WebTerminal Quick-start Guide

Welcome to WebTerminal! You are set up with the username and password that you requested and are now ready to start processing gift and/or loyalty transactions. WebTerminal is easy to use —just follow the steps below to get started.

Logging In

Bookmark the Web Address
Direct your web browser to https://smarttransactions.net/patron

This will present you with the merchant login screen—bookmark this page for quick access.

Log In
Enter your user name and password and click the "Log In" button.

Set Preferences
Click the "Configuration" tab to customize your WebTerminal and design your receipt header.

Done!
You're ready to start processing gift and/or loyalty transactions.

Tips

▪ The default transaction is a Sale (deduct value from a card.) To activate or add value to a card, click the "Credit/Activation" tab.

▪ To check the balance on a card, click the "Inquiry" tab.

▪ WebTerminal is designed so that you don't have to use your mouse to enter a transaction, unless you want to. Press the tab button on your keyboard to move between fields. Pressing Enter on the keyboard is the same as clicking the "Process" button.

▪ WebTerminal is compatible with all major brands of mag-stripe readers. Keyboard "wedge" style readers are the most common type and are usually less than $75 each. The ID Tech MiniMag Swipe Reader is an inexpensive model that works well. POSGuys.com often has the best price on this product, but it is also available from many other POS systems providers. The readers are very easy to install—just plug them into your computer.

▪ Use the Configuration Wizard if you ever need to change your password or add additional users.

Transferring Card Balances through Web Terminal

Click the "Batch Maintenance" tab. Select the "Card Replacement" tab. Enter the old and the new number and click process. The message "Account Transfer Complete" will appear after a successful card replacement. If any other message appears, the transfer did not go through. Feel free to call 888-494-9760 x5 if this happens.

WebTerminal Reporting Options

Transaction reports are now available for a single merchant location for any single day via WebTerminal.

- ▪ You must be signed up for Web Terminal.
- ▪ You must use Internet Explorer for it to work.
- ▪ Allows you to see transaction reports by day for both gift and loyalty.
- ▪ Choose 'Reports' from the tab on the left on the main page.
- ▪ Insert date in format: MM/DD/YYYY
- ▪ Allows you to view voided transactions.
- ▪ Allows you to look up card balances and card history of transactions

Note: If you would like to use WebTerminal for reporting only, and disable transaction processing capabilities. Log in as an administrator and uncheck the gift and loyalty check boxes under the "Configuration" tab. **Important:** Once this has been changed it can **not** be changed back. A new web terminal with a new log in information must be created.

Checking Card Balances Without WebTerminal

Balance Checks by Phone

1-888-303-1175.

Gift Card Balance Only

https://www.smart-transactions.com/giftcardbal.html

Gift Card Statement / History

https://www.smart-transactions.com/GiftCardStatement.html

Loyalty Card Point Balance

https://www.smart-transactions.com/LoyCardSummary.html

Loyalty Card Statement

Cash & Points
https://www.smart-transactions.com/GetLoyaltyCardStatement2.html

Points Only
https://www.smart-transactions.com/GetLoyaltyCardStatement.html

WebTerminal Compatible Receipt Printers

WebTerminal requires a graphics-capable printer. Unfortunately, this means that you can't print receipts using an old dot-matrix style receipt printer. We have done extensive testing with the *Ithaca POS Jet 1000,* and the Epson TM-88iii and both models work very well. You can find more information on both models at POSGuys.com and other online POS equipment companies. Most normal 8.5" x 11" inkjet or laser-jet printers will work, but this may not be the most efficient use of paper. We have tested and certified the following printers (in graphics mode) with WebTerminal:

Make	Model
Epson	TM-88iii
Ithaca	POS Jet 1000
Ithaca	POS Jet 1500
Star Micronics	TSP700
Star Micronics	TSP800

You'll also need to configure the printer page setup in your web browser.

For most web browsers this is a simple process. Go into the "page setup" option under the 'file' menu and set the left and right margins to 0.15 inches. Be sure and clear the header and footer print options too. Here's an example of the page setup screen in Microsoft Internet Explorer (yours may not look exactly like this):