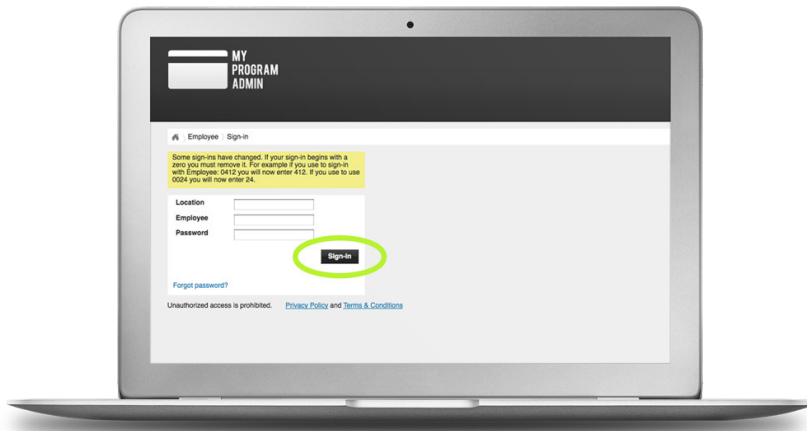
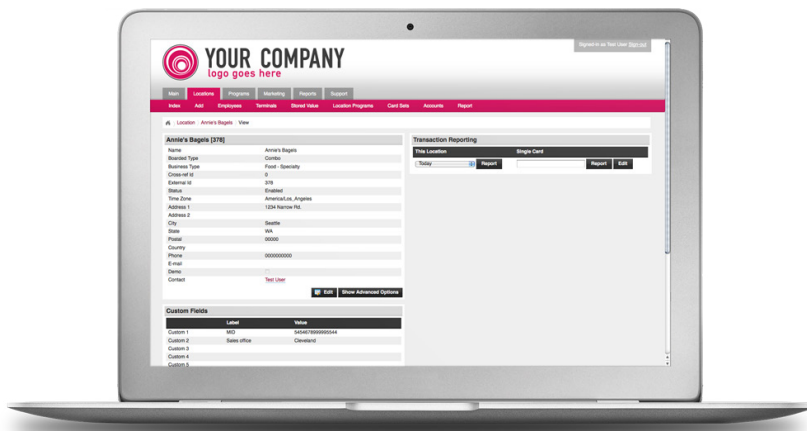


Merchant Training Manual



BASIC NAVIGATION

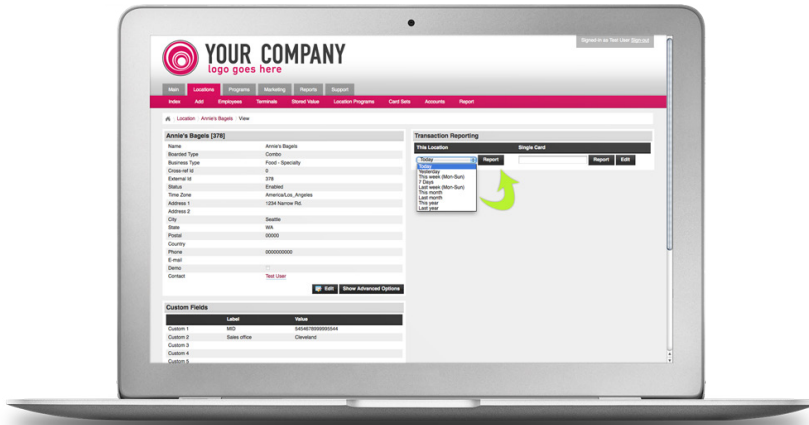
- Access your portal at:
<https://myprogramadmin.com>
- You will need your Location ID, Employee ID and Password. Your sales rep can provide you with this information.
- Please note that cookies must be enabled and the sign in credentials are case sensitive.
- Enter your Location ID, Employee ID, and Password.
- If the credentials you used to sign in to the old system began with zeros, you need to drop the zeros. For example, if your employee number is 0084, you will sign in with 84.
- Click "Sign In"



MAIN LOCATION PAGE

- Each of the main tabs at the top of the page has a set of sub tabs. This helps you to navigate the program and narrow down your desired activity.
- As you navigate through the program, a set of links develop under the sub tabs. These help you track forward and backward through the pages you have visited.
- Links are shown as text in colored font. If a name, number, or word is a color, clicking it will bring you to a new page or show you a report associated with it.

Merchant Training Manual



REPORTS

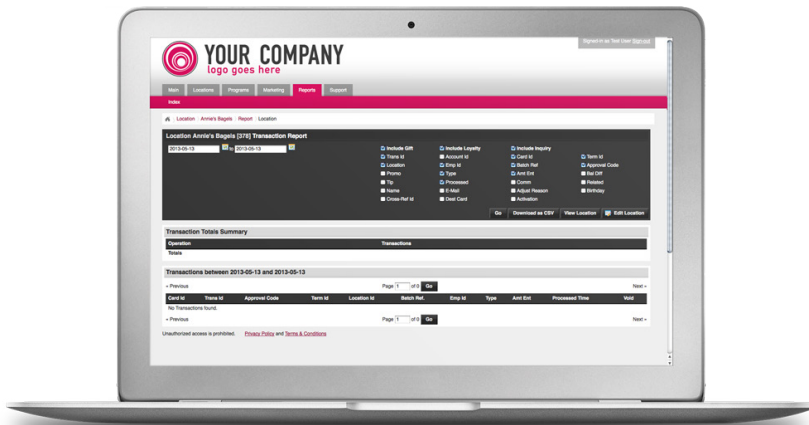
You can run reports for:

- Transactions (most often used)
- Data
- Liability
- Employees
- Terminals

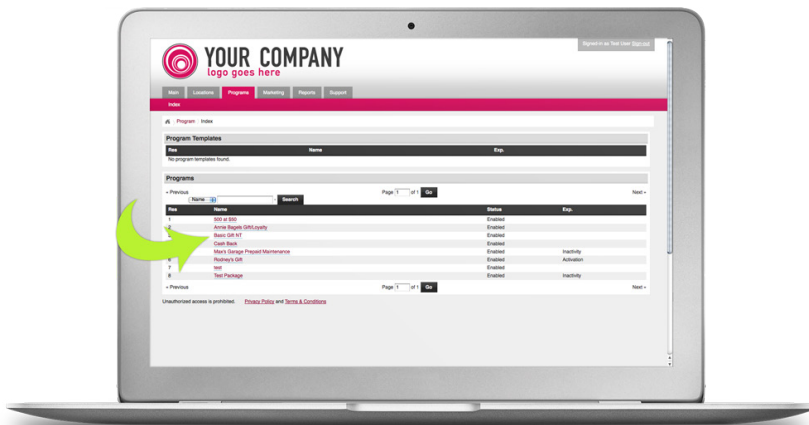
How to run a Transaction Report (multiple options):

1. Use the Quick Report option on your Location home page

- It is located on the right side of the screen, under the Transaction Reporting header.
- In the drop down menu choose the date or date range you want a report for.
- Click "Report"



After running the report you will notice a grey box that shows the date range you chose to report on, as well as several check boxes to the right. The check boxes control what information you view in your report. Each check box represents a column in the report. You can edit what information you view by checking and unchecking the appropriate boxes, then clicking "Go", this will regenerate the report.

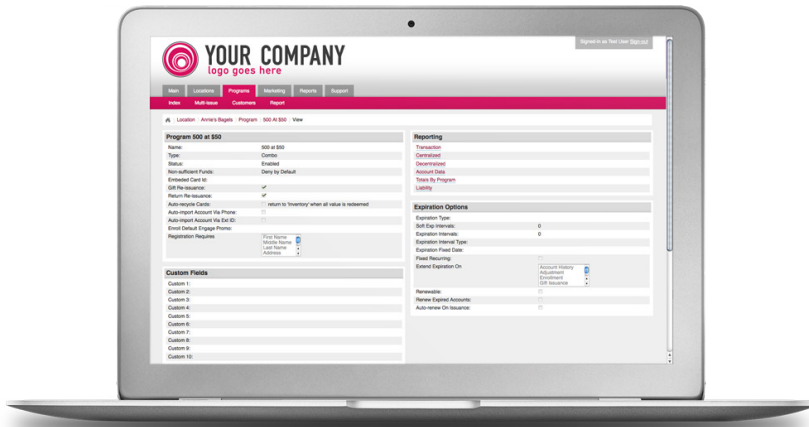


The Transaction Totals Summary gives you a snapshot of what types of transactions were run, how many of each, and the total values. In the report, if a transaction is highlighted pink it means that the transaction was voided.

2. Programs Tab

- You will see an index of the programs your location is currently a part of.
- To view the reports that are available for that program, click on the program name.

Merchant Training Manual



- There is a header labeled Reporting on the right side of the screen. Under this heading are several reporting options. Anything in colored font is a link, clicking on any report name here will take you to the report.

Below is a description of each report:

Transaction: Detailed of all transactions that were run in a given time period. This can be done for a specific program or for a location as a whole.

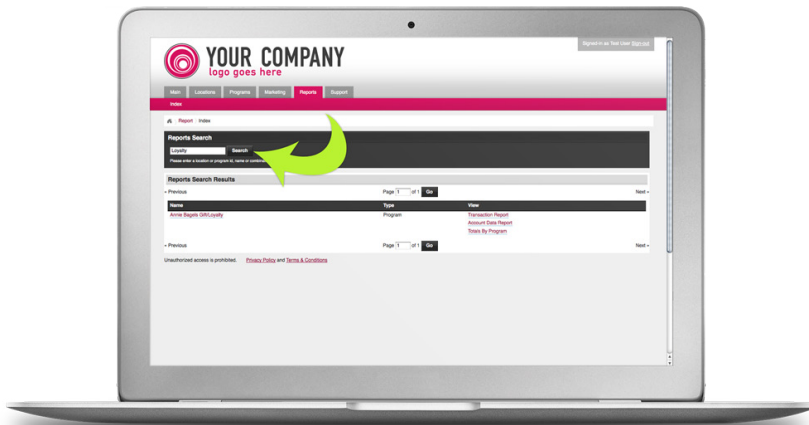
Centralized: This report is for merchants that have more than one location and have an accounting system that uses one main account that funds are deposited into and then dispersed from.

Decentralized: This report is for merchants with more than one location and have an accounting system in which the locations all pay each other rather than depositing into a main account.

Account Data: This report allows you to see the customer data that has been added to card numbers.

Totals by Program: Summary of the number and types of transactions run in each program.

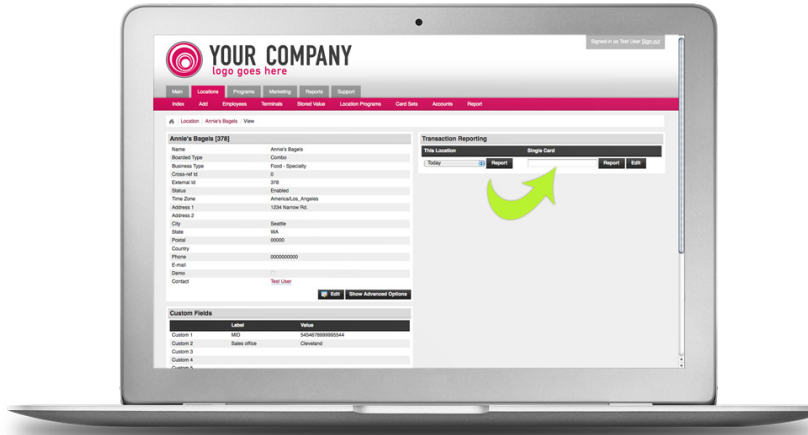
Liability: Card status summary, showing how many cards are active, expired and in inventory as well as the value totals on those cards.



3. Reports Tab

- This allows you to search for the report you are looking for.
- Type in the name of the program you want a report for and click Search.
- This will generate a list of the reports for that Program. You can then click on the Report name.

Merchant Training Manual



CARD EDIT

- On the Locations home page type in the card number you are looking for in the “Single Card” box.
- If you are simply looking for card information such as balance details and customer data already entered you can click “Report” which will bring you to the card summary page.

If you need to edit the card (add customer information, change a card status or change the balance) you will click “Edit”. You will notice several different headers on the Edit page.

- At the top left is the basic card information, including the card number, pin, and activation date.
- The right side of the screen shows the Balance information and the option to change the expiration date.

To edit the expiration date from Active to Expired:

- Enter in a date in the past in the expiration date box on the right, then click “Update Expiration”.
- This will automatically update the Status box on the left. Similarly, if you are changing the status from Expired to Activated, you can change the expiration date.
- Click Update Expiration and the status will be updated.

To change the balance of a card:

- Enter in the difference amount in the Difference box under the Balance header.
- Select the Type of value you are adding or subtracting and click Adjust.

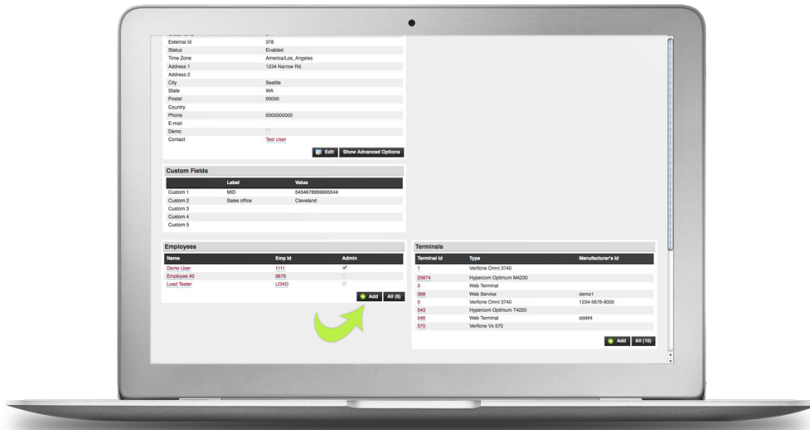
Scroll down to see the Custom Fields on the left and the customer information on the right.

Please Note
Status, expiration, and balance changes will produce a transaction.

Card 911441439301450 Edit		Balances	
Cross-ref ID:		Currency	22.48 USD
Pin	570791	Difference (+/-)	
Card Set	Java Joe 100 (4674)	Type	(None)
Initial Card Set	Java Joe 100 (4674)	Adjustment Reason	
Initial Set Sequence	9	Adjust	
Status	Activated	Expiration	
Activation:	2012-06-07 11:18:34 859-04	Expiration Date	
Demo	<input type="checkbox"/>	Adjustment Reason	To expire a card enter a date in the past
Adjustment Reason		Update Expiration	
Required when editing status and/or expiration			
Save Cancel	View Report		

Customer Custom Fields	Customer
Bagel <input type="text"/>	First Name <input type="text"/>
Drink <input type="text"/>	Middle Name <input type="text"/>
	Last Name <input type="text"/>
	Prefix <input type="text"/>
	Suffix <input type="text"/>
	Address 1 <input type="text"/>
	Address 2 <input type="text"/>
	City <input type="text"/>
	State <input type="text" value="None"/>
	Postal Code <input type="text"/>
	Country <input type="text" value="United States"/>
	Mail Opt In <input type="checkbox"/>
	Phone <input type="text"/>
	Mobile Phone <input type="text"/>
	Alt Phone <input type="text"/>
	Phone Opt In <input type="checkbox"/>
	E-mail <input type="text"/>
	Alt E-mail <input type="text"/>
	E-mail Opt In <input type="checkbox"/>
	Birthday <input type="text"/>
	Anniversary <input type="text"/>
	Gender <input type="text" value="N/A"/>
	User-name <input type="text"/>
	Password <input type="text"/>
	Save Customer Cancel
	Add

Merchant Training Manual



To edit this information you will need to fill in the appropriate fields, then click “Save Customer” at the bottom of the page.

If you are adding mobile numbers or email addresses for marketing purposes be sure to check the corresponding “Opt-In” box in order to ensure that the SMS and Email broadcasts are sent to the customer.

EMPLOYEE ADD AND EDIT

You will need to add the employees into your portal IF:

- You require an employee id and/or password at the terminal level
- You have additional employees that you should have access to the online portal

To do this, from your location home page:

- Scroll down to the Employee header
- Click Add
- This will bring you to the Employee Add page, which will allow you to add a new employee.

Below is a description of each field on this page:

Employee Id: This is your choice for how you want to identify your employees. Typically it is a numeric 1-4 digit number.

Password: This first password is for web administration access. If you are adding an employee that is going to be allowed access to the online portal, you must assign a web password. It must be at least 6 digits long. If the employee does not have access to the online portal you can leave this blank.

First/Middle/Last Names: This is the name of the employee you are adding.

Merchant Training Manual

E-mail: This is an optional field to store the email address of your employee.

Phone: Another optional field to store additional employee information.

Status: Any employee you add that will be running transactions or logging in to the portal needs to be at Enabled status. However, if you need to suspend their access at any time, you can change the status to Quit, Suspended, or Terminated. If an employee is set at any of those statuses they will not be allowed to log in or run transactions.

Password at POS: This is for any employee that will be entering a password into the terminal. It should be numeric only, typically 4 digits in length.

On the right side of the page is where you can set the privileges for each employee. Below are descriptions of each privilege.

Administrator: If this employee should have access to the online portal, this box must be checked. If it is not checked, they will not be allowed to sign in.

Account: Every card number has a corresponding account number, which contains customer, card, and balance information.

Card: If you want the employee to be able to view or edit card information (such as balances or expirations), check the appropriate boxes.

Customer: You can choose whether or not the employee can view or edit customer information such as name, phone number, and address.

Employee: This allows the employee to view and edit other employee information.

Location: This allows the employee to view and edit the merchant location information.

Broadcasts: You can allow your employees to send SMS and/or Email broadcasts.

Transaction: You can choose which transactions you want each employee to perform, in this case the employee can only do Gift Issuances and Redemptions, Loyalty Issuance and Redemption as well as Inquiries and Tips. However, the transaction would fail if the employee tried to void a transaction. Once you have finished choosing the employee privileges, click Save. A blue confirmation box will show up. This document covers the main functions of your online portal. Contact your gift card provider with any additional questions you may have.