

# *Web Allegiance* *Training Manual*



Thank you for choosing to use ProfitPoint's Web Allegiance software. This manual is designed to teach you how to use the software to perform daily functions.

Please contact your account manager if you have additional questions.

## *Getting Started*



Web Allegiance is a virtual terminal used to process gift/loyalty transactions online. W/A works the same as a normal terminal only this one is online and usually much quicker. To get started, below you will find the proper website, the test logins, and the test card.

Website: [www.wa.rewardforloyalty.com](http://www.wa.rewardforloyalty.com)

Client ID: DMARK

Login: admin

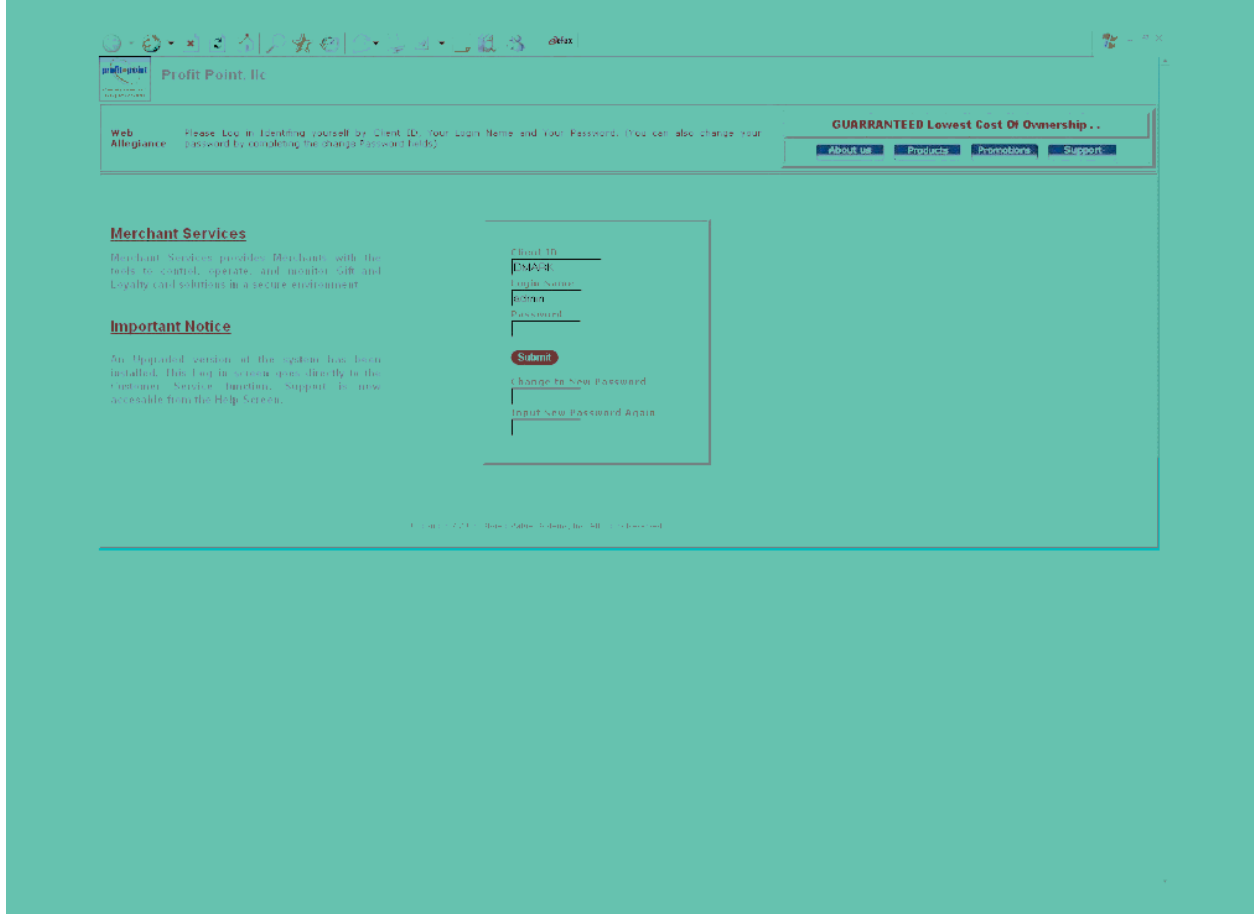
Password: admin

Test Card: 1999999999007044

You will use the above information for logging on and training on the Web Allegiance virtual terminal. Remember, this is just a test terminal and is not able to process your individual gift/loyalty cards and the test card holds no real value.



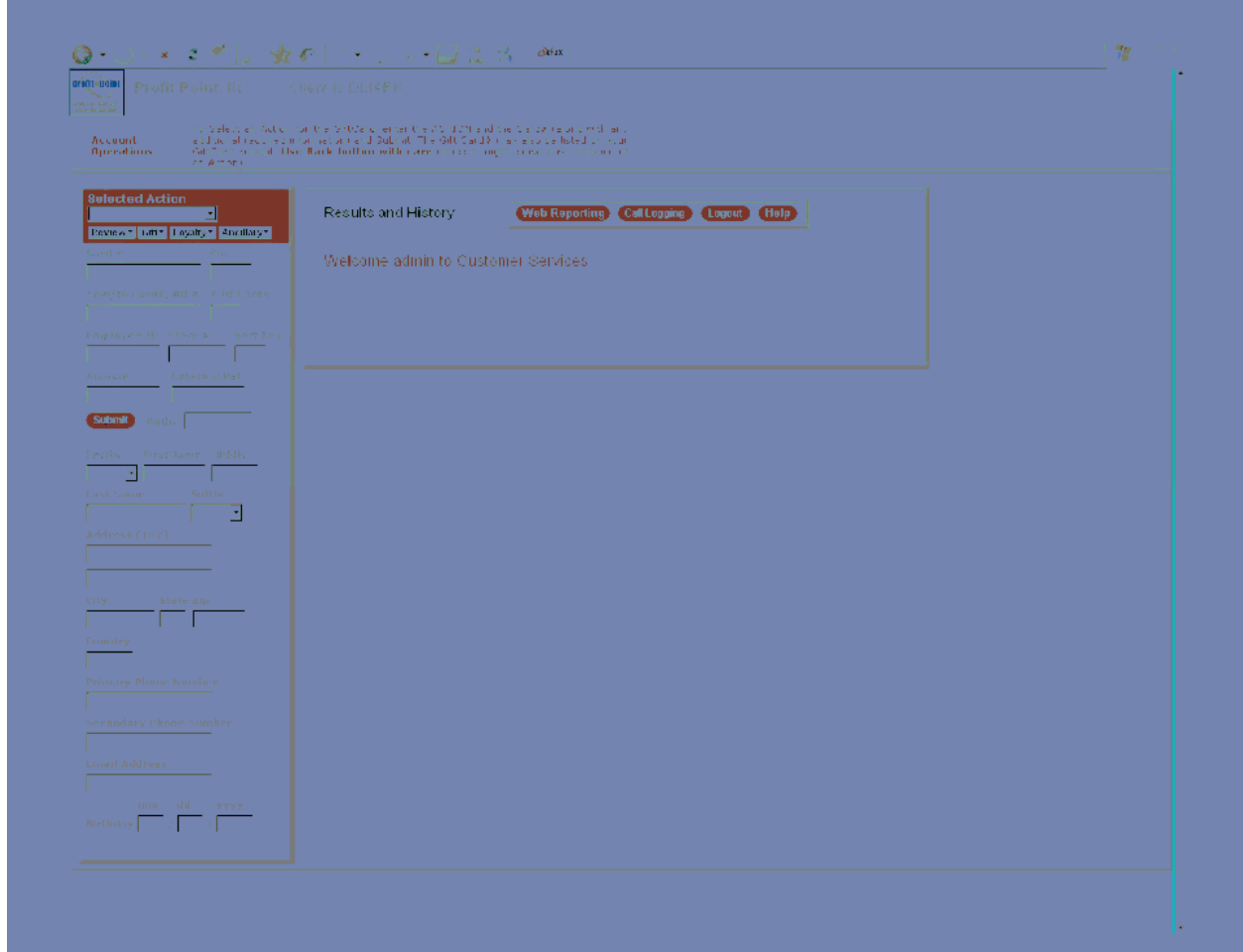
Figure 1 Sign on Screen



The Sign on screen is the first screen presented to the user. This screen permits the user access to the functions available based on the client ID and login name supplied. The user must also enter a password (which is not displayed) as a secondary verification of the user. The user can also use this screen to change their own password. The new password must be entered twice since characters entered are not displayed. The client ID, login, and password are case sensitive (i.e. small a is not the same as capital A).



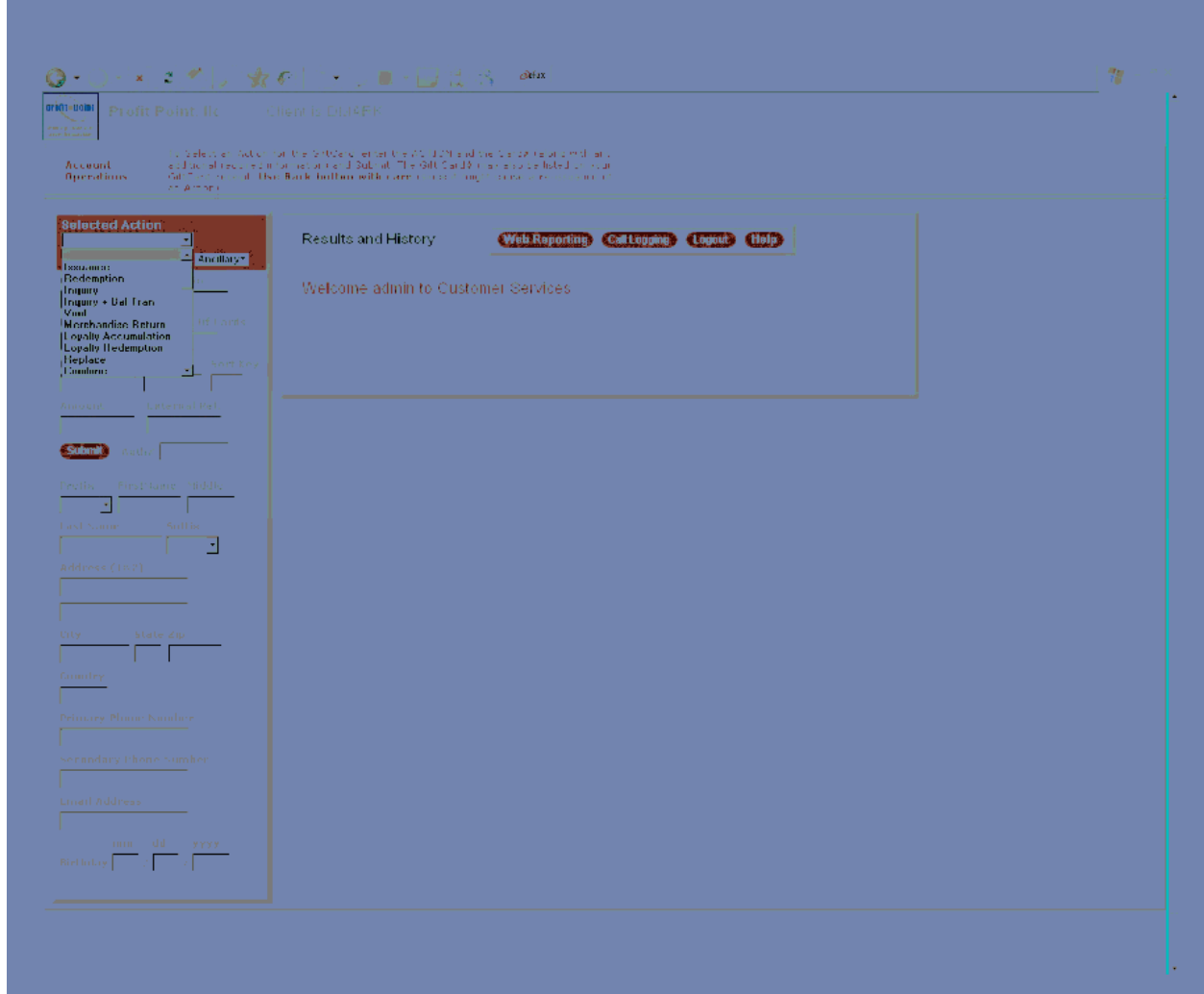
Figure 2 – List of Function (part 1)



Once the user has logged in they will be able to perform any of the actions displayed in the Action drop down located in the red box in the upper left. Only actions approved for that user/client will be displayed. The operation of the action is described in another section of this document. The user should select the desired action and then supply the information required for that particular action.



Figure 2 – List of Function (part 2) Figure 3 – Main operational Screen



The main operational part of the screen contains the fields used to supply the usual required information. The card # box is for the card number currently in action. The sort key will accept up to 2 characters which are stored with the actions and can be used in reports for organizing data. The New Account is used when doing a replace or combine operation. Sales Associate# is used to supply the employee ID of the store that has requested the action. Store# allows the user to associate a transaction with a specific store. Once all the information is added, the Submit button will request the action to be performed.



Figure 5 – On Line Help

Profit Point - Ilc Client is DM4RK

**Operation Description**  
This describes the fields, buttons and explains the actions that are permitted for the logged in user. Only those actions which have been assigned to the user are included. To return to the operational screen just click on the X in the top right hand corner of the screen.

**Operational Help**

**Support**  
Are you having problems with your service?  
Report them here.  
Send information that you need assistance with.  
Get free help online.

**Fields, Buttons and Actions Descriptions**

FIELD	Meaning of the Field
Selected Action Or Menu Drop Downs	Can Be used to select the function to be performed. Normally, the user would use the Drop Down Menu
# Of Cards	Defines the number of cards to be issued for a multiple Issuance function
Card #	The Account number having the action (some actions will use the last card # and will not require this field to be input) <b>NOTE!</b> Card number accepts a card swipe
Pin	The Pin associated with the Account. This is an optional field. Used for security of the Card Holder.
New/In Card# All #	Used for Multi Issuance Transfer/combine and for specifying an associated account for lookup and loyalty accumulation. <b>NOTE!</b> New Account number accepts a card swipe
Sort key	Client dependent - saved with transaction to allow reports to sort the data
Sales Assoc #	Designates the Employee at the store
Store #	Defines the store for whom the transaction is being performed. If no store defined Customer service is used as the store
Amount	Defines the value of the transaction
External Ref	A POS associated transaction number
Void Auth #	Specifies the Datamark Transaction # Used for either voiding or getting

If the get help information is requested then the system will present the above screen which will give a brief explanation of all the fields and actions (Only actions for which the user has permission to use will be described).





Figure 8 – Profile Information

**Selected Action:** Review | Edit | Loyalty | Ancillary

**Card #:** [ ] **PIN:** [ ]

**New/Old Card:** [ ] **Old Card:** [ ]

**Employee ID:** [ ] **Store #:** [ ] **Sort Key:** [ ]

**Account:** [ ] **Patron Ref.:** [ ]

**Submit** **Void Auth:** [ ]

**Prefix:** [ ] **First Name:** [ ] **Middle:** [ ]

**Last Name:** [ ] **Suffix:** [ ]

**Address (102):** [ ]

**City:** [ ] **State:** [ ] **Zip:** [ ]

**Country:** [ ]

**Primary Phone Number:** [ ]

**Secondary Phone Number:** [ ]

**Email Address:** [ ]

**Birthdate:** [ ] / [ ] / [ ]

**Results and History** **Web Reporting** **Call Logging** **Logout** **Help**

**PROFILE**

Account: 1021001000

**GIVER DEMOGRAPHICS**

MR. MARK S. MARKETI  
25 ENTERPRISE AVE  
10000  
OMAHA, NE 68111 USA  
Phone: (402) 590-4880  
Birthday: 2005-10-31

**USER DEMOGRAPHICS**

MR. MARK M. WELFIELD  
01 HARTFORD COURT  
APT. 1A  
ATLANTIC CITY, NJ 08401 USA  
Phone: (609) 383-8900  
Email: HELLO  
Birthday: 1964-08-15

**PREFERENCE RESPONSES**

01) When did you last visit Europe? -> 2014-12-19  
02) What is your estimated US\$ rating range? -> 40 to 60  
03) What are your favorite musical groups? -> The Who + The Police + Van Halen  
04) Anniversary -> 2009-04-01  
05) Challenge Question -> Mother's Maiden Name  
06) Challenge Answer -> Jones  
07) Where would you like all correspondence forwarded to? -> Home  
08) General Question for all FR&EE -> n/a/dog  
09) General multiple choice question for all groups -> Answer 1

**GENERAL INFORMATION**

Card Type: Credit Real Time  
Card Type: Gift  
Activate Date: 2004-05-04  
Enroll Date: 2002-10-11  
Test Card: No  
Min Balance: 0  
Issue Date: 2002-08-01  
Status: Active

The profile information details all the user and giver information associated with the account. Additionally, any answers to questions (preferences) associated with the account will also be presented. The status and other information such as issuance date are also supplied. Any of the demographic information can be changed by using the update user/giver profile actions. Any field entered as a blank will be cleared by that action.



Figure 9 – Preference Add or Update

**Account Preference Update**

**Preference Selection**

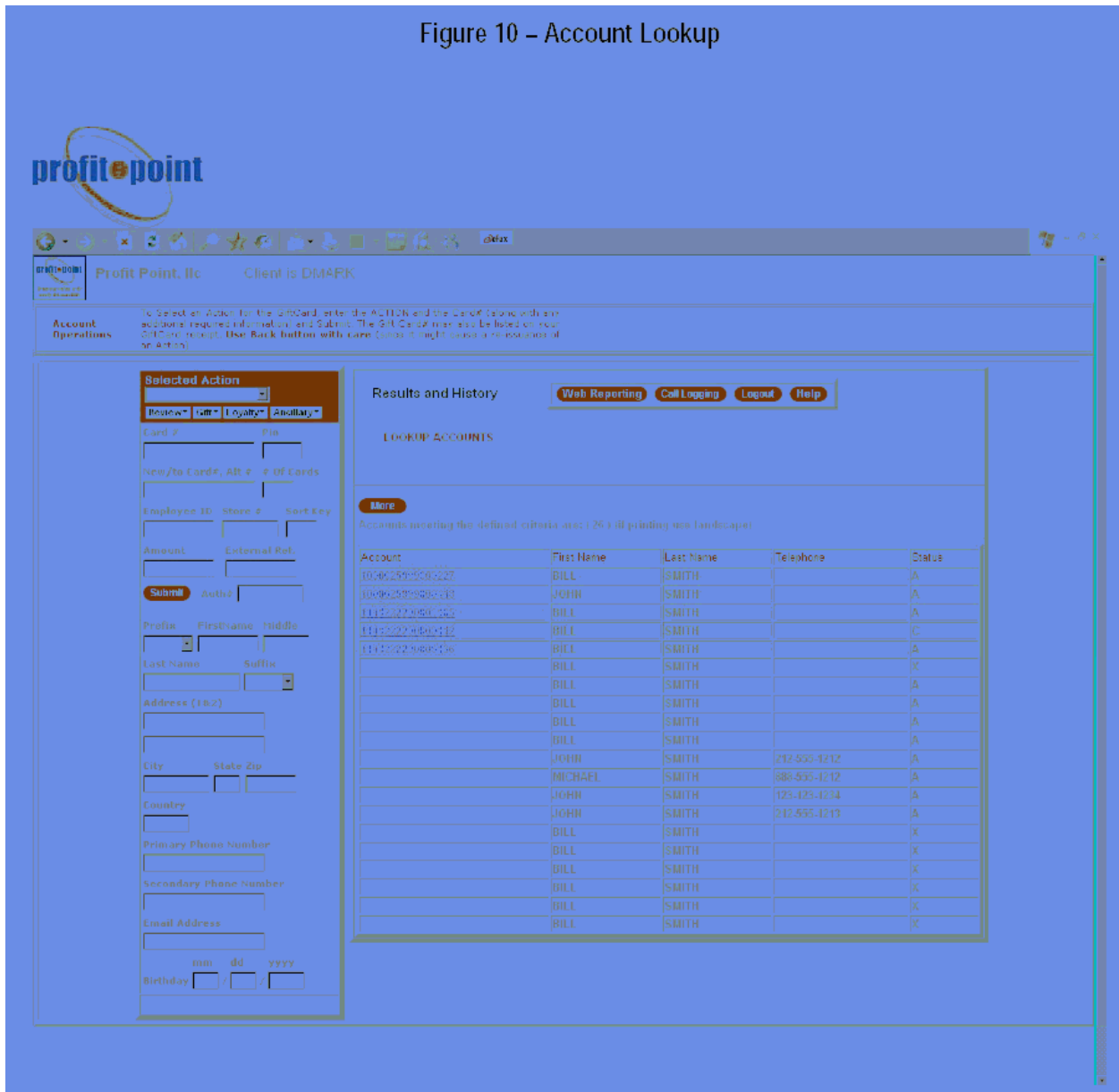
Account: 199999004003194

Please Answer the following questions:

1. When did you last visit Europe? (mm-dd-yyyy)  /  /
2. When did you last visit Europe? (mm-dd-yyyy)  /  /
3. What is your estimated USTA rating range? From  To
4. What are your favorite musical groups? (choose upto 3)
5. Anniversary (mm-dd-yyyy)  /  /
6. Anniversary (mm-dd-yyyy)  /  /
7. Challenge Question
8. Challenge Answer
9. Where would you like all correspondence forwarded to?
10. General Question for all FRAZEE
11. General multiple choice question for all groups?

The preferences entry screen can have 5 type of questions presented for answers associated with the specific account. The question types are: Textual information up to 80 characters, a date, a from\to number (i.e. ages of children are from 2 to 12), a multiple choice with up to a limited number of answers, and a numeric response.

Figure 10 – Account Lookup



The account lookup screen will show all the accounts that meet the specified entered criteria with the lookup account action. The user should then select the correct account and use that in the card number field by simply clicking on it then move on to selecting an action.

## *Glossary of Functions*

**Action**= Allows you to select the type of transaction you would like to perform.

**# of cards**= Used for multiple issuances, it allow you to select the number of cards you will be issuing value to.

**Card #**= The card number, taken off the back of the card, you will be performing the transaction on. The card number must be entered in its entirety.

**Sort Key**= This key is only used for specific clients who have identified specific data they wish to have sorted, such as a tip or a payment type. The information entered into this field can be used when sorting reports.

**New Account# or To Account or Alt#**= New Account # is used when performing transfer or combine function. The old account number would be entered in the first and the account to be transferred to or combined with would be entered in this field. To Account is used when performing a multiple issuance transaction. The starting number would be entered in the card# field and the ending number would be entered in the To Account field. Alt# is used when a card is being enrolled and a phone number is being associated with that specific card number.

**Sales Associate#**=The employee ID number which associates the employee performing the transaction with the actual transaction.

**Store#**= Defines the store performing the transaction or asking for the transaction to be performed. If no store number is specified, Customer Service will be used in place of a store number.

**Amount**= The value you wish to associate with the transaction.

**External Ref.**= An associated number you wish to link to this transaction. For example, a transaction number off of a POS.

**Void Auth#**= Used for either voiding a transaction or obtaining a detailed history of a transaction. You must enter the ProfitPoint Transaction number in order to use this function.

**Submit**= Used to initiate the transaction being performed.

**Demographic Information**= The fields below the transaction functions are used to associate demographic information with a card. The Standard fields are: Prefix, First Name, Middle Name, Last Name, Suffix, Address 1 & 2, City, State, Zip, Country, Primary Phone, Secondary Phone, Email Address, and Birthday. Demographics can be gathered on either a giver of a card or user of a card. Specific questions can be asked of the giver and/or user if set up ahead of time.

### **Glossary of Transactions**

**Issuance**= Adding money to a gift card. You must have the entire card number and the amount to perform this transaction.

**Redemption**= Removes money from a gift card. You must enter the entire card and the amount to perform this action.

**Inquiry**= Requests and displays the history of the card. The entire card number must be entered to obtain the history.

**Void**= Reverses a previous transaction. You must enter the entire card number in the Card # field and you must provide the ProfitPoint transaction number in the Void Auth # field.

**Merchandise Return**= Adding money to a gift card due to having merchandise returned. You must enter the entire card number to perform this transaction.

**Loyalty Accumulation**= Adding points or value to a loyalty card. You must enter in the entire card number and the amount to perform this transaction.

**Loyalty Redemption**= Removes points or value off a loyalty card. You must enter in the entire card number and the amount to perform this transaction.

**Replace**= In the event a card is lost or stolen, you can replace the lost/stolen card with a new card. All of the previous card's history will be transferred to the new

card. You must enter in the entire original card number in the Card # field, as well as the entire new card number in the To Account # field.

**Combine**= In the event a customer has two cards and only wishes to carry one, you can combine one card with the other, transferring the history from the first card to the history of the second. This action would make the first card inactive and the second card active. You must enter in the entire original card number in the Card # field, as well as the entire new card number in the To Account # field.

**Cancel**= In the event a card needs to be inactive, you can perform a cancel of the card. You must enter the entire card number to perform this transaction.

**Activation**= This separate transaction is used to set a card to active. It allows you to associate demographics with the card. This transaction requires you enter the entire card number.

**Enroll**= This action is used to add a customer to the database. Enroll allows you to connect a card number with a phone number, which can be used later for account lookups. This transaction requires you to enter the entire card number.

**Adjustment Gift**= Either crediting or debiting value on a gift card. This transaction requires you enter the entire card number, as well as the amount being credited or debited. If the amount is being debited a – must be put in front of the value.

**Adjustment Loyalty**= Either crediting or debiting points or value on a loyalty card. This transaction requires you enter the entire card number, as well as the point value being credited or debited. If the points value is being debited a – must be put in front of the value.

**Adjust MR**= Either crediting or debiting points or value on a merchandise return card. This transaction requires you enter the entire card number, as well as the amount being credited or debited. If the amount is being debited a – must be put in front of the value.

**Loyalty Return**= Adds points or value back on a loyalty card as a result of a return. This transaction requires you to enter the entire card number and the value being added to the card.

**Loyalty Visit Accum**= Adds visits to a loyalty card. This transaction requires you to enter the entire card number, as well as the number of visits you wish to add to the card. The number of visits to be added is placed in the amount box.

**Loyalty Visit redeem**= Takes visits off of a loyalty card. This transaction requires you to enter the entire card number, as well as the number of visits you wish to remove from the card. The number of visits to be removed is placed in the amount box.

**History Lookup**= Provides detailed information regarding a specific transaction number. The specific transaction number is placed in the void auth# field. The entire card number must be provided.

**Multiple Issuance**= Allows you to add money to multiple cards at one time. This transaction requires you to enter the entire card number.

**Profile**= Allows you to see the profile that has been established for a specific card. The entire card number must be provided.

**Add/Upd Giver Profile**= Allows you to add or change information within the card giver's profile. You must provide a card number to perform this transaction.

**Add/Upd User Profile**= Allows you to add or change information within the card user's profile. You must provide a card number to perform this transaction.

**Add/Upd Preferences**= Allows you to change the answers to the preference questions asked. The preference questions must be determined ahead of time. You must provide a card number to perform this transaction.

**Account Lookup**= Allows you to look up a card number based on demographic information. You must enter at least a last name or phone number to obtain the card information.

**Re-activate**= Allows you to re-instate a non-active card. This transaction requires you enter the entire card number.

**Get Help Information**= Provides you with a list of definitions for using this product

**Log Out**= Terminates your current Allegiance session

### **Account Function Selection**

After you have entered in your Client ID, log in and password and you have been verified in the system, you will be brought to the Account Function Selection

screen. This screen allows you to perform transactions, as well as update demographic information.

To perform a transaction:

- . • Choose the transaction type you wish to perform (issuance redemption, loyalty accumulation, etc.) from the drop down box.
- . • If performing a multi-issuance function (issuing a series of cards with the same value), enter the number of cards to be issued in the box provided.
- . • Enter the card number you wish to perform the transaction with. For demonstration purposes, please use card number 1999999999007044.
- . • The sort key can be used to define the payment type being used (cash, credit, pre-owned, tip, etc.)
- . • The next line serves several purposes depending on what function you are performing
  - a. o If you are performing a transfer, combine or replace function on the card, enter the new account number you will be using in the next line.
  - b. o If you are performing a multi-issuance function, enter the ending card number in this line.
  - c. o If you are enrolling a card, an alternate phone number can be associated with the card for look up purposes.
- . • Enter in a sales associate #, if applicable.
- . • Enter in the store # of the store asking to perform the transaction.
- . • Enter the amount to be associated with the card. Please include decimal points.
- . • Enter in an external reference #, if applicable.
- . • Click the submit button.
- . • To the right of the screen, you will see the transaction either being accepted or denied and you will see the new account balance and the card history.

. • There is a more button above the card history. 10 transactions will be displayed at one time, in order of newest to oldest. To see the next 10 transactions, press the more button.