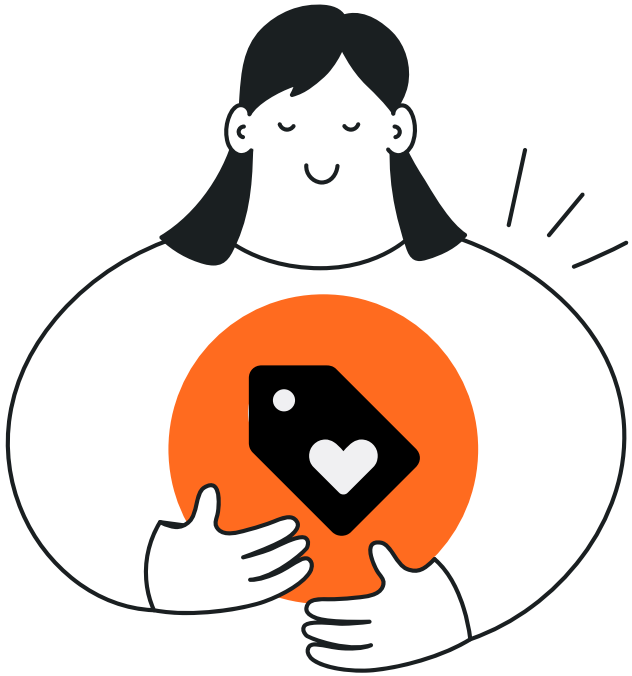
Payanywhere Loyalty.



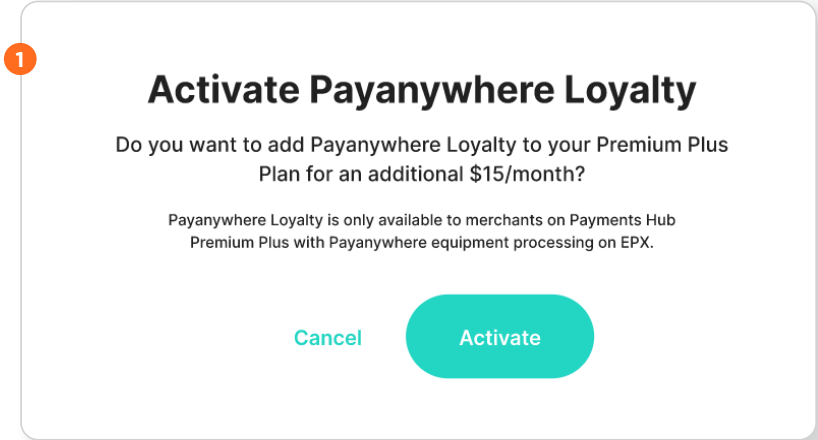
How to build and manage your customer loyalty program.

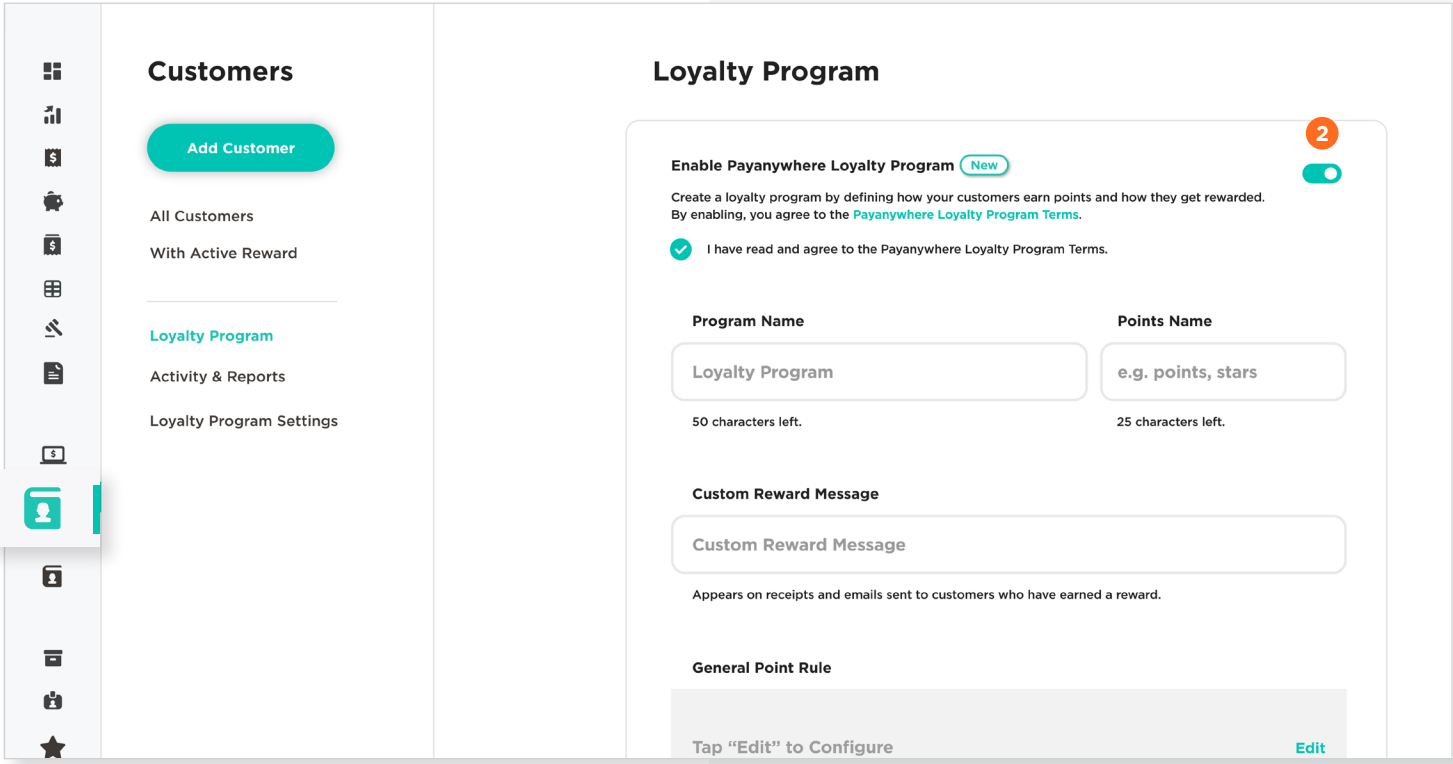
Payanywhere Loyalty is available at an additional cost to merchants on Payments Hub Premium Plus with Payanywhere equipment processing on EPX.

Version 3/24

Setting up your loyalty program.

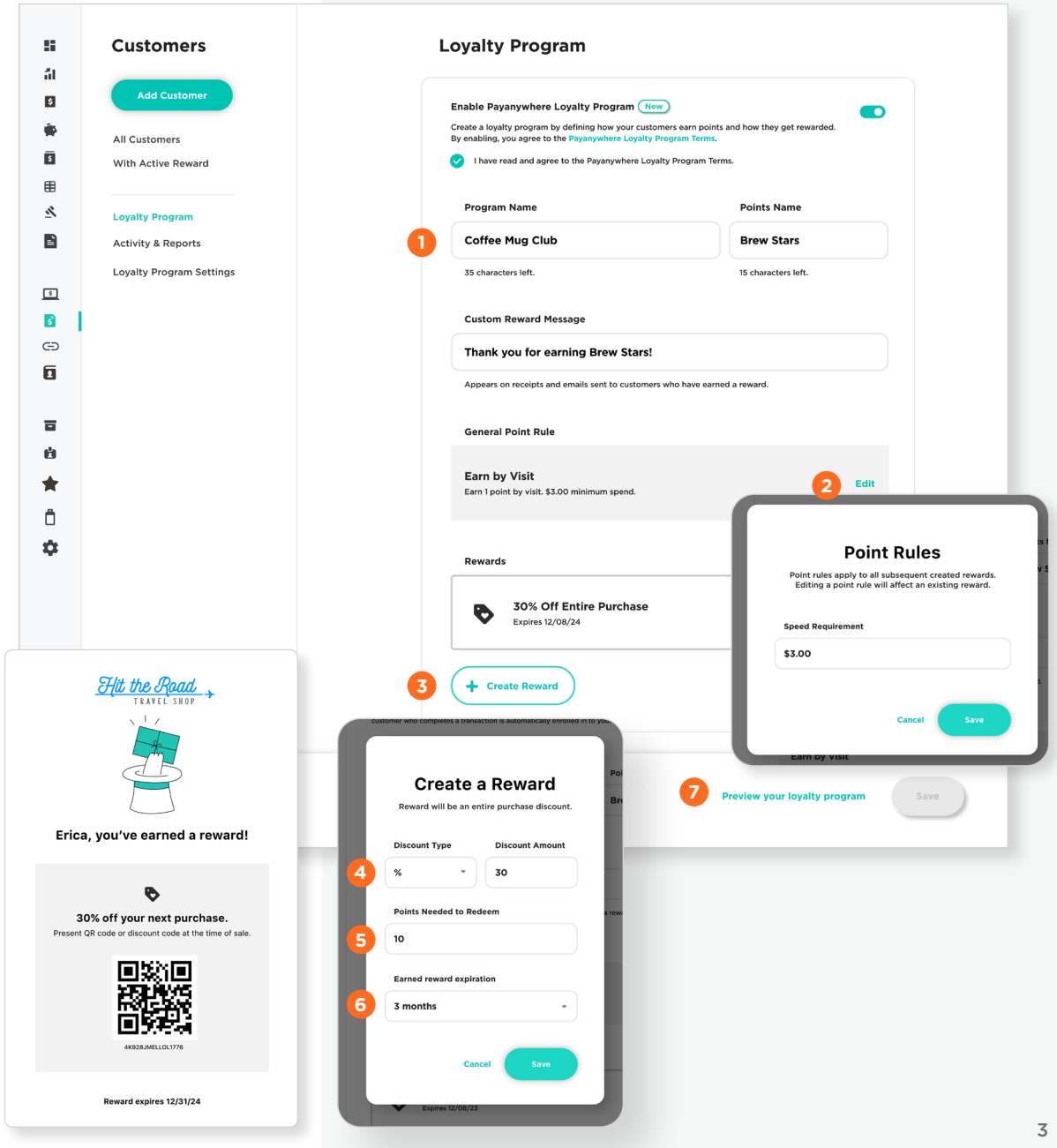
1. Payanywhere Loyalty is only available to Payanywhere merchants on the Payments Hub Premium Plus plan.
   - Activate the Payanywhere Loyalty add-on (additional fees apply) under **User Settings**.
2. Enable the Payanywhere Loyalty Program in Payments Hub under **Customers** → Loyalty Program.
   - I have read and agree to the Payanywhere Loyalty Program Terms must be checked in order for customers to begin earning points.
   - Only Owners and Admins can enable and modify Loyalty settings.
   - Once enabled, Loyalty is view only for Managers.





Setting up your loyalty program.

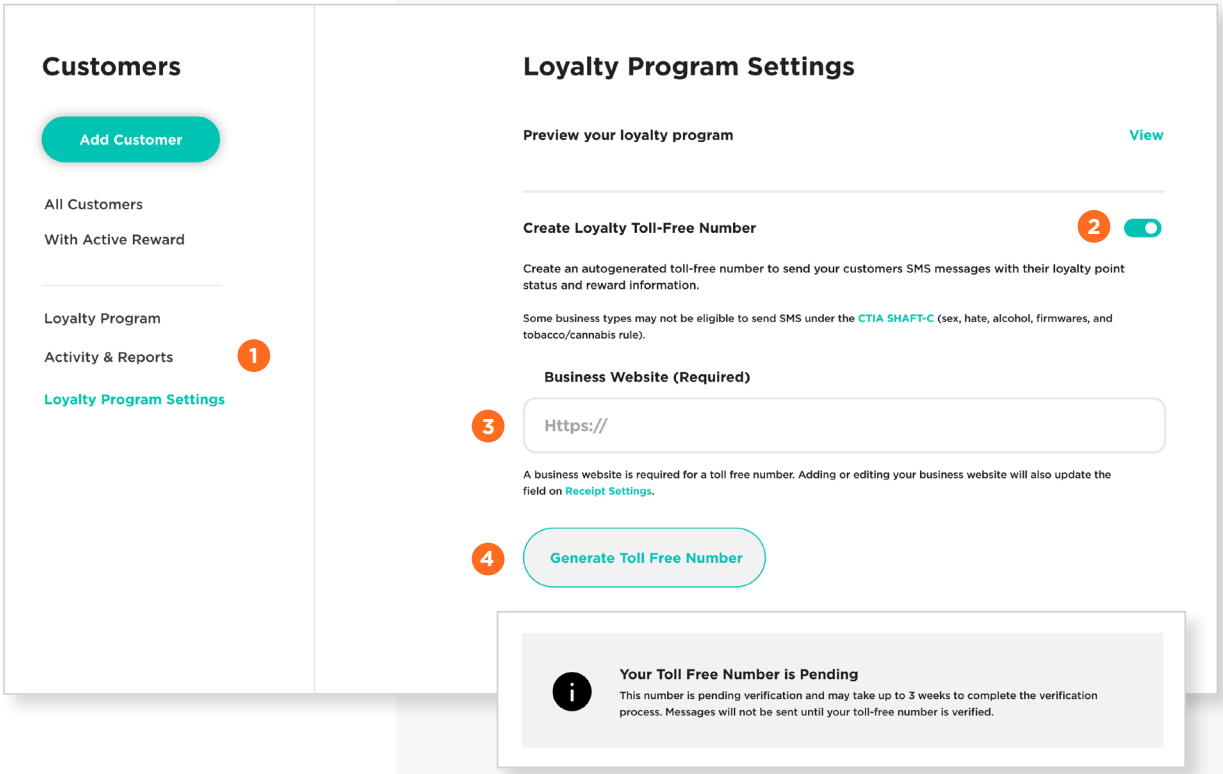
1. Optional: Enter names for your loyalty program and points
   - Example: Coffee Mug Club and Brew Stars.
2. Click Edit under General Point Rule to add a minimum spend amount needed to earn a point.
   - Customers must spend the minimum amount or more in order to receive a point for that transaction/visit.
3. Click Create Reward to set your reward details.
4. Enter the reward amount by percentage or dollar amount.
   - The discount is applied to the total purchase amount at the time of sale.
5. Set the number of points needed to earn a reward.
6. Optional: Add an expiration date for the reward.
   - If your customer does not redeem their reward by the expiration date, it is no longer valid.
7. Click Save when finished.
   - Click Preview your loyalty program to see examples of your Receipt with Reward and Rewards Email.

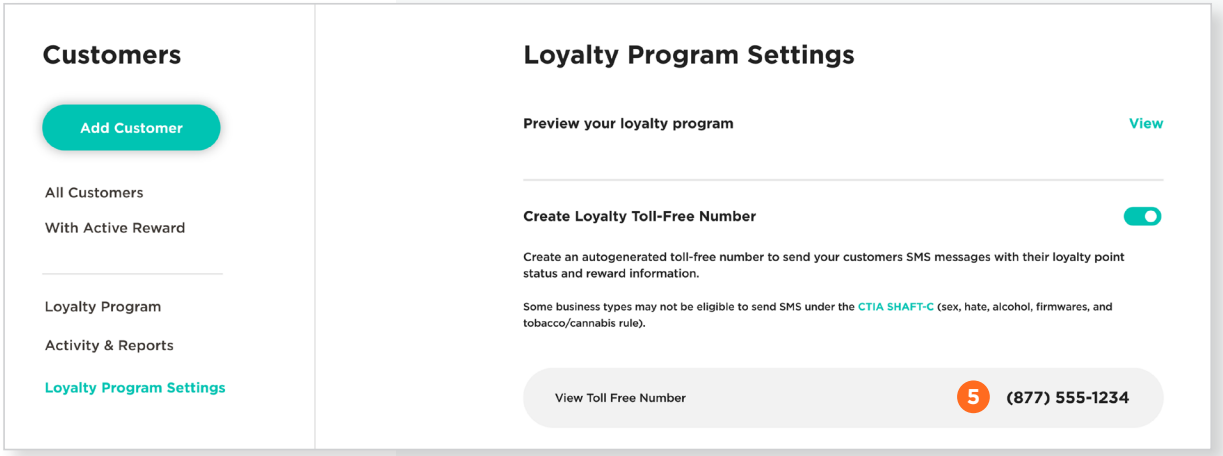


Setting up your loyalty program.

Optional: Create your own autogenerated toll-free number to send customers SMS messages with their loyalty point status and reward information.

1. Click Loyalty Program Settings under the Customers submenu.
2. Toggle on Create Loyalty Toll-Free Number.
3. Required: Enter the URL for your business website.
   - Note: Some business types may not be eligible to send SMS under the CTIA SHAFT-C (sex, hate, alcohol, firmwares, and tobacco/cannabis rule).
4. Click Generate Toll Free Number.
   - The toll-free number may take up to 3 weeks to be approved and assigned.
5. Once assigned, this is the number from which your customers would receive loyalty related text messages.





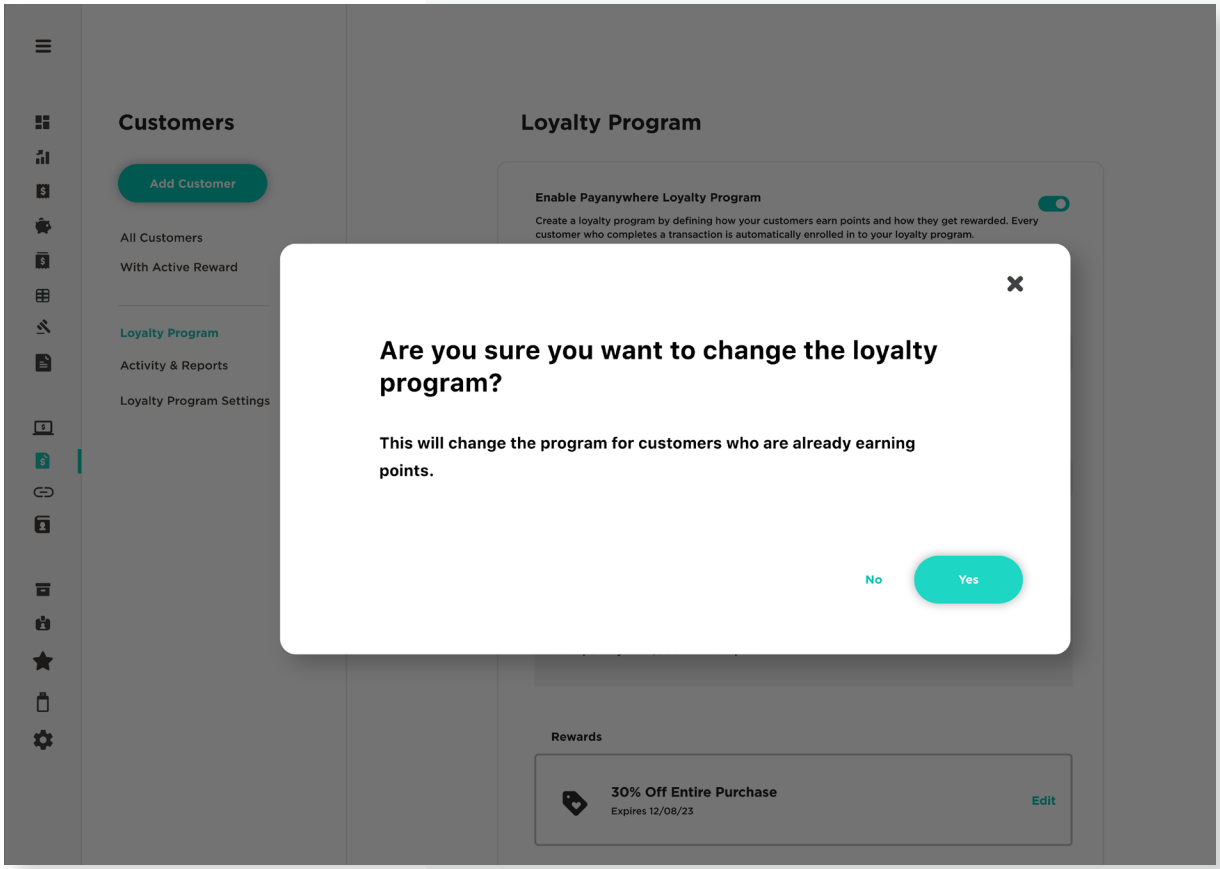
Modifying your loyalty program.

You may modify your Loyalty settings at any time. Please note that changes to the number of points needed to earn a reward will affect customers who are already earning points.

- Customers keep their existing points, but will have to reach the new threshold to earn their reward.
- If the threshold of points to earn decreases, customers with an existing point total that meets or exceeds the new threshold will automatically earn their reward upon their next purchase.
- If an existing reward is already earned, customers will keep that reward unless it has met its expiration date.

Disabling your loyalty program.

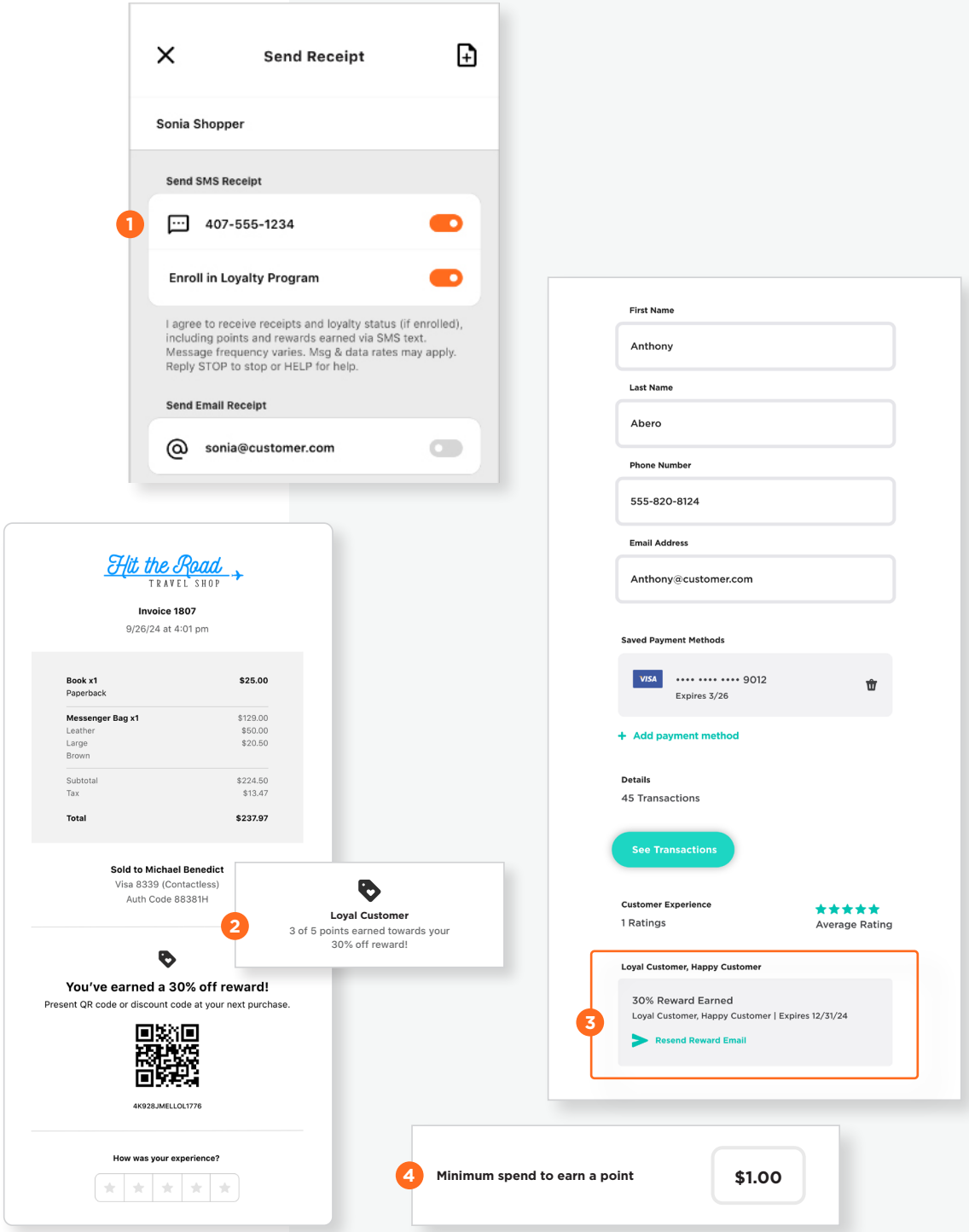
- Customers keep their existing points and rewards, but will not earn new points.
- Disabling your loyalty program does not downgrade your Payments Hub plan. If you would like to remove Payanywhere Loyalty from your plan, you will need to deactivate it under User Settings.



How it works.

Once your Loyalty program is activated, customers can enroll and begin earning points for all of their qualifying transactions, including invoices and Virtual Terminal transactions.

1. Customers can choose to enroll in your Loyalty program on the receipt options screen.
   - A phone number or email address is required in order to enroll.
2. Reward and point totals are displayed on receipts.
3. Reward and point totals are also tracked in customer profiles. If needed, you have the option to resend reward notifications from customer profiles.
4. If you have a minimum spend amount, customers will only earn points for transactions that meet or exceed the minimum spend amount.



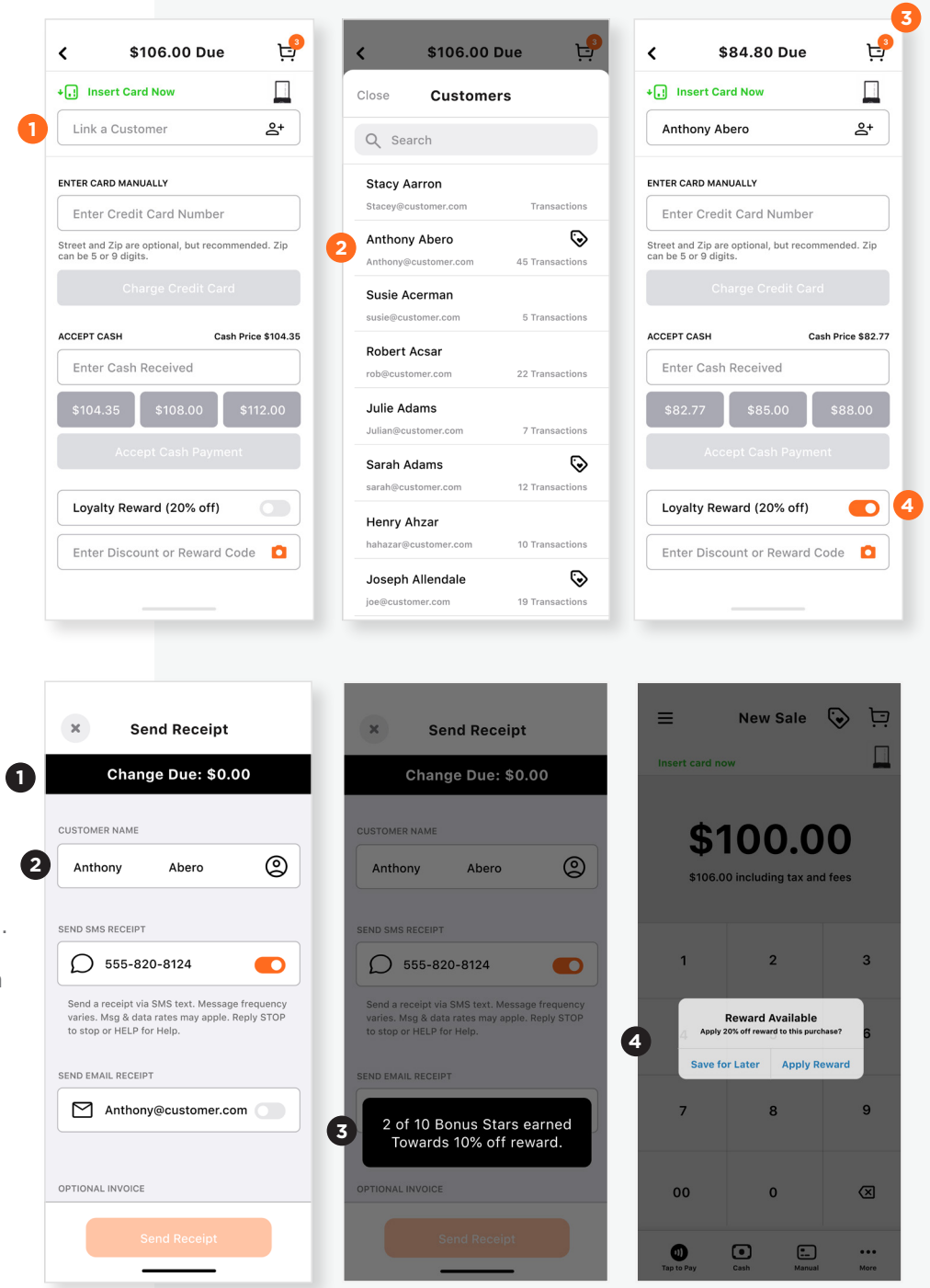
How it works.

Linking a customer to a transaction (Retail theme only):

1. Prior to completing a transaction, tap Link a Customer on the payment screen.
2. Search or scroll through your customer list to locate and select a customer.
3. The qualifying transaction automatically earns a point/reward for the linked customer regardless of the payment method used.
4. If the linked customer has an active reward, the reward can be optionally applied to the sale without needing to enter the reward code.
    - Note: This also applies to invoices (Customer Payment Portal) and Virtual Terminal transactions.

Earning points and rewards by card without linking a customer before or after the sale:

1. Customer pays with a credit or debit card.
2. The customer is now logged and recognized by the card they used.
3. Any qualifying transactions paid by that card automatically earns a point/reward for the customer.
4. If the customer has an active reward upon payment with the card, a prompt will appear that an award is available with the options to apply it or save for later.
    - If applied to the current sale, the sale price is deducted by the reward.
    - If saved for later, the reward will be prompted again during the next sale.

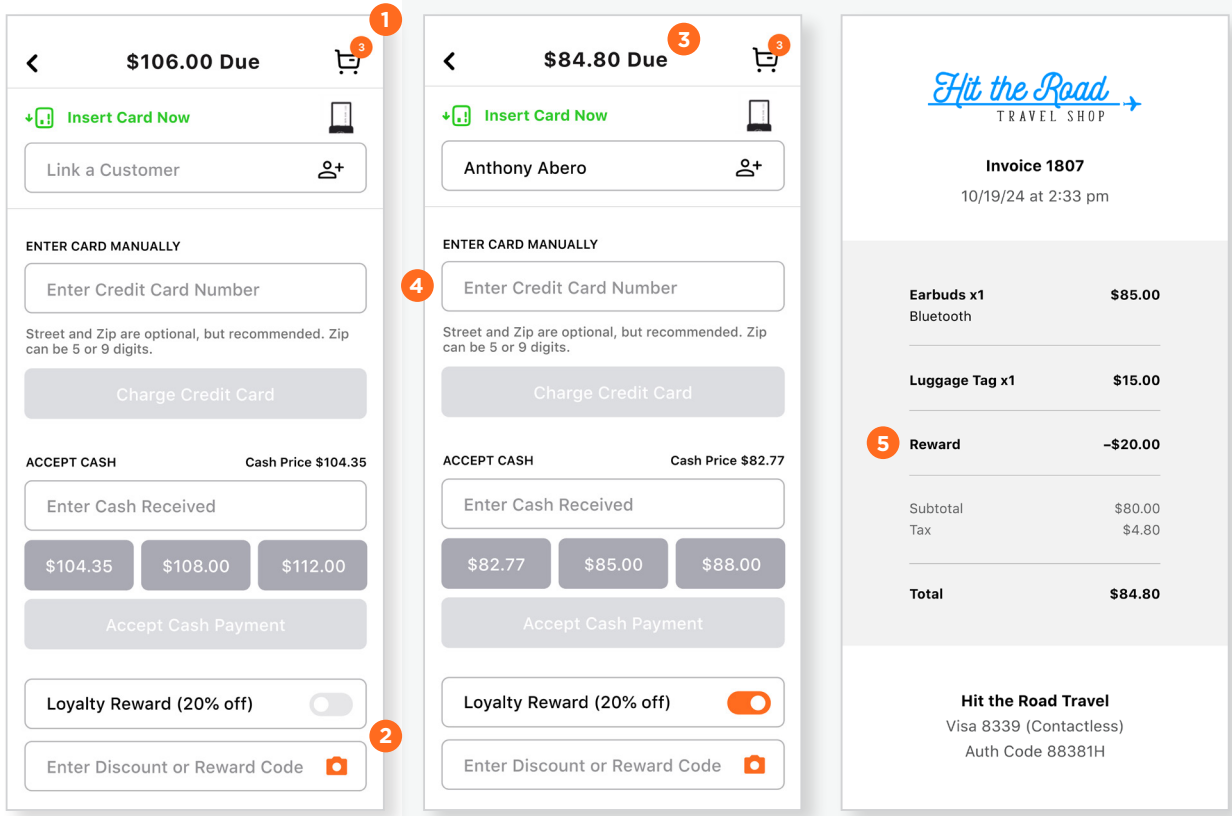


Redeeming a reward.

- Customers must redeem their reward before they can begin accumulating points towards their next reward.
- If a customer does not redeem their reward prior to your expiration date (optional), the reward code is no longer valid.

To redeem a reward in the Payanywhere app:

1. Add items to the cart and proceed to checkout.
2. Scan or enter the reward code in the field provided under the list of payment options.
   - Retail theme only: Linking a customer with an active reward will optionally apply the reward on the payment screen as well.
3. The reward is added as a cart discount and the sale amount will automatically update to reflect the reward amount.
4. Select the payment method and complete the transaction.
5. The reward will also be listed on the receipt as a cart item.



Redeeming a reward.

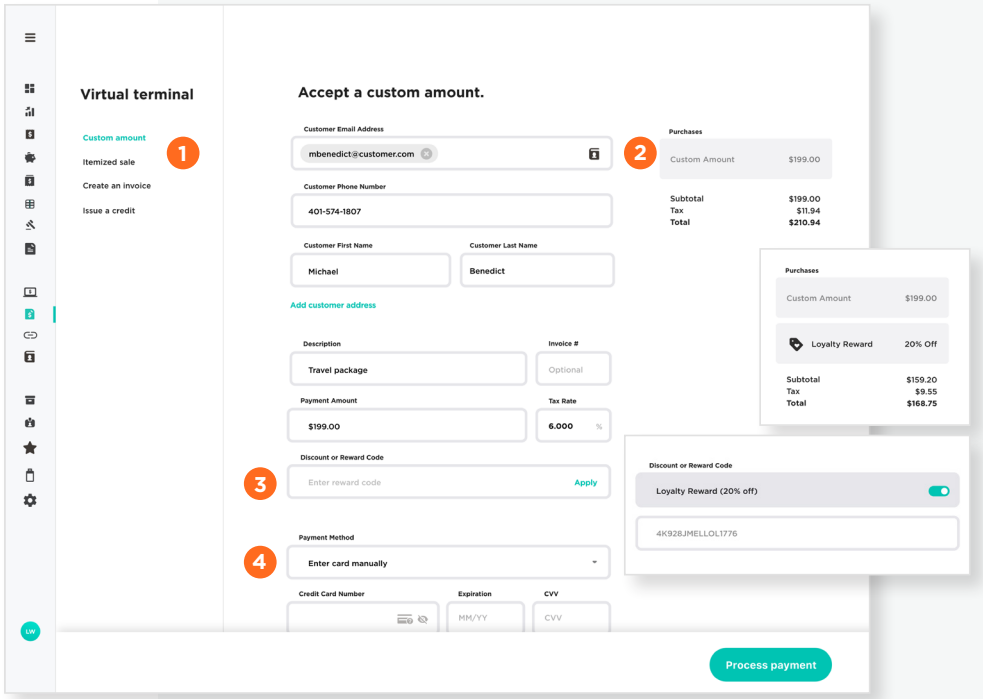
Rewards can also be applied to invoices and Virtual Terminal transactions in Payments Hub.

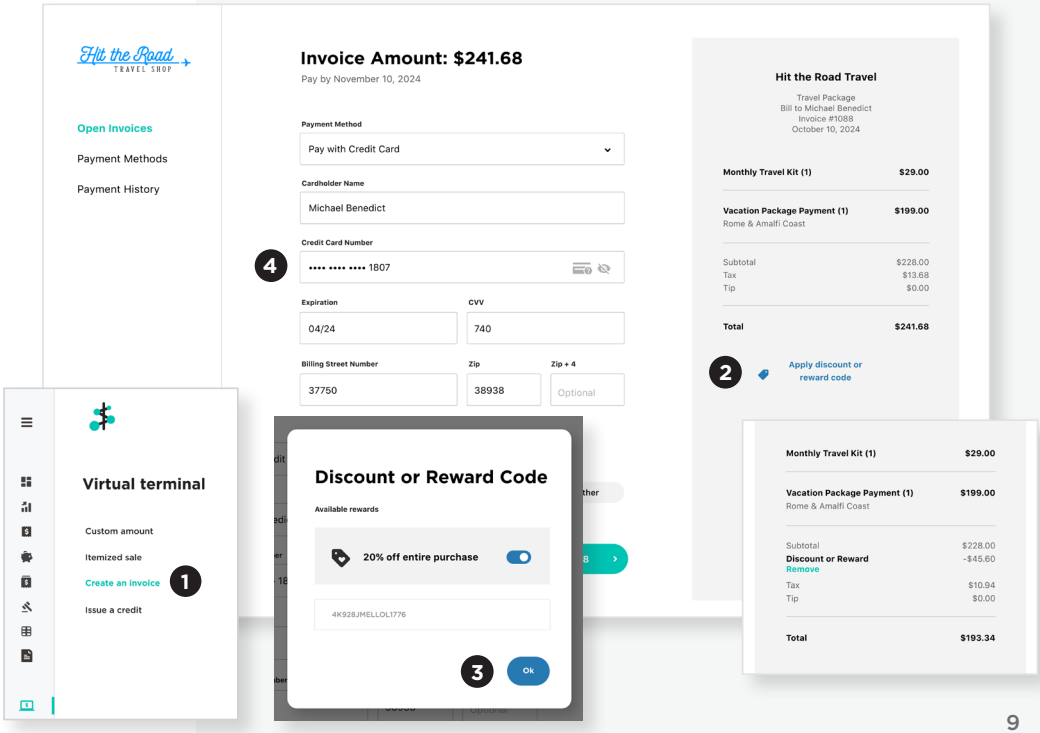
Virtual Terminal:

1. Select Custom Amount or Itemized Sale in the Virtual Terminal.
2. Enter an amount or add items to the cart.
3. Enter the reward code in the designated field.
   - If the linked customer has an active reward, the reward can be optionally applied to the sale without needing to enter the reward code.
   - The sale amount will automatically update to reflect the reward amount.
4. Fill in any remaining details and enter the credit card information to complete the transaction.

Invoices:

1. Create a custom amount or itemized invoice.
2. Enter the reward code in the designated field. Customers may also enter the code when submitting their payment.
   - If the linked customer has an active reward, the reward can be optionally applied to the sale without needing to enter the reward code.
   - The sale amount will automatically update to reflect the reward amount.
3. When your customer opens the invoice in their payment portal, they will also have the option to apply or remove the reward.
4. Your customer will then enter their credit card information and submit their payment.





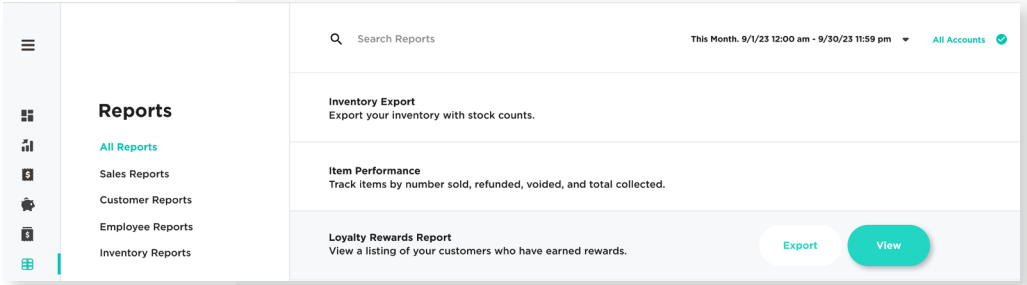
Loyalty reporting.

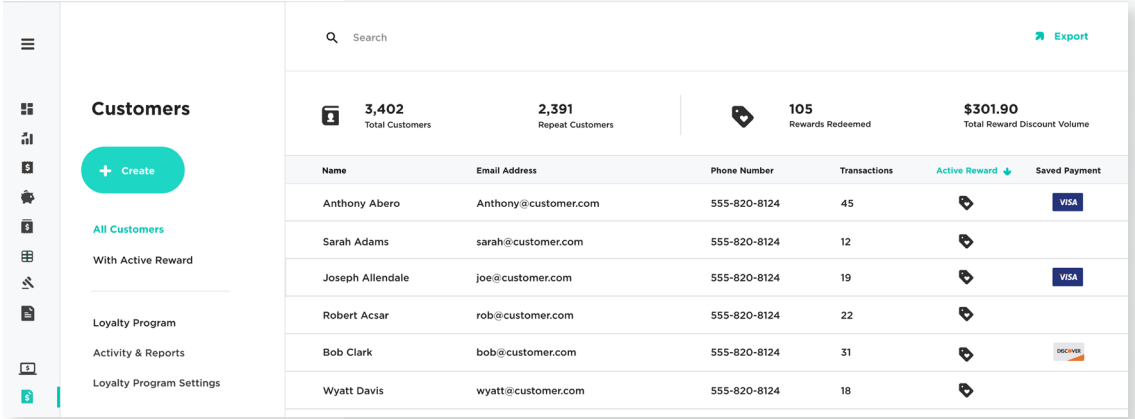
Loyalty Rewards Report — This is added to your Reports page and allows you to view and export a list of all customers that have earned rewards, and when the rewards were redeemed.

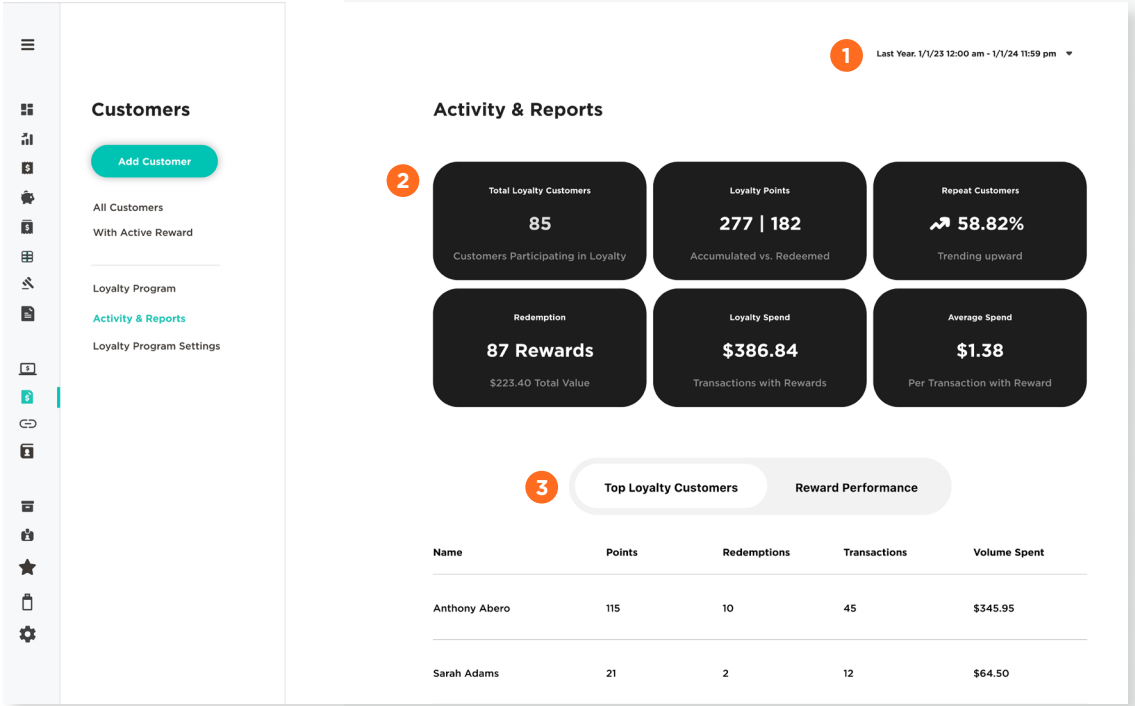
Customers — Your customer list provides a high level overview of loyalty activity, such as customers with an active reward, number of rewards redeemed, and total reward discount volume.

Activity & Reports — view detailed insights about your loyalty program.

1. Use the date range dropdown to display data for a specific time frame.
2. Your dashboard includes a summary of loyalty stats, such as total loyalty customers, loyalty points accumulated, and reward redemptions.
3. Use the toggle to see a list of your top loyalty customers or check your reward performance.





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