

Guests & Loyalty

Optional guest profiles, allergies, visits, unpaid, and loyalty rewards.

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Owners · managers · floor supervisors

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Overview

Guests are optional customer profiles for your venue: name, phone, allergies/tags, visit history, unpaid bills, and (if you turn it on) loyalty points.

Nothing on the floor is forced. Staff can still run name-only tabs exactly as before. Linking a guest is an extra step when you want to know the regular, flag allergies, or run rewards.

In admin: People → Guests — profiles, loyalty setup, PDF export of the guest list.

On the till: When setting the customer name, you can optionally link a phone / guest profile. Skip it and the tab works as usual.

Service flow at a glance

1. Owner/manager adds guests in **People → Guests** (or staff create one when linking on FOH).
2. Optional: turn on **Loyalty** and pick a Tavo preset (or your own numbers).
3. On the floor, open a tab → set customer name → optionally **link guest** by phone.
4. Close the bill as normal. If a guest was linked and loyalty is on, points earn automatically.
5. At payment, if the guest has enough points, staff may **redeem** once for a rand discount.
6. In Office, open the guest to see visits, unpaid balance, and points.

People → Guests (Office)

Profiles

Each guest has:

Field	Why it matters
Name	Shown on the till when linked
Phone	How FOH finds the guest — required to create a profile
Email	Optional contact
Allergies / dietary	Shown as insight on the tab when linked
Tags	Soft labels (Regular, Birthday, etc.)
Notes	Free text for the team
Points / visits / spend	Loyalty and history when used

Tip: Keep allergies accurate — floor staff see them when the guest is linked.

Visit history and unpaid

On the guest sheet you can see:

- **Recent visits** — closed orders that were linked to this guest (order #, date, payment, total). Tap to open that day in **Sales** → **Orders**.
- **Unpaid balance** — closed-as-unpaid amounts for linked orders only. Settle those bills from **Orders**, not from Guests.

Good practice: Link the guest *before* closing unpaid so the balance appears on their profile.

Export PDF

Use **Export PDF** on the Guests page for a printable list (name, phone, tags, allergies, points, visits, spend, notes). The export follows your current search filter.

Loyalty (when enabled)

Loyalty is **off** until an admin enables it under Guests → **Loyalty**.

Setup

1. People → Guests → **Loyalty**.
2. Enable loyalty for the venue.
3. Start from a Tavio preset, then fine-tune if needed:

Preset	Rough deal
Tavio recommended	About R500 spend → R50 off (1 pt per R1, 500 pts)
Light	About R1 000 spend → R50 off
Generous	About R400 spend → R50 off

You set:

- **Points per R1** spent
- **Points needed** to redeem one reward
- **Reward value (R)** — amount discount at pay

The sheet shows a plain-English summary (spend to unlock and % back). Soft warnings appear if your numbers sit outside Tavio's usual 5–12% guideline — you can still save.

In admin: Only admin / owner can change loyalty settings.

How earn works

- Guest must be **linked** on the order.
- When the bill **closes**, points are added: floor of (bill total × points per rand).
- Name-only tabs (no guest link) earn **nothing**.

How redeem works

1. Open payment on a linked tab.
2. If the guest has enough points, a **Redeem** button appears.
3. Staff taps it → a rand discount is applied (one reward).
4. When the bill closes, redeem points are deducted, then earn points are added on the final spend.

Redeem is optional. Staff are never forced into a loyalty flow.

On the till: If Redeem is missing, check loyalty is enabled, the guest is linked, and they have enough points.

Manual point adjustments

On the guest sheet, managers can add or remove points (+10 / +50 / –10) for house corrections (make-good, birthday gift, etc.). Keep a short house rule for when that is allowed.

Linking a guest on FOH

1. Open or edit the **customer name** on the order.
2. Optionally open **link guest** and enter a phone.
3. If a profile exists, Tavio matches it; if not, you can create one.
4. Save. The tab may show a short insight line (allergies, tags, points).

Warning: Do not invent phones. Wrong phone = wrong profile, allergies, and points.

Leaving phone blank keeps classic **name-only** behaviour.

Common questions

Must every table have a guest profile? No. Optional only.

Do points work without loyalty enabled? No. Profiles and unpaid/visits still work; points stay at zero until you enable loyalty.

Can I settle unpaid from Guests? No. Open the order from the guest sheet (or Sales → Orders) and settle there.

What if two phones for one person? Create one clean profile and use that phone on FOH. There is no merge tool yet — avoid duplicates.

Does draft New Order earn points? Earn runs when a linked order is **closed** from All Orders payment. Link the guest on the tab you close.

Tips

Good practice: Turn loyalty on only after staff know how to link a phone in under 10 seconds.

Good practice: Brief the floor: redeem is optional; allergies on the insight line matter more than points.

Good practice: Chase unpaid from Orders each morning; use Guests to see *who* still owes.

Troubleshooting

If this happens	Check this
No points after close	Loyalty enabled? Guest linked on that order?
Cannot redeem	Enough points? Already redeemed on this bill? Loyalty on?
Guest not found by phone	Formatting; profile phone; create profile in Guests
Unpaid missing on guest	Order closed as unpaid with guest linked
Visit list empty	Only closed linked orders appear
Loyalty settings won't save	Admin/owner role; try again online
PDF empty	No guests (or search filter hid everyone)

Glossary

Term	Meaning
Guest	Customer profile (phone-keyed) for your venue
Link	Attach a guest profile to an open tab on FOH
Insight	Short allergy/tag/points line on the tab
Loyalty	Optional points earn/redeem program
Redeem	Spend points for a rand discount at payment
Unpaid (guest)	Closed unpaid bills linked to that profile
Visit	A closed order that was linked to the guest

