SMARTCARD

Mobile App Features

Consumer - Administration

- User-friendly Registration from the App Start up Page
- Once Logged in you can sort by distance from your current location or savings %
- Select the restaurant of choice then the down arrow
  - Description of merchant
  - Any disclaimers or limitations issued by the merchant
  - Favorite – if selected will add this to your list of favorite merchants
  - Map – Driving directions from your current location
  - Hours – Restaurant hours and the hours the offer is available
  - Share – Text, Email, Facebook, Twitter
  - Call – Direct dial to the restaurant
  - Web – Direct link to the restaurant's website
- Select the red circle to access app features
  - Logout – Log out of app
  - Support – Emails support with any questions or app issues
    - Support answers emails within 1-2 hours during business hours 8:00 am - 5:00 pm central time, and 5-6 hours after hours and on weekends. We strive to have all app related issues resolved within 24 hours of the issue being reported.
  - Favorites – Shows the restaurants selected as favorites
  - Profile
    - Name
    - Email
    - Zip Code
    - Birthday
    - Password – can update here at any time
    - Security Question – can update here at any time
  - History – Shows all historical data including credits and debits from account. Also shows the transaction ID# for reference at the restaurant.
  - Money – Allows customer to add money to SmartCard at any time
    - Money may be added in $5 increments from $5 - $100 (Over $100 requires a separate transaction)
    - Add another card – allows you to add multiple credit cards to the SmartCard account.
    - Using card ending – allows you to select the credit card on file that you want to use
      - Delete a card – slide left on the credit card and select delete
      - Edit a card – slide left on the credit card and select edit then change the credit card information

Consumer - Usage

- Consumer notifies cashier that they will be paying via the SmartCard (consumer is responsible for adhering to any disclaimer issued by the merchant)
- Consumer selects green pay now screen and Payment to screen pops up
- Consumer enters the total bill amount and gives the phone to the cashier to confirm the amount.
- Cashier confirms amount and discount and total amount due is shown.
- Pay now – Select green Pay Now button
  - If funds are available to cover the total amount due the app will prompt to confirm amount to the name of the merchant
  - If there are not enough funds to cover the transaction the app will prompt the consumer to add funds.
    - Add money – The consumer may add money in $5 increments from $5 - $100
    - Add exact amount – The consumer may add the exact amount needed to satisfy the bill from the merchant.
    - Email automatically sent to consumer confirming the amount charged to their credit card.
    - Once sufficient funds are added, the app will prompt consumer to confirm payment of $xxx to the name of the merchant
- Confirmation message – States information about transaction
  - Payment successful
  - Merchant Name
  - Original Amount = Amount deducted from trade
  - Discounted Total = Amount deducted from SmartCard balance or charged to credit card
  - Transaction # - Unique number given to the cashier to verify that a purchase was made.
  - Disclaimer – Reminder to consumer that tips are not included on the app and to please tip the server on the original amount. Gives suggested tip amount
  - Email automatically sent to consumer confirming the amount charged to their credit card.

SmartCard CMS (Content Management System) Features

Media Partners

- **Dashboard**
    - To be completed at later date
- **Transaction – Listing of all Merchant Transactions by date**
    - Export to Excel/CSV
    - Search by any category
    - Date – Date transaction occurred
    - Transaction ID – Internal use only
    - First Name/Last Name – Select first or last name and switch to that customer's screen showing all transactions for that customer in a date range
    - Merchant (with location if merchant has multiple locations) - Select merchant to go to the merchant file and see all transactions in a date range
    - Address
    - City
    - State
    - Zip
    - Pre-Discount – The amount of the customer's check before discount
    - Post-Discount – The amount the customer actually paid
    - Savings – The difference between Pre-Discount – Post Discount
    - Delete – Internal use only allows media partner to delete an incorrect transaction

Merchants

- **Add New Merchant**
    - Create New Merchant Screen
        - Account
            - Merchant Name
            - Select Category – Drop Down
                - Activities
                - Dining
                - Entertainment
                - Health and Beauty
                - Services
            - Sales Representative – Drop Down
            - Commission Rate – Each sales person can be paid a different sales person for each merchant
        - Account Manager Information – The person responsible for managing the SmartCard transactions
            - User First/Last Name – Merchant contact information
            - Phone number – This may or may not be the merchant's public telephone number this is the manager's information
            - User Email – The email of the account manager. Also, used as login id

        - User Password – Password account manager will use to log in to the CMS
    - App Information
        - Teaser – limit 50 Characters
        - Description
        - Web Address
        - Logo
        - Disclaimer – In the app in red showing all limitations the merchant has placed on the customer using the app
        - Contact First/Last Name – Usually the same as the user above
        - Slide Show Images – (Optional) images that can be displayed on the app
    - Once all information is complete Select Save Merchant Info and Add Location information
- **New Location**
    - Address
        - Location Name/Nickname – Displays on App next to the name
        - Location is Active – Check mark
        - Allow Negative – Allows customers to continue using the app after the monthly trade allowance is used
        - User monthly limit – Tracks the customer usage in the app and notifies the customer how many times he/she can visit each month – Displays in the disclaimer section of app
        - Address/Phone Number – Merchant information – displays on app
        - Go Live At – Day that merchant is displayed on the app
    - Financial Information
        - Contract Start Date
        - Contract Amount
        - Monthly Limit – Merchant is removed from app after monthly limit is reached
        - Max Transaction Amount – Max amount that 1 customer can spend in 1 transaction – Displayed on the disclaimer portion of the app
        - Savings (Percentage) – set by media partner unless agreed upon with merchant
        - Partner Split – Internal Use Only
        - Merchant Split – Revenue Share with Merchant
        - Email Transaction Report at – Time to be decided by merchant
        - Email Transaction Report to – Email address
        - Notify Transaction – Sends an email with every transaction
        - Include Balance – Check only if requested by merchant
    - Hours of Operation – Displays all days/hours the business is open on app
    - Hours offer is Valid – Displays the days/hours the offer is valid
- **Average Savings – Display the average savings of all the merchants**
- **Merchant Listings**

- Display – All, Active, Inactive, Deleted (Only active and inactive are included in the all listing)
- Active – Green Checkmark if location is active
- Merchant name – Select Merchant name to edit any of the information previously entered when location was added
  - Locations
    - Breakdown – Select to view merchant information by month
      - Month/Year – Select to view all merchant transactions in a particular month
      - Financial Adjustment – Adjusts the merchant's balance if needed (Description required). Note – All adjustments may be deleted.
    - Edit – Select to edit any of the information in the location tab
    - Delete – Deletes all location information
- Contract – Original Contract Amount input on location page
- Contract Balance – Balance left in Original Contract
  - Select to go to the Merchant Monthly Breakdown Page
  - Monthly Limit – Displays the limit input on the location page
  - Monthly Available – Displays the accumulated monthly available with rollovers from previous months
  - Current Sales – Displays the total sales for the current month
  - Savings – Select to go to the Merchant Location Page
  - Notes – Select to go to the comments page
    - Add Merchant Comments
  - Loc – Select to go to the edit merchants screen to see the locations
  - Transactions – Select to go to see all transactions for a particular merchant in a date range (Date range can be changed on screen)
  - Log In – "Impersonates" merchant in order to troubleshoot issues a merchant is having without having to log in directly to the merchant's account.
  - Actions – Deletes Merchant and ALL transactions related to merchant

Customers

- **Update Results by Dates**
  - Customer Search – Search by First or Last Name
  - Start/End Date
  - Filter by – Drop Down
    - Last Purchase Date
    - Register Date
    - Last Login Date
  - Update – Activates Search
  - Export to Excel/CSV
  - App Message to Customers
    - Creates Alerts/Push Notifications to customers
      - Message – Shows all push notifications sent

        - Create Alert
            - Select Date
            - Select Time
            - Content
            - User Filter
                - Dropdown
                    - No Filter
                    - Last Transaction Date
                    - Register Date
                    - Last Login Date
                - Start/End Date (for filter)
                - Update Filter
                - Number of users this push will reach
            - Submit
- Customers
    - First/Last Name – Select to show all transactions for a specific customer
        - Filter Transaction – Filter by:
            - Start/End Date
            - Merchant – Dropdown to select the merchant
            - Type – Dropdown
                - All transactions
                - Credit Only
                - Purchases Only
        - Transaction History
            - Date
            - Transaction ID – ID # given to merchant to verify transaction
            - Auth ID – Internal use only
            - Type
                - Debit
                - Credit
            - Deposits
            - Pre-Discount – Merchant bill before any discounts are used
            - Post-Discount – Amount actually deducted from customer balance
            - Savings – Amount customer saved per transaction
            - Merchant
            - Admin Adj.
            - Comments – All admin adjustments must have comments added for paper trail
    - Email
    - Balance – Current customer balance
    - Registered – Date registered
    - Last Login
    - Last Purchased

- Edit/View – Select to edit customer information
  - User Information
    - Name
    - Address
    - Select Update User Information is required for changes to take effect
  - User Credentials
    - Email
    - Reset Password
    - Secret Question/Answer
    - Select Update User Information is required for changes to take effect
  - Credit/Debit Users Balance
    - Comments – Required in order to make changes
    - Modify Balance
      - Select Dollar Amount
      - Select + to add money to account
      - Select – to remove money from account
    - Select Update User Information is required for changes to take effect
  - Back to Customer – Returns to Customer Screen
  - Customer transactions – Select to see all the customer transactions
  - Login - "Impersonates" customer in order to troubleshoot issues a customer is having without having to log in directly to the customer's account.

Reports – All reports can be exported to Excel/CSV

- **All Merch. Transactions – Transaction Report By Merchant**
  - Transaction – All customer purchases in a date range
  - Merchant Name
    - Date
    - Transaction Id
    - First/Last Name
    - Address
    - Pre-Discount
    - Post-Discount
    - Savings
- **Select Merchant Transactions – Merchant Transactions in a date range**
  - Include – Allows user to chose which merchants are reported. If no merchant is selected report defaults to all merchants
  - Merchant
  - # of Transactions
  - # of Customers
  - Pre-Discount Totals
  - Post Discount Totals

    - Total Savings
- **Split Reports – Displays Media Partner versus SmartCard income by merchant in a date range**
- **Deposit Report – Displays all customer deposits to their SmartCard accounts in a date range**
- **Ledger Reports – Displays the totals of all media partner activity in a date range**
    - Date
    - Credit Card Deposits
    - Pre-Discount Transactions
    - Post-Discount Transactions
- **Adjustments – Displays all admin adjustments to customer accounts in a date range**

Sales Reps

- **Sales Reps**
    - First/Name
    - Email
    - Reports – Select for a detailed breakdown of salesperson’s commissions in a month range by restaurant
        - Detailed Breakdown
            - Select Month
            - Update Results
                - Merchant
                - Address
                - Commission
                - Rate
                - Sales

Screen Alerts – One-time alerts that display on screen when a customer opens the app
Push Notifications

- **Creates Alerts/Push Notifications to customers**
    - Message – Shows all push notifications sent
    - Create Alert
        - Select Date
        - Select Time
        - Content
        - User Filter
            - Dropdown
            - No Filter
                - Last Transaction Date
                - Register Date
                - Last Login Date
            - Start/End Date (for filter)
            - Update Filter
            - Number of users this push will reach

                - Submit

Users – Merchant Account Manager or Media Partner Information

- **Users**
    - Filter Users by Group – Dropdown
        - Partner
        - Merchant
        - Show Deleted Users
            - Deleted User Listing
                - Search Results – Search by First/Last Name/ Email/ Group
                - Edit – Change deleted user's information. This option does not restore deleted user
                - Delete – Restores deleted user
    - Current User Listing
        - Search Results – Search by -
            - First/last Name
            - Email
            - Group
        - Edit User
            - First/Last Name
            - Email Address
            - Reset Password
            - Access Group – Dropdown
                - Partner
                - Merchant
                    - Select Merchant – Dropdown
                        - Select which merchant the user is associated with
                - Save User
                - Clear Form – Clears all information without saving
        - Add User – Merchant Users can be only be used after a merchant is set up in the merchant tab
            - First/Last Name
            - Email
            - Password
            - Access Group Access Group – Dropdown
                - Partner
                - Merchant
                    - Select Merchant – Dropdown
                - Select which merchant the user is associated with

Your Profile – Used to edit profile (Also can be accessed in the user tab)

- **Your Profile**
    - User Information
        - First/Last Name
        - Email

        - Update Information – Must be selected for changes to take place
    - Update Password
        - Change Password
        - Password Confirmation
        - Update Password – Must be selected for changes to take place