



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.

| DESCRIPTION | TYPE |
|--|------|
|  Kasasa Cash | 1 |
|  Kasasa Cash with Saver | 2 |
|  Kasasa Cashback | 3 |
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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 |
|---|---|---|
|  |  |  |

X
Datamatic VIEW

Add Reward




General
Qualifications
ATM
Cash Back
Dividend
CD / Loan
One Time

Type: Standard v

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 |

X

Add Reward




General
Qualifications
ATM
Cash Back
Dividend
CD / Loan
One Time

Qualifications

Initial Reward: Must be Earned ACH Activity: No

Direct Deposit: No Minimum:

Debit Purchases: E-Statements: No

Non Qualifiers:

Overdrawn Share n/a

Delinquent Loan n/a Minimum Days:

Save

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 |

Datamatic VIEW ✕

Add Reward 📄 🖨️

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

Refund ATM Charges: ▼

Refund ATM Surcharges: ▼

Refund Draft Charges: ▼

Refund Surcharge Limit:

Combined Refund Limit:

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 |

X
Datamatic VIEW

Add Reward




General
Qualifications
ATM
Cash Back
Dividend
CD / Loan
One Time

| | Minimum Balance | Percentage | Maximum Amount |
|---------|---|---|---|
| Tier 1: | <input style="width: 100%;" type="text"/> | <input style="width: 100%;" type="text"/> | <input style="width: 100%;" type="text"/> |
| Tier 2: | <input style="width: 100%;" type="text"/> | <input style="width: 100%;" type="text"/> | <input style="width: 100%;" type="text"/> |

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 |

X
Datamatic VIEW

Add Reward




General
Qualifications
ATM
Cash Back
Dividend
CD / Loan
One Time

Qualified Type:

Un-Qualified Type:

Save

| 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.

Datamatic VIEW ✕

Add Reward 📄 🖨️

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

Certificate Reward

Bonus Rate:

Loan Reward

Loan Type: Consumer ▼

Discount Rate: Type: Interest Rebate ▼

Save

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

×
Add Reward




General
Qualifications
ATM
Cash Back
Dividend
CD / Loan
One Time

Reward Amount:

Reward Days:

Debit Purchases:

Save

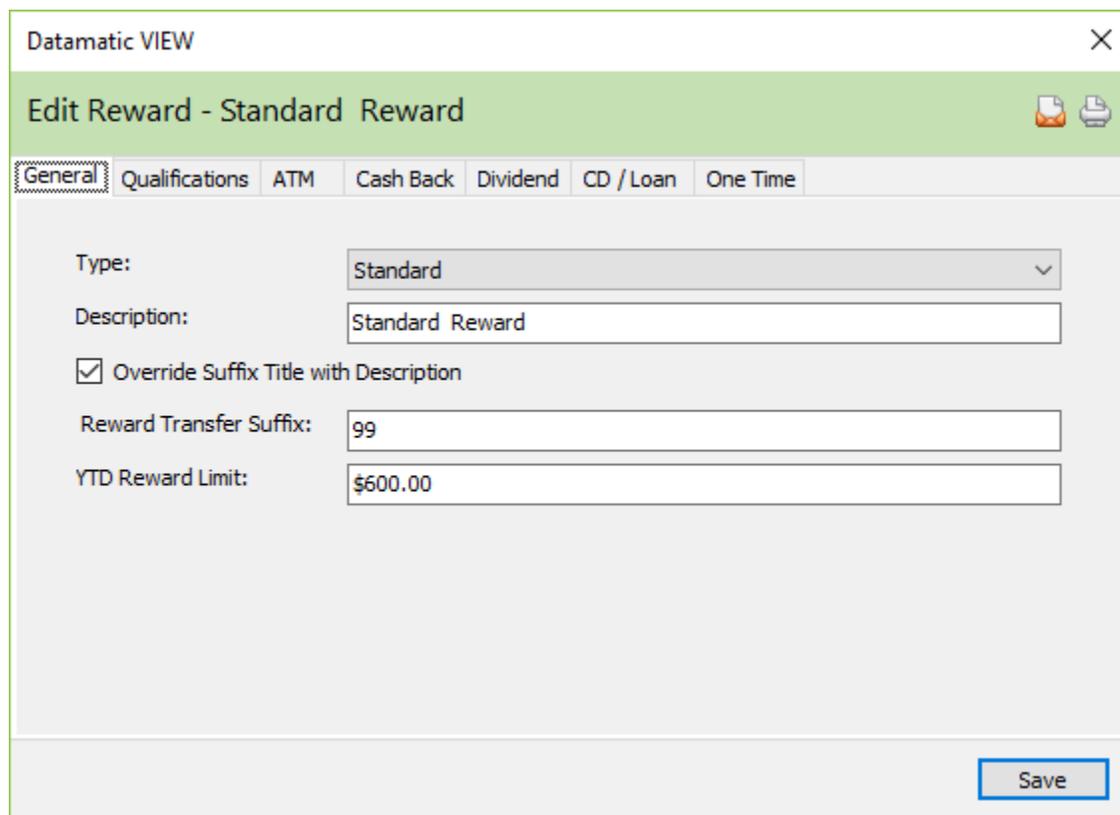
One Time

| 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 |



Datamatic VIEW

Edit Reward - Standard Reward

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

Type: Standard

Description: Standard Reward

Override Suffix Title with Description

Reward Transfer Suffix: 99

YTD Reward Limit: \$600.00

Save

Delete Reward

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

| Click | Right Click | Shortcut Key |
|---|--|---|
|  |  Add...  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.