

LOGO HERE <<



Remember to call him after work

Client Dashboard Quick Guide



Features

Setup



Account Settings

Set up and manage your business loyalty account.



Loyalty Program Campaigns

Set up and manage a loyalty program that works best for your business and your marketing goals.



Memberships

Create and manage a membership program to reward customers based on how much they contribute to your business.



Email & SMS Communications

Engage customers further through Email and SMS.



Customer and Transaction Fields

Customize the information you get from your customers and their transactions.



Employee Roles & Permissions

Control access to the loyalty program for every single employee

Usage



Record Customer Visits

Use this mobile responsive interface to record customer visits and redemptions.



Customer Records

Access and manager all customers participating in your loyalty program.



Dashboard Insights

Monitor your loyalty program performance from a single screen.



Generate Reports

Get the data you need to improve and enhance your loyalty program.



Export Data

Export data to analyze it further or to import it into any 3rd party service.



Boost Promotions

Automate your promotions and create incentives to drive more visits and boost your business.

Account Settings

Set up and manage your business loyalty account

The screenshot displays the 'Account Settings' page with a dark sidebar on the left containing navigation options like 'Dashboard', 'Customers', 'Locality', 'Automations', 'Subscriptions', 'Settings', 'Account Information', 'Customer Status', and 'Transaction Tools'. The main content area is divided into several sections:

- Business Information:** Fields for Business Name (Edge Area), Address Line 1 (43279 Lerner Blvd), Address Line 2 (Apt), City (Austin), State / Province (TX), Zip / Postal Code (78748), and Country (United States).
- Contact Information:** Fields for First Name (Edge), Last Name (Area), Email Address (edge.area@edgepayments.com), and Phone Number (2024419862).
- Login:** Fields for Owner ID (89906401) and API access Security Token (800752014e51732156f030791213d381c0e4).
- Localization:** Fields for Currency Symbol (US dollar - \$) and Timezone ((GMT-06:00) Central Time (SR & Canada)).
- SMS Integration:** Includes a toggle for 'Use my [SMS] settings', a dropdown for 'Select the service provider' (Twilio), and fields for Account SID, Auth Token, and Phone Number.
- SMTP Information:** Includes a toggle for 'Use my [SMTP] settings', and fields for 'From' Email, SMTP User, SMTP Password, SMTP Server, and SMTP Server Port.

Business Information

Business Owner/Manager Contact Information

Account Unique Credentials

Account Currency and Timezone

Twilio Account Credentials to enable Transactional SMS

SMTP Credentials to send emails from your own email server
*Required

Loyalty Program Campaigns

Set up and manage a loyalty program that works best for your business and marketing goals

Add a New Campaign

The screenshot shows the 'Active Campaigns' section of a dashboard. It includes a sidebar with navigation options like Dashboard, Customers, Loyalty, Campaigns, Memberships, Reports, Subscribers, Business Story, and Settings. The main content area has a search bar and a table of active campaigns. A green '+ Add Campaign' button is visible in the top right of the table area.

Select	Campaign Name	Type	Campaign ID	Campaign Status
<input type="checkbox"/>	Gift Card	giftcard	2400795741374302	Active
<input type="checkbox"/>	Points Program	points	504511382044920	Active

Lookup by Name/ID

Manage Campaign Settings, Rewards, Promotions, Etc.

Activate/Deactivate Campaigns

This screenshot shows the 'Rewards' configuration page. It features a top navigation bar with tabs for Ratio, Equivalent, Rewards (selected), Promotions, Depreciation, and Recurring Fee. Below this is an 'Add Reward' section with a table listing various reward items.

Points	Description	Reward ID	Dates Available	Qty Available	
<input type="checkbox"/>	100 Reward		unlimited	unlimited	Edit
<input type="checkbox"/>	2500 \$25 Gift Card Voucher	240079574137430225	unlimited	unlimited	Edit
<input type="checkbox"/>	5000 T-shirt	tshirt2	unlimited	4	Edit

This screenshot shows the 'Promotions' configuration page. It features a top navigation bar with tabs for Ratio, Equivalent, Rewards, Promotions (selected), Depreciation, and Recurring Fee. Below this is an 'Add Promotion' section with a table listing promotional offers.

Operand	Value	Description	ID	Start Date	End Date	
<input type="checkbox"/>	*	Rent on time 50 points	promo50	2020-03-03	2024-06-03	Edit
<input type="checkbox"/>	*	Sign up Bonus Points	promo1000	2020-03-03	2023-06-03	Edit

Memberships

Create and manage a Membership Program to reward customers based on how much they contribute to your business

Create New Membership Program

Set up Membership Program Rule and Membership Levels

Rule

Time Range: 12 months

Membership Operator: Multiply (x)

Campaigns to include

Directed to: Specific campaigns

Select Campaign(s):

- Test1
- Test2
- Points Program
- Test3

Select All | Unselect all

Cancel Save

Membership level

ID Level	Membership level	Qualifier Accrued	Points Multiplier	
<input type="checkbox"/> 53	Basic	0	1.00	Edit
<input type="checkbox"/> 56	Silver	10000	1.50	Edit
<input type="checkbox"/> 57	Gold	50000	2.00	Edit

Action

Email & SMS Communications

Engage your customers further with Transactional Emails & SMS

The screenshot displays the 'Manage Email Templates' interface. A callout 'Create New Template' points to the '+ Add Email Template' button. A table lists existing templates with columns for Template ID, Template Name, Campaign, and Rule. A callout 'Edit template and choose from any of the Rules available' points to the 'Edit' button in the 'Rule' column. Below the table, a 'Rule' configuration window is shown with a dropdown menu for 'Send this email when' and a 'Campaign' dropdown. The 'Email Content' window is also visible, showing fields for 'Email Subject' and 'Email Content', along with merge and balance fields. An 'Image Properties' dialog is open over the content editor, with a callout 'Upload images for any Email Template' pointing to the 'Choose File' button.

Callouts:

- Create New Template
- Edit template and choose from any of the Rules available
- Upload images for any Email Template

Customer Fields

Collect from your customers the information that is relevant to your business and your marketing efforts

Predefined Customer Fields that are ready to enable and use

The screenshot displays the 'Customer Fields' management interface. It is divided into two main sections: 'Predefined Customer Fields' and 'Custom Fields'. The 'Predefined Customer Fields' section lists various fields with 'Show' toggles. The 'Custom Fields' section shows a table of existing fields and an 'Add Custom Field' button.

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

Select	Show	Unique	Is ID	Label	Type	List Options	Action
<input type="checkbox"/>				Any other info HERE	Text		Edit
<input type="checkbox"/>	<input checked="" type="checkbox"/>			Card Brand	Pick	Toyota,Mazda,BMW	Edit
<input type="checkbox"/>	<input checked="" type="checkbox"/>			Interests	Pick List	Music,Sports,Night Life,Games	Edit
<input type="checkbox"/>	<input checked="" type="checkbox"/>			Marital Status	Pick	Single,Married,Other	Edit

Create your own Custom Customer Fields

- ✓ Choose to show or not your new field on this Client Dashboard
- ✓ Create a field to use as an additional ID
- ✓ Make a field unique across your account
- ✓ Fields formats: Text, Date, List, Picklist

The 'New Custom Field' form includes the following elements:

- Toggles for 'Show' (checked), 'Is ID', and 'Unique'.
- A 'Label' input field.
- A 'Type' dropdown menu set to 'Text'.
- 'Cancel' and 'Save Changes' buttons.

Transaction Fields

Collect the transactional data that is key to your business

Create your own Custom Transactional Fields

- ✓ Choose to show or not your new field on this Client Dashboard
- ✓ Make a field unique across your account
- ✓ Fields formats: Text, Date, List, Picklist
- ✓ Collect transactional data when doing the following activities: Accruals, Redemptions, All.

New Transaction field

Show Unique

Label:

Type:

Activity Type:

Transaction Fields + Add Transaction Field

Select	Show	Unique	Label	Type	List Options	
<input type="checkbox"/>			Additional Transaction Info	Text		Edit
<input type="checkbox"/>	✓		Payment Method	Pick	Cash,Credit,Gift Voucher	Edit
<input type="checkbox"/>	✓		Card Type	Pick	VISA,Master Card,American Express,Discovery,Other	Edit

Showing 1 to 3 of 3 entries

Employee Roles & Permissions

Control access to the loyalty program for every single employee

Add a New Employee

Manage Authorized Employees and Their Permissions

User	First Name	Last Name	Role	
demogooch	Admin Customer Portal (demo em)		Administrator	Edit
edgernewson	Edger	New User (test 2)	Manager	Edit
demofac	demofac	demofac	Agency Client	Edit
cloudclerk	cloudclerk		Clerk	Edit
cloudcampaign	cloudcampaign		Campaign Manager	Edit
cloudclient	cloudclient		Agency Client + Imports	Edit
cloudtemp	cloudtemp		Temp	Edit
cloudact	cloudact			
cloudobserver	cloudobserver			
cloudmanager	cloudmanager			

Showing 1 to 10 of 12 items | 10 records per page

Actions

Employee Role

- Administrator
- Manager
- Agency Client
- Agency Client + Imports
- Campaign Manager
- Associate Manager
- Clerk
- Temp
- Fulfillment Contractor
- Accountant
- Observer

Campaign Access

Select which campaigns this user is allowed access to. (Administrators automatically have access to all campaigns)

Select Campaign(s):

- Active Campaigns**
- Gift Card
- Points Program
- Buy X, Get 1 Free
- Select all | Unselect all
- Deactivated Campaigns**

Cancel Save

Record Customer Visits

Use this mobile responsive interface to record customer visits and redemptions

Step 1: Home Screen

Buttons: + Add Customer, Customer Search, Refresh Settings

Step 2: Customer Profile

Member ID: 777888
Name: Amy Adams
Email Address: amy.a.edgar@gmail.com
Phone Number: 12024419862

Select Campaign	Balance
Gift Card	\$75.00
Points Program	4,792 Points

Step 3: Action Screen

Campaigns: Points Program, 4,792 Points

Actions: Purchase, Redeem, Activity

Points Program: 4,792 Points | \$ 239.60

Enter Purchases Total \$: 0.00
Authorization: []

View Promotions [1]

Send Email
 Send SMS

Record Points

Customer Records

Manage customer records. Add, lookup, delete, edit, view account details, and track activity and monetary contribution to your business

The interface is divided into several sections:

- Header:** Includes a navigation menu on the left with options like Dashboard, Customers, Search, New Customer, Loyalty, Automations, Business Users, and Settings. The main header has an 'Add Customer' button and a search bar.
- Customers List:** A table with columns for Customer ID, Name, Campaign Activity, and Last Activity. A search bar above the table allows for 'Lookup by Name/ID'. A 'Generate List' button is also present.
- Customer Details:** A detailed view for a specific customer (Member ID: 777888) showing personal information (Name: Amy Adams, Email Address, Phone Number) and account details (JA Rewards Club Gold).
- Campaign Activity:** Two pie charts showing 'Redeemed' (orange) and 'Earned' (green) percentages for Gift Card and Points Program. Below the charts are tables for Earned, Redeemed, and Balance amounts.
- Spent:** A table summarizing monetary contributions across different campaigns.

Callouts and their corresponding actions:

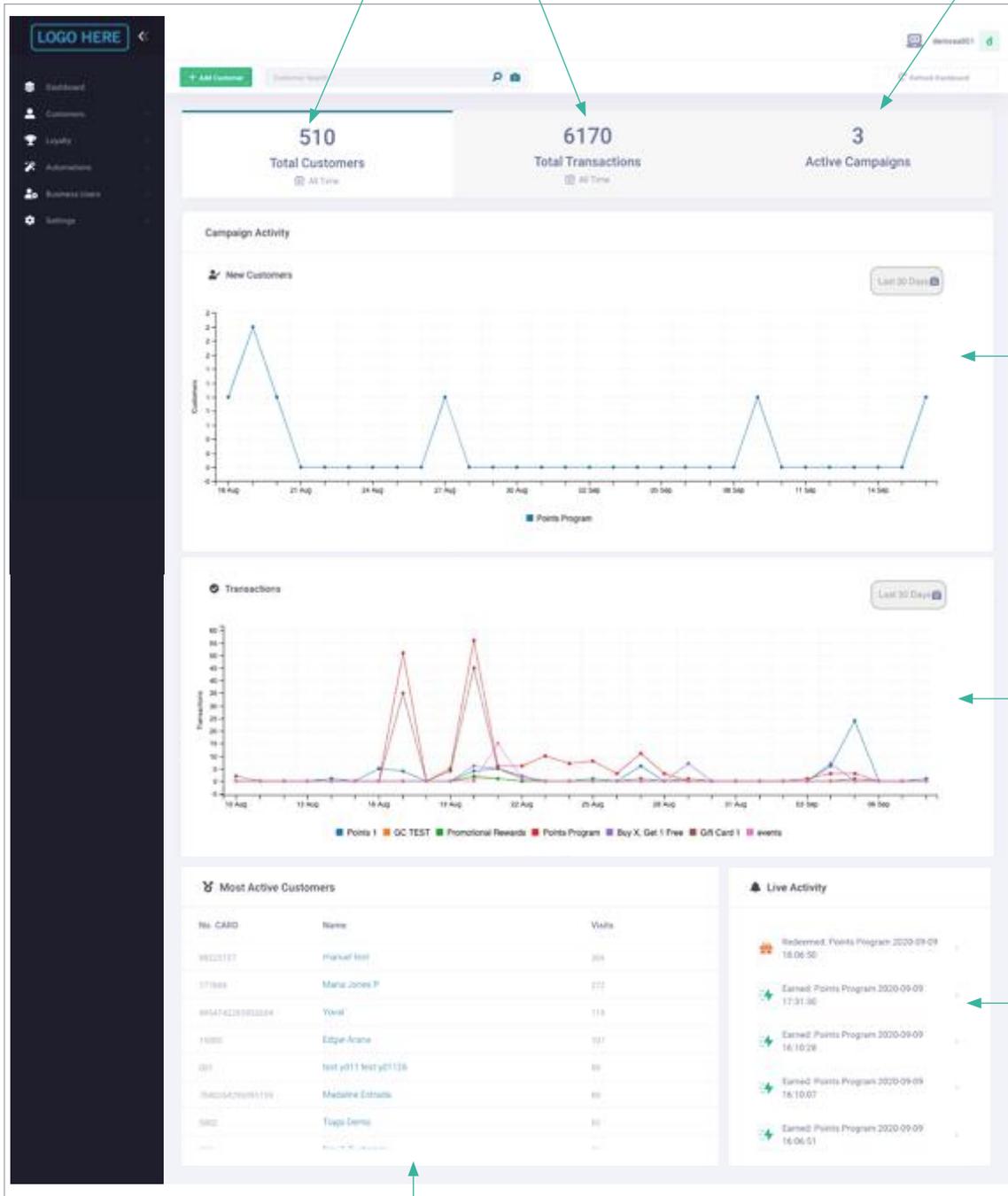
- Add a New Customer:** Points to the '+ Add Customer' button in the top right.
- Lookup by Name/ID:** Points to the search bar in the Customers list.
- Generate List:** Points to the 'Generate List' button.
- View Account Details:** Points to the 'Edit' button for a customer in the list.
- Delete (Admin access only):** Points to the 'Delete' button in the 'Action' dropdown.
- Campaign Activity:** Points to the Campaign Activity section of the customer details.
- Track per Consumer Monetary Contribution to your Business:** Points to the Spent section of the customer details.

Dashboard Insights

Monitor your loyalty program performance from a single screen

Compare new customers and transactions this month vs last month

Track customer counts per active campaign in your loyalty program



New customers enrolled in your program in the last 30 days tracked per campaign

Transactions on each campaign in the last 30 days

Live feed of new customers, customer visits, and redemptions

Direct access to your top 10 customers.

Reports and Data Export

Get the data you need to improve and enhance your loyalty program



Frequent Customer Report

Data Range: 01/01/2020 - 09/30/2020

Select Campaign(s):
 Gift Card
 Points Program
 Buy X, Get 1 Free

Select Customer Fields: JA Rewards Club
JA Rewards Club: Gold
Transaction Fields: Card Type
Card Type: VISA
Transactions or more: \$

Include Redeem Transactions:
Result: List Graphic

Select Report, Dates, and Campaigns to include

Include Customers and Transaction Fields to get better Customer Segments or narrow down your results

Frequent Customers

#	Name	Card #	Phone Number	Email Address
1	Trigo Corporation	2004215101	3024210201	trigo.corporation@outpayments.com
2	Billy Adams	777988	11028419862	www.kidger@gmail.com

Showing 1 to 2 of 2 entries

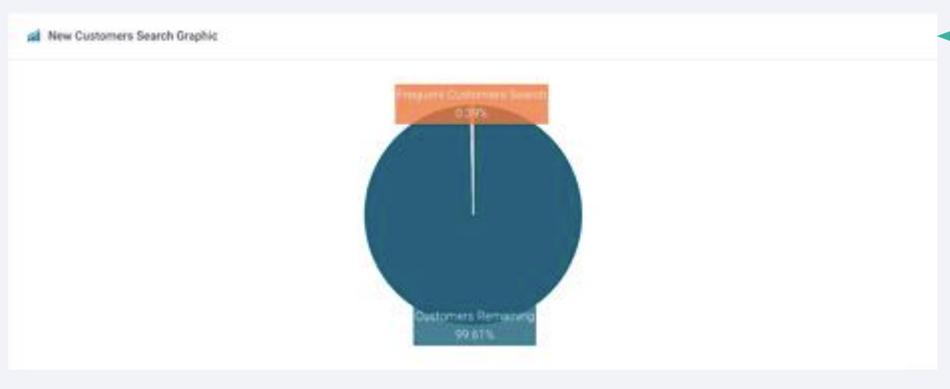
Export Options: CSV, XLS

Choose to Export your list to CSV or Excel

Frequent Summary Search

Total Customers	511	Date Range	2020-01-01 - 2020-09-30
Total Frequent Customer's Search	2	Percentage Frequent Customer's Search	0.39%

Summary



Results Pie Chart

Boost Promotions

Automate your promotions and create incentives to drive more visits and boost your business

Create New Boost Promotion

Setup your Boost Rules and Conditions

Define the rewards

Notify your Customers

Name	Type	Active Campaign	Start	End	Days	Receiving Campaign
September Charity Contribution	Temporary	Points Program	2020-09-01 00:00:00	2020-09-30 22:00:00		Monthly Charity

Showing 1 of 1 entries

Update Boost Promo

Define a boost promotion in one campaign that results in a value being added in the same or another campaign

Boost Name: September Charity Contribution

Boost Type: Fixed Temporary Recurring

Start Date: 2020 Sep 1

Start Time: 0:00

End Date: 2020 Sep 30

End Time: 22:00

Active Campaign: Points Program

Conditions

Apply to all transactions received: Yes No

Apply only to the first customer that reaches the threshold amount: Yes No

Apply only the first time a customer reaches the threshold amount: Yes No

Rewards

Action Type: Add Multiple

Amount to add: 1

Include transaction amount: Yes No

Receiving Campaign: Monthly Charity

Notifications

Send Boost Email notification? Yes No

Choose Template: Select

Send Boost SMS notification? Yes No

Cancel Save



MILLIONS* OF LOYAL CUSTOMERS

(OK! MAYBE NOT MILLIONS, BUT LOTS AND LOTS)

2 5 9 9 9 9 9 9 8



+61 2 8007 6440



stickyfeet@iqgecko.com.au



www.iqgecko.com.au



Facebook with IQ Gecko
www.facebook.com/IQGeckoLoyalty



Tweet with IQ Gecko
<https://twitter.com/IQGecko>



LinkedIn with IQ Gecko
www.linkedin.com/company/iq-gecko