



Member Consent to T&C

MAY 2018

Introduction

We've created new processes to help businesses get the legally required consent from all their members—ensuring compliance with the GDPR and other privacy regulations.

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Overview

Requirement

Members must provide explicit consent to the program terms to allow the business to collect and process their data—which is required to participate in the loyalty program.

Ways to Consent

Since members must be able to review the terms and agree to them directly, they can only consent through the registration form or update form—which are available from:

- Mobile App
- iFrame (in a website)
- New Landing Page

Ways to Register

Members automatically accept program terms when they register through the app registration form (even if it's presented in a website as an iFrame). But they don't provide it when registered through:

- POS (auto-register)
- Registration API
- Import Members
- Hub

Main Ways to Register

Mobile App

Download the app from the App Store or Google Play

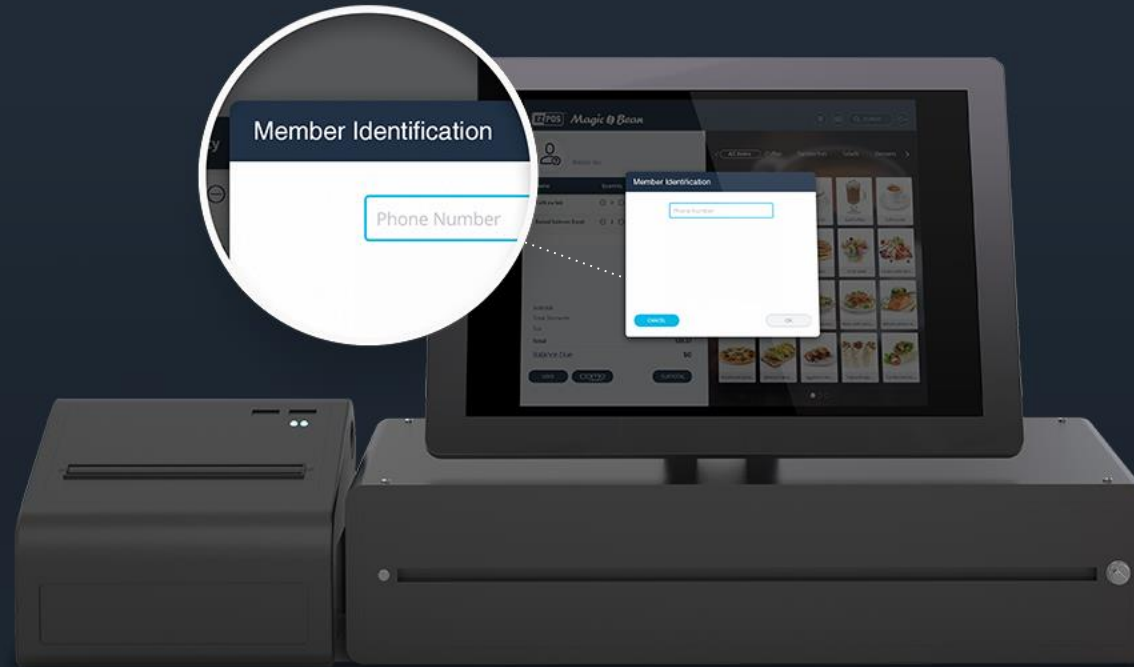
✓ Consent



POS (Auto-Register)

Enter phone number and get SMS link to complete registration

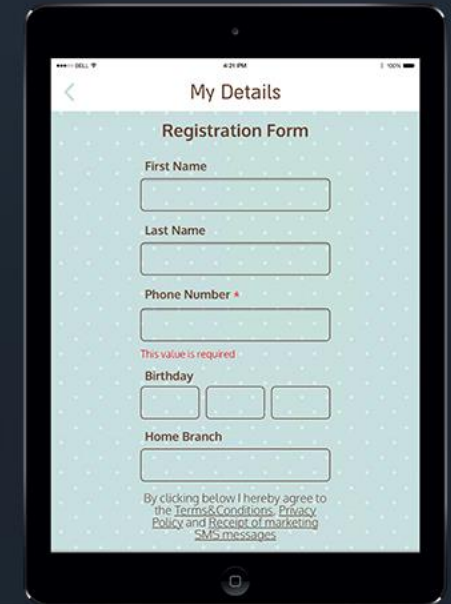
✗ Consent



iFrame

Implement in a website or any customer-facing registration

✓ Consent



When Changes Apply

New Flows

New flows were created to ensure that businesses get the legally required consent from all their members—no matter how they register. There are different flows depending on **how** the member registers, and **when** the member registered.

How

Flows depend on how the member registers: app/iFrame, POS, API, import, or Hub.

When

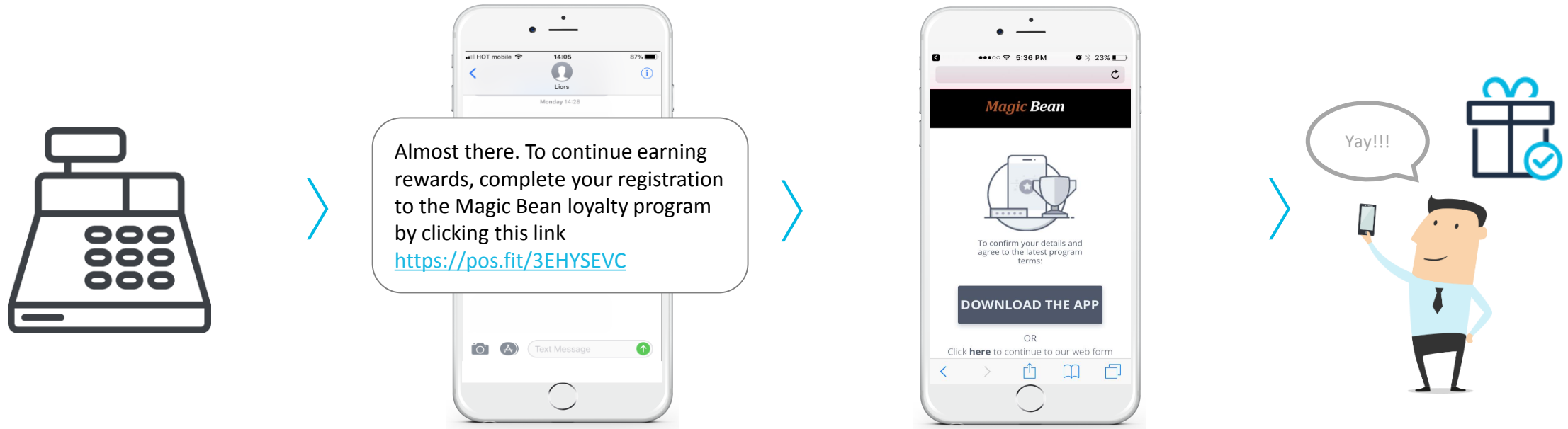
As a gradual release, new consent flows will be implemented in different territories at different times:

- **New Members**—refers to members that register *after* changes are implemented in the relevant territory
- **Existing Members**—refers to members that registered *before* changes were implemented in the relevant territory

For example, if the changes are implemented on May 8, existing members are members that registered before May 8 and new members are members that registered after May 8.

New Members via POS/API

For the first 24 hours, they enjoy all their member benefits. But after 24 hours, they won't be able to participate in the loyalty program until they consent to terms. When they try to identify at the POS, the cashier will see that they didn't consent and they'll get an SMS/email to consent to program terms.



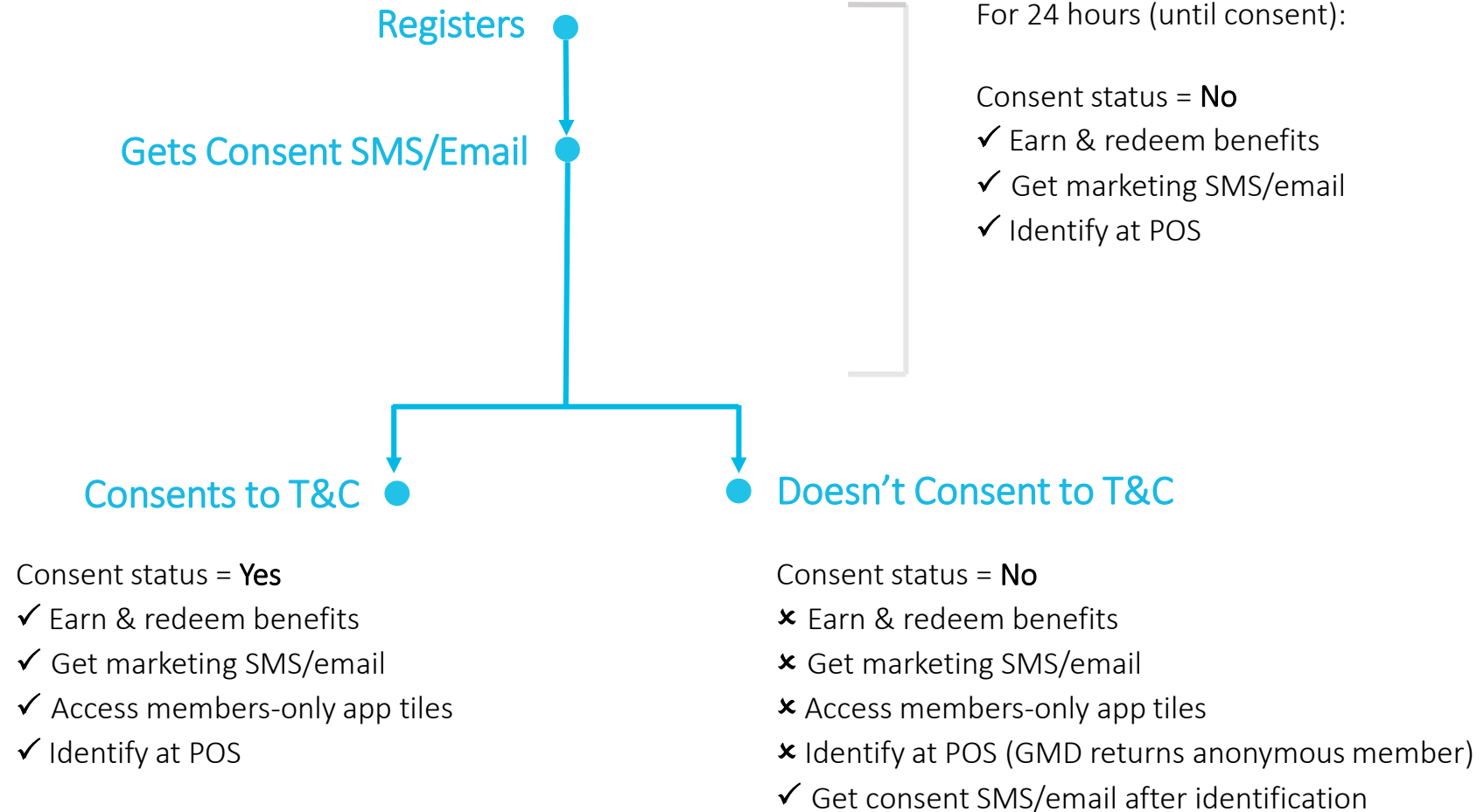
Member registers via POS (auto register), or API (usually website)

Member receives SMS or email with link to complete registration

Within 24hrs, member completes details (and consents) by downloading the app or directly via web form

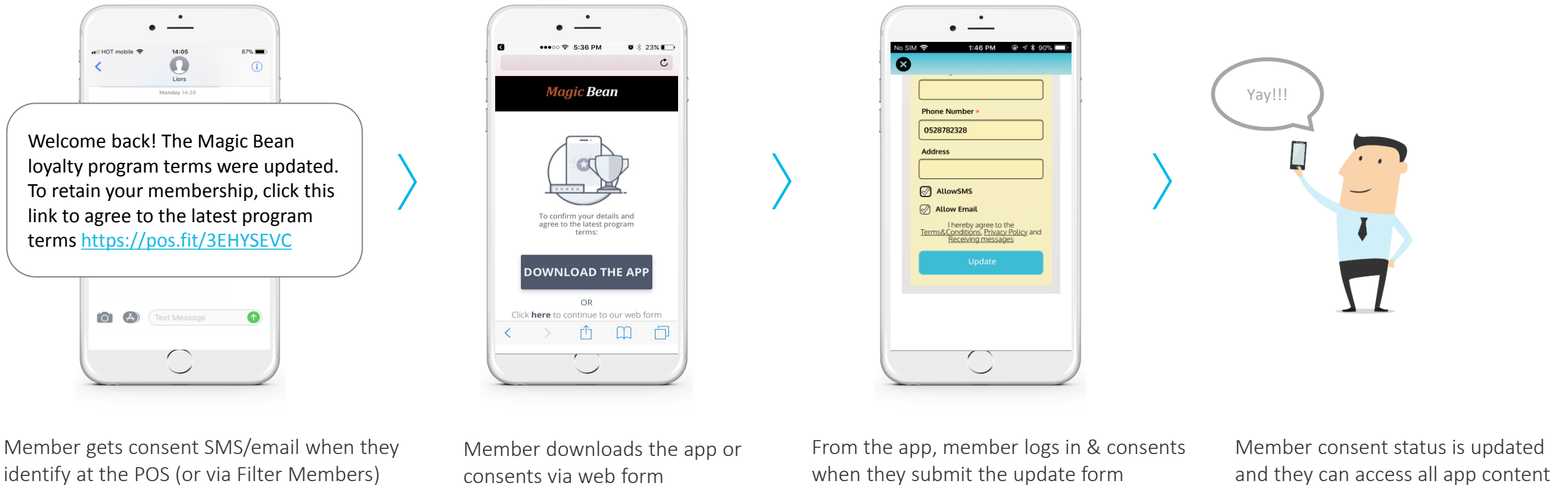
Member can fully participate in the loyalty program

New Members via POS/API

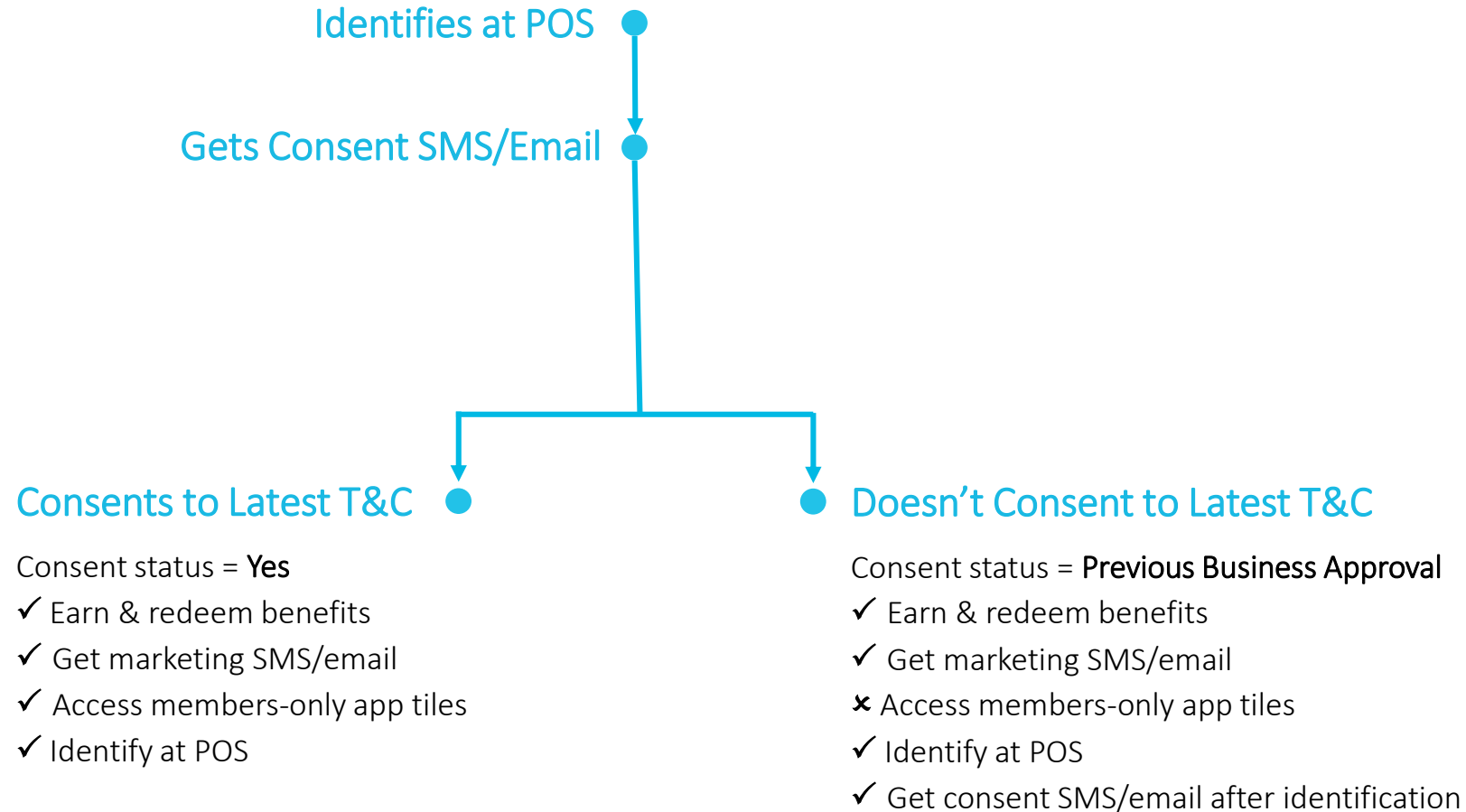


Existing Members

The following flows apply to existing members that both registered outside of the app/iFrame AND never logged into the app. Until they consent, they can't access members-only app tiles, but they can still earn and use all program benefits.

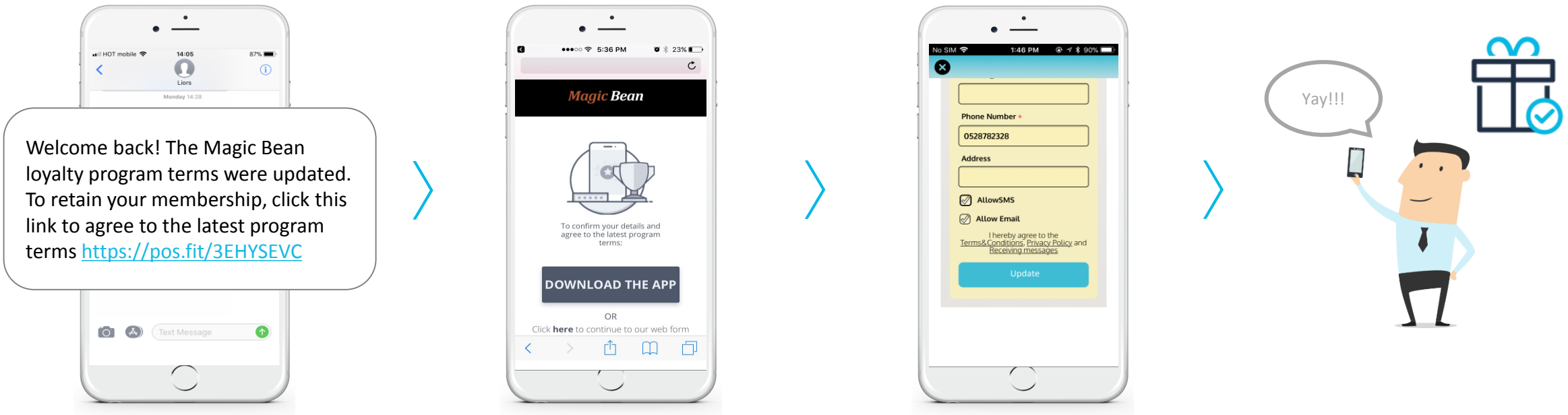


Existing Members



New Members via Import

New imported members cannot participate in the loyalty program until they consent (no 24hr grace period). They won't automatically receive the consent SMS/email after import, but it can be sent from Filter Members. When they try to identify at the POS, the cashier will see that they didn't consent and they'll get an SMS/email to consent to program terms.



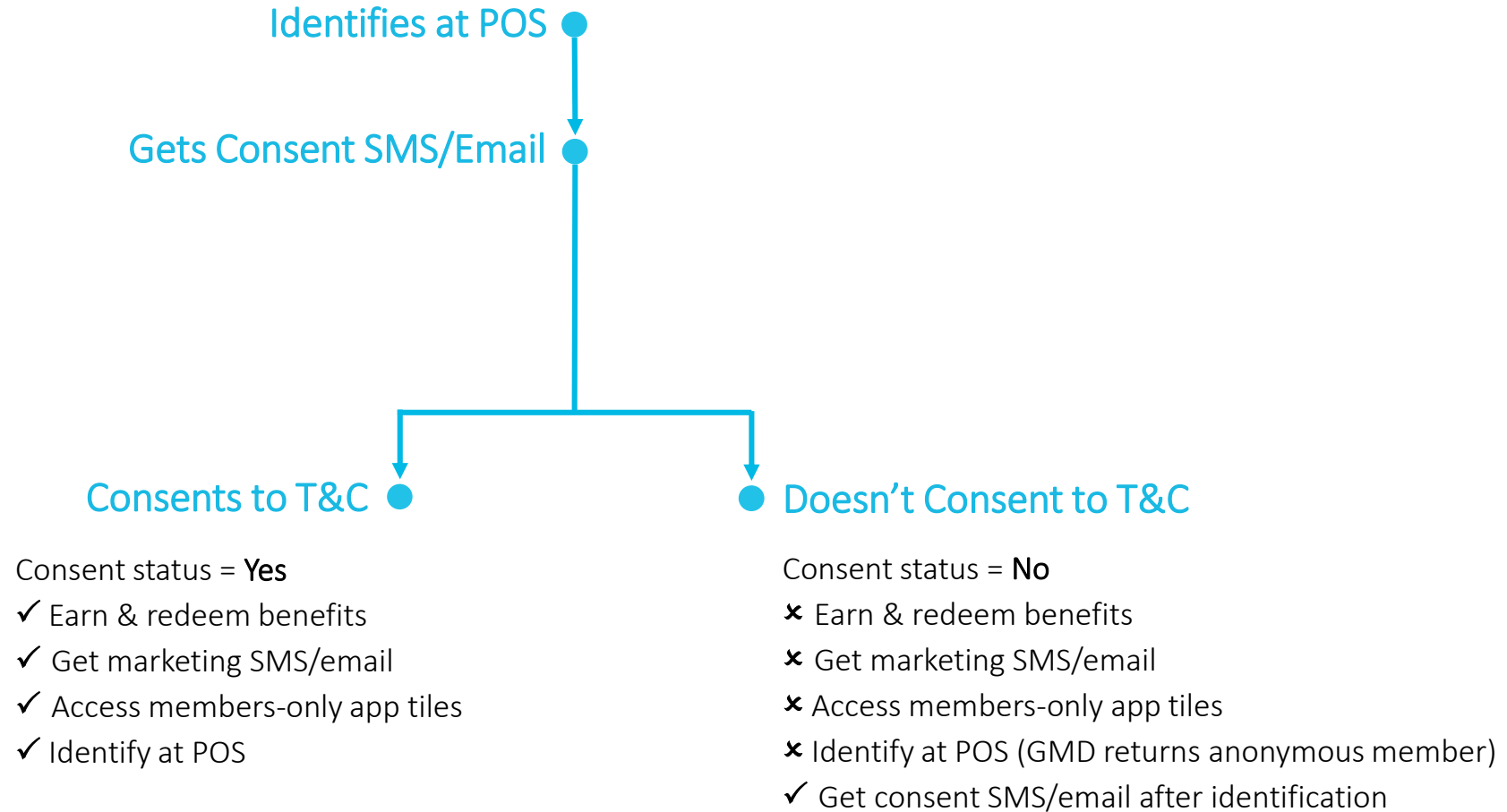
Member gets consent SMS/email when they identify at the POS (or via Filter Members)

Member downloads the app or consents via web form

From the app, member logs in & consents when they submit the update form

Member can fully participate in the loyalty program

New Members via Import



Consent Status

A new field was added to **Filter Members** representing their consent status: **Member Consented to T&C**.

You can filter members according to this field (only when **Membership Status** is **Registered**) and view a member's consent status from their profile.

Filter Members

Find members based on their actions

Membership Status

Registered Un-identified (App user) Pending Payment

Member Consented to T&C

Yes Previous business approval No

Note: By default, Filter Members returns all members (regardless of their consent status). You can technically perform certain actions on members without consent from Filter Members (such as send them a gift) but they won't be able to view it in the app or identify at the POS unless they consent to terms.

Phone: 0506779178

AllowSMS:

AllowEmail:

Points: 4,276

Credit: 26

User Key: cd19CrhZ3sQZ53lCv5BtOfrPnGlGDs9CYZTH9Cw4g88

Membership Key: bs9A7qxN0rgN2202Oak69BIIHIXs07ms9D9DMmeh0AQ2a53SCjpy

Membership Status: registered

Member Consented to T&C: Previous business approval

Consent Status

Status	Description	Received Status By	Program Restrictions
Yes	Member consented	<ul style="list-style-type: none"> New members that register via app or iFrame Any member that updated details via app, iFrame, or Landing Page Existing member that logged into app 	None
No	Member didn't consent	<ul style="list-style-type: none"> New members that register via POS, API, Import, or Hub 	<ul style="list-style-type: none"> ✗ Redeem Benefits ✗ Get marketing SMS/email ✗ Members-only app tiles
Previous Business Approval	Member didn't consent to latest program terms	<ul style="list-style-type: none"> Existing member that registered via POS, API, Import, or Hub New imported members that received special Como approval for this status 	<ul style="list-style-type: none"> ✗ Members-only app tiles

Note: Existing members refer to members that registered before the changes are released in their territory. Before this time, members also consented to terms when they logged into the app. So only existing members that never logged into the app have the Previous Business Approval status. Once a member with this status submits the update form through the app or Landing page, their consent status will change to Yes.

Consent SMS/Email

Members with consent status **No** or **Previous Business Approval** can be sent a dedicated consent SMS/email with a link to the new landing page.

The consent SMS/email can be sent in various ways:

- Automatically when they register
- Automatically when they identify at the POS
- Manually from Filter Members
(Send SMS/Email for T&C Consent)

Filter Members

Member Actions

Export Users

Employee Actions

App Feedback

Import User Keys

Review Receipts

ID Codes

Perform a smart action on the results

Perform the action

Send SMS/Email for T&C Consent

SMS Email

SMS Content

Dear member, the @BusinessName loyalty program terms were updated. To retain your membership, click this link to agree to the latest program terms. @Consent.LandingPageLink

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Notes:

- Message text can be customized but it cannot be sent from Filter Members without the consent link (**@Consent.LandingPageLink**)
- Businesses are charged for the SMS/email (the same as other messages)
- The message is sent without an unsubscribe option since it notifies members of changes in the terms. However, the message may be considered a marketing message if it is sent too often per member.

New Landing Page

This branded new page allows members who registered outside of the registration form to provide consent in different ways:

1. **Mobile App**—Download the app, log in as member, and complete the update form that opens
2. **Web Form**—Complete the update form displayed directly in the landing page

Notes:

- The update form is prefilled with all the member details they provided when they registered. As such, the link to the landing page can only be sent from the dedicated consent SMS/email.
- If the business doesn't have an app, the link to the landing page will open the update form directly.
- Businesses are charged for the SMS/email sent to the member with the link to the landing page (same as other SMS or emails they send).

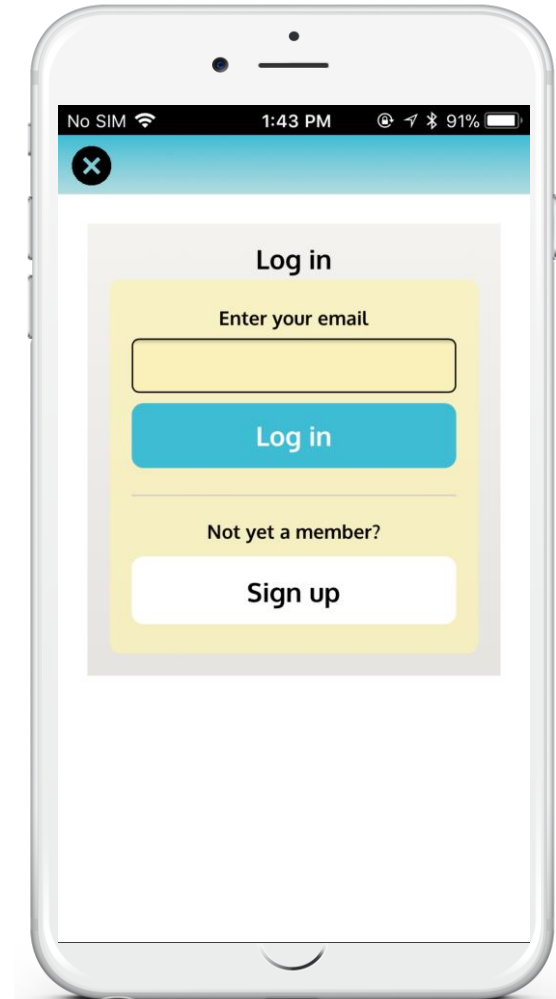


App Login Screen

The app login flow was enhanced to support the new processes:

- ✓ Existing members with consent can login more quickly using the new login screen.
- ✓ Members who didn't yet approve the latest program terms (i.e., consent status *No* or *Previous Business Approval*) are directed to the update form when they login, and cannot access any members-only tiles until they consent to the terms.

Note: App version update (Zapp) is required for the new login screen.



Consent Settings

New settings from **Settings > General POS Settings:**

- If to send consent SMS/email when:
 - Member registers via API
 - Member registers via POS autoregister
 - No consent member identifies
 - No consent imported member identifies
 - Previous consent member identifies
- If to send the message as SMS or email
- Message text (default text can be customized)

Backend configurations:

- *If members can be imported with Previous Business Approval (needs Como legal approval)*
- *Grace period per territory for registration via API/POS*
- *Default texts for consent SMS/email*

Registration

Send SMS/email after registration via API

SMS Email

SMS Content

Almost there! To continue earning rewards, complete your registration to the @BusinessName loyalty program by clicking this link: @Consent.LandingPageLink

(154)

You may be charged more than once if SMS exceeds a certain length (based on language and provider)

POS Membership Purchase Flow

Auto Register

Membership Item Code ✖

Send SMS after membership purchase

SMS Email

SMS Content

Almost there! To continue earning rewards, complete your registration to the @BusinessName loyalty program by clicking this link: @Consent.LandingPageLink

(154)

You may be charged more than once if SMS exceeds a certain length (based on language and provider)

Identification (getMemberDetails)

Send SMS/email when member without consent identifies

SMS Email

SMS Content

Welcome back! To earn rewards, you'll need to complete your registration to the @BusinessName loyalty program by clicking this link: @Consent.LandingPageLink

(157)

You may be charged more than once if SMS exceeds a certain length (based on language and provider)

Send SMS/email when imported member without consent identifies

SMS Email

SMS Content

Welcome back! To earn rewards, you'll need to complete your registration to the @BusinessName loyalty program by clicking this link: @Consent.LandingPageLink

(157)

You may be charged more than once if SMS exceeds a certain length (based on language and provider)

Send SMS/email when member with previous business approval identifies

SMS Email

SMS Content

Welcome back! The @BusinessName loyalty program terms were updated. To retain your membership, click this link to agree to the latest program terms. @Consent.LandingPageLink

(173)

You may be charged more than once if SMS exceeds a certain length (based on language and provider)

Marketing SMS/Email

Here are the main enhancements related to marketing SMS/email:

No Marketing Messages to Members Without Consent

Members who do not explicitly consent to program terms will not receive marketing messages—even if they subscribe (ex: Allow SMS=Yes). However, they will still receive operational messages.

New Value for Allow SMS/Allow Email – “None”

When members register without an option to subscribe (such as via auto-register), Allow SMS = None and Allow Email = None. Only once they consent to program terms, *None* will be changed to *Yes*. This is to ensure that members will not be subscribed to marketing messages unless they either explicitly subscribe, OR consent to program terms.

Registration Form

The business can still choose whether or not to provide members with the option to explicitly allow marketing SMS or email from the registration form. If they don't add the fields to the form, members are subscribed by default once they consent to program terms (Allow SMS/Email=Yes).

Restrictions for Subscribing

To prevent unauthorized subscribing to marketing messages, members who unsubscribed (ex: Allow Email=No) cannot be later subscribed via Import, API, or Hub. They can only subscribe themselves from the update form in the app, or iFrame (if the option is provided by the business).

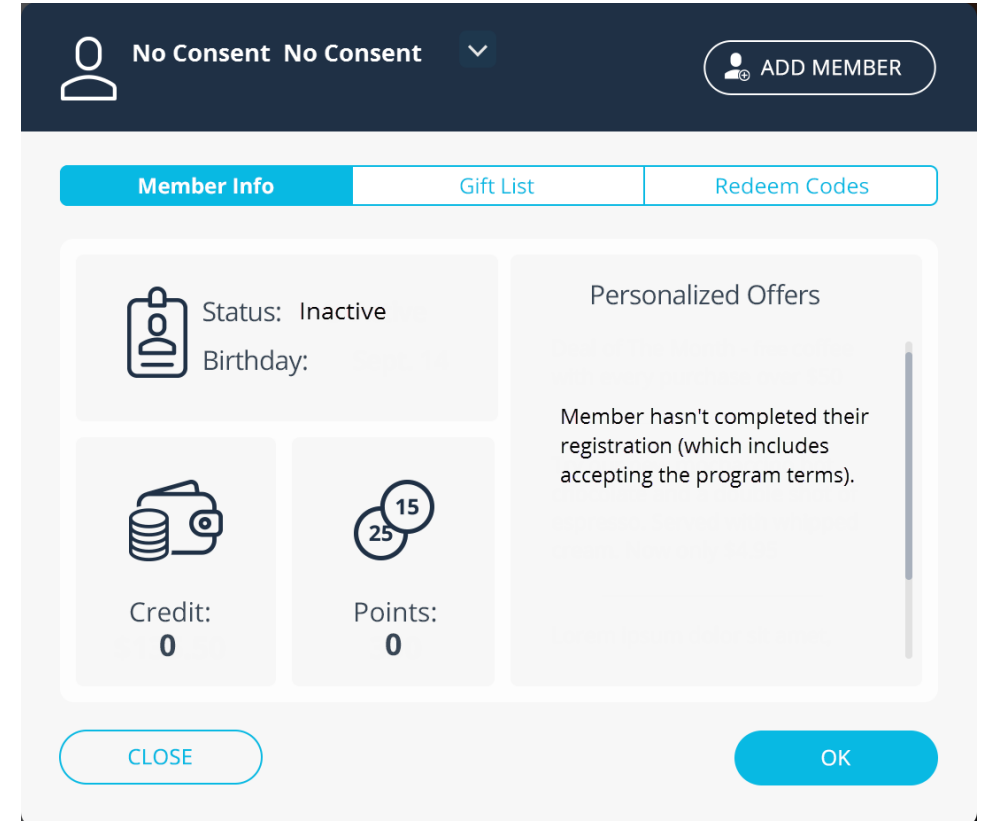
Consent & POS API

For members with *No* consent status, here's what happens at the POS:

1. **getMemberDetails** returns values for an anonymous member
2. Consent SMS/email is sent to the member to agree to terms
3. **getBenefits** and **payment** return an error: "Customer(s) not found"
4. **submitPurchase** succeeds but we'll treat this purchase as anonymous

For getMemberDetails:

- First name and last name are both sent as *No Consent*
- Points and credit are sent as *0*
- Status is sent as *Inactive* for 4.0 but *Registered* for 2.8
- No gifts are returned
- Member notes are returned as *Member hasn't completed their registration (which includes accepting the program terms)*.
- Any fields the POS expects will be returned but anonymized



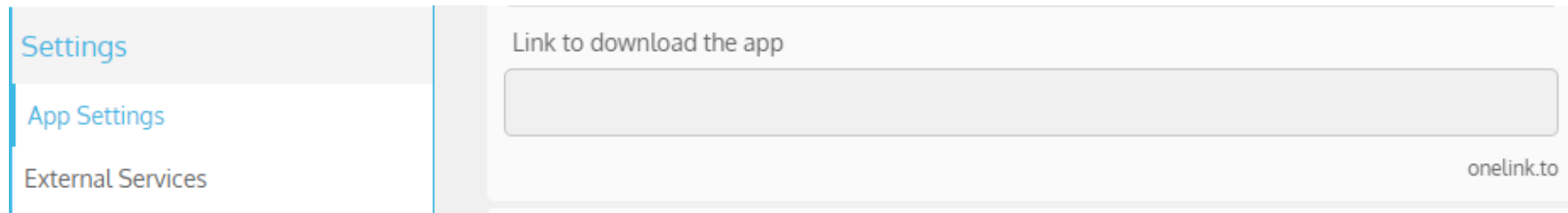
Consent Logs

New logs can appear in the member's profile in the Hub, and some existing logs were enhanced with a source.

Log	Description
SMS sent to member for T&C consent (from <source>)	Consent SMS was sent to member from: <ul style="list-style-type: none">• <i>POS</i> – after registration via POS/API, or identification at POS• <i>Hub</i> – from Filter Members
Email sent to member for T&C consent (from <source>)	Consent email was sent to member from <i>POS</i> or <i>Hub</i> (see above)
Joined the program from <source>	Member registered from: <ul style="list-style-type: none">• <i>App</i> – app or iFrame• <i>POS</i> – auto-register• <i>Automation</i> – using Register Member action• <i>Import</i> – via Import Members• <i>Hub</i> – Operation > Registration > Create New Member• <i>API</i> – Registration API, usually via website or POS• <i>Client</i> – source not available, but it can be any of the above sources
Updated membership details from <source>	Member details were updated from <i>App</i> , <i>POS</i> , <i>Automation</i> , <i>Import</i> , <i>Hub</i> , <i>API</i> , or <i>Client</i>
Consented to T&C from <source>	Member consented to terms from: <ul style="list-style-type: none">• <i>App</i> – app or iFrame• <i>Landing Page</i>
Member T&C consent status was updated (system update)	Member's consent status was updated by a data fix (ex: for existing members)

Required Setup

The consent landing page allows members to click a link to download the app. This link can be added from **Operation > Settings > App Settings**:



The screenshot shows a web interface with a left-hand navigation menu and a main content area. The navigation menu includes three items: "Settings", "App Settings", and "External Services". The "App Settings" item is currently selected. The main content area has a heading "Link to download the app" above a large, empty text input field. In the bottom right corner of the main content area, the text "onelink.to" is displayed.

In addition, the new login screen requires a Zapp update.

Thank You



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