



Engage My Customers (As a Merchant)

STEP 1

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

Email

Password

Remember Me [Forgot Password](#)

SIGN IN

STEP 2

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

Dashboard

User Management

Transactions

Virtual Terminal

Device Management

Engage My Customers

Promotions

Valor Shield RT

Contact Us

My Tickets

My Setting

Reports

Downloads

THE PLANTRONIX AAAAAA

130 Customer Count

42% Repeated Customer

17% Volume % Of Repeated Customer

\$ 784.21 Volume Of Repeated Customer

Store	MobileNo	Name	LastVisit	No of Visits	Anniversary Wish	last 6 month TX_Volume
Store : The Plantronix	MobileNo.1:(824) 837-7678	Name:4popip	LastVisit:04/20/2022 08:18 AM	No of Visits:366	Anniversary Wish :05/15/2013	\$0.00
	MobileNo.2:(546) 464-5645	Email:rooban.renio07@gmail.com				
	MobileNo.3:(786) 363-6544	Birthday Wish :07/22/2022				
Store : The Plantronix#2	MobileNo.1:(897) 979-8797	Name:12ertertyertert	LastVisit:01/05/2022 06:30 AM	No of Visits:156		\$0.00
	MobileNo.2:(454) 545-4545	Email:rooban.renio07@gmail.com				
	MobileNo.3:(333) 333-3333					
Store : The Plantronix	MobileNo.1:(787) 898-9898	Name:SDFSDFSD	LastVisit:05/04/2021 02:13 AM	No of Visits:43		\$0.00

Engage My Customers

STEP 3

You will now have information regarding your **Customer Count**, how many Customers are **Repeated Customers**, **Volume % of Repeated Customers**, **Volume \$ of Repeated Customers** at the top of your screen.

The screenshot shows a dashboard for 'THE PLANTRONIX AAAAAAAA'. At the top, there are four summary cards: '130 Customer Count', '42% Repeated Customer', '17% Volume % Of Repeated Customer', and '\$ 784.21 Volume Of Repeated Customer'. Below these is a search bar and a 'MANAGE' button. The main content is a list of customers, with two entries highlighted. Each entry shows store information, mobile numbers, name, email, last visit, number of visits, birthday wish, anniversary wish, and last 6 month TX_Volume.

Store	MobileNo.1	MobileNo.2	MobileNo.3	Name	Email	BirthDay Wish	Anniversary Wish	Last Visit	No of Visits	Last 6 month TX_Volume
The Plantronix	(824) 837-7678	(546) 464-5645	(786) 363-6544	4popipip	rooban.renio07@gmail.com	:07/22/2022	:05/15/2013	04/20/2022 08:18 AM	366	\$0.00
The Plantronix#2	(897) 979-8797	(454) 545-4545	(333) 333-3333	12ertertyertert	rooban.renio07@gmail.com			01/05/2022 06:30 AM	156	\$0.00

STEP 4

On the lower portion of the screen you will now have access to your **Individual Customers**, as well as some vital information related to that customer such as their **Mobile Number** (If provided in transaction), **Number of Visits**, their **Last Visit**, their **Birthday Wish**(if provided), as well as a Total of their purchases over the last 6 months.

This screenshot is identical to the one in Step 3, showing the same dashboard with summary statistics and a list of customers. The focus is on the individual customer information provided for each entry.

STEP 5

When selecting the **Vertical Elipsis** of an individual **Customer** on the right hand side you will be brought with a few options including: Send Promotion, Send Campaign Promotion, View Transactions, View Cards, Add Birthday Wish, and Add Anniversary Wish.

The screenshot displays a dashboard for 'THE PLANTRONIX AAAAAAAAAA'. At the top, there are four summary cards: '130 Customer Count', '42% Repeated Customer', '17% Volume % Of Repeated Customer', and '\$ 784.21 Volume Of Repeated Customer'. Below these is a table of customers. A dropdown menu is open over the first customer, showing the following options: 'Send Promotion', 'Send Campaign Promotion', 'View Transactions', 'View Cards', 'Add Birthday Wish', and 'Add Anniversary Wish'. An arrow points from the 'Send Promotion' option to the right.

Store	MobileNo.1	MobileNo.2	MobileNo.3	Name	Email	Birthday Wish
The Plantronix	(824) 837-7678	(546) 464-5645	(786) 363-6544	4poplpi	rooban.renio07@gmail.com	.07/22/2022
The Plantronix#2	(897) 979-8797	(454) 545-4545	(333) 333-3333	12ertertyertert	rooban.renio07@gmail.com	

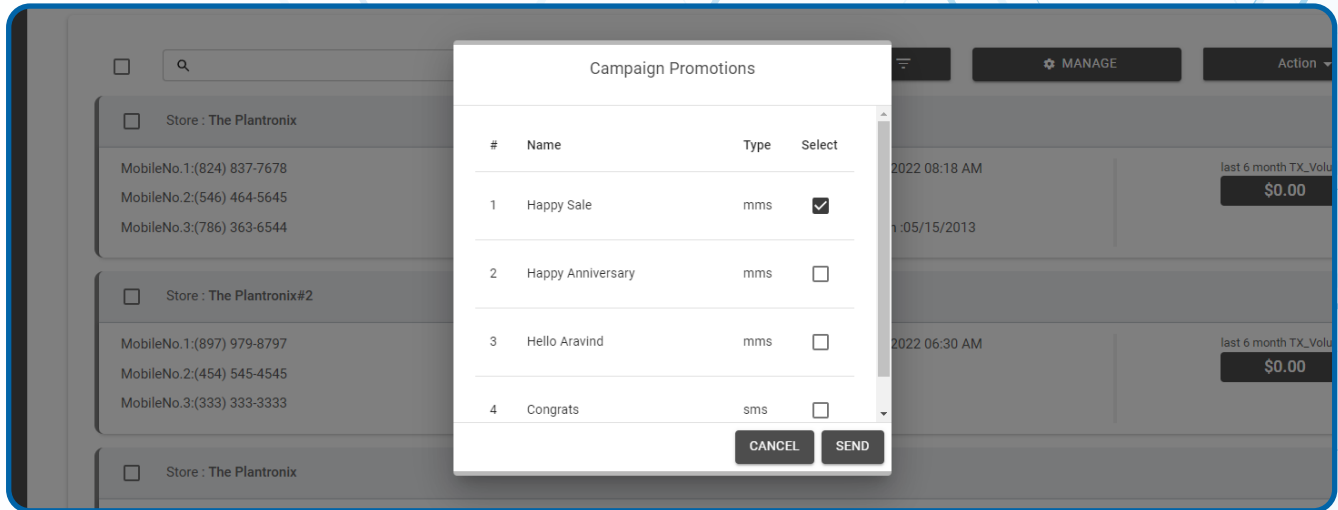
STEP 6

When **Send Promotion** is selected, you will have the ability to send your customer a Message with the **Mobile Number** that was provided.

The screenshot shows a 'Promotion Message' dialog box. It has a 'July Offer' dropdown menu. Below it, the text 'Send Promotion Message to : (824) 837-7678' is displayed. There is a text input field with the placeholder 'Type msg here.....' and the text 'The Plantronix aaaaaaaa' entered. At the bottom right, there are 'CANCEL' and 'SEND' buttons.

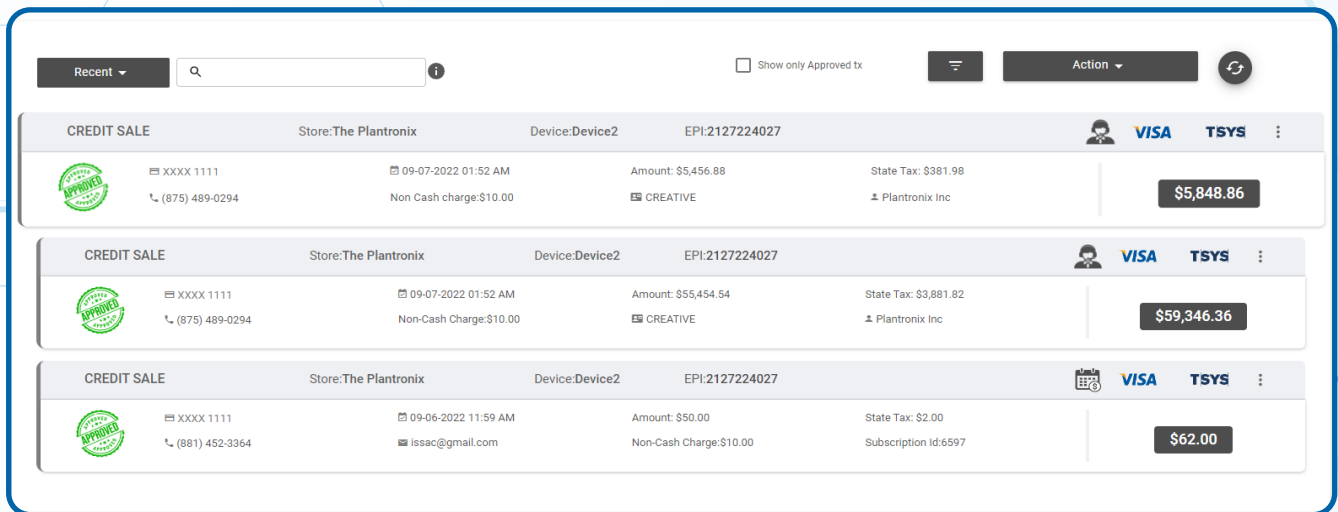
STEP 7

When **Send Campaign Promotion** is selected, if setup, you will now be able to Send an SMS or MMS to your Customer.



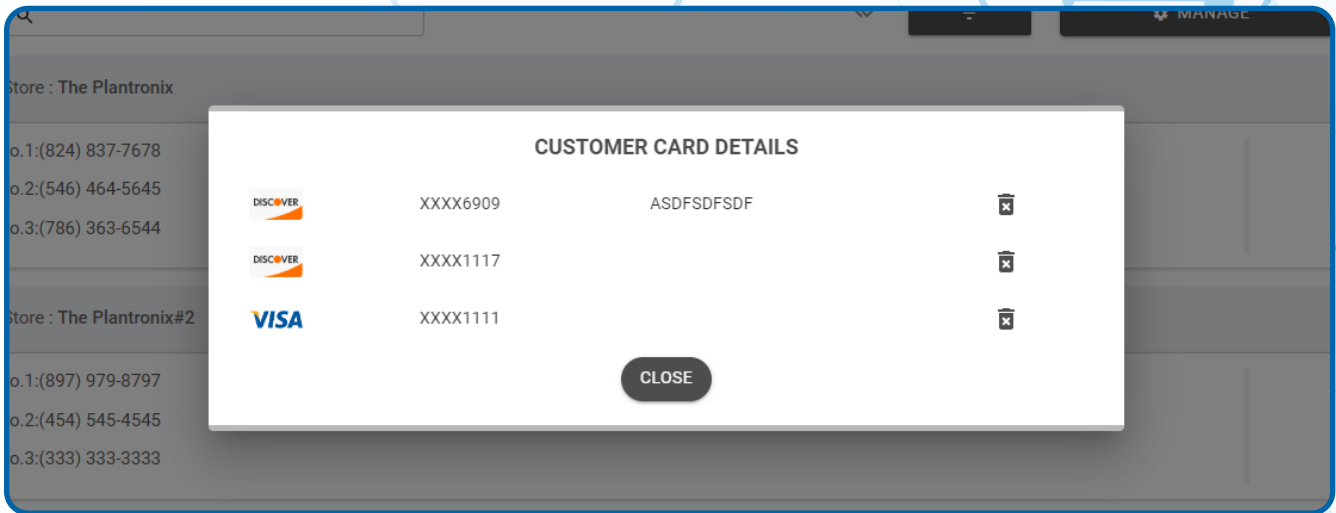
STEP 8

When **Transactions** is selected, you will be able to view your **Customer Transaction History** including any **SALE, REFUND, VOID, PREAUTH**, your **Customer** may have had. You will also have access to the **Number of Transactions** as well as their **Total Amount Spent** with your Business.



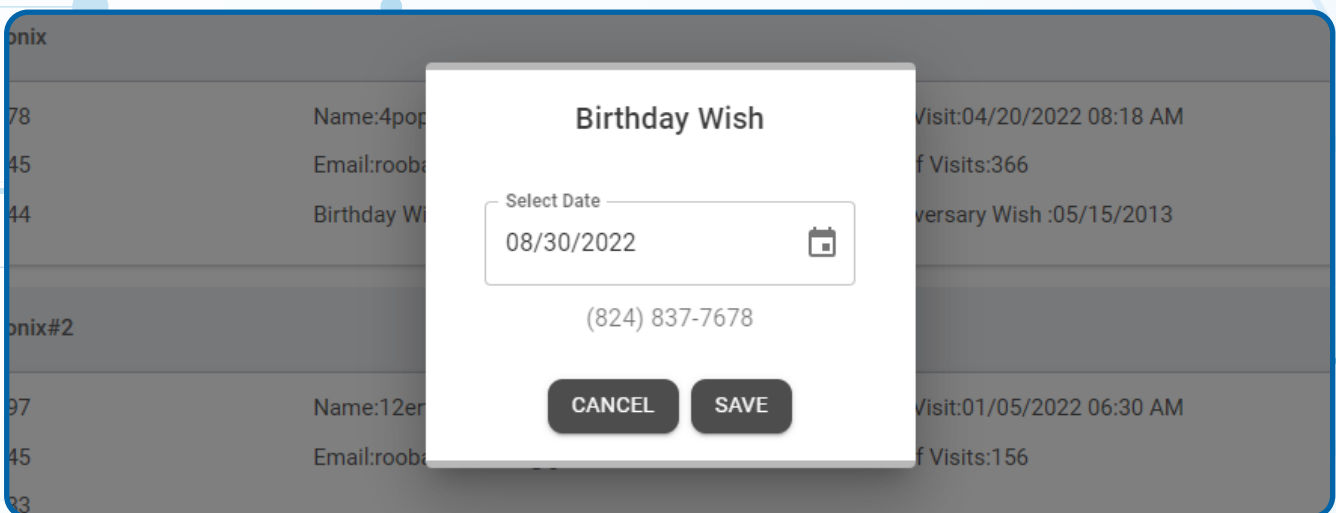
STEP 9

When **View Cards** is selected, you will be able to view your Customer's cards used with your business, if any. These details will include the last 4 digits of their card, and Customer Name as well as a means to remove that information.



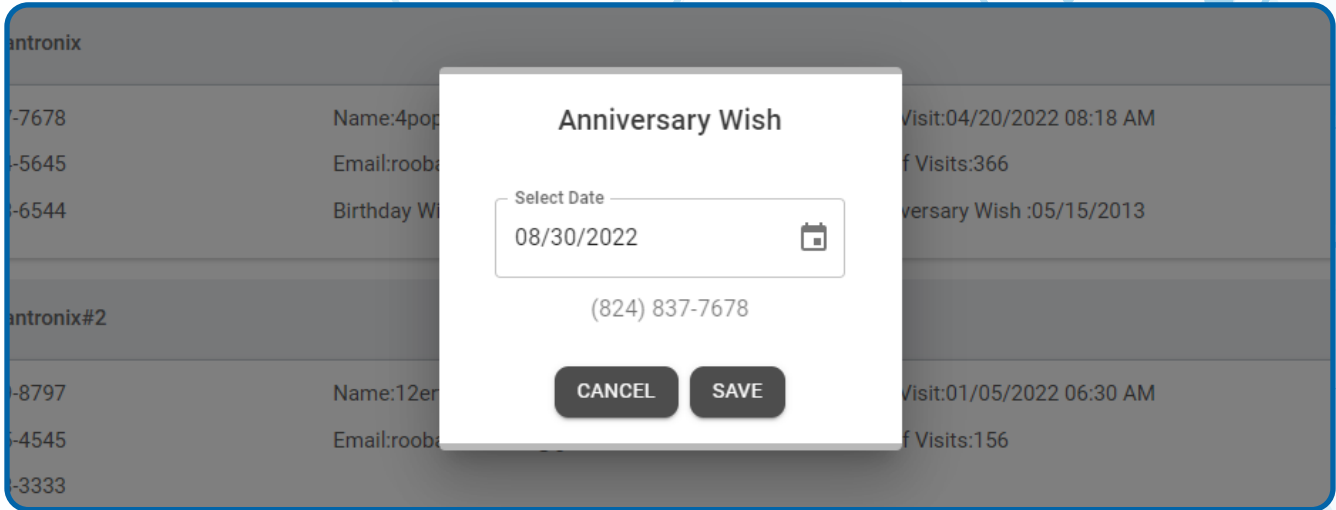
STEP 10

When **Add Birthday Wish** is selected, you will be able to View and Edit your **Customer's Stored Birthday**. You may use this to assist with targeted **Campaigns** that will be setup in **Promotions**.



STEP 11

When **Add Anniversary Wish** is selected, you will be able to **View and Edit your Customer's Stored Anniversary Date**. You may use this to assist with targeted **Campaigns** that will be setup in **Promotions**.



The screenshot displays a customer management interface with a modal window titled "Anniversary Wish". The modal contains a "Select Date" field with a calendar icon, showing the date "08/30/2022". Below the date field is the phone number "(824) 837-7678". At the bottom of the modal are two buttons: "CANCEL" and "SAVE". The background shows a list of customer records with fields for Name, Email, Birthday, and Anniversary Wish.

Customer ID	Name	Email	Birthday	Anniversary Wish
antronix -7678	Name:4pop			Visit:04/20/2022 08:18 AM
-5645	Email:roob			f Visits:366
-6544	Birthday W			iversary Wish :05/15/2013
antronix#2				
-8797	Name:12er			Visit:01/05/2022 06:30 AM
-4545	Email:roob			f Visits:156
-3333				