

ADMINISTRATOR ROLES & ACCESS

PROGRAM Administrator (PA) – Visibility of ALL businesses & locations within the program.

BUSINESS Administrator (BA) – Visibility of assigned business only.

LOCATION Administrator (LA) – Visibility of assigned location/department only.

READ-ONLY Administrator (CLERK) – Visibility of assigned location only – Read-only, editing privileges restricted.

		PA	BA	LA	CLERK
DASHBOARD <i>(Program Stats)</i>	See "Overview" for assigned location – <i>Gift/Promo/Loyalty Liability, Card Inventory, Transaction Plan</i>	✓	✓	✓	✓
	See "Trends" for assigned location – <i>Total Funded & Redeemed, Transaction averages by Day, Month, Year</i>	✓	✓	✓	✓
	See "Transaction Insights", "Customer Insights" and "Location Comparison" trends for the full Program	✓			
BUSINESSES/LOCATIONS	View List of assigned Businesses/Locations - <i>Suspend or Edit location Name, Timezone or enable/disable clerk authentication</i>	✓	✓		
TRANSACTIONS /eCOMMERCE	View, Filter and Search Detailed Transaction reporting for assigned location(s)	✓	✓	✓	✓
	View, Filter and Search Summary reporting for assigned location(s)	✓	✓	✓	✓
	Export Filtered Transaction Details and/or Print Summary of Filtered Data for assigned location(s)	✓	✓	✓	
	Reverse or Adjust Transactions and Edit Description for assigned location(s)	✓	✓	✓	
	eCommerce – View all eGift orders (Completed or Expired)	✓	✓		
	eCommerce – Edit eGift Purchaser & Recipient email addresses	✓	✓		
	eCommerce – Re-Send eGift email copies to Purchase & Recipient	✓	✓		
CARDS <i>(Customer Accounts)</i>	View, Filter and Search all card inventory	✓	✓	✓	✓
	View single "Card Details" Summary Page – <i>Registration Info, Balances, Transaction Activity to date</i>	✓	✓	✓	✓
	Edit Cardholder Profile - <i>Basic contact info, Opt-In consent, Unregister Card</i>	✓	✓	✓	
	Change Card State – <i>Block or Unblock a single card (deactivation)</i>	✓	✓		
	Manage Balance – <i>Fund PROMOTIONAL dollars on a single card</i>	✓	✓		

	Manage Balance – <i>Clear LOYALTY dollars on a single card</i>	✓	✓		
	Manage Balance – <i>Expire PROMOTIONAL dollars on a single card</i>	✓	✓		
	Manage Balance – <i>Transfer funds card-to-card</i>	✓	✓		
	Manage Balance – <i>Issue and/or Fund GIFT dollars on a single card</i>	✓			
	Change Card State – <i>Issue or Unissue a single card</i>	✓			
	Change Card State – <i>Destroy a single card (permanent action)</i>	✓			
	BULK Card Actions – <i>Perform all the above to a range of multiple cards</i>	✓			
CAMPAIGNS <i>(Loyalty)</i>	Configure Basic Loyalty Campaigns for assigned business/location(s)	✓	✓		
	Configure Advanced Loyalty Campaigns for all business/locations(s)	✓			
	Configure Scheduled (time-based) campaigns for all business/locations(s)	✓			
REPORTS	Configure Reports and Data pertaining to assigned business/location(s) only	✓	✓		
	Configure ALL Report types for the Full Program	✓			
POINT-OF-SALE	Generate a 6-digit terminal activation Pin (pin.ackroo.com)	✓	✓	✓	
	View, add, edit or suspend physical or virtual point-of-sale terminals for assigned location(s)	✓	✓	✓	
	Add, Edit or Suspend Clerk / employee IDs for assigned location(s)	✓	✓	✓	
	Add, Edit or Suspend terminal Receipt and Menu profiles for assigned location(s)	✓	✓	✓	
	Manager Access (Funding permissions) in a Virtual Terminal (vt.ackroo.com) for assigned location(s)	✓	✓	✓	
	Basic Access (Redeem Only) in a Virtual Terminal (vt.ackroo.com) for assigned location(s)				✓
SETTINGS	Manage Users – <i>Create, suspend and reassign Business/Location admins (within their business & location)</i>	✓	✓		
	Configure or edit Loyalty Settings for assigned Business(es) – <i>Add Redemption \$ Threshold, enable/disable Earning on Gift Redemption, enable/disable Registration requirement</i>	✓	✓		
	Transfer Program Ownership (“Program Owner” only)	✓			
	Manage Advanced Settings – <i>Card Transaction Limits, Card number masking, Banking info, Units and Promotion Tags</i>	✓			