

Set Up Welcome Messages and Vouchers for New Customers

What Is This?

A warm welcome turns a first visit into a lasting relationship. Pixalink can greet every new customer for you with a friendly message and a free voucher, sent the moment they sign up. You set it once and it runs on its own.

Set Up Welcome Messages and Vouchers for New Customers

Pixalink Customer Loyalty Program Software



Watch on

One caveat the video leaves out: "skipped on purpose" is only true for the **customer-list import** (CRM → Customers → Import). A **transactions, redemptions, or iVend** import creates any phone number it has not seen before and *can* still send the welcome. Read "Why Imported Customers Do Not Get the Welcome" below before you upload those files.

Real-Life Example

Farah runs Petal & Stem, a florist in Subang. She wants every new sign-up to feel special, so she sets up a welcome voucher for a free posy and a short WhatsApp hello. She tests it with her own number, and the voucher arrives in seconds. Later she imports her list of 400 regulars and waits for the vouchers to go out. Nothing happens. She worries it is broken. It is not. Imported customers are left out on purpose, and Farah gives them a treat a different way instead.

How to Set It Up

1. Go to **Loyalty Program** → **Rewards** and open the reward you want to give new customers.

 Dashboard

Loyalty Program

 Record Points

 Point History

 Rewards

 Customer Portal Design

 News Feeds

 Referral Configurations

 Tier Configurations

 Feedbacks

Reservation

 Calendars

 Reservations

CRM

 Broadcast Batches

 Campaigns

 Customers

 Scan & Share

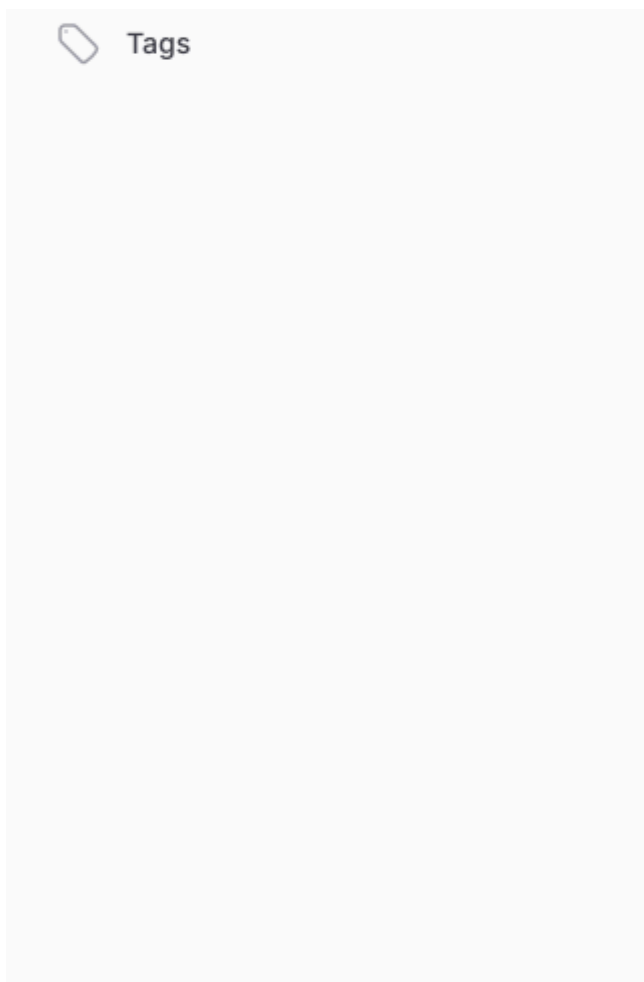
General

 Spaces

Settings

 Users

 Configurations



2. Open the **Automations** tab and turn on **Auto-assign to New Customers**. Set the **Quantity** and a **Delay Duration**, and pick **Immediately** for an instant welcome.

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Dashboard

Loyalty Program

- Record Points
- Point History
- Rewards**
- Customer Portal Design
- News Feeds
- Referral Configurations
- Tier Configurations
- Feedbacks

Reservation

- Calendars
- Reservations

CRM

- Broadcast Batches
- Campaigns
- Customers
- Scan & Share

General

- Spaces

Settings

- Users

Rewards > Free Coffee > Edit

Edit Free Coffee

View Delete

Reward Details Settings **Automations** Notifications Misc

New Customer

Auto-assign to New Customers ☐ **Quantity**

Delay Duration

Delay before automatically assigning the reward to new customers

Birthday

Auto-assign to Birthday Customers ☒ **Quantity**

By Default, the reward will given the next day after registration if this month is customer's birthday month.
Enable on-the-day option to give the reward on the day of registration.

Birthday Reward Assignment Time*

Set the specific time the reward is assigned to the customer's account on their birthday. Choosing a time to ensure the customer receives their rewards and notification at a convenient hour.

Advanced

Auto-assign on the day of registration ☐

3. Open the **Notifications** tab, pick **WhatsApp** or **Email**, and turn on the customer notification so they hear about their voucher.

Notification Settings

Configure WhatsApp notifications of this reward.

Notification Channels

☐ Email

☐ WhatsApp

Select which channels to use for reward notifications. Email is free for all organisations.

Notifications for Customers

New Reward Notification
Notify your customers when they receive this reward.

Expiring Reward Notification
Notify your customers when this reward of theirs is expiring soon.

Expired Reward Notification
Notify your customers when this reward of theirs was expired.

Reward Used Notification
Notify your customers when this reward of theirs has been used.

Notifications for Vendor

Reward Claimed Notification
Notify yourself when your customers claim this reward.

Save changes Cancel

Customer Rewards Reward Vouchers

4. Add a welcome message. Go to **CRM → Campaigns**, choose **Create Templated Campaign**, and pick **New Customer**. Write your greeting and pick the channel.

Campaigns > Create Templated Campaign

Create Templated Campaign

Campaign type

☒ New Customer
Welcome and say hi to new customer !

☐ Birthday
Congratulate customer on their birthday and give them a special offer !

☐ Big Spender
Reward your customer who has spent a lot in your shop.

☐ Shop Anniversary
Let your customer know that your shop is celebrating anniversary!

☐ Membership Day
Send monthly promotional messages on a specific day with discount offers!

☐ Win Back Lost Customer
Re-engage with customer who has not visited your shop for a long time.

☐ Custom Anniversary
Reach out to customers on their special anniversary dates!

Broadcast channel*

SMS x Email x WhatsApp x

SMS / WhatsApp will applies additional charges

Email

Subject*

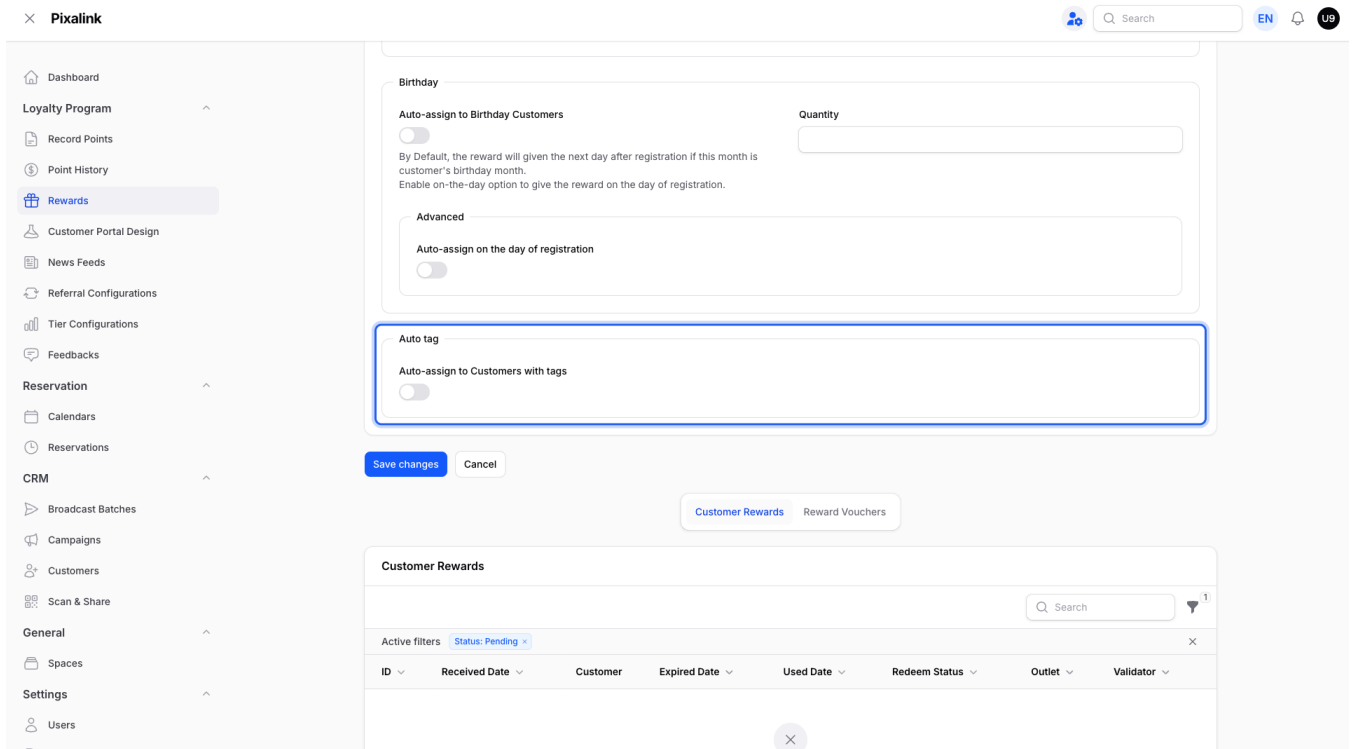
From*

Select an option

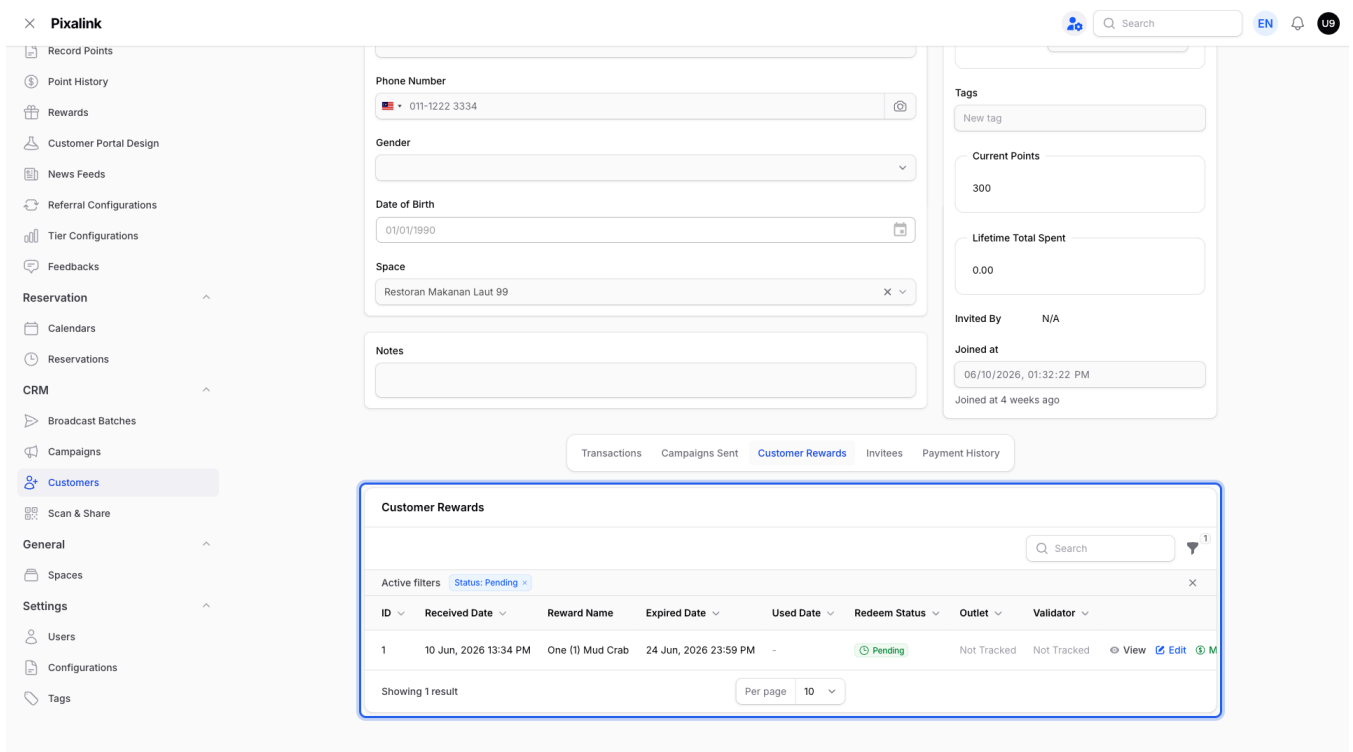
Preview

JL99

5. Reward the people you have already imported. Open a reward, turn on **Auto-assign to Customers with tags**, and pick a tag such as "imported-regulars".



6. Check who got what. Go to **CRM → Customers**, open a customer, and look at the **Customer Rewards** and **Campaigns Sent** tabs.



Why Imported Customers Do Not Get the Welcome

This is on purpose, not a fault. The welcome fires once, at the moment a customer signs up. An import adds many people at once, often your whole history. If the welcome ran for every one of them, hundreds of people would suddenly get a voucher and a message meant for brand-new customers. That would waste vouchers, confuse your regulars, and burn through your message credits.

So Pixalink holds the welcome back for the **customer list import** — the spreadsheet of customers you upload under **CRM → Customers → Import**. People who sign up on their own from now on get the

welcome; people you bring in through that customer-list upload do not.

Important — other kinds of import can still send the welcome. The skip rule covers the customer-list upload only. Some other actions create a brand-new customer record and *will* greet them: importing a **transactions** file, importing a **redemptions** file, and an iVend POS customer CSV. Each of these creates any phone number it has not seen before, and a freshly created customer triggers the welcome reward (and its WhatsApp or email notification) just like a real sign-up. There is no rate limit on those messages.

The right way to treat your imported base:

- Add a tag to them during the import, using a **Tags** column in your file. You can also select them later and use **Add Tags**.
- Set a reward to **Auto-assign to Customers with tags** for that tag. Everyone with the tag who does not already hold the voucher gets one.
- Send a message with a campaign aimed at that same tag.

This way you choose exactly who gets the treat, and no one gets it twice.

What Your Customers Will See

A new customer gets your WhatsApp hello and a voucher they can open in their portal. If you set a delay, both arrive a little later instead of straight away.

Good to Know

- **Timing:** by default the welcome goes out right away. A **Delay Duration** can hold it back from one minute up to one week.
- **Test with your own number the safe way:** sign up as a brand-new customer using a number that is **not** already in your customer list. The welcome only fires for a first-time sign-up.
- **Do not delete a customer to force a welcome.** Deleting a customer erases their points, credits, vouchers, and history for good.
- **Do not import the same list twice.** A repeat import can create duplicate records or overwrite details you have edited. To treat people you already have, use tags instead.
- **Import your customers fully before you import transactions.** If you follow the historical-points guide (import customers, then import their past transactions), finish the customer import first and check it. Any phone number in the transactions file that is not already a customer will be created on the spot, and that new customer can receive the welcome reward and a WhatsApp greeting from your number. When you upload the transactions file you can also tick **Skip unregistered customers** so unmatched rows are skipped instead of creating new customers.

If Nothing Arrives

- Check your **WhatsApp Number** is connected and shows as working.

- Check the reward is active and **Auto-assign to New Customers** is on.
- Check the reward's customer notification is on, or your **New Customer** campaign is active.
- Wait a moment if you set a **Delay Duration**.
- Remember the customer-list import is meant to skip the welcome. Use the tag method for those people. (A transactions or redemptions import is different — it can create and greet brand-new customers.)
- Test with a fresh number, not one already saved. If it still does not arrive, contact support.

Need Help?

Our support team is happy to help you set up your welcome and check that it is sending.

What's Next?

- [New Customer Reward — Automatically Welcome New Members with a Reward](#)
- [How to Create a New Customer Campaign](#)
- [How to Send a Welcome Back Voucher to Imported Regulars](#)

► **Video transcript: Set Up Welcome Messages and Vouchers for New Customers**