



Version 1

Web Terminal – How To Guide

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

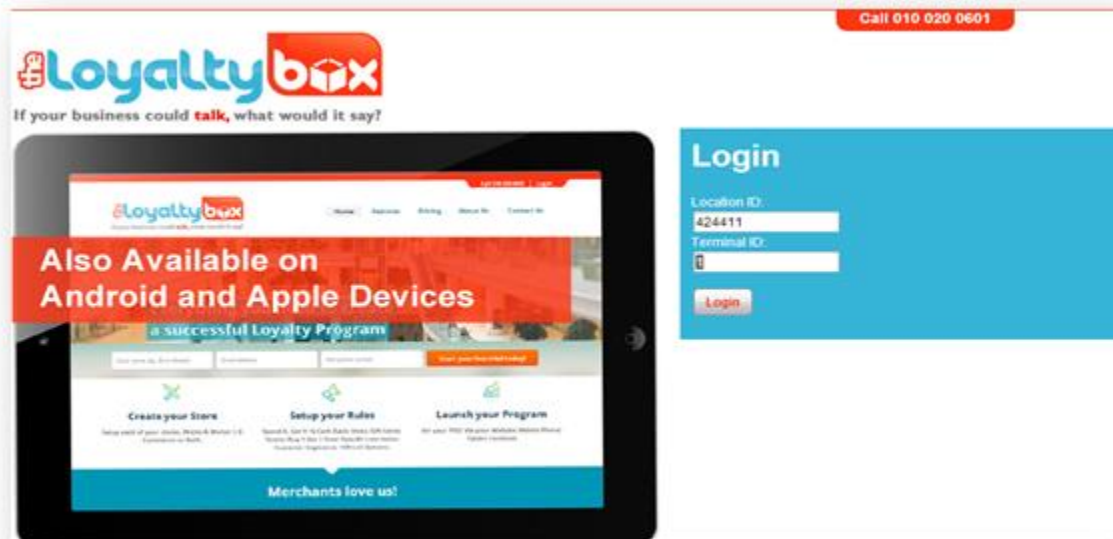
Table of Contents

| | |
|------------------------------------|----|
| Logging onto the Web Terminal..... | 3 |
| Adding a New Customer..... | 4 |
| Capturing a Sale..... | 6 |
| Conducting a Balance Enquiry..... | 7 |
| Issuing Currency/Points..... | 8 |
| Redeem Currency/Points..... | 9 |
| Transferring Currency/Points..... | 10 |
| Support..... | 12 |

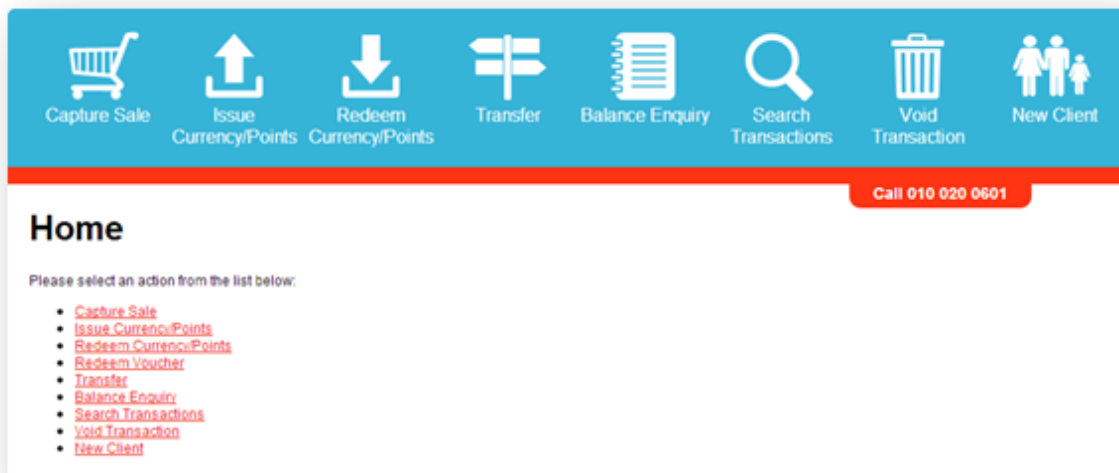
Logging onto the Web Terminal

Open up your web browser, and go to: <http://webterminal.theloyaltybox.com>

1. Enter in your Location ID and fill in "1" in Terminal ID
2. Click Login TWICE



That will bring you to the below page.



Adding a New Customer

1. Click "New Client"



2. Fill in relevant details as below

New Client

Step 1 of 3: Client Details

Account Number:

First Name:

Surname:

Cell Number:

Email:

Gender:

Date Of Birth e.g. 2012/01/01:
Year Month Day

New Client

Step 2 of 3: Client Address

Address 1:

Address 2:

City:

Postal Code:

Country:

New Client

Step 3 of 3: Marketing

Marketing:

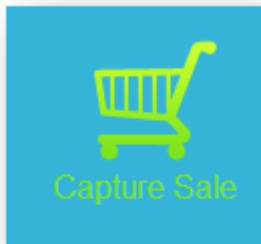
Accept Email Marketing

Accept SMS Marketing

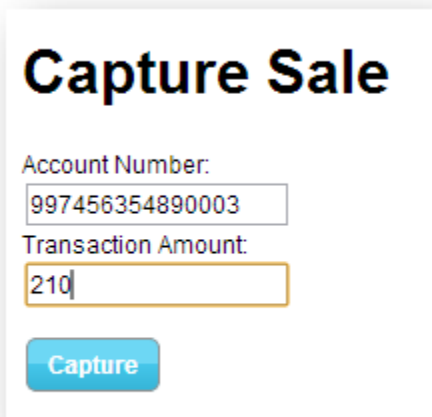
Accept Phone Calls

Capturing a Sale

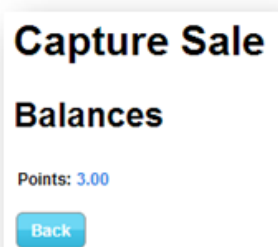
1. Click "Capture Sale"



2. Enter in the details of the sale
 - a. Account Number: Loyalty Card Number
 - b. Transaction Amount: Amount of Sale
3. Click "Capture"

A white rectangular form with a blue border. At the top, it says "Capture Sale" in bold black text. Below that, it has two input fields: "Account Number:" with the value "997456354890003" and "Transaction Amount:" with the value "210". At the bottom, there is a blue button labeled "Capture".

4. Customers Balance will Show on the screen

A white rectangular form with a blue border. At the top, it says "Capture Sale" in bold black text. Below that, it says "Balances" in bold black text. Underneath, it displays "Points: 3.00" in blue text. At the bottom, there is a blue button labeled "Back".

Conducting a Balance Enquiry

1. Click "Balance Enquiry"



2. Enter in the Loyalty Card number > Click Balance Enquiry.

A screenshot of a web form titled "Balance Enquiry". It features a text input field labeled "Account Number:" containing the number "997456354890003". Below the input field is a blue button labeled "Balance Enquiry".

Balance Enquiry

Account Number:
997456354890003

Balance Enquiry

3. Balance on Card will show on next screen.

A screenshot of a web page titled "Balance Enquiry" showing the result. It displays the heading "Balances" and the text "Points: 3.00". A blue button labeled "Back" is located at the bottom.

Balance Enquiry

Balances

Points: 3.00

Back

Issuing Currency/Points

1. Click "Issue Currency/Points"



2. Add in the details of the transaction
 - a. Account Number: Loyalty card Number
 - b. Transaction Amount: The amount you want to add to the card
 - c. Value Type: Select Points > Click Issue

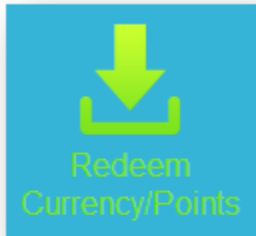
A screenshot of a web form titled "Issue Currency/Points". It contains three input fields: "Account Number" with the value "997456354890003", "Transaction Amount" with the value "10", and "Value Type" with a dropdown menu set to "Points". A blue "Issue" button is at the bottom.

3. The customers new balance will show

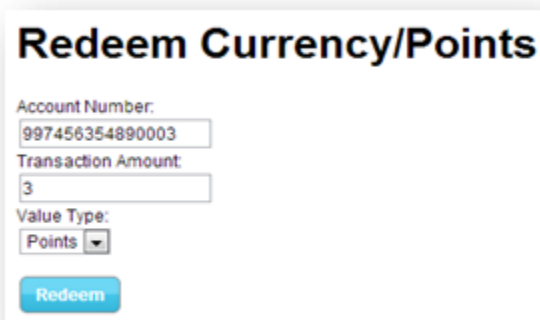
A screenshot of a web page titled "Issue Currency/Points" with a sub-section "Balances". It displays "Points: 13.00" in blue text and a blue "Back" button below it.

Redeem Currency/Points

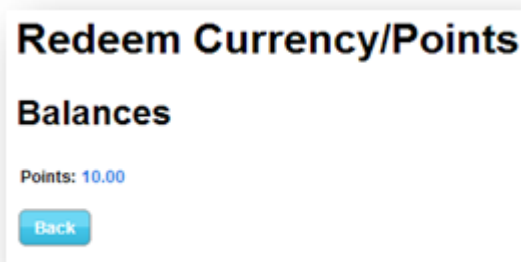
1. Click "Redeem Currency/Points"



2. Add in the details of the transaction
 - a. Account Number: Loyalty card Number
 - b. Transaction Amount: The amount you would like to Redeem off the card
 - c. Value Type: Select Points > Click Redeem

A screenshot of a web form titled "Redeem Currency/Points". The form contains the following fields: "Account Number:" with a text input field containing "997456354890003"; "Transaction Amount:" with a text input field containing "3"; and "Value Type:" with a dropdown menu set to "Points". A blue "Redeem" button is located at the bottom of the form.

3. The cards new balance will show on the screen

A screenshot of a web page titled "Redeem Currency/Points" showing the "Balances" section. It displays "Points: 10.00" in blue text. A blue "Back" button is located at the bottom left of the page.

Transferring Currency/Points

1. Click "Transfer"



2. 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

A screenshot of a web form titled "Transfer". The form contains the following fields: "From Account Number:" with the value "997456354890003"; "To Account Number:" with the value "997456334816451"; "Transaction Amount:" with the value "2"; and "Value Type:" with a dropdown menu set to "Points". A blue "Transfer" button is located at the bottom of the form.

Transfer

From Account Number:
997456354890003

To Account Number:
997456334816451

Transaction Amount:
2

Value Type:
Points ▾

Transfer

2. Click Transfer

Transfer

From Account Number:
997456354890003

To Account Number:
997456328869283

Transaction Amount:
20

Value Type:
Points ▾

Transfer

3. This screen will come up if the transfer was successful with the amount of points that were added

Transfer

Balances

Points: 20.00

Back

Support

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

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