System Settings | Rewards

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REWARDS

Overview

Rewards contains a list of Reward Type Setups. Rewards allows a credit union to create different reward types that define the reward and qualifications.

System Settings - Rewards	
DESCRIPTION	**TYPE**
Kasasa Cash	1
Kasasa Cash with Saver	2
Kasasa Cashback	3
Kasasa Cashback with Saver	6
Kasasa Saver	8
Standard Reward	4

Add Reward

The Rewards setup is broken down into four sections:

- General
- Qualifications
- ATM, Cash Back, Dividend, CD/Loan tabs represent reward parameters
- One Time tab represents new checking reward options

The **Add Reward** screen allows user to enter information related to the reward. The screen can be launched by:

Click	Right Click	Shortcut Key
➕	➕ Add... ✖ Delete	Insert

Add Reward

General | Qualifications | ATM | Cash Back | Dividend | CD / Loan | One Time

Type: Standard

Description:

☐ Override Suffix Title with Description

Reward Transfer Suffix:

YTD Reward Limit:

Save

General		
Field	**Comments**	
Type	Type of Rewards Program	
	Kasasa	Third Party Vendor
	Standard	
Description	Credit Union defined reward program title	
Override Suffix Title with Description	Defines whether system will use description as the suffix title in VIEW, Internet Banking, and Statements.	
Reward Transfer Suffix	Suffix to transfer reward	
Year to Date Limit	Annual Limit	

Qualifications		
Field	**Comments**	
Initial Reward	Defines if member will automatically qualify the first month	
	Automatic	Automatically qualify member
	Must be Earned	Must meet qualifications in first month
ACH Activity	Defines ACH Activity as a qualifier (Yes / No)	
Direct Deposit	Defines Direct Deposit as a qualifier (Yes / No)	
Minimum	Minimum amount of direct deposit qualifier	
Debit Purchases	Number of debit card purchase to qualify	
E-Statements	Defines e-Statements as a qualifier (Yes / No)	
Overdrawn Share	Automatically disqualifies if shares overdrawn	
	Does Not Qualify	
	n/a	
Delinquent Loan	Automatically disqualifies if loans delinquent	
	Does Not Qualify	
	n/a	
Minimum Days		Number of Days Delinquent to disqualify

ATM/Debit	
Field	**Comments**
Refund ATM Charges	Defines if CU ATM Charges will be refunded (Yes / No)
Refund ATM Surcharges	Defines if ATM Surcharges will be refunded (Yes / No)
Refund Draft Charges	Defines if the Monthly Draft Service Charge will be refunded (Yes / No)
Refund Surcharge Limit	Monthly Refund Amount on ATM Surcharges
Combined Refund Limit	Combined Monthly Amount of ATM Refunds

Datamatic VIEW

Add Reward

General | Qualifications | ATM | Cash Back | Dividend | CD / Loan | One Time

	Minimum Balance	Percentage	Maximum Amount
Tier 1:			
Tier 2:			

Save

Cash Back

Field	Comments
Tier 1 Minimum Balance	Minimum balance to earn reward
Tier 1 Percentage	Cash back percentage on debit purchases
Tier 1 Maximum	Maximum cash back reward per month
Tier 2 Minimum Balance	Second Tier minimum balance to earn reward
Tier 2 Percentage	Second Tier percentage of debit purchases
Tier 2 Maximum	Second Tier maximum cash back reward per month

Dividend	
Field	**Comments**
Qualified Type	Dividend Type for accounts that qualified
Un-Qualified Type	Dividend Type for accounts that did not qualify

⚠️ **Important**

Separate Dividend Setup Screens should be configured with for Qualified and Unqualified Types.

CD / Loan	
Field	**Comments**
Bonus Rate	Certificate Bonus Rate
Loan Type	Types of loans types to discount
	(none)
	No
	Consumer
	Mortgages
	All
Discount Rate	Discount Rate
Type	Determines whether reward or rebate
	Interest Rebate
	Reward

Datamatic VIEW   ✕

Add Reward   ✉ 🖶

General | Qualifications | ATM | Cash Back | Dividend | CD / Loan | One Time

Reward Amount: [   ]

Reward Days: [   ]
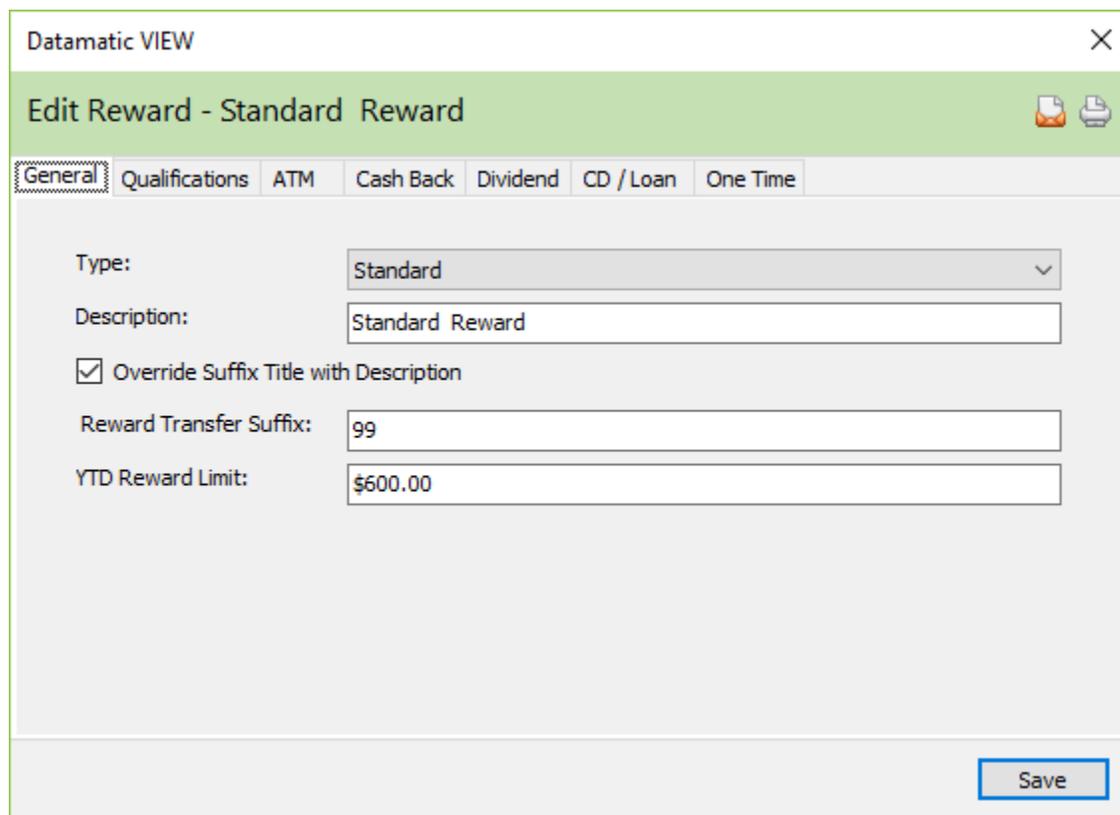
Debit Purchases: [   ]

Save

One Time	
Field	**Comments**
Reward Amount	One-time flat rate reward amount
Reward Days	Number of days required to earn one-time reward
Debit Purchases	Number of Debit Card Purchases to earn one-time reward

Edit Reward

The **Edit Reward** screen allows user to modify the reward.   The screen can be launched by:

Double Click	Right Click	Shortcut Key
Item	None	Enter

Delete Reward

Deleting a Reward Type removes the reward from the system.   Rewards can be deleted by:

Click	Right Click	Shortcut Key
❌	➕ Add... ❌ Delete	Delete

⚠️ **Important**

Deleting a Reward will not remove the reward type from the account suffix. The Reward Type will display (unknown) after a reward type is deleted.