



Version 1

Admin Area – Transferring A Card

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

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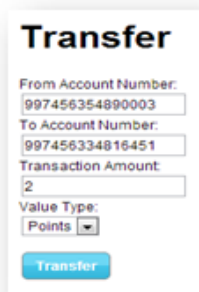
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Step One: Web Terminal

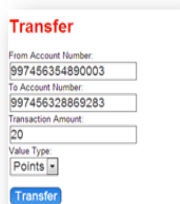
Transfer Points. Do a balance enquiry on the old card number to check points



1. Fill in info as follows
 - a. From Account Number: the card number you want to transfer points from
 - b. To Account Number: The card number you want to transfer the points to
 - c. Transaction amount: the amount of points you want to transfer
 - d. Value Type: Points



2. Click Transfer



Step Two: Admin Area

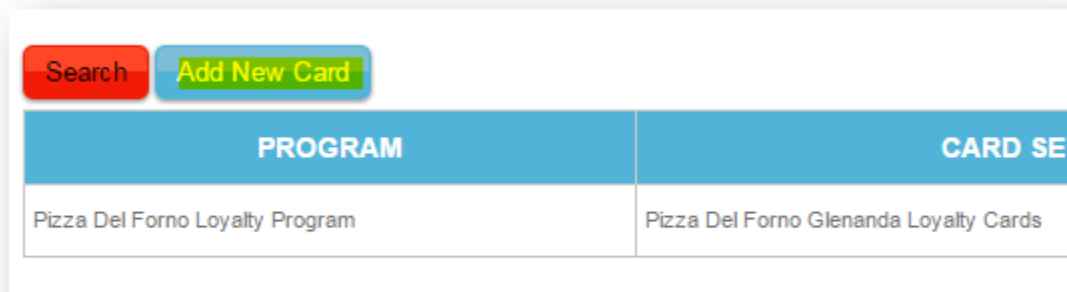
Log into admin area and transfer card history

1. Scroll mouse over Clients → Click Customers → Search for old card number → Select View/edit (highlighted)



| PROGRAM NAME | FIRSTNAME | MIDDLE NAME | LAST NAME | PHONE NUMBER | STATUS | DATE CREATED | | |
|---------------------------------|-----------|-------------|-----------|--------------|---------|--------------|------------------|------------------|
| Pizza Del Forno Loyalty Program | Maureen | | Curtbert | | Enabled | 2014-04-01 | View/Edit | Disable Customer |

2. Click Customer Cards tab → Click add new card



| PROGRAM | CARD SET |
|---------------------------------|--|
| Pizza Del Forno Loyalty Program | Pizza Del Forno Glenanda Loyalty Cards |

3. Type in new card number → Click Search → Click add card
4. Click Customer transfer
5. Select date range 2 years back
6. Click refresh details
7. Select old card number in first column and new card number in second column
8. Click Transfer → Click Save

Support

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

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