Congratulations on your enrollment in Ezpoints! You will soon find out how simple it is to manage and track your points program. Please follow the step-by-step instructions in this guide and you'll be under way in minutes.

<u>Installation</u>

1. Make sure the computer you are installing the Ezpoints reader to is connected to the internet. If in doubt, open the program known as Microsoft® Internet Explorer and type in the following address: <u>www.ezpoints.net</u>. If your browser opens the Ezpoints home page you are connected.
2. Unpack the magnetic stripe reader (Fig A.). You will find one 'male' (Fig B.) and one 'female' (Fig C.) RS232 keyboard connector.
3. Unplug the keyboard from your computer and plug the 'male' end of the card reader into the computer. (Fig D.)
4. Plug the keyboard into the 'female' connector on the card reader. (Fig E.)

| Figure A. | Figure B. | Figure C. | Figure D. | Figure E. |

If you hear a beep and a green light appears on the reader the installation should be complete. If not you may lose the ability to communicate through your keyboard in which case use your mouse to re-start the computer. The reader should beep and the green light be lit.

<u>Using the program for the first time</u>

It is important to test the communications of your system before you begin to process transactions. To do so, please run the following test.

1. Open a web browser such as Microsoft® Internet Explorer.
2. Type in the address <u>www.ezpoints.net</u>
3. Select the link to <u>Transactions</u>
4. Scroll down and select the link to <u>Balances</u> (both pages should have loaded after the links were selected. See Troubleshooting if not)
5. Once more select the link to <u>Transactions</u>
6. In the browser click on File -> Send -> Shortcut to Desktop (This will create an icon on your desktop to double click for fast access to the points transaction page)
7. Return to the Transaction Page.
8. Click on the form field at the top labeled 'Credit/Debit Points'
9. Type in the number '5' and hit the Tab key on your keyboard
10. Type the word 'test' into the field Transaction Number and hit Tab.
11. You may or may not choose to enter an email address. Press Tab.
12. Using a card with a magnetic stripe on it, swipe it through the reader and wait a few seconds for it to process. You should be re-directed to a screen that confirms the transaction and that 5 points were entered.
13. Click on the link 'Return to Transactions"
14. Repeat steps 8 through 13 one more time only enter '-5' (a debit) into the 'Credit/Debit Points' field.

15. Once you've returned to the Transactions Page, click the link to the Balances page.
16. Click on the gray field at the top of the page to the left of 'Submit Query'
17. Swipe the same card used in steps 8-13 and allow a few seconds for the transaction to complete.
18. If successful you will see both transactions in detail in the form below, you are now ready to begin awarding and tracking points! If only one or neither transaction is present please refer to Troubleshooting.

Balances

Balances can be accessed for your customers only if their card is present. Partial names, email addresses and transaction numbers cannot be accessed without contacting us via email. Balances for your business are accessible using an 8 digit code entered into the balances form. This code will be supplied to our contact person. It allows you to see your total outstanding points liability. Detailed transaction reports are available upon request.

Important Information

Ezpoints is a web-based service provider that relies on our network servers as well as your internet access provider. While technology has helped to increase 'up time' in recent years, you may experience occasional 'down times' where your provider or our server does not allow you to connect. If 100% up time is crucial to your program you may wish to consider software that installs directly into your computer. We have such software, however it is far more expensive that the web based service and also has it's drawbacks. It is not easily updated and if your computer fails, it does as well. If you find connectivity an issue, we would be glad to discuss software options with you. For the most part we recommend that you start your points / rewards program with relatively small rewards that won't have your customers overly concerned if a transaction can't complete. Our servers are up 99.9% so if your service provider is reliable, there should be very few missed transactions. You may choose to have a manager make a note and sign the customer's receipt so you can enter the points on their next visit. As with anything there may be occasional situations that need special handling. Most of our clients have very few issues to report.

One issue that will arise from time to time is that of lost cards. Should a person lose their card there are two ways to ensure that we can transfer their points to a new card.

1. Enter their email address with their first transaction.
2. Enter their first and last name in the 'Transaction Number' field with their first transaction.

Should the customer elect not to give you either of these pieces of information, simply make them aware that should they lose the card, so go the points just as if they lost a gift card or cash.
If they do give you either of these pieces of information, you can email us (there is a link on the Transactions Page) the particulars and we can merge their point totals. You may then process a new transaction with their new card of choice and make sure to enter the same piece of information in either the 'email' or 'transaction number' forms as they used with their old card. An update may take a few days but in most cases is possible. If a new State Driver's License is issued to them this may also be seen as a new card to the program (depending on the State). It is important that you be aware of these issues as they can arise from time to time.

Security is something we take very seriously, however no web-based service is 100% secure. Hackers are able to do very malicious things and while we backup and protect all

of the information, we cannot guarantee there may not be attempts to alter the information. If you suspect someone has obtained points they did not earn please contact us. We can trace where the data was entered and whether or not an outside entry was made. We suggest posting a disclaimer on-site that exempts you from certain liabilities. We also strongly suggest using incentives in your program that will not be likely to motivate fraudulent activities. While our competitors charge thousands of dollars, we are able to offer 95% of what they can for hundreds. Please govern your program accordingly or call us if you'd like a more secure solution.

<u>Which cards to accept</u>

Although our program will work with almost any magnetically striped or barcoded card (with optional barcode reader), we recommend that you try to stay consistent in the cards you use. A Driver's License is the best choice for a number of reasons. First, it contains no financial information on it. Secondly, in most States it does contain valuable mailing information you may choose to access. Thirdly, most contain some portion of a name and are able to be searched for in the event they lose their license or their new one does not match the old. We strongly discourage credit card usage and most of your customers will probably agree. Our readers are designed to read incomplete credit card information however helping to cut down any potential fraud issues and eliminating card cloning. Debit cards are safer because they have PIN numbers that are not encoded on the card so the cards are more secure. Wholesale membership cards are a good choice because they have sufficient information and they have no link to financial information. With an optional barcode reader, any grocery or pharmacy key fob will work just fine as well. Should you find, due to your industry, that people are not taking part in the program because of identity theft fears, we can supply you with barcoded key fobs at wholesale pricing to help boost your enrollment. Avoid using non-brand name cards or library cards as they may contain such little information that conflicts can occur with other customer accounts. Gym cards are also a less desirable choice. If in doubt, call us for more information.

We are certain that you will find this program has all of your needs covered. If you have any suggestions or would like something tailored more to your needs please let us know and we will work with you to find a solution.

<u>Troubleshooting</u>

Keyboard / Reader not working

- Check connections
- Re-start computer
- Call/Email for assistance

May not work with other shared devices or KVM switches.

Can't access Ezpoints.net
or transactions/balances
pages won't load.

- Check internet connection
- Retry in 5 minutes

Web server may go down from time to time. This is normal on some occasions

Balances do not equal transactions

- Balances are updated 24-48 hours after last transaction. Transactions entered after this can be calculated manually if necessary.
- Call/Email for assistance if transactions prior to the last update are not correct.

Can't find previous transactions

- Make sure the card is the same used in prior transactions.
- If it is a Driver's License make sure it is not recently renewed.
- Email us a detailed account of the incident and we will attempt to rectify the issue.