Preferred
Loyalty Solutions

HYPERCOM
TERMINAL TRAINING

Processing Transactions on the Hypercom T4205 Dial, T4210 Dial and T4220 Dual Com

terminal training

March 2014 v110+

Basic Setup Instructions

If using a certified Hypercom **T4220 Dual Com** terminal to process transactions over the Internet, follow the instructions below if your site uses a **DHCP** Internet connection ("plug and play"). If your location uses a **Static IP** connection, please contact your ISP or network administrator to collect values for: IP Address, Subnet Mask, Gateway IP Address, and DNS IP Address. Once you have collected these values, contact your loyalty vendor for further instructions.

1. If using a **T4220 Dual Com** model, before powering on the terminal, plug a Cat-5 Ethernet cable from an available port on your router into the **NET** port underneath the device. We also recommend plugging a telephone line into the **LINE** port underneath the device for dial backup (recommended).

2. For **T4220 Dual Com** users, your terminal should by default, be ready to process over the Internet with an auto dial backup if an internet connection cannot be found. Please refer to Exhibits A and B in the back of this slideshow for instructions on switching between internet and dialup and enabling or disabling the auto dial backup feature.

3. If using a **T4205** or **T4210** Dial Only model Hypercom terminal, just plug a telephone line into the **LINE** port underneath the machine.

4. Power on the terminal connecting the power cord to an electric outlet. After boot up wait for the screen to stop moving and select the function key next to the **Loyal Patron** logo.

Root Menu Screen

Once the terminal has been powered on and properly downloaded with software, the root menu will display all applications that have been loaded on your terminal.

Your gift and loyalty program and credit card application (if installed) are completely separate applications running on different processing networks.

Press the function key next to **LOYAL PATRON** on the root menu screen in order to access your gift and loyalty program. The function key could be situated on the left or the right depending on your configuration.

Press the **HOME** key on the terminal to toggle between your credit card application and your loyalty program (if running both concurrently).

Main Menu Screen

The gift and loyalty program main menu features the three main terminal functions: Record Sale, Balance Inquiry and Load Value.

Record Sale is the most commonly used function to enter the sale amount of customer transactions and process redemptions (if applicable), which drives the calculation of earned rewards. Clerks can swipe cards at the main menu screen to initiate a Record Sale transaction by default.

Balance Inquiry enables users to check the activation status and available balances on a customer's account in addition to printing a history of recently processed transactions.

The **Load Value** function is used to manually add value to patron accounts such as selling gift or prepaid card packages.

Press the **Report Menu** to access reports of recently processed transactions. Press the **MORE** purple key to access the **Setup Menu** for configuration options. Press the **Red** Cancel button to return to the main menu or the star key to return to the root menu.

Swipe Card Screen

Go ahead and swipe a card at the main menu to initiate a Record Sale transaction. If hand-keying the ID off the back of a card, you do NOT need to enter the first 4 zeroes.

If a registered customer does not have a card available, you can enter their mobile number in this screen in lieu of card ID#.

The mobile number in lieu of card ID transaction will only process if the customer has registered with their Mobile Phone #. Otherwise, the system will return Invalid Card ID error. An error message will also return if the user registered more than one (1) card with the same mobile number since the system cannot detect which card the customer intended to use. We recommend keeping the **Max Accounts Per Person** value set to **1** in **Registration Settings** to prevent customers from registering more than one (1) loyalty account.

Record Sale Amount Screen

On this screen the clerk simply enters the sales ticket amount for the current transaction. Always enter the FULL amount of the sales ticket in this screen. Do NOT discount or adjust the sales amount for a redemption (that screen comes later). This value should match the POS system ticket so if a ticket rings up to $12.54 in the POS system, enter $12.54 on this screen.

It’s up to management whether or not to include tax but worse case with inputting tax is the customer receives a few extra in rewards that trigger more spending. We recommend entering the post-tax amount for this reason plus you will avoid unpleasant confrontations with customers when inputting the post-tax amount as opposed to the pre-tax subtotal.

For most configurations, the Sale Amount value must be greater than $0.00 or an error message will return with one exception. The Sale Amount screen can only be left at $0.00 when performing a Widget redemption transaction (if enabled).

Redemption Type Screen

Your gift and loyalty program enables clerks to record the sale transaction AND process a redemption (removing value from the patron's account) in ONE (1) consolidated transaction. Select **GIFT/RWDS** to perform a redemption for withdrawing funds from the Gift or Rewards balance.

The system automatically withdraws funds from the Gift Balance first (if available) followed by the Rewards Balance next by default.

If widgets are enabled on your terminal, select the function key to perform a redemption of widgets (e.g., "Games", "Kids Meals", "Draft Beers", "Car Washes" etc.) that was customized for your business as a separate currency in single integer format as opposed to currency format. The Widget currency is optional and enabled only at client request.

Selecting **NO REDEMPTION** assumes the patron's sale only will be recorded for the purposes of issuing rewards back to the customer. Clerks will select this option unless the consumer requests to redeem value off his or her account.

Gift Rewards Redemption Process

After selecting **Gift / Rewards** at the Redemption Type screen, the clerk will be prompted whether to Redeem All (Yes or No).

The **Redeem All** function overrides common Insufficient Funds errors to force through any rewards redemptions as long as the account is activated by cashing out any available balances on the patron's account to apply toward the sales ticket.

When selecting **Yes** to Redeem All, clerks are required to collect the balance owed **(Remitted Amount)** from customers if the patron's combined gift and reward balance cannot cover the total amount of the sale. Select **No** at the Redeem All screen prompt to enter a specific value to be redeemed by the customer.

The Redeem All feature provides convenience and fast processing since neither the customer nor the clerk has to know the patron's available balances in order to finalize a transaction. Just make darn sure your clerks collect the difference between the sale and redemption (Remitted Amount).

Widget Redemption Amount Screen (if enabled)

Merchants can enable an optional 3rd balance called the Widget Balance to track loads and redemptions of specific items in single integer format (1. 2. 3, etc.) as opposed to currency ($X.XX) format. This extra currency balance can be named anything you like such as: “Entrees”, “Lunches”, “Games”, or “Kids Meals” that displays on the printed receipt.

If Widgets are enabled in your account you will see the option to select the widget at the Redemption Type screen in addition to Gift/Rwds. After pressing the widget, the clerk will be prompted to enter a specific number of widgets to be redeemed by the customer, e.g., 1 or 2 games of bowling, 1 car wash, 3 kids meals etc.

Widget redemption limits can be set on specific card ranges or membership classes so one group of patrons may have a redemption limit of 1 or 2 per day while another group of patrons has no redemption limit to suit promotional strategies.

It is optional for clerks to enter a Sale Amount when performing a widget redemption. The sale amount screen can either be left at $0.00 or entered by the clerk. If a sales amount is entered by the clerk the patron will receive rewards based on this value.

Final Sales Confirmation Screen

The final confirmation screen provides clerks with the opportunity to check the accuracy of the transaction details before finalizing the transaction and printing a receipt.

If a gift/rewards redemption is requested by the patron the patron will earn rewards on the difference between the sale and the redemption (The Remitted Amount) which is explained in more detail on the following slides. Otherwise the patron will earn rewards on the sale amount entered by the clerk.

Clerks simply press **CONFIRM** to finalize the transaction and generate a receipt or press **CANCEL** to exit the transaction and return back to the main menu.

The merchant copy of the receipt automatically prints after a successful transaction. The clerk is prompted with the option to print a patron copy of the receipt or can cancel and return back to the main menu.

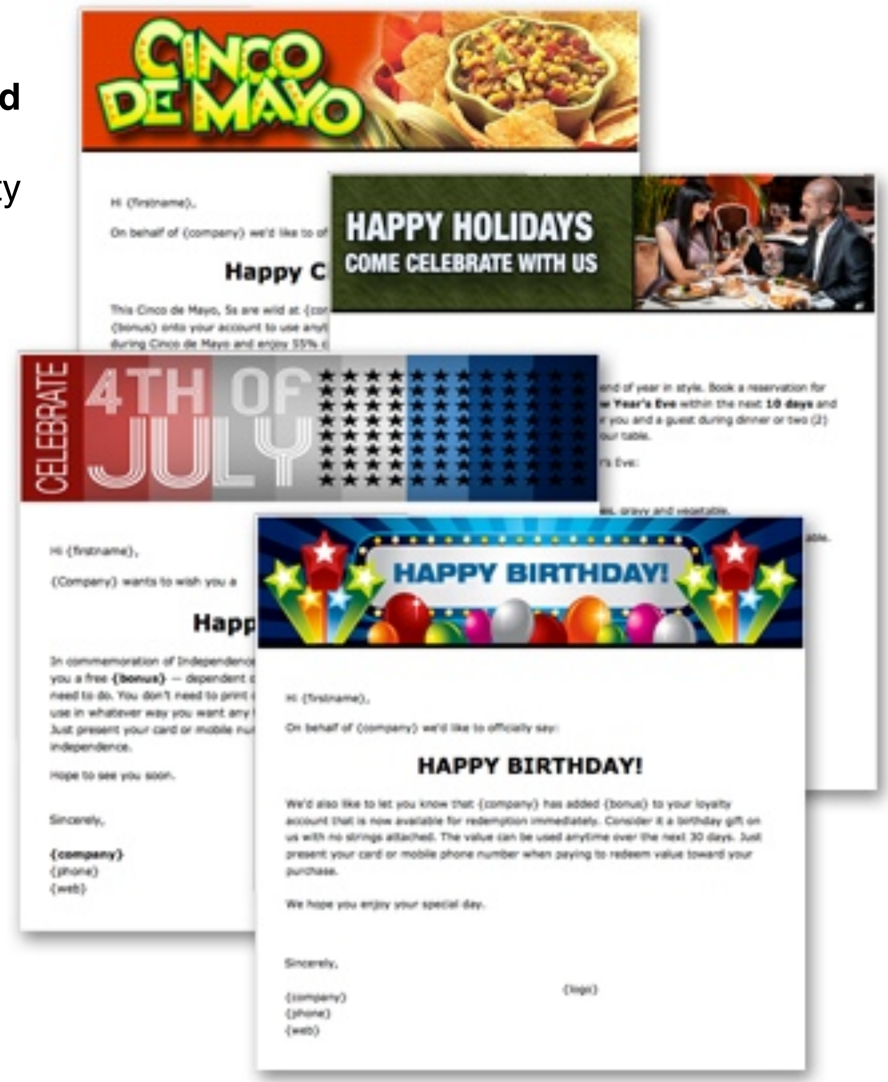
Assuming the patron activated their account, he or she will receive a thank you email the next morning reporting current balances if the **Thank You Note** is enabled in your **Automated Emails** module available from the back office.

Automated Email Marketing (Recommended)

Operators can create a variety of event bonuses and promotional templates by clicking **Event Triggers and Promotions** and **Automated Emails** when signed into the back office account with Administrator security clearance. Basic and Premium templates include:

- Thank You Note
- Happy Birthday
- Happy Anniversary
- Black Friday
- New Year's Day
- St. Patrick's Day
- Cinco de Mayo
- Mother's Day
- Father's Day
- Valentine's Day
- Independence Day
- And many more!

Once enabled, messages promoting special bonuses and promotions send out **<u>automatically</u>** to the proper patrons in your customer database. Just set it and forget it.



IMPORTANT
TRAINING REMINDER

Clerks do NOT need to perform any math in their heads to calculate rewards. The Load Rewards function on the terminal should NEVER be used to manually calculate rewards for customers (a common training mistake).

Please train your clerks to use the **Record Sale** function to record customer sales with or without redemptions and allow the system to automatically calculate rewards for your customers based on parameters configured in **Edit Rewards** page when logged into the back office.

The Load Value function can be secured so only managers can process load transactions (Recommended). See **Exhibit D** at the back for more information.

The Printed Receipt

The printed receipt summarizes all relevant transaction details including displaying the card activation status (Yes or No) along with current real-time balances available to redeem toward future purchases.

In the transaction illustrated on the right, the clerk recorded a **$23.00** sale with a **$10.00** gift redemption resulting in a remitted amount of **$13.00** [$23.00 Sale LESS $10.00 Gift Redemption = $13.00].

As described above, the **Remitted Amount** represents the amount of money clerks need to collect from customers in either cash or credit card.

Rewards are automatically calculated based on the Remitted Amount, which represents NEW money spent by customers. In the example to the right, a $1.30 reward was accrued by the patron based on a 10% reward ratio multiplied by the remitted amount [$13.00 x 10% = $1.30].

Footer messages can be customized by Administrators in the **Locations** tab of your online account.

SALE
Joe Smith
Sale Amount $23.00
Redeem $10.00 Gift
Remits $13.00
Earns $1.30 Reward

Joe's Crispy Chicken Shack
201 E. Main Street
Philadelphia, PA 19103

03/09/2012 1:18:02 PM

Card 10:	107000056
Trans. Num:	2012032565898
Activated:	Yes
Trans. Amt:	$23.00
Remitted:	$13.00
Gift Bal:	$0.00
Reward Bal:	$1.30

Thank you for visiting.
Come back soon.

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Fundraising Transaction Processing

There are two ways merchants can participate in a fundraising program. (1) Distribute a personalized fundraising card allocated to a specific non-profit organization that contains the merchant’s branding elements, OR (2) Accept a non-personalized fundraising coalition card distributed and marketed outside the merchant’s place of business.

Fundraising cardholders receive the **exact same** cash back rewards as any other card transaction. There is **no difference** in how cards are swiped by clerks or how rewards are generated between fundraising cards and other card types.

Fundraising cards, however, trigger a **donation accrual** back to a specific non-profit organization based on a % of sales agreed to by the merchant. This donation accrual is displayed on the printed receipt and recorded in the database for online reporting.

Merchants are responsible for funding non-profit organizations directly for their own **subscription** fundraisers using personalized cards. For **coalition** fundraising transactions, however, the program administrator performs all billing and donation disbursements on behalf of participating merchants.

SALE
Cardholder
Sale Amount $25.45
Earns $2.55 Reward

Salad Bowl
4065 Harvester
Burlington, ON L7L 5J1

02/29/2012 12:22:04 PM

Card 10:	302739572
Trans. Num:	20120229171925
Activated:	Yes
Trans. Amt:	$25.45
Gift Bal:	$10.00
Reward Bal:	$13.55
Games Bal:	10

$2.54 donated to
Colorado Youth Soccer

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Patron Online Activation Methods

The activation of a patron’s account is a critical step in your loyalty program because it represents the collection and authentication of customer data imported into your private marketing database.

Customers can activate their accounts online through EITHER our program website OR your business website if your webmaster implemented our private labeling instructions.

During online registration, your loyalty vendor runs all email addresses and mobile phone numbers through TowerData, a 3rd party database, to verify the validity of data supplied by patrons.

When patrons register by email or text, the system confirms the patron is the owner of the email address or mobile phone through a double opt in authentication process.

By default, rewards and widgets value (if enabled), whether earned through sales activity, or received as an activation or other promotional bonus, can only be redeemed by customers if their account has been activated. Gift value on the other hand, can be redeemed regardless of whether the account has been activated by the customer.

EMAIL DOUBLE OPT-IN

The standard activation method of clicking a link inside a welcome email to authenticate the patrons email and activate their account.

MOBILE TEXT OPT-IN

Upon completing registration, patrons are prompted to finalize the activation process by texting “ACT” to 55678 from their mobile phone.

FACEBOOK

Patrons simply click a button when signed into their Facebook account to “Allow” our system to pull data from their Facebook profile including name, email, birthday and location.

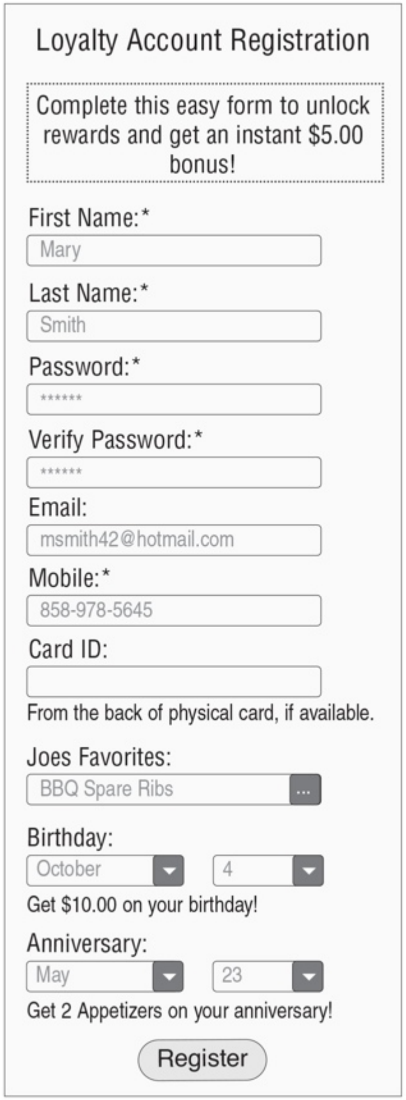
Text Keyword to Short Code Activation Method (Recommended)

The fastest and most efficient activation method is by keyword text to short code. This method works by advertising your unique keyword to customers with instructions to text “KEYWORD” to 55678 (USA) or 70734 (Canada) to register their loyalty account and unlock an activation bonus.

After patrons text your keyword to the short code, patrons tap a link from their phone to open the mobilized registration form and enter their name, email address, birthday and anniversary (optional). The fields displayed required or hidden can be customized in **Registration Settings** from the back office when signed in as an Administrator.

Patrons can enter a physical card ID during registration or leave card ID blank and create a card-less account. Upon registering, patrons will earn an activation bonus in the form of a fixed reward (i.e., $5 or $10) or a free widget such as an ‘Appetizer’, ‘Game’ or ‘Beverage’ as configured in the **Event Triggers and Promotions** page from the back office.

Contact Technical Support to request the activation of your unique keyword, if applicable. You can demo this registration method by texting **“CRISPY”** to **55678** from a USA based wireless carrier.


Loyalty Account Registration

Complete this easy form to unlock rewards and get an instant $5.00 bonus!

First Name:*
Mary
Last Name:*
Smith
Password:*
******
Verify Password:*
******
Email:
msmith42@hotmail.com
Mobile:*
858-978-5645
Card ID:

From the back of physical card, if available.
Joes Favorites:
BBQ Spare Ribs ...
Birthday:
October 4
Get $10.00 on your birthday!
Anniversary:
May 23
Get 2 Appetizers on your anniversary!
Register

Important Account Activation Rules

By default, patrons MUST activate their loyalty account in order to redeem **rewards** value or **widgets** value that was EITHER earned through sales activity OR triggered by bonuses configured in the **Event Triggers and Promotions** page of the back office.

This control is critical to help merchants build an accurate customer database since consumers have an incentive to activate in order to redeem balances on their account. Gift value, however, can be redeemed by clerks regardless of whether or not the patron's account is activated.

Clerks can still process sales and gift redemption transactions even if a patron's account is not activated. Patrons will not lose their rewards. The rewards will be unlocked and available for redemption at the point of activation.

Clerks can easily check the activation status of a patron's account by running a balance inquiry or by inspecting the Activated field on the printed receipt.

SALE
Joe Smith
Sale Amount $23.00
Remits $13.00
Redeem $10.00 Gift
Earns $1.30 Reward

Joe's Crispy Chicken Shack
201 E. Main Street
Philadelphia, PA 19103

03/09/2012 1:18:02 PM

Card 10:	107000056
Trans. Num:	2012032565898
Activated:	Yes
Trans. Amt:	$23.00
Remitted:	$13.00
Gift Bal:	$0.00
Reward Bal:	$1.30

Thank you for visiting.
Come back soon.

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Help Activating Account Trouble Tickets

IIn some cases, patrons have trouble registering a new account OR register their account online but fail to follow the final activation step that certifies their mobile number or email address through double opt-in authentication.

Your loyalty vendor provides a **Help Registering** trouble ticket service available from the online activation form (either our website or your website if your webmaster implemented our private labeling instructions). This service assists patrons complete the registration and/or final activation step. These tickets are resolved by your loyalty vendor's Technical Support Department, usually within one business day.

Please direct your customers to the **Help Registering** link online when they have difficulty activating an account and let us resolve their issue.

Balance Inquiry Screen

The Balance Inquiry function allows clerks to check available patron balances, activation status and recent transaction history without actually processing a transaction.

Press the **DISPLAY** option to show the patron's currently available balances and activation status on screen only.

Press **PRINT** to generate a paper receipt (Balances Report) showing the patron's current balance, activation status and most recent transaction details.

More detailed transaction history and sorting options can be viewed on the **Patron Activity Report** available online from Patron Search and View in your back office account.

Load Value Function

There are up to three separate currencies (balances) that appear on the printed receipt: **Gift, Rewards,** and the optional **Widgets** balance. All currencies can be manually loaded to execute a variety of prepaid strategies to drive visitation and frequency.

Gift value is commonly loaded when customers buy gift cards or load their account with value in advance to take advantage of a prepaid promotions strategy.

The customizable Widgets balance (e.g., “Games”, “Appetizers”, “Beverages”) is commonly preloaded to drive frequency with redemption limits of 1 or 2 per day.

Rewards value is commonly loaded to assuage customers during a complaint or dispute situation and manually adjust rewards for patrons.

We can disable any of the above Load Value functions from appearing on the terminal or add a **Manager Password** so only authorized personnel who know the passcode can access the Load Value function. Refer to **Exhibit D** in the back of the slideshow for instructions on enabling the Manager Password.

Load Gift Value Screen

Let's now walk through a Load Gift transaction. The Load Widgets and Load Reward transactions follow the exact same process.

Enter the exact amount of value being purchased by the customer or manually loaded to run a prepaid marketing strategy. In this example, we are loading $20.00 to the Gift Balance side of the patron's account.

After successful processing, the transaction details appear immediately on your online Reconciliation Report in real-time denoted by the Load Gift transaction type.

Administrators can use the **Fraud Monitor Settings** utility available online to flag any Load Value transactions equal or exceeding a predetermined threshold. Flagged transactions appear on the Fraud Monitoring Report for management review.

Refer to **Exhibit D** in the back of this slideshow for instructions on adding a Manager Password over all Load Value functions.

Final Load Gift Confirmation Screen

The final confirmation screen provides clerks with the opportunity to check the accuracy of the transaction details before processing and printing a receipt.

Clerks can either select **CONFIRM** to finalize the transaction or press **CANCEL** to exit the transaction without processing and return back to the main menu.

The merchant copy of the receipt automatically prints after a successful transaction. The clerk is prompted with the option to print a patron copy of the receipt or can cancel and return back to the main menu.

Follow the same process noted above for **Load Reward** or **Load Widgets** transactions, as applicable.

Terminal Reports

Unlike credit card processing, there is no settlement or batching function available or necessary in the gift and loyalty program. All transaction activity and subsequent reporting occurs in real-time and is available on demand anytime by clicking **Reconciliation Report** from the back office.

Clerks can access the Reconciliation Report directly from the terminal by pressing the down arrow from the loyalty main menu and selecting Report Menu.

Select **Detail Report** to pull line item details of each transaction processed during a specific time period or select **Summary Report** to view summary totals across transaction types.

Report activity is available for the present day **(Today),** the previous day **(Yesterday)** or from two days ago **(Two Days Ago)**. Select appropriate time period to print out desired report. Remember, the terminal reports will always match the detail or summary areas of the Reconciliation Report available online for the specific time period.

The Reconciliation Report can be emailed to authorized managers each morning on a daily basis which summarizes all transactions activity from the previous day. Click the appropriate User profile in the back office account to enable this setting.

Voiding Transactions

Similar to voiding a credit card transaction, any gift or loyalty transaction can be voided as if it never happened.

Clerks or managers can void a previously processed transaction directly from the terminal by pressing the down arrow at the loyalty main menu screen and selecting **Void Transaction**.

Swipe or hand-key the card ID# or patron's mobile number associated with the void transaction. On the **Void How?** Screen, select either **VOID LAST** to void the most recently processed transaction OR select **BY TRN#** to void a specific transaction identified by its transaction number printed on the receipt.

If the printed receipt is not available, you can locate the transaction number from the **Reconciliation Report** available online. Click **Display Trans Number** in Display Options and enter the transaction number in the terminal screen or just process the void through the Internet Terminal.

All void transaction activity is automatically reported on the **Fraud Monitoring Report** for management review.

Exhibit A: Connectivity

Switching Terminal Connectivity from Dial-Up to Internet (or vice versa) on T4220 Dual Com

Launch the loyalty program by selecting LOYAL PATRON at the root menu screen to access the loyalty main menu where Record Sale, Balance Inquiry and Load Value functions are displayed. Press the down arrow and select **Setup Menu**.

Select **TERMINAL** and when prompted, enter default Manager Password of **92266831** and press Enter. If you already changed the default Manager password, then enter the new password value here instead of 92266831.

Select **NEXT** once to display **PRIMARY COMM LINK**. Click **EDIT** and observe value. The value should be set to **2** for Ethernet (IP) processing or **1** for dialup processing. Press the desired value on the keypad and select **ENTER** to save changes.

Exit back to loyalty main menu and re-run a test transaction to verify successful processing and receipt printing. If problems persist, check cabling, try rebooting terminal and/or router or call Technical Support for assistance.

Exhibit B: Dial Backup

Enabling or Disabling Dial Backup on T4220 Dual Com

If you intend to run a telephone line for auto dial-backup (recommended) or wish to disable the auto dial backup feature follow the procedures below to enable / disable the function.

1. From the loyalty program menu, press the down arrow and select the function **Setup Menu**.
2. Select **Modem** and when prompted, enter default Manager Password of **92266831** and press Enter. If you already changed the default Manager password, then enter the new password value here instead of 92266831.
3. Press the **NEXT** button until you see **DIAL BACKUP?.**
4. Select **EDIT**. A value of **0** means the terminal will NOT try to dial out to process a transaction if an Internet connection cannot be located. A value of **1** means the terminal will attempt to dial out through a telephone line if an Internet connection cannot be located. Set desired value of **0 (No Backup)** or **1 (Backup Enabled)** and press ENTER to save changes.

Exhibit C: Enabling Clerk IDs

Enabling Clerk IDs for Linking Employees to Specific Transactions

When Clerk IDs are enabled, clerks are prompted to enter a specific numeric code (Clerk ID) before finalizing a transaction on the terminal. This code or ID is then validated for accuracy against the database during processing. An error message is returned if the clerk ID is entered incorrectly.

Clerk IDs can be any character length of digits such as the employee's Server ID in the POS system or last 4 digits of their social security number.

When enabled, Clerk IDs are published on all relevant reports including the **Reconciliation Report** and applicable **Fraud Monitoring Reports** so management can link specific employees back to specific transactions at a glance.

Setting up Clerk IDs should be initiated from your online account. Login to your account online and then click **Terminal Only Clerks** in the **Users** area. Then click the **Help button** at the top for detailed instructions for enabling Clerk IDs.

Exhibit D: Enabling Manager Password

Enabling Manager Password on Load Value Transactions

You have two (2) options for setting manager passwords to lock down the Load Value function. Operators can elect one of the following options or enable both for ultimate security.

Option 1: Manager / Administrator ID Validation

This option validates the Clerk ID entered by the employee has either **Manager** or **Administrator** security clearance as setup in the Users area of the back office. If the employee has Clerk clearance the Load Value transaction will fail and return an error. Turn on this feature by first enabling Clerk IDs as described in Exhibit C.

Once Clerk IDs are enabled, log into your account online, click your **Locations** tab(s) and check the box for **Require Manager Password for Load Value**. Verify BOTH checkboxes are enabled as shown below.

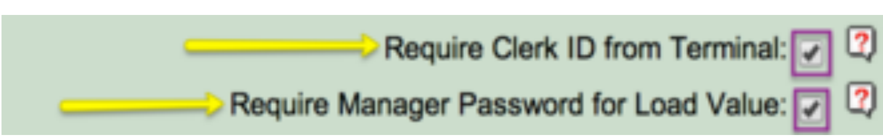

Exhibit D: Enabling Manager Password

Option 2: Set Hard Coded Terminal Password

This option adds a hard coded password prompt to the terminal itself so only users who input the correct password can even access the Load Value screens. Follow the instructions below:

1. From the loyalty program main menu, press the down arrow and select **Setup Menu**.

2. Select **TERMINAL** and when prompted, enter default Manager Password of **92266831** and press Enter. If you already changed the default Manager password, then enter the new password value here instead of 92266831.

3. Select **NEXT** until you see **ENABLE MANAGER PWD?** Click **EDIT** and observe value. The value should be set to **1** to enable the password over Load Value functions or set to **0** to disable it. Press the desired value on the keypad and select **ENTER** to save changes.

4. Select **NEXT** until you see **MANAGER PASSWORD**. Click Edit and observe value. Change the default password to any combination of digits you like that only authorized users will know. Press **ENTER** to save changes.

THANK YOU FOR YOUR ATTENTION

Preferred

Loyalty Solutions

www.PLSRewards.com

Need More Help? Contact Technical Support at 1-888-541-1138
Email: support@plsrewards.com