



Version 1

Admin Area – Lost Cards

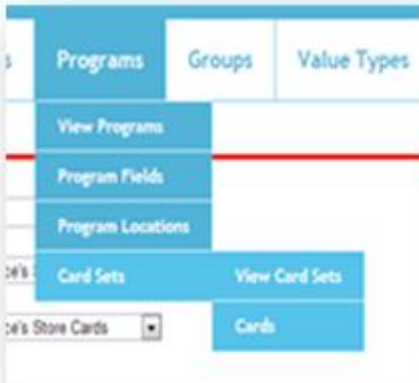
THE LOYALTY BOX is a combination of world-class technology, backed by a professional support team ensuring that your program is a success.

Table of Contents

Step One: Issue a New Card.....	3
Step Two: Transfer Points to the New Card.....	7
Step Three: Cancel the Old Card.....	9
Support.....	10

Step One: Issue A New Card

1. Get a new card from your stack of unused cards
2. Make a Mental note of the client's balance on their old card
3. Log Into the admin area
4. Roll your mouse over Programs > Cards Sets
5. Click View Card sets



6. Click View Cards

CARD SET ID	SET NAME	QUANTITY	VOUCHER			
47	Candice's Store Cards	17	False	View Cards	View/Edit	Delete
48	Candice's Store Test cards	0	False	View Cards	View/Edit	Delete

- Type in the old card number to search for the client

Card Number:

Program:

Card Set:

View Available Cards Only:

- Once Found Click View/Edit

Candice's Store	Candice's Store Cards	997456354890003	Amanda	Jane	27845551056	View/Edit	Delete
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- Click the cards tab at the top left hand side

- Click Add New Card

Customer Cards

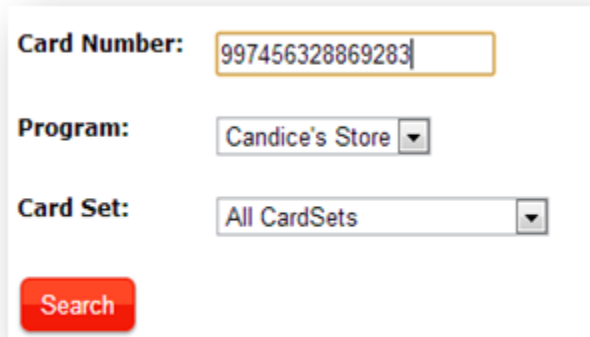
Card Number:

Program:

Card Set:

PROGRAM	CARD SET
Candice's Store	Candice's Store Cards

11. Type in the number on the card > Click Search



Card Number:

Program:

Card Set:

12. Click Add

CARD ID NO	
997456328869283	Add Card

13. Click the small red cross to exit the screen
14. To see if the card number was added to the clients details Roll your mouse over Programs > Cards Sets
15. Click Cards



16. Type in the new card number and click search

Card Number:

Program:

Card Set:

View Available Cards Only:

17. The new card number with the customer's details will appear. (if the screen is blank it means the details were not added to the card number)

Step Two: Transfer Points To The New Card

Now that the customer has their new card you need to transfer their points from their lost/stolen card

1. Open up a new tab in your browser
2. Go to <http://webterminal.theloyaltybox.com/>
3. Type in your location ID > Click Login twice
4. Click Transfer



5. Fill in info as follows
 - a. From Account Number: the lost/stolen card
 - b. To Account Number: The new card just issued
 - c. Transaction amount: the same amount of points that were on the old card
 - d. Value Type: Points
6. Click Transfer

A screenshot of a web form titled "Transfer" in red. The form contains four input fields and a dropdown menu. The first field is labeled "From Account Number:" and contains the value "997456354890003". The second field is labeled "To Account Number:" and contains the value "997456328869283". The third field is labeled "Transaction Amount:" and contains the value "20". The fourth field is labeled "Value Type:" and has a dropdown menu with "Points" selected. A blue "Transfer" button is located at the bottom of the form.

Transfer

From Account Number:
997456354890003

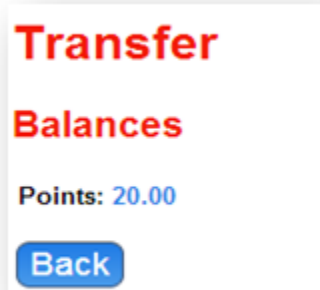
To Account Number:
997456328869283

Transaction Amount:
20

Value Type:
Points

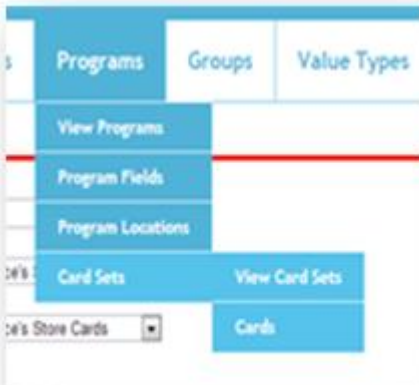
Transfer

7. This screen will come up if the transfer was successful



Step Three: Cancel The Old Card

1. Go back to the admin area
2. Roll your mouse over Programs > Cards Sets
3. Click Cards



4. Search for the new card number as in Step One number 15
5. Click View/edit > Click Cards
6. Click "Remove" next to the old card

PROGRAM	CARD SET	CARD ID NO		
Candice's Store	Candice's Store Cards	997456354890003	6 Transactions	Remove
Candice's Store	Candice's Store Cards	997456328869283	0 Transactions	Remove

Support

If you have any questions, please contact The Loyalty Box.

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