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SNAP Virtual Terminal

The SNAP Virtual Terminal is a web-based POS tool for issuing, redeeming and managing your gift and loyalty card program. Virtual Terminal can perform all of the functions of a standard terminal and more.

Tips for working with Virtual Terminal

- Virtual Terminal has been tested on Internet Explorer 8.x, Firefox 3.x and Safari 5.x – use of one of those browser platforms is recommended for optimal performance
- Use of the Virtual Terminal requires that your browser is set to accept cookies – check your browser’s ‘Help’ file for instructions on accepting cookies. You may also have to set your security software to accept cookies, again check the specific instructions for your software to set this feature
- The [Clear] button on the Log-in screen will reset the terminal – you will need to login using all 6 login fields after clicking the [Clear] button
- To print receipts you must have the pop-up blocker disabled – check your browser’s ‘Help’ for instructions on disabling the pop-up blocker for a single website
- The <Tab> and <Enter> keys can be used to navigate between the fields on each screen
- The <Spacebar> can be used to ‘click’ an on-screen control or radio button to activate it
- The ‘External Reference’ field found in most transactions may be used to record a transaction number from a POS or other payment system (Ex. Credit Card terminal) if desired. The field is limited to 12 alpha-numeric characters, no punctuation or spaces.
- The active (selected) field is always indicated by a yellow background color
- Required fields are marked on each screen in red
- Card numbers can be entered by swiping the card through a magnetic card reader, or typed in using the keyboard. Cards with barcodes can also be scanned using a standard barcode reader
- Using the calendar control - this control is available on several screens in the Virtual Terminal – indicated by a small icon to the right of the field

- Select the ‘Month’ or ‘Year’ by clicking on the appropriate drop list - next click the desired value from the list
- The [<] key will move the date back by 1 month, the [>] key will advance the date 1 month
- Select a specific date by clicking on it
Virtual Terminal Log-in

Initial Log-in Screen

Daily Log-in Screen

To Log-in to the SNAP Virtual Terminal

1. Open a browser window and navigate to https://vt.profitpointinc.com/sign-in - it might be a good idea to bookmark this URL for future reference
2. Enter your log-in credentials into each text box – the log-in information must be entered exactly as provided and it is case-sensitive. For example if your client ID is ‘BobSmith’ enter it exactly as shown
3. Click the [Sign-in] button to validate the credentials and open the terminal
4. After the initial login the Virtual Terminal site will only require the Employee and Employee Password for subsequent log-in – the other information is persisted in a permanent cookie stored in the browser history
5. The [Clear] button will reset the website and require the use of all 6 login fields to restart the terminal
Function Tabs

The Virtual Terminal breaks down the program types and functions into various sections under different tabs. To access a particular function or transaction type click on the corresponding tab.

- **Gift** – issue and redeem stored value cards
- **Reward** – issue and redeem loyalty points, enter demographic information
- **Promo** – used for tracking visit or purchase-based rewards
- **Report** – run reports on terminals, employees, and accounts
- **Advanced** – run multi-issuance transactions, change expiration dates, etc
- **Search** – locate a card number by searching on names, phone numbers, etc
Gift Tab
The Gift Tab is where the majority of transaction will be created when working in Virtual Terminal. The Issuance and Redemption of gift cards is the most common transaction type. The Inquiry transaction is another commonly used option – allowing you to easily check card balances. The Inquiry function is available in most of the other tabs in Virtual Terminal in addition to the Gift Tab.

Inquiry
You can run an inquiry transaction at any time to check on a card’s balance or status.

To run an Inquiry transaction
1. Enter the Account number
2. Click the Transaction drop list – select ‘Inquiry’ from the list of available transactions
3. Click [Go]
4. The site will now display the card balances and most recent transaction as shown below (at right on the terminal screen) –

You may print a copy of the report if required – click the [Print] button to print the report
Gift Issuance
The Gift Issuance transaction places a monetary value on an account and at the same time activates that account for future redemption. The value can be in any amount up to your program’s pre-set limits.

To issue a gift card
1. Enter the account number
2. Select the ‘Gift Issuance’ transaction type from the drop list
3. Enter the amount to be added to the card – do not use a dollar sign – enter amounts as 25.00
4. Enter a transaction reference in the ‘External Reference’ field if desired (See notes on pg 2)
5. If user demographics are enabled for your program you will see a link – Show\Hide User Info – on the screen. Click the link to display (or hide) the demographic data entry fields (see Pg 27 for information on demographics)
6. If your program uses any type of Promotions to issue points or value the ‘Promo Code’ and ‘Quantity’ fields will be displayed (as shown above) – enter any applicable codes for your program – if you need more than 2 codes click the [+] button to add extra fields
7. Click the [Go] button to finalize the transaction – the terminal will display a receipt on the right side of the screen (as shown) – click the blue [Print] button to create a hard copy receipt for the customer
Gift Redemption
A gift redemption transaction is used when a customer is purchasing goods or services at your location. The gift redemption can use all, or only some, of the value on the card depending on the amount of the purchase.

To redeem a gift card
1. Enter the account number
2. Select the ‘Gift Redemption’ transaction from the drop list
3. Enter the amount to be added to the card – do not use a dollar sign – enter amounts as 25.00
4. Enter a transaction reference in the ‘External Reference’ field if desired (See notes on pg 2)
5. If user demographics are enabled for your program you will see a link – Show\Hide User Info – on the screen. Click the link to display (or hide) the demographic data entry fields (see Pg 27 for information on demographics)
6. If your program uses any type of Promotions to issue points or value the ‘Promo Code’ and ‘Quantity’ fields will be displayed (as shown above) – enter any applicable codes for your program – if you need more than 2 codes click the [+] button to add extra fields
7. Click the [Go] button to finalize the transaction – the terminal will display a receipt on the right side of the screen (as shown) – click the blue [Print] button to create a hard copy receipt for the customer
**Tip**

This transaction can be used to add a tip for service after a bill is paid. It ties back to the original transaction and batch for bookkeeping reference.

To run a tip transaction

1. Enter the account number
2. Select ‘Tip’ from the Transaction drop list
3. Enter the amount of the tip
4. Enter a transaction reference in the ‘External Reference’ field if desired (See notes on pg 2)
5. To tie the Tip transaction back to the original purchase enter one or more of the following fields, note that this information is optional
   a. Transaction ID
   b. Batch ID
   c. Approval Code
   d. Batch Reference
6. Click [Go] to complete the transaction, you can print a receipt if desired by clicking the blue [Print] button
Transfer

The Transfer transaction allows you to move an existing balance between 2 cards. This is usually done if the original card is lost or stolen, but can also be used to split a card up into smaller denominations.

To transfer an account balance

1. Enter the original card number – if the card is not present the number can be typed in
2. Select the ‘Transfer’ transaction from the list
3. Enter the amount to be transferred – the total cannot exceed the original amount of the card
   a. NOTE – if closing an account do not enter the amount – the entire amount will be transferred automatically to the new card
4. Enter a transaction reference in the ‘External Reference’ field if desired (See notes on pg 2)
5. Enter the new card number – this card can be swiped, scanned, or typed as usual
6. Select the reason for the transfer by clicking one of the radio buttons –
   a. The ‘Lost’, ‘Stolen’, and ‘Replaced’ options will close the original card number and transfer the entire balance to the new card
   b. The ‘Not Closing’ option will not close the original card and should only be used when doing a partial transfer between cards
7. If you need to edit the user information click the ‘Show User Info’ link to display the demographic fields (refer to Pg 27 for more info)
8. Click [Go] to transfer the amounts between the cards and print a receipt if required
**Reward Tab**

The Reward Tab is used to enroll customers into your Loyalty program and issue/redeem Loyalty programs points.

**Inquiry**

You can run an inquiry transaction at any time to check on a card’s balance or status.

To run an Inquiry transaction

1. Enter the Account number
2. Click the Transaction drop list – select ‘Inquiry’ from the list of available transactions
3. Click [Go]
4. The site will now display the card balances as shown below (at right on the terminal screen) –

You have the option to print a copy of the report if that is required – click the [Print] button
Enrollment

This transaction is used to setup a new customer in your loyalty program. The system allows you to collect demographic information for future marketing and issue program points during the enrollment.

To enroll a customer into a loyalty program

1. Enter the Account number
2. Select the ‘Enrollment’ option from the drop list
3. Enter the initial point value for the card if desired
4. Enter a transaction reference in the ‘External Reference’ field if desired (See notes on pg 2)
5. Enter demographic data if required by your program (refer to Pg 27 for more info)
6. Click the [Go] button to save the information
Loyalty Issuance

Like the other issuance transaction types the Loyalty Issuance adds value to a customer’s account – this is usually reward points, depending on how your particular program is configured.

To issue points to a loyalty card

1. Enter the account number
2. Select ‘Loyalty Issuance’ from the drop list as
3. Enter the number of points to add to the account
4. Enter a transaction reference in the ‘External Reference’ field if desired (See notes on pg 2)
5. If your program has any applicable promotion codes enter them in the ‘Promo Code’ fields
6. To enter customer information click the Show User Info link – this will display the demographic data entry fields – enter the desired user information (refer to Pg 27 for more info)
7. Click the [Go] button to complete the transaction
**Loyalty Redemption**

This transaction is used when a customer is cashing in loyalty points for a reward in the program. The points are deducted from the card balance when the transaction is complete.

To redeem loyalty points

1. Enter the account number
2. Select the ‘Loyalty Redemption’ transaction type
3. Enter the number of points being redeemed in the ‘Amount’ field
4. Enter a transaction reference in the ‘External Reference’ field if desired (See notes on pg 2)
5. If your program has any applicable promotion codes enter them in the ‘Promo Code’ fields
6. To enter/edit customer information for this account click the **Show User Info** link – this will display the demographic data entry fields – enter the desired user information (refer to Pg 27 for more info)
7. Click [Go] to redeem the reward points
Loyalty Transfer
This transaction will move points or rewards to a new account number; it can be used to recover program points from a lost or stolen card. In some cases you may have a customer who wants to split points between 2 cards.

To transfer loyalty points\rewards
1. Enter the original card number – if the card is not present the number can be typed in
2. Select the ‘Transfer’ function from the drop list
3. Enter the amount to be transferred – the total cannot exceed the original value of the card
   a. NOTE – do not enter an amount if closing the original card, the entire amount will be transferred to the new card automatically
4. Enter a transaction reference in the ‘External Reference’ field if desired (See notes on pg 2)
5. Enter the new card number
6. Select the reason for the transfer by clicking one of the radio buttons –
   a. The ‘Lost’, ‘Stolen’, and ‘Replaced’ options will close the original card number and transfer the entire balance to the new card
   b. The ‘Not Closing’ option will not close the original card and should only be used when doing a partial transfer between cards
7. If you need to enter\edit user information click Show User Info link – this will display the demographic data entry fields – enter the desired user information (refer to Pg 27 for more info)
8. Click [Go] to transfer the point values and print a receipt
Promo Tab
The Promo tab is used for specialty rewards programs like frequency rewards or customized balance programs (for example get a free cup of coffee for every 10 purchased).

Inquiry
You can run an inquiry transaction at any time to check on a card’s balance or status.

To run an Inquiry transaction
1. Enter the Account number
2. Click the Transaction drop list – select ‘Inquiry’ from the list
3. Click [Go]
4. The site will now display the card balances as shown below (at right on the terminal screen) –

You also have the option to print a copy of the report if required.
Promotion Issuance
The Promotion Issuance transaction adds value to the selected account – this value can be visits, points, or other values based on the exact parameters of your program.

To add value (points) to a promotion card
1. Enter the card number
2. Select the ‘Promotion Issuance’ transaction type from the drop list
3. Enter the number of points, visits, or other value to be added to the card
4. Select the ‘Type’ of reward from the drop list that
5. If your program has any applicable promotion codes enter them in the ‘Promo Code’ fields
6. To enter/edit customer information for this account click the Show User Info link – this will display the demographic data entry fields – enter the desired user information (refer to Pg 27 for more info)
7. Click [Go] to issue the points to the account and print the receipt
Promotion Redemption
Promotion redemption will deduct points from a customer’s account when they cash in to collect their reward.

<table>
<thead>
<tr>
<th>Card Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Promotion Redemption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Promo Code 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Promo Code 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
</tr>
</tbody>
</table>

Show User Info

Clear  Go

To redeem reward points
1. Enter the card number
2. Select the ‘Gift Redemption’ transaction type
3. Enter the points amount to redeem – this can be any amount up to the total value of the card
4. Select the ‘Type’ of reward being redeemed from the drop list
5. If your program has any applicable promotion codes enter them in the ‘Promo Code’ fields
6. To enter/edit customer information for this account click the Show User Info link – this will display the demographic data entry fields – enter the desired user information (refer to Pg 27 for more info)
7. Click [Go] to redeem the points and print a receipt
**Promotion Transfer**
This transaction is used to transfer reward points and balances between 2 accounts. Used in the event of a lost or stolen card.

To transfer rewards or points
1. Enter the original card number – if the card is not present the number can be typed in
2. Select the ‘Transfer’ function from the drop list
3. Enter the amount to be transferred – the total cannot exceed the original value of the card
   a. NOTE – do not enter an amount if you are closing the original card, the entire amount will be automatically transferred to the new card
4. Enter the new account number – this card can be swiped or scanned as usual
5. Select the reason for the transfer by clicking one of the radio buttons –
   a. The ‘Lost’, ‘Stolen’, and ‘Replaced’ options will close the original card number and transfer the entire balance to the new card
   b. The ‘Not Closing’ option will not close the original card and should only be used when doing a partial transfer between cards
6. Click [Go] to execute the transaction and print a receipt
**Report Tab**

This tab provides basic reporting functions for transactions run through the Virtual Terminal. There are several options for report type, filtering, and printing of the reports. More detailed reporting tools can be found in the SNAP Admin toolset available at https://merchants.profitpointinc.com

- Account History – transaction history of a single account (gift\loyalty) number
- Employee History – transaction history of a selected employee
- Terminal Report – report of all transactions run in a single batch

To run a report
1. Enter the admin employee login credentials (Employee and Password) – required fields
2. Select the report type from the ‘Transaction’ drop list, there are 3 options available
   a. Account History – reports on all activity for a single account (card)
   b. Employee Report – displays all activity for the selected employee
   c. Terminal Report – reports on all transaction activity in the selected batch
3. The next field label will change according to report type
   a. Account – enter the card number
   b. Report on Employee – enter the employee number
   c. Report on Batch – enter the batch number
4. Select ‘Summary’ or ‘Detail’ by clicking the appropriate radio button
5. Set the Start and End Dates by clicking the Calendar icon to select the date
6. Set the ‘Offset’ – this is the number of transactions to skip in the report, older records are skipped and more recent records are displayed
7. Set the ‘Max Records’ value – this will limit the number of records returned by the report
8. By using the Offset and Max Records options you can control the number of records returned by the report – this can be useful if an account has a high number of transactions
Report Samples
This section of the document reviews samples of the available reports and explains some of the information presented.

Terminal Report
Terminal (batch) reports show all activity through a particular terminal and a selected batch number. The summary report shows a total of each transaction type run, while the detail report breaks down each transaction for specific information.

Terminal Report - Summary

<table>
<thead>
<tr>
<th>PROGRAM</th>
<th>DATE</th>
<th>TIME</th>
<th>TYPE</th>
<th>AMOUNT</th>
<th>CARD/ACCT</th>
</tr>
</thead>
<tbody>
<tr>
<td>011</td>
<td>0948A</td>
<td>GI</td>
<td>$1</td>
<td>999999991</td>
<td></td>
</tr>
<tr>
<td>011</td>
<td>0948A</td>
<td>GI</td>
<td>$1</td>
<td>999999991</td>
<td></td>
</tr>
<tr>
<td>011</td>
<td>0945A</td>
<td>GI</td>
<td>$1</td>
<td>999999991</td>
<td></td>
</tr>
<tr>
<td>011</td>
<td>0945A</td>
<td>GI</td>
<td>$1</td>
<td>999999991</td>
<td></td>
</tr>
<tr>
<td>011</td>
<td>0953A</td>
<td>GI</td>
<td>$1</td>
<td>999999991</td>
<td></td>
</tr>
<tr>
<td>011</td>
<td>0954A</td>
<td>V</td>
<td>6201</td>
<td>999999991</td>
<td></td>
</tr>
<tr>
<td>011</td>
<td>0985A</td>
<td>V</td>
<td>6394</td>
<td>999999991</td>
<td></td>
</tr>
<tr>
<td>011</td>
<td>3042A</td>
<td>GE</td>
<td>$1</td>
<td>999999991</td>
<td></td>
</tr>
<tr>
<td>011</td>
<td>3043A</td>
<td>GE</td>
<td>$1</td>
<td>999999991</td>
<td></td>
</tr>
<tr>
<td>011</td>
<td>3044A</td>
<td>GE</td>
<td>$1</td>
<td>999999991</td>
<td></td>
</tr>
<tr>
<td>011</td>
<td>3045A</td>
<td>GE</td>
<td>$1</td>
<td>999999991</td>
<td></td>
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<tr>
<td>011</td>
<td>3046A</td>
<td>AM</td>
<td>999999991</td>
<td></td>
<td></td>
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<tr>
<td>011</td>
<td>3047A</td>
<td>AM</td>
<td>999999991</td>
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<td></td>
</tr>
<tr>
<td>011</td>
<td>3111A</td>
<td>GE</td>
<td>$1</td>
<td>999999991</td>
<td></td>
</tr>
<tr>
<td>011</td>
<td>3112A</td>
<td>GE</td>
<td>$1</td>
<td>999999991</td>
<td></td>
</tr>
</tbody>
</table>

TOTALS

| A)acct (W)Jct: | 1 |
| G)frf (I)ss:   | 10 for 5.00 |
| V)jods:        | 3 |

Terminal Report - Detailed

Terminal reports display on screen and can also be printed.

Batch Close
The terminal report also provides an option to close out the selected batch.

To close the current batch

1. On the report screen (in the upper left corner) there is a prompt question ‘Would you like to close this batch?’
2. Click the [No] button to return to the ‘Advanced’ tab – the batch remains active
3. Click the ‘Yes’ button to close out the batch and return to the ‘Advanced’ tab
Account History Report

The account history report breaks down all transactions for the selected account number. These reports can run long if the account is very active – using date ranges, and the ‘Max Record’ option, can keep the report length manageable.
Advanced Tab

This tab contains several useful functions that are not normally part of the day-to-day operation of a gift and loyalty program. In many instances these functions are restricted to managers and supervisors as a security precaution.

Inquiry

You can run an inquiry transaction at any time to check on a card’s balance or status.

To run an Inquiry transaction

1. Enter the Account number
2. Click the Transaction drop list – select ‘Inquiry’ from the list
3. Click [Go]
4. The site will now display the card balances as shown below (at right on the terminal screen) –

You also have the option to print a copy of the report if required.
Renew
This transaction is used to extend the expiration date on a gift or other card that has expired. Because of the varying state and local laws regarding gift card expiration dates exercise caution when using this function.

To renew an expiration date –
1. Enter the card number
2. Select the ‘Renew’ transaction from the drop list
3. Set the new expiration date – click on the calendar icon and select the date
4. To enter/edit customer information for this account click the Show User Info link – this will display the demographic data entry fields – enter the desired user information (refer to Pg 27 for more info)
5. Click the [Go] button to save the new expiration date
Multiple Issuance

The Multi-issuance function is an easy way to issue more than one card in a single transaction. You can set values for a range of cards (sequential series) or up to 80 individual cards at a single time.

To run a multi-issuance transaction (Card Range)
1. Select the ‘Multiple Issuance’ transaction from the drop list
2. Select ‘Range’ by clicking the appropriate radio button
3. Enter the first and last card numbers in the range –
   a. Enter the first card number on the ‘Account 1’ line, enter the last card number on the ‘Account 2’ line
4. Enter the amount to be issued on the ‘Amount’ line – this amount will be issued to every card in the range
5. Click the [Go] button to activate the cards with the desired value

To run a multi-issuance transaction (Individual Cards)
1. Select the ‘Multiple Issuance’ transaction from the drop list
2. Select ‘Individually’ by clicking the appropriate radio button
3. To add more ‘Account #’ lines click the button – each click adds an additional account line (to a max of 80)
4. Enter the account numbers –
   a. Enter each card number on a separate line – use the <Tab> or <Enter> keys to move between lines.
5. Enter the amount to be issued on the ‘Amount’ line – this amount will be issued to every card.
   a. NOTE – you cannot issue mixed amounts – each card will be issued the value
6. Click the [Go] button to issue the cards and print a receipt
**Return**

A return transaction is used when a customer is returning merchandise paid for using a gift card. The value is returned to the card for future use.

To issue a return

1. Enter the account number in the ‘Card Number’ field
2. Select the ‘Return’ transaction from the drop list
3. Enter the amount to be returned to the card
4. Select the ‘Type’ from the drop list to select the currency type
5. Click the [Go] button to complete the transaction and print a receipt
**Void**

The Void transaction is used to cancel a transaction – this will re-set the card value to whatever it was prior to the transaction being voided. The

To void a transaction

1. Enter the card number
2. Select the ‘Void’ transaction from the drop list
3. Enter 1 or more values in the following fields from the original receipt
   a. Transaction ID
   b. Approval Code
   c. Batch ID
   d. Batch Reference
4. Click the [Go] button to void the transaction
Search

The Search function allows you to retrieve a card number by looking up user demographics, or you can use the card number to search for the owner’s demographic information. The search function uses a built-in wild card to return a range of data based on the criteria entered.

To run a search

1. Select the ‘Field’ type from the drop list
   - Selecting ‘Any’ will search all available fields to locate the information
   - First, Middle and Last name for searching by name
   - Phone – will search the phone number field
   - Email – searches the email field
2. Enter the search criteria in the text box – click [Go]
3. The search function uses a generic wildcard to return the widest possible result – for example if you search ‘Last Name’ with the value of ‘jon’ it will return ‘Jon, Jones, etc’
4. The search results box will persist if you navigate away from the search screen – it will only be replaced if you run a new transaction that generates a receipt
5. When the search result contains card/account numbers those numbers will be ‘hot’ – if you click on a row in the search box the account number will auto-populate the ‘Account’ number field on the current screen (you can identify the ‘hot’ lines by observing the mouse pointer – it will change to the hand shape when over a hot link)
Customer Demographics

Many of the various transactions provide the opportunity to capture customer demographic information. This data can be useful when planning marketing campaigns, or for sending rewards to your most loyal customers.

To capture demographic information

1. Select the type of customer by clicking one of the radio buttons
   a. Primary – the end user of the card, this can be the purchaser or recipient
   b. Secondary – usually a spouse or other family member of the primary
   c. Giver – the intended recipient, usually used in a gift card transaction
2. Enter the basic user information in the appropriate field – none of the data is required but it’s best to collect as much as possible for marketing needs
3. The following fields have certain restrictions –
   a. State – use the 2 digit state code (for US states and Canadian provinces)
   b. Country – use 3 character codes (USA, CDN, etc)
   c. Postal – enter a max of 6 characters (5 for US, 6 for Canada)
   d. Phone – use only numeric characters (ex. 555 555 1234)
4. Click the [Go] button to complete the enrollment or other transaction, this will save the customer data also