

Adding a Birthday/Anniversary



Step 1

Go to www.online.valorpaytech.com and enter your login credentials.

Email

Password

Remember Me [Forgot Password](#)

SIGN IN

VALOR
PAYTECH

Step 2

Select **Engage My Customer** in the sidebar menu.

User Management

Transactions

Virtual Terminal

Device Management

Engage My Customers

Promotions

Valor Shield RT

Contact Us

My Tickets

My Setting

Reports

Downloads

\$1.15
Last Month
(Total Volume)

\$12.94
Current Month
(Total Volume)

\$12.94
Current Day
(Total Volume)

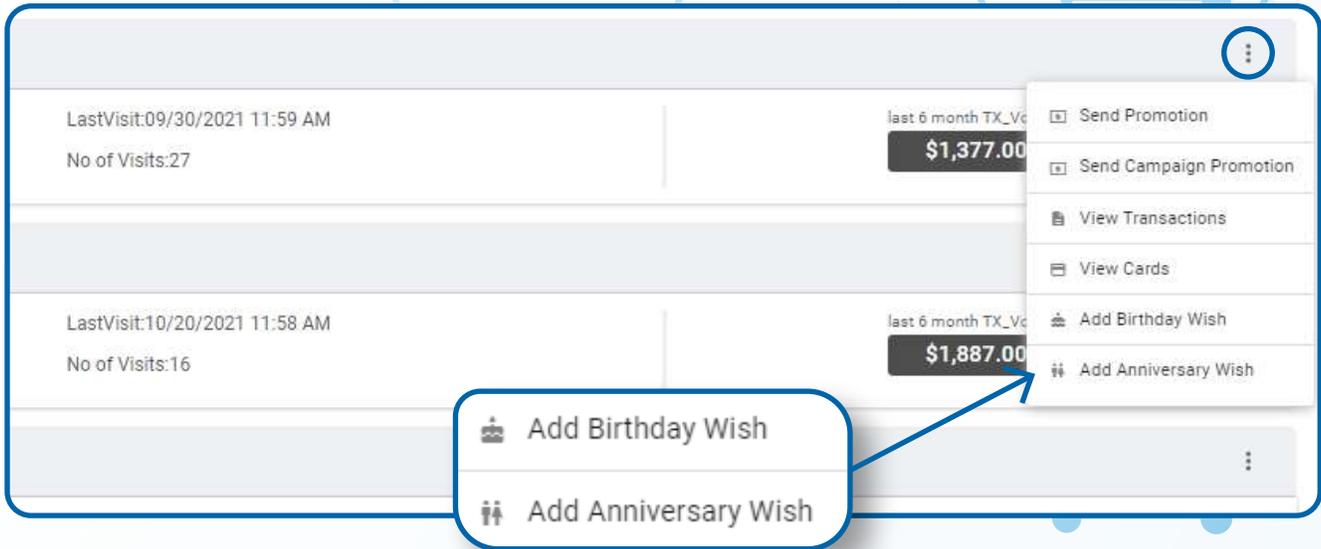
\$0.2
Average Volume per day
(last 3 Months)

Current Month Transactions

Engage My Customers

Step 3

Select the **Customer** you want to add a **Wish** date by selecting the **Vertical Ellipsis** on the top right-hand corner of their profile and selecting either **Add Birthday Wish** or **Add Anniversary Wish**.



The screenshot displays a list of customer profiles. Each profile includes fields for 'LastVisit' and 'No of Visits'. A dropdown menu is open for the second customer, showing options: 'Send Promotion', 'Send Campaign Promotion', 'View Transactions', 'View Cards', 'Add Birthday Wish', and 'Add Anniversary Wish'. A callout box highlights the 'Add Birthday Wish' and 'Add Anniversary Wish' options.

Customer Profile	LastVisit	No of Visits	last 6 month TX_Vol
Customer 1	09/30/2021 11:59 AM	27	\$1,377.00
Customer 2	10/20/2021 11:58 AM	16	\$1,887.00

- Add Birthday Wish
- Add Anniversary Wish

Step 4

You will then be prompted to add the date for either their **Birthday Wish** or **Anniversary Wish**.

Birthday Wish

Select Date

02/07/2022 

(347) 572-3784

CANCEL **SAVE**

Anniversary Wish

Select Date

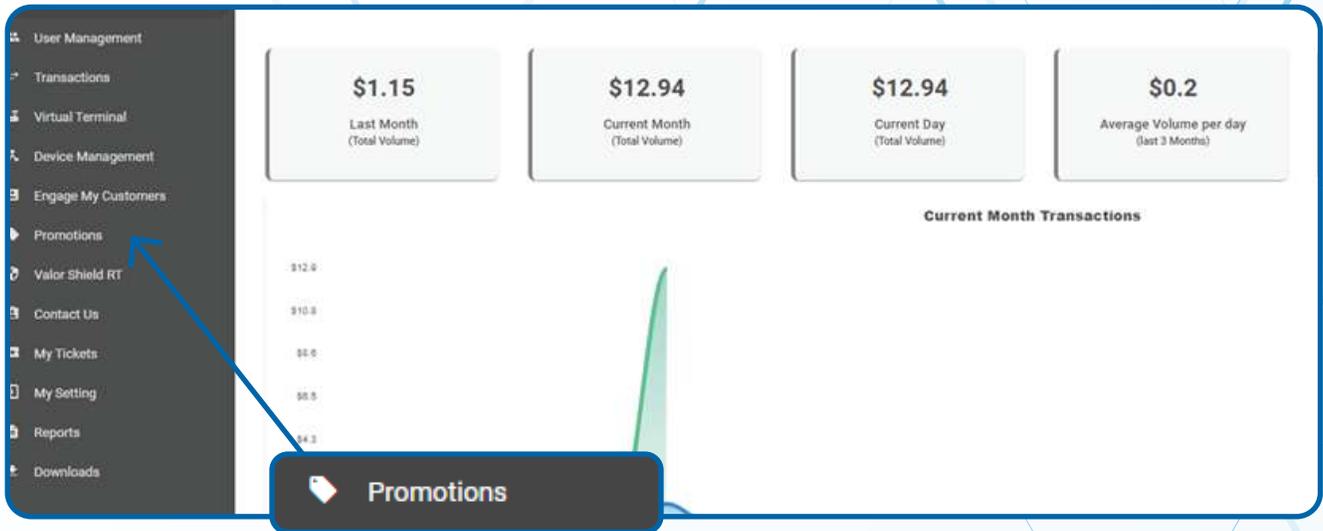
02/07/2022 

(347) 572-3784

CANCEL **SAVE**

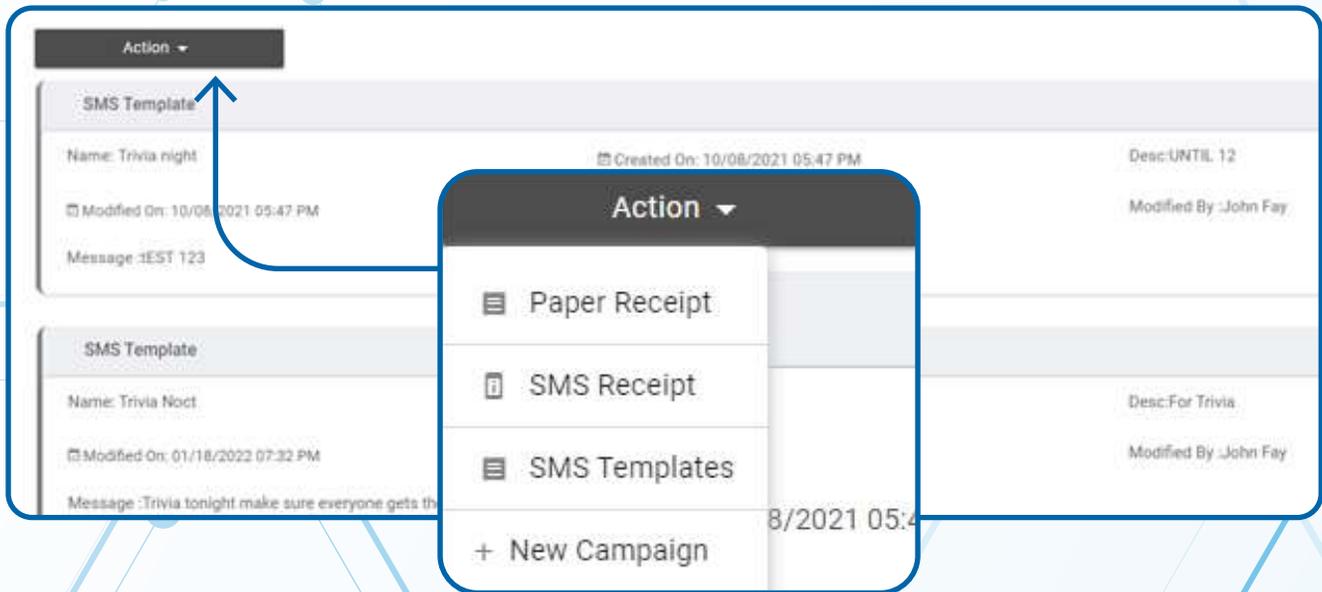
Step 5

The messages sent for the **Wish** can be added through **Promotions** on the sidebar menu.



Step 6

Selecting **Action** will allow you to create a **New Campaign**



Step 7

You can select Wish by checking the box, and select from **Anniversary or Birthday** from the drop-down menu.

New Campaign for SMS MMS Wishes Anniversary Wish ▾

Happy Anniversary

Thank you for your continued patronage.

Remaining characters 186 out of 225

CANCEL SAVE

Step 8

Once completed select **Save**.

New Campaign for SMS MMS Wishes Anniversary Wish ▾

Happy Anniversary

Thank you for your continued patronage.

Remaining characters 186 out of 225

CANCEL SAVE ←

Step 9

Once saved, you may view existing **Wishes** through **Promotions**.

Action ▾

SMS Template		
Name: Trivia night	Created On: 10/08/2021 05:47 PM	Desc: UNTIL 12
Modified On: 10/08/2021 05:47 PM	Created By :John Fay	Modified By :John Fay
Message :EST 123		
SMS Template		
Name: Trivia Noct	Created On: 01/18/2022 07:32 PM	Desc: For Trivia
Modified On: 01/18/2022 07:32 PM	Created By :John Fay	Modified By :John Fay
Message : Trivia tonight make sure everyone gets there at 9		
Campaign SMS		
Name: Bday	Created On: 02/07/2022 04:23 AM	Desc: Happy Birthday
Status: ACTIVE	Subject: Happy Birthday	Wishes Status : ACTIVE
Wishes : Birthday Wish		