



FUTURA REWARDS CREDITING SYSTEM

(FRCS v4.0)

STAFF USER GUIDE

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1. INTRODUCTION

1.1 IDENTIFICATION

The Futura Rewards Crediting System (FRCS v4.0) shown in Figure 1.1 is a self-contained multi-user web application that provides Merchants (Partners) the ability to credit Futura Rewards to Futura Member accounts via the internet.

1.2 PURPOSE

This User Guide provides step-by-step instructions on using the various features contained within the FRCS application.

1.3 DOCUMENT CONVENTIONS

Text that is in ***Bold Italics*** is meant to identify content coming from the applications, for example: “user must click the ***Login*** button”.

Figure 1.1

The screenshot displays the Futura Rewards Crediting System (FRCS v4.0) web application interface. The header includes the system name and a 'LOGOUT' link. Below the header, there are navigation links for 'CREDIT REWARDS', 'USERS', and 'REPORTS'. The main content area is titled 'MERCHANT 001' and features a 'CREDIT REWARDS' section. This section includes a note that an asterisk indicates a required field. The form contains several input fields: 'Merchant Location' (set to 'Merchant 001'), 'Store # 001', 'Futura Member ID' (with a dropdown for 'FT' and a masked input 'XXXX'), 'Member's Postal Code', 'Pre-Tax Trans Amt (\$)', 'Transaction Date' (set to 'Feb 07, 2012'), 'Base Offer Type' (set to 'Flat'), 'Flat Amount', 'Bonus Offer Type' (set to 'Custom'), 'Bonus Rewards', 'Internal Reference', and 'Member's E-mail'. Below the form, the 'Base Rewards' and 'Bonus Rewards' are both set to '0.00', and the 'Total Rewards' is '0.00'. A link 'Add Another Transaction' is provided. At the bottom, there are 'RESET' and 'SUBMIT' buttons. On the right side, there is a 'MESSAGE AREA' with the heading 'IMPORTANT THINGS TO REMEMBER' and three numbered instructions: 1. Always try to obtain the Member's email address; 2. Be sure to check whether your organization has any special or bonus offers in place; 3. Always remember to hit "SUBMIT" after each transaction.

2. LOGIN

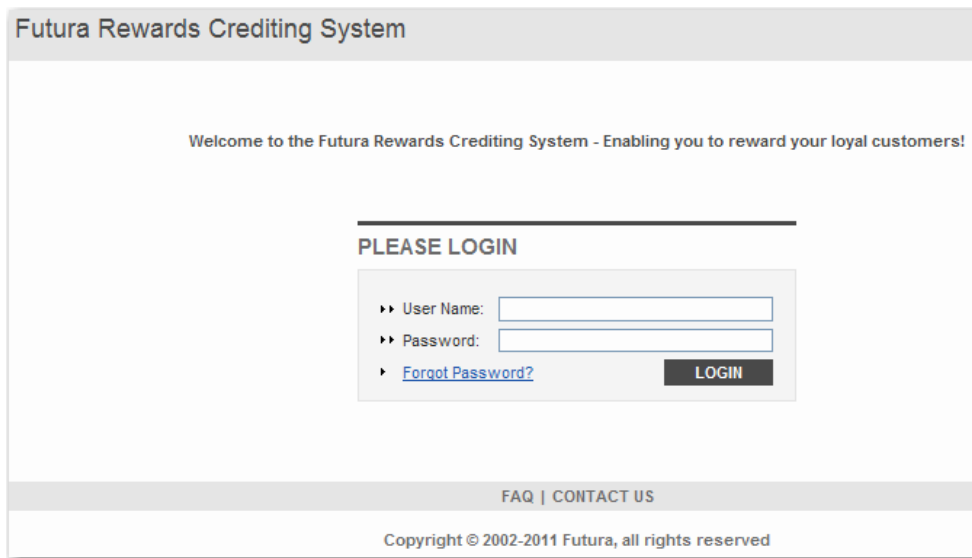
2.1 LOGIN TO THE FUTURA REWARDS CREDITING SYSTEM

1. Start your Internet Browser and navigate to the URL:

<https://services.futurarewards.ca>

2. The *Futura Rewards Crediting System Login* web page shown in Figure 2.1.1 will display.
3. Please enter your *User Name* and *Password* in the corresponding fields and click the *Login* button. Please note that these two fields are case sensitive (i.e. username “Test” is not the same as username “test” and password “B2a53e” is not the same as “b2a53e”).

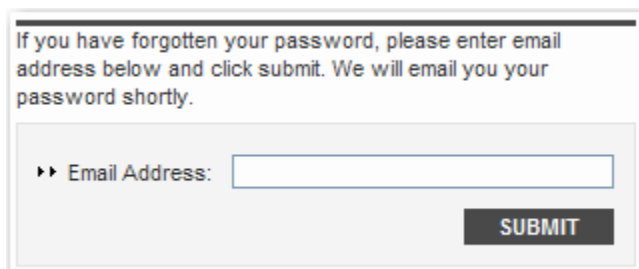
Figure 2.1.1



The screenshot shows the login page for the Futura Rewards Crediting System. At the top, it says "Futura Rewards Crediting System". Below that is a welcome message: "Welcome to the Futura Rewards Crediting System - Enabling you to reward your loyal customers!". The main section is titled "PLEASE LOGIN" and contains two input fields: "User Name:" and "Password:". There is a "Forgot Password?" link and a "LOGIN" button. At the bottom, there are links for "FAQ | CONTACT US" and a copyright notice: "Copyright © 2002-2011 Futura, all rights reserved".

4. If you have forgotten your password, click the “*Forgot Password?*” Button shown in Figure 2.1.1 and the page shown in Figure 2.1.2 will appear. Enter your email address and your password will be sent to you, but if it doesn’t match the *Email Address* found in the system, the errors shown in Figures 2.1.2.1 or 2.1.2.2 will display.

Figure 2.1.2



The screenshot shows the "Forgot Password" page. It has a heading that says: "If you have forgotten your password, please enter email address below and click submit. We will email you your password shortly." Below this is an input field labeled "Email Address:" and a "SUBMIT" button.

Figure 2.1.2.1

If you have forgotten your password, please enter email address below and click submit. We will email you your password shortly.

The E-mail Address entered is invalid.

▶▶ Email Address:

SUBMIT

Figure 2.1.2.2

If you have forgotten your password, please enter email address below and click submit. We will email you your password shortly.

Please fill-in your E-mail Address.

▶▶ Email Address:

SUBMIT

5. If you have successfully logged in, you will see the *Credit Rewards* page similar to the one shown in Figure 2.1.3.

Figure 2.1.3

Futura Rewards Crediting System LOGOUT

CREDIT REWARDS | USERS | REPORTS

MERCHANT 001

CREDIT REWARDS

* Indicates a required field

Merchant Location: - Store # 001

Futura Member ID: * FT xxxxx Member's Postal Code: *

Pre-Tax Trans Amt: (\$) * Transaction Date: *

Base Offer Type: Flat Amount *

Bonus Offer Type: Bonus Rewards:

Internal Reference: Member's E-mail:

Base Rewards: 0.00

Bonus Rewards: 0.00

Total Rewards: **0.00**

[Add Another Transaction](#)

RESET **SUBMIT**

MESSAGE AREA

IMPORTANT THINGS TO REMEMBER

1. Always try to obtain the Member's email address
2. Be sure to check whether your organization has any special or bonus offers in place
3. Always remember to hit "SUBMIT" after each transaction

3. CREDIT REWARDS

3.1 DESCRIPTION

The Credit Rewards screen has the ability to add multiple transaction items to the transaction record before submitting to Futura Rewards for processing.

3.2 HOW TO CREDIT REWARDS TO FUTURA MEMBERS

1. Select **Credit Rewards** from the menu shown in Figure 3.2.1 and a blank **Credit Rewards** page will display on the left side of the screen as shown in Figure 3.2.2.

Figure 3.2.1

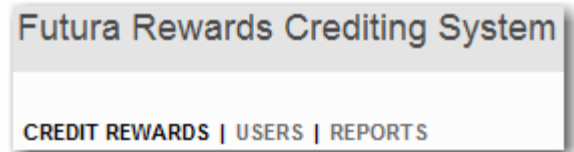


Figure 3.2.2

A screenshot of a web form titled "CREDIT REWARDS". Below the title, there is a note: "* Indicates a required field". The form contains several input fields: "Futura Member ID: *" with a text box containing "FT" and "XXXX", "Member's Postal Code: *" with an empty text box, "Pre-Tax Trans Amt: (\$) *" with an empty text box, "Transaction Date: *" with a date picker showing "Feb 16, 2012", "Base Offer Type:" with a dropdown menu showing "Flat", and "Flat Amount: *" with an empty text box.

2. Simply type in the Member's 9 digit Futura Rewards Number in the **Futura Member ID** field shown in Figure 3.2.2 from one of the many varieties of cards available as shown in Figure 3.2.3. A USB card reader can be used to auto-populate this field when the cursor is placed in the **Futura Member ID** field as shown in Figure 3.2.2 and swipe the Members Futura Rewards card through the card reader. If the field is left blank or contains invalid data, the error shown in Figure 3.2.32 will display.

Figure 3.2.3



3. Enter the Futura Rewards Member's postal code in the **Member's Postal Code** field shown in Figure 3.2.4. The postal code can be used to plot the geographic location of the shopper in relation to your Merchant's locations. If the field is left blank or contains invalid data, the error shown in Figure 3.2.33 will display.

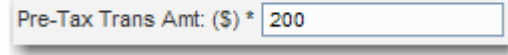
Figure 3.2.4



Member's Postal Code: *

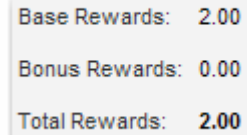
4. Enter the pre-tax transaction amount without dollar signs or commas (e.g. 100) in the **Pre-Tax Trans Amt (\$)** field shown in Figure 3.2.5. If the field is left blank or contains invalid data, the errors shown in Figures 3.2.36 and 3.2.35 will display.

Figure 3.2.5



Pre-Tax Trans Amt: (\$) *

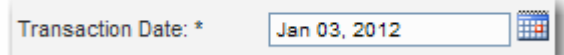
Figure 3.2.6




Base Rewards:	2.00
Bonus Rewards:	0.00
Total Rewards:	2.00

5. The **Transaction Date** field shown in Figure 3.2.7 always defaults to the current date, but if the actual transaction date is another date, you may change the date by clicking on the **Calendar Icon** and selecting the day (date of payment) from the pop up calendar.

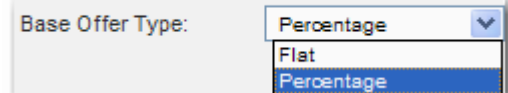
Figure 3.2.7




Transaction Date: * 

6. Select the appropriate Base Offer by clicking the **Base Offer Type** pull-down shown in Figure 3.2.8 and selecting one from the list (e.g. **Percentage** or **Flat**).

Figure 3.2.8



Base Offer Type: 

7. If a Base Offer Type of "Percentage" is selected, you must enter the percentage amount in the **Percent Amount** field shown in Figure 3.2.9. After entering a percentage in the **Percentage Amount** field, the **Base Rewards** and **Total Rewards** fields shown in Figure 3.2.6 will display with the applicable rewards based on the Base Offer Type, Percentage Amount and Transaction Amount entered.

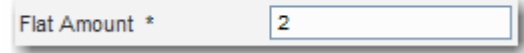
Figure 3.2.9



Percentage Amount *

8. If a Base Offer Type of "Flat" is selected, you must enter the flat amount in the **Flat Amount** field shown in Figure 3.2.10. After entering an amount in the **Flat Amount** field, the **Base Rewards** and **Total Rewards** fields shown in Figure 3.2.6 will display with the applicable rewards based on the Base Offer Type, Flat Amount and Transaction Amount entered.

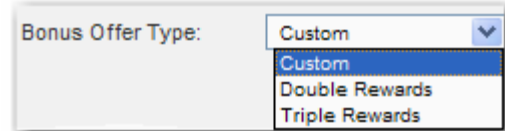
Figure 3.2.10



Flat Amount *

9. Select from the 3 types of optional Bonus Offers available (e.g. Custom, Double Rewards and Triple Rewards), by clicking the **Bonus Offer Type** pull-down shown in Figure 3.2.11 and selecting the appropriate Bonus Offer from the list.

Figure 3.2.11



A pull-down menu labeled "Bonus Offer Type:" with a dropdown arrow. The menu is open, showing three options: "Custom" (highlighted in blue), "Double Rewards", and "Triple Rewards".

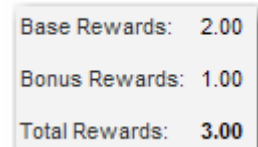
10. If a **Bonus Offer Type** of "**Custom**" is selected (default), you can either enter the bonus value in the **Bonus Rewards** field shown in Figure 3.2.12, leave the field blank or enter a 0 (zero) and no bonus will be calculated. If a Bonus Rewards value is entered, the **Bonus Rewards** and **Total Rewards** fields shown in Figure 3.2.13 will recalculate.

Figure 3.2.12



A text input field labeled "Bonus Rewards:" containing the number "1".

Figure 3.2.13



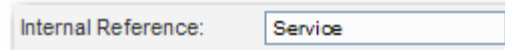
A summary box showing the following values:

Base Rewards:	2.00
Bonus Rewards:	1.00
Total Rewards:	3.00

11. If a **Bonus Offer Type** of "**Double Rewards**" or "**Triple Rewards**" is selected, the **Bonus Rewards** and **Total Rewards** fields shown in Figure 3.2.13 will recalculate based on the Base Rewards and the Bonus Offer Type.

12. The **Internal Reference** field shown in Figure 3.2.14 is an optional field that can contain an identifier to help track reward activity (e.g. invoice #, "Tires" or "Toyo") by transaction. You could use the same type of identifier for all transactions to simplify reporting or a different one for each transaction.

Figure 3.2.14



A text input field labeled "Internal Reference:" containing the word "Service".

13. Enter the Member's E-mail Address in the optional **Member's E-mail Address** field shown in Figure 3.2.15.

Figure 3.2.15



A text input field labeled "Member's E-mail:" which is currently empty.

14. If you have more than one transaction for the same member, due to a different Base or Bonus Offer or the internal reference is different, proceed to the next step; otherwise proceed to **Step # 28** to submit the transaction for processing.

15. Click the **Add Another Transaction** link shown in Figure 3.2.16 and the current transaction is saved on the screen as shown in Figure 3.2.17 and the Transaction Amount, Internal Reference and Bonus Rewards value fields are blanked out, so you can enter another transaction.

Figure 3.2.16

Base Rewards:	2.00
Bonus Rewards:	1.00
Total Rewards:	3.00
Add Another Transaction	
<input type="button" value="RESET"/>	<input type="button" value="SUBMIT"/>

16. The **Transaction List** shown in Figure 3.2.17 will display details of the transaction you saved. Please review the Transaction List and make sure the information is correct. If the information is **NOT correct**, then click the **Remove** link shown in Figure 3.2.17 to remove this entry and redo the transaction. If the transaction is correct, then proceed to the next step.

Figure 3.2.17

TRANSACTION LIST:	
Trans Amount:	\$200
Base Offer:	Percentage
Base Rewards:	2
Bonus Offer:	Custom
Bonus Rewards:	1
Work Order:	Service
SUB TOTAL:	3
Remove:	
TOTAL Rewards: 3	

17. Enter the pre-tax transaction amount without dollar signs or commas (e.g. 200) in the **Pre-Tax Trans Amt** field shown in Figure 3.2.18. If the field is left blank or contains invalid data, the errors shown in Figures 3.2.36 and 3.2.35 will display.

Figure 3.2.18

Pre-Tax Trans Amt: (\$) *	500
---------------------------	-----

18. Select the appropriate Base Offer for this transaction by clicking the **Base Offer Type** pull-down shown in Figure 3.2.19 and selecting one from the list (e.g. **Flat** or **Percentage**).

Figure 3.2.19

Base Offer Type:	Percentage
	Flat
	Percentage

19. If a Base Offer Type of “Percentage” is selected, you must enter the percentage amount in the **Percent Amount** field shown in Figure 3.2.20. After entering a percentage in the **Percentage Amount** field, the **Base Rewards** and **Total Rewards** fields shown in Figure 3.2.21 will display with the applicable rewards based on the Base Offer Type, Percentage Amount and Transaction Amount entered.

Figure 3.2.20

Percentage Amount *	1
---------------------	---

Figure 3.2.21

Base Rewards:	5.00
Bonus Rewards:	0.00
Total Rewards:	5.00

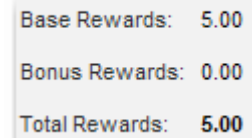
Figure 3.2.22

20. If a Base Offer Type of “Flat” is selected, you must enter the flat amount in the **Flat Amount** field shown in Figure 3.2.22. After entering an amount in the **Flat Amount** field, the **Base Rewards** and **Total Rewards** fields shown in Figure 3.2.23 will display with the applicable rewards based on the Base Offer Type, Flat Amount and Transaction Amount entered.



A screenshot of a form field labeled "Flat Amount *" with a text input box containing the number "5".

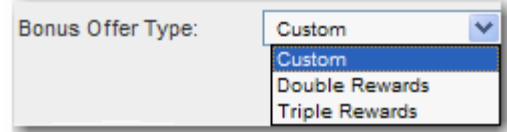
Figure 3.2.23



A screenshot showing a summary of rewards: "Base Rewards: 5.00", "Bonus Rewards: 0.00", and "Total Rewards: 5.00".

21. Select from the 3 types of optional Bonus Offers available (e.g. Custom, Double Rewards and Triple Rewards), by clicking the **Bonus Offer Type** pull-down shown in Figure 3.2.24 to select the appropriate Bonus Offer from the list.

Figure 3.2.24



A screenshot of a pull-down menu labeled "Bonus Offer Type:". The menu is open, showing three options: "Custom", "Double Rewards", and "Triple Rewards". "Custom" is currently selected.

22. If a **Bonus Offer Type** of “Custom” is selected (default), you can optionally enter the bonus value in the **Bonus Rewards** field shown in Figure 3.2.25 or leave the field blank or enter a 0 (zero) and no bonus will be calculated. If a Bonus Rewards value is entered, the **Bonus Rewards** and **Total Rewards** fields shown in Figure 3.2.23 will recalculate.

Figure 3.2.25

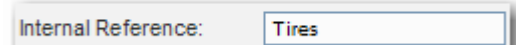


A screenshot of a form field labeled "Bonus Rewards:" with an empty text input box.

23. If a **Bonus Offer Type** of “Double Rewards” or “Triple Rewards” is selected from the list shown in Figure 3.2.24, the **Bonus Rewards** and **Total Rewards** fields shown in Figure 3.2.23 will recalculate based on the Base Rewards and Bonus Offer Type values.

24. The **Internal Reference** field shown in Figure 3.2.26 is an optional field that can contain an identifier to help track reward activity (e.g. invoice #, “Tires” or “Toyo”) by transaction. You could use the same type of identifier for all transactions to simplify reporting or a different one for each transaction.

Figure 3.2.26



A screenshot of a form field labeled "Internal Reference:" with a text input box containing the word "Tires".

Figure 3.2.27

[Add Another Transaction](#)

25. Click the **Add Another Transaction** link shown in Figure 3.2.27 and review your transactions in the **Transaction List**. All of your transactions will be listed as shown in Figure 3.2.28, so that you can not only see the individual transactions, but the transaction totals. If you find any transactions that are not correct, then delete them.

Figure 3.2.28

TRANSACTION LIST:	
Trans Amount:	\$200
Base Offer:	Percentage
Base Rewards:	2
Bonus Offer:	Custom
Bonus Rewards:	1
Work Order:	Service
SUB TOTAL:	3
Remove:	
<hr/>	
Trans Amount:	\$500
Base Offer:	Percentage
Base Rewards:	5
Bonus Offer:	Custom
Bonus Rewards:	0
Work Order:	Tires
SUB TOTAL:	5
Remove:	
<hr/>	
TOTAL Rewards: 8	

26. If you wish to add another transaction, then proceed to **Step # 18**.

27. If you wish to cancel the entire **Credit Rewards** transaction and start over, you can click the **Reset** button shown in Figure 3.2.29 at any time.

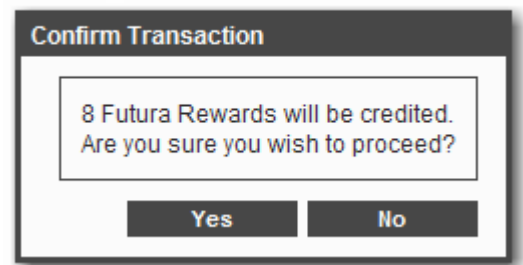
Figure 3.2.29



28. You must press the **Submit** button shown in Figure 3.2.29 to send the transaction for processing.

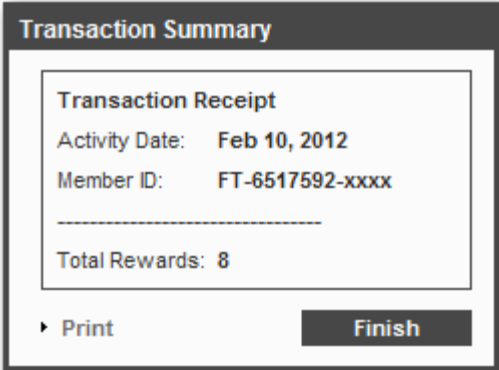
29. After clicking the **Submit** button shown in Figure 3.2.29 you will receive a confirmation box like the one shown in Figure 3.2.30. If you are satisfied with the transaction(s), click the **Yes** button to submit the transaction record for processing, otherwise press the **No** button to cancel the transaction.

Figure 3.2.30



30. The confirmation message shown in Figure 3.2.31 will display confirming the record has been submitted for processing. You must click the *Finish* button to close the window.

Figure 3.2.31

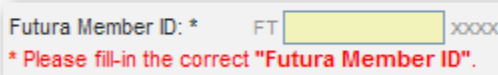


The image shows a 'Transaction Summary' window. It contains a 'Transaction Receipt' section with the following details: Activity Date: Feb 10, 2012; Member ID: FT-6517592-xxxx; and Total Rewards: 8. At the bottom of the window, there are two buttons: 'Print' and 'Finish'.

Transaction Summary	
Transaction Receipt	
Activity Date:	Feb 10, 2012
Member ID:	FT-6517592-xxxx

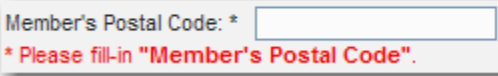
Total Rewards:	8
Print Finish	

Figure 3.2.32



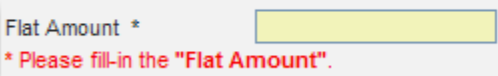
The image shows a form field for 'Futura Member ID: *'. The input field contains 'FT' followed by a yellow box and 'xxxx'. Below the field is a red error message: '* Please fill-in the correct "Futura Member ID".'

Figure 3.2.33



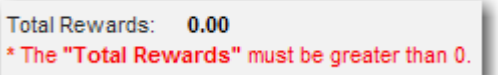
The image shows a form field for 'Member's Postal Code: *'. The input field is empty. Below the field is a red error message: '* Please fill-in "Member's Postal Code".'

Figure 3.2.34



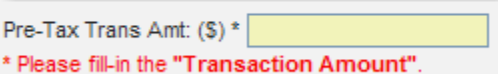
The image shows a form field for 'Flat Amount *'. The input field is empty. Below the field is a red error message: '* Please fill-in the "Flat Amount".'

Figure 3.2.35



The image shows a form field for 'Total Rewards:'. The input field contains '0.00'. Below the field is a red error message: '* The "Total Rewards" must be greater than 0.'

Figure 3.2.36



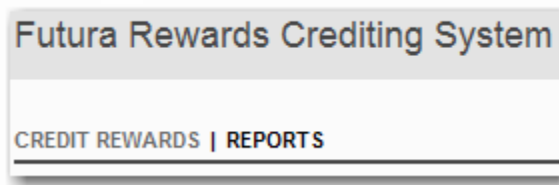
The image shows a form field for 'Pre-Tax Trans Amt: (\$) *'. The input field is empty. Below the field is a red error message: '* Please fill-in the "Transaction Amount".'

4. REPORTS

4.1 TRANSACTION HISTORY REPORT

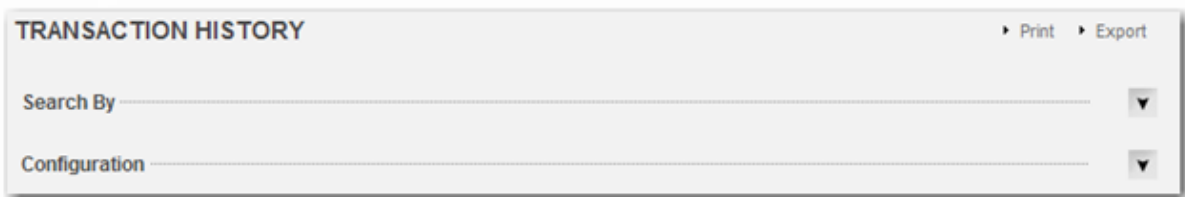
1. Select **Reports** from the menu shown in Figure 4.1.1 and the Transaction History screen shown in Figure 4.1.2 will display.

Figure 4.1.1



2. The **Transaction History** screen shown in Figure 4.1.2 allows you to view, print or export your Transaction History.

Figure 4.1.2



3. If the **Search By** or **Configuration** fields are not visible as shown in Figure 4.1.2, then click the **Down Arrow** shown in Figure 4.1.3 to display the fields.

Figure 4.1.3



4. If you wish to hide the **Search By** or **Configuration** fields, then click the **Up Arrow** shown in Figure 4.1.4 to hide the fields.

Figure 4.1.4



5. You can use the **Entry Date From** and **Entry Date To** fields shown in Figures 4.1.5 and 4.1.6 to filter the results to only those records that have an **Entry Date** that falls between the two dates. To change the date, click the **Calendar Icon** and select the day from the pop up calendar

Figure 4.1.5

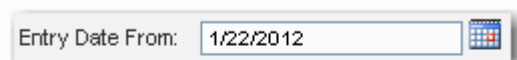
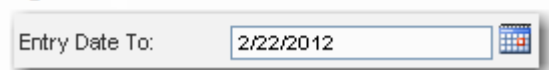
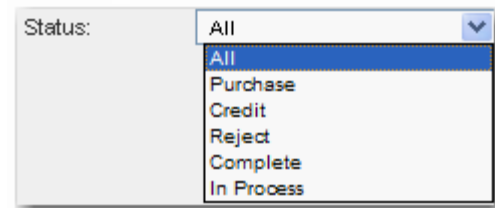


Figure 4.1.6



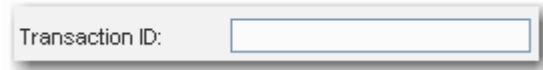
6. If you wish to view transactions with a specific transaction status, then click the **Status** field drop-down shown in Figure 4.1.7 and select one from the list.

Figure 4.1.7

A screenshot of a web application showing a 'Status:' label followed by a drop-down menu. The menu is open, displaying a list of options: 'All' (highlighted in blue), 'Purchase', 'Credit', 'Reject', 'Complete', and 'In Process'. The 'All' option is currently selected.

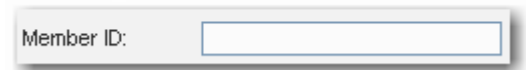
7. You can use the **Transaction ID** field shown in Figure 4.1.8 to enter a specific Transaction ID to view the details on that specific transaction.

Figure 4.1.8

A screenshot of a web application showing a 'Transaction ID:' label followed by a text input field.

8. To view all transactions for a specific member, enter their Member ID in the **Member ID** field shown in Figure 4.1.9.

Figure 4.1.9

A screenshot of a web application showing a 'Member ID:' label followed by a text input field.

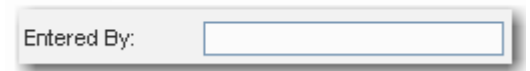
9. If you are looking for all transactions that have a specific value in the Internal Reference field, you can enter that value in the **Internal Ref** field shown in Figure 4.1.10.

Figure 4.1.10

A screenshot of a web application showing an 'Internal Ref:' label followed by a text input field.

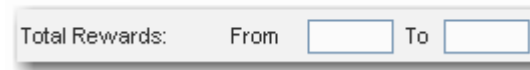
10. You can view all transactions entered by a specific staff member, by entering their Staff ID in the **Entered By** field shown in Figure 4.1.11.

Figure 4.1.11

A screenshot of a web application showing an 'Entered By:' label followed by a text input field.

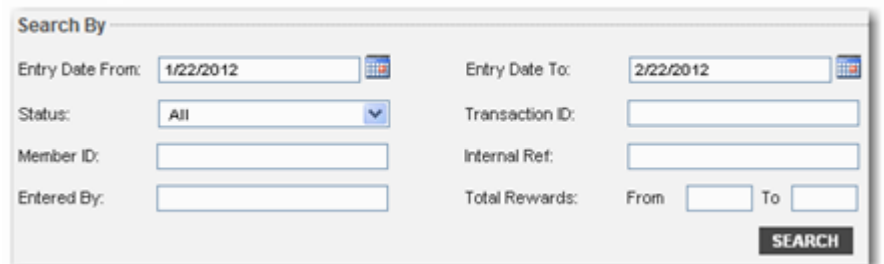
11. To view all transactions that meet a specific Total Rewards range, enter the From and To range in the respective **Total Rewards From** and **Total Rewards To** fields shown in Figure 4.1.12.

Figure 4.1.12

A screenshot of a web application showing a 'Total Rewards:' label followed by 'From' and 'To' text input fields.

12. When you have finished selecting your **Search By** criteria, click the **Search** button shown in Figure 4.1.13 to filter and display your data.

Figure 4.1.13

A screenshot of a web application showing a 'Search By' form. The form contains several input fields: 'Entry Date From:' (1/22/2012), 'Entry Date To:' (2/22/2012), 'Status:' (All), 'Transaction ID:', 'Member ID:', 'Internal Ref:', 'Entered By:', and 'Total Rewards:' (From and To fields). A 'SEARCH' button is located at the bottom right of the form.

13. After your data has been displayed in the grid at the bottom of the screen as shown in Figure 4.1.14, you can choose the fields to display by **Checking / Un-Checking** the individual fields shown in Figure 4.1.15. For example, if you wish to remove the Status field from the data, uncheck the **Transaction ID** field check box shown in Figure 4.1.16 and the Transaction ID Field vanishes from the report as shown in Figure 4.1.17.
14. You can sort your data by clicking the column names in the report header shown in figure 4.1.14. For example, you will notice that the **Member ID** field has an **Up-Arrow** beside it, which denotes that this field is the sort field and it is sorted in **Ascending** order. If you were to click the **Member ID** field again, the **Up-Arrow** would change to a **Down-Arrow** meaning that the sort order is now **Descending**. You may click any column name in the report header and the program will sort the data based on the data in that column.

Figure 4.1.14

Member ID ▲	Transaction Date	Entry Date	Transaction Amount	Base Amount	Bonus Amount	Total Amount	Transaction ID	Inte
6517592	2/10/2012	2/10/2012	\$200.00	2	0	2	FT00106610	937
6517592	2/10/2012	2/10/2012	\$200.00	2	0	2	FT00106620	Serv
6517592	2/10/2012	2/10/2012	\$0.00	0	1	1	FT00106621	Serv
6517592	2/10/2012	2/10/2012	\$500.00	5	0	5	FT00106640	Tires
6517592	2/14/2012	2/14/2012	\$450.00	9	0	9	FT00106650	937

Figure 4.1.15

Columns:

<input checked="" type="checkbox"/> Member ID	<input checked="" type="checkbox"/> Transaction Date	<input checked="" type="checkbox"/> Entry Date	<input checked="" type="checkbox"/> Transaction Amount
<input checked="" type="checkbox"/> Base Amount	<input checked="" type="checkbox"/> Bonus Amount	<input checked="" type="checkbox"/> Total Amount	<input checked="" type="checkbox"/> Transaction ID
<input checked="" type="checkbox"/> Internal Ref	<input checked="" type="checkbox"/> Entered By	<input checked="" type="checkbox"/> Status	

Figure 4.1.16

☐ Transaction ID

Figure 4.1.17

Member ID ▲	Transaction Date	Entry Date	Transaction Amount	Base Amount	Bonus Amount	Total Amount	Internal Ref	Entere
6517592	2/10/2012	2/10/2012	\$200.00	2	0	2	937	Fut Owr
6517592	2/10/2012	2/10/2012	\$200.00	2	0	2	Service	Fut Owr
6517592	2/10/2012	2/10/2012	\$0.00	0	1	1	Service	Fut Owr
6517592	2/10/2012	2/10/2012	\$500.00	5	0	5	Tires	Fut Owr
6517592	2/14/2012	2/14/2012	\$450.00	9	0	9	937	Fut Owr

15. The number of records that display on a report defaults to 10 records as shown in Figure 4.1.18, but you can change it by clicking the **Page Size** field drop-down and selecting a value from the list.

Figure 4.1.18

Page Size: 10

- None
- 5
- 10
- 20

16. You can choose to display scroll bars at the bottom of the report by clicking the **Scroll** field check-box as shown in Figure 4.1.19. If you turn on the Scroll bars, then they will appear at the bottom of the screen as shown in Figure 4.1.20.

Figure 4.1.19

Scroll: ☒

Figure 4.1.20

Member ID ▲	Transaction Date	Entry Date	Transaction Amount	Base Amount	Bonus Amount	Total Amount	Internal Ref	Entered
6517592	2/10/2012	2/10/2012	\$200.00	2	0	2	937	Fut Own
6517592	2/10/2012	2/10/2012	\$200.00	2	0	2	Service	Fut Own
6517592	2/10/2012	2/10/2012	\$0.00	0	1	1	Service	Fut Own
6517592	2/10/2012	2/10/2012	\$500.00	5	0	5	Tires	Fut Own
6517592	2/14/2012	2/14/2012	\$450.00	9	0	9	937	Fut Own

< 1 2 >

17. You can make all of your configuration selections the default by clicking the **Save** button shown in Figure 4.1.22.

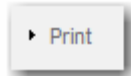
Figure 4.1.21

Save

4.2 PRINTING YOUR TRANSACTION HISTORY REPORT

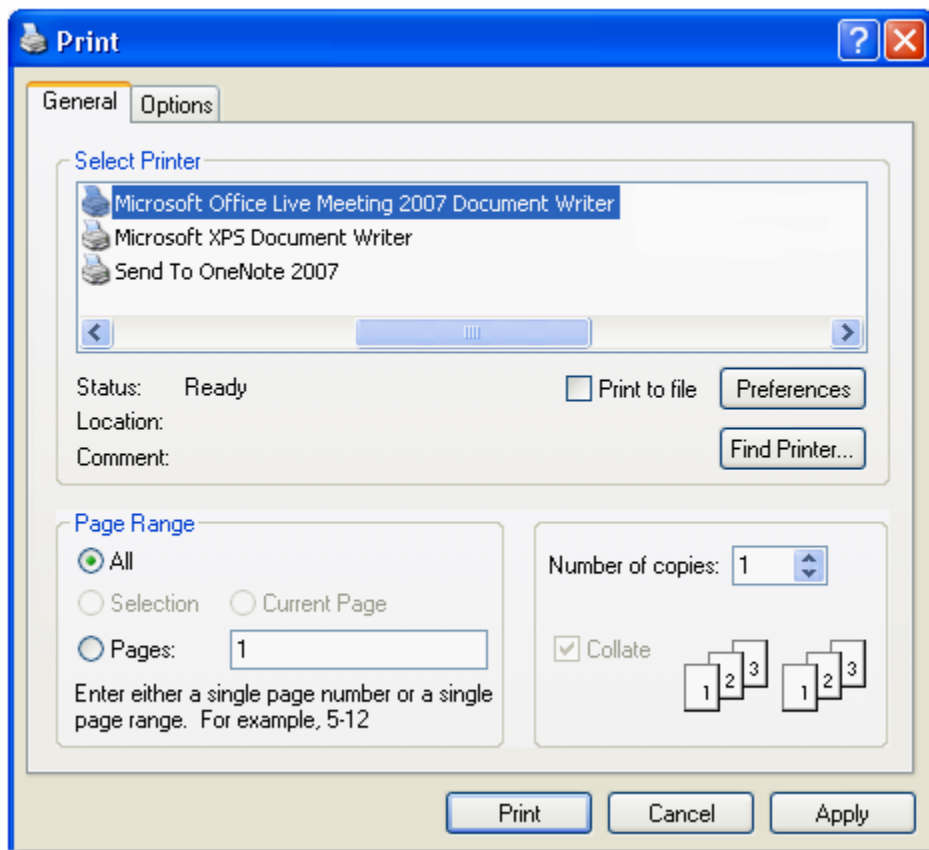
Figure 4.2.1

1. You can print your data by clicking the **Print** button shown in Figure 4.2.1.



2. The **Print** dialog box will appear like the one shown in Figure 4.2.2 and from there, you can select your printer and print options. Click the **Print** button shown in Figure 4.2.2 after making your changes to print your data.

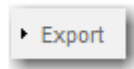
Figure 4.2.2



4.3 EXPORTING YOUR TRANSACTION HISTORY REPORT

1. If you wish to export your data to Excel or to a CSV file, click the **Export** button shown in Figure 4.3.1.

Figure 4.3.1



2. When you click the **Export** button, you will receive the **File Download** dialog box shown in Figure 4.3.2 and you have the option to “**Open**” or “**Save**” the file.

Figure 4.3.2

