Point Rules

Menu: Loyalty / Point Rules

Feature: Loyalty Points

Editions: Cloud

The Point Rules pages enable you to configure how purchases will generate loyalty points.

a) Calculations

POS examines each purchase and its line items to calculate loyalty points. The calculations iterate through each line item in a purchase, and attempts to find the rule(s) that should be used to generate points.

Filters

First, the calculation checks every rule to determine which rules can be applied for the line item:

- It does this by examining the rule's filter fields.
- Filter fields are optional on a rule.
- If the rule specifies a value for a filter field, the purchase line item must match that filter value for the rule to be considered in the points calculation.
- If the rule specifies multiple filter field values, the purchase line item must each of the specified field values.

Priority

The calculation will then take the matching rules, and choose only the rule(s) with the highest priority for use in the calculation.

- Each rule has a priority field.
- Only the rule(s) with the highest priority value will be used in the points calculation.
- There may be multiple rules with the highest priority value; in this case, each of these rules will be used in the points calculation.

© 2025 Kensium LLC

Default Rule

POS provides a default points rule, which has a priority of 0 and no filter fields specified.

This configuration effectively indicates that the rule will be used to calculate points for a purchase line item if no other (higher priority) rules match the purchase line item.

b) Point Rule Fields

General Fields

The Name and Note fields can help you to identify the purpose of the rule. This is particularly helpful if you have a large number of rules to manage.

The Status field indicates whether the rule should be used in calculations.

- Only Published rules are used.
- You can use Draft to indicate the rule has been prepared, but should not be used yet.
- Archived indicates the rule is no longer used, and has been archived for historical purposes.

Finally the Priority field indicates when the rule should be chosen when there are other potential rules that match a given purchase line. See Priority above for a description of this logic.

Points Generated

Supply an Amount field to indicate how many points will be generated when the rule matches a given purchase line item.

This value is a ratio, indicating how many points should be generated for every dollar of the purchase line's amount.

For example, if the Amount field is set to 25, and the purchase line amount was $3.00, the calculated loyalty points would be 75.

Purchase Rule Filters

These filter fields are used to determine if the rule should be applied to a purchase line, by examining the line's underlying purchase information.

- Start Date
- Apply the rule only if the purchase date is greater than this value.
- End Date
    - Apply the rule only if the purchase date is less than this value.
- Location

© 2025 Kensium LLC

    - Apply the rule only if the purchase was made at this location.
- Location Group
    - Apply the rule only if the purchase was made at a location within this location group.
- Order Type
    - Apply the rule only if the purchase's order type matches this value.
    - Order types are defined by the purchase sources (they are not managed within POS).

Line Rule Filters

These filter fields are similar to purchase rule filters, except that they are used to examine a purchase line itself.

- Item SKU
    - Apply the rule only if the item SKU matches this value.
- Break Quantity
    - Apply the rule only if the item quantity meets or exceeds this value.
- UOM
    - Apply the rule only if the item UOM matches this value.
    - This filter field is typically only used when Break Quantity is also used.
- Product Price Class
    - Apply the rule only if the item has a product price class that matches this value.
- Vendor
    - Apply the rule only if the item has a vendor that matches this value.

© 2025 Kensium LLC