

BayIQ - Two-Way Integration AV Ref # 714

How To Register / Lookup Rewards Customers:

When using the BayIQ integration within HITS, a customer will either be a:

1. Registered BaylQ customer. If the customer is already registered with BaylQ, the Rewards button will be green. By clicking the Rewards button, you will see all available Rewards Points and Promotions available for the customer.



 Non-Linked BaylQ customer. For HITS users who have used BaylQ prior to using the two-way integration in HITS, you may have customers that are registered in BaylQ, but have not yet been *linked* to their HITS customer account.

If the customer is a BayIQ Rewards member, but has not yet been *linked*, the Rewards button will be red.

🔀 Rewards

After clicking the Rewards button, HITS will search the BayIQ system with the customer's phone number and email. If the customer is found in the BayIQ system, you can double-click the customer to link their BayIQ Rewards account to their HITS' customer account. (After doing so, you will be able to see their available Rewards Points and Promotions in HITS.)

| Big Find BayIQ Rewards Customer × | | | | | | | | |
|-----------------------------------|--|------------------------------|-----------------|--------------|--|--|--|--|
| Double-Click A Customer To Select | | | | | | | | |
| Rewards Phone, Email, or Name | | | | | | | | |
| Find Customer Cancel | & Return To Register Customer Suggest He | elp | | | | | | |
| | | | | _ | | | | |
| | Double-Click A Rewar | eds Customer To Link To BPOS | | | | | | |
| Name | Email | Phone | Card | | | | | |
| Bob Smith | info@gmail.com | (330) 792-1957 | 035694907578234 | | | | | |
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3. Non-Registered Customer. If the customer is not a BaylQ Rewards member, the Rewards button will be red.

🔀 Rewards

After clicking the Rewards button, HITS will search the BayIQ system with the customer's phone number and email.

If the customer is not found in the BayIQ system, you will have the option to perform a secondary search in the BayIQ system in case the customer is registered with a different phone number or email.

If you do not want to perform a secondary search, you can click the "Cancel & Return To Register Customer" button (see below.)

| Find BayIQ Rewards Customer No Matching Customer Found - The Following Searches Have Already Been Performed | × | | | | | | | |
|--|---|--|--|--|--|--|--|--|
| No Matching Customer Found - The Following Searches Have Already Been Performed | | | | | | | | |
| | | | | | | | | |
| (707) 998-9658 jane.smith303@gmail.com | | | | | | | | |
| Enter Customer Phone, Email, or Name and Press the Find Customer Button | | | | | | | | |
| Rewards Phone, Email, or Name | | | | | | | | |
| Find Customer Cancel & Return To Register Customer Suggest Help | | | | | | | | |
| | | | | | | | | |
| Double-Click A Rewareds Customer To Link To BPOS | | | | | | | | |
| Name Email Phone Card | | | | | | | | |
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After clicking the "Cancel & Return To Register Customer" button,

- a. Enter **Employee Id**
- b. Enter the **Physical BaylQ Card** (optional)
- c. Select the **Customer Type** (required)
- d. Click the "Register Customer" button.

| 🗒 Register BaylQ Customer | | | × | | | | | | |
|--|---|----------------------|-------|--|--|--|--|--|--|
| The HITS BPOS customer has *NOT* been linked to a BaylQ Rewards account | | | | | | | | | |
| Customer Name: JANE SMITH (103354) | | | | | | | | | |
| Rew | Rewards Name: Rewards Phone: Rewards Email: Rewards ID: Rewards Card: vards Customer Type: | | | | | | | | |
| Employee ld: Physical Card (Optional): | STEVE (5) V | | | | | | | | |
| Customer Type (Required): | Retail | | | | | | | | |
| Customer Rewards | | | | | | | | | |
| Reward | Туре | C | Code | | | | | | |
| NO REWARDS AVAILABLE | Points | | 0 | | | | | | |
| TIP: REWARDS are applied using A | ADJUST TOTAL or ADJUST I | TEMS during ticket e | edit. | | | | | | |
| Available REWARDS, if any, are listed on the Rewards pulldown. | | | | | | | | | |
| | | | | | | | | | |

After registering the customer, the customer will be enrolled in the BayIQ system and going-forward, any Invoices for the customer will update their BayIQ account.

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4. Customer has Declined Rewards Program. If a customer has declined the Rewards program, the Rewards button will be pink. If the customer changes their mind, they can still be registered for Rewards by clicking the Rewards button and following the registration process.

D Rewards

How To Apply Rewards:

Rewards and Promotions must be applied to a Workorder through either the "Adjust Items" or "Adjust Total" button on the LINE ITEMS tab of the Workorder.

| BPOS Applica | ation | | | | | | | | | | | - 0 | \times |
|--|---|---------------------------------------|-----|------------------------------------|--------------------------------|--------------------------------|--------------|------|---------------|------------------|----------|------------|----------|
| File Views Appoin | He Views Appointments Tickets Inventory Customers Contacts Vehicles VSR Suppliers Links Set Store Help | | | | | | | | | | | | |
| Clear Appt Tick | new April Tokan Kater Warnerer Umer Kater | | | | | | | | | | | | |
| LOGIN: AATECH VIEW: SALES CO | UNTER | | c | STORE NAME: MAY USTOMER: GUY SM | VERICK TIRE (ILEY (101491) | AUTO (DEMO) VEHICLE: STORE: | 1 | | | | | DEFAULT ST | TORE: #1 |
| Ticket View/Edit | (102240) | | | | | | | | | | | | |
| Main Line Items | Appointments/Status | s Customer Info Vehicle Info Payments | | | | | | | | | | | |
| Ref# | Product # | Description | Qty | Unit Price | Unit | Amount | Tech | Dept | Price Code | Tax Code | Salesrep | Status | |
| 1000 | 001405 | 2156016 FIRESTONE FIREHAWK AS | 4.0 | 82,6500 | | 330.60 | HOUSE | 0 | 1 | 1 | ART | | ~ |
| 1004 | VALVE | VALVE STEMS | 4.0 | 1.0000 | | 4.00 | HOUSE | 4 | 1 | 1 | ART | | |
| 1006 | DFT | ENVIRONMENTAL DISPOSAL FEE | 4.0 | 1.0000 | | 4.00 | HOUSE | R | 1 | 0 | ART | | |
| 1010 | DRH | DECLINED ROAD HAZARD WARRANTY | 1.0 | 0.0000 | | 2.04 | HOUSE | Z | 0 | 0 | ART | | _ |
| | | 1000 | 315 | Teler OP | 112 58 | 100 CD2 100 | 10 Store GPS | | enta . | 471 04 Solar Tay | 20.06 | of Total | 441 12 |
| Line Line States for Tech Set Separater Set Tech Set Sets Set Vendor He Inter Hotery Return Goods Toge Day Autorsze Vons Clear | | | | | | | | | | | | | |
| | Outcomer View Full View Extension Costomer History Cutt Value Index Vehicle History VSR'ss Adjust Total Image Total | | | | | | | | | | | | |

Available Rewards and Promotions will appear in the BaylQ Rewards pull-down. Simply select the correct option and the "Adjust Ticket Price" button. The Reward Discount will appear on the ticket as a line item.

| Adjust Ticket Price *** BETA *** | | | | | | |
|---|--|------------------------------------|--|--|--|--|
| BaylQ Rewards | CUSTOMER HAS REWARDS!!! ~ | | | | | |
| Discount Type | CUSTOMER HAS REWARDS!!! | JNT (PCD!) V Show Hidden | | | | |
| Description | REWARDS DOLLARS = 17.68 this is a promotion | | | | | |
| Current Price | \$25 Off Any Service | | | | | |
| Target Price | Free Alignment Check | | | | | |
| Targ | S10 Off Any Service | rcent Discount 🔘 Warranty Discount | | | | |
| Target Price Is Before Sales Tax | | | | | | |
| NOTICE: If PCDI item is TAXABLE, Adjusted Price may be off by +/- \$.01. If non-taxable adjustments are permitted, set PCD! to non-taxable in the Inventory Master File. The symbol "###" in Description will be replaced by the adjustment amount or percentage. The symbol "@@@" in Description will be replaced by the word "Ticket". | | | | | | |
| Adjust Ticket Price Cancel Help? | | | | | | |

III Before closing a ticket, if the customer has pending Rewards points, the system will warn you that the customer has available Rewards.