



# AUTOMOTIVE

## ACKROO TRAINING GUIDE: Using The Virtual Terminal (for Dealerships)

MAY 2018

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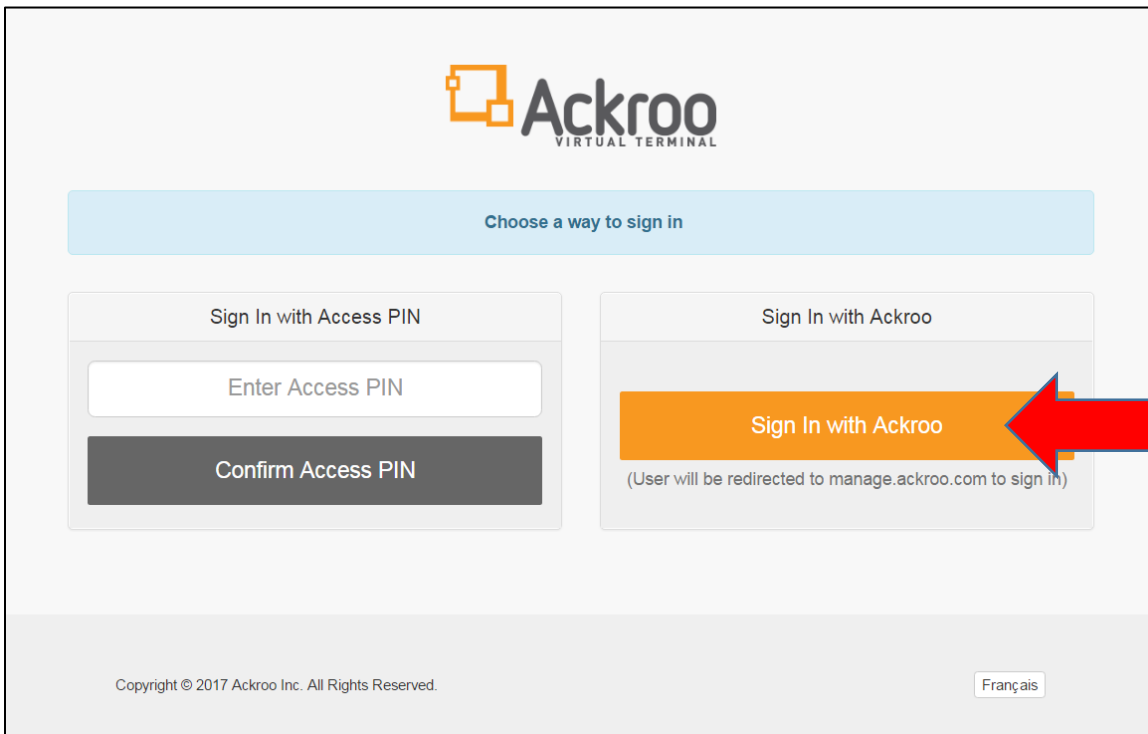
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### USING THE VIRTUAL TERMINAL – BASIC ACCESS

**NOTE:** System requires Broadband Internet access. Recommended browser is *Google Chrome*, or *Internet Explorer 10* or newer.

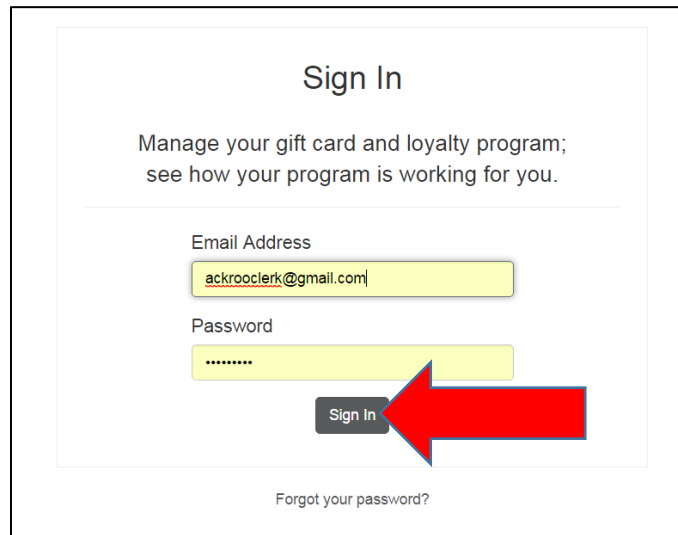
#### **LOGGING IN**

- The Virtual Terminal is found at <https://vt.ackroo.com>. This is your access point for:
  - Card and balance lookup
  - Card Registration / Rewards enrollment
  - Transaction processing
- For ease of access, please *bookmark* or *favourite* this website on your web browser.
- To sign in, select the **Sign In with Ackroo** button.



- Enter your email address and password and select **Sign In**.
- You can select **Forgot your password?** to reset if forgotten. An email will be sent to you prompting further reset instructions.
- **NOTE:** An email message should have previously been sent from [no-reply@ackroo.com](mailto:no-reply@ackroo.com), prompting you to set up your new user access & password. If you don't recall this step, check your junk folder, or if not received, please contact your Business Manager or Controller to assist).

(LOGGING IN – cont'd)



Sign In

Manage your gift card and loyalty program;  
see how your program is working for you.

Email Address  
ackrooclerk@gmail.com

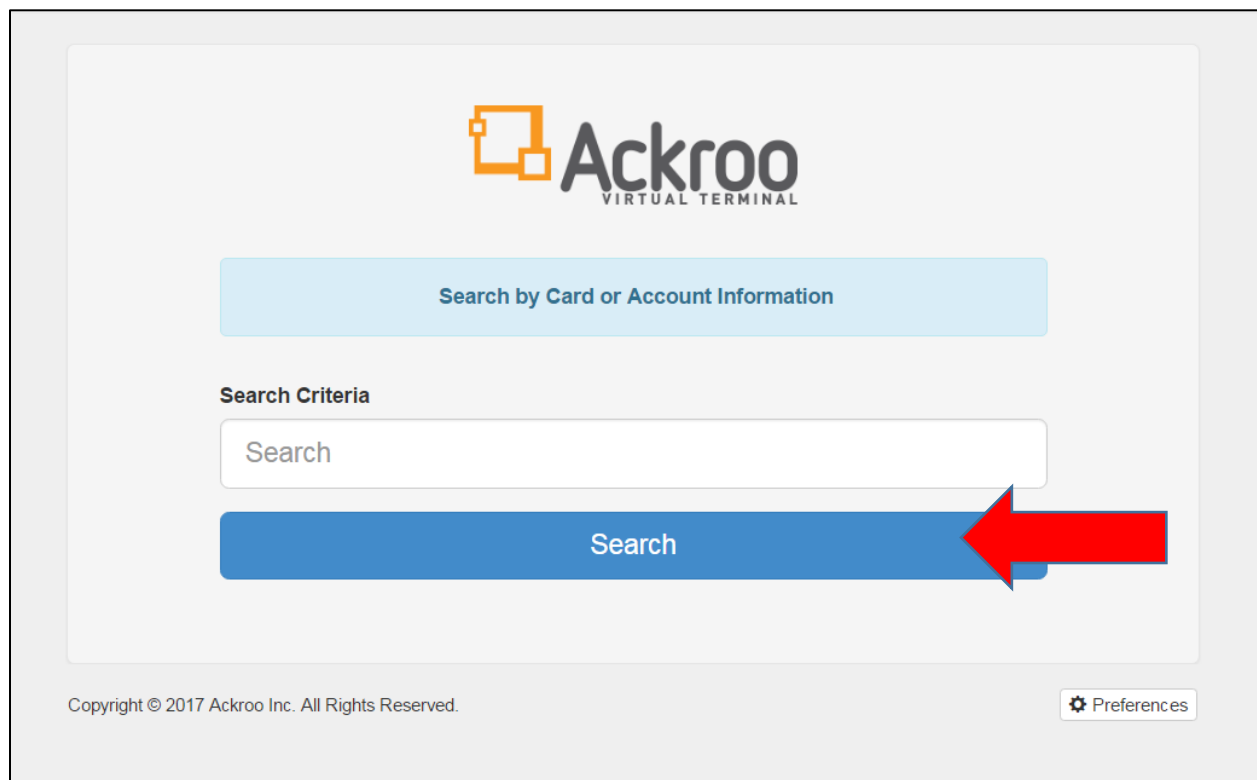
Password  
\*\*\*\*\*


Sign In

Forgot your password?

## SEARCH CRITERIA

- Once signed in, you will arrive on the Search Criteria page.
- You can search for a rewards card or customer account by the following options:
  - **Card Number** (Ex. DR100001)
  - **First Name and/or Last Name** (Ex. John Smith)
  - **Reference ID / DMS Customer Number** (Ex. 23535)
  - **Ackroo ID** (Ex. 001-12345)



 **Ackroo**  
VIRTUAL TERMINAL

Search by Card or Account Information

Search Criteria

Search

Search

Copyright © 2017 Ackroo Inc. All Rights Reserved. [Preferences](#)



## Dealership Rewards

SERVICE **A)**

Lookup New Card **B)**

Customer **C)**

Card Number  
DLT1 0000 5

Registered to  
Jane Smith

Reference ID  
123123 (Dealership Rewards)

Communications Consent  
Yes

Edit Registration **D)**

Remove Registration **E)**

### Balances

Gift **F)** **\$0.00**

#### Loyalty

SERVICE **G)** \$40.00

Earned \$40.00

Promotional \$0.00

SALES \$80.00

Earned \$80.00

Promotional \$0.00

View Transactions **H)**

### CUSTOMER ACCOUNT MENU

A) Business and Department you are signed into

B) Return to Search Criteria page for new lookup

C) Customer Account Information:

- Card Number
- Customer Name
- Reference ID (Customer DMS Number) \*
- Email opt-in consent

*\***NOTE:** ALWAYS verify that a **Reference ID** is listed and matches customer ID within your DMS system.*

D) Register / Edit Registration (Customer details)

E) Remove/Unregister the card

F) Gift Card Balance (if applicable)

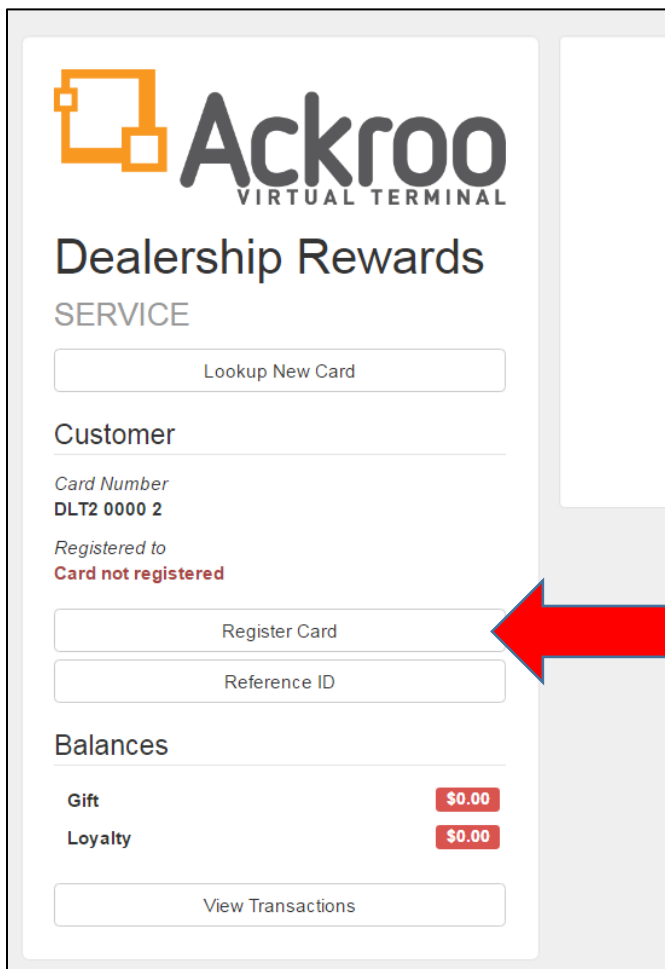
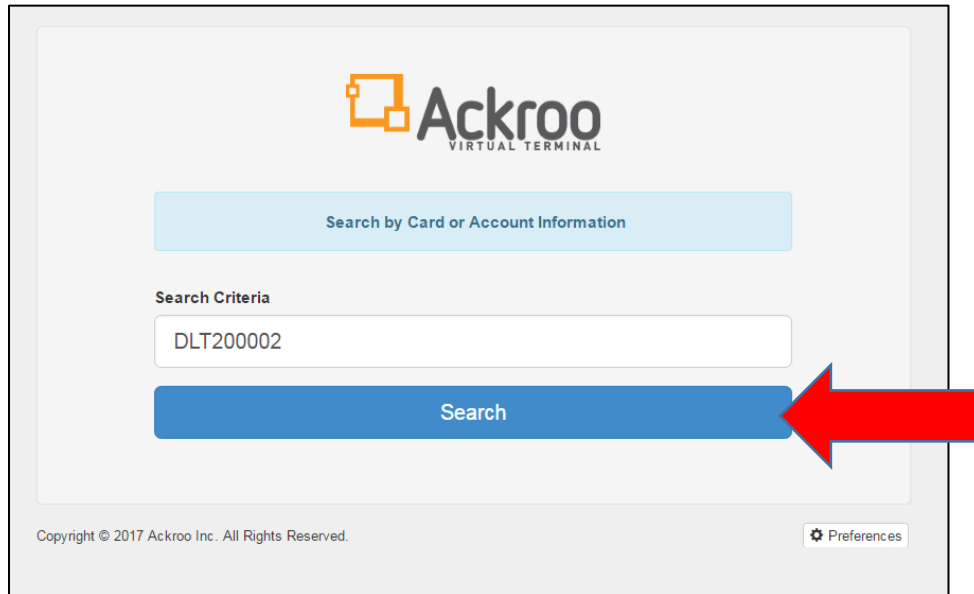
G) Rewards Balance by department

- Earned (% accumulated at purchase)
- Promotional (Bonuses awarded)

H) View Transactions (History)

## CARD REGISTRATION (ENROLL A NEW REWARDS MEMBER)

- From the search criteria page, enter the **Card Number** or **Ackroo-ID** located on the back of the newly designated card.
- Press Enter or Select **Search**.



- Ensure that the card is not already registered under the “Registered to” section, indicating **Card not registered** in red.
- Select the **Register Card** menu button.

- The following registration fields are **MANDATORY**:
  - **FIRST NAME**
  - **LAST NAME**
  - **REFERENCE ID (Customer DMS Number)**
  - **COMMUNICATIONS OPT-IN (as indicated on customer sign-up sheet)**
- ALL OTHER registration fields (email, mailing address, etc.) are *highly recommended* for identification purposes and future marketing initiatives.
- Once all fields are entered, select **Register Card** to save.

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Register

6377 3858 5751 3468 81

Salutation

Select salutation ▼

First Name

Enter first name ⓘ

Last Name

Enter last name

Email Address

Enter email address

Phone Number (XXX-XXX-XXXX)

Enter phone number

Date of Birth (YYYY-MM-DD)

Enter date of birth

Reference ID(s)

Enter reference ID

Populating this field will add a new reference ID to this profile. If there are any existing reference IDs, they will be shown below. To remove a reference ID, click on the 'X' icon besides it.

Address Line 1

Enter address line 1

Address Line 2

Enter address line 2

City

Enter city

Country

Select country ▼

Province / State

Select province or state ▼

Postal / Zip Code

Enter postal or zip code

Communications Opt In

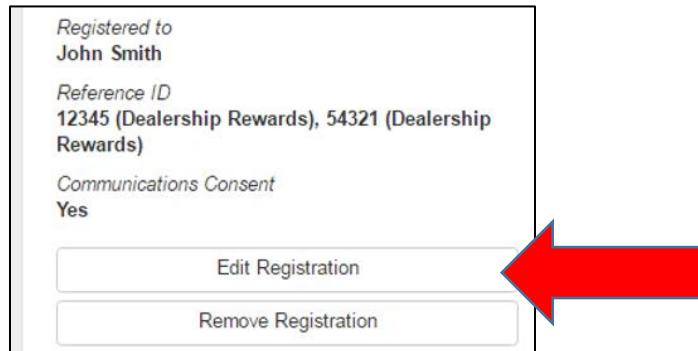
☐ Customer has agreed to receive email communication

Register Card



## EDIT/ADD REGISTRATION DETAILS

- If any customer details have changed or should be added/modified, select **Edit Registration** to update.



Registered to  
John Smith

Reference ID  
12345 (Dealership Rewards), 54321 (Dealership Rewards)

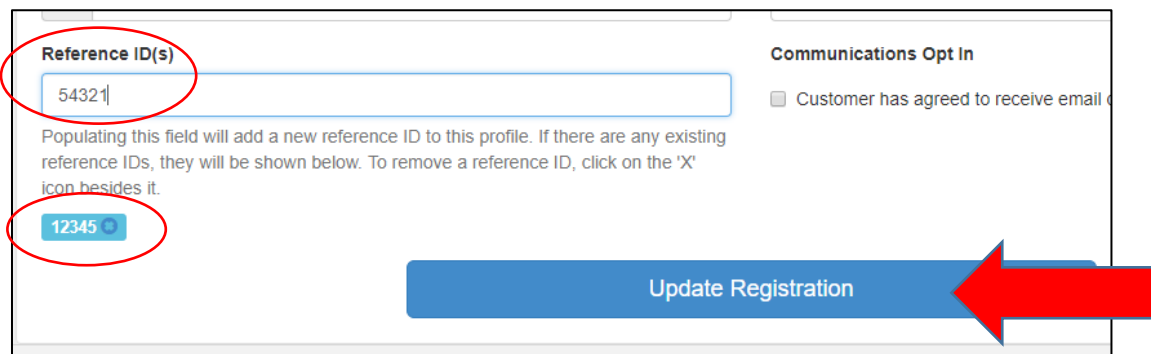
Communications Consent  
Yes

Edit Registration

Remove Registration

A red arrow points to the 'Edit Registration' button.

- NOTE: Multiple customer numbers** may be associated to the same card to share an accumulated balance (Ex. Spouses or family members of the same dealership)
- To add additional customer numbers to the same card, enter the new Reference ID and select **Update Registration**.
- If the Reference ID was entered incorrectly, you can select the blue 'X' button beside it to remove it.
- Then re-enter the correct ID number and select **Update Registration**.



Reference ID(s)

54321

Populating this field will add a new reference ID to this profile. If there are any existing reference IDs, they will be shown below. To remove a reference ID, click on the 'X' icon besides it.

12345

Communications Opt In

☐ Customer has agreed to receive email

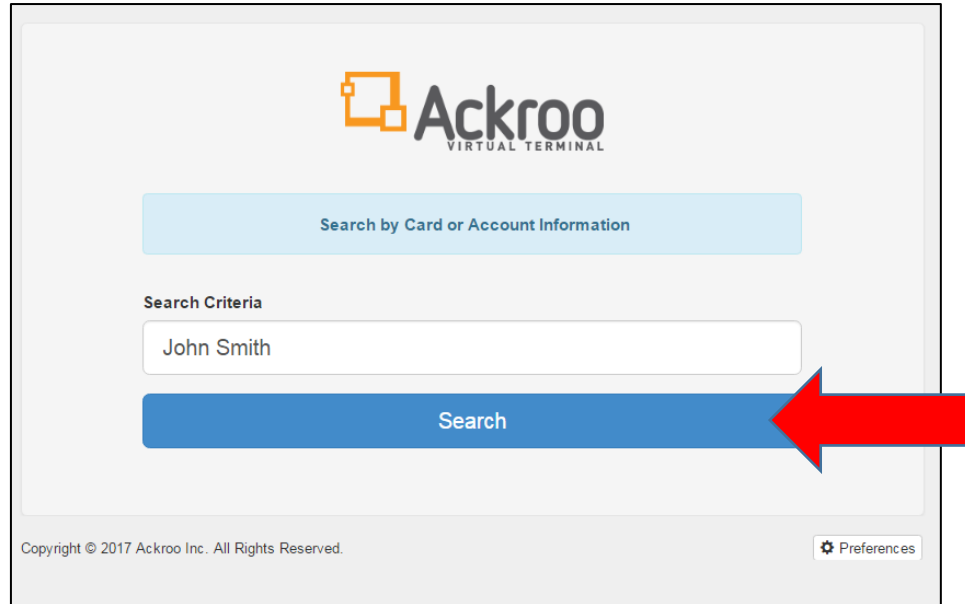
Update Registration

A red arrow points to the 'Update Registration' button.



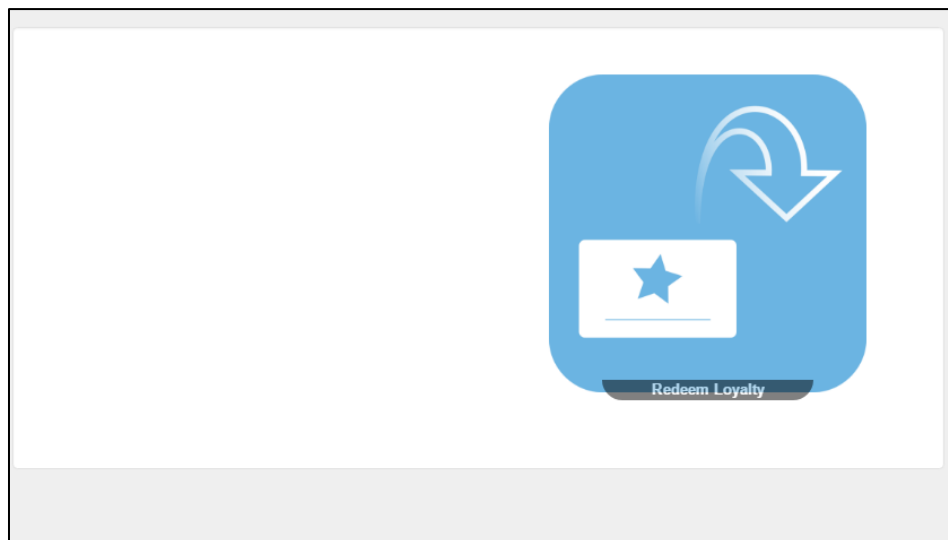
## **REDEEM LOYALTY (APPLY REWARDS TO A CUSTOMER PURCHASE)**

- From the Search Criteria page, search for an existing rewards customer by:
  - **Card Number** (Ex. DR100001)
  - **First Name and/or Last Name** (Ex. John Smith)
  - **Reference ID / DMS Customer Number** (Ex. 23535)
  - **Ackroo ID** (Ex. 001-12345)
- Press Enter or select **Search**.



The screenshot shows the Ackroo Virtual Terminal interface. At the top is the Ackroo logo with the text "VIRTUAL TERMINAL" below it. Below the logo is a light blue button labeled "Search by Card or Account Information". Underneath this is the "Search Criteria" section, which contains a text input field with "John Smith" entered. Below the input field is a large blue button labeled "Search". A large red arrow points to the "Search" button. At the bottom left, there is a copyright notice: "Copyright © 2017 Ackroo Inc. All Rights Reserved." At the bottom right, there is a "Preferences" link with a gear icon.

- Select the **Redeem Loyalty** menu option.



- **Purchase Amount** – Enter the Total INVOICE amount which the customer is paying.
- **Amount** – Enter the Total REWARDS amount which the customer is applying to their purchase.
- **Receipt** – (Optional) Check off the button and enter the customers' email address if they would like to receive an e-receipt. If the email address is already populated and they decline an e-receipt, deselect the green checkmark.
- **Description** – Enter the Purchase/Repair Order number, plus any other relevant transaction notes, if applicable.
- Select **Redeem Loyalty** once all fields have been entered.

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## Redeem Loyalty

Purchase Amount (Optional)

\$

This field captures the invoice amount and it is used for reporting only.


Amount (Required)

\$

Receipt

☒

Description



Redeem Loyalty

- Once the transaction completes, a pop-up receipt will display.
- Select **Print** to have a copy printed and/or signed by the customer, or select **Close** to exit the pop-up.

### Dealership Rewards

Receipt

Date: 10-May-2017 16:22:43 EDT  
Transaction ID: 2243955599

Reference ID(s): 12345, 54321      Date: 10-May-2017 16:22:43 EDT

Cardholder Name: John Smith      Transaction ID: 2243955599  
Card Number: DLT200010

### Redeem Loyalty

Card Number: DLT200010  
Purchase Amount: \$259.00  
Amount: \$75.00  
Description: RO 678564

Balances  
Gift: \$0.00  
Loyalty: \$62.50  
Earned: \$62.50  
Promotional: \$0.00

Have a nice day!

Print
Close

- If you forget to print the receipt copy, you can retrieve the last transaction from the left-hand menu under **View Transactions** and selecting the **Print** button for the last transaction.

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## Transactions

DLT2 0001 0

Date	Transaction Number	Purchase Amount	Transaction Amount	Transaction Type	Location	Description	
10-May-2017 15:23	2379125800	\$125.00	\$12.50	Loyalty Fund	SERVICE	54321 -- Automatic Linked Loyalty Transaction --	
10-May-2017 15:23	2378436500	\$125.00	\$6.25	Loyalty Fund	SERVICE	54321	
10-May-2017 15:22	2230588020	\$25.00	\$25.00	Promo Loyalty Fund	SERVICE	As per lost customer mail piece promotion	
10-May-2017 15:14	1434241031	\$125.00	-\$25.00	Promo Loyalty Redeem	SERVICE	123456	
10-May-2017 11:07	7289593900	\$100.00	\$100.00	Promo Loyalty Fund	SALES	Deal # 123456	
09-May-2017 17:33	3333936905	\$50.00	\$50.00	Promo Loyalty Fund	Head Office		
09-May-2017 17:25	2551535269	\$50.00	\$50.00	Promo Loyalty Fund	SERVICE		

## **BEST PRACTICES FOR A SUCCESSFUL REWARDS PROGRAM**

- **PROMOTE ENROLLMENT**

- **Consistency!** Ask every prospect and paying customer if they are a member yet.
- If not already on the program, **ask customers to join & educate them** on how it works & what's in it for them.
- Keep **point-of-purchase materials** well-stocked on displays and that rewards brochures are in the hands of every new customer prospect & first-time visitors to Service.

- **ALWAYS CHECK THE REFERENCE ID (CUSTOMER NUMBER)**

- Search for the **Customer Name** or **Customer Number** in Ackroo to see if they are a member yet. Ensure the **DMS Customer Number** is accurately linked to their account profile:

Lookup New Card

---

Customer

---

*Card Number*  
**DLT2 0001 0**

*Registered to*  
**John Smith**

*Reference ID*  
**12345 (TOYOTA DEALERSHIP)**

*Communications Consent*  
**Yes**

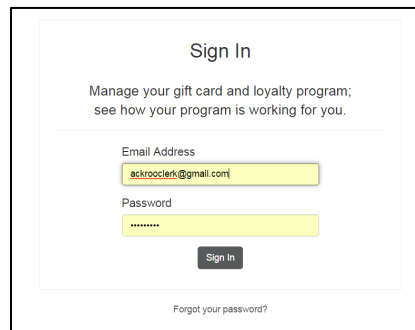
- **CHECK REWARDS ON EVERY VISIT**

- **Check Balances** for the coming days' service appointments and make note of the customers rewards balance on the work order.
- Use the Rewards balance to **overcome price objections** and sell additional services that are commonly declined (i.e. Wheel alignment, tire rotation, etc.).
- **Replace discounting** and instead apply customer rewards to the invoice—Maintain higher revenues and sales commissions.

## USING THE VIRTUAL TERMINAL – ADVANCED / MANAGER ACCESS

### LOGGING IN

- If you are a department- or business-level administrator, you will have additional menu permissions available when signing in.
- When you sign in to <https://vt.ackroo.com> and enter your email and password, you will be presented with different menu/department options.
- Locate the appropriate **Location/Department** as applicable (Sales, Service, etc) and the **Management** menu profile and Select **Access**.



Sign In

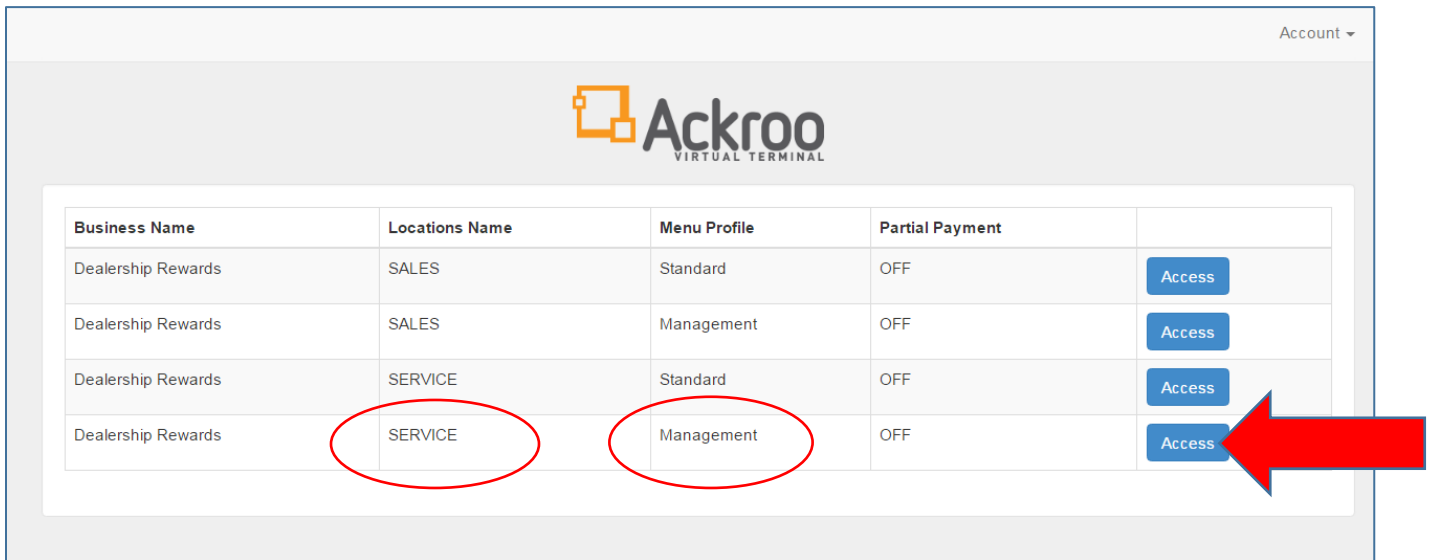
Manage your gift card and loyalty program;  
see how your program is working for you.

Email Address  
ackrooclient@gmail.com

Password  
\*\*\*\*\*

Sign In

Forgot your password?



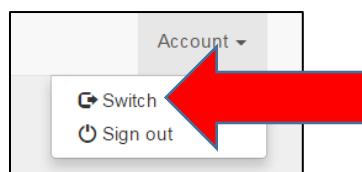
Account ▾

**Ackroo**  
VIRTUAL TERMINAL

Business Name	Locations Name	Menu Profile	Partial Payment	
Dealership Rewards	SALES	Standard	OFF	<a href="#">Access</a>
Dealership Rewards	SALES	Management	OFF	<a href="#">Access</a>
Dealership Rewards	SERVICE	Standard	OFF	<a href="#">Access</a>
Dealership Rewards	SERVICE	Management	OFF	<a href="#">Access</a>

### SWITCH DEPARTMENTS/MENUS

- If you need to change departments or menu profiles, you can select the **Account** drop-down menu at the *top right* of the page, and select **Switch** to return to a list of options.



## SEARCH CRITERIA

- From the Search Criteria page, search for a rewards card or customer account by the following options:
  - **Card Number** (Ex. DR1000001)
  - **First Name and/or Last Name** (Ex. John Smith)
  - **Reference ID / DMS Customer Number** (Ex. 23535)
  - **Ackroo ID** (Ex. 001-12345)
- When you access the customer account menu, the **Management Menu** will have additional menu buttons available:



## TRANSACTION MENU LAYOUT

**Fund Gift** – Load a card with Gift dollars purchased by the customer.

**Redeem Gift** – Spend Gift dollars to apply to a customer purchase.

**Earn Loyalty** – Manually add a rewards transaction (percentage earned) based on total spend amount on a customer purchase/repair order.

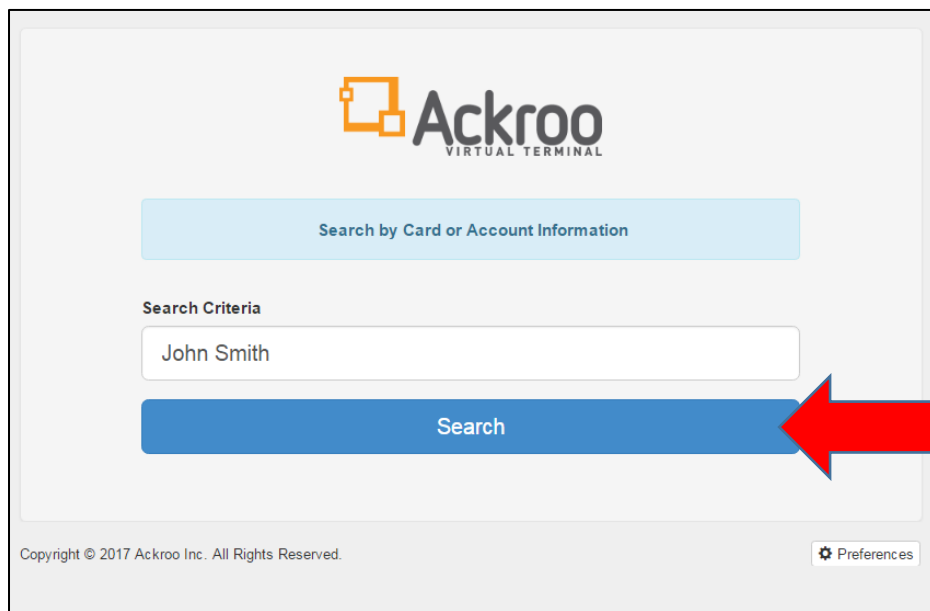
**Redeem Loyalty** – Redeem any loyalty and/or promo rewards and apply to a customer purchase/repair order.

**Fund Promotion** – To add a fixed \$ bonus to the customers' account (Ex. Referral Bonus)

## **EARN LOYALTY (MANUALLY ADD REWARDS TO A CUSTOMER ACCOUNT)**

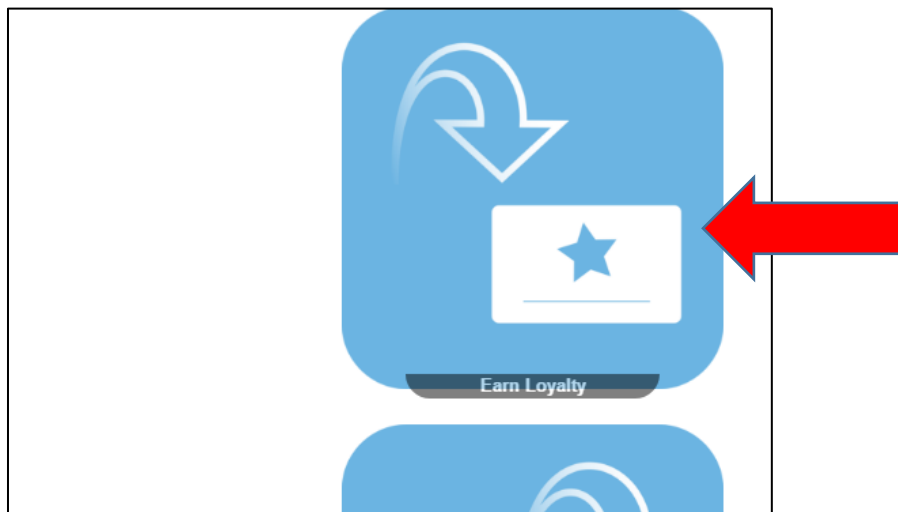
**NOTE: Delayed Registration** – If a customer was not enrolled and their DMS number (Reference ID) was not registered to a card **WITHIN 5 DAYS** of completing their Repair/Purchase Order, the Ackroo system will not process any Loyalty Rewards for the purchase.

- Card registration beyond 5 days of purchase will require a manual 'Earn Loyalty' transaction to be completed in order for loyalty earnings to be manually added
- From the Search Criteria page, search for an existing rewards customer by their DMS customer number, First and/or Last Name, Card Number or Ackroo-ID number. (Ex. John Smith)



The screenshot shows the Ackroo Virtual Terminal interface. At the top is the Ackroo logo with the text "VIRTUAL TERMINAL" below it. Below the logo is a light blue button labeled "Search by Card or Account Information". Underneath this is a section titled "Search Criteria" containing a text input field with the value "John Smith". Below the input field is a large blue button labeled "Search". A red arrow points to the "Search" button. At the bottom left, there is a copyright notice: "Copyright © 2017 Ackroo Inc. All Rights Reserved." At the bottom right, there is a "Preferences" link with a gear icon.

- Select the **Earn Loyalty** menu option.



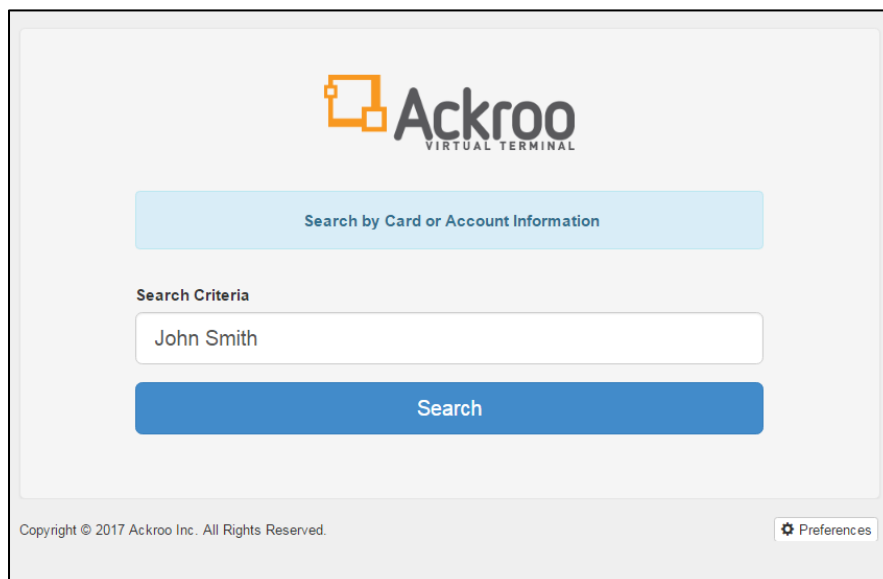


- **Amount** – Enter the Total PRE-TAX amount which the customer is paying on their invoice/order.
- **Receipt** – (Optional) Check off the button and enter the customers' email address if they would like to receive an e-receipt. If the email address is already populated and they decline an e-receipt, deselect the green checkmark.
- **Description** – Enter the Purchase/Repair Order number, plus any other relevant transaction notes, as applicable.
- Select **Earn Loyalty** once all fields have been entered.

- Once the transaction has been submitted, a pop-up receipt will display. Select **Print** to have a copy printed and/or signed by the customer, or select **Close** to exit the pop-up.

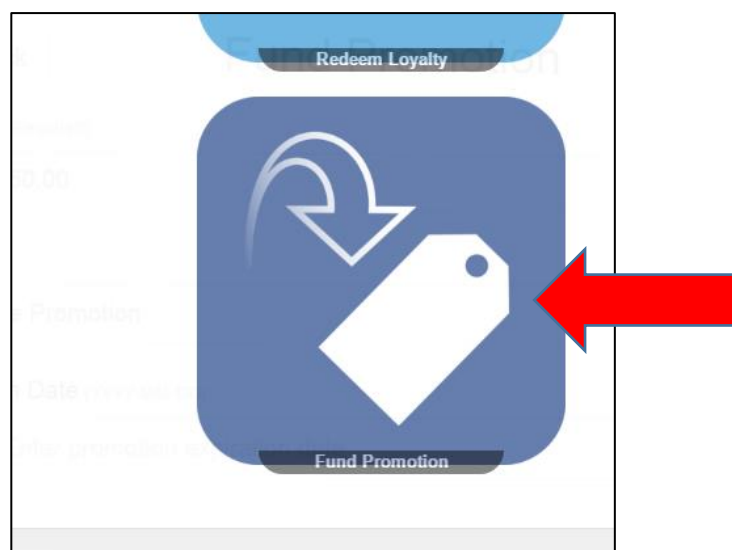
## FUND PROMOTION – ADD BONUS REWARDS

- Customers may be offered additional Loyalty Rewards over and above the standard cash-back rewards campaign. Examples may include:
  - *Customer Service Exception*
  - *Sales/Service Bonus*
  - *Referral Bonus*
  - *Limited-time offers (Ex. Radio or email campaigns)*
- From the Search Criteria page, search for an existing rewards customer by their DMS customer number, First and/or Last Name, Card Number or Ackroo-ID number. (Ex. John Smith)



The image shows a screenshot of the Ackroo Virtual Terminal interface. At the top, the Ackroo logo is displayed with the text "VIRTUAL TERMINAL" underneath. Below the logo is a light blue button labeled "Search by Card or Account Information". Underneath this button is the "Search Criteria" section, which contains a text input field with the value "John Smith". Below the input field is a blue button labeled "Search". At the bottom of the page, there is a copyright notice: "Copyright © 2017 Ackroo Inc. All Rights Reserved." and a "Preferences" link with a gear icon.

- Select the **Fund Promotion** menu option.



- **Amount** – Enter the Total BONUS \$ amount which the customer is being awarded.
- **Promo Tag** – From the drop-down menu, select the appropriate descriptive Tag. (Ex. Service Promo)
- **Expiration Date** – (Optional) Select the date field and use the calendar tool to select a desired end date that the promotional funds should expire off the account. Once set, the bonus will automatically be deleted off the balance as of the date selected.
- **Receipt** – (Optional) Check off the button and enter the customers' email address if they would like to receive an e-receipt. If the email address is already populated and they decline an e-receipt, deselect the green checkmark.
- **Description** – Enter the Purchase/Repair Order number, plus any other relevant transaction notes, as applicable.
- Select **Fund Card** once all fields have been entered.

◀ Back

Fund Promotion

Amount (Required)

\$

50.00

Tag

Service Promotion

Expiration Date (YYYY-MM-DD)

📅

Enter promotion expiration date

Receipt

✓

jsmith1901@gmail.com

Description

📄

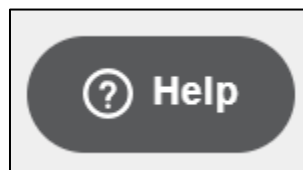
Radio Marketing Campaign - JUNE

Fund Card

- Once the transaction has been submitted, a pop-up receipt will display.
- Select **Print** to have a copy printed and/or signed by the customer, or select **Close** to exit the pop-up.

### **NEED support?**

- **LOOK FOR THE “? Help” ICON ON THE BOTTOM CORNER OF THE PAGE. SEARCH FOR POPULAR ANSWERS, OR SELECT “LEAVE US A MESSAGE” TO OPEN A SUPPORT TICKET.**



- **OR, CALL [1-855-880-5017](tel:1-855-880-5017) OR EMAIL [SUPPORT@ACKROO.COM](mailto:SUPPORT@ACKROO.COM).**  
(SUPPORT HOURS: MON-FRI, 8:00AM TO 8:00PM EST)