

My Program Admin Training Manual

Basic Navigation

To access the Merchant Portal you will need your Location ID, Employee ID and Password. Your sales rep can provide you with this information. You will access your portal at <https://new.myprogramadmin.com>. When logging in please note that **cookies must be enabled** and the sign in credentials are case sensitive.

MY PROGRAM ADMIN

Employee Sign-in

Some sign-ins have changed. If your sign-in begins with a zero you must remove it. For example if you use to sign-in with Employee: 0412 you will now enter 412. If you use to use 0024 you will now enter 24.

Location

Employee

Password

Sign-in

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Enter your Location ID, Employee ID, and Password. If the credentials you used to sign in to the old system began with zeros, you need to drop the zeros. For example, if your employee number is 0084, you will sign in with 84. Click "Sign In".

This will bring you to your main location page.

The screenshot shows a web application interface. At the top, there is a navigation bar with tabs: Main, Locations, Programs, Marketing, Reports, and Support. Below this is a sub-navigation bar with links: Index, Add, Employees, Terminals, Stored Value, Card Sets, Accounts, and Report. The main content area is divided into two columns. The left column displays the details for 'Java Joe's [823145]'. The right column displays the 'Transaction Reporting' section.

Java Joe's [823145]

Name	Java Joe's
Status	Enabled
Cross-ref Id	
External Id	823145
Time Zone	America/New_York
Address 1	8492 Superior Ave
Address 2	
City	Cleveland
State	OH
Postal	44109
Country	US
Phone	216 664 8790
E-mail	Admin@javajoes.com
Contact	

[Edit](#) [Show Advanced Options](#)

Custom Fields

Label	Value
-------	-------

Transaction Reporting

This Location: Single Card:

Today [Report](#) [Report](#) [Edit](#)

At the top of the page, you will notice several tabs. Each of these main tabs has a set of sub tabs. This helps you to navigate the program and narrow down your desired activity.

The screenshot shows the navigation bar of the web application. It consists of two rows of tabs. The top row contains main tabs: Main, Locations, Programs, Marketing, Reports, and Support. The bottom row contains sub-tabs: Index, Add, Employees, Terminals, Stored Value, Card Sets, Accounts, and Report.

The screenshot shows a breadcrumb trail at the top of a page. The trail consists of a home icon followed by the following links: Location, Java Joe's, Program, Java Joe's Loyalty, and View. The links are in blue text and are separated by right-pointing chevrons.

As you navigate through the program, a set of breadcrumbs develop under the sub tabs. These help you track forward and backward through the pages you have been to.

Links are shown as text in blue font. If a name, number, or word is blue, clicking it will bring you to a new page or show you a report associated with it.

Employees

Name	Emp Id	Admin
Admin Employee	1000	<input checked="" type="checkbox"/>
Bob Smith	2000	<input type="checkbox"/>
General Manager	3000	<input type="checkbox"/>
Jim Dodge	1212	<input type="checkbox"/>

 Add  All (4)

Reports

You have many options for running reports in your web portal. You can run reports for transactions, customer data, liability, employees and terminals.

The report that you are likely to use most often is the transaction report. You have several options for how to run this report. The simplest way is to use the Quick Report option on your Location home page. It is located on the right side of the screen, under the Transaction Reporting header. In the drop down menu choose the date or date range you want a report for. Click "Report".




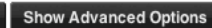
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Main **Locations** Programs Marketing Reports Support
Index Add Employees Terminals Stored Value Card Sets Accounts Report

Home > Location > Java Joe's > View

Java Joe's [823145]

Name	Java Joe's
Status	Enabled
Cross-ref Id	
External Id	823145
Time Zone	America/New_York
Address 1	8492 Superior Ave
Address 2	
City	Cleveland
State	OH
Postal	44109
Country	US
Phone	216 664 8790
E-mail	Admin@javajoes.com
Contact	

 Edit  Show Advanced Options

Transaction Reporting

This Location

Single Card

- Today
- Yesterday
- This week (Mon-Sun)
- 7 Days
- Last week (Mon-Sun)
- This month
- Last month
- This year
- Last year

Report

Report

Edit

After running the report you will notice a grey box that shows the date range you chose to report on, as well as several checkboxes to the right. The check boxes control what information you view in your report. Each check box represents a column in the report. You can edit what information you view by checking and unchecking the appropriate boxes, then clicking "Go", this will regenerate the report.

Main Locations Programs Marketing Reports Support

Index

Location > Java Joe's > Report > Location

Location Java Joe's [823145] Transaction Report

2011-01-01 to 2011-12-31

Trans Id Card Id Term Id Location
 Emp Id Batch Ref Approval Code Promo
 Type Amt Ent Bal Diff Tip
 Processed Comm Related Name
 E-Mail Adjust Reason Birthday Cross-Ref Id

Go View Location Edit Location

Transaction Totals Summary

Operation	Transactions	Curr USD [4606]	Pts [4607]	Pun [4582]
Account History	4	0.00	0.00	0.00
Enrollment	4	0.00	0.00	0.00
Gift Issuance	9	170.00	0.00	0.00
Inquiry	6	0.00	0.00	0.00
Loyalty Issuance	12	0.00	160.00	0.00
Loyalty Redemption	2	0.00	-2.00	0.00
Promo Issuance	6	0.00	0.00	25.00
Promo Redemption	2	0.00	0.00	-13.00
Totals	45	170.00	158.00	12.00

Transactions between 2011-01-01 and 2011-12-31

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Card Id	Trans Id	Approval Code	Term Id	Location Id	Batch Ref.	Emp Id	Type	Amt Ent	Processed Time	Void
911441425728926	2196333	883714	1	Java Joe's [823145]	1	1	Gift Issuance	10.00	2011-05-27 15:39:24.02-04	
911441433386517	2196337	221174	1	Java Joe's [823145]	2	1	Loyalty Issuance	10.00	2011-05-27 15:39:59.849-04	
911441433386517	2196351	148203	1	Java Joe's [823145]	3	1	Loyalty Issuance	10.00	2011-05-27 15:41:30.519-04	
911441433386517	2196357	249076	1	Java Joe's [823145]	4	1	Inquiry		2011-05-27 15:41:59.284-04	
911441433386517	2196368	893125	1	Java Joe's [823145]	5	1	Gift Issuance	10.00	2011-05-27 15:42:57.758-04	
911441449051217	2196375	352556	1	Java Joe's [823145]	6	1	Gift Issuance	20.00	2011-05-27 15:43:29.155-04	
911441496221226	2196376	280859	1	Java Joe's [823145]	7	1	Gift Issuance	15.00	2011-05-27 15:43:48.076-04	
911441453753416	2196379	321062	1	Java Joe's [823145]	8	1	Gift Issuance	10.00	2011-05-27 15:44:04.374-04	
911441462167329	2196381	706187	1	Java Joe's [823145]	9	1	Gift Issuance	25.00	2011-05-27 15:44:43.986-04	
911441425728926	2196384	7212	1	Java Joe's [823145]	10	1	Gift Issuance	50.00	2011-05-27 15:45:00.765-04	
911441493317456	2196393	170814	1	Java Joe's [823145]	11	1	Gift Issuance	10.00	2011-05-27 15:45:57.349-04	

You will also notice a Transaction Totals Summary which gives you a snapshot of what types of transactions were run, how many of each, and the total values. In the report, if a transaction is highlighted pink it means that the transaction was voided.

Another way to access the reports you can run is by clicking on the Programs Tab. You will see an index of the programs your location is currently a part of. To view the reports that are available for that program, click on the program name.

There is a header labeled Reporting on the right side of the screen. Under this heading are several reporting options. Anything in blue font is a link, clicking on any report name here will take you to the report. Below is a description of each report:

Transaction: Detailed of all transactions that were run in a given time period. This can be done for a specific program or for a location as a whole.

Centralized: This report is for merchants that have more than one location and have an accounting system that uses one main account that funds are deposited into and then dispersed from.

Decentralized: This report is for merchants with more than one location and have an accounting system in which the locations all pay each other rather than depositing into a main account.

Account Data: This report allows you to see the customer data that has been added to card numbers.


Totals by Program: Summary of the number and types of transactions run in each program.

Liability: Card status summary, showing how many cards are active, expired and in inventory as well as the value totals on those cards.

The third way to run a report is by clicking on the Reports Tab. This allows you to search for the report you are looking for. Type in the name of the program you want a report for and click Search. This will generate a list of the reports for that Program. You can then click on the Report name.

Reports Search

Please enter a location or program id, name or combination of both.



Reports Search

Please enter a location or program id, name or combination of both.


Reports Search Results

« Previous Page 1 of 1 Go

Name	Type	View
Java Joe's Loyalty	Program	Decentralized Report Centralized Report Transaction Report Account Data Report Totals By Program Liability

« Previous Page 1 of 1 Go

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Card Edit

Another feature that will be used often is the Card Edit capabilities. You can get to the card edit page from your location home page.

The screenshot shows the application's navigation menu with tabs for Main, Locations, Programs, Marketing, Reports, and Support. Below this is a secondary menu with links for Index, Add, Employees, Terminals, Stored Value, Card Sets, Accounts, and Report. The breadcrumb trail indicates the current location: Location > Java Joe's > View. The main content area is split into two sections. On the left, under the heading 'Java Joe's [823145]', there is a table of card details: Name (Java Joe's), Status (Enabled), Cross-ref Id, External Id (823145), Time Zone (America/New_York), and Address 1 (8492 Superior Ave). On the right, under the heading 'Transaction Reporting', there is a sub-section 'This Location Single Card'. It contains a dropdown menu set to 'Today', a 'Report' button, a text input field containing the card number '911441425728926', another 'Report' button, and an 'Edit' button. A green triangle icon is visible in the bottom right corner of this section.

Type in the card number you are looking for in the “Single Card” box.

If you are simply looking for card information such as balance details and customer data already entered you can click “Report” which will bring you to the card summary page.

However, if you need to edit the card (add customer information, change a card status or change the balance) you will click “Edit”.

You will notice several different headers on the Edit page.

At the top left is the basic card information, including the card number, pin, and activation date. The right side of the screen shows the Balance information and the option to change the expiration date.

The screenshot shows the 'Card Edit' page for card number 911441425728926. At the top, a yellow banner contains a 'Please Note' message: 'Status, expiration, and balance changes will produce a transaction.' The page is divided into two main columns. The left column, titled 'Card 911441425728926 Edit', contains a table of card details: Cross-ref Id, PIN (385081), Card Set (Initial 100 [4198]), Initial Card Set (Initial 100 [4198]), Initial Set Sequence (1), Status (Activated), Activation (2011-05-27 15:39:24.02-04), Demo (checkbox), and Adjustment Reason (text input). Below this table are 'Save' and 'Cancel' buttons. The right column contains three sections: 'Balances' with fields for Currency (60.00 USD), Points (10.00), Difference (+/-), Type ([None]), and Adjustment Reason, with an 'Adjust' button; 'Expiration' with an 'Expiration Date' field and a note 'To expire a card enter a date in the past', and an 'Update Expiration' button. At the bottom of the left column are 'View' and 'Report' buttons.


If you are editing the expiration date from Active to Expired, the first step is to enter in a date in the past in the expiration date box on the right, then click “Update Expiration”. This will automatically update the Status box on the left. Similarly, if you are changing the status from Expired to Activated, you can change the expiration date, click Update Expiration and the status will be updated.

To change the balance of a card, enter in the difference amount in the Difference box under the Balance header. Select the Type of value you are adding or subtracting and click Adjust.

If you scroll down you will see the Custom Fields on the left and the customer information on the right. To edit this information you will need to fill in the appropriate fields, then click “Save Customer” at the bottom of the page. If you are adding mobile numbers or email addresses for marketing purposes be sure to check the corresponding “Opt-In” box in order to ensure that the SMS and Email broadcasts are sent to the customer.

Customer Custom Fields	
Favorite Cup of Coffee	<input type="text" value="Mocha"/>

Customer	
First Name	<input type="text" value="James"/>
Middle Name	<input type="text"/>
Last Name	<input type="text" value="Byron"/>
Prefix	<input type="text"/>
Suffix	<input type="text"/>
Address 1	<input type="text" value="124455 Main Street"/>
Address 2	<input type="text"/>
City	<input type="text" value="Chicago"/>
State	<input type="text" value="Illinois"/>
(Other)	<input type="text" value="IL"/>
Postal Code	<input type="text"/>
Country	<input type="text" value="United States"/>
Mail Opt In	<input type="checkbox"/>
Phone	<input type="text"/>
Mobile Phone	<input type="text" value="555 555 5555"/>
Alt Phone	<input type="text"/>
Phone Opt In	<input checked="" type="checkbox"/>
E-mail	<input type="text" value="Byron@gmail.com"/>
Alt E-mail	<input type="text"/>
E-mail Opt In	<input checked="" type="checkbox"/>
Birthday	<input type="text" value="1980-06-11"/>
Anniversary	<input type="text"/>
Gender	<input type="text" value="Male"/>
User-name	<input type="text" value="ByronBlam"/>
Password	<input type="password"/>
<input type="button" value="Save Customer"/> <input type="button" value="Cancel"/>	



Employee Add and Edit

If you have decided to require an employee id and/or password at the terminal level, you will need to add the employees into your portal. Or, if you have additional employees that you should have access to the online portal, you will need to add them as well. To do this, from your location home page, scroll down to the Employee header.

The screenshot displays a web application interface with a navigation menu at the top. The main content area is divided into several sections:

- Location Details:** A form for "Java Joe's [823145]" with fields for Name, Status, Cross-ref Id, External Id, Time Zone, Address 1, Address 2, City, State, Postal, Country, Phone, E-mail, and Contact. Below the form are "Add", "Edit", and "Show Advanced Options" buttons.
- Hot Note:** A text area for notes with a "Save Note" button.
- Transaction Reporting:** A section with a "This Location" dropdown set to "Today" and a "Report" button, and a "Single Card" section with "Report" and "Edit" buttons.
- Custom Fields:** A table with columns "Label" and "Value" containing five rows labeled "Custom 1" through "Custom 5".
- Employees:** A table listing employees with columns "Name", "Emp Id", and "Admin".

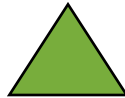
Name	Emp Id	Admin
Admin Employee	1000	<input checked="" type="checkbox"/>
Bob Smith	2000	<input type="checkbox"/>
General Manager	3000	<input type="checkbox"/>
Jim Dodge	1212	<input type="checkbox"/>

Below the table are "Add" and "All (4)" buttons.
- Terminals:** A table listing terminals with columns "Terminal Id", "Type", and "Manufacturer's Id".

Terminal Id	Type	Manufacturer's Id
1	Hypercom Optimum M4100	
2	Web Terminal	

Below the table are "Add" and "All (2)" buttons.

Click Add.



This will bring you to the Employee Add page, which will allow you to add a new employee.

Java Joe's [823145] Employee Add

Employee Id: 9876 may be merchant's choice

Password: web administration

First Name: Joe

Middle Name:

Last Name: Smith

E-mail:

Phone: AAA LLL LLLL

Status: Enabled

Password at POS: point-of-sale device
Older web terminals require passwords to be 4 digits

Employee Privileges

Administrator

Account View Edit

Card View Edit

Customer View Edit

Employee View Edit

Location View Edit

Broadcasts SMS E-Mail

Transaction View

Execute

- Enrollment
- Gift Issuance
- Gift Redemption
- Inquiry
- Loyalty Issuance
- Loyalty Redemption
- Multiple Issuance
- Promo Issuance
- Promo Redemption
- Renewal

Below is a description of each field on this page:

Employee Id: This is your choice for how you want to identify your employees. Typically it is a numeric 1-4 digit number.

Password: This first password is for web administration access. If you are adding an employee that is going to be allowed access to the online portal, you must assign a web password. It must be at least 6 digits long. If the employee does not have access to the online portal you can leave this blank.

First/Middle/Last Names: This is the name of the employee you are adding.

E-mail: This is an optional field to store the email address of your employee.

Phone: Another optional field to store additional employee information.

Status: Any employee you add that will be running transactions or logging in to the portal needs to be at Enabled status. However, if you need to suspend their access at any time, you can change the status to Quit, Suspended, or Terminated. If an employee is set at any of those statuses they will not be allowed to log in or run transactions.

Password at POS: This is for any employee that will be entering a password into the terminal. It should be numeric only, typically 4 digits in length.

On the right side of the page is where you can set the privileges for each employee. Below are descriptions of each privilege.

Administrator: If this employee should have access to the online portal, this box must be checked. If it is not checked, they will not be allowed to sign in.

Account: Every card number has a corresponding account number, which contains customer, card, and balance information.

Card: If you want the employee to be able to view or edit card information (such as balances or expirations), check the appropriate boxes.

Customer: You can choose whether or not the employee can view or edit customer information such as name, phone number, and address.

Employee: This allows the employee to view and edit other employee information.

Location: This allows the employee to view and edit the merchant location information.

Broadcasts: You can allow your employees to send SMS and/or Email broadcasts.

Transaction: You can choose which transactions you want each employee to perform, in this case the employee can only do Gift Issuances and Redemptions, Loyalty Issuance and Redemption as well as Inquiries and Tips. However, the transaction would fail if the employee tried to void a transaction.

Once you have finished choosing the employee privileges, click Save.

A blue confirmation box will show up.

This document covers the main functions of your online portal. Contact your gift card provider with any

Info:

Employee successfully added.

additional questions you may have.