



# FlexPoints Service Catalogue

Paytronix

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# Loyalty Essentials Workshop

SC-0001 - Strategic Engagements - Updated: 07/30/2025



1630 FlexPoints

## Overview:

Paytronix delivers a loyalty program consultation covering loyalty fundamentals and design proposals, plus 2 hours of post-workshop support.

- Pre-Workshop Discovery/Development: Client completes a pre-workshop questionnaire within one (1) week. Paytronix will then develop customized workshop materials using these responses and additional content.
- Program Workshop (3 hours): Paytronix Strategy & Analytics experts guide clients through: Loyalty program fundamentals (Loyalty 101); Types of loyalty programs Paytronix implements; Loyalty design principles overview; Custom loyalty program design proposal(s); Along with success recommendations provided throughout.
- Post-Workshop Consultation: Up to two (2) hours of consultation within two weeks post-workshop for questions about workshop content. No additional analysis or incremental content provided during consultation and the Client is responsible for final loyalty program design decisions and approval.

[Find out more](#)



Available for: Paytronix

## Expected Outcome:

Following this workshop, you will have a loyalty program design and an understanding of essential components for a successful Paytronix-hosted Loyalty solution. Paytronix implementation of the Program is not part of this service.

## Prerequisites:

Needs Paytronix Loyalty



# Loyalty Advanced Workshop

SC-0002 - Strategic Engagements - Updated: 07/30/2025



**3250 FlexPoints**

## Overview:

Paytronix delivers an advanced loyalty program consultation featuring current program evaluation and strategic recommendations, plus 2 hours of post-workshop support.

- Pre-Workshop Discovery/Development: Client completes a pre-workshop questionnaire within one (1) week. Paytronix will then develop customized workshop materials using questionnaire responses and additional content.
- Program Workshop (3 hours): Paytronix Strategy & Analytics experts guide clients through: Loyalty program fundamentals (Loyalty 101); Types of loyalty programs Paytronix implements; Loyalty design principles overview; Advanced evaluation of client's current loyalty program (KPI review, program health analysis, and campaign review) using available Paytronix data; Loyalty program design proposal(s) if needed; and Comprehensive recommendations including best practice recurring campaigns, promotion ideas, and guest segmentation opportunities.
- Post-Workshop Consultation: Up to two (2) hours of consultation within two weeks post-workshop for questions about workshop content. No additional analysis or incremental content provided during consultation and the Paytronix S&A team is not responsible for executing chosen recommendations

[Find out more](#)



Available for: Paytronix

## Expected Outcome:

Following this workshop, you will have a strong understanding of your current loyalty program's health and what opportunities you have to enhance overall performance to drive business impact.

## Prerequisites:

Needs Paytronix Loyalty

# Loyalty Campaign Workshop

SC-0003 - Strategic Engagements - Updated: 07/30/2025



**400 FlexPoints**

## Overview:

Paytronix delivers a consultation workshop covering loyalty fundamentals and campaign strategies, plus 1 hour of post-workshop support.

- Pre-Workshop Discovery/Development: Client completes pre-workshop questionnaire within one (1) week. Paytronix will then develop customized workshop materials using questionnaire responses and additional content.
- Program Workshop (3 hours): Paytronix Strategy & Analytics experts guide clients through: Loyalty program fundamentals and best practices; Review of best practice recurring campaigns; Promotion campaign ideas; and Segmentation opportunities.
- Post-Workshop Consultation: Up to one (1) hour of consultation within two weeks post-workshop for questions about workshop content. No additional analysis or incremental content provided during consultation and the Paytronix S&A team is not responsible for executing chosen recommendations.

[Find out more](#)



**Available for: Paytronix**

## Expected Outcome:

Following this workshop, you will have an outline of loyalty promotion campaigns that can be executed for your Paytronix-hosted loyalty solution.

## Prerequisites:

Needs Paytronix Loyalty

# Online Ordering Workshop

SC-0004 - Strategic Engagements - Updated: 07/30/2025



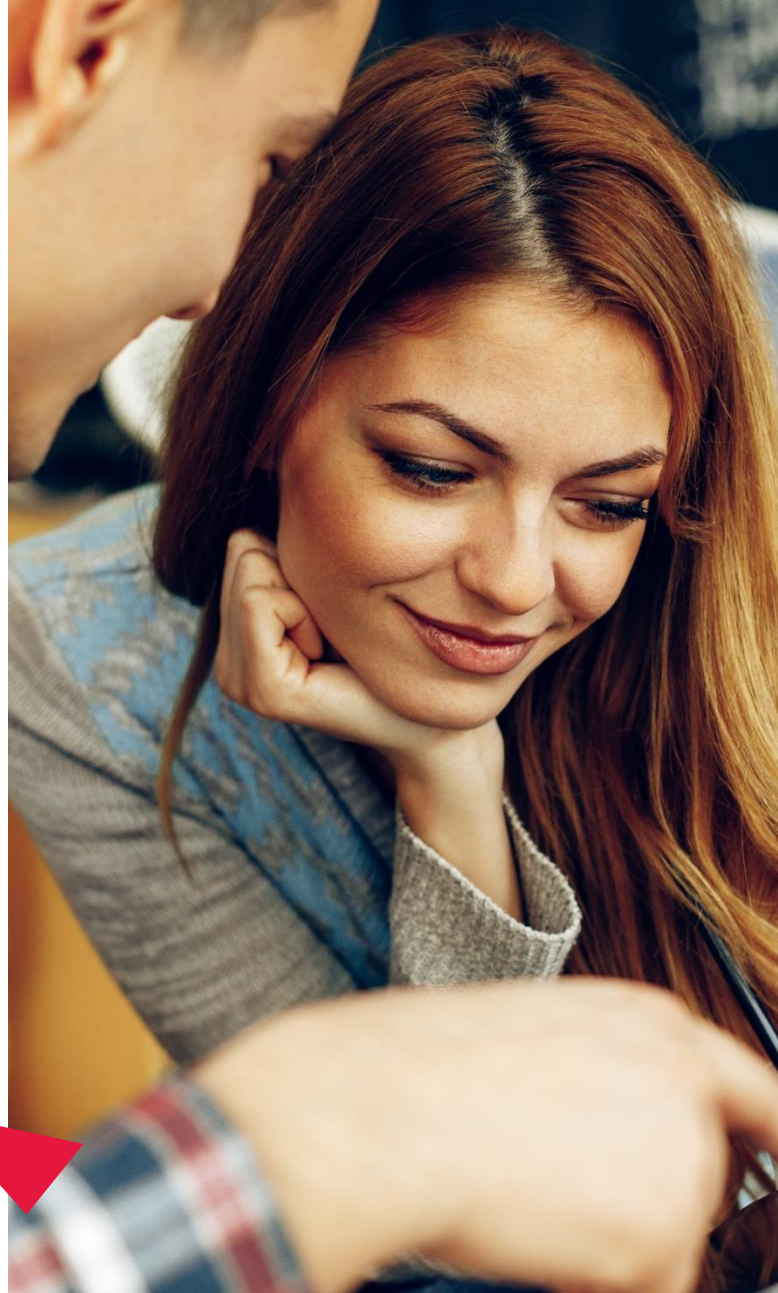
**400 FlexPoints**

## Overview:

Paytronix delivers an online ordering optimization consultation covering online ordering fundamentals and performance strategies, plus 1 hour of post-workshop support.

- Pre-Workshop Discovery: Client completes pre-workshop questionnaire within one (1) week. Paytronix will then develop customized workshop materials using questionnaire responses and additional content.
- Program Workshop (3 hours): Paytronix Strategy & Analytics experts guide clients through: Online ordering program fundamentals and best practice; Key performance metrics for online ordering; and Review of best practice campaigns.
- Post-Workshop Consultation: Up to one (1) hour of consultation within two weeks post-workshop for questions about workshop content. No additional analysis or incremental content provided during consultation and the Paytronix S&A team is not responsible for executing chosen recommendations

[Find out more](#)



**Available for: Paytronix**

## Expected Outcome:

Following this workshop, you will have an understanding of how best to drive a successful online ordering program with an outline of metrics to be focused on as well as campaigns to execute for impact.

## Prerequisites:

Needs Paytronix Online Ordering



# Loyalty KPI Health Report

SC-0005 - Strategic Engagements - Updated: 07/30/2025



320 FlexPoints

## Overview:

Paytronix Strategy & Analytics experts will develop a custom report utilizing the client's *loyalty only* data including:

- **KPI Scorecard:** Quarter-over-quarter snapshot including: Loyalty Spend; Loyalty Visits; Visiting Loyalty Accounts; Loyalty Registrations; Loyalty Spend per Visit; Loyalty Frequency; Loyalty Retention.
  - Paytronix will include data from the 2 most recently completed quarters.
  - Paytronix will NOT include KPIs that require total check details (i.e. loyalty penetration and loyalty conversion)
- **KPI Trend Data:** KPI trends by month, year over year (for available data) with one page for each KPI in the scorecard.
  - Paytronix will NOT include KPIs that are not included in the KPI Scorecard.
  - Paytronix will NOT be addressing questions on KPIs or Trend Data after the report is delivered.

Find out more



Available for: Paytronix

## Expected Outcome:

Better understanding of your loyalty program health through core KPI measurements

## Prerequisites:

Needs Paytronix Loyalty

# Guest Website Updates

SC-0006 - Configurations and Customisation - Updated:  
07/30/2025



Quote on request

## Overview:

The Paytronix branded guest website is an optional complimentary product for customers who use Paytronix to manage their loyalty, gift and/or eClub programs. Your guests can use this website to check balances on gift cards, purchase egift cards, and sign up for and access their loyalty accounts, among other features. This website is not meant to be the primary website for your brand, but it can be customized to fit with your main website and overall branding.

The Guest Website Tool gives you access to customize key elements, including theme, colors, logo, button labels and much more.

If you need support with more advanced modifications—such as editing registration fields, updating navigation links, adding banner images or disclaimer text, or implementing significant design changes—this service is for you. It also covers full site redesigns and extensive custom styling.

By selecting this service, our HTML Support Specialists will collaborate with you to transform your ideas and mockups into fully functional, visually polished email templates or guest website components.

[Find out more](#)



Available for: Paytronix

## Expected Outcome:

You'll receive an updated guest website — crafted from your ideas, mockups, or brand guidelines.

## Prerequisites:

0



# Email Builder Email Redesigns

SC-0007 - Configurations and Customisation - Updated: 07/30/2025



Quote on request

## Overview:

Email Builder is a versatile drag-and-drop design tool that empowers you to effortlessly create personalized email campaigns that align with your brand. If you'd prefer to have Paytronix bring your ideas and mockups to life or would like a custom master template to streamline your own email creation, this service is designed for you.

Find out more



Available for: Paytronix

## Expected Outcome:

You receive professionally designed, fully branded templates tailored to your marketing goals and creative vision. These reusable templates are optimized for performance, compatible across devices, and easy to update using the Email Builder tool—enabling your team to launch campaigns faster, maintain brand consistency, and reduce reliance on design or technical resources.

## Prerequisites:

0



# Local Store Marketing (LSM) Setup & Training

SC-0008 - Configurations and Customisation - Updated: 07/30/2025



370 FlexPoints

## Overview:

Paytronix provides a Local Store Marketing (LSM) Solution to merchants who have local store owners, franchisees, or general managers who wish to send out their own emails. Emails that the local store users send out are subject to approval by up to two rounds of review. With this service, Paytronix will set up LSM, import LSM-specific email templates and train corporate contacts to correctly administer LSM users in our system. Please note, LSM is not available for mobile messages.

[Find out more](#)



Available for: Paytronix

## Expected Outcome:

After setup and training, local store owners, franchisees, or general managers at the merchant will be empowered to create their own emails independently and sent to their local audience with approval from the Corporate office.

## Prerequisites:

Needs Messaging

# Change your Email Domain for Messaging

SC-0009 - Configurations and Customisation - Updated: 07/30/2025



370 FlexPoints

## Overview:

If you'd like to change the domain portion of your address, select this service. While the process is more complex, Paytronix Support will collaborate with our Engineering team to implement your custom domain that can be used for all Paytronix email communications.

[Find out more](#)



Available for: Paytronix

## Expected Outcome:

The service outcome for implementing a new custom email domain for Paytronix emails is:

- **Branded Email Identity:** All Paytronix-generated emails are sent from your custom domain, reinforcing brand trust and recognition.
- **Consistent Customer Experience:** Unified branding across digital touchpoints, creating a seamless experience for recipients.

## Prerequisites:

0



# Program Revamp

SC-0010 - Configurations and Customisation - Updated:  
07/30/2025



Quote on request

## Overview:

The Paytronix Program Relaunch service helps you update your existing rewards program to better engage your customers and meet evolving business goals. Whether you're changing how rewards are earned and redeemed, updating your communications, or adding new features, this service guides you through every step of the relaunch.

**What's Included:** Expert program review, feasibility consultation, technical analysis, implementation planning, formal Statement of Work, and end-to-end support from configuration to post-launch.

**Perfect For:** Low participation programs, outdated rewards, poor customer experience, or when you need competitive differentiation.

User Acceptance Testing (UAT) sign-off required before live deployment. Learn more about UAT at:

<https://paytronix.my.site.com/help/s/article/000001811>

Find out more



Available for: Paytronix

## Expected Outcome:

The service outcome of a loyalty program revamp is a more effective loyalty program that:

- Enhances customer engagement and satisfaction through updated rewards, simplified processes, and clearer communication.
- Improves program performance by aligning features and strategy with current business goals and customer expectations.
- Provides a consistent, upgraded experience across all channels (in-store, online, mobile, etc.).
- Increases participation and retention rates by making the program more appealing and relevant.
- Ensures technical and operational readiness through coordinated implementation and support across all necessary systems.

## Prerequisites:

Needs Paytronix Loyalty

# Refer-A-Friend Setup

SC-0011 - Configurations and Customisation - Updated:  
07/30/2025



370 FlexPoints

## Overview:

Add a seamless referral feature to your loyalty program that lets customers invite friends and earn rewards for successful sign-ups.

**How does "Refer-a-Friend" Work:** Let's say Derek is a loyal customer of Pizzaland and loves earning points through the Pizza Rewards program. He wants his friend Jennifer to enjoy the same perks.

- **Referral Invitation:** Derek logs into his Pizza Rewards account and clicks on the "Refer a Friend" option. From there, he sends Jennifer a personalized referral email containing a unique sign-up link. Friend Joins the Program: Jennifer receives the email, clicks the unique link, and signs up for Pizza Rewards. This link automatically associates her new account with Derek's referral.

- **Reward Trigger:** Once Jennifer makes her first purchase using her new Pizza Rewards card, Derek's account is automatically credited with a referral bonus—be it points, a discount, or a free item.

User Acceptance (UAT) sign-off required before live deployment. Learn more about UAT at <https://paytronix.my.site.com/help/s/article/000001811>

Find out more



Available for: Paytronix

## Expected Outcome:

When the Refer-A-Friend program is implemented, you can expect to see:

- Increased Customer Acquisition: Drives organic growth through word-of-mouth referrals.
- Greater Customer Engagement: Turns existing customers into brand advocates, boosting their lifetime value.
- More Cost-Effective Marketing: Minimizes dependence on paid advertising by utilizing customer networks.

## Prerequisites:

Needs Paytronix Loyalty and App Update, if Necessary



# eClub Account Upload (One-Time)

SC-0012 - Configurations and Customisation - Updated: 07/30/2025



190 FlexPoints

## Overview:

Streamline new member enrollment by uploading customer emails in bulk. The system automatically generates unique loyalty card numbers and enrolls customers into your eClub program through a secure, one-time upload process.

### How It Works:

- **Data Collection:** Customer emails are gathered through external campaigns, events, or third-party platforms.
- **Bulk Upload:** The collected data is uploaded into the system using a standardized file format (e.g., CSV). Each email entry is processed to generate a unique loyalty card number.
- **Automatic Assignment:** The system assigns each generated card number to the corresponding email address and enrolls the customer into the eClub program.

Find out more



Available for: Paytronix

## Expected Outcome:

- Unique card numbers generated/activated and linked to each email address.
- Secure and scalable process for handling large volumes of customer data.
- Accelerated Member Growth: Quickly expands the eClub member base by leveraging external data sources.
- Improved Marketing Reach: Enables targeted email campaigns and promotions to newly enrolled members.
- Operational Efficiency: Saves time and reduces errors associated with manual data entry.
- Enhanced Customer Engagement: Ensures new members are immediately ready to receive rewards and communications, increasing early engagement.

## Prerequisites:

Needs eClub

# Recurring eClub Account Upload

SC-0013 - Configurations and Customisation - Updated: 07/30/2025



370 FlexPoints

## Overview:

Streamline new member enrollment by uploading customer emails in bulk. The system automatically generates unique loyalty card numbers and enrolls customers into your eClub program through a secure, one-time upload process.

This is a recurring upload and requires a previously configured SFTP. If a SFTP has not been configured, please see the SFTP Setup catalog item.

### How It Works:

- Data Collection: Customer emails are gathered through external campaigns, events, or third-party platforms.
- Bulk Upload: The collected data is uploaded into the system using a standardized file format (e.g., CSV). Each email entry is processed to generate a unique loyalty card number.
- Automatic Assignment: The system assigns each generated card number to the corresponding email address and enrolls the customer into the eClub program.

[Find out more](#)



Available for: Paytronix

## Expected Outcome:

- Gives you the ability to self-service and add email addresses to your eClub.
- Unique card numbers generated/activated and linked to each email address.
- Secure and scalable process for handling large volumes of customer data.
- Accelerated Member Growth: Quickly expands the eClub member base by leveraging external data sources.
- Improved Marketing Reach: Enables targeted email campaigns and promotions to newly enrolled members.
- Operational Efficiency: Saves time and reduces errors associated with manual data entry.
- Enhanced Customer Engagement: Ensures new members are immediately ready to receive rewards and communications, increasing early engagement.

## Prerequisites:

Needs eClub and SFTP



# Map New POS to Existing Program

SC-0014 - Integrations - Updated: 07/30/2025



**370 FlexPoints**

## Overview:

Paytronix provides comprehensive support for businesses transitioning from one Point-of-Sale (POS) system to another—whether for a single location or across an entire enterprise.

Our service ensures a smooth migration by evaluating key factors such as cross-platform POS functionality, preserving guest experience, configuring menus accurately, and maintaining loyalty program continuity.

We work closely with your team to scope the migration project, align the rollout strategy with your operational needs, and minimize disruption to your business. Importantly, we ensure all eligible rewards and loyalty features are carried over and remain functional where supported, on your new POS platform.

[Find out more](#)



**Available for: Paytronix**

## Expected Outcome:

A fully scoped and strategically planned POS transition that delivers:

- Seamless continuity of loyalty programs and guest experiences
- A well-structured rollout that minimizes downtime and operational risk
- Menu and functionality alignment between old and new systems where supported
- Confidence in platform functionality across all service channels

## Prerequisites:

0

# Paytronix SFTP Setup

SC-0015 - Configurations and Customisation - Updated:  
07/30/2025



**370 FlexPoints**

## Overview:

This service provides the secure setup of an SFTP site to support both automated, scheduled report delivery from the Paytronix platform and secure file uploads. Leveraging public/private key authentication, the setup ensures robust data protection and compliance with security standards. It is ideal for organizations seeking to streamline access to recurring reports and enable secure data exchange through scheduled or manual file transfers.

[Find out more](#)



**Available for: Paytronix**

## Expected Outcome:

Upon completion of this service, you will have a fully configured and secure SFTP environment designed to support both automated report delivery and file uploads.

## Prerequisites:

0





# Enable Existing Integration

SC-0016 - Configurations and Customisation - Updated:  
07/30/2025



**370 FlexPoints**

## Overview:

Seamlessly connect your existing systems including online ordering, loyalty programs, and POS platforms with Paytronix. Whether you're using Toast, Brink, DoorDash Storefront, or other platforms, we ensure secure, tailored integration with minimal operational disruption.

Our team manages the complete process from initial scoping to final deployment, handling technical setup and third-party coordination. Experience smooth configuration, thorough testing, and confident launch with expert support at every step.

A list of available integrations can be found at <https://paytronix.my.site.com/help/s/article/000002442>.

If you have any questions about the integrations listed there, or if you're looking for a specific integration that does not appear, please contact Paytronix Support. They will guide you to the appropriate service, whether that involves enabling an existing integration or initiating a new integration certification.

[Find out more](#)



**Available for: Paytronix**

## Expected Outcome:

By the end of this service, your selected integration will be fully deployed, tested, and live in your production environment. You'll be able to: Seamlessly process transactions or data through the integrated platform Enhance customer experience with real-time functionality (e.g., loyalty balance checks, online orders) Operate with confidence knowing the integration has been tested and validated for your specific environment.

## Prerequisites:

0

# Existing Integration Re-Certification

SC-0017 - Integrations - Updated: 07/30/2025



Quote on request

## Overview:

Our Existing Integration Re-Certification service ensures that your current integration remains aligned with evolving business needs, platform updates, and technical standards. Whether you're adding new functionality, updating data flows, or responding to changes in third-party systems, this service provides a structured approach to revalidating and enhancing your integration. We work closely with your team and any external partners to scope the changes, implement updates (such as new API endpoints or configuration adjustments), and thoroughly test the integration to ensure continued reliability and performance.

[Find out more](#)



Available for: Paytronix

## Expected Outcome:

By the end of this service, your existing integration will be re-certified with updated functionality and verified performance. You'll be able to:

- Maintain compatibility with evolving systems and requirements
- Add new capabilities or data flows without disrupting existing operations
- Operate with confidence knowing your integration has been tested, documented, and approved for continued use

## Prerequisites:

0



# New Integration Certification

SC-0018 - Integrations - Updated: 07/30/2025



Quote on request

## Overview:

Ready to launch a new integration? Submit this request to schedule a meeting with a Paytronix Support Specialist who will gather requirements before engaging our Integrations team.

### Initial Discussion Topics:

Integration type (POS, guest website, online ordering)

Required services: Loyalty features (SSO, points, rewards, SMS), Gift cards, eGift, Subscriptions, and other applicable features

Desired deployment timeline

### Next Steps:

Following requirements gathering, our Integrations team conducts a detailed Deployment Interview (IDI) covering your requirements, user flows, integration process, milestones, and appropriate REST API calls to ensure all stakeholders are aligned

After the IDI, you'll receive a formal project scope and flex point estimate for approval

Learn more about our APIs at: <https://developers.paytronix.com/>

Find out more



Available for: Paytronix

## Expected Outcome:

Once a new integration has been created and passed the Paytronix Certification process, it is ready to be deployed to production. Functionality and edge cases should be tested on production to confirm that the Integration is working properly.

## Prerequisites:

0

# SMS Setup

SC-0019 - Configurations and Customisation - Updated:  
07/30/2025



Quote on request

## Overview:

Our SMS Messaging Enablement service allows your brand to connect with guests through personalized, real-time text messaging. We work with our SMS provider to provision either a dedicated 10-digit long code (10DLC) or a short code, depending on your messaging needs and volume.

During the commissioning process, we can simultaneously configure your SMS channel for features like text-to-join, text to check in, and text to enroll from the POS where supported. Whether you're launching a loyalty program, sending offers, or enabling guest engagement, we ensure your SMS setup is compliant, reliable, and tailored to your goals.

Find out more



Available for: Paytronix

## Expected Outcome:

By the end of this service, your SMS messaging channel will be fully provisioned, configured, and ready to use. You'll be able to:

- Send and receive SMS messages using a dedicated long code or short code
- Engage guests with timely, targeted messages
- Operate within industry compliance standards (e.g., carrier regulations, opt-in/opt-out)

## Prerequisites:

0



# SMS Text to Enroll

SC-0020 - Configurations and Customisation - Updated: 07/30/2025



370 FlexPoints

## Overview:

Text to Enroll (sometimes called Text to Join) is a guest enrollment method that is initiated via text message. We can support Text to Enroll with or without a keyword. In order to use Text to Enroll, a merchant must have completed the provisioning process for a 10-digit long code or SMS shortcode.

Find out more



Available for: Paytronix

## Expected Outcome:

Increased Loyalty Enrollment Rates: Customers can enroll in loyalty with minimal effort, reducing barriers to entry compared to traditional methods. Higher Customer Capture: More customers are added to the database, even if they don't complete sign-up immediately, allowing for follow-up marketing.

## Prerequisites:

0

# SMS Text to Enroll from the POS

SC-0021 - Configurations and Customisation - Updated: 07/30/2025



370 FlexPoints

## Overview:

This feature lets customers give their number to a server/cashier, who types it into the POS. They then receive a confirmation text and instructions about how to finish signing up. This is only available with the following POS systems:

- Cake
- rPower
- Micros
- Aloha
- OneDine (Partner)
- Revel

[Find out more](#)



Available for: Paytronix

## Expected Outcome:

**Increased Loyalty Enrollment Rates:** Customers can enroll in loyalty with minimal effort, reducing barriers to entry compared to traditional methods.  
**Enhanced Staff Enablement:** Staff can proactively drive sign-ups at the register or table, turning every transaction into a loyalty opportunity.  
**Higher Customer Capture:** More customers are added to the database, even if they don't complete sign-up immediately, allowing for follow-up marketing.  
**Seamless Guest Experience:** Enrollment fits naturally into the checkout flow, without disrupting the ordering or dining experience.

## Prerequisites:

0



# SMS Text to Checkin

SC-0022 - Configurations and Customisation - Updated:  
07/30/2025



**370 FlexPoints**

## Overview:

This feature makes use of the check-in functionality at the POS. Customers text a store-specific code to the brand's short or long code and receives a short number code in response that can be used in place of their card number. Store staff can then use the Check In button at the POS to attach their loyalty card to the check and/or use the check-in code in place of a card number.

This feature should work with any POS that supports a short code in place of a card number. This includes most POS systems but does not include Brink.

[Find out more](#)



**Available for: Paytronix**

## Expected Outcome:

**Frictionless Loyalty Identification:** Customers can check in using a simple text interaction—no app, card, or barcode needed. **Improved Staff Efficiency:** Staff can quickly attach loyalty accounts to checks without slowing down service. **Higher Loyalty Participation Rates:** Easier check-in options drive more customers to engage with the loyalty program, increasing adoption and usage.

## Prerequisites:

0

# PXC Installation and Configuration

SC-0023 - Configurations and Customisation - Updated: 07/30/2025



Quote on request

## Overview:

The Paytronix Controller (PXC) is an application on the Back of the House (BOH) server used for many integrations (mainly Aloha, Micros/Symphony, and POSi) which is needed for transactions. It relays information between Front of the House (FOH) terminals and the Paytronix System (PXS) (via the BOH server). It is designed to be easy to install and requires little maintenance for continuous function. The most current installation guide can be found [https://supportpx.com/PxSoftware\\_PXC/OpenJDK/](https://supportpx.com/PxSoftware_PXC/OpenJDK/).

If you would like Paytronix Support to assist with the installation and configuration, select this service.

Find out more



Available for: Paytronix

## Expected Outcome:

Upon completion of this service, the Paytronix Controller (PXC) on your server will be successfully connected to the Paytronix server.

## Prerequisites:

0



# Store Creation

SC-0024 - Configurations and Customisation - Updated: 07/30/2025



100 FlexPoints

## Overview:

Adding a new store to Paytronix is a self-service feature however, if you would like Paytronix to add for you, select this service and Paytronix will create in the system (and online ordering, if applicable) a new store based on the information you provide.

If requesting the setup of a new store owned by a franchisee, please sure the relevant franchisee contact completes the Franchisee Service Agreement and ACH Form - [https://paytronix.formstack.com/forms/franchisee\\_ach\\_agreement](https://paytronix.formstack.com/forms/franchisee_ach_agreement)

If requesting the setting up of a new store owned by corporate, Paytronix will confirm with Paytronix Billing the store code and live date of the new location.

Find out more



Available for: Paytronix

## Expected Outcome:

Upon completion, your new store will be available with Paytronix

## Prerequisites:

0

# Yearly Report Generation

SC-0025 - Analytics/Reporting - Updated: 07/30/2025



Quote on request

## Overview:

For reports in the Report Center that offer a detailed view, you have the ability to run them adhoc on a monthly basis. If you need a consolidated annual version, Paytronix offers this service upon request. To see which reports include a detailed view, visit: <https://paytronix.my.site.com/help/s/article/000002030>.

When requesting this service, a Support Representative will discuss with you what report you would like us to run and the parameters we should use for generation.

Find out more



Available for: Paytronix

## Expected Outcome:

A consolidated annual report is generated based on your specified requirements.

## Prerequisites:

0



# Online Ordering POS Migration

SC-0026 - Upgrade and Migration - Updated: 07/30/2025



**730 FlexPoints**

## Overview:

### 1. Pre Migration Discovery

Client will work with their POS provider to make sure POS is ready for integration - Paytronix will work with key members of the client's team to go over expectations with the POS cutover.

### 2. POS Migration

An Online Ordering expert will guide the client through the setup of a new store using the migrated POS - They will cover Menu Management and POS Settings - They will review the best practices for the POS and how to understand the data flow to the POS.

### 3. POS Migration

Paytronix will provide up to two (2) hours of additional consultation for up to two-weeks post-workshop to address any client questions about the POS Migration.

[Find out more](#)



**Available for: Online Ordering**

## Expected Outcome:

Following this POS Migration, you will have a store on the new POS system and a strong understanding of how to complete other store migrations to a new POS.

## Prerequisites:

Needs Paytronix Online Ordering

# Forgot / Missed Visit Code

SC-0027 - Configurations and Customisation - Updated:  
07/30/2025



**370 FlexPoints**

## Overview:

Give guests a second chance to earn loyalty points after purchases when they forget to identify themselves at checkout. This convenient backup option helps maintain guest satisfaction and engagement.

Paytronix configures key Forgot Visit Code (FVC) settings including daily usage limits per guest, point accrual caps, code expiration timeframes, and POS system updates.

Supported POS Systems:

Micros 3700, Aloha QuickService, Toast, BSL, Revel, Auphan, and Xpient.

Select this service to engage a Paytronix Configuration Specialist who will assist in enabling the Forgot Visit Code functionality for your loyalty program.

[Find out more](#)



**Available for: Paytronix**

## Expected Outcome:

Upon completion of this service, the Forgot Visit Code (FVC) feature will be fully configured and active for your loyalty program. Guests who forget to identify as loyalty members during a purchase will have the ability to retroactively apply loyalty points using their unique Forgot Visit Code, received at the time of purchase.

## Prerequisites:

Needs Paytronix Loyalty (Specific POS Only)



# Subscriptions for Loyalty

SC-0028 - Configurations and Customisation - Updated:  
07/30/2025



**370 FlexPoints**

## Overview:

Our loyalty program offers a subscription option where guests pay a monthly fee for unlimited redemptions of specific rewards. Enrollment is simple through the guest website: log into their loyalty account, visit the Subscriptions page, and enter payment information. Benefits activate instantly upon enrollment, and guests can redeem subscription rewards like standard loyalty rewards while maintaining full control to manage or cancel anytime through their account.

Ready to launch a subscription program for your guests? Select this service to collaborate with a Paytronix Configuration Specialist and bring your program to life.

User Acceptance (UAT) sign-off required before live deployment. Learn more about UAT at

<https://paytronix.my.site.com/help/s/article/000001811>

**Find out more**



**Available for: Paytronix**

## Expected Outcome:

Upon completion of this service, your subscription program will be live and available to guests. Guests can now easily enroll via the guest website, securely provide payment information, and instantly begin accessing their subscription benefits.

## Prerequisites:

Needs Paytronix Loyalty & Messaging

# Virtual Training (Instructor Led)

SC-0029 - Configurations and Customisation - Updated: 07/30/2025



Quote on request

## Overview:

Request a personalized virtual training session to review key platform features. This session is ideal if you need assistance with:

- Navigating and using backend system features.
- Learning how to adjust and manage wallets.
- Understanding reporting capabilities and generating reports.
- Using accounts filters effectively for reporting and campaigns.
- Exploring additional features, you may be able to leverage.

This session is tailored to your program and specific needs to help you get the most out of the platform.

[Find out more](#)



Available for: Paytronix

## Expected Outcome:

Upon completion of this virtual training session, you will gain increased confidence in using the Paytronix platform.

## Prerequisites:

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# FlexPoints Service Catalogue



## About The Access Group

The Access Group is one of the leading providers of business management software to mid-sized UK and Asia Pacific organisations. It helps more than 60,000 customers across commercial and not for profit sectors become more productive and efficient. Its innovative Access Workspace cloud solutions transform the way business software is used, giving every employee the freedom to do more. Founded in 1991, The Access Group employs approximately 5,000 people.

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