POINT OF MARKETING®
CERTIFIED

User Guide

Point Of Marketing® Online

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

Contents

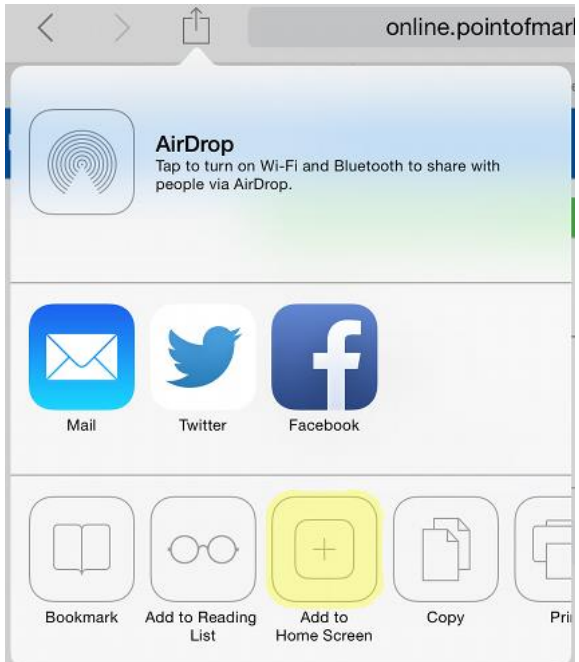
Login, Installation & Configuration

Login

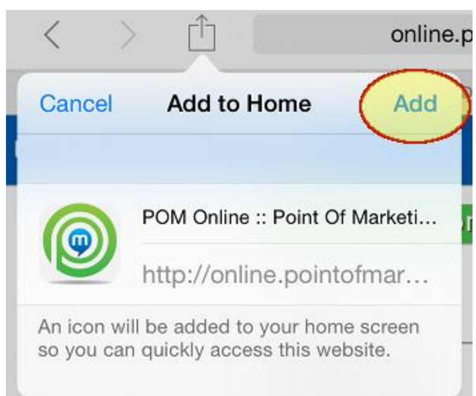
To login, visit http://online.pointofmarketing.net/ and enter the credentials provided by your representative.

Installation

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



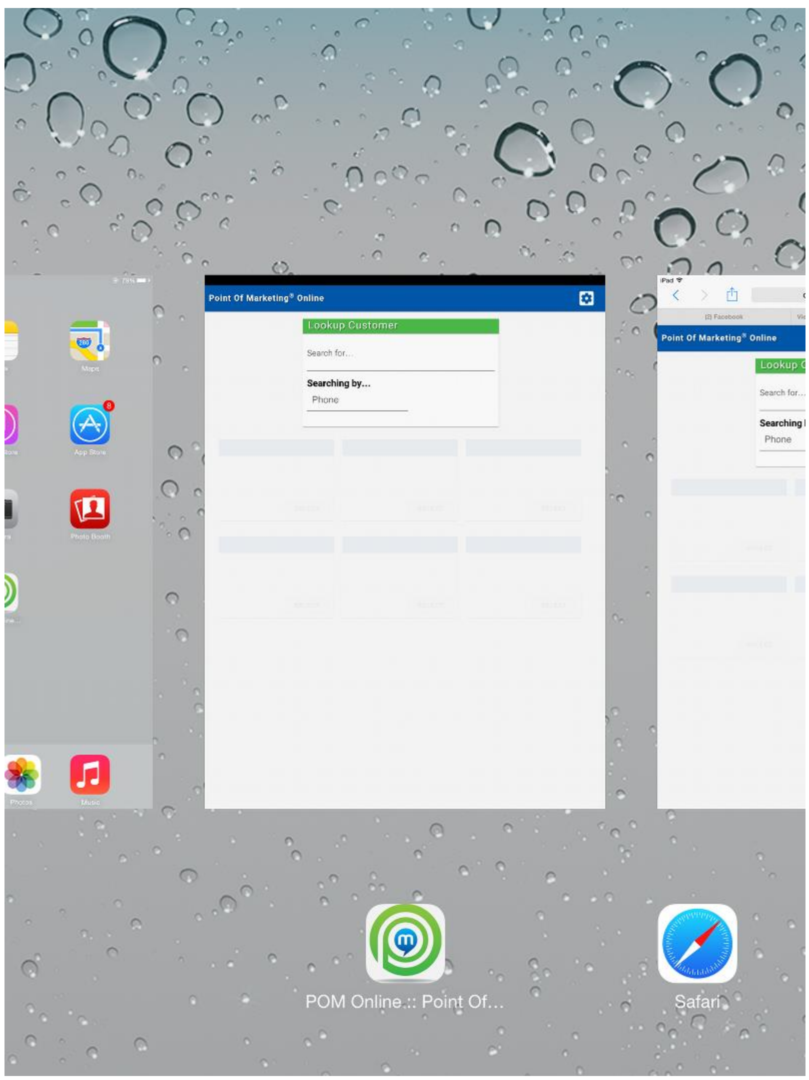
Click Add in the upper right of the displayed prompt:



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:



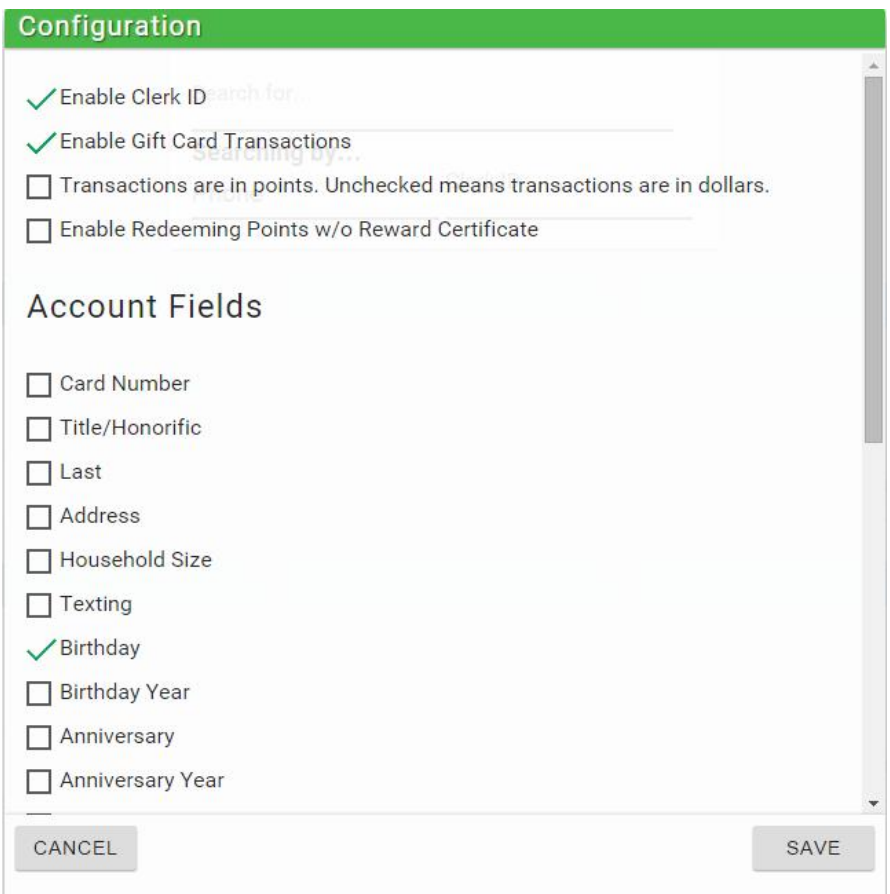
Configuration

Setup your account by clicking the white 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:

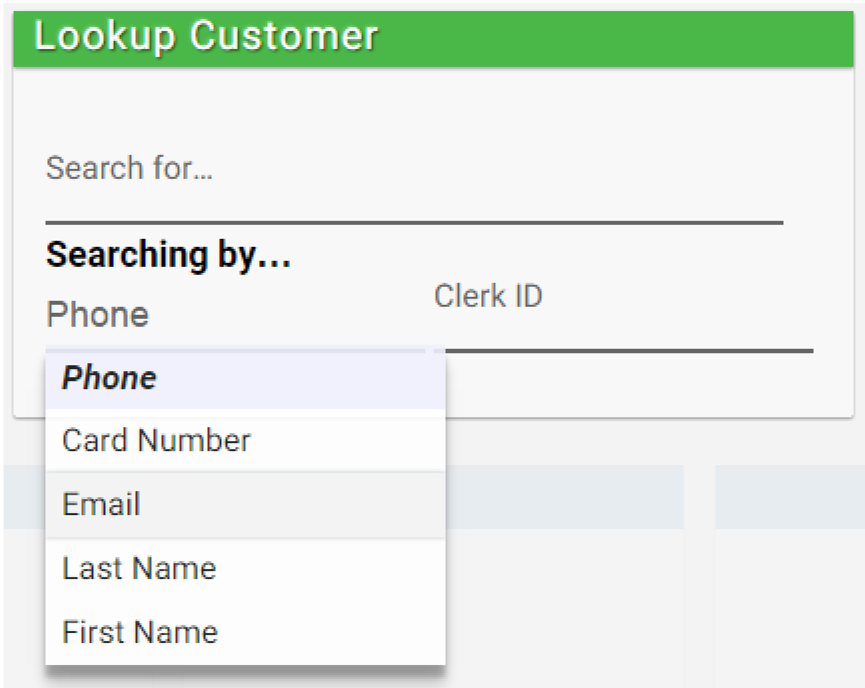
1. **Enable Clerk ID**
   If your program requires Clerk ID numbers (highly recommended), check this box.
2. **Enable Gift Card Transactions**
   If your program includes Gift Cards, check this box.
3. **Transactions are in points. Unchecked means transactions are in dollars.**
   If your program only 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:

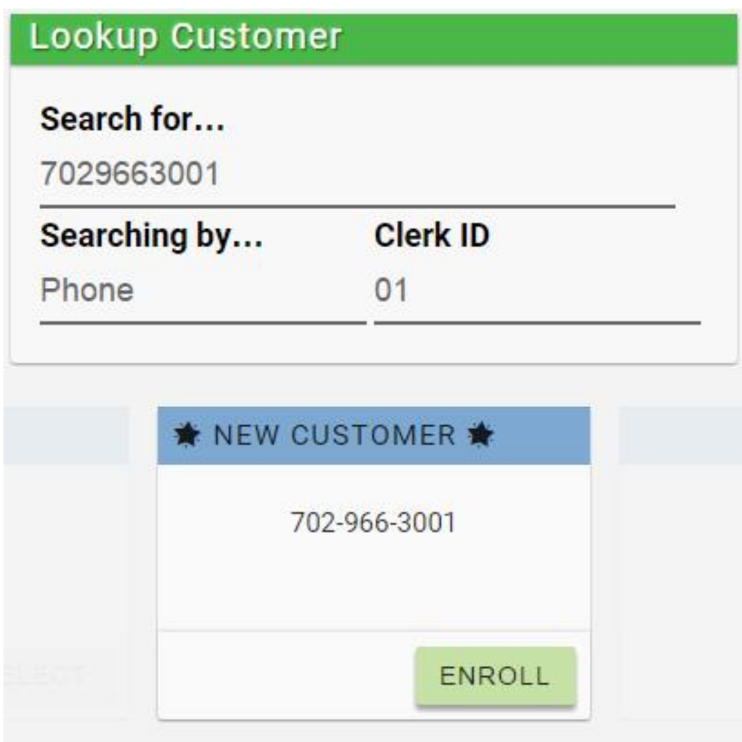


Enrolling A Customer

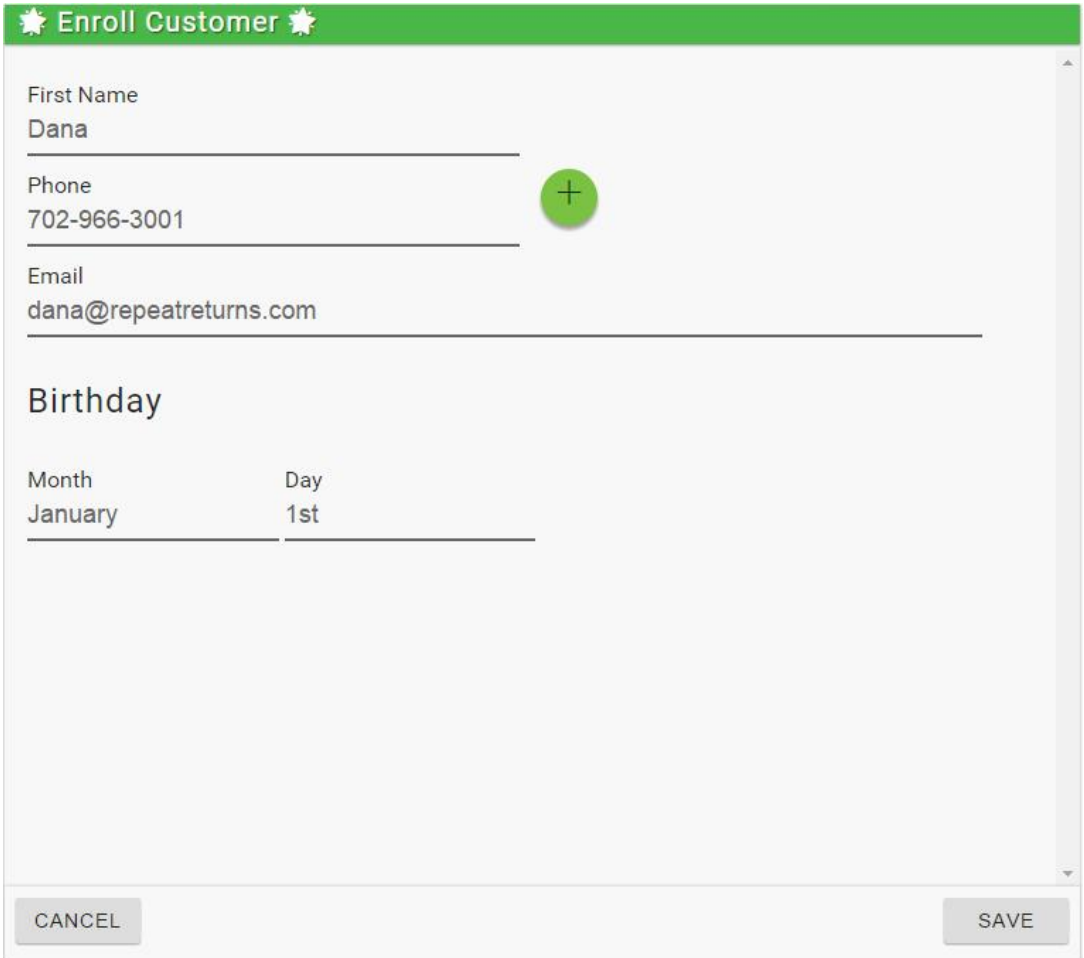
After saving your configuration, you will be presented with a Lookup Customer screen. Tap the Phone title.

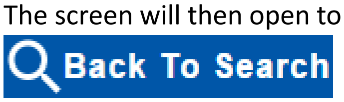


Enter the phone number for the customer you wish to enroll, then click Enroll.

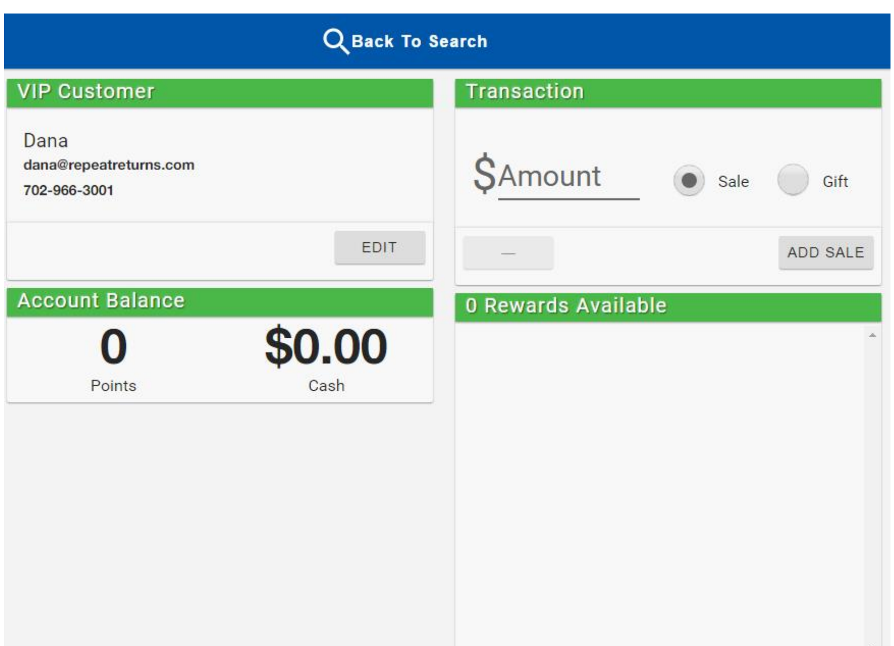


Fill in the customers information and hit Save.



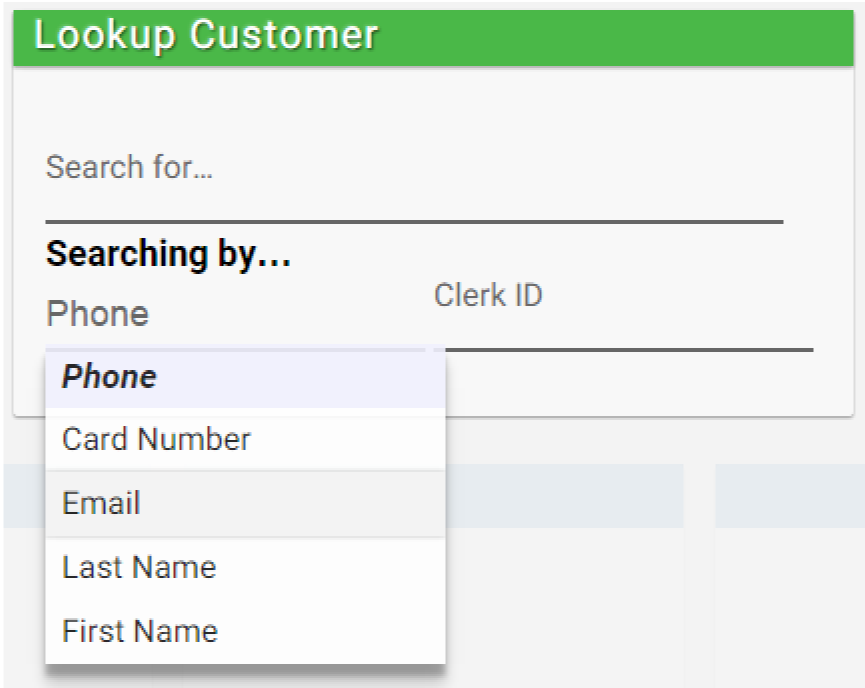
The screen will then open to allow for entering a transaction. If no transaction is being entered you can hit 

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

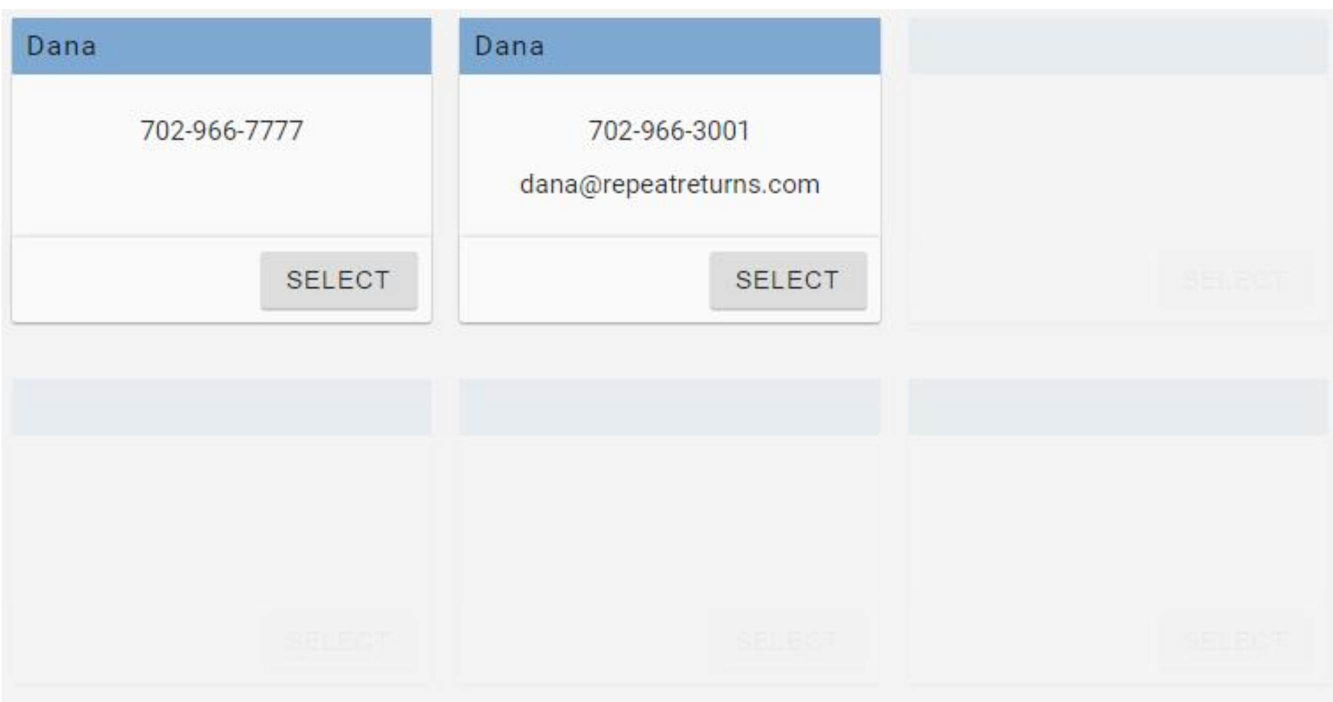


Editing A Customer’s Information

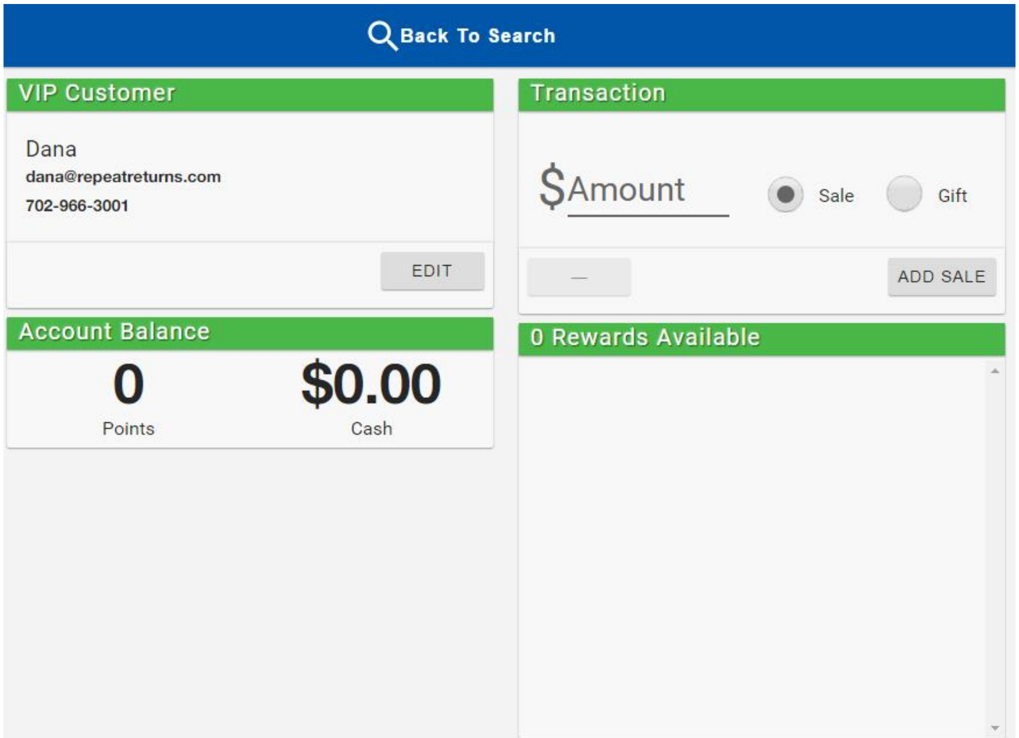
Search for the customer.



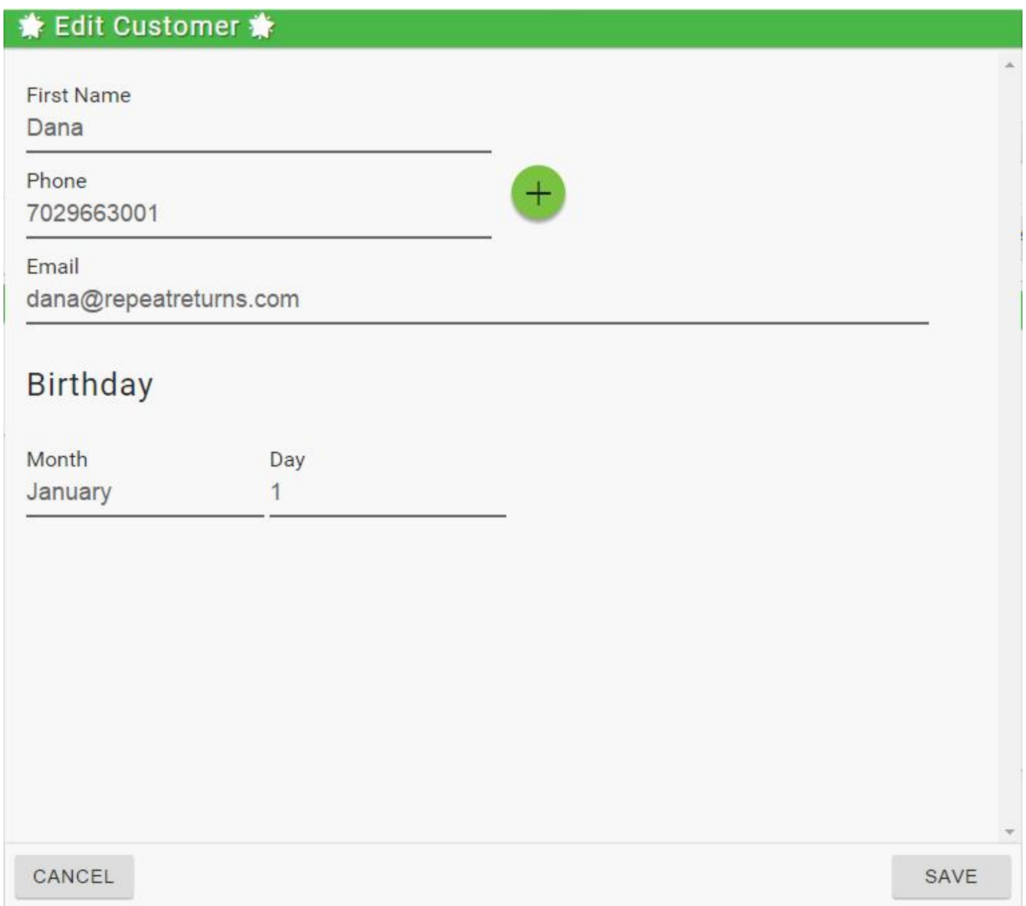
As you search, the most likely results are shown in boxes:



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.



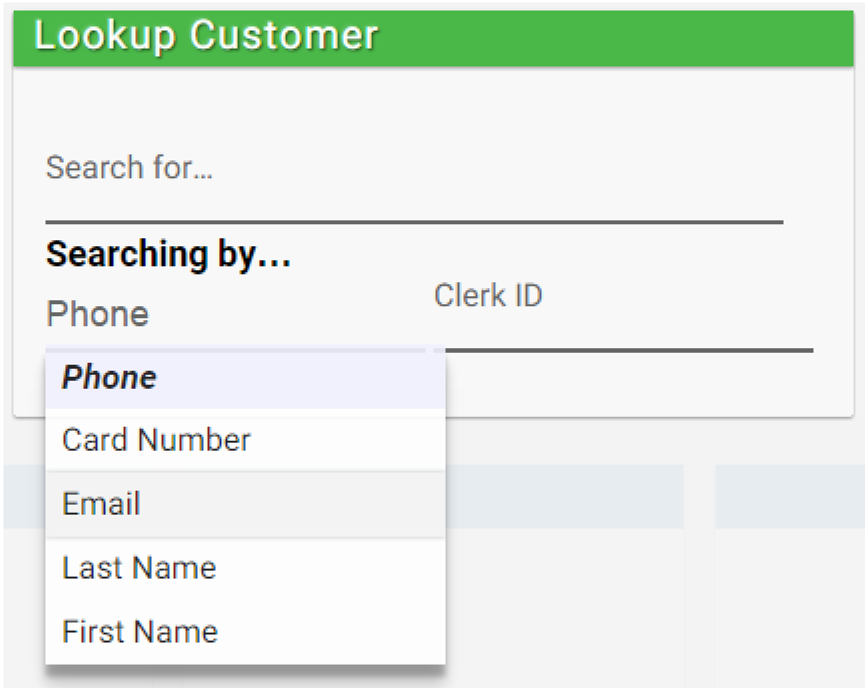
Make any necessary changes the hit Save.



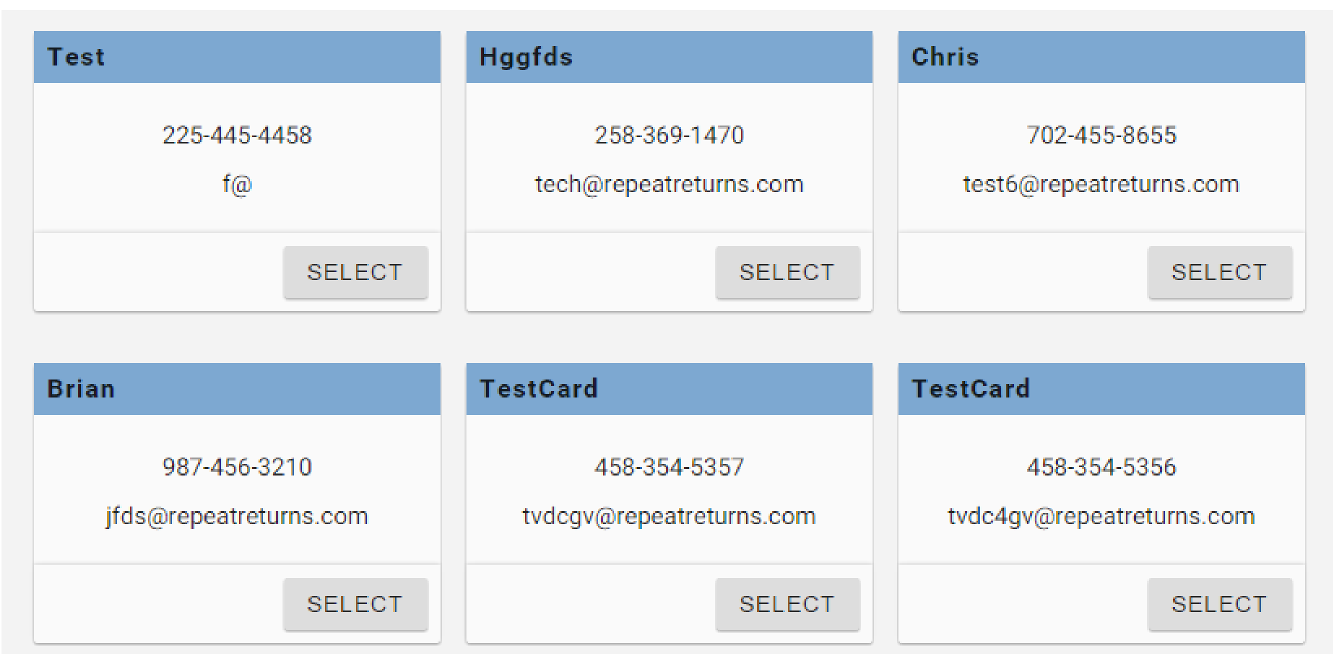
Entering Transactions

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:

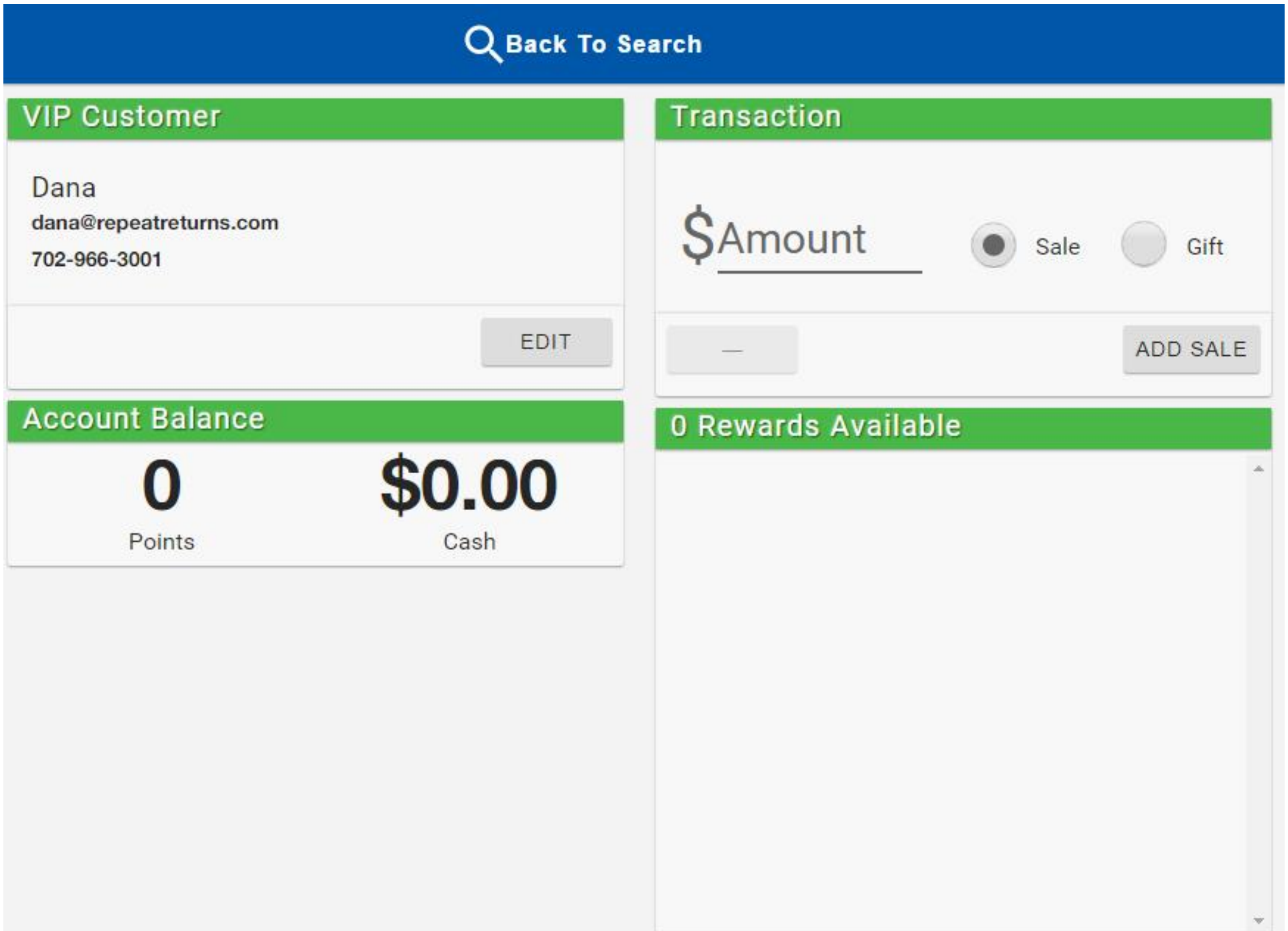


Tap the Select button when enough information has been entered to find your customer.

Transaction Screen

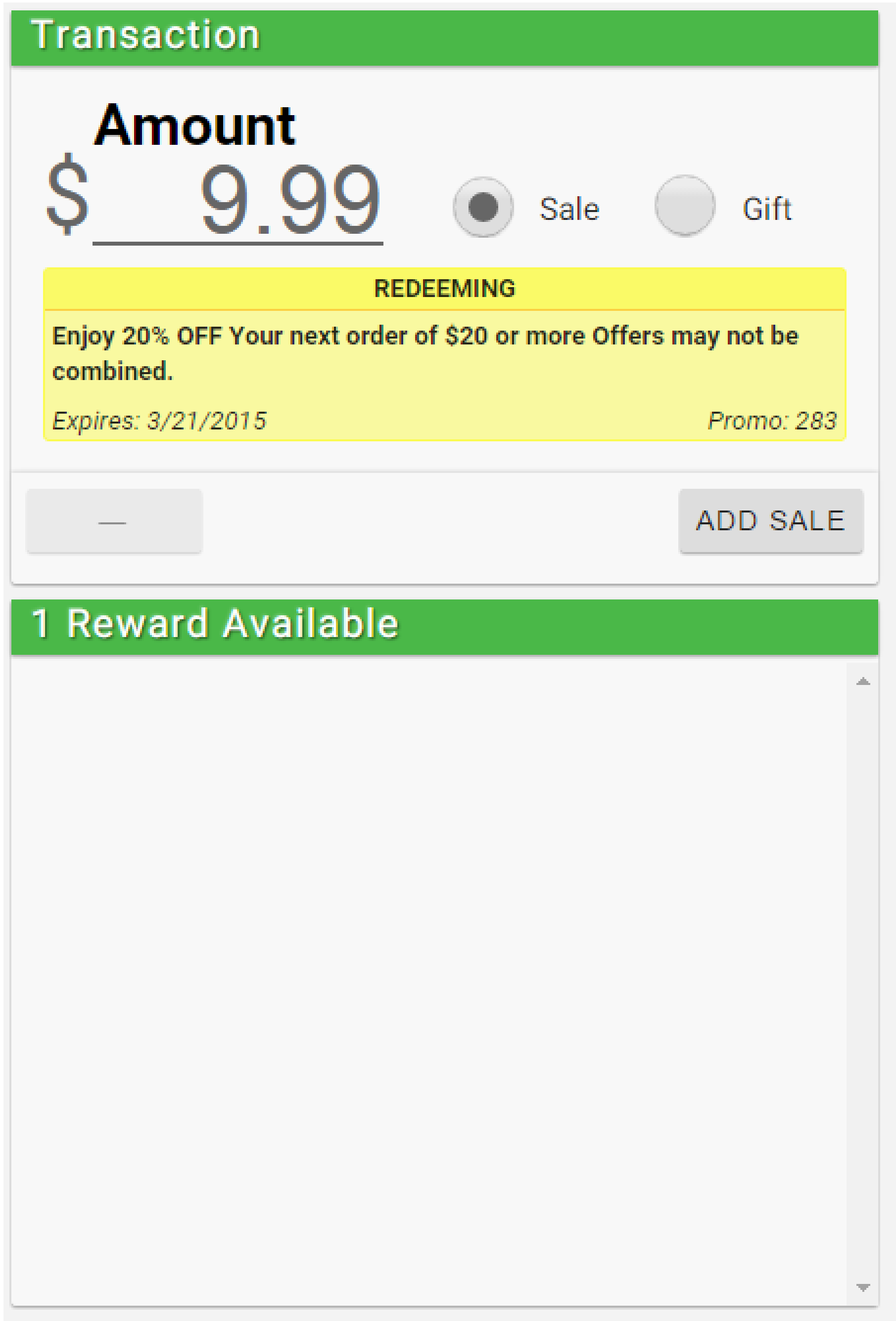
The Transaction Screen is divided into 4 areas. In the left column, the customer's information, current points, and total gift card value are displayed.

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.



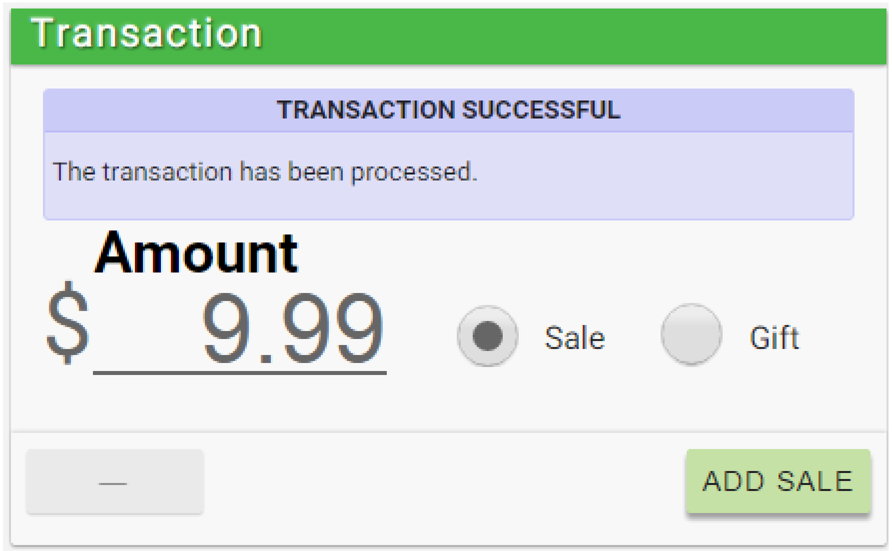
Redeeming Rewards

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.



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

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.

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

To go back to the Search Screen, click 

at the top of the screen.
