

**stickystreet<sup>®</sup>**



## About the Loyalty Platform

A World Leading Loyalty Engine

# Everything you need is provided in the cloud



## API Driven

Our API Driven Platform as a Service allows you to quickly implement meaningful customer engagement solutions.



## Turn-key and modular

Create and manage in-house loyalty and stored value (gift card) programs under your own private label brand.



## Powerful yet Flexible

With over 7 campaign styles, including points, Buy x Get X, Two-Tier and even Coalitions the power is in your hands, on the cloud, or on any mobile device.



## Localized

We are global, businesses all over the globe use the technology in their own language and currency.



## Web Based Cloud Solution

The API platform allows you to manage your client's accounts from anywhere in the world. In the Cloud, it works with any browser, operating system, terminal, or mobile device.



## Secure

We maintain the data and integrity of the system, additional features and more -there's nothing for you to worry about. Safety and integrity of data is all-important to us. Your information is safe and secure.

Many businesses build their products on our platform and every precaution is taken to protect your data. We don't rent or sell your client's info.



## Mobile Friendly

Clerk and Customer mobile responsive web applications are available. Agencies use them and/or integrate into their existing client's applications.



## Fully Customizable

Customize your client loyalty program to be as unique as their business. Create, customize, brand and maintain an engaging loyalty program in a matter of hours.

# Out of the box!

## ✓ Robust APIs

- Easy configuration & extension
- 90+ APIs available
- Explore the APIs @ <http://api.clienttoolbox.com>
- Build your own interface and/or integrate into your existing solution.

## ✓ Agency Reseller Portal

- Create and manage their client accounts,
- Online support system
- Access tools available

## ✓ Client Administrator Portals

- Easy to use for corporate, regional, business line and franchise systems
- Campaign design, management and tracing reporting

## ✓ Multiple Languages & Currencies

- Multilingual solution supporting 12 languages
- Easily customized for local language

## ✓ Multiple Roles & Permissions

- Extensive administrative & permission-based roles
- Access to reporting and campaign management

## ✓ Merchant Mobile Web App.

- Allows for merchant to access via mobile devices using any browser.

## ✓ Merchant Portals

- Open source merchant self-hosted, mobile responsive, web-based solution that allows anyone to fully customize it.
- Customer Check-in portal (e.g. customer enters phone number and a visit is recorded with a set amount of points).

## ✓ Customer Portals

- Hosted mobile responsive, web-based customer portal
- Set it up in just minutes
- Open source merchant self-hosted, mobile responsive, web-based solution that allows anyone to host it and customize it

## ✓ Balance Lookup & Online Enrollment

- Simple Balance Lookup and Online enrollment links will allow simple setup in any client website.
- Simple registration and balance look-up for WordPress sites.

## ✓ Online Support

- Ticket based online support for your agency
- Every answer and or request is answered within 24hrs.
- Additional support via email or phone is provided, too.

## ✓ Agency Network

- Meet successful agency partners in other countries or markets that have created and develop on top of our platform. Get the customization that you are looking for from one of them or simply expand your network.

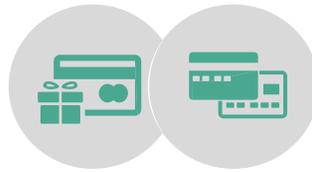
# Loyalty Program Styles

A highly customizable group of program styles is provided. You can pick and choose the ones that best suit your needs.



## Points & Rewards

Traditional programs allow merchants to assign points based on variable such as amount spent, products purchased, in-store promotions, etc. Merchants determine point value & customer reward.



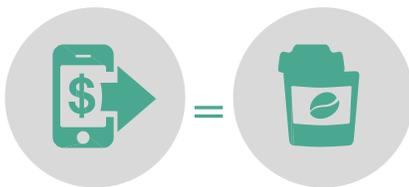
## Gift Card/Stored Value

Traditional plastic gift card program, or go virtual through a mobile or online stored value account.



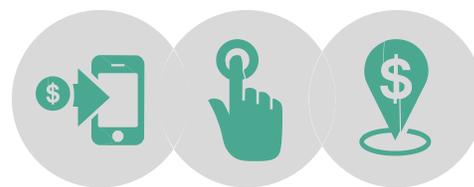
## Events Based

Merchants define rewards based on the interactions customers have with the business, such as number of visits or check-ins, rather than money spent.



## Buy X Get 1 Free

A classic program rewarding customers with free items based on a defined number of times they purchase a specific product or service.



## Earn Money Per Event

Customers earned stored value monetary rewards when performing the merchant's targeted actions, such as customer referrals, participating in a survey or product test, etc.



## Multi-merchant Programs

Use the multi-merchant account programs that suits your needs without the worry of being charged based on the number of merchants and/or participating locations.

- ✓ Coalition
- ✓ Two-Tier Account

# Coalition Program

Allows for unlimited businesses and/or locations to participate in a single group program where consumers can visit any of the locations, earn or redeem points/visits or stored value at any time. In this program consumers keep a single balance that can be used at any of the participating businesses. This program is designed for administrators to easily create and manage all the participating businesses, their rewards, promotions, and users.

## Features

- ✓ Setup and participation for multiple businesses /locations
- ✓ Participating customers have a Single Coalition Balance
- ✓ Each participating business/location can have their points ratio
- ✓ Each participating business/location can have their own rewards and promotions
- ✓ Customers enroll or register only one time (at any of the locations or online)
- ✓ Customer ID(s) can be define for anyone to easily find the customer account
- ✓ Customers can earn and redeem at any participating location
- ✓ Reporting for easy reconciliation available

## Campaigns supported in this program:



Points & Rewards



Gift Card/Stored Value

## Example

---



Pizza = 20 points



Shoes = 100 points



Haircut = 30 points

=

Balance  
150 pts

# Two-Tier Program

Allows for unlimited businesses and/or locations to participate in a single group program where consumers can visit any of the locations to enroll, earn and redeem points. In this program consumers have multiple balances (one per business) and they need to go back to the same business where they have earned the points in order to redeem them for rewards. This program is designed for administrators to easily create and manage all the participating businesses, their rewards, promotions, and users.

## Features

- ✓ Setup and participation for multiple businesses /locations
- ✓ Participating customers have multiple balances (one per business)
- ✓ Each participating business/location can have their own points ratio (e.g. 1 point per dollar)
- ✓ Each participating business/location have their own rewards and promotions
- ✓ Customers enroll or register only once (at any of the locations or online)
- ✓ Customer ID can be defined (e.g. phone number) for businesses to easily find a customer account and record the visit
- ✓ Customers can earn and redeem at any participating location. However, the balance stays at the business (e.g. If a customer gets 500 points at business “A” they have to go back to that same business (“A”) to redeem or earn more points).
- ✓ Reports

## Example

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### Town Rewards



Pizza = 20 pts



Shoes = 100 pts



Haircut = 30 pts

=

### Balances

**Pizza = 20 pts** (redeemable at Pizza only)

**Shoes = 100 pts** (redeemable at Shoes only)

**Haircut = 30 pts** (redeemable at Haircut only)

**Town Rewards = 15 pts** (redeemable at Town Rewards only)

(This is the 2nd Tier = % Contribution of all accumulated pts)

# Some program examples created with our platform

## ● Basic Points Program

Customers earn points based on the amount of pre-tax purchases. Merchant determines a product or service they want to promote and offer the product/service as a reward based on amount of points earned.

## ● Non-Monetary Points Program

Using the “promos” capability, a business defines things a customer can do to earn points by adding “+ promos”. Example – Bible Bucks program gives +10 points for doing a good deed and +5 points for memorizing a Bible verse.

## ● Basic Gift Card Program

Customer buys a gift card for someone else. That person receives the gift card and uses the amount of credit on the card to make purchases.

## ● Referral Program

Points: People or employees who refer new customers are given points they can redeem for discounts, free products/services or VIP status.

Money: People or employees who refer new customers are given a certain “bounty” they can use at the store as credit for purchases.

## ● Basic Visit-Based Program

Customer accumulates “visits” each time they visit the merchant. A schedule provides options of rewards based on number of visits. Example – After 10 visits, you can get a free product. Or keep accumulating visits and after 20, get a different free product.

## ● Pre-Loaded Stored Value Program

Customer is incentivized to pre-pay into a stored value card that can be used at a merchant location by receiving extra money on the card. Example – purchase \$100 pre-loaded card and get a bonus \$5 to spend.

## ● Buy X Get One Free Program

A specific item is defined along with the number of times the item must be purchased to earn a free item. Example – A coffee shop may have a “buy 10 coffees get one free” or “buy eight cookies, get one free.”

## ● Tab Program

Using a stored value campaign, businesses like bars that extend tabs to customers can add to a balance that represents what the customer owes the business. The balance is reduced when customer pay all or a portion of the accumulated balance.

## ● VIP Program

Using an event or points program, define lifetime-accumulated balances to provide tiered benefits (e.g.: Gold Member). Use the “x promo” to define multipliers for accruals. Example – earn 100,000 points and become a Gold Member; customer earns 2x points on purchases.

## ● Third-Party Fulfillment

Merchants can integrate with third-party fulfillment so the points (or visits/events) earned can be redeemed for a list of products made available and shipped by the third-party fulfillment warehouse.

## ● Charity Choice Program

Using three points campaigns in three different accounts, a single transaction in a participating location (each location has one campaign in each of the three accounts) is split into three API calls that “fund” the three campaigns. That is usually split with 80% going to the stores’ loyalty program, 15% to an account where the customer donates to a charity of choice and the remaining 5% to the program organizer’s profit.

## ● Gyms/Spas Membership Program

Using the Buy X campaign, the receptionist pre-loads the amount of services and products a customer purchases (e.g.: platinum membership gets 10 free massages, 2 free salt wraps and one bathrobe). When the customer comes in and wants to redeem a service/item, the receptionist deducts from their balance.

## ● Miles Program

Use a points campaign, call it miles, and determine mile expiration based on last transaction (rolling expiration) or based on the date of earning item (use them or lose them).



## Users & Permissions

The platform allows for the administrator to create and manage program users and their permissions. A user can be a business owner, a manager, a clerk, or an API user. Users can be allowed to all or a particular program/campaign.

Role	Permissions
<b>Administrator</b>	Has access to everything.
<b>Manager</b>	Has access to everything within allowed campaigns and limited access to account-wide settings (Can't view billing info, can generate reports, and can add or edit but not delete account users.
<b>Agency Client</b>	Manager, with ability to edit campaign settings, users, and run reports, but not the ability to add campaigns, account users, nor delete or import customers.
<b>Agency Client + Imports</b>	Manager, with ability to edit campaign settings, users, run reports, and manage customers (delete, import), but not the ability to add campaigns or account users.
<b>Campaign Manager</b>	Has access to everything within allowed campaigns and limited access to account-wide settings (Can generate reports, can't view billing info, can't manage users, can't create or delete campaigns.)
<b>Associate Manager</b>	Can manage rewards and promotions within allowed campaigns, and manage all aspects of customer information and visits.
<b>Clerk</b>	Within allowed campaigns, can create & edit customer's info (but not change their card #, if assigned) and only record & redeem customer visits (but not delete any.)
<b>Temp</b>	Within allowed campaigns, can only create new customers, and only record customer visits
<b>Fulfillment Contractor</b>	Within allowed campaigns, can only redeem customer rewards
<b>Accountant</b>	Can generate reports, view account billing info and campaign settings, but cannot view user and customer info
<b>Observer</b>	Can view user & customer info and certain campaign settings (rewards and promotions.)

**Need a custom role? No problem, give us a call.**

# Key Components

Here are 7 components of the platform that will help understand quickly what's the out of the box offering:



## Agency Toolbox

Everything you need to create and manage your client's accounts is provided. From your own agency toolbox to easy links and widgets to setup a customer balance lookup in minutes.



## Client Toolbox and Client Portal

This easy to use interface allows you to be the administrator of any of your client's loyalty programs. Choose to give them full access to this interface and let them set up and manage their own program, or be the administrator they need to launch a successful program.



## Transaction Recording

Get your clients setup in minutes with any of our ready to use web interfaces, customize and host your own clerk interface, or integrate any 3rd party service.



## API

The platform is unrivaled by anyone in the world for one simple reason: Our robust and powerful API. Using the API the opportunities are unlimited for your agency. Go after the smallest turn key client, or integrate our platform into any other API accessible product and go big!



## Merchant Access

Get your clients setup in minutes with any of our ready to use clerk web interfaces, customize and host your own clerk interface, or integrate the platform with any 3rd party service.



## Customer Access

Every business and industry might be looking for something different when it comes to customer experience. Set up a balance look up in minutes, take a few hours to host and customize a customer web portal for consumers to be able to login and interact with the loyalty program, or use the APIs to integrate into any existing mobile application or e-commerce solution.



## Reporting

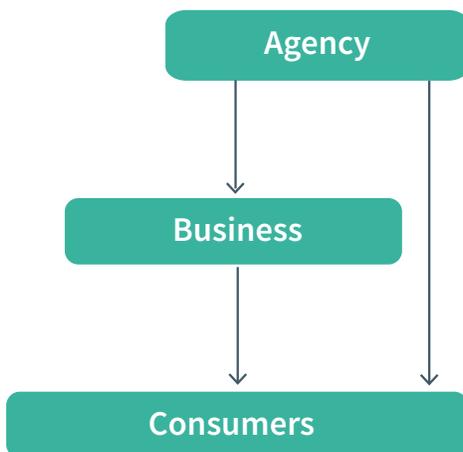
Data is key, that's why the reporting component is so important. Reports from details of daily transactions to lists of customers have not been back in a period of time are available. All information can be exported.

# Agency Toolbox

Everything you need to create and manage your clients' accounts is provided. From your own agency toolbox to easy links and widgets to setup a customer balance lookup in minutes.

Account ID	Business Name	Customers	Client Notice
demo_so	Demo SO	5	
demo_ustwotier	Demo Two-Tier	3	
demo_ged	Ged Demo Account	2	
demo_afteraws	Demo test aster Aws	0	Custom Message Here!
demo_star	Demo RStar	0	
demo_uscoalition	Demo Coalition	0	

- ✓ Balance Lookup
- ✓ Online Enrollment
- ✓ Client Login Links
- ✓ Points Calculator
- ✓ API Documentation
- ✓ Active & Trial Accounts
- ✓ New Client Creation
- ✓ Suspend/Delete Clients
- ✓ Online Ticket Support System



- ✓ Business to Business
- ✓ Business to Consumers
- ✓ Coalition Program
- ✓ Two-Tier (Mall) Program

# Client Toolbox

Anyone, from the agency, the business owner, manager, clerk or an accountant can use this while label interface to interact with the loyalty platform. Everything you will see here can be done with APIs, but we like to have it available for anyone to administer programs, resell, or just use it as a sandbox.

## Features:

- ✓ Manage Account Settings
- ✓ Manage Campaigns
- ✓ Import Customers
- ✓ Record Transactions
- ✓ Import Transactions
- ✓ Generate Reports
- ✓ Manage Customers
- ✓ Export Data
- ✓ Manage Custom Fields
- ✓ Manage Users & Permissions

The screenshot displays the Client Toolbox interface with several key sections:

- Business Name:** Hello, Edgar Arana. Jump to: Account Control Panel (Go)
- Account Information:** Edit button. Business Name: Business Name, Account Owner: Edgar Arana, Address: Washington, DC 20010 US, Owner Contact: edgar@stickystreet.com 000-000-0000.
- Customers:** 12. Manage Customer Records, Manage Custom Fields.
- Campaigns:** Table with columns: Campaign Name, Campaign Customers, Campaign Transactions, Customers, Campaign Status, Campaign Preferences.
 

Campaign Name	Campaign Customers	Campaign Transactions	Customers	Campaign Status	Campaign Preferences
Buy X Get 1 Free	1	5	Add Lookup	Deactivate	Edit
Gift Card	0	0	Add Lookup	Deactivate	Edit
Loyalty Club (Points)	12	13	Add Lookup	Deactivate	Edit
- Import Customers and Transactions:** Import Customers, Import Customer Transactions. Previous Imports: 2017-07-17 09:48:58, 2017-07-17 09:48:23, 2017-07-17 09:41:43, 2017-07-17 09:36:41. Previous Imports: 2017-06-14 17:02:10, 2017-05-02 17:36:00, 2017-04-11 19:03:31, 2017-04-11 18:59:58.
- Support Links:** US Demo Age, Email Address: edgar.arana@mozido.com, Phone Number: 444-000-0000.
- Select Data Fields to Manage:** Customer Fields, Transaction Fields.
- Reward Levels:** Table with columns: Points, Reward Description.
 

Points	Reward Description	Edit
150	Reward A (\$15)	Edit
250	Free Lunch	Edit
1,500	Free Night	Edit
50,000	Disney Trip	Edit
- Promotions:** Table with columns: Operation, Promotion Description, Date Range.
 

Operation	Promotion Description	Date Range	Edit
+100	Night	2017.08.28 to 2027.09.28	Edit
+50	Signup Bonus Points	2017.03.20 to 2018.04.20	Edit
x2	VIP Member	2017.03.20 to 2018.04.20	Edit
- Manage Authorized Users and their permissions:** Hide button. Table with columns: User, Role.
 

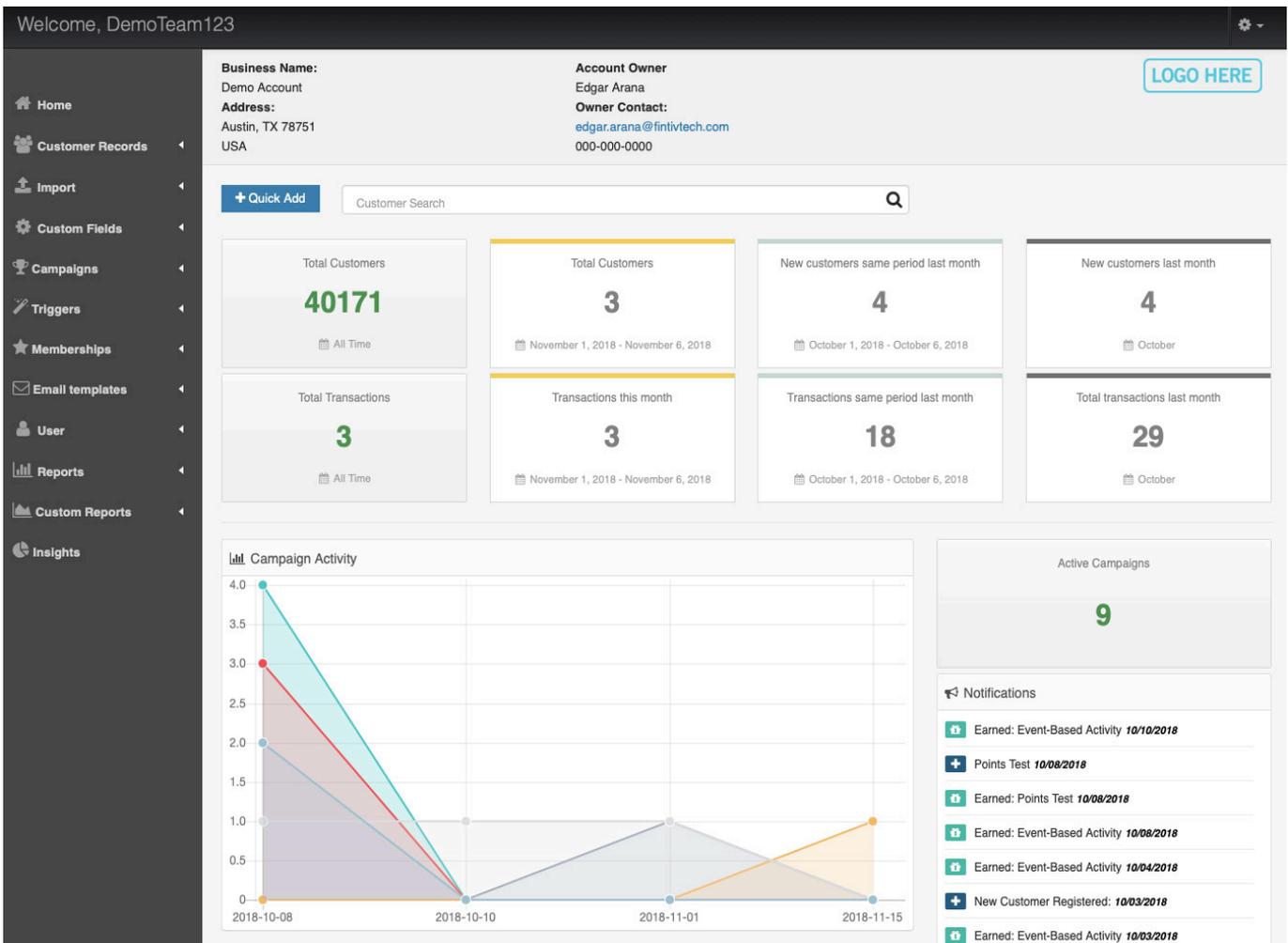
User	Role	Edit
nelson_clerk	Clerk	Edit
any_business_api	Administrator	Edit
Shiwani	Administrator	Edit

# Client Portal

Think of it as the ClientToolbox in steroids. With this new interface you will be able to provide your clients with a more sophisticated and user friendly Loyalty Dashboard that will allow them to track the performance of their loyalty program.

## Features:

- ✓ Manage Account Settings
- ✓ Import Customers
- ✓ Import Transactions
- ✓ Manage Customers
- ✓ Manage Custom Fields
- ✓ Manage Campaigns
- ✓ Record Transactions
- ✓ Generate Reports
- ✓ Export Data
- ✓ Manage Users & Permissions
- ✓ Manage Email Templates
- ✓ Manage Memberships
- ✓ Manage Triggers

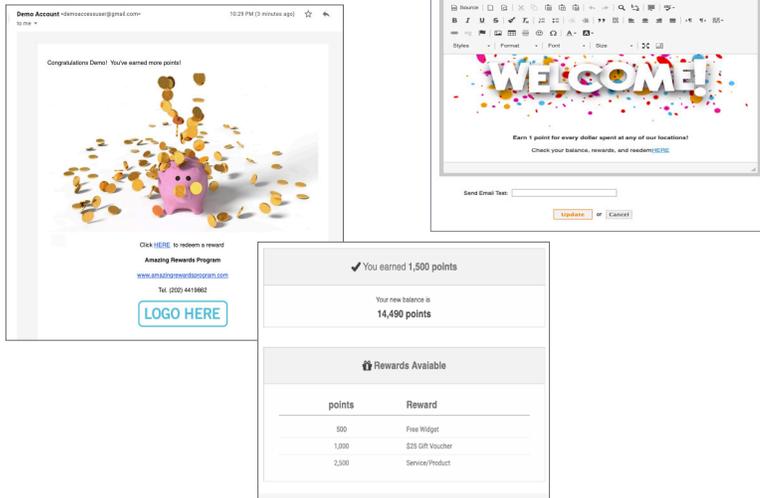


# Some nice features!

## Custom Transaction Emails

Customize the emails that your customers receive when they:

- Enroll/Register in the program
- Purchase/visit
- Redeem Rewards



## Custom Transaction SMS

Customize text messages that your customers receive when they:

- Enroll/Register in the program
- Purchase/visit
- Redeem Rewards

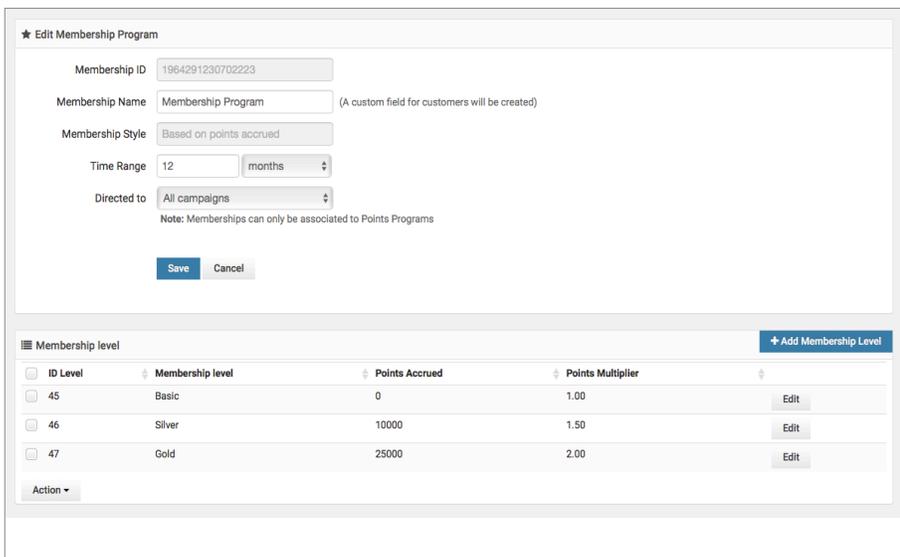


## Memberships

Create great membership programs with multiple membership levels.

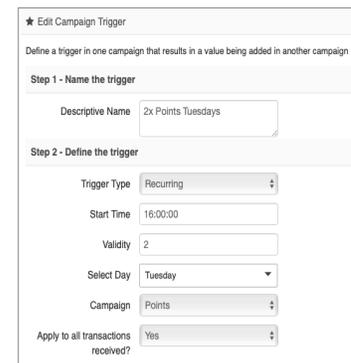
Example:

- Basic at enrollment
- Silver 1.5x bonus points 10,000 pts to qualify
- Gold 2x bonus points 25,000 pts to qualify



## Triggers

- ✓ Automate bonus points during specific days/hours (e.g. 2x Points Tuesdays between 4-6pm)
- ✓ Load a reward in a customer account when they achieve a points/visits threshold
- ✓ Setup and track a contribution towards a charity cause, or use it to track a cash-back.
- ✓ Other creative triggers





# Transaction Recording

Transaction Recording is the heart of a successful loyalty program, without the right method there is big chance of failure. Every businesses is different, every industry is different, we cannot force you to use “our app” or to pay for an integration that only we can do. We rather like to give multiple options for you to choose the right one for the type of client that you are targeting. Yes, we are not perfect and there is no such thing as magic, but our technology is that flexible.

## Methods Supported:

Web Dashboard	✓
Mobile Responsive Clerk Web Application	✓
Mobile Responsive Custom Web Clerk Portal	✓
Real Time API Transactions	✓
Manual Batch Upload	✓
Batch Processing APIs	✓
Custom Batch File Upload & Processing*	✓
Custom Integration to POS/System*	✓

\*Per Statement of Work

# API Documentation

The API documentation is published at <http://api.clienttoolbox.com> for your developers or any of your clients to access it.

Here's what you should know about the API:

- ✓ API stands for Application Programming Interface
- ✓ It's a comprised of a set of methods that allows users to quickly develop and deploy custom loyalty applications.
- ✓ The API allows other programs and hardware to interface with the loyalty platform directly, without having to go through a browser, allowing you to integrate transactional steps into mobile, web, or desktop applications.
- ✓ API Protocol? It's an HTML POST request. Same thing as submitting a form on a web page and can be done in any programming language or script. The resulting data however is either XML or JSON.
- ✓ You can use the API to:
  - Integrate with a POS system.
  - Design your own mobile application.
  - Program your own email, sms, or custom marketing and customer relations application.
  - Automate the recording of transactions based on your own triggers.
  - Integrate with other SaaS online applications for a seamless enterprise solution.

## API Based Integration? The world is your oyster!



### API DOCUMENTATION

Last Update: Wed, Mar 5, 2014

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**Premiere Access**  
[Enterprise-Level API Calls](#)

**API Calls**  
[Overview](#)

Clients (Businesses)  
[Account - Update](#)  
[Account - Info](#)  
[Dashboard - Info](#)

Custom Fields  
[Customer Field - Create](#)  
[Customer Fields - List](#)  
[Customer Field - Update](#)  
[Customer Field - Delete](#)  
[Transaction Field - Create](#)  
[Transaction Fields - List](#)  
[Transaction Field - Update](#)  
[Transaction Field - Delete](#)

Users (Business Employees)  
[User - New](#)  
[User - Update](#)  
[Users - List](#)  
[User - Info](#)  
[User - Delete](#)

**Overview**  
This API allows other programs and hardware to interface with the loyalty platform directly, without having to go through a browser, allowing you to integrate transactional steps into mobile, web, or desktop applications.

You can use this API to:

- Integrate with a POS system.
- Design your own mobile application.
- Program your own email, sms, or custom marketing and customer relations application.
- Automate the recording of transactions based on your own triggers.
- Integrate with other SaaS online applications for a seamless enterprise solution.

**API Access URL**  
Requests can be sent to the main API uri:  
`https://api.clienttoolbox.com`

NOTE: Notice the "s" in https – Connections to the API **must** be through encrypted SSL, in order to protect the sensitive nature of your data.

You can also use your vanity or domain-mapped domain, **but** with **"api.php"** as the destination to send the requests to (and **not** "admin.php".) For example:

- Take a look at the URL used to access your Control Panel. It is likely to be something like:  
`https://sub.domain.com/admin.php`
- Now, replace the "admin.php" with "api.php" like this:  
`https://sub.domain.com/api.php`

There is no difference in speed accessing either URLs, although domain-mapped URLs may take slightly longer due to the additional DNS hop. Generally, we recommend you use the main API url unless you have a specific reason to use your vanity or domain-mapped domain.

# Merchant Access

There is no right or wrong way to use the technology, it all comes down to client needs and time lines. That's why we've created a set of interfaces that allow you to quickly set up a loyalty program for any of your clients so they can launch their program and start recording customer visits. **Multiple user roles and permissions are available.**

## Client Portal

### Clerk Role Features:

- Add Customer
- Lookup Customer (phone, card #, any other info)
- Register Customer Purchase/Visit
- Register Redemptions

The screenshot displays the 'Campaigns' section of the Client Portal. It features a search bar at the top with a '+ Quick Add' button and a 'Customer Search' input field. Below this, there are two main panels. The left panel shows the 'Gift Card Program' with a current balance of '\$100.00'. The right panel shows the 'Sunland Rewards' program with a current balance of '300 Points'. Below the Sunland Rewards panel, there is a 'New Activity' section with a green header, and a table of account activity. The table has columns for Trans. ID, Date, Activity, Points, (Amount), Recorded By, and Description. Two transactions are listed: one for 'Earned 300 Points' and one for 'Redeemed -1,000 Points'.

Trans. ID	Date	Activity	Points	(Amount)	Recorded By:	Description
293	2018-11-07	Earned	300 Points	USD 300.00	demo_so	x (Memb. Basic 1.00)
291	2018-11-07	Redeemed	-1,000 Points	-	demo_so	\$25 Gift Voucher

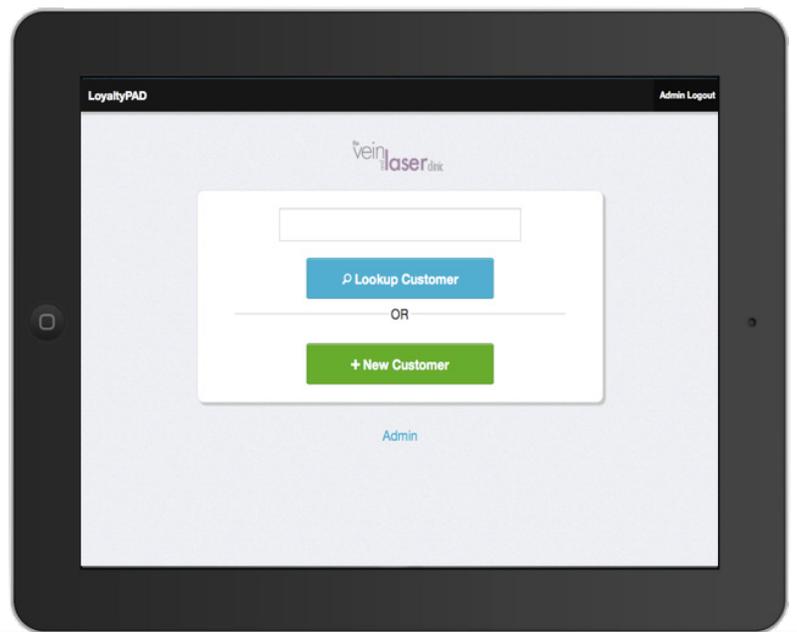
## PixiePad

### Administrator Features:

- Edit Language Translation
- Edit Campaigns and Interface Settings
- Activate Login by PIN mode

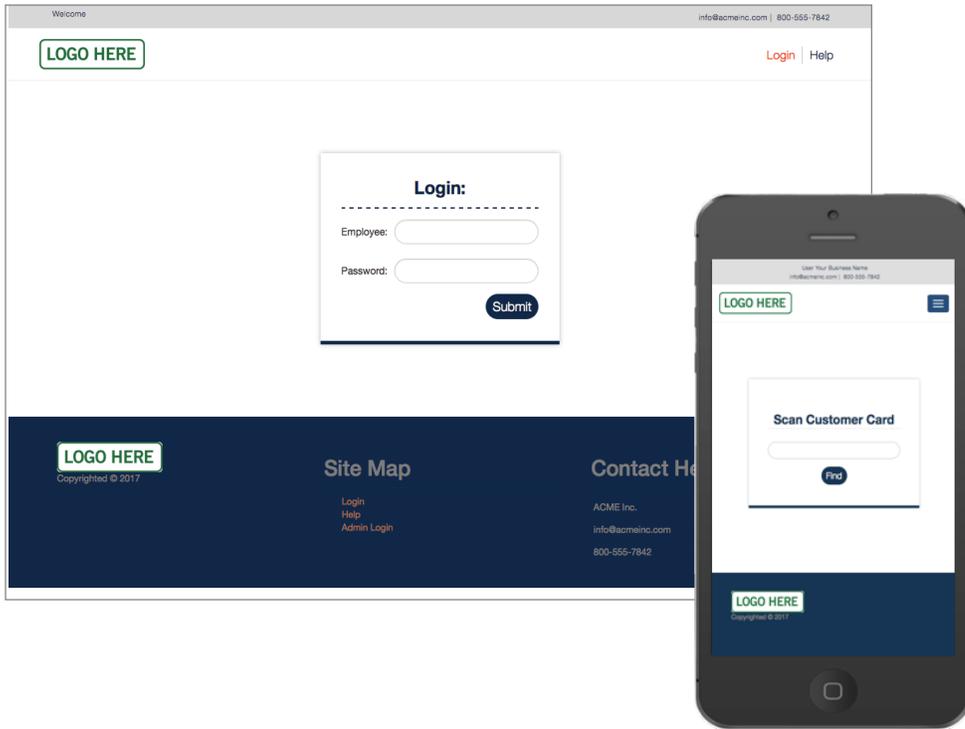
### Clerk Features:

- Login by PIN
- Add / Edit Customers
- Record Purchases/Visits
- Redeem Rewards



# Open Source Clerk Web Interface

If you are looking to create a unique look and feel for your clients you can do it with APIs or you are welcome to use the open source mobile responsive clerk web interface. Make it your own, add any business logic or customizations needed, and host it anywhere.



**Administrator:**  
 - Fully Customizable  
 - Host it Anywhere

**Clerk:**  
 - Add / Edit Customers  
 - Record Transactions  
 - Redeem Rewards

Do you rather build your own interface? No problem. We have APIs for you to create your own.

**Premiere Access**  
Enterprise-Level API Calls

**API Calls**  
Overview

- Clients (Businesses)
- Account - Update
- Account - Info
- Dashboard - Info**
- Custom Fields
- Customer Field - Create
- Customer Fields - List
- Customer Field - Update
- Customer Field - Delete
- Transaction Field - Create
- Transaction Fields - List
- Transaction Field - Update

**Dashboard Info**  
Show a client's (store's) account information:

The data to be submitted to the API is composed of the following fields:

field	Example	Note
API	1.5	Required
user_id	john1970	Required
user_api_key	1959caadac9b13dcb3	Required
account_id	greatwidgets	Required
type	dashboard	Required
most_active	10 (customers)	Optional
customer_count	Yes	Optional
total_customers_this...		
total_transactions_th...		
active_campaigns_cou...		

Welcome, DemoTeam123

- Dashboard
- Customers
- Import
- Campaigns
- Reports
- User
- Apps

Account Name: Your Business Name  
 Account ID: DemoTeam123

Phone Number: Array  
 Email Address: companyemail@here.com

**Example**

Customers Search

Card Number	Name	Total Number of Visits
3507759695656111		69
46204175	June9 user	14
1518244838215186	Edgar Arana	12
8900932548981170		12
8731755896418031		10

Customers: 24

Active Campaign: 2

Notifications: New Customer Registered: John Doe *Just now*

# Consumer Experience

Consumer experience is key to run a successful loyalty program. Many businesses think that they should have an app, others want plastic cards, and others want a complete virtual experience. Consumer access and experience varies per industry and per business. Before deciding what to use or create we strongly advise you to:

1. Understand your client's needs
2. Know and understand your client's target audience

Based on the above you can successfully create and setup effective methods and tools to fully engage your client's customers.

Here are some out of the box tools that you can use to enhance the customer experience. However, you are welcome to integrate loyalty into any existing consumer mobile application.

## Balance Lookup

### Quick balance lookup link

This is not the only balance lookup option you have, but it's the quickest.

**Loyalty Program Balance Lookup**

Enter your Account ID or Card #:

**Look It Up**

---

Account ID/Card #: **555**

**Balance: Pawlour Points**  
**60 Points**

Date	Points
2014-07-02	5
2014-07-02	55

**Rewards Available**

Amount	Reward
50	\$10 gift certificate for a friend
75	Free half-day of doggie daycare
100	Three pack of beef tripe sticks
125	Free full-day of doggie daycare
150	Beef marrow bone and beef tendon
175	Pet Corrector (50 ml)
250	Small sio-bowl feeder
300	Any size Ruffhide chew toy
325	\$25 off anesthesia free teeth clean

### Balance Lookup & Online Enrollment WP Plugin

If your client has a Wodpress site a plugin can be installed so their customers can enroll and lookup their balance.

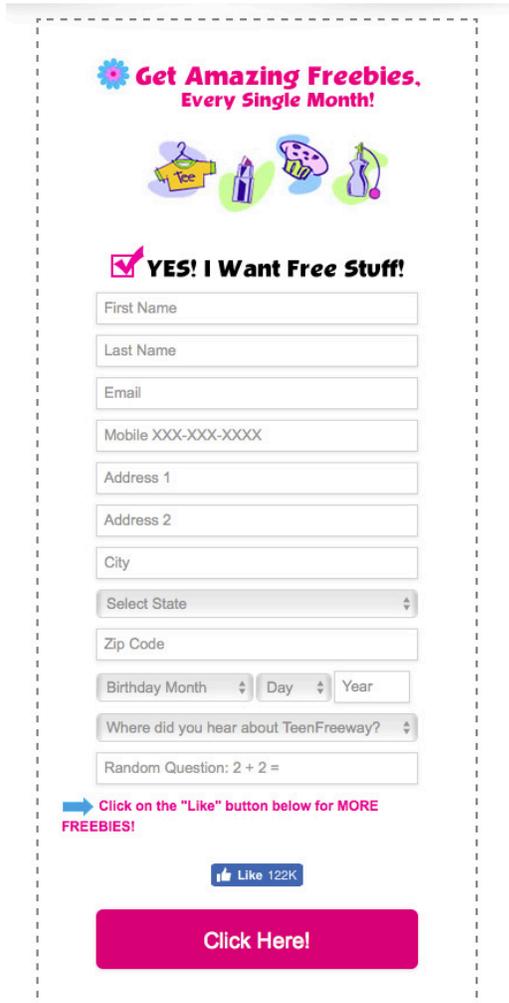
The screenshot shows the Renu Medspa website interface. At the top, there's a navigation bar with links for Home, About Us, Conditions, Services, Products, and Blog. The main content area features a section titled "The Card" with a description of the rewards program and a list of benefits. Below this, there's a "THE POINTS" section and a "THE RECRUITERS" section. On the right side, there's a search bar and a "Popular" section with recent blog posts. At the bottom, there's a "Card #" field with the value "111999" and a "Check Balance" button. Below that, there's a "Gift Card Balance: \$50.00" section with a table showing recorded transactions.

Date Recorded	Recorded By	Amount	Description
2014-02-25	laserclinic	50.00	
2014-02-25	laserclinic	0	Account Activated.

# Online Enrollment & Registration

We have simple online enrollment links but also APIs that any web designer or developer can use to setup a nice form to capture the right data from the consumers enrolling.

Online Enrollment Example



**Get Amazing Freebies. Every Single Month!**

**YES! I Want Free Stuff!**

First Name

Last Name

Email

Mobile XXX-XXX-XXXX

Address 1

Address 2

City

Select State

Zip Code

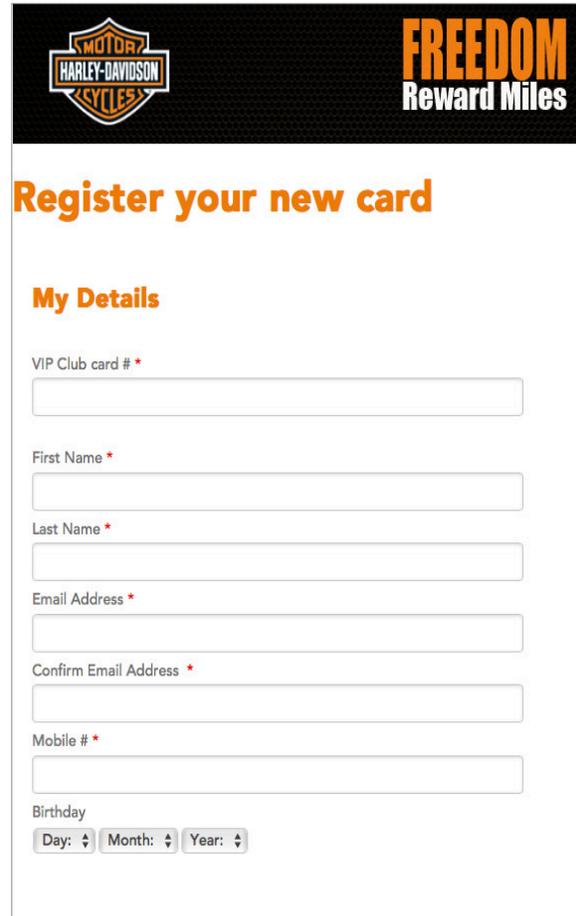
Birthday Month  Day  Year

Where did you hear about TeenFreeway?

Random Question: 2 + 2 =

Click on the "Like" button below for MORE FREEBIES!

Online Registration Example



**HARLEY-DAVIDSON MOTOR CYCLES** **FREEDOM Reward Miles**

## Register your new card

### My Details

VIP Club card # \*

First Name \*

Last Name \*

Email Address \*

Confirm Email Address \*

Mobile # \*

Birthday  
Day:  Month:  Year:

**Remember that during the online enrollment or registration process you are capturing valuable information from the consumers!**

What information can you capture? It's up to you and your clients, the technology allows you to create your own custom fields (Name, email, favorite drink, family members, etc. )



# Consumer - Open Source Web Portal

Allow your clients to offer a consumer portal to fully engage their customers. The mobile responsive consumer web portal will give you a huge head start. It's practically ready for you to upload a logo and host it anywhere you want.

### Administrator:

- Fully Customizable
- Host it Anywhere

### Customer:

- Balance Lookup
- Profile Editing
- Transaction History
- Reward Redemption
- Others Custom Configurations

Points Program	3851 points
Gift Card	\$30.00
Free Hotel Nights	2

Reward A (\$15)	150 points
Free Lunch	250 points
Free Night	1500 points
Disney Trip	50000 points

This is what a customized customer portal looks like!

# Reports

Do you love data as much as we do? Here is the list of reports available. Exporting any report or using APIs will provide you with more details.

## Marketing

- All Customers ✓
- New Customers ✓
- Frequent Customers ✓
- Missing Customers ✓
- Customers Celebrating their Birthday ✓
- Customer born between selected dates ✓
- Search Customers For Any (think custom fields) ✓

## Audit

- All Transactions ✓
- Redeemed Audit Liability ✓
- Totals ✓
- Store Totals Points (Coalition) ✓
- Store Totals Gift Card (Coalition) ✓

## Balance

- Customer Balances ✓

**Campaign Reports** Hide

**1 Select a Report**

**Audits:**

All Transactions

Redeemed Only

Totals

**2 Select a Date Range**

2017  To

2017  To

**3 Select Campaign(s)**

Earn Money Per Event

Points Program

[Select All](#) | [Deselect All](#)

**Marketing:**

All Customers

New Customers

Frequent Customers:

transactions or more.

Include Redeem Transactions.

Customers who had a transaction in the date range above, and haven't been back in this many days:

Include Redeem Transactions.

Customers who will celebrate a Birthday in the date range above

Customers whose Birth date is in the date range above

Search Customers For:

Include transactions

**Customer Balances Report:**

Customer Balances for  Earn Money Per Event

**Run Report**

**Frequent Customers Report**

Minimum Number of Transactions: 3    Date Range: 2017-07-01 to 2017-09-06    [Export for Excel](#)

Campaigns Included:  Earn Money Per Event    [Export to CSV](#)

Points Program    [Export to MailChimp](#)

[Export to SMS](#)

Page 1 of 1  
(Records 1 to 10 out of 10)

#	Name	Membership #	Phone Number	Email Address
1	Edgar Arana	111222	2024419862	arana.edgar@gmail.com
2	Henry Davidson	111333	2024419862	arana.edgar@gmail.com
3	Maria	156452875346710		
4	Maria Ramos	333	2024419862	
5	José Ruiz	202444		arana.edgar@gmail.com
6	Toto	606060		
7	Fabi	0907160706	2024419862	arana.edgar@gmail.com
8	Angel Marañón	92082250281380		arana.edgar@gmail.com
9		9207723456781237		
10		930808		

[Done](#)

