



POINT OF MARKETING®  
CERTIFIED

**User Guide**

# Point Of Marketing<sup>®</sup> Online

Point Of Marketing<sup>®</sup> Online is our responsive, easy-to-use, cross-platform online tool which makes processing your transactions fast and easy.

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## Login, Installation & Configuration

### Login

To login, visit <http://online.pointofmarketing.net/> and enter the credentials provided by your representative.

### Installation

Click the bookmark icon in the top left of the browser, then tap Add to Home Screen:



Click Add in the upper right of the displayed prompt:

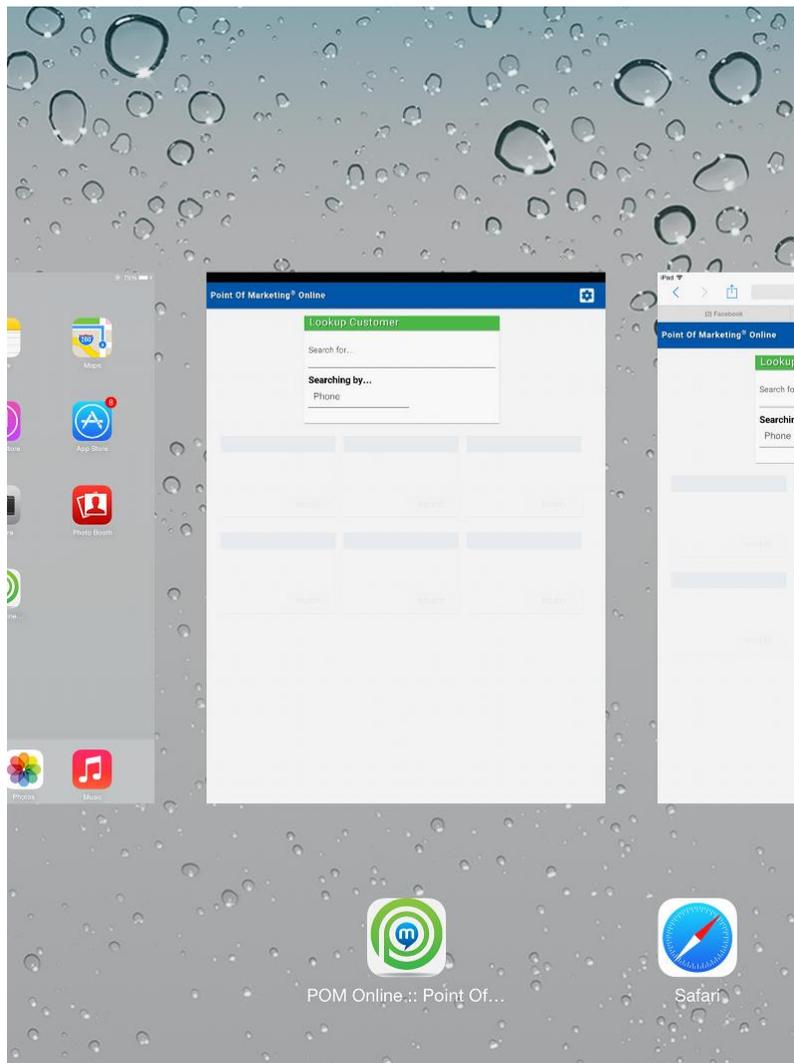


The POM Online icon will be added to your home screen:



Tap the icon to open POM Online in fullscreen mode.

To switch between POM Online & your POS, tap the Home button on your device twice to display all apps. Just tap on the app you would like to switch to using:



## Configuration



Setup your account by clicking the white gear icon in the upper-right of the screen. A dropdown will appear with Configuration and Log Out. Select Configuration.

Keeping it simple, there are 4 options in the configuration window:

**1. Enable Clerk ID**

If your program requires Clerk ID numbers (highly recommended), check this box.

**2. Enable Gift Card Transactions**

If your program includes Gift Cards, check this box.

**3. Transactions are in points. Unchecked means transactions are in dollars.**

If your program only includes points and does not track transactions in terms of dollars, check this box. *Most merchants leave this unchecked.*

**4. Enable Redeeming Points w/o Reward Certificate**

For programs where points can be redeemed for a specified value, not necessarily tied to a reward or promotion, check this box.

*Most merchants leave this unchecked.*

**5. Account Fields**

These are the fields and information you'd like to capture when enrolling a new customer. By default you'll be capturing the First Name, Email Address, and Phone Number. For Rapid Enrollment have just the Birthday Box checked.

Here is a configuration window common to most merchants:

The screenshot shows a configuration window titled "Configuration" with a green header. It contains several settings:

- Enable Clerk ID
- Enable Gift Card Transactions
- Transactions are in points. Unchecked means transactions are in dollars.
- Enable Redeeming Points w/o Reward Certificate

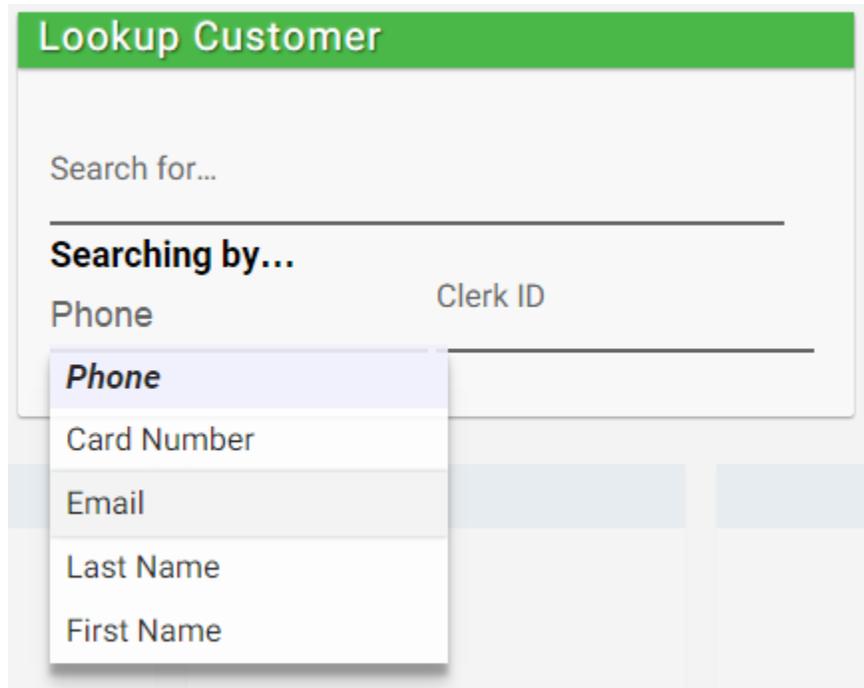
Below these is a section titled "Account Fields" with the following options:

- Card Number
- Title/Honorific
- Last
- Address
- Household Size
- Texting
- Birthday
- Birthday Year
- Anniversary
- Anniversary Year

At the bottom of the window are two buttons: "CANCEL" and "SAVE".

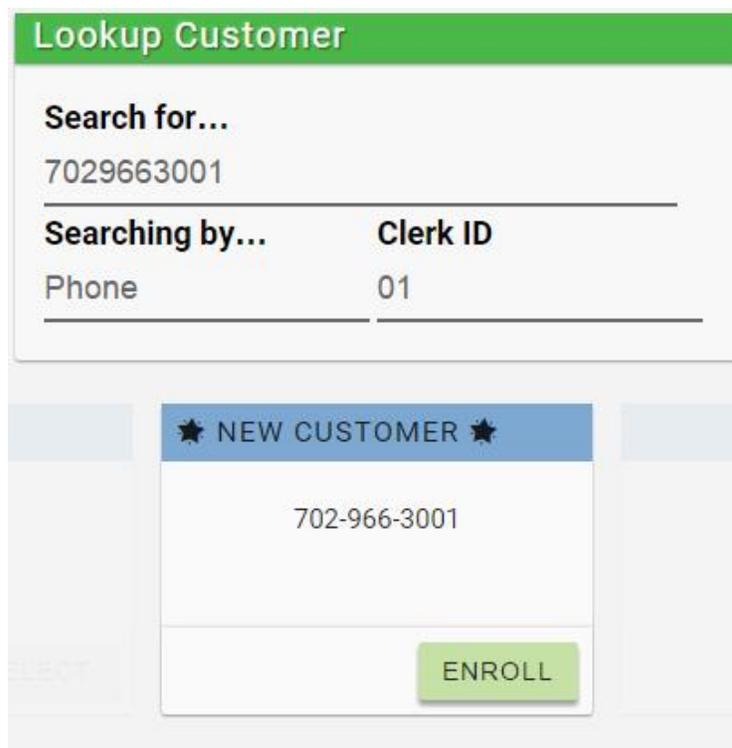
## Enrolling A Customer

After saving your configuration, you will be presented with a Lookup Customer screen. Tap the Phone title.



The screenshot shows the 'Lookup Customer' interface. At the top is a green header with the text 'Lookup Customer'. Below it is a search bar with the placeholder text 'Search for...'. Underneath the search bar is a section titled 'Searching by...' with two columns: 'Phone' and 'Clerk ID'. A dropdown menu is open over the 'Phone' column, listing search criteria: 'Phone' (highlighted), 'Card Number', 'Email', 'Last Name', and 'First Name'.

Enter the phone number for the customer you wish to enroll, then click Enroll.



The screenshot shows the 'Lookup Customer' interface after a search. The search bar contains the number '7029663001'. The 'Searching by...' section shows 'Phone' and 'Clerk ID' with '01' entered in the Clerk ID field. Below this, a blue header reads '★ NEW CUSTOMER ★'. Underneath, the phone number '702-966-3001' is displayed. At the bottom right of this section is a green button labeled 'ENROLL'.

Fill in the customers information and hit Save.

**Enroll Customer**

First Name  
Dana

Phone  
702-966-3001

Email  
dana@repeatreturns.com

**Birthday**

Month                      Day  
January                      1st

CANCEL                                              SAVE

The screen will then open to allow for entering a transaction. If no transaction is being entered you can hit



at the top of your screen. If entering a transaction please see the Entering Transaction section.

**Back To Search**

**VIP Customer**

Dana  
dana@repeatreturns.com  
702-966-3001

EDIT

**Account Balance**

0                      \$0.00  
Points                      Cash

**Transaction**

\$Amount                       Sale                       Gift

—                                              ADD SALE

**0 Rewards Available**

## Editing A Customer's Information

Search for the customer.

**Lookup Customer**

Search for...

**Searching by...**

Phone Clerk ID

- Phone**
- Card Number
- Email
- Last Name
- First Name

As you search, the most likely results are shown in boxes:

Dana	Dana	
702-966-7777	702-966-3001 dana@repeatreturns.com	
SELECT	SELECT	SELECT
SELECT	SELECT	SELECT

Tap the Select button when enough information has been entered to find your customer. Once the customer's information is showing, select the edit button.

The screenshot shows a customer profile page with a blue header containing a magnifying glass icon and the text "Back To Search". The page is divided into four main sections:

- VIP Customer:** Displays the name "Dana", email "dana@repeatreturns.com", and phone number "702-966-3001". An "EDIT" button is located at the bottom right of this section.
- Transaction:** Features a "\$Amount" input field, radio buttons for "Sale" (selected) and "Gift", and an "ADD SALE" button.
- Account Balance:** Shows "0" for Points and "\$0.00" for Cash.
- 0 Rewards Available:** A section indicating the current reward status.

Make any necessary changes the hit Save.

The screenshot shows the "Edit Customer" form with a green header and star icons. The form contains the following fields:

- First Name:** Dana
- Phone:** 7029663001 (with a green "+" icon to the right)
- Email:** dana@repeatreturns.com
- Birthday:** Month: January, Day: 1

At the bottom of the form, there are "CANCEL" and "SAVE" buttons.

## Entering Transactions

### Selecting A Customer

After saving your configuration, you will be presented with a Lookup Customer screen. Tap a title to enter a value. As shown here, searches can be performed in a number of ways:

As you search, the 6 most likely results are shown in boxes:

<b>Test</b> 225-445-4458 f@ SELECT	<b>Hggfds</b> 258-369-1470 tech@repeatreturns.com SELECT	<b>Chris</b> 702-455-8655 test6@repeatreturns.com SELECT
<b>Brian</b> 987-456-3210 jfds@repeatreturns.com SELECT	<b>TestCard</b> 458-354-5357 tvdcgv@repeatreturns.com SELECT	<b>TestCard</b> 458-354-5356 tvdc4gv@repeatreturns.com SELECT

Tap the Select button when enough information has been entered to find your customer.

## Transaction Screen

The Transaction Screen is divided into 4 areas. In the left column, the customer's information, current points, and total gift card value are displayed.

In the right column, the top box allows the entry of a sale/point or gift transaction and entering the amount while the bottom box shows available rewards.

The screenshot displays a web interface for a transaction screen. At the top, there is a blue header with a magnifying glass icon and the text "Back To Search". Below this, the interface is divided into four main sections:

- VIP Customer:** A green header section containing customer details: "Dana", "dana@repeatreturns.com", and "702-966-3001". An "EDIT" button is located at the bottom right of this section.
- Transaction:** A green header section for entering a transaction. It features a "\$Amount" input field, two radio buttons labeled "Sale" (selected) and "Gift", and an "ADD SALE" button. A minus sign "-" is visible in a small box below the input field.
- Account Balance:** A green header section showing "0 Points" and "\$0.00 Cash".
- 0 Rewards Available:** A green header section with a large empty area below it, indicating no rewards are currently available.

## Redeeming Rewards

To redeem a reward, tap the reward listed in the right column's bottom box. The offer will then show in the top box. Just enter the amount of sale after you subtract any discounts given and tap the ADD SALE button.

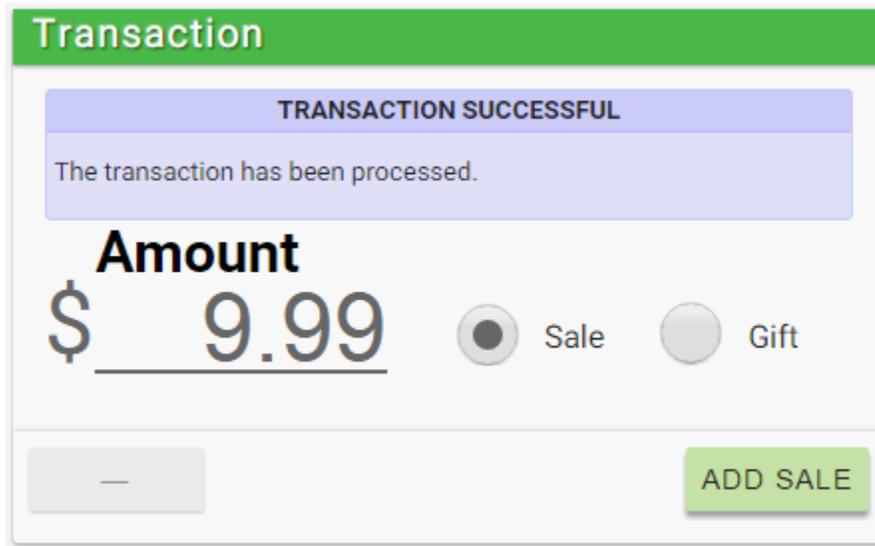
The screenshot shows a mobile application interface for redeeming rewards. At the top, a green header reads "Transaction". Below this, the word "Amount" is displayed in large, bold black text. To its left is a dollar sign (\$) and to its right is the amount "9.99" with a horizontal line underneath. To the right of the amount are two radio buttons: the first is selected and labeled "Sale", and the second is unselected and labeled "Gift". Below the amount section is a yellow box with the heading "REDEEMING". Inside this box, the text reads "Enjoy 20% OFF Your next order of \$20 or more Offers may not be combined." Below this text, it says "Expires: 3/21/2015" on the left and "Promo: 283" on the right. Below the yellow box is a white area containing a minus sign button on the left and an "ADD SALE" button on the right. At the bottom of the screen, another green header reads "1 Reward Available". Below this header is a large, empty white rectangular area with a vertical scrollbar on the right side, indicating a list of rewards that is currently empty.

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*If a reward is mistakenly selected, tap the yellow REDEEMING box to de-select the reward.*

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After clicking the ADD SALE button, a message will be shown indicating the success or error message.



If the transaction is successful, the message will disappear after a short time and the screen will go back to the Search window.

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*If the transaction is not successful, the Transaction Screen will remain to correct the issue.*

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To go back to the Search Screen, click  at the top of the screen.