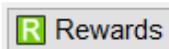


## BayIQ - Two-Way Integration AV Ref # 714

### How To Register / Lookup Rewards Customers:

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

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



 Register BayIQ Customer
✕

**The HITS BPOS customer has been linked to a BayIQ Rewards account**

Customer Name: GUY SMILEY (101491)

---

Rewards Name: C & d Services  
 Rewards Phone: (443) 463-0909  
 Rewards Email: david@asys.com  
 Rewards ID: 11284  
 Rewards Card: 392887803924303  
 Rewards Customer Type: FLEET

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Employee Id:

Physical Card (Optional):

Customer Type (Required):

Allow Text Messages

**Customer Rewards**

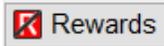
Reward	Type	Code	Points
Reward Dollars \$17.68	Points		884
this is a promotion	Promotion		268
\$25 Off Any Service	Bonus		4
Free Alignment Check	Bonus		9
\$10 Off Any Service	Bonus		10

**TIP: REWARDS are applied using ADJUST TOTAL or ADJUST ITEMS during ticket edit. Available REWARDS, if any, are listed on the Rewards pulldown.**

Register Customer
Lookup REWARDS Customer
Edit BPOS Customer/Contacts
Decline Registration
Done
Suggest Help

- 2. Non-Linked BayIQ customer.** For HITS users who have used BayIQ *prior* to using the two-way integration in HITS, you may have customers that are registered in BayIQ, 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.



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.)

 Find BayIQ Rewards Customer
✕

**Double-Click A Customer To Select**

Rewards Phone, Email, or Name

Find Customer
Cancel & Return To Register Customer
Suggest Help

**Double-Click A Rewards Customer To Link To BPOS**

Name	Email	Phone	Card
Bob Smith	info@gmail.com	(330) 792-1957	035694907578234

(Continued on next page....)

3. **Non-Registered Customer.** If the customer is not a BayIQ Rewards member, the Rewards button will be red.



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...**

(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 Rewards Customer To Link To BPOS

Name	Email	Phone	Card
<div style="display: flex; justify-content: space-between; align-items: center; font-size: x-small;"> <span>^</span> <span>↓</span> </div>			

(Continued on next page....)

After clicking the “Cancel & Return To Register Customer” button,

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

 Register BayIQ Customer
✕

The HITS BPOS customer has \*NOT\* been linked to a BayIQ Rewards account

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Customer Name: JANE SMITH (103354)

---

Rewards Name:  
 Rewards Phone:  
 Rewards Email:  
 Rewards ID:  
 Rewards Card:  
 Rewards Customer Type:

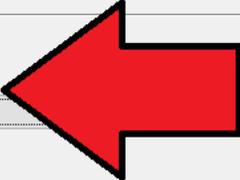
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Employee Id:

Physical Card (Optional):

Customer Type (Required):

Allow Text Messages



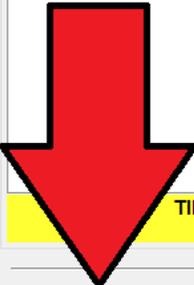
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**Customer Rewards**

Reward	Type	Code
NO REWARDS AVAILABLE	Points	0

TIP: REWARDS are applied using ADJUST TOTAL or ADJUST ITEMS during ticket edit. Available REWARDS, if any, are listed on the Rewards pulldown.

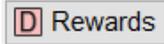
Register Customer
Lookup REWARDS Customer
Edit BPOS Customer/Contacts
Decline Registration
Done
Suggest Help



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.

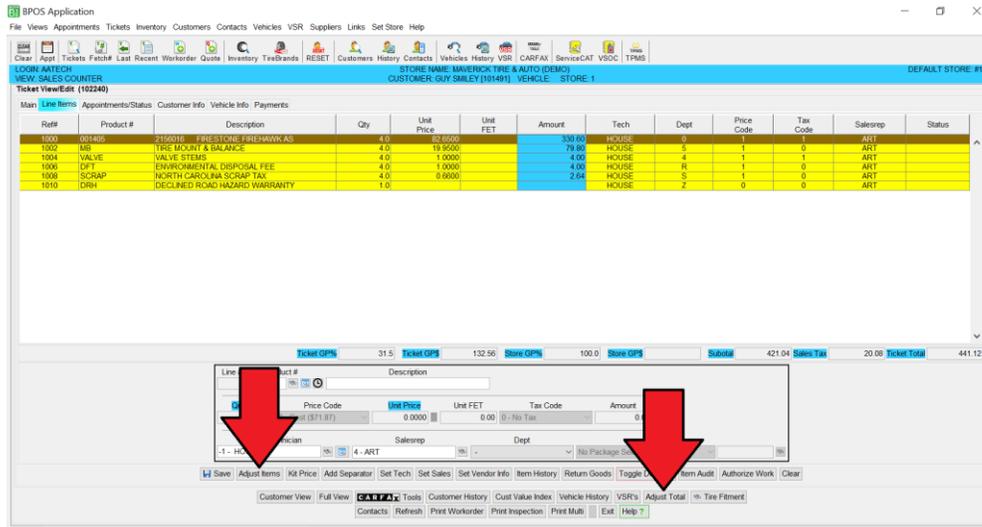
(Continued on next page....)

- 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.

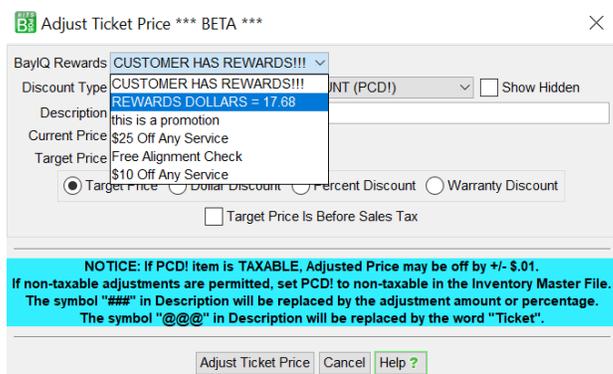


### How To Apply Rewards:

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.



Available Rewards and Promotions will appear in the BayIQ 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.



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