USER GUIDE · VERSION 1

# Membership and Loyalty

Customers join with their phone number, earn points on every order, move up tiers that earn faster, and spend points as a discount at checkout. Still being built: these pages cover what works today.

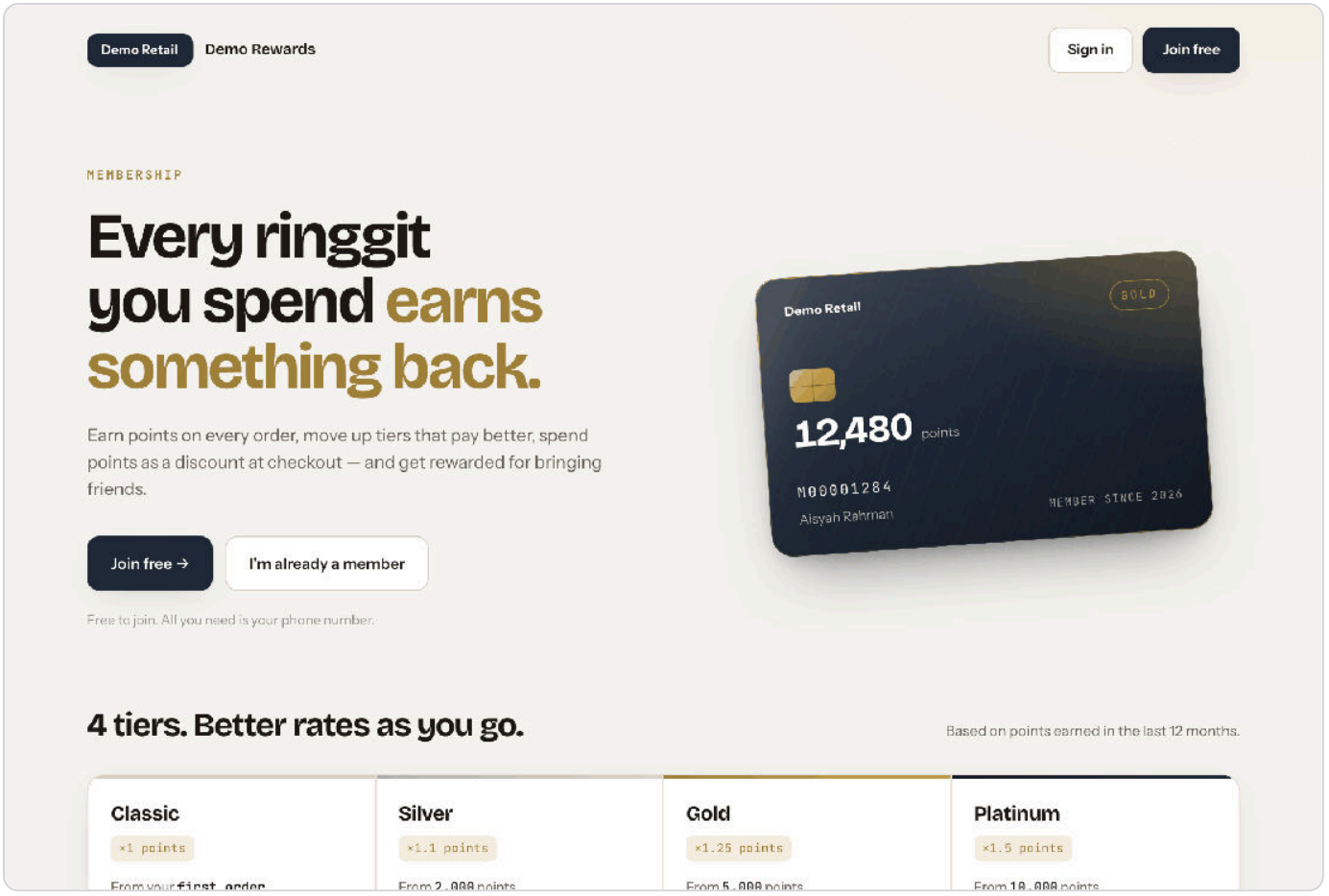

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MEMBERSHIP AND LOYALTY

# What it is for

For: Everyone

Membership and Loyalty is your company's points programme. A customer joins with their phone number and gets a member number. Every paid order earns points. The more points a member earns in the last 12 months, the higher their tier, and a higher tier earns points faster. Members spend points as money off at checkout, and get bonus points for bringing friends.




## Who uses it

- **Member**: a customer. They see their own card, points and history under **My membership**.
- **Staff**: your team. They also see **Overview**, **Members** and **Tiers**, can correct a member's points, and can suspend a membership.
- **Admin**: everything Staff can do, plus changing the tiers and the **Branding** page.

## How the points work

| | How it works |
|---|---|
| Earning | 1 point for every RM1 paid, times the member's tier (for example ×1.25 for Gold). |
| Tiers | Classic from the first order, Silver from 2,000 points, Gold from 5,000, Platinum from 10,000. Only points earned from orders and referrals in the last 12 months count. |
| Spending | 100 points = RM1 off, in whole steps of 100 points. |
| Referrals | When a friend joins with a member's code and pays for their first order, the friend gets 200 points and the member gets 500. |

These are the starting numbers. Tier names and thresholds can be changed on the **Tiers** page; the rest is set by your technical team.

## What it needs from other modules

Members do not earn or spend points in this module. Points are earned and spent where the customer pays: the shop till (Retail POS), the online shop (E-commerce) and the mobile app (SuperApp). Those modules tell Membership about each order. When a member spends points at a till, the approval on their phone goes through the App API server.

## Not ready yet

- Points have a 12-month expiry date, but nothing removes expired points yet. No points expire today.
- There is no screen to make a person Staff or Admin. Ask your technical team.
- Joining on this website has no place to type a friend's referral code. A referral code works only when the friend joins through the till, the online shop or the app.
- The earn rate, the referral bonuses and the 100-points-per-RM1 rate can only be changed by your technical team.

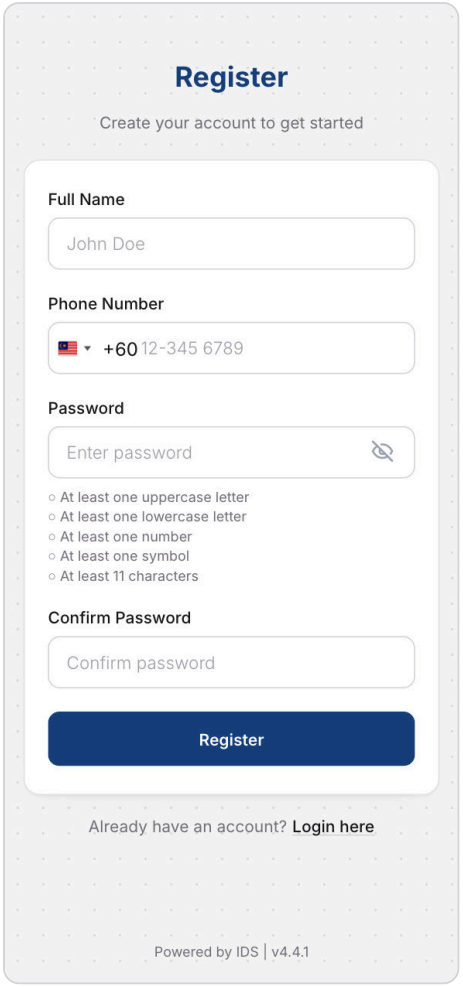
MEMBERSHIP AND LOYALTY

# Join and sign in

For: Members

## Join

1. Open the programme's front page and press **Join free**.
2. Type your **Full Name**, your **Phone Number**, and a **Password** twice. The password needs an uppercase letter, a lowercase letter, a number, a symbol and at least 11 characters.
3. Press **Register**.

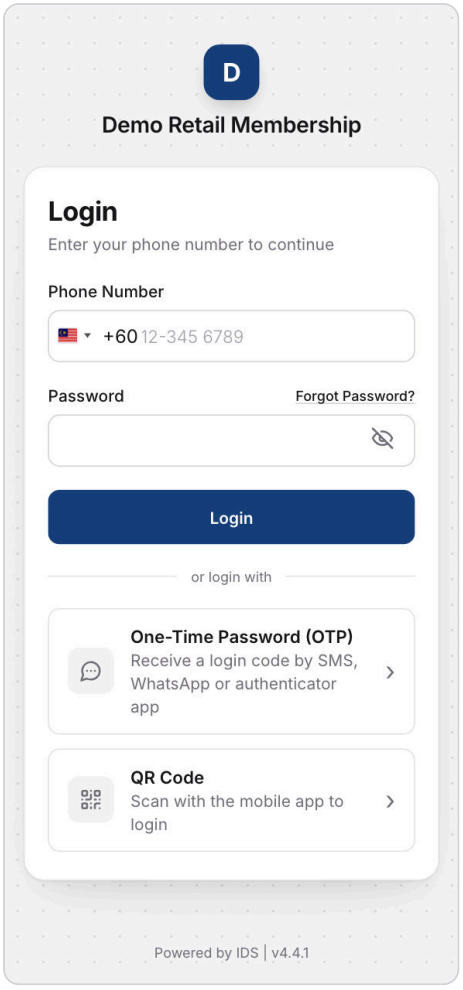



Your phone number is your membership. Your card and member number appear the first time you open **My membership**.

## Sign in

1. Press **Sign in** (or **I'm already a member**) on the front page.
2. Type your **Phone Number** and **Password**, then press **Login**.

You can also sign in with a one-time code sent to your phone (**One-Time Password (OTP)**), or by scanning a **QR Code** with the mobile app.



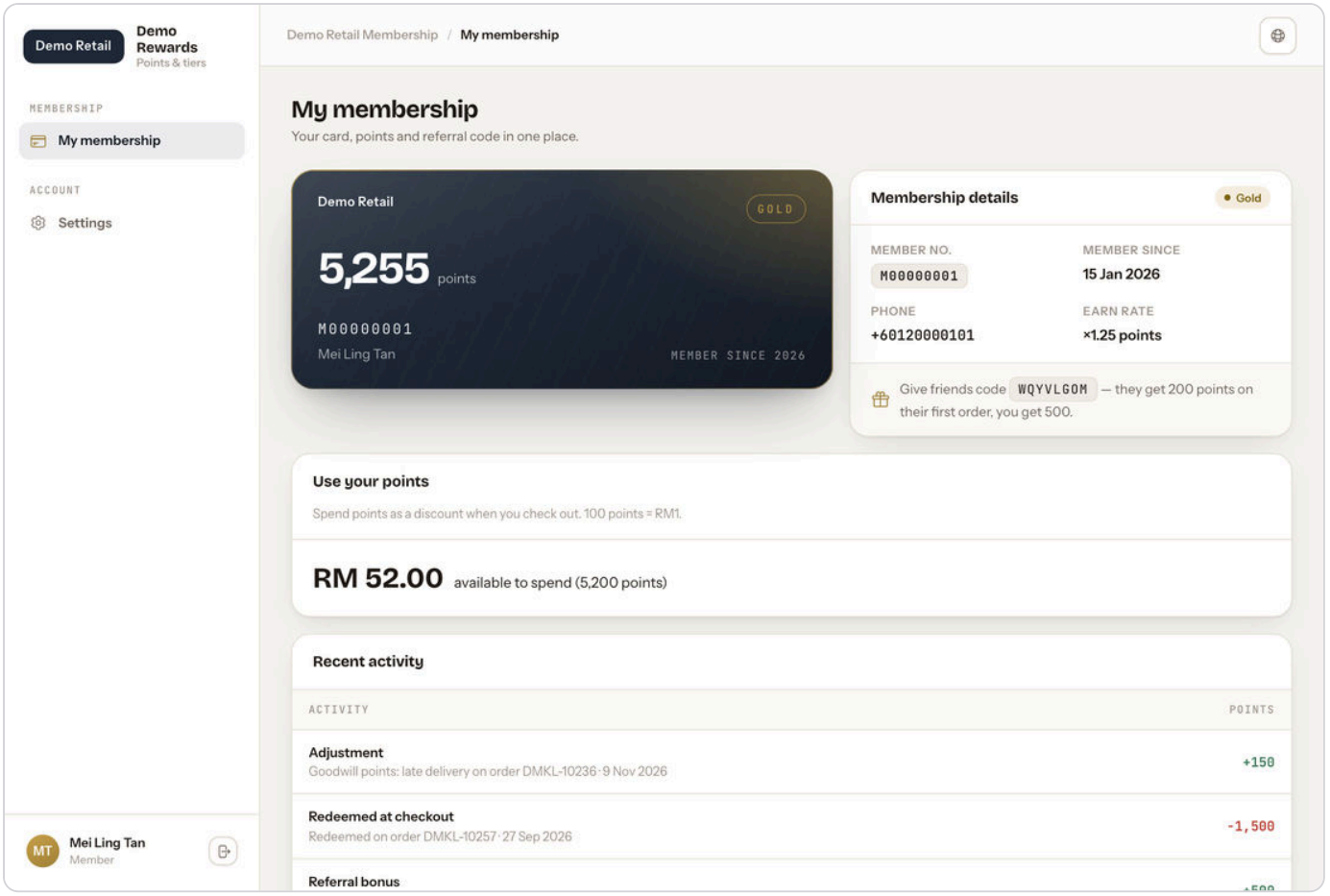

If you forget your password, press **Forgot Password?** on the same page.

Staff sign in the same way, or open the module from the Portal home page.

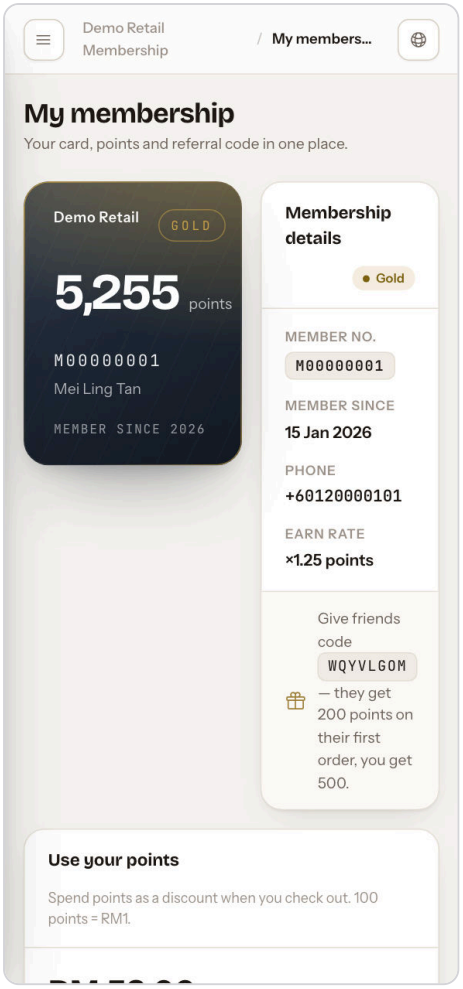
# See your points and card

For: Members

After you sign in you land on **My membership**.




- **The card** shows your points, your member number, your name and your tier (for example **GOLD**).
- **Membership details** shows your **Member no.**, **Member since**, **Phone** and **Earn rate**. An earn rate of ×1.25 means RM100 paid gives you 125 points.
- **Give friends code** is your referral code. When a friend joins with it and pays for their first order, they get 200 points and you get 500.
- **Use your points** shows how much money off your points are worth right now. Points are spent in steps of 100 (100 points = RM1), so a balance of 5,255 points gives RM 52.00 off.
- **Recent activity** lists your last 10 point changes: points earned on an order, points spent, referral bonuses and corrections made by staff.




## If something looks wrong

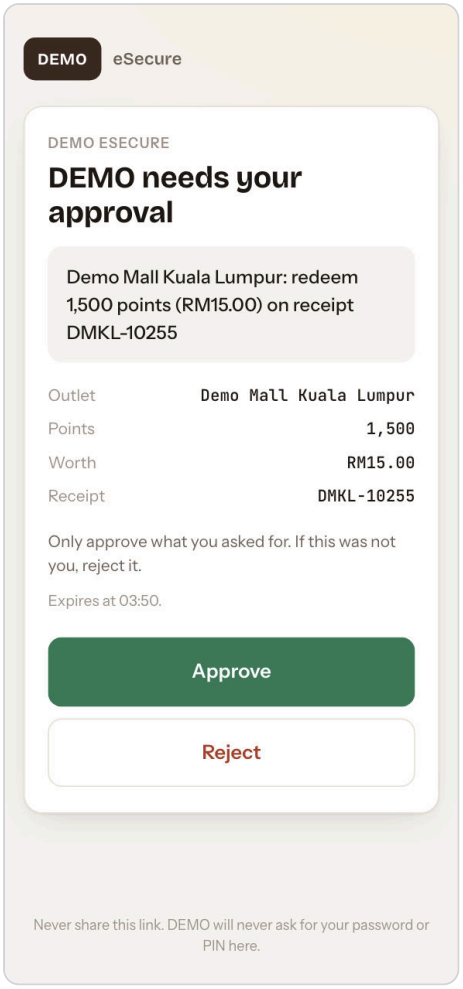
- **"We need your phone number to open your membership"**: your account has no phone number. Ask staff to add it.
- **"Your membership is suspended"**: you cannot earn or spend points until staff reactivate it. Contact your company.
- Points missing for an order: ask staff to check the order. They can add the points by hand.

# Approve spending points at the till

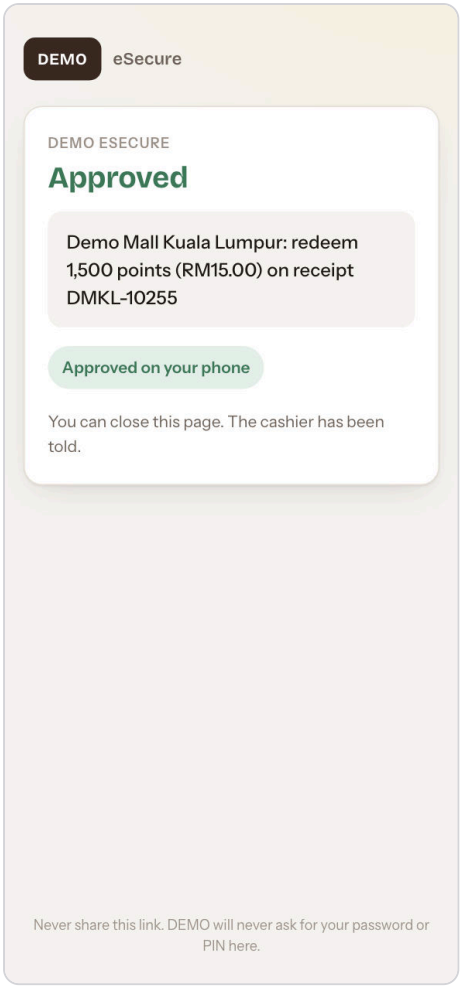
For: Members

When you pay with points at a shop till, the cashier must know it is really you. The till sends an approval request to your phone, called eSecure: a notice in the mobile app, and a WhatsApp message with a button for people without the app.

1. Tell the cashier you want to pay with points. They send the request from the till.
2. Open the WhatsApp message and press its button. A page opens showing the outlet, how many points, what they are worth and the receipt number.
3. Check the details. If they match what you asked for, press **Approve**. If not, press **Reject**.




The page then says **Approved** and the cashier's till is told straight away.

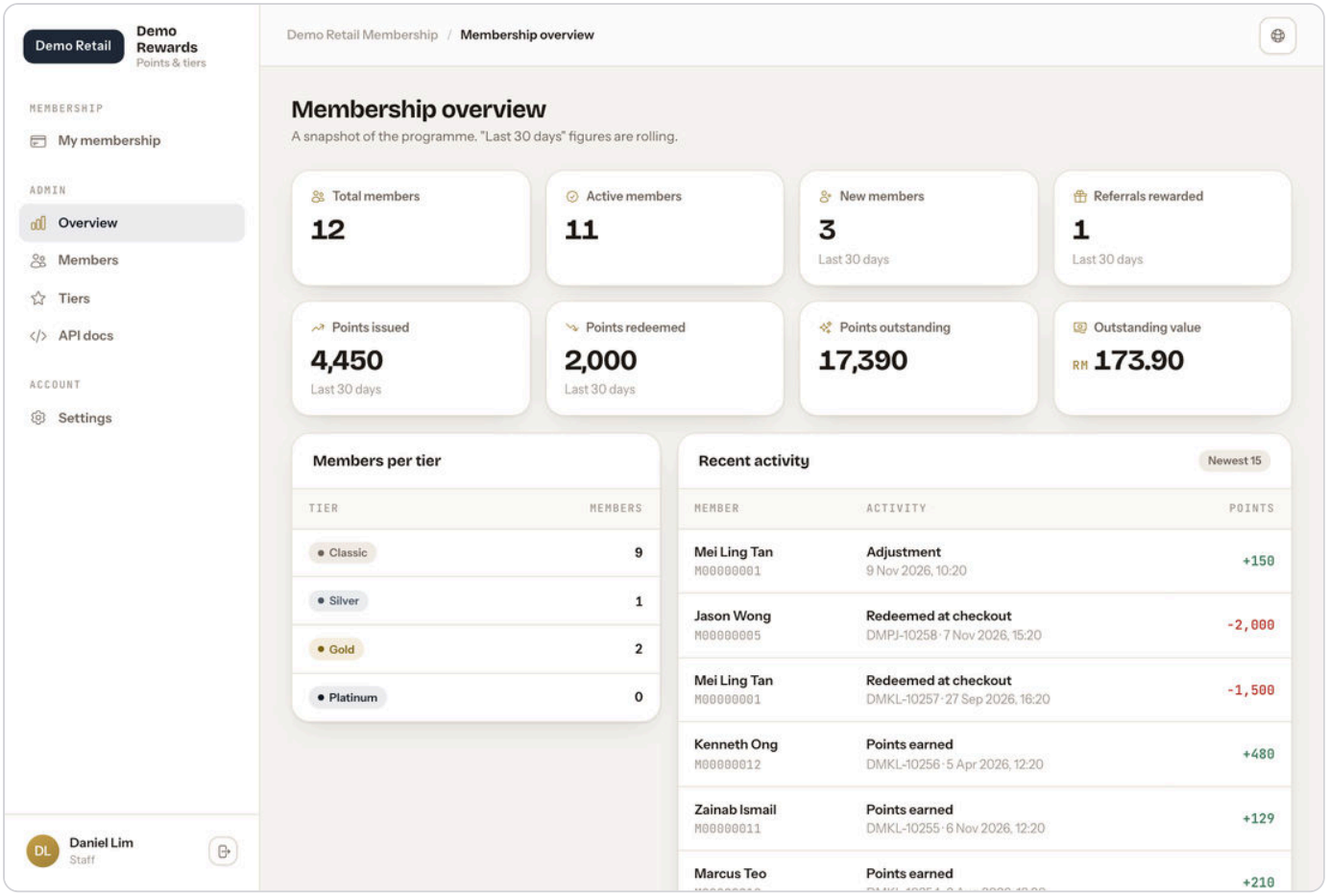



- The request lasts about 2 minutes. If it runs out, ask the cashier to send a new one.
- Never share the link. Your company will never ask for your password or PIN on this page.
- Instead of eSecure, the cashier can send you a one-time code by WhatsApp or SMS for you to read out.

# See how the programme is doing

For: Staff

Open **Overview** in the menu on the left.




The tiles at the top:

| Tile | What it counts |
|---|---|
| **Total members** | Everyone who has joined. |
| **Active members** | Members who are not suspended. |
| **New members** | Joined in the last 30 days. |
| **Referrals rewarded** | Friends who joined with a code and paid for their first order, in the last 30 days. |
| **Points issued** | Points earned from orders and referrals in the last 30 days. |
| **Points redeemed** | Points spent at checkout in the last 30 days (after any returned). |

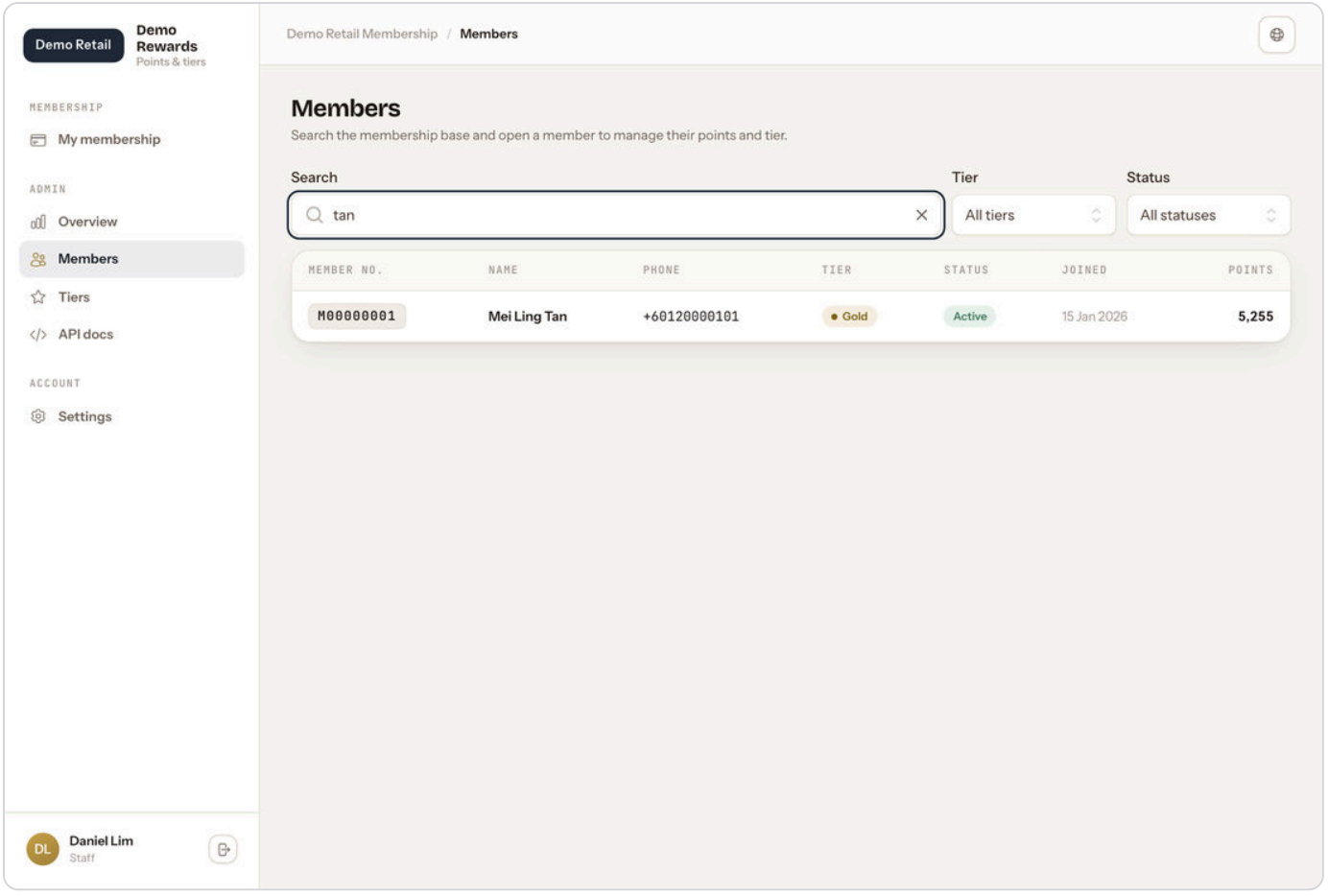
| Tile | What it counts |
| --- | --- |
| **Points outstanding** | Points members hold and have not spent yet. |
| **Outstanding value** | What those points are worth as money off (100 points = RM1). This is what the programme owes members. |

**Members per tier** shows how many members sit in each tier. **Recent activity** shows the 15 newest point changes across all members. Press a member's name to open their page.

# Find a member

For: Staff

1. Open **Members** in the menu on the left.
2. Type in **Search**: part of a name, phone number, member number or email. The list updates as you type.
3. To narrow the list, pick a **Tier** or a **Status** (**Active** or **Suspended**).
4. Press the member number on the left of a row to open that member.



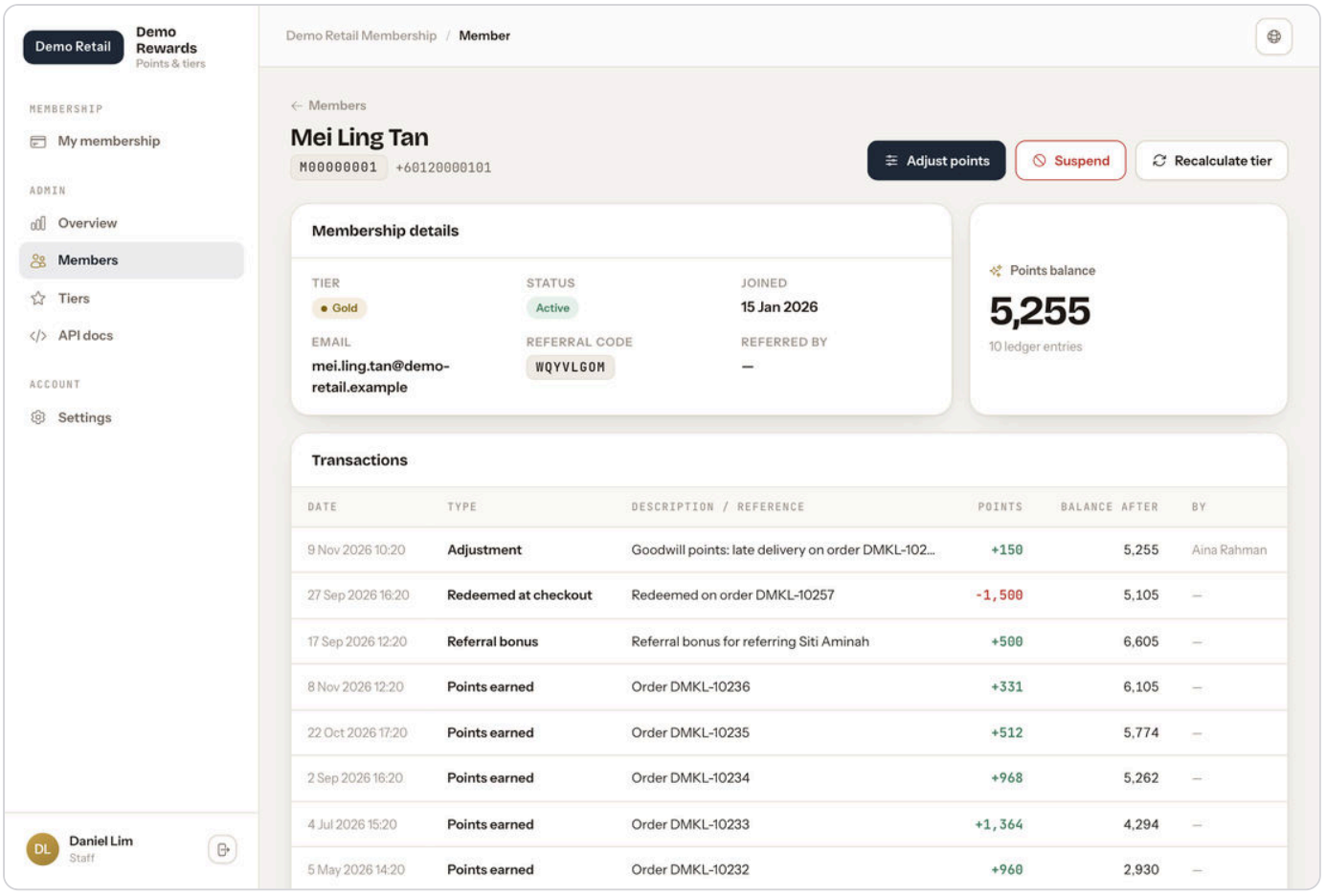

The list shows the newest members first, 25 to a page. **Points** is the member's balance right now.

If nothing matches, the page says **No members match**. Try fewer letters, or set **Tier** and **Status** back to **All tiers** and **All statuses**.

# Correct points, suspend or move a tier

For: Staff

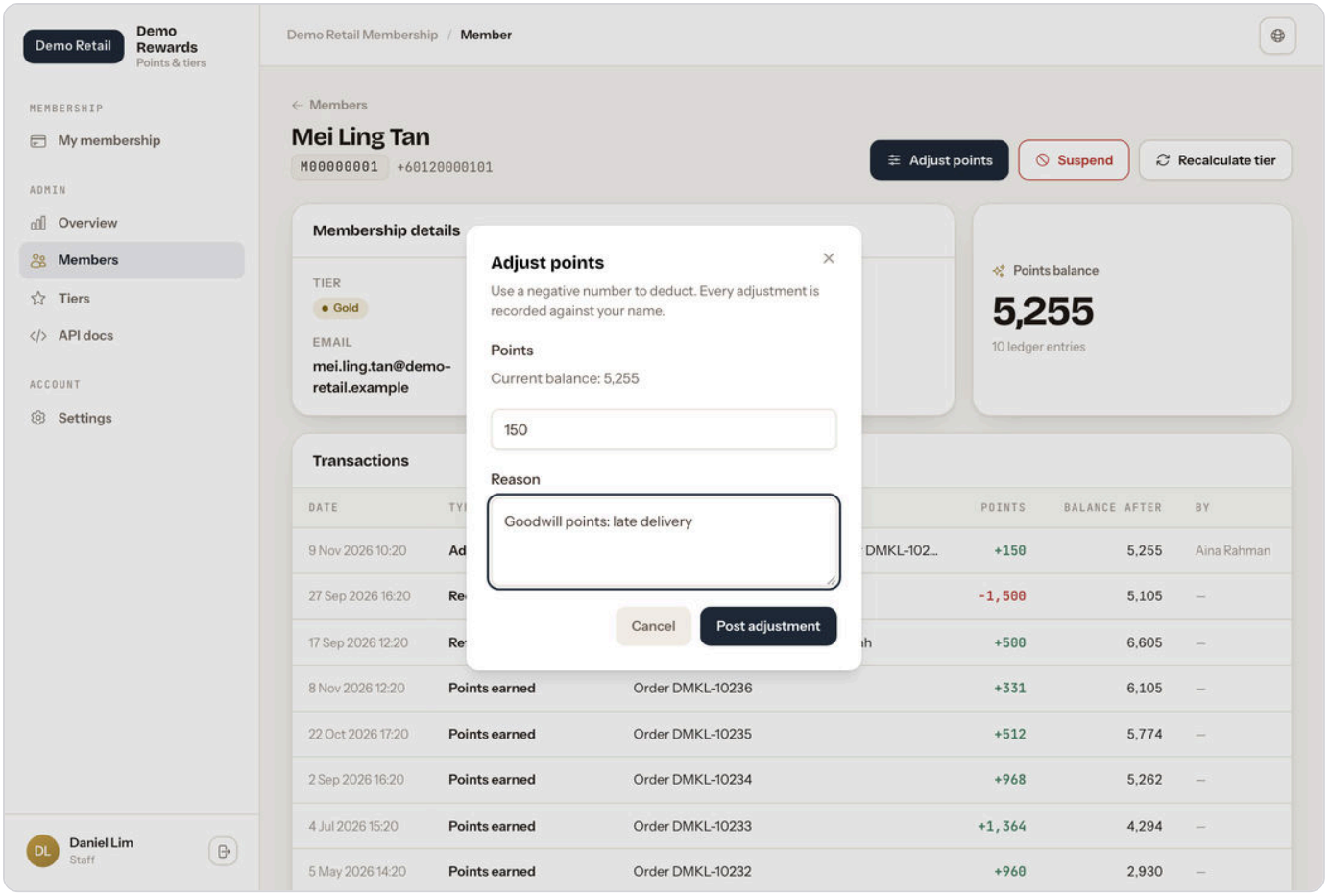
Open a member from **Members**. Their page shows **Membership details**, the **Points balance**, every point change under **Transactions** (with who made it under **By**), and the friends who joined with their code under **Referrals made**.




## Add or remove points by hand

Use this for goodwill points or to fix a mistake.

1. Press **Adjust points** at the top right.
2. In **Points**, type the number to add. To take points away, put a minus in front (for example -100).
3. In **Reason**, say why. The reason is required, and the change is saved under your name.
4. Press **Post adjustment**.




You cannot take away more points than the member has. Points added by hand do not count towards the member's tier.

## Suspend or reactivate a membership

Press **Suspend** and confirm. A suspended member cannot earn or spend points, and their page shows a red notice. To undo it, press **Reactivate**.

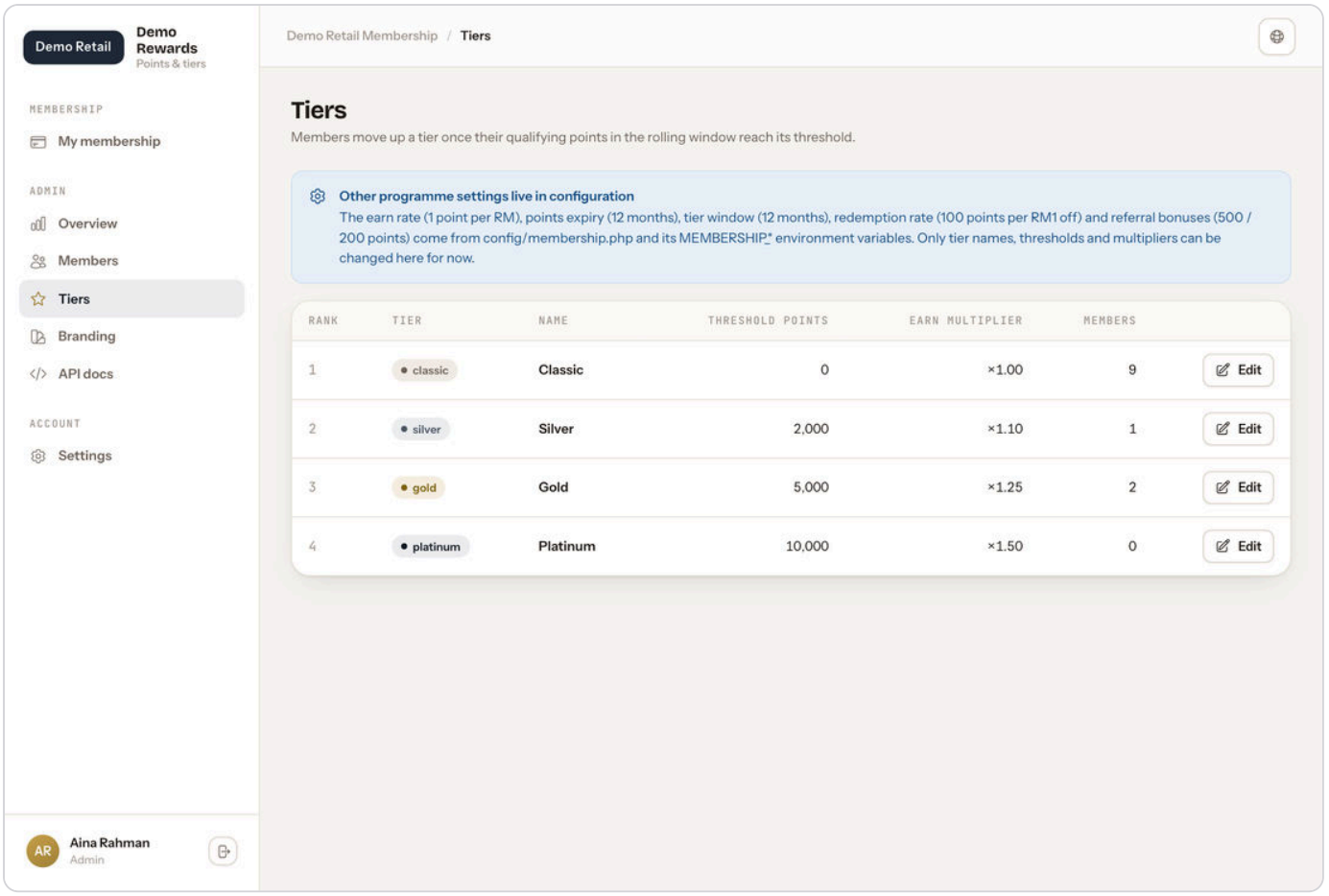
## Recalculate tier

A member's tier is checked again after every paid order. Press **Recalculate tier** to check it now, for example after the tier thresholds were changed. The member can move up or down, depending on the points they earned from orders and referrals in the last 12 months.

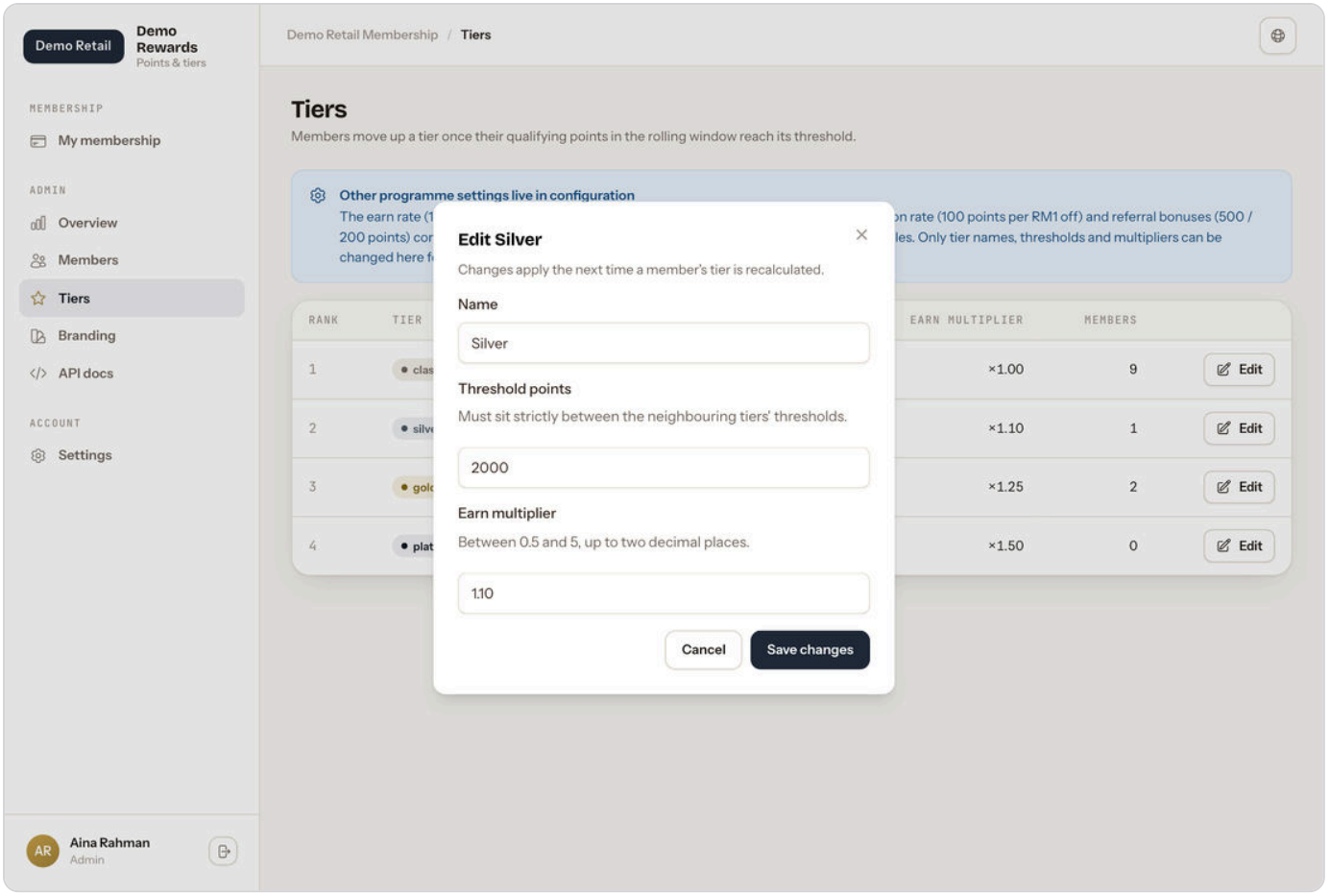
# Change the tiers

For: Administrators

Open **Tiers** in the menu on the left. Staff can see this page. Only an Admin sees the **Edit** buttons.




1. Press **Edit** on the tier you want to change.
2. Change the **Name**, the **Threshold points** (the points needed to reach this tier) or the **Earn multiplier** (between 0.5 and 5; 1.25 means 25% more points).
3. Press **Save changes**.



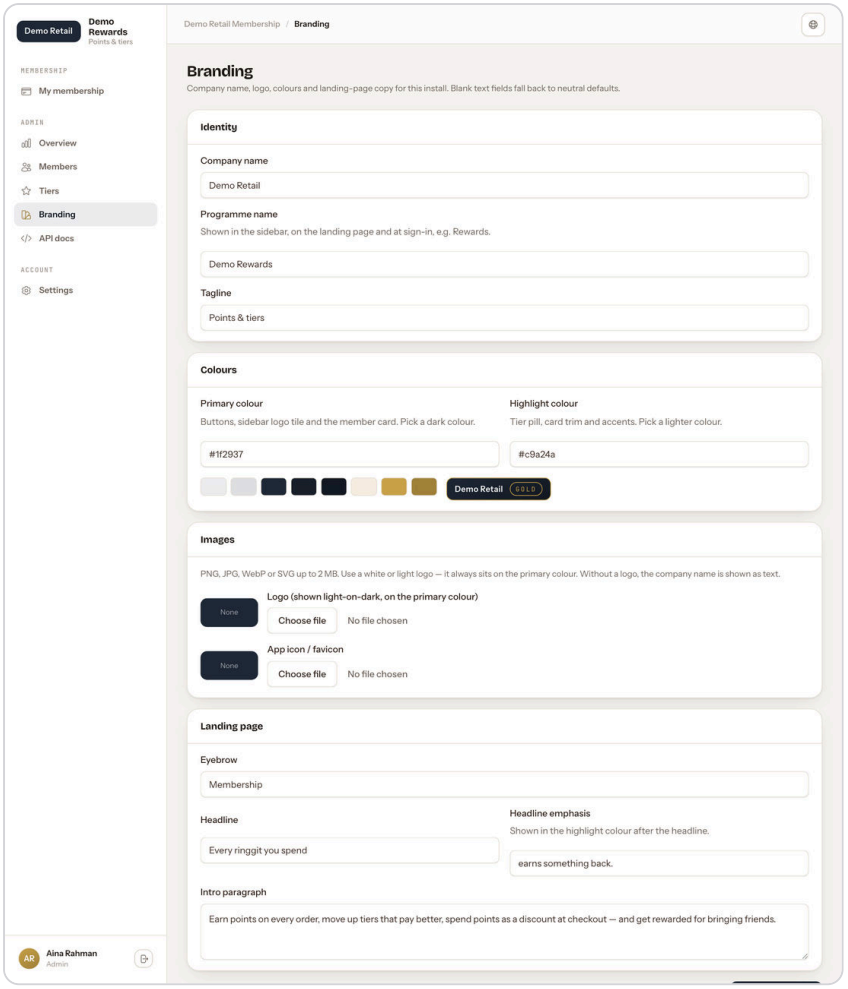

- Each tier's threshold must be higher than the tier below it and lower than the tier above it.
- The first tier always starts at 0 points.
- You cannot add or remove a tier here.
- Members do not move straight away. Each member is moved on their next paid order, or when staff press **Recalculate tier** on their page.

The blue notice at the top lists the settings this page cannot change: the earn rate, how long points last, the 12-month tier window, the 100-points-per-RM1 rate and the referral bonuses. Ask your technical team to change those.

# Set the name, colours and front page

For: Administrators

Open **Branding** in the menu on the left. Only an Admin sees it.




- **Identity**: the **Company name** (shown on the member card), the **Programme name** (shown in the menu, on the front page and at sign-in) and a short **Tagline**.
- **Colours**: the **Primary colour** for buttons and the member card (pick a dark colour), and the **Highlight colour** for the tier label and trims (pick a lighter one). Type the colour code (for example #1f2937). The row of samples below shows the shades made from your two colours, and a small preview of the member card.
- **Images**: a **Logo** and an **App icon / favicon** (the small picture in the browser tab). PNG, JPG, WebP or SVG, up to 2 MB. Use a white or light logo, because it always sits on the primary colour. Without a logo, the company name is shown as text.
- **Landing page**: the words on the public front page. The **Headline emphasis** is shown in the highlight colour after the **Headline**.

Press **Save branding** at the bottom. A text box left empty goes back to the plain starting wording.