

Quick Setup Checklist — Launch Your Loyalty Program in 5 Steps

What Is This?

This is your fast-track checklist to get your loyalty program up and running. If you prefer action over reading, follow these five steps and you'll be ready to start rewarding customers today.

Real-Life Example

Siti just signed up for Pixalink to launch a loyalty program for her bubble tea shop. She didn't want to spend hours reading guides — she wanted to get started right away. By following this checklist during her lunch break, Siti had her loyalty program live before the afternoon rush. Her first customer earned points that same day and redeemed a free topping by the weekend.

The 5-Step Checklist

Step 1: Create Your Space

A Space represents your business location — your shop, cafe, or outlet. Every loyalty program needs at least one.

Go to **Admin Panel** → **General** → **Spaces** and click **New Space**. Give it your business name, add your address, and upload your logo.

Time needed: 2 minutes

[Read the full guide: How to Create a Space](https://kb.pixalink.io/articles/how-to-create-a-space) (https://kb.pixalink.io/articles/how-to-create-a-space)

Step 2: Create Your First Reward

Rewards are what keep customers coming back. Start with something simple — a free drink, a discount, or a bonus item.

Go to **Admin Panel** → **Loyalty Program** → **Rewards** and click **New Reward**. Set a name, the number of points needed to redeem it, and add an image.

Time needed: 3 minutes

[Read the full guide: What Are Rewards and How to Create Them](https://kb.pixalink.io/articles/what-are-rewards-and-how-to-create-them) (https://kb.pixalink.io/articles/what-are-rewards-and-how-to-create-them)

Step 3: Set Your Point Earning Rules

Decide how customers earn points. For example, "spend RM1, earn 1 point" is a popular starting rule.

Your point earning rules are set up during onboarding. If you need to change them, reach out to our support team.

Time needed: 2 minutes

[Read the full guide: How to Set Up Tier Point Multipliers](https://kb.pixalink.io/articles/how-to-set-up-tier-point-multipliers) (https://kb.pixalink.io/articles/how-to-set-up-tier-point-multipliers)

Step 4: Connect WhatsApp

WhatsApp lets you send reward notifications, birthday messages, and promotions directly to your customers' phones. This is optional but highly recommended — it's the easiest way to stay in touch.

Follow the linked guide below to connect your WhatsApp Business account. The setup is done through **Admin Panel** → **Settings** → **Configurations** (this page appears in the menu once your WhatsApp credentials are configured).

Time needed: 5 minutes

[Read the full guide: How to Connect Your WhatsApp Business Account](https://kb.pixalink.io/articles/how-to-connect-your-whatsapp-business-account) (https://kb.pixalink.io/articles/how-to-connect-your-whatsapp-business-account)

Step 5: Share Your Customer Portal

Your Customer Portal is where customers sign up, check their points, and redeem rewards. Share the link or QR code so people can start joining.

Go to **Admin Panel** → **Loyalty Program** → **Customer Portal Design** and click **Show Customer Portal QR Code**. Download the QR code and display it at your counter or print it on your receipts.

Time needed: 1 minute

[Read the full guide: What Is the Customer Portal and How to Set It Up](https://kb.pixalink.io/articles/what-is-the-customer-portal-and-how-to-set-it-up) (https://kb.pixalink.io/articles/what-is-the-customer-portal-and-how-to-set-it-up)

You're Live!

That's it — your loyalty program is ready. Here's what to do next:

- **Record your first transaction** — when a customer makes a purchase, go to **Admin Panel** → **Loyalty Program** → **Record Points** to award their points

- **Tell your staff** — make sure your team knows how to record points and redeem rewards
- **Spread the word** — put the QR code at your counter, on your menu, and in your social media posts

Good to Know

- You can always come back and add more rewards, change your point rules, or customise your portal later
- WhatsApp is optional — your loyalty program works without it, but you'll miss out on automated notifications
- If you have multiple outlets, create one Space per location

Need Help?

Reach out to our support team — we're happy to help you get started.

What's Next?

- [How to Record Points for a Customer](https://kb.pixalink.io/articles/how-to-record-points-for-a-customer) (https://kb.pixalink.io/articles/how-to-record-points-for-a-customer)
- [How to Customise Your Customer Portal Theme](https://kb.pixalink.io/articles/how-to-customise-your-customer-portal-theme) (https://kb.pixalink.io/articles/how-to-customise-your-customer-portal-theme)
- [Getting Started with Pixalink — Your First 10 Minutes](https://kb.pixalink.io/articles/getting-started-with-pixalink-your-first-10-minutes) (https://kb.pixalink.io/articles/getting-started-with-pixalink-your-first-10-minutes)