whether both keep it or the giver hands it over.
6. Select **Save**.

Let points expire

1. On the program's page, open **Expiry**.
2. Choose **Points never expire**, or choose that points expire after a member is inactive for a while and say after how many months.
3. Select **Save**.

Add tiers

1. On the program's page, find **Tiers** and select **Add a tier**.
2. Give the tier a **Name** and a **Rank**. A higher rank is a better tier.
3. Under **Reached by**, choose **Lifetime points** or **Visits**, and say how many it takes. For visits, tick **Count only recent visits** to count only the last so many days.
4. Describe the **Benefits** a member at this tier gets.
5. Select **Add a tier**. To change a tier later, select **Edit**; to remove it, select **Delete** and then **Delete the tier**.

Open the program to members

1. On the program's page, select **Make it live** at the top. Any changes you have not saved yet are saved with it.

2. If the program has no terms yet, Converse opens **Joining and sharing** and asks you to choose them first, because joining is agreeing to the program's terms.
3. To stop for a while, set the **Status** to **Paused**; when the program is over, set it to **Ended**. Then select **Save**.

Retire a program

1. On the program's page, open the ⋯ menu at the top, select **Retire**, then confirm **Retire this program?** with **Retire**.
2. If a live offer still runs in the program, Converse says so and keeps the program. End its offers first, then retire it. A retired program stays readable from its own link.

Let members use their points toward purchases

1. Open your program and go to **Use points toward purchases**.
2. Choose **Members can use points toward purchases**.
3. Fill in the rate: how many points take 1.00 off. Points always take money off a price; they have no cash value of their own.
4. Choose **Points in increments of** and **The fewest points at once** if you want points used in round numbers, and **The most of a price points may pay (%)** to keep part of every price on the card.
5. Under **Points may pay toward**, keep **Deals** on. Turning on **Gift certificates** asks you first, because points put toward a gift certificate become value a person can spend like cash - check with your counsel before you select **Turn it on**.
6. Under **Purchases earn points**, choose whether buying a deal or a gift certificate earns points on the money paid. Both are off at first, because the till earns points when the voucher or certificate is spent.

Saving another section of the program keeps these settings exactly as they are.

Keep the diagrams and the guides at hand

1. On the overview, select **Diagrams** at the top of the page. Loyalty system diagrams opens: the whole Stores & Loyalty Center in nine pictures, from a member's day at the store to a redemption at the till and everything on the phone on one page.
2. Select **Download the guides**. A zip of every Stores & Loyalty guide as a PDF downloads, ready to share with your store teams or a partner.

How it fits

Loyalty is one of the ways people start a conversation with your brand. A member scans the code at your door, and the conversation that opens checks them in, shows what is on sale and keeps their coupons; a word such as "COUPONS" or "WALLET" answers with one card that opens the full page of coupons, deals, this week's ad or their wallet. The same coupons, deals, ad and wallet can sit on your own website through the add-ins, and a store can redeem on a phone at the counter as well as in the Portal. The Stores & Loyalty

Center is where you decide what all of them offer: the program sets the points, the tiers and the terms people join under, and the stores, offers and circulars you publish are what members see. What members do comes back as answers you can read on the Answers page and count on the Goals page.

A department store can run its departments and partners as merchants under the brand, each with its own people who can sign in and work only on their own offers. A brand with a club it already runs can bring its members and offers in, and the Stores & Loyalty Center shows a label on everything that came from another system.

Good to know

- The Stores & Loyalty Center appears only once the Loyalty skill is switched on in Integrations, under Skills. If you open a page of it before then, it says so, and someone who can switch skills on sees **Switch it on in Skills**; everyone else is told whom to ask. Switching the skill off hides the Stores & Loyalty Center but deletes nothing.
- Two roles open it: the role that runs the Stores & Loyalty Center, and the role that redeems at the stores. Someone who only redeems can read every page but cannot change anything. Roles are given on the Users page.
- Someone who works for one merchant only sees that merchant's pages and numbers. The member count belongs to the whole workspace, so they do not see it.
- A program, a tier or another record brought in from another system keeps that system's fields read-only here, and says which system owns it. You can still write your own note.
- If you try to leave a program's page with changes that are not saved, Converse asks first: **Stay**, or **Leave without saving**. Closing the tab asks too.
- A tier that counts only recent visits cannot be changed back to all visits, or to points, on this page yet. Delete the tier and make it again.
- If a figure or a list cannot be read, the page says so and offers **Try again**. Nothing on the page is guessed, and every message is in your language.
- Two parts of a program are not on its page yet: putting the program on your own website (which websites may show the add-ins) and the member card members add to Apple Wallet or Google Wallet. Both are set through the Loyalty API or by an AI assistant on Converse's MCP server - ask whoever looks after your integrations. See Loyalty on your website - the add-ins.

Related pages

- Integrations: switch on the Loyalty skill under Skills.
- Merchants: your departments, concessions and partners, their people and who reaches them.
- Stores: your real stores, their hours, their pin on the map and their stories.
- Launch codes: the QR codes and short links that start a conversation.
- Users: give people the roles that open the Stores & Loyalty Center.
- Compliance: the consent wording your program's terms come from.
- Categories: the category tree, and the codes your other systems use.
- Offer collections: the offers and circular items you feature, picked by hand or kept current by rules.

- Offers: the coupons, deals and rewards shoppers get.
- Circulars: your dated sale flyers, their pages and the items on sale.
- Redeem at the register: look a shopper up and redeem what they show you, exactly once.
- Redemptions: every coupon, deal and reward used, with who, where, when and how much.
- Activity: everything shoppers did with your offers and circulars, newest first, and the download for a spreadsheet.
- Shopper search: your shelf the way a shopper finds it, and the searches that found nothing.
- POS connections: a preview of how Square, Toast, Clover and other point-of-sale systems will work with Converse.
- Members: the people in your program, their wallets, points and visits.
- Coupon codes: the codes behind your coupons.
- Loyalty on your website - the add-ins: your coupons, deals, weekly ad and members' wallets on your own website.
- The till on your phone: the register desk on a phone at the counter.