



Card Program Setup

Loyalty & Additional Card Functionality

RESELLER INFO

CUSTOMER INFORMATION

Merchant Company Name _____

Contact Name _____

(_____)

Phone # _____

Email Address _____

Reseller Company Name _____

ID _____

Sales Rep Name _____

ID _____

(_____)

Sales Rep Phone _____

Ext _____

Sales Rep Email Address _____

CARD PROGRAM SETUP INFORMATION

Loyalty Programs

Auto Rewards:

Reward value is automatically added to the card when a customer's point balance reaches the level specified by merchant. \$1 = 1 point.

Choose award level (# of points customer must earn to receive dollar award): _____ points **Example:** 50 points = \$5 of value added to card.

Choose award amount: \$ _____ **Hint:** \$5 for 50 points is equivalent to a 10% discount for your repeat customers.

Add-Value function: ___enabled ___disabled (Default setting is disabled. This prevents clerks from inadvertently adding value to a card instead of points).

Open Rewards:

No reward levels or reward amounts are set up in the system. Points may be added and redeemed in any amount.

Choose dollars-to-points conversion ratio: \$1 = 1 point (recommended) \$1 = _____ points 1 purchase = _____ points

Multiple-Award Levels:

Establish up to 6 reward levels. System will indicate on terminal receipt when a reward level has been reached. Customer may redeem a reward level or continue accumulating points towards the next level for a greater reward. Only entire reward levels may be redeemed.

Choose dollars-to-points conversion ratio: \$1 = 1 point (recommended) \$1 = 10 points \$1 = _____ points 1 purchase = _____ points

Choose award levels: LEVEL 1 = _____ pts 2 = _____ pts 3 = _____ pts 4 = _____ pts 5 = _____ pts 6 = _____ pts

Additional Card Functions - Available for Gift and/or Loyalty Cards as indicated

Merchant is responsible for knowing and complying with state and federal laws governing features such as expiration dates and service fees on unused balances.

Ship cards already active with value or points (gift or loyalty): indicate VALUE \$ _____ or, POINTS _____

Card # Range _____ to _____

Minimum/Maximum card value (gift only): Minimum activation/add-value amount \$ _____ Maximum card value allowed \$ _____

Card # Range _____ to _____

Card Expiration (gift or loyalty): Expiration of cards may be set to key off of a specific transaction, group of transactions or a date.

1. Set cards to expire _____ days after activation last transaction, or any of the following checked transactions: activation add value

2. Set cards to expire on the following date ____/____/____ sale balance inquiry add points redemption

Card # Range _____ to _____

Service Fee (gift only): monthly service fee amount \$ _____ Set service fee to begin _____ days after last transaction

Card # Range _____ to _____

Misc. Instructions
