



StickyFeet **User Guide**

Client Tool Box

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StickyFeet Introduction

Worlds Largest

Established in 2001, IQ Gecko (a division of IQ Information Technology) was born as an IT Solutions company.

Taking our EFTPOS-to-POS technical expertise and enthusiasm, IQ Gecko worked with the Jotti group in both designing and selling a bespoke loyalty platform specifically for Gloria Jeans Coffees.

Driven by the company goal for continual improvements, IQ Gecko acquired the Australasian rights for the an international customer engagement platform known locally as StickyFeet.

Most people do not realise just how big the StickyFeet footprint has become as this same StickyFeet platform is unknown, but everywhere across the globe.

Our Platform Partners are around the globe and the same StickyFeet platform is used by Merchants in over 65 Countries and in Dozen of Languages making the StickyFeet platform the worlds largest Loyalty Platform.

The reason for the incredible take-up is that StickyFeet is an easy to use monthly subscription Internet platform that can grow for merchants, franchise groups and businesses of all shapes and sizes.

Just some of the local Australian and New Zealand StickyFeet platform clientele includes the likes of Suncorp Bank, Harley-Davidson Motorcycles, Toys"R"Us Australia, Health Information Pharmacy Group and Best Western Hotels Australasia.

The benefits of our platform are that you know exactly who your loyal customers are. You have their contact details - and they have requested that you keep them informed of your company's promotions, specials and new and exciting features.

An "engaged" customer with a loyalty card gives you more than six times the sales than a customer with only a loyalty card alone.

According to their 2009 Prospectus, loyalty card members made up only 3.4% of Myer sales, but when the growing amount loyalty card members were pro-actively engaged their percentage of Myer sales increased to 22.1% by Myer's loyalty members.

With IQ Gecko's StickyFeet platform your growing customer base of loyalty members are "engaged" via direct communication from the merchant.

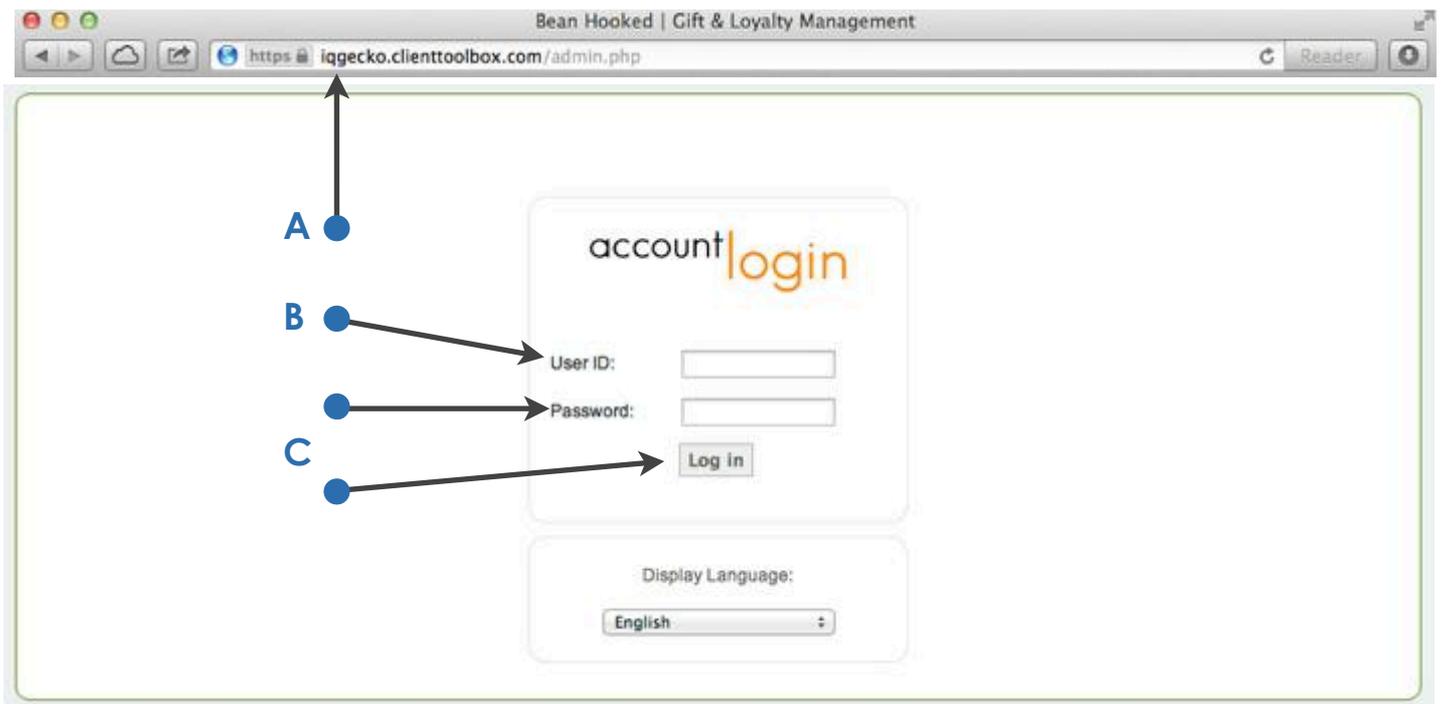
Communications such as automated emails after purchase which update the loyalty customer with their points status as well as a personal message.

This same StickyFeet platform means that the money-making features used by multinationals are available for any merchant @ a price that equates to less than a cup of coffee a day.

Getting Started

Logging In

- A** go to URL: <https://iqgecko.clienttoolbox.com>
- B** in the User ID box, enter in the User ID supplied to you
- C** in the Password box, enter in the Password supplied to you
- press the “Log In” button



Getting Started

Account Information

- A** on the front of the Admin page - click on "Edit"
- B** ensure your Account Information data is accurate
- C** ensure your Location and Time Zone is accurate
- D** add your MailChimp credentials
- E** save your changes

Bean Hooked Hello, Bean Hooked - Shop 1 Jump to: Account Control Panel Go

Account Information Edit

Business Name: **Bean Hooked** Account Owner: **Bean Hooked**
Address: **1234 West 5th Sydney, NSW 2000 Australia** Owner Contact: **iqit1@me.com +61280076440**

Bean Hooked Hello, Bean Hooked - Shop 1 Jump to: Account Control Panel Go

Account Information Save Changes or Cancel

Business Information

Business Name:
Address Line 1:
Address Line 2:
City:
State / Province:
Zip / Postal Code:
Country:

Account Owner

First Name:
Last Name:
Email Address:
Phone Number:

Owner Login

Owner ID: 80076440
API access Security Token: b1285d4b43914cc9980f5d3f54031e0f908e72
New Password: (optional)
Re-type new password:

Localization

Currency Symbol:
Timezone:
Note: This is the account's general timezone preference. An Account User can be set to another timezone (in the User section), which will override this preference.

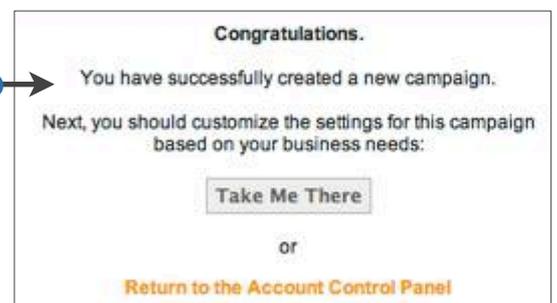
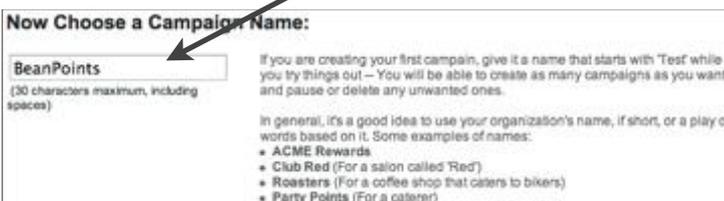
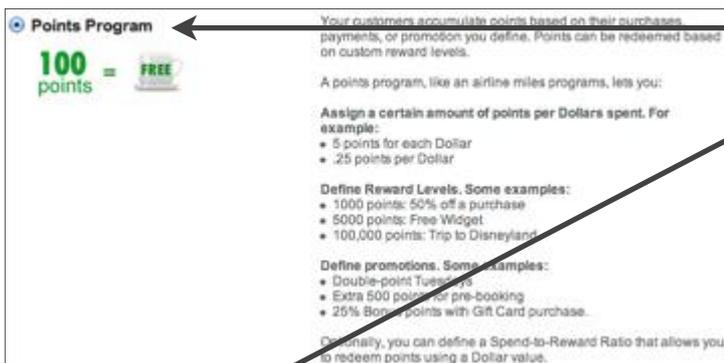
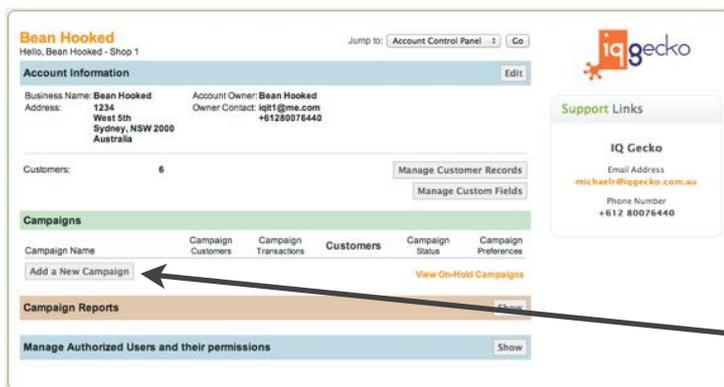
MailChimp Integration

MailChimp Username:
MailChimp Password:
MailChimp API Key:

Save Changes Cancel

Add a New Campaign Points Program

- A click onto Add New Campaign
 - B select your Campaign Type (Points Program)
 - C scroll to the bottom of the page and name your Campaign
 - D press the “Create Campaign” button
- start customising your loyalty program by clicking on the “Take Me There” button



Add a New Campaign

Points customisation

Ratio: Points-per-Dollar

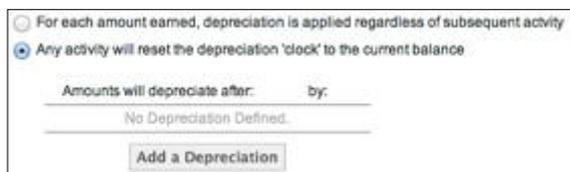


Points earned for every Dollar spent.

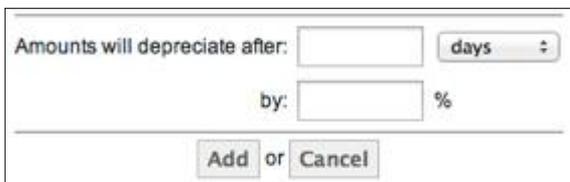
Choose your preferred Points-Per-Dollar ratio amounts and press "Set" to save.

Note: You can change this ratio can be at anytime - but customers' existing accumulated points will not change.

Depreciation



If you wish to depreciate points - you can choose to have points depreciated for all member - or just for members that are not "Active" or not.



If you choose to depreciate points - you can also choose the the amount to be depreciated after X-days and/or the % of points to be depreciated.

Note: IQ Gecko believes that Best Practice is to depreciate points from "In-Active" members (not back in 12 to 24 months) as Points are a Liability to Merchant.

Recurring Fee



Recurring Fees assists the Merchant in reducing Points Liability.

Recurring Fees are most commonly used by Franchise Head Offices to used to "support" (meaning fund) part or all of the marketing platform running costs.

Add a New Campaign

Points customisation (continued)

Reward Levels

Points	Description of reward earned when the amount of points specified is attained. Optional: Reward ID	
<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="button" value="Add"/> or <input type="button" value="Cancel"/>

Choose the amount of Points required to receive a specific product.

Note: If you set "100" points for a "Cup of Coffee" then if you are using the IQ Gecko "LoyaltyPad" portal when the customer receives a loyalty "Cup of Coffee" then "100" Points will automatically be deducted from the customer's points.

Promotions

Multiply or Add	By How Much	Promotion Description	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/> or <input type="button" value="Cancel"/>

Promotions modify the way points are earned.

You can have promotions add or subtract a specific amount of points, or multiply by a certain amount, when a transaction is recorded

Note:

"+" Promotions will be able to be recorded by themselves: just select the promotion and click on "Record".

"x" Promotions will not be able to be recorded by themselves: A purchase amount will be required.

Dollars to Redeem Points

Ability to enter Dollar amounts to redeem points:
Turned Off
Your Spend-to-Reward Ratio:
Not Set
Change to:
<input type="text"/> <input type="button" value="Set"/>

Ability to enter Dollar amounts to redeem points:
Turned On
Your Spend-to-Reward Ratio:
5
Change to:
<input type="text" value="5"/> <input type="button" value="Set"/>

You can turn on the ability to redeem points by entering a Dollar value.

The Spend-to-Reward Ratio is one of two ratios that you had to use to figure out the points value of your rewards.

So when you enter this Spend-to-Reward Ratio above, the program can automatically figure out how much those points are worth. There's no need for you or your cashiers to remember complicated rewards tables, or whip out a calculator.

Add a New Campaign

Points customisation (continued)

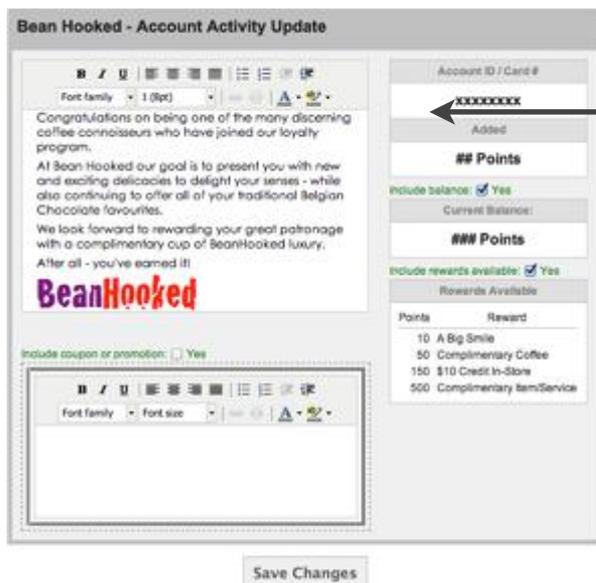
Transactional Email Nothing says “Thank-you” quite like, well, saying “Thank-you”. Nothing says “Thank-you” quite like, well, saying “Thank-you”.

Auto-emailing a thank-you greeting and points status after a purchase is very powerful because it reinforces the merchant’s relationship - while even featuring any product or promotion you may want to highlight.

By continuing past being “In-Shop” to now also being invited “In-Home” you are increasing your customer relationship and rapport.

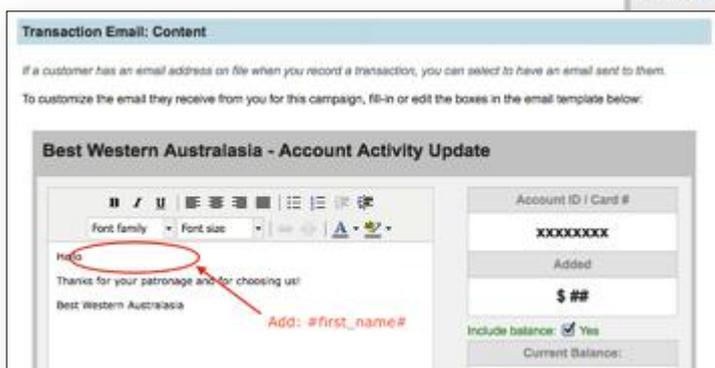
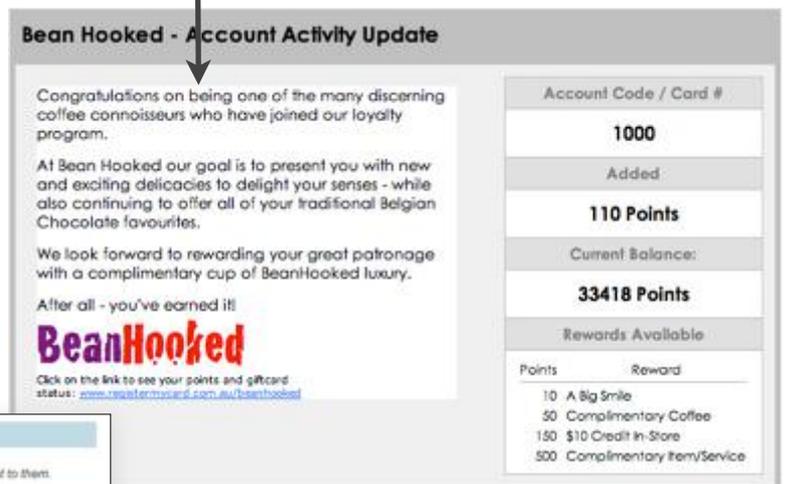
Note 1: We have found that the best way to ensure your preferred colour and font format is to design your text layout on another word-processing software (MS Word, Apple Pages, etc) and then simply copy and paste the text.

Note 2: This feature is available while doing loyalty purchase transactions within the Client Tool Box, LoyaltyPad and via the POS-interfaced SaleGrabber module.



● Sample of a designed Transactional Email message within the Client Tool Box.

● Sample of a email message as received by the loyalty member.

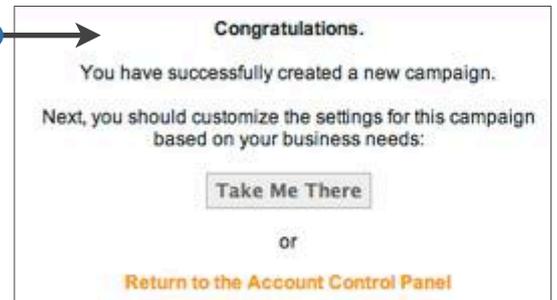
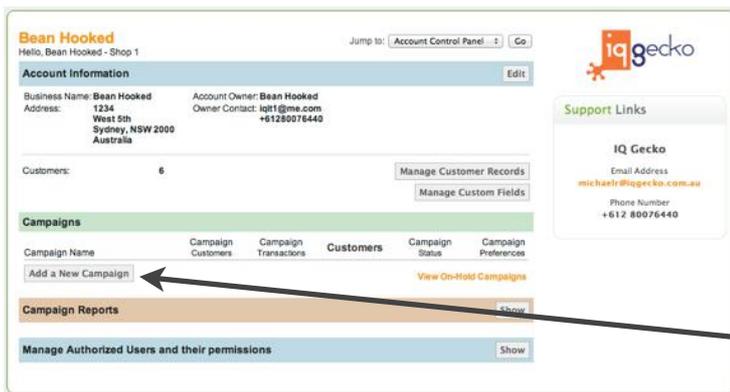


To add a “First Name” personalisation to your email simply add “#first_name#” to the content of your email.

Add a New Campaign

Buy X (get one free)

- A click onto Add New Campaign
 - B select your Campaign Type (Points Program)
 - C scroll to the bottom of the page and name your Campaign
 - D press the "Create Campaign" button
- start customising your loyalty program by clicking on the "Take Me There" button



Add a New Campaign

Buy X customisation

Buy X Get One Free Promotion

Edit a Product or Service

Service, Product, or Category	Optional: Reward ID	How Many Until Next Is Free	
Large Cuppa Coffee		10	Set or Cancel

Product, Service, or Category	# Until Next Is Free	
Large Cuppa Coffee:	10	Edit
Muffin and Coffee:	15	Edit

Add Another Service or Product

Add a Service or Product.

Click on “Add a Service or Product” and simply decide what to name your complimentary product along with the amount of previous X-purchases are required to receive the good(s).

Note 2: You can add multiple

Note 2: You can change this ratio can be at anytime.

Default number of services or products until the next one is free

~~Default for new services / products: 10~~
~~Change to: 10 Set~~

As you have set your own Service and Product Reward(s) above - this section is not required.

Add a New Campaign

Buy X customisation (continued)

Transactional Email Nothing says "Thank-you" quite like, well, saying "Thank-you".

Auto-emailing a thank-you greeting and points status after a purchase is very powerful because it reinforces the merchant's relationship - while even featuring any product or promotion you may want to highlight.

By continuing past being "In-Shop" to now also being invited "In-Home" you are increasing your customer relationship and rapport.

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Note 2: This feature is available while doing loyalty purchase transactions within the Client Tool Box, LoyaltyPad and via the POS-interfaced SaleGrabber module.

Bean Hooked - Account Activity Update

Account ID / Card #
XXXXXXXXXX

Added

Large Cuppa Coffee

Include balance: Yes

Current Balance:

Large Cuppa Coffee
Muffin and Coffee

Include rewards available: Yes

Rewards Available

# Unit	Product or Service
10	Large Cuppa Coffee
15	Muffin and Coffee

Sample of a designed Transactional Email message within the Client Tool Box.

Sample of a email message as received by the loyalty member.

Bean Hooked - Account Activity Update

Congratulations on being one of the many discerning coffee connoisseurs who have joined our loyalty program.

At Bean Hooked our goal is to present you with new and exciting delicacies to delight your senses - while also continuing to offer all of your traditional Belgian Chocolate favourites.

We look forward to rewarding your great patronage with a complimentary cup of BeanHooked luxury.

After all - you've earned it!

BeanHooked

Click on the link to see your points and giftcard status: www.rewardtermscard.com.au/beanhooked

Account Code / Card #
1000

Added

110 Points

Current Balance:
33418 Points

Rewards Available

Points	Reward
10	A Big Smile
50	Complimentary Coffee
150	\$10 Credit In-Store
500	Complimentary Item/Service

Add a New Campaign

Gift Card

- A** click onto Add New Campaign
 - B** select your Campaign Type (Gift Card Program)
 - C** scroll to the bottom of the page and name your Campaign
- press the “Create Campaign” button

The screenshot shows the IQ Gecko account dashboard for 'Bean Hooked'. The 'Account Information' section displays business details. The 'Campaigns' section has a table with columns for Campaign Name, Campaign Customers, Campaign Transactions, Customers, Campaign Status, and Campaign Preferences. An 'Add a New Campaign' button is highlighted with a blue dot and an arrow labeled 'A'. Below this, the 'Gift Card Program' is selected, also highlighted with a blue dot and an arrow labeled 'B'. The 'Now Choose a Campaign Name:' section shows 'BeanBucks' entered in a text box, with a blue dot and an arrow labeled 'C' pointing to it. At the bottom, a large orange 'Create Campaign' button is highlighted with a blue dot and an arrow labeled 'C'.

A

B

C

Create Campaign

Add a New Campaign

Gift Card customisation

The screenshot shows the 'Bean Hooked' account control panel. At the top, there's a navigation bar with 'Jump to: Account Control Panel' and a 'Go' button. Below that, the 'Account Information' section includes business name, address, and owner details. A 'Support Links' box on the right provides contact info for IQ Gecko. The main area features a 'Campaigns' table with columns for Campaign Name, Campaign Customers, Campaign Transactions, Customers, Campaign Status, and Campaign Preferences. The 'BeanBucks' campaign is listed with 0 customers and 0 transactions. An arrow points to the 'Edit' button in the 'Campaign Preferences' column for 'BeanBucks'.

Start customising your loyalty program by clicking on the "Edit" button

Depreciation

For each amount earned, depreciation is applied regardless of subsequent activity
 Any activity will reset the depreciation 'clock' to the current balance

Amounts will depreciate after: _____ by: _____
 No Depreciation Defined.

Amounts will depreciate after:

by: %

or

If you choose to depreciate Gift Card value you can also choose the the amount to be depreciated after X-days and/or the % of points to be depreciated.

Note: IQ Gecko believes that Best Practice is to depreciate or delete Gift Card funds after 12 to 24 months as Gift Card Funds are a Liability to Merchant.

Recurring Fee

Every

deduct Points

for the following reason:

or

Recurring Fees assists the Merchant in reducing Points Liability.

Recurring Fees are most commonly used by Franchise Head Offices to used to "support" (meaning fund) part or all of the marketing platform running costs.

Add a New Campaign

Gift Card customisation (continued)

Transactional Email Nothing says “Thank-you” quite like, well, saying “Thank-you”.

Auto-emailing a thank-you greeting and points status after a purchase is very powerful because it reinforces the merchant's relationship - while even featuring any product or promotion you may want to highlight.

By continuing past being “In-Shop” to now also being invited “In-Home” you are increasing your customer relationship and rapport.

Note 1: We have found that the best way to ensure your preferred colour and font format is to design your text layout on another word-processing software (MS Word, Apple Pages, etc) and then simply copy and paste the text.

Note 2: This feature is available while doing loyalty purchase transactions within the Client Tool Box, LoyaltyPad and via the POS-interfaced SaleGrabber module.

The screenshot shows the 'Bean Hooked - Account Activity Update' interface in the Client Tool Box. It features a rich text editor on the left with various formatting options (bold, italic, underline, font family, font size, background color, text color, link, unlink, list, indent, outdent, undo, redo). The main content area displays a sample email message with the following text:

Congratulations on being one of the many discerning coffee connoisseurs who have joined our loyalty program.

At Bean Hooked our goal is to present you with new and exciting delicacies to delight your senses - while also continuing to offer all of your traditional Belgian Chocolate favourites.

We look forward to rewarding your great patronage with a complimentary cup of BeanHooked luxury.

After all - you've earned it!

BeanHooked

Include coupon or promotion: Yes

Account ID / Card #
XXXXXXXXXX
Added
Large Cuppa Coffee

Include balance: Yes
Current Balance:
Large Cuppa Coffee
Muffin and Coffee

Include rewards available: Yes
Rewards Available

# Units	Product or Service
10	Large Cuppa Coffee
15	Muffin and Coffee

Sample of a designed Transactional Email message within the Client Tool Box.

The screenshot shows the final email message as received by the loyalty member. It features the same text as the design tool, but with specific account details and a rewards table:

Congratulations on being one of the many discerning coffee connoisseurs who have joined our loyalty program.

At Bean Hooked our goal is to present you with new and exciting delicacies to delight your senses - while also continuing to offer all of your traditional Belgian Chocolate favourites.

We look forward to rewarding your great patronage with a complimentary cup of BeanHooked luxury.

After all - you've earned it!

BeanHooked

Click on the link to see your points and giftcard status: www.newsterns.com.au/beanhooked

Account Code / Card #
1000
Added
110 Points
Current Balance:
33418 Points
Rewards Available

Points	Reward
10	A Big Smile
50	Complimentary Coffee
150	\$10 Credit In-Store
500	Complimentary Item/Service

Sample of a email message as received by the loyalty member.

Manage and Authorise Permissions and Users

- A** start by clicking on the “Show” button
- B** Click on “Add a New User”

Fill in the User information fields Note: Do not fill in the PIN field as it is not required

The screenshot shows the 'Bean Hooked' account control panel. At the top, there's a 'Jump to: Account Control Panel' dropdown and a 'Go' button. The 'Account Information' section includes business and owner details. Below that, there are sections for 'Campaigns' and 'Campaign Reports'. At the bottom, the 'Manage Authorized Users and their permissions' section has a 'Show' button highlighted with a blue dot and an arrow pointing to it, labeled 'A'.

Add a New User

The 'User Information' form contains the following fields:

- Choose a User ID to log-in with: (20 characters max)
- Choose a password for this user: (20 characters max)
- Please type the password again:
- First Name: (optional)
- Last Name: (optional)
- Addtl Info: (optional)
- Choose a PIN for this user: (Optional: For terminals, mainly.)

A blue dot and arrow labeled 'C' point to the top right corner of the form.

Manage and Authorise Permissions and Users (continued)

- D** Select your preferred language and time-zone
- E** Select the preferred User Role Note: 9 choices ranging from Admin to Observer
- F** Select which Campaigns this user is allowed to access Note: All Campaigns are displayed - even the ones that may currently be Deactivated
- G** Click on “Record New User”

The screenshot shows a user management form with three main sections: Localization, User Role, and Campaign Access. Callouts D, E, F, and G point to the Display Language, User Role, Campaign Access list, and the Record New User button, respectively.

Localization

Display Language: ← **D**

Timezone: ← **D**

User Role

Please select a role for this user: ← **E**

- Administrator:** Has access to everything.
- Manager:** 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.)
- Campaign Manager:** 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.)
- Associate Manager:** Can manage rewards and promotions within allowed campaigns, and manage all aspects of customer information and visits.
- Clerk:** Within allowed campaigns, can create & edit customers's info (but not change their card #, if assigned) and only record & redeem customer visits (but not delete any.)
- Temp** Within allowed campaigns, can only create new customers, and only record customer visits.
- Fulfilment Contractor** Within allowed campaigns, can only redeem customer rewards.
- Accountant** Can generate reports, view account billing info and campaign settings, but cannot view user and customer info.
- Observer** Can view user & customer info and certain campaign settings (rewards and promotions.)

Select which campaigns this user is allowed access to:

(Administrators automatically have access to all campaigns)

All

- 1 BeanPoints
- 15% off
- 2 BeanBucks
- BeanBucks
- BeanPoints
- easter
- ForArtSake
- Gift Card
- GiftCard
- Salon Points
- sampleloyalty
- Test Recast
- ThankYouCoffee
- None**

Record New User or **Cancel** ← **G**

← **F**

Add a Customer

Add a Customer to a Campaign

- A start by clicking on the "Add" button
- B type in the Card Number and Customer details
- C you may also Add the Customer to any/all other Campaigns
- D click on "Create Customer Account"

The image shows two screenshots from a web application. The top screenshot is a table titled 'Campaigns' with columns for Campaign Name, Campaign Customers, Campaign Transactions, Customers, Campaign Status, and Campaign Preferences. The 'Customers' column contains 'Add', 'Lookup', 'Deactivate', and 'Edit' buttons. An arrow labeled 'A' points to the 'Add' button for the '1 BeanPoints' campaign.

The bottom screenshot is a form titled 'Create a New Customer Account' with a 'Cancel' button. It contains several input fields: Card # (optional), First Name, Last Name, Phone Number, Email Address, Birthday (Month, Day, Year), Address (Street, City, State / Province, Zip / Postal Code), Country, Addtl Info, and Family Cards. There are also checkboxes for 'Other campaigns to add customer to:' with options for '2 BeanBucks' and 'ThankYouCoffee'. A 'Generate Random Number' button is next to the Card # field. An arrow labeled 'B' points to the Card # field, 'C' points to the 'Add' button in the 'Other campaigns to add customer to:' section, and 'D' points to the 'Create Customer Account' button at the bottom.

Campaign Name	Campaign Customers	Campaign Transactions	Customers	Campaign Status	Campaign Preferences
1 BeanPoints	5	120	Add	Lookup	Deactivate Edit
2 BeanBucks	2	21	Add	Lookup	Deactivate Edit

Create a New Customer Account [Cancel]

Card # (optional): or

A unique Card # or Customer Account ID is necessary for them to be able to check their balances on your site.

First Name:

Last Name:

Phone Number:

Email Address:

Birthday: / /
Month Day Year

Address::

City State / Province Zip / Postal Code

Country:

Addtl Info:

Family Cards:

Other campaigns to add customer to: 2 BeanBucks ThankYouCoffee

Lookup a Customer

Lookup & transact a Customer



- A** start by clicking on the "Lookup" button
- B** type or scan in the Card Number and press "Find"
- C** add or deduct the applicable amount
- D** click on the appropriate "Record Points" or "Deduct" button

Campaigns						
Campaign Name	Campaign Customers	Campaign Transactions	Customers		Campaign Status	Campaign Preferences
1 BeanPoints	5	120	Add	Lookup	Deactivate	Edit
2 BeanBucks	2	21	Add	Lookup	Deactivate	Edit

Bean Hooked
Hello, Bean Hooked

Jump to: 1 BeanPoints | Go

1 BeanPoints

Lookup a Customer | Add a Customer

Find a Customer's Account

Enter any part of a customer's information:

1000 | Find

Support Links

IQ Gecko
Email Address: info@iqgecko.com.au
Phone Number: +612 88076440

Customer Account

Current Balance: **5 Points**

Print Summary

Card #: 1000

Name: Chuck Sample
Phone Number: (02) 80076440
Email Address: iclt1@me.com
Address: 16, 275 New Line Road
Mural, NSW 2158
Australia
Family Cards: 1001, 1002

New Activity

Enter Purchases Total: \$

Select a Promotion: None

Description:

amount spent:

Send Email? Yes

Record Points

Rewards Available

Deduct Points or Dollars:

Points \$ (Available: \$0.33)

Or select a reward to redeem:

Points	Description of Reward
10	A Big Smile
50	Complimentary Coffee
150	\$10 Credit In-Store
500	Complimentary Item/Service

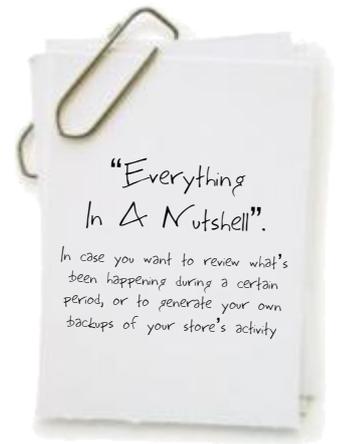
The current balance on this account is not enough to claim a pre-defined reward.

Description (optional):

Deduct

Reporting

Transactions Audit



- A** start by clicking on the “Show” button
- B** select “All Transactions” along with your preferred Date Range and Campaigns
- click on “Run Report” to view data
- C** “Export to Excel” to extrapolate the Report data

The screenshot shows the 'Campaign Reports' interface. At the top right, there is a 'Show' button. Below it, the report configuration is divided into three sections: '1 Select a Report', '2 Select a Date Range', and '3 Select Campaign(s)'. In section 1, 'All Transactions' is selected. In section 2, the date range is set to 2013 Jan 1 to 2013 Feb 27. In section 3, 'BeanBucks' and 'BeanPoints' are selected. Below these sections are various marketing and customer balance filters. At the bottom left, there is a 'Run Report' button. At the bottom right, there is an 'Export to Excel' button. Below the configuration, a sample of the report data is shown, including a table with columns: Date, User / Employee, Transaction, Campaign, Card #, and Name. The table contains 20 rows of transaction data. Below the table, there is a 'Done' button.

Annotations with blue circles and arrows indicate the steps: A points to the 'Show' button, B points to the 'All Transactions' radio button, C points to the 'Export to Excel' button, and D points to the 'Run Report' button. A blue circle with an arrow points to the sample report data.

Reporting

Redeemed Audit



- A** start by clicking on the “Show” button
- B** select “Redeemed Only” along with your preferred Date Range and Campaigns
- click on “Run Report” to view data
- C** “Export to Excel” to export data

The screenshot shows the 'Campaign Reports' interface. At the top right, there is a 'Show' button (labeled A). Below it, there are three sections: '1 Select a Report', '2 Select a Date Range', and '3 Select Campaign(s)'. Under '1 Select a Report', there are radio buttons for 'All Transactions', 'Redeemed Only' (selected), and 'Totals'. Under '2 Select a Date Range', there are date pickers for 'From' (2013 Jan 1) and 'To' (2013 Apr 26). Under '3 Select Campaign(s)', there are checkboxes for '1 BeanPoints' and '2 BeanPoints', and a 'Select All | Deselect All' link. Below these are 'Marketing:' and 'Customer Balances Report:' sections with various options. At the bottom center, there is a 'Run Report' button (labeled C). Below the 'Run Report' button, there is a 'Transaction Audit Report' page. At the top right of this page, there is a 'Jump to: Account Control Panel Go' link. Below that, there is a 'Date Range: 2013-03-01 to 2013-03-18' and 'Campaigns Included: 1 BeanPoints'. At the bottom right of the report header, there is an 'Export to Excel' button (labeled D). Below the header, there is a table with 6 columns: Date, User / Employee, Transaction, Campaign, Card #, and Name. The table contains 6 rows of data. At the bottom of the table, there is a 'Done' button.

Reporting

Liability / Totals Audit



- A** start by clicking on the “Show” button
- B** select “Totals” along with your preferred Date Range and Campaigns
- click on “Run Report” to view data
- C** “Export to Excel” to export data

The screenshot shows the 'Campaign Reports' interface. At the top right is a 'Show' button (labeled A). Below it are three sections: '1 Select a Report' with radio buttons for 'All Transactions', 'Redeemed Only', and 'Totals' (selected); '2 Select a Date Range' with dropdowns for year (2012 to 2013) and month (Jan to Mar); and '3 Select Campaign(s)' with checkboxes for '1 BeanPoints' and '2 BeanBucks'. Below these are 'Marketing' and 'Customer Balances Report' sections. A 'Run Report' button is at the bottom. The resulting 'Totals Audit Report' shows a table with columns 'Earned', 'Redeemed', and 'Liability' for '1 BeanPoints' and '2 BeanBucks'. An 'Export to Excel' button is visible in the report header.

	Earned	Redeemed	Liability
1 BeanPoints	424,238	-388,007	38,231 Points (\$ 8,615.46)
2 BeanBucks	\$ 5,831.00	\$ -5,881.00	\$ 50.00

Reporting

All Customers



A start by clicking on the "Show" button

B select "All Customers" along with your preferred Date Range and Campaigns

click on "Run Report" to view data

C "Export to Excel" to export data

The screenshot shows the 'Campaign Reports' interface. At the top right, there is a 'Show' button. Below it, there are three columns: '1 Select a Report', '2 Select a Date Range', and '3 Select Campaign(s)'. Under 'Audits', there are radio buttons for 'All Transactions', 'Redeemed Only', and 'Totals'. Under 'Marketing', there are radio buttons for 'All Customers', 'New Customers', and 'Frequent Customers'. There are also checkboxes for 'Include Redeem Transactions' and 'Customers who had a transaction in the date range above, and haven't been back in this many days above'. At the bottom, there is a 'Run Report' button. Below the 'Run Report' button, there is a 'Bean Hooked' report titled 'All Customers Report'. The report shows 'All Customers Between: 2013-01-01 and 2013-04-26' and 'Campaigns Included: 1 BeanPoints, 2 BeanBucks'. At the bottom of the report, there is a table with columns: Name, Card #, Phone Number, Email Address, and Addtl Info. The table contains 9 rows of customer data. To the right of the report, there are three buttons: 'Export to Excel', 'Export to Mailchimp', and 'Export to SMS'. The 'Export to SMS' button is crossed out with a red line. An orange circle highlights the 'Export to Excel' button, and an orange arrow points from it to a larger orange circle containing the 'Export to Excel', 'Export to Mailchimp', and 'Export to SMS' buttons.

Note: The "Export to SMS" feature is not currently available in Australia / New Zealand.

To send an SMS message, simply Export your selected clients to Excel and upload these contact names and mobile numbers to your preferred Australian / New Zealand SMS supplier.

Reporting

New Customers



- A** start by clicking on the "Show" button
- B** select "New Customers" along with your preferred Date Range and Campaigns
- click on "Run Report" to view data
- C** "Export to Excel" to export data

Campaign Reports Show

1 Select a Report **2 Select a Date Range** **3 Select Campaign(s)**

Audits:

- All Transactions
- Redeemed Only
- Totals

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:

Customer Balances Report:

- Customer Balances for

Run Report

Bean Hooked
Hello, Bean Hooked

New Customers Report

New Customers Between: 2013-01-01 and 2013-04-26
Campaigns Included: 1 BeanPoints, 2 BeanBucks

Page 1 of 1
(Records 1 to 5 out of 5)

Name	Card #	Phone Number	Email Address	Add'l Info
Bill Sample	98761	0414 915 458	lg1t@me.com	
Brad McKay	24801	+61 450 254 424	brad.mckay@bonmedia.com.au	One awesome Dude
First name Last Name	Card#	Mobile	Email	
First name Last Name	Card #	Mobile	Email	
Mike Allison	1308	0402 521 231	mike.allison@yahoo.com.au	

Export to Excel
Export to Mailchimp
~~Export to SMS~~

Note: The "Export to SMS" feature is not currently available in Australia / New Zealand.

To send an SMS message, simply Export your selected clients to Excel and upload these contact names and mobile numbers to your preferred Australian / New Zealand SMS supplier.

Reporting

Frequent Customers



- A** start by clicking on the "Show" button
- B** select "Frequency Customers", the frequency number along with your preferred Date Range and Campaigns
- click on "Run Report" to view data
- C** "Export to Excel" to export data

#	Name	Card #	Phone Number	Email Address	Addtl Info
10	Chuck Sample	1500	0280076440	iq11@me.com	
6	Brad McKay	24601	+61 450 254 426	brad.mckay@oommedia.com.au	One awesome Dude
6	Pranav Raja	12345		pranav.h.raja@gmail.com	
6	Mike Aleop	1368	0452 521 231	mike.aleop@yahoo.com.au	

Note: The "Export to SMS" feature is not currently available in Australia / New Zealand.

To send an SMS message, simply Export your selected clients to Excel and upload these contact names and mobile numbers to your preferred Australian / New Zealand SMS supplier.

Reporting

Missing Customer

Here's a list of your loyalty customers who have **NOT** shopped within your specified Frequency.

All the customers that haven't had any new transactions in the date range and campaigns selected, for at least the number of days specified

- A** start by clicking on the "Show" button
- B** select "Customers who have not been back", the frequency number along with your preferred Date Range and Campaigns
- click on "Run Report" to view data
- C** "Export to Excel" to export data

Run Report

Bean Hooked
Hello, Bean Hooked

Jump to: Account Control Panel Go

Customers Who Haven't Returned in 14 Days

Customers had a transaction between: 2013-01-01 and 2013-04-26
Campaigns Included: 1 BeanPoints, 2 BeanBucks

Page 1 of 1
(Records 1 to 6 out of 6)

Name	Card #	Phone Number	Email Address	Addtl Info
Bill Sample	98761	0414 915 456	iq11@me.com	
First name Last Name	Card#	Mobile	Email	
Henry Dimple	98764	(03) 9878 1234	iq11@me.com	
Pranav Raja	12345		pranav.h.raja@gmail.com	
Sam Sample	98762	(02) 8507 6440	iq11@me.com	

Done

Note: The "Export to SMS" feature is not currently available in Australia / New Zealand.

To send an SMS message, simply Export your selected clients to Excel and upload these contact names and mobile numbers to your preferred Australian / New Zealand SMS supplier.

Reporting

Birthday Customers



- A** start by clicking on the "Show" button
- B** select your preferred Date Range and the "Birthday in the date range above" Campaigns
- click on "Run Report" to view data
- C** "Export to Excel" to export data

Campaign Reports [Show]

1 Select a Report **2** Select a Date Range **3** Select Campaign(s)

Audits:

- All Transactions
- Redeemed Only
- Totals

2013 : Jan : 1 : to 2013 : Apr : 26 :

- 1 BeanPoints
- 2 BeanBucks

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:

Customer Balances Report:

- Customer Balances for

Run Report

Bean Hooked Hello, Bean Hooked

Jump to: Account Control Panel : Go

Customers Birthday Report

Date Range: 2013-01-01 to 2013-04-26
 Campaigns Included: 1 BeanPoints, 2 BeanBucks

Page 1 of 1 (Records 1 to 2 out of 2)

Date	Name	Card #	Phone Number	Email Address	Addtl Info
1995-01-01	test test	9188527547171964	000000000	test@test.com	
1973-03-08	Chuck Sample	1000	0280078440	iq11@me.com	

Export to Excel
 Export to Mailchimp
~~Export to SMS~~

Note: The "Export to SMS" feature is not currently available in Australia / New Zealand.

To send an SMS message, simply Export your selected clients to Excel and upload these contact names and mobile numbers to your preferred Australian / New Zealand SMS supplier.

Reporting

Search Customers



- A** start by clicking on the "Show" button
- B** select your preferred Date Range and the "Search Customers" along with the Keyword (ie: Harley-Davidson) you wish to search for.
- click on "Run Report" to view data
- C** "Export to Excel" to export data

Note: The "Export to SMS" feature is not currently available in Australia / New Zealand.

To send an SMS message, simply Export your selected clients to Excel and upload these contact names and mobile numbers to your preferred Australian / New Zealand SMS supplier.

Reporting

Customer Balances

A list of all the customers that have any recorded balance and what their earned, redeemed, and current balances are.
Can also be used as another version of a Liability Report

- A** start by clicking on the "Show" button
- B** select your preferred Date Range and "Customer Balances" along with your preferred campaign.
- click on "Run Report" to view data
- C** "Export to Excel" to export data

Campaign Reports Show

1 Select a Report 2 Select a Date Range 3 Select Campaign(s)

Audits:

- All Transactions
- Redeemed Only
- Totals

2013 : Jan : 1 :
to
2013 : Apr : 27 :

1 BeanPoints
 2 BeanBucks
[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:

Customer Balances Report:

- Customer Balances for

Run Report

Bean Hooked Jump to: Go

Hello, Bean Hooked.

Customer Balances Report

Customer Balances for: Export to Excel

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

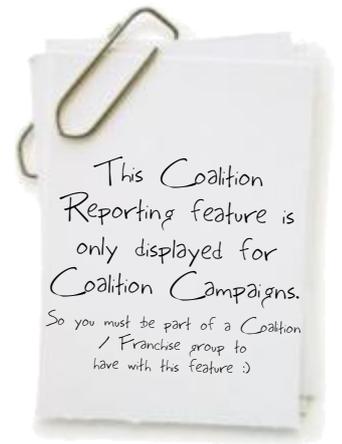
Name	Card #	Email Address	Earned	Redeemed	Balance
Chuck Sample	1000	iq11@me.com	423,845 (\$14,131.00)	-423,292 (\$-14,150.00)	655 (\$21.00)
Brad McKay	24601	brad_mckay@hommedia.com.au	53,060 (\$1,768.00)	-90,800 (\$-3,026.00)	22,250 (\$741.00)
Prenav Raja	12345	prenav.h.raja@gmail.com	3,510 (\$117.00)	-1,010 (\$-33.00)	2,500 (\$83.00)
Sam Simps	98762	iq11@me.com	950 (\$31.00)	0 (\$0.00)	950 (\$31.00)
test test	0188527647171984	test@test.com	125 (\$4.00)	0 (\$0.00)	125 (\$4.00)
Mike Allap	1368	mike.allap@yahoo.com.au	50 (\$1.00)	0 (\$0.00)	50 (\$1.00)
Henry Dimple	98764	iq11@me.com	20 (\$0.00)	0 (\$0.00)	20 (\$0.00)
Bill Sample	98791	iq11@me.com	5 (\$0.00)	0 (\$0.00)	5 (\$0.00)
First name	Card#	Email	0 (\$0.00)	0 (\$0.00)	0 (\$0.00)
Last Name	Card #	Email	0 (\$0.00)	0 (\$0.00)	0 (\$0.00)

Done

You can use this report to send out a mailing to your top customers - either with the highest current balances, or the ones that have spent the most.

Reporting

Coalition Points / Liability Audit



- A** start by clicking on the "Show" button
- B** select Customer Balances along with your preferred Date Range and Campaigns
- C** click/highlight "Store Totals - Points"
- D** click on "Run Report" to view data

Campaign Reports Show

Campaign Reports Hide

1 Select a Report **2 Select a Date Range** **3 Select Campaign(s)**

Audits:

- All Transactions
- Redeemed Only
- Totals

Coalition Reports:

- Store Totals - Points
- Store Totals - Giftcards

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:

Customer Balances Report:

- Customer Balances for

FreedomRewardMiles (checked)

- FreedomRewardMiles
- FreedomRewardMiles_1000S4
- FreedomRewardMiles_ANZAMC6676
- FreedomRewardMiles_AuckMC6667
- FreedomRewardMiles_M&VMC6693
- FreedomRewardMiles_R&SMC6681
- FreedomRewardMiles_RTMC6668
- FreedomRewardMiles_WellMC6677

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

Run Report

Reporting

Coalition Points / Liability Audit



- E** displays points earned by the loyalty customer (Merchant liability) across the total campaign as well as the individual locations
- F** displays points redeemed by the loyalty customer (Merchant asset)
- click on "Export to Excel" to view data in a spreadsheet
- G** click on "Done" to go back to the ClientToolBox home page

Harley-Davidson
Hello, Harley Davidson

Jump to: Account Control Panel : Go

Totals Audit Report

Date Range: 2013-01-01 to 2013-04-21
Campaigns Included:
FreedomRewardMiles
FreedomRewardMiles_1000S4
FreedomRewardMiles_ANZAMC6676
FreedomRewardMiles_AuckMC6667
FreedomRewardMiles_M&VMC6693
FreedomRewardMiles_R&SMC6681
FreedomRewardMiles_RTMC6668
FreedomRewardMiles_WellMC6677

Export to Excel

	Earned	Redeemed	Balance
FreedomRewardMiles	2,750	0	2,750 Points (\$ 137.50)
FreedomRewardMiles_1000S4	838	-650	188 Points (\$ 9.40)
FreedomRewardMiles_ANZAMC6676	52,784	45,070	97,854 Points (\$ 4,892.70)
FreedomRewardMiles_AuckMC6667	343,450	262,677	80,773 Points (\$ 4,036.35)
FreedomRewardMiles_M&VMC6693	34,458	-16,299	18,159 Points (\$ 907.95)
FreedomRewardMiles_R&SMC6681	225,211	171,046	396,259 Points (\$ 19,812.95)
FreedomRewardMiles_RTMC6668	121,085	83,779	184,864 Points (\$ 9,243.20)
FreedomRewardMiles_WellMC6677	68,370	36,561	104,931 Points (\$ 5,246.55)

Done

iqgecko

Support Links

IQ Gecko
Email Address: michaelr@iqgecko.com.au
Phone Number: +612 80076440

Reporting

Exporting to MailChimp



- A** on the front of the Admin page - click on "Edit"
- B** place your MailChimp credentials are placed in the MailChimp Integration section in your Account Information area
- C** click on "Save Changes"

Bean Hooked Jump to: [Account Control Panel](#)

Hello, Bean Hooked - Shop 1

Account Information

Business Name: Bean Hooked	Account Owner: Bean Hooked
Address: 1234 West 5th Sydney, NSW 2000 Australia	Owner Contact: iqit1@me.com +61280076440

Account Owner

First Name:

Last Name:

Email Address:

Phone Number:

Owner Login

Owner ID: binrewards

API access Security Token: a1eff8f83156d3c877486bf0b48cd52d3d8f827b

New Password: (optional)

Re-type new password:

Localization

Currency Symbol:

Timezone:

Note: This is the account's general timezone preference. An Account User can be set to another timezone (in the User section), which will override this preference.

MailChimp Integration

MailChimp Username:

MailChimp Password:

MailChimp API Key:

get MailChimp credentials from mailchimp.com

Reporting

Export to MailChimp (continued)



- D** start by clicking on the “Show” button
- E** simply “Check” your preferred Marketing Report
- F** click the “Run Report” button



1 Select a Report	2 Select a Date Range	3 Select Campaign(s)
Audits: <input type="radio"/> All Transactions <input type="radio"/> Redeemed Only <input type="radio"/> Totals	2012 : Jan : 1 : to 2013 : Feb : 27 :	<input checked="" type="checkbox"/> 1 BeanPoints <input checked="" type="checkbox"/> 2 BeanBucks Select All Deselect All
Marketing: <input checked="" type="radio"/> All Customers <input type="radio"/> New Customers <input type="radio"/> Frequent Customers: <input type="text"/> transactions or more. <input type="checkbox"/> Include Redeem Transactions. <input type="radio"/> Customers who had a transaction in the date range above, and haven't been back in this many days: <input type="text"/> <input type="checkbox"/> Include Redeem Transactions.. <input type="radio"/> Customers who will celebrate a Birthday in the date range above <input type="radio"/> Customers whose Birth date is in the date range above <input type="radio"/> Search Customers For: <input type="text"/>		
Customer Balances Report: <input type="radio"/> Customer Balances for 1 BeanPoints :		



Reporting

Export to MailChimp (continued)

- G** click on "Export to MailChimp"
- H** select your preferred MailChimp List to Export to
- I** once your Exported is Complete you can run your MailChimp

All Customers Between: 2010-01-01 and 2013-02-01
 Campaigns Included: BLN Rewards

Run any "Marketing" Report →

Export to Excel
 Export to MailChimp
 Export to SMS

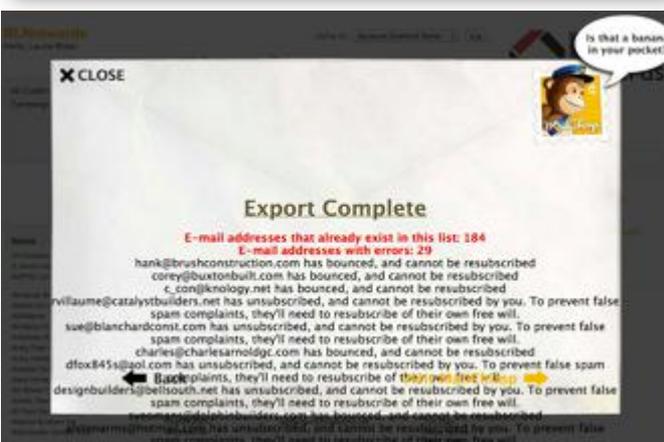
Page 1 of 9
 (Records 1 to 25 out of 222)

Name	Account #	Phone Number	Email Address	Contact Name
4H Construction	8438325334		mgherize@aol.com	John Heape
A Jones Carolina Co. LLC	8438848700	8438848700	JIMV.JONES@gmail.com	
AARCO John Iverson	7043091568	7041842680	jiverson@aapogroup.com	Building the Peninsula
Advance Builders	8435739090		michael@advance-builders.com	John Ahern
Aldrich Inc of Charleston	8437683299		aldrich@bellsouth.net	Frederick Aldrich
AWilliams	8438170319	8438170319	awilliams@hotmail.com	
AI About Garage Doors	8438324304		alaboutgaragedoors@yahoo.com	Robert Gutch
American Woodcraft	8437952738		blair304@aol.com	Tom Fath
Andy Free Construction Inc	8432796308		andyfree@bellsouth.net	Andy Free
Andy Melinos	8435148529		amelmelinos@gmail.com	
Arcadia Construction	8438304201		Peter.melinos@gmail.com	Peter Melinos
Area Home Builders	8432252747		ameshomeroids@knology.net	Toed King
At Brown Construction and Management	8437620754			
Artistic Design & Construction, Inc.	Artistic1	8435732444	alicia@artisticdesignandconstruction.com	Alicia Knard
At Your Service	8435321842		tmrvc.fc@gmail.com	Tim Rodgers
Atlantic Builders Inc	8435543990		ton@atlanticbuildersinc.net	Tom Shaw
Atlanta Homes, LLC	8438490199			Steve Daniels/ Keith Haris
B&B Custom Builders, LLC	8434789316		cbarton@comcast.net	Chad Barton
B. C. Williams Construction	baryow		barywilliams458@yahoo.com	Bary Williams

← ● **G**



← ● **H**



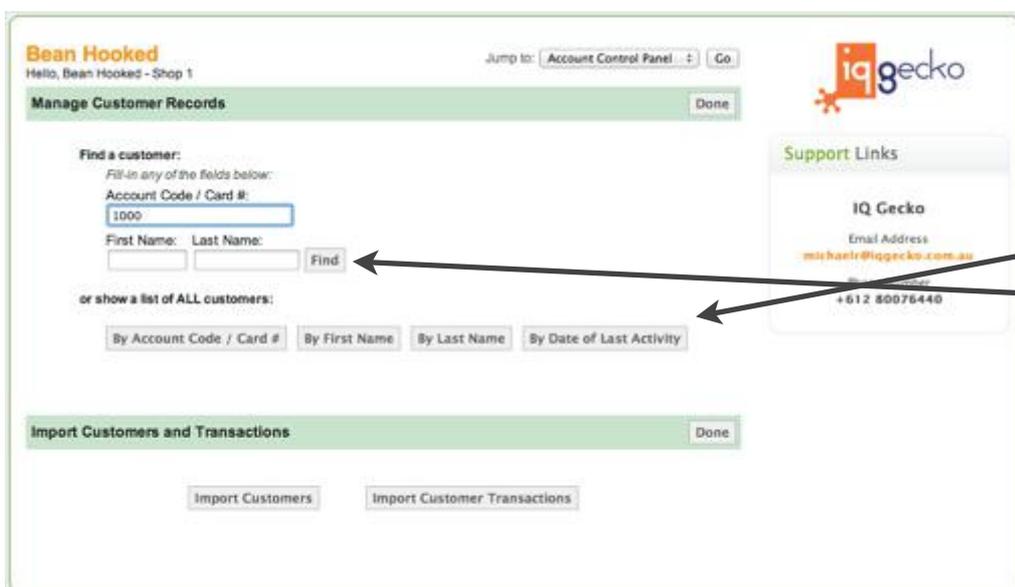
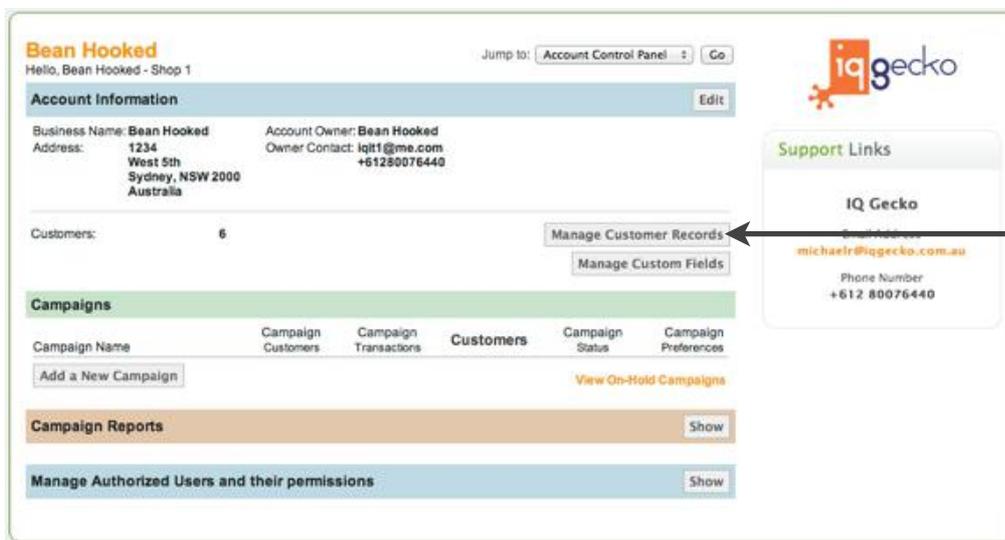
← ● **I**

Manage Records & Fields

Customer Records

- A** click on “Manage Customer Records”
- B** there is a selection of easy customer look-up types including customer name, card number and more.

If you wish to view All Customers simply click on the “Find” button while have **no data** in the lookup fields.



Manage Records & Fields

Customer Records (continued)

- D** click on your chosen "Customer Record"
- E** easily Edit the Customer's Account Information, add them to other Campaigns and Review Customer Activity

Bean Hooked
Hello, Bean Hooked - Shop 1

Jump to: **Account Control Panel** | **Go**

Customer Account List Done

Name	Account Code or Card #	Campaign (Activity)	Last Activity
Chuck Sample	1000	1 BeanPoints (101) 2 BeanBucks (19) ForArtSake (5) Salon Points (1) Test Recast (1)	2013-02-13

Support Links

IQ Gecko
Email Address: michaelr@iqgecko.com.au
Phone Number: +612 80076440

Bean Hooked
Hello, Bean Hooked - Shop 1

Jump to: **Account Control Panel** | **Go**

Edit Account Information

All fields are optional

Card #: 1000 Generate Random Number

First Name: Chuck
Last Name: Sample
Username: []
Phone Number: 0280076440
Email Address: iqt1@me.com
Birthday: []
Address: 16, 276 New Line Road
Dural NSW 2158
City: [] State / Province: [] Zip / Postal Code: []
Country: Australia
Add Info: []
Family Cards: 1001, 1002

Add Customer to other Campaigns:

- On Hold: 15% off
- On Hold: BeanBucks
- On Hold: BeanPoints
- On Hold: easter
- On Hold: Gift Card
- On Hold: GiftCard
- On Hold: sampleloyalty
- On Hold: ThankYouCoffee

Customer Account Information Activity

Date	Recorded By	Description
2012-09-16	API_API	Address changed to: 16, 276 New Line Road Address changed to: Dural Address changed to: NSW Address changed to: 2158 Address changed to: Australia
2012-09-07	shopone	Phone # change from 02 80076440 to 0280076440
2012-05-29	80076440	Email change from iqt1@me.com.au to iqt1@me.com
2012-05-29	80076440	Email change from iqt@me.com.au to iqt1@me.com.au
2012-05-24	80076440	Add1 info changed to: 1001, 1002
2012-04-20	80076440	Card # 1210 has been replaced by: 1000 Password changed Phone # change to 02 80076440 Email change to iqt@me.com.au
2012-04-20	80076440	Password changed
2012-04-13	80076440	Name change from Chuck Yikes to Chuck Sample Password changed
2012-04-12	API_API	Name change from Mr Yikes to Chuck Yikes
2012-04-12	API_API	Name change to Mr Yikes Password changed Birthday change from 0000-00-00 to none.
2012-04-10	80076440	Account Activated

Manage Records & Fields

Custom Fields



- A click on "Manage Custom Fields"
- B click on your preferred field type.

Bean Hooked
Hello, Bean Hooked - Shop 1

Jump to: Account Control Panel Go

Account Information Edit

Business Name: **Bean Hooked** Account Owner: **Bean Hooked**
Address: 1234 West 5th Sydney, NSW 2000 Australia Owner Contact: **iq11@me.com** +61280076440

Customers: 6

Manage Customer Records
Manage Custom Fields

Campaigns

Campaign Name	Campaign Customers	Campaign Transactions	Customers	Campaign Status	Campaign Preferences
Add a New Campaign					

View On-Hold Campaigns

Campaign Reports Show

Manage Authorized Users and their permissions Show

Support Links

IQ Gecko
Email Address: **michaelr@iqgecko.com.au**
Phone Number: **+612 80076440**

A

Bean Hooked
Hello, Bean Hooked - Shop 1

Jump to: Account Control Panel Go

Select Data Fields to Manage Done

Customer Fields **Transaction Fields**

Support Links

IQ Gecko
Email Address: **michaelr@iqgecko.com.au**
Phone Number: **+612 80076440**

B

Manage Records & Fields

Custom Fields (continued)

- C Customer Fields
- D Transaction Fields

Bean Hooked
Hello, Bean Hooked - Shop 1

Jump to:

Manage Customer Data Fields

Predefined Customer Fields:

Show	Label	Show	Label	Show	Label
<input checked="" type="checkbox"/>	Card #	<input checked="" type="checkbox"/>	Address Line 1	<input checked="" type="checkbox"/>	Username
<input checked="" type="checkbox"/>	First Name	<input checked="" type="checkbox"/>	Address Line 2	<input type="checkbox"/>	Password
<input checked="" type="checkbox"/>	Last Name	<input checked="" type="checkbox"/>	City	<input type="checkbox"/>	PIN
<input checked="" type="checkbox"/>	Phone Number	<input checked="" type="checkbox"/>	State / Province		
<input checked="" type="checkbox"/>	Email Address	<input checked="" type="checkbox"/>	Zip / Postal Code		
<input checked="" type="checkbox"/>	Birthday	<input checked="" type="checkbox"/>	Country		

Custom Fields:

Show	Is ID	Label	Type	List Options (Separate each option with a comma)	Unique
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Addtl Info	Text		No
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Family Cards	Text		Yes

Support Links

IQ Gecko
Email Address
michaelr@iqgecko.com.au
Phone Number
+612 80076440



Bean Hooked
Hello, Bean Hooked - Shop 1

Jump to:

Manage Transaction Data Fields

Custom Fields:

Show	Label	Type	List Options (Separate each option with a comma)	Unique
<input checked="" type="checkbox"/>	amount spent	Money		

Support Links

IQ Gecko
Email Address
michaelr@iqgecko.com.au
Phone Number
+612 80076440



Import Customers

- A click on "Manage Customer Records"
- B click on "Import Customers"

The screenshot shows the 'Bean Hooked' account dashboard. At the top, there is a 'Jump to: Account Control Panel' dropdown and a 'Go' button. The 'Account Information' section includes business details and an 'Edit' button. A 'Support Links' sidebar on the right contains contact information for IQ Gecko. In the main content area, the 'Customers' count is 6, and there are buttons for 'Manage Customer Records' and 'Manage Custom Fields'. Below this is a 'Campaigns' table with columns for Campaign Name, Campaign Customers, Campaign Transactions, Customers, Campaign Status, and Campaign Preferences. The table lists three campaigns: '1 BeanPoints', '2 BeanBucks', and 'ThankYouCoffee'. At the bottom, there are buttons for 'Add a New Campaign', 'View On-Hold Campaigns', 'Campaign Reports', and 'Manage Authorized Users and their permissions'.

Campaign Name	Campaign Customers	Campaign Transactions	Customers	Campaign Status	Campaign Preferences
1 BeanPoints	5	120	Add Lookup	Deactivate	Edit
2 BeanBucks	2	21	Add Lookup	Deactivate	Edit
ThankYouCoffee	0	0	Add Lookup	Deactivate	Edit

The screenshot shows the 'Manage Customer Records' page. It features a search section with a 'Find a customer:' label and a 'Fill in any of the fields below:' instruction. There are input fields for 'Account Code / Card #', 'First Name', and 'Last Name', along with a 'Find' button. Below this is a section for 'or show a list of ALL customers:' with buttons for 'By Account Code / Card #', 'By First Name', 'By Last Name', and 'By Date of Last Activity'. At the bottom, there is an 'Import Customers and Transactions' section with a 'Done' button and two buttons: 'Import Customers' and 'Import Customer Transactions'. A 'Support Links' sidebar on the right is also visible.

Import

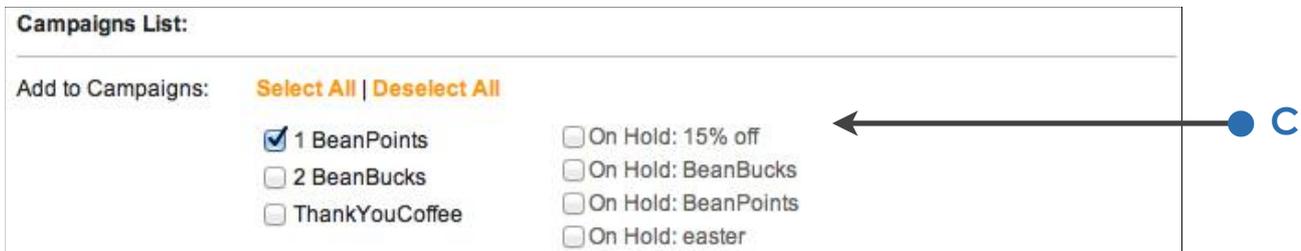
Customers (continued)

- C** Select the campaign(s) you want those customers to be added to.
- D** Specify how each column is separated, and in what order.

Campaigns List:

Add to Campaigns: **Select All** | **Deselect All**

<input checked="" type="checkbox"/> 1 BeanPoints	<input type="checkbox"/> On Hold: 15% off
<input type="checkbox"/> 2 BeanBucks	<input type="checkbox"/> On Hold: BeanBucks
<input type="checkbox"/> ThankYouCoffee	<input type="checkbox"/> On Hold: BeanPoints
	<input type="checkbox"/> On Hold: easter



Field Order:

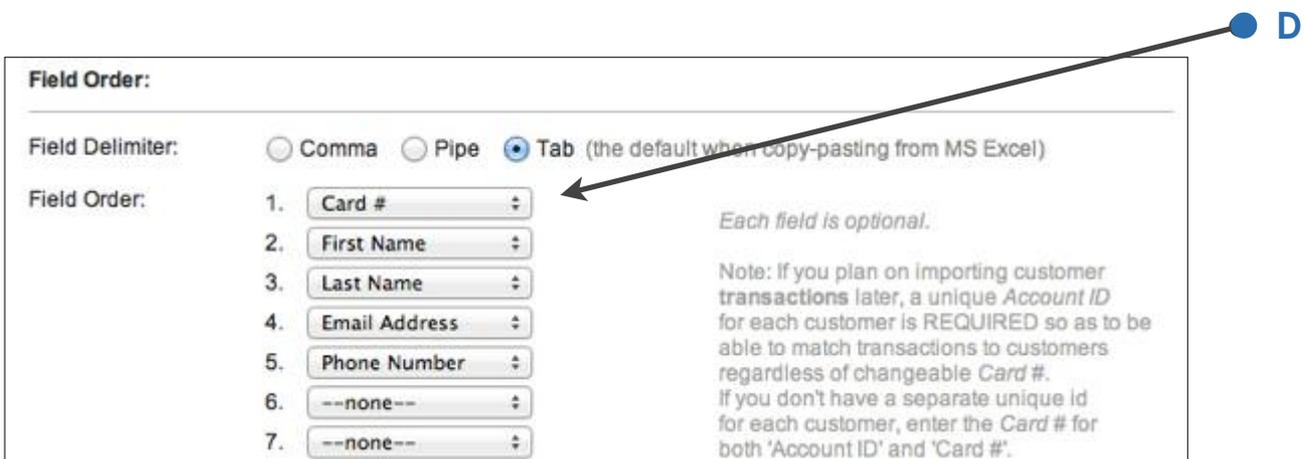
Field Delimiter: Comma Pipe Tab (the default when copy-pasting from MS Excel)

Field Order:

1.	<input type="text" value="Card #"/>
2.	<input type="text" value="First Name"/>
3.	<input type="text" value="Last Name"/>
4.	<input type="text" value="Email Address"/>
5.	<input type="text" value="Phone Number"/>
6.	<input type="text" value="--none--"/>
7.	<input type="text" value="--none--"/>

Each field is optional.

Note: If you plan on importing customer transactions later, a unique *Account ID* for each customer is **REQUIRED** so as to be able to match transactions to customers regardless of changeable *Card #*. If you don't have a separate unique id for each customer, enter the *Card #* for both 'Account ID' and 'Card #'.



Import

Customers (continued)

- E** Copy-paste your list in the large box, and check the box if you want matching records (with the same account id / card #) to be over-written or ignored.

Note1: The first row is not imported as it is your column header (Card#, First Name, etc) and is only used so that you can confirm that you have imported data for you to compare with your "Field Order" (step D) that you have aligned all the data correctly.

Note2: Dates can be in any of the following formats (Years must be in 4-digit format): YYYY/MM/DD, YYYY-MM-DD, YYYY.MM.DD, MM/DD/YYYY, MM-DD-YYYY, MM.DD.YYYY

- F** Click "Import Customer"

Customer List:

Duplicates? Skip
 Update
 Overwrite

Paste the customer list in the box below:

Card #	First name	Last Name	Email	Mobile
1234	Bill Sample	iqit1@me.com	0414.915.456	
1235	Sam Bimple	iqit1@me.com	(02) 8007.6440	
1236	Ben Himple	iqit1@me.com	(07) 1234.5678	
1237	Henry Dimple	iqit1@me.com	(03) 5678.1234	

Import Customers

Import Customers and Transactions Done

Import Successful
4 new customers imported

Import Customers Import Customer Transactions

Previous Imports:
2013-03-03 20:03:52 Undo

Import Customer Transactions

- A click on “Manage Customer Records”
- B click on “Import Customer Transactions”

The screenshot shows the 'Bean Hooked' account dashboard. At the top right, there is a 'Support Links' section with the IQ Gecko logo and contact information: Email Address: michaelr@iqgecko.com.au, Phone Number: +612 80076440. A blue circle labeled 'A' is positioned next to the 'Support Links' section. An arrow points from this circle to the 'Manage Customer Records' button in the 'Customers' section. The 'Customers' section shows 6 customers and includes buttons for 'Manage Customer Records' and 'Manage Custom Fields'. Below this is a 'Campaigns' table with columns for Campaign Name, Campaign Customers, Campaign Transactions, Customers (Add, Lookup), Campaign Status, and Campaign Preferences. The table lists three campaigns: 1 BeanPoints (5 customers, 120 transactions), 2 BeanBucks (2 customers, 21 transactions), and ThankYouCoffee (0 customers, 0 transactions). There are also buttons for 'Add a New Campaign' and 'View On-Hold Campaigns'. At the bottom, there are sections for 'Campaign Reports' and 'Manage Authorized Users and their permissions', both with 'Show' buttons.

The screenshot shows the 'Manage Customer Records' page. At the top right, there is a 'Support Links' section with the IQ Gecko logo and contact information: Email Address: michaelr@iqgecko.com.au, Phone Number: +612 80076440. A blue circle labeled 'B' is positioned next to the 'Support Links' section. An arrow points from this circle to the 'Import Customer Transactions' button in the 'Import Customers and Transactions' section. The 'Manage Customer Records' section includes a 'Find a customer:' form with fields for 'Account Code / Card #', 'First Name', and 'Last Name', and a 'Find' button. Below this is a section for 'or show a list of ALL customers:' with buttons for 'By Account Code / Card #', 'By First Name', 'By Last Name', and 'By Date of Last Activity'. At the bottom, there is a section for 'Import Customers and Transactions' with buttons for 'Import Customers' and 'Import Customer Transactions'.

Import

Customer Transactions (continued)

- C** Using the DropDown box - design the applicable Field Order selection so that it reflects the order of the columns in your Microsoft Excel spreadsheet that you wish to import.

Note: You MUST include the “**Required: Redeem Event (Y/N)**” field as StickyFeet needs to know if you wish to convert the imported “Transaction Amount” into Points - based on your campaign design (example: 5 points for every dollar).

In your MS Excel spreadsheet - if you currently do not have a column designated to this decision then please add a column with a simple **Y** (for YES, please convert the value for points) or **N**, (for NO, do not convert the value for points).

- D** In your MS Excel spreadsheet - ensure that you include the customer “Account Code / Card #” that you want to import your customer transactions into.

- E** In your MS Excel spreadsheet - ensure that you include the applicable “Campaign ID” that you want to import your customer transactions into.

Note: Your Campaign ID is found in the Client Tool Box by clicking on the “Edit” button of your designated campaign.

The image shows three screenshots from a software interface. The first screenshot, labeled 'C', shows the 'Field Order' configuration. It has a 'Field Delimiter' section with radio buttons for 'Comma', 'Pipe', and 'Tab' (selected). Below is a 'Field Order' list with 7 items: 1. Required: Campaign ID, 2. Required: Account Code / Card #, 3. Optional: Transaction Amount, 4. Optional: Description / Auth., 5. Required: Redeem Event (Y/N), 6. --none--, 7. --none--. A blue dot 'C' is to the right of item 5, with an arrow pointing to its dropdown arrow. The second screenshot, labeled 'D', shows a 'Campaigns' table with columns: Campaign Name, Campaign Customers, Campaign Transactions, Customers, Campaign Status, and Campaign Preferences. The first row is '1 BeanPoints' with 10 customers and 131 transactions. A blue dot 'D' is to the right of the 'Edit' button, with an arrow pointing to it. The third screenshot, labeled 'E', shows the 'Edit' dialog for '1 BeanPoints'. It has a 'Campaign Name' field with '1 BeanPoints' and a 'Set' button. Below is the 'Campaign ID' field with the value '0629749237198788'. A blue dot 'E' is to the right of the ID field, with an arrow pointing to it.

Field Order:

Field Delimiter: Comma Pipe Tab (the default when copy-pasting from MS Excel)

Field Order:

1. Required: Campaign ID
2. Required: Account Code / Card #
3. Optional: Transaction Amount
4. Optional: Description / Auth.
5. Required: Redeem Event (Y/N)
6. --none--
7. --none--

Campaigns

Campaign Name	Campaign Customers	Campaign Transactions	Customers	Campaign Status	Campaign Preferences
1 BeanPoints	10	131	Add Lookup	Deactivate	Edit

1 BeanPoints Done

Campaign Name: 1 BeanPoints Set

Campaign ID: 0629749237198788

Import

Customer Transactions (continued)

- F** If you wish for your imported “Transaction Amount” to be converted please ensure that you tick the “Convert Transaction amount into campaign tracks” section.
- G** If you wish alert your customers that you have imported their points using the automated email text that you set up in your campaign, then tick the “Send Email” option.
- H** Copy from MS Excel and Paste the customers' transactions data in the box.
- I** Press on the “Import Customer Transactions” button.

Transaction List:

Convert transaction amount into what the campaign tracks? ← **F**

Send Email? ← **G**

Campaign ID	Card#	Transaction date	Transaction amount	Description	Redeem
0629749237198788	98761	1/01/13	5	Gloves	N
0629749237198788	98762	2/02/12	10	T-Shirt	N
0629749237198788	98763	1/03/11	15	Jacket	Y
0629749237198788	98764	1/04/10	20	Helmet	N

Import Customer Transactions ← **I**

Import Customers and Transactions Done

Sample
of a successful 'IMPORT Customer Transactions update

Import Successful
5 new transactions recorded

Previous imports:

2013-03-05 10:10:08	<input type="button" value="Undo"/>
2013-03-05 10:04:46	
2013-03-03 20:03:52	

Previous imports:

2013-03-05 10:14:24	<input type="button" value="Undo"/>
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Want to get in touch?

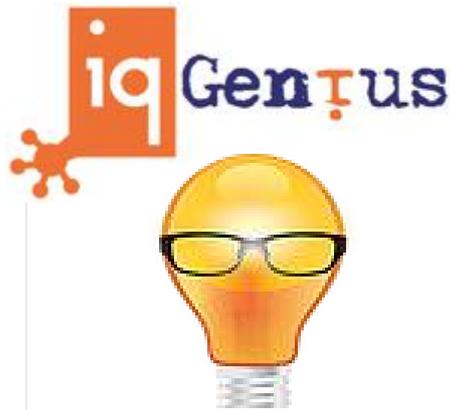
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Write

StickyFeet@IQGecko.com.au
Post: PO Box 6637, Rouse Hill, NSW, Australia 2155