SMARTCARD

Mobile App Features

- **Registration**
  - Name
  - Email
  - Password
  - Birthdate
  - Zip Code
  - Phone #
  - Security Question
  - Referral Code
  - Link to App Terms and Conditions
- **Merchant Listing Screen** - lists all Available Merchants by filtered selections
  - Featured Merchants are forced to the top of the Merchant Listing regardless of any filters selected
  - Merchant: Teaser
  - Logo
  - Mileage from user
  - Discount %
  - Max Bill amount (set by merchant)
  - Merchant Listing Temporarily Disabled Merchants: Shown in grey:
    - Merchant app usage limitations
    - Merchant not available on current day
    - Merchant not available at current time
    - Media Partner Temp Disable for example: Closed for private event
  - **Merchant details Screen:**
    - Description
    - Disclaimers
    - Favorites
    - Driving directions
    - Hours of Operation
    - Available Hours to use app
    - Share via Text/Email/Facebook/Twitter
    - Call Merchant
    - Merchant Website
    - Visits Remaining

- **Menu Screen**
  - Current balance
  - Total Savings since registration
  - YTD spending
  - How to Use App – Simple 3 step process
  - SmartCash:
    - Referral program, partner can set $ received by referee and referral users
  - Filter:
    - Sort by Distance, Category, or Savings
    - Filter by Mileage
  - Favorites
    - Shows the merchants selected as favorites
  - Payment Method
    - User adds credit cards
    - Option to add money to account in $25 increments
    - History - Shows all historical data
      - Credits
      - Debits
      - Transaction ID# for reference at the merchant
      - Adjustments
  - Profile
    - Name
    - Email
    - Zip Code
    - Birthday
    - Password
    - Security Question
    - Link to Terms and Conditions
  - How To & FAQs
    - How To Video
    - Cascading FAQ on app usage for customer experience
  - Support – Emails support, Same business day response
- **Pay Now**
  - 1st time selected gives option to see a Tutorial Video
  - Automatically Calculates discount on Max Payment Allowed
  - Automatically Charges Credit Card
  - Creates a unique transaction ID for merchant tracking

- Auto generates an email receipt to the user and merchant (if selected)
- Auto generates merchant email with daily transaction list and transaction ID #s
- Creates Pop-up at end of transaction to let user know how many visits they have available for the rest of the month

Content Management System (CMS)

Partner Dashboard

Overview and Detailed charts and breakdown: Within any date range selected.

- **Chart-1 Total Sales**
  - Total Sales
  - % Change Monthly
  - Discounted Sales
  - Total Deposits
  - Active Users
  - % Change in users
  - # Transactions per user
  - Average transactions per user
  - Average transaction $

- **Chart-2 Individual Merchant Sales**
  - Top 6 Merchants - graph
  - Total Merchant sales
  - Pre-discounts sales
  - Post discount sales
  - Average discount
  - % of monthly limit used
  - # transactions

- **Chart-3 Customers**
  - New customers
  - Active Customers
  - % Change
  - # purchases per month
  - Average transactions per customer
  - Days to first purchase
  - Sales by zip codes

Customers -

- Filter by:
    - Last Purchase Date
    - Register Date
    - Last Login Date
- Customer Search:
    - First or Last Name
    - Email
    - Exact or partial matches
    - Start/End Date
- Export list to Excel/CSV
- App Message to Customers
    - Push Notification to all customers who have enabled notifications
- Move Transactions
    - Merge customer transactions into 1 account – Used when customers have multiple accounts in the system
- Customer On screen display
    - Customer Name – First/Last Name
        - Select to see all transactions by user
            - Specify Date Range
            - Select only transaction by specific merchant
            - Select transaction type
                - Debit
                - Credit
                - All
    - Age
    - Email
    - Zip
    - Customer Account Balance
    - Registered date
    - Last login date
    - Last purchase date
    - Users Unique Referral code
    - Edit/View – Edit or View Customer Details
        - User Information
            - Name
            - Address
        - User Credentials

                - Email (Login)
                - Password Reset
                - Secret Question
            - Credit/Debit User Balance
                - Modify customer account balance due to customer service issues or to manually give awards
        - Log In
            - Impersonate User for customer service requests
        - Delete
            - Only available if a registered user has not transaction history
            - Password Protected -Admin Only

Transactions -

Listing of all Merchant Transactions by date range

- Update
    - Change Date
- Export to Excel/CSV
- Date/Time of transaction
- Transaction ID
- First Name/Last Name
    - Select to see all transactions of customer
- Merchant
    - Select to see all the Merchant's transactions in a date range
        - Select Merchant Name to change the merchant or location when customer charges the wrong merchant
- Zip Code
- % Discount
- Pre/Post Discount
- Savings
- Delete (requires password)

Merchants -

- All Merchants
    - Display by Filter
        - All
        - Active
        - Inactive
        - Deleted
    - Merchant name

        - Select to Change Merchant Credentials
    - Contract $
    - Contract Balance
        - Select to view Usage by Month or to make Contract Adjustments
    - Monthly Limit
    - Monthly Available
    - Current Sales
    - Savings
        - Select to Change the Discount %
    - Notes
        - Write notes specific to merchant for reference
    - Location
        - Select to change location information
    - Transactions
        - Select to view Merchant Transactions in a date range
    - Log In
        - Impersonate Merchant
    - Delete
        - Permanently Disables Merchant
    - Add Merchant
        - Merchant Name
        - Category
        - Sales Representative
        - Commission Rate
        - Temp Disabled
        - Auto Enables on specific and turns merchant grey on app
        - Show Merchant Contract Balance – On Daily Emails
    - Account Manager Information
        - Merchant App Information: Shown on App
        - First/Last Name
        - Phone number
        - Email
        - Password
        - Teaser
        - Description
        - Web Address
        - Logo
        - Disclaimer

        - Contact First/Last Name
        - Slide Show Images
        - Option to set as Featured – pushes merchant to top of App

    - Location Information
        - Full Merchant Address: used for GPS location info.
        - Location Name/Nickname – Displays on App next to the name
        - Location is Active/Not Active
        - 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
            - Notifies the customer how many times they can use app each month
            - Notifies customer when their monthly allotment is used up and temp disables merchant only for that customer
        - Address/Phone Number
        - Merchant information - details displayed on app
        - Go Live At – Day that merchant is displayed on the app
    - Financial Information:
        - Contract Start Date
        - Contract Amount
        - Monthly Limit
            - Merchant is temp disabled (Turned Grey) after monthly limit is reached
            - Automatically enables Merchant once the limit resets at the beginning of the month
        - Max Transaction Amount – Max amount that 1 customer can spend in 1 transaction
        - Savings (Percentage) – Set by partner unless agreed upon with merchant
        - Merchant Split – Revenue Share with Merchant
        - Email Transaction Report at merchant select time each day
        - Notify Transaction – Option to send email after every transaction
        - Option to Include Balance in merchants back-end
    - Hours of Operation:
        - Days to show on app
        - Merchant hours of operation
        - Merchant hours not available within specific days.
- Recommend Merchants:
    - Customers can recommend a merchant via the App
        - Name

        - Email
        - Contact (Customer Name)

Notifications -

- Screen Alerts
    - Scheduled in-app screen alerts that display when a customer opens the app.
    - Includes image and text.
- Push Notifications:
    - Schedule Push Notifications
    - Unlimited messages by date/time
    - Filter by Last Transaction Date, Register Date, Last Login Date, Zip code.

Reports -

All reports date range filtered, exported to Excel/CSV

- Merchant Transaction Reports
    - Sorted by Merchant
        - Date
        - Transaction ID
        - First/Last Name
        - Zip Code
        - % Discount
        - Pre-Discount
        - Post-Discount
        - Savings
    - All Merchants Transactions
        - Creates a Report for all Merchants with transactions in a Date Range
    - Select Merchant Transactions
        - Creates a Report for Merchants selected in a Date Range
- Merchant Split Report
    - Merchants in revenue share
    - Giving $ amount split between Developer (licensing), Partner and Merchant
- Deposit Report
    - Customer deposits made via credit card, used to match credit card processing reports.
- Ledger Report
    - Daily deposits, pre and post discounts ledger (by date range)
- Adjustments
    - Displays all admin adjustments to customer accounts in a date range, including comments on each adjustment
- Sales Reps:
    - Calculates commissions of each sales rep based on merchant commission added in merchant screens.

Users -

Merchant Account Manager or Partner log in Information

- All
  - Filter By Group
    - Partner
    - Merchant
    - Show Deleted Users
  - Email by group to a selected group of users (i.e. merchants)
  - Add User
- Sale Reps:
  - List of all sales reps
  - Edit profiles
  - Review individual commission reports
  - Delete Sales Rep
  - Add Sales Rep

Account Setting –

Media Partners specific

- General Information
  - Partner Name
  - Address, etc.
- Account Manager Information
  - First/Last Name
  - Email
  - Login Password
- Graphics
  - Logo
  - Header
- Financials
  - Split Information
  - Referral and Referred reward amounts
- Notifications
  - Daily Customer Registration Notifications

Merchants Login

Merchants can login and review all details, but CAN NOT make changes

- Ability to view each location individually
- Search customers
- Transactions by date/time
- Customers by Zip code and age
- Pre/post amounts

Customer Login

- View all transactions
- Change Profile including password
- Add/Edit/Delete Payment Method
- List of all Referrals (Users who registered with Customers Referral Code

Automated Emails

Media Partner Emails:

- Email report daily of all new registrations
- Credit Card Charge – (Internal to help prevent customer error and chargebacks)
- If a charge is over $100 alert is sent to accounting
- Same use has the same charge within 5 minutes alert is sent to accounting
- Daily list of new registrations

Customers Emails:

- After every transaction: Includes: Merchant name, Pre/Post amount,

Merchant Emails:

- Optional: After every transaction
- Nightly recap of all transactions for the day