DealerBuilt

ENTERPRISE RETAIL CLOUD
VIP PROGRAM SETUP
USER GUIDE

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1. Overview

The Customer VIP Program in Lightyear DMS allows dealerships to track and reward customer loyalty based on their service and parts purchase history. When a customer brings their vehicle in for service, the system automatically calculates VIP points based on the total cost of labor, parts, and sublet charges on each repair order.

Points are accumulated over time and can be redeemed for discounts, free services, or other rewards as determined by the dealership. The VIP program integrates with the Customer Master, Repair Order, Counter Sales, and Comments modules to provide a seamless loyalty tracking experience.

Key Features:

- **Automatic Points Calculation:** Points are calculated based on a customizable formula applied to repair order charges (labor, parts, and sublet costs).
- **Department Selection:** Choose which departments (Parts, Service, etc.) participate in the VIP program.
- **Points Tracking:** Track Points Earned, Points Redeemed, Bonus Points, and Points Remaining through the Comments screen.
- **Invoice Display:** VIP points are printed on customer invoices, keeping customers informed of their loyalty rewards.
- **VIP Customer Search View:** Quickly filter and view all VIP customers and their points balances using the dedicated VIP Cust search view.
- **Alert Notifications:** Set alerts on VIP customer records so staff are immediately notified when a VIP customer is pulled up.

2. Prerequisites and Initial Setup

Before configuring the VIP Program, you need to ensure that the appropriate customer categories are set up in the Dropdown List Setup. This allows you to classify customers as VIP, GOLD, PLATINUM, or any other tier your dealership uses.

Setting Up Customer Categories

Step 1: From the **Customer Master** window, click **Options**.

Step 2: Select **"Dropdown List Setups"** from the Options menu.

Step 3: In the Dropdown List Setup window, select the **"Customer"** group tab.

Step 4: Select the **"Cust Categories"** list.

- When making an update to an existing Cust Category or adding a new Cust Category the user must log out and log back in to see the updated category list.

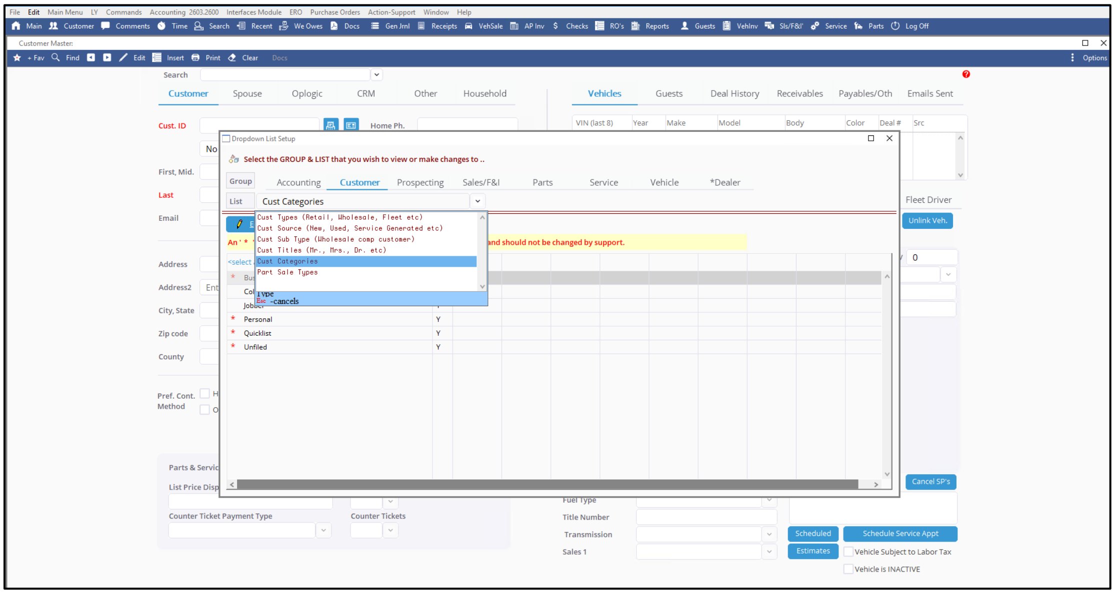


Figure 1: Dropdown List Setup showing Customer Categories (GOLD, PLATINUM, VIP)

The system comes with default categories, but you can add or modify them as needed. Common VIP tiers include VIP, GOLD, and PLATINUM. Each customer can then be assigned one of these categories in their Customer Master record.

> **TIP**
>
> The customer categories defined here will appear in the Category dropdown on the Customer Master screen. For the VIP calculation to work the category of “VIP” must be assigned in the Customer Master window.

3. Setting Up the VIP Program Formula

The VIP Program uses a points calculation formula to determine how many points a customer earns per repair order. This formula is configured at the system level and applies to all VIP customers.

Accessing the VIP Program Setup

Step 1: Open the **Customer Master** window.

Step 2: Click **Options**.

Step 3: Select **"Setup Customer VIP Program"** from the menu.

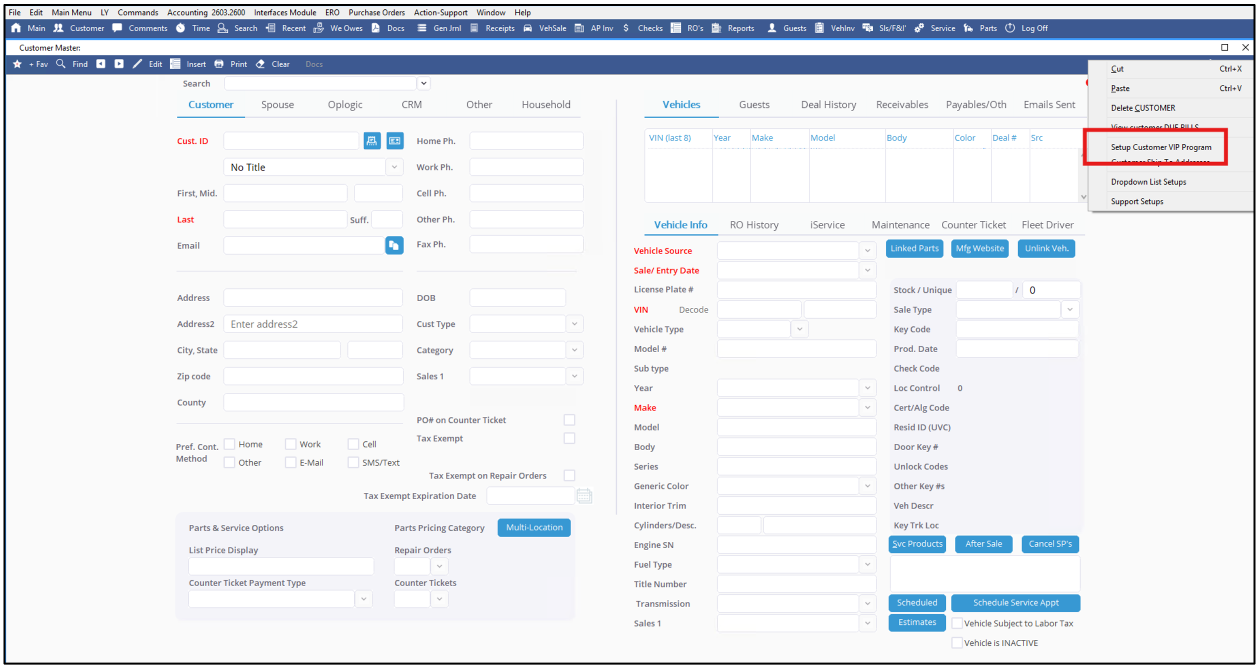
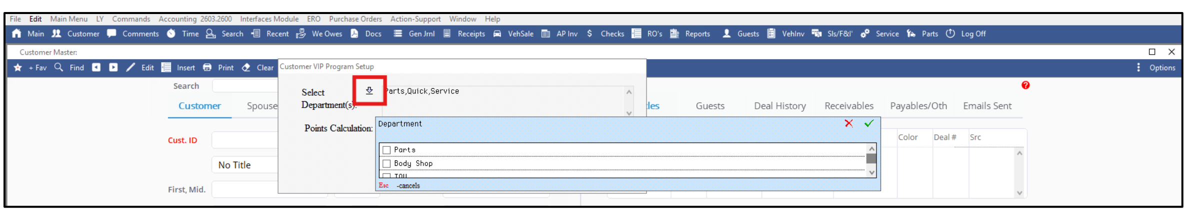


Figure 2: Options menu showing 'Setup Customer VIP Program' option

Configuring the VIP Program

The Customer VIP Program Setup dialog has two key fields:

Step 4: Select Department(s): Choose which departments participate in VIP point accumulation. Click the department selector icon to pick from available departments. In the example shown, **Parts, Quick** and **Service** are selected.



Step 5: Points Calculation: This field contains the formula used to calculate points. The default formula is:

```
rnd(SL.sIRO.LaborCP+SL.sIRO.PartsCP+SL.sIRO.SubletCP,0)*0.1
```

Formula Breakdown:

- **SL.sIRO.LaborCP** = Customer-pay labor charges on the repair order
- **SL.sIRO.PartsCP** = Customer-pay parts charges on the repair order
- **SL.sIRO.SubletCP** = Customer-pay sublet charges on the repair order
- **rnd(...,0)** = Rounds the total to a whole number
- ***0.1** = Multiplier that converts dollars to points (10% of total spend becomes points)

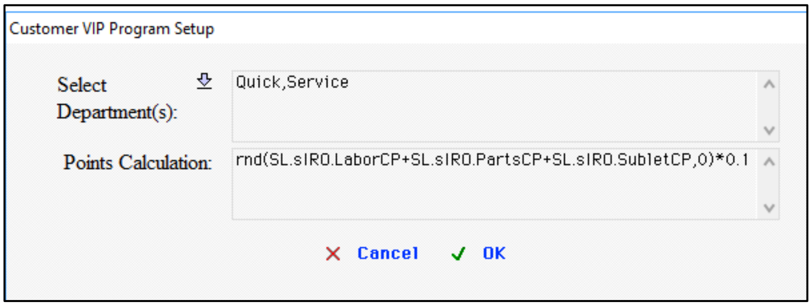


Figure 3: Customer VIP Program Setup dialog with department selection and points formula

Step 6: Click **OK** to save the VIP Program configuration.

> **NOTE**
> The multiplier value (0.1 in the default formula) can be adjusted to change the earning rate. For example, changing to *0.2 would be awarded 20% of the total spend as points instead of 10%.

4. Enrolling a Customer in the VIP Program

To enroll a customer in the VIP Program, you need to set their customer category to VIP in their Customer Master record.

Step 1: Open the **Customer Master** for the customer you want to enroll.

Step 2: Locate the **Category** field in the lower-left area of the Customer Master screen.

Step 3: Set the Category to **"VIP"** using the dropdown selector.

Step 4: Save the customer record.

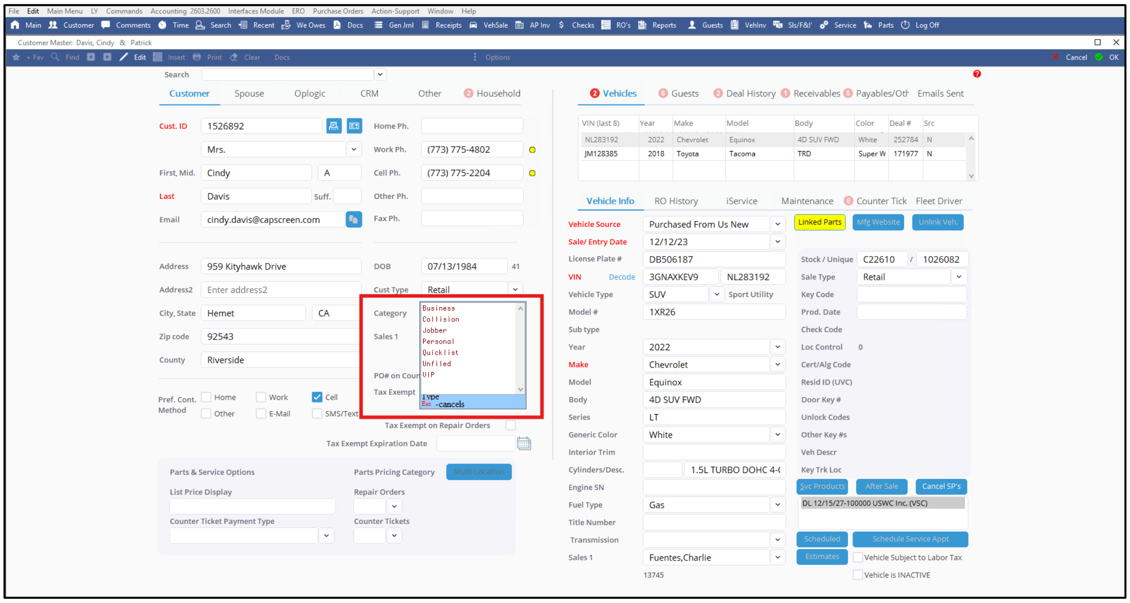


Figure 4: Customer Master record showing Category set to 'VIP'

Once the Category is set to VIP, the system will begin tracking and calculating VIP points for that customer on all future repair orders and counter sales transactions in the selected departments. The customer's name will also appear in the VIP Customer search view.

> **TIP**
>
> You can also use the Customer Search to find existing customers and update their category in bulk. Look for the Category column in the search results to quickly identify which customers are already enrolled.

5. Viewing and Managing VIP Points

VIP points are tracked and displayed through the Comments screen. When a customer is enrolled in the VIP program, accessing their comments will display a VIP section at the bottom of the screen showing their points summary.

Accessing the VIP Points Summary

Step 1: Open the customer record in **Customer Master**.

Step 2: Click the **Comment** button in the toolbar or navigate to the Comments screen from the top menu bar.

Step 3: The Comments screen will open with the title showing the customer's name followed by **"*** VIP ***"** to indicate VIP status.

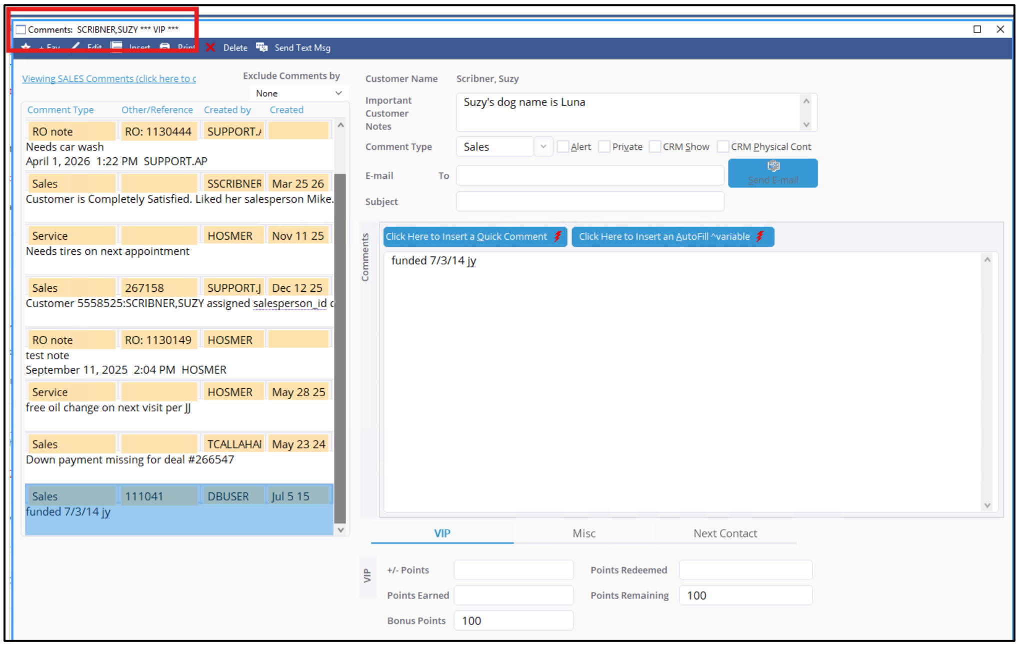


Figure 5: Comments screen showing VIP points summary at the bottom

VIP Points Fields:

Field	Description
+/- Points	Manual adjustment field - enter a positive or negative number to add/subtract points
Points Earned	Total cumulative points earned from all qualifying repair orders and transactions
Points Redeemed	Total points that have been redeemed by the customer
Bonus Points	Any bonus points manually awarded to the customer
Points Remaining	Current available balance (Earned + Bonus - Redeemed)

6. Redeeming and Adjusting Points

When a customer wants to redeem their VIP points, the process is handled through the Comments screen. Staff can enter the number of points being redeemed, and the system will automatically update the Points Remaining balance.

Redeeming Points

Step 1: Open the customer's **Comments** screen (the VIP section will be visible at the bottom), click **Edit** to update any of the fields in the VIP section

Step 2: In the **"Points Redeemed"** field, enter the number of points the customer is redeeming.

Step 3: The **"Points Remaining"** field will automatically recalculate.

Step 4: Click **OK** to save the changes.

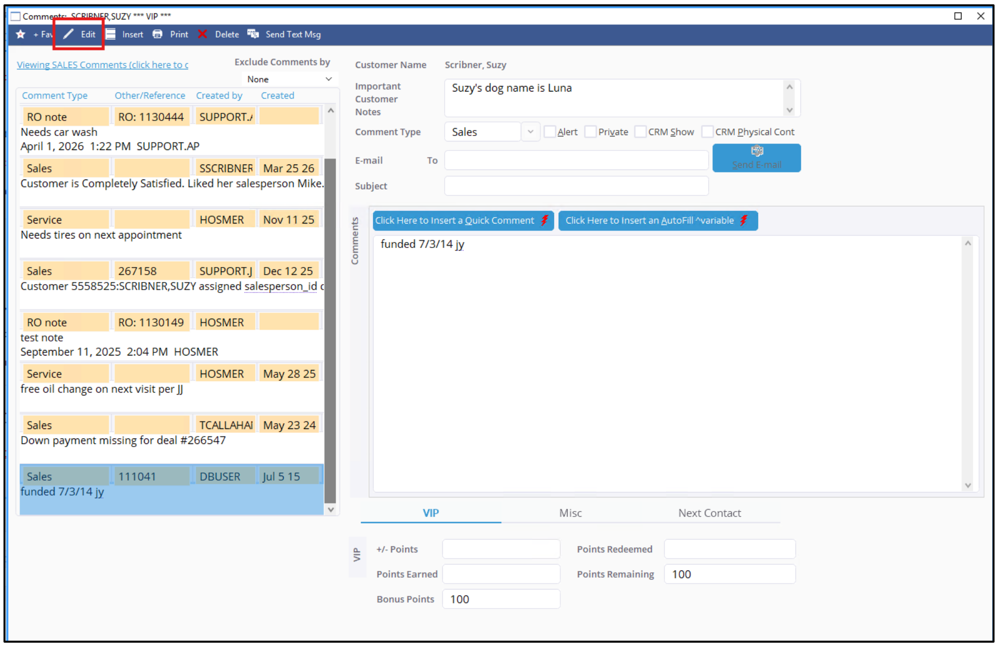


Figure 6: Entering 100 points in the Points Redeemed field

Manual Point Adjustments

To manually add or subtract points (for example, as a goodwill gesture or to correct an error), use the "+/- Points" field. Enter a positive number to add points or a negative number to subtract points. This adjustment will be reflected in the Bonus Points total.

> **IMPORTANT**
>
> Always document the reason for manual point adjustments in the Comments area of the record. This creates an audit trail and helps other staff understand why the adjustment was made.

7. Adding VIP Alerts and Comments

To ensure staff are immediately aware when interacting with a VIP customer, you can set up alert comments that pop up whenever the customer record is accessed.

Step 1: Open the customer's **Comments** screen.

Step 2: Click **Insert** to create a new comment.

Step 3: Check the **Alert** checkbox to make this comment appear as a popup alert.

Step 4: In the Comment area, type a message such as **VIP CUSTOMER**.

Step 5: You can also use **Click Here to Insert a Quick Comment** for standardized messages.

Step 6: Click **OK** to save.

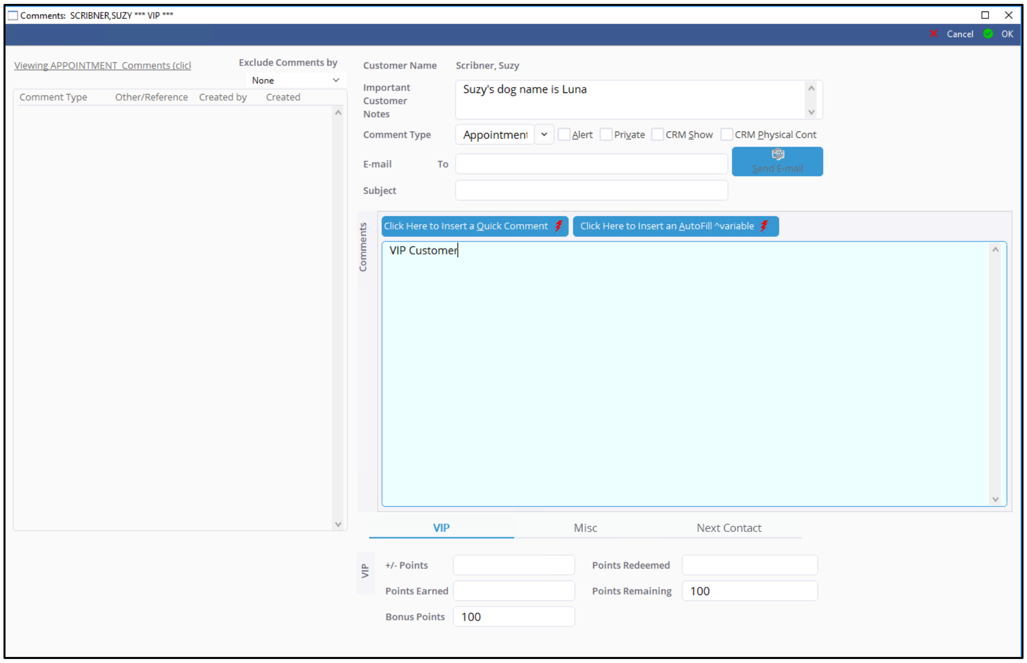


Figure 7: Creating a VIP CUSTOMER alert comment with the Alert checkbox enabled

When the Alert checkbox is enabled, the comment text will pop up as a notification any time a user opens this customer's record, ensuring that all staff members are aware of the customer's VIP status and can provide appropriate service.

8. VIP Points on Repair Orders and Invoices

Once a customer is enrolled in the VIP program, their VIP status and points information will appear on Repair Orders and printed Customer Invoices.

Repair Order Write-Up

When opening a Repair Order for a VIP customer, you will see a "** VIP **" indicator in the RO header area. This immediately identifies the customer as a VIP member.

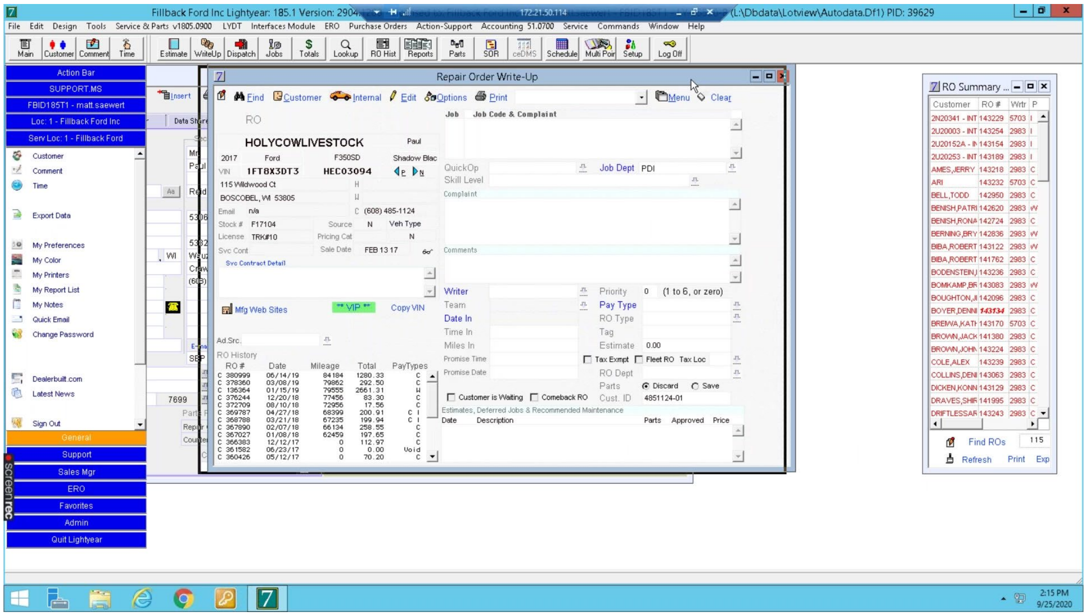


Figure 8: Repair Order Write-Up showing VIP indicator and customer service history

Customer Invoice

When a repair order is closed and a Customer Invoice is printed, the VIP points information is displayed at the bottom of the invoice. This shows the customer their current points balance and how many points were earned on the current visit.

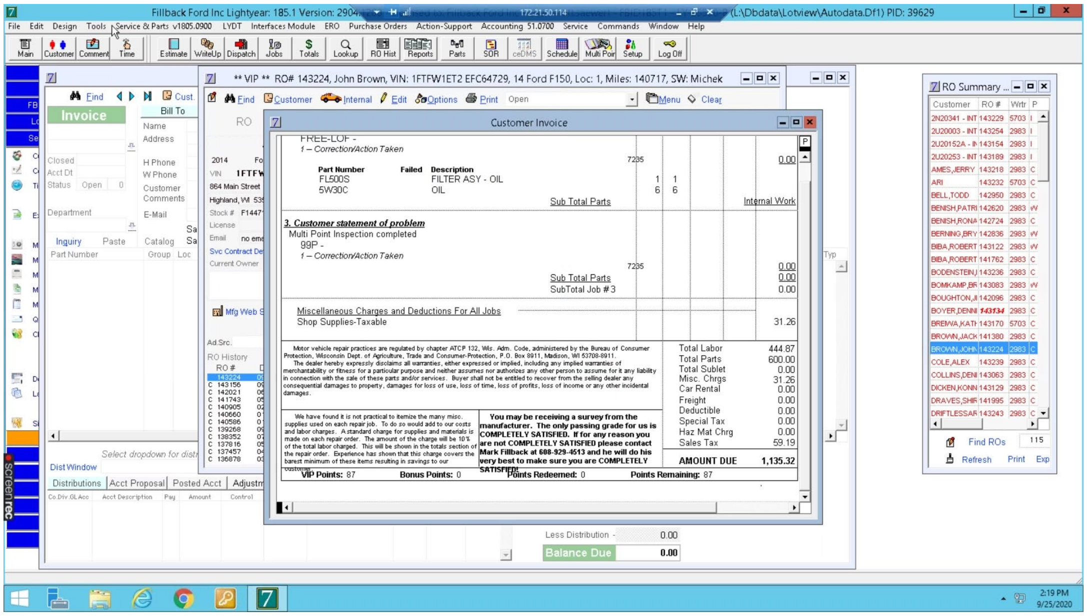


Figure 9: Customer Invoice showing VIP Points: 87, Bonus Points: 0, Points Redeemed: 0, Points Remaining: 87

The invoice footer displays: VIP Points (earned this visit), Bonus Points, Points Redeemed, and Points Remaining. This transparency helps reinforce the value of the VIP program to the customer.

9. Using the VIP Customer Search View

Lightyear provides a dedicated VIP Customer search view that allows you to quickly see all VIP customers and their current points balances.

Accessing the VIP Search View

Step 1: Open the **Customer Search** screen (click Customer in the main toolbar or use Find).

Step 2: Click the **"VIP Cust"** button on the right side of the search panel.

Step 3: The search results will now display VIP-specific columns.

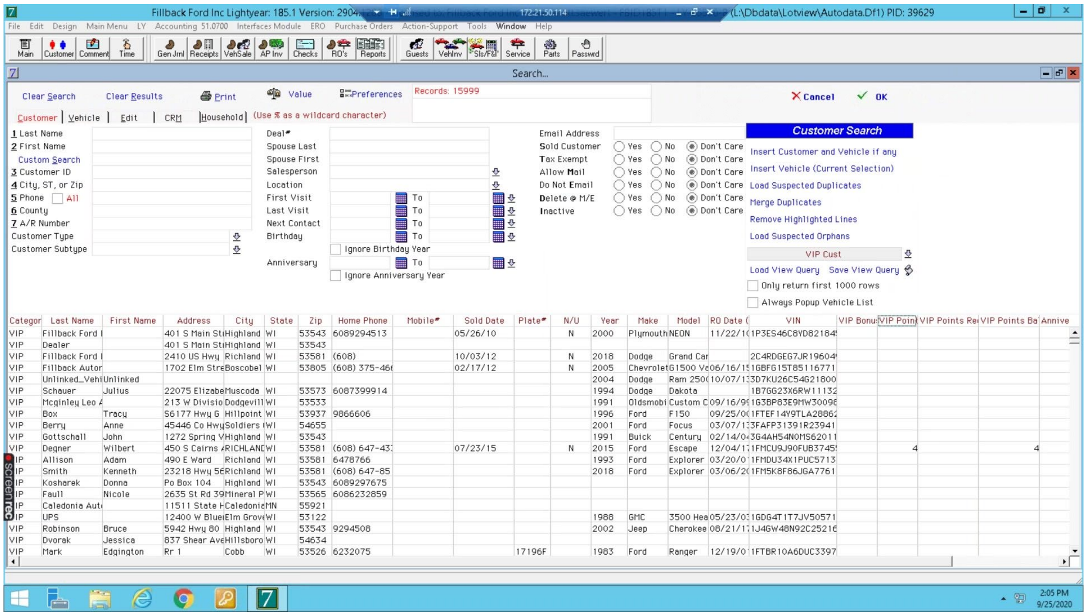


Figure 10: Customer Search with VIP Cust view showing points columns for all VIP customers

VIP Search Columns:

Column	Description
VIP Bonus	Bonus points balance for the customer
VIP Points	Total VIP points earned
VIP Points Rev	Points from revenue/transactions
VIP Points Ba	Current points balance (remaining)
Anniversary	Customer anniversary date (for targeted promotions)

Customizing the VIP Search View

The VIP Cust view can be customized through Customer Views configuration. To modify which columns, appear and their order, access the Customer Views editor and select the "VIP Cust" view.

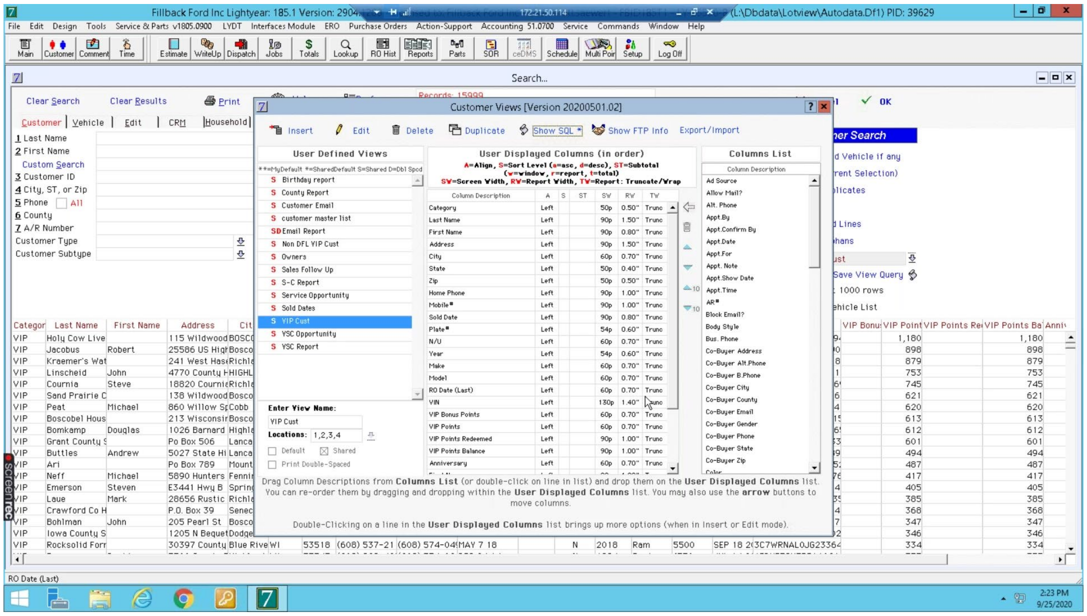


Figure 11: Customer Views configuration for the VIP Cust search view

10. Customer Value Report

The Customer Value feature provides a comprehensive view of a customer's total service history and lifetime spend at the dealership. This is accessed by clicking the "Value" button in the Customer Search toolbar.

The Customer Value report shows a breakdown of service totals by department, including customer-pay labor, customer-pay parts, service contract totals, warranty totals, and overall service totals. This data helps dealerships identify their most valuable customers and make informed decisions about VIP tier assignments.

11. Service Comments and VIP History

The Comments screen for VIP customers can also be toggled to show Service-specific comments. This provides a history of service notes, reminders, and important instructions related to the customer's vehicles.

Step 1: On the Comments screen, click **"click here to change view"** at the top to toggle between General and Service comments.

Step 2: The Service view shows all service-related comments with dates and who created them.

Step 3: The VIP points summary remains visible at the bottom regardless of which view you are in.

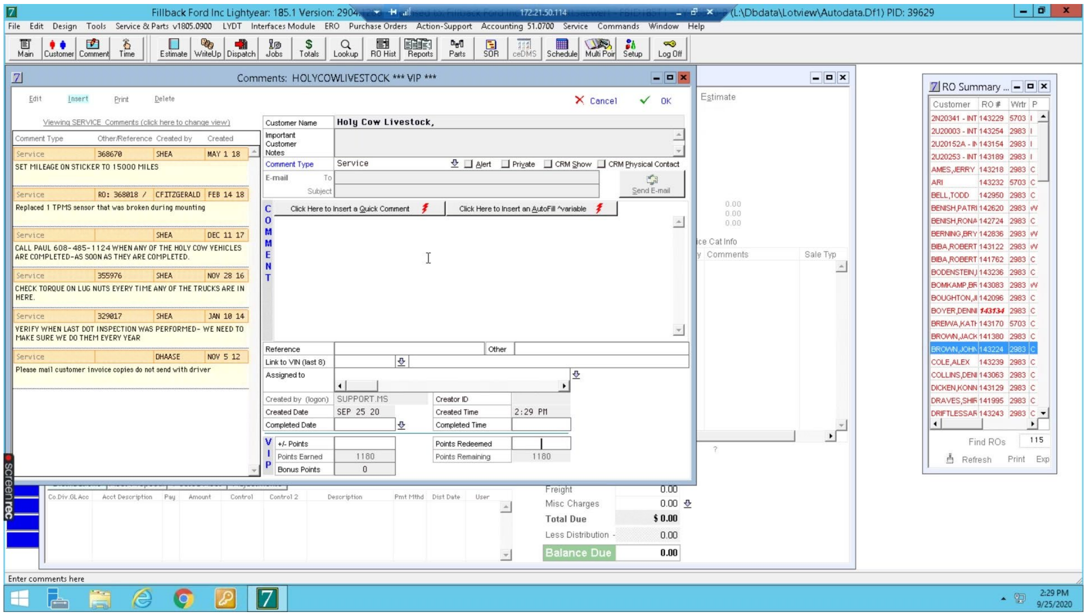


Figure 12: Service Comments view showing service history notes with VIP points still visible at the bottom

12. Tips and Best Practices

1. Always set up customer categories first
Before enrolling customers, ensure your category tiers (VIP, GOLD, PLATINUM) are configured in Dropdown List Setup under the Customer group.

2. Use Alert Comments for VIP customers
Create an alert comment with text like 'VIP CUSTOMER' so that every staff member who opens the customer record is immediately notified of their VIP status.

3. Review the points formula periodically
The points calculation formula determines the earning rate. Work with management to ensure the multiplier provides meaningful rewards without being too generous or too stingy.

4. Train front-line staff on point redemption
Service advisors and parts counter staff should know how to check a customer's points balance and process redemptions through the Comments screen.

5. Use the VIP Cust search view regularly
The VIP search view gives you a quick dashboard of all VIP customers and their points. Use it to identify customers approaching reward thresholds for proactive outreach.

6. Document all manual adjustments
When using the +/- Points field for manual adjustments, always add a comment explaining the reason. This creates an audit trail.

7. Check VIP status on Repair Orders
When writing up a Repair Order, look for the ** VIP ** indicator. This reminds service advisors to mention the loyalty program and current points to the customer.

8. Leverage Customer Value reports
Use the Customer Value feature to identify high-spending customers who are not yet in the VIP program and consider enrolling them.

For questions or additional support, contact the DealerBuilt Support Team.
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