Community Gift Cards

Add-Ons / Products

Introduction

As a means to offer your Locations (member businesses) a way of marketing their products, the platform allows them to submit add-on products that can be ordered immediately after a gift card is bought (or an existing gift card is topped up, more on that later). You as the administrator can ensure that only add-ons that "make sense" can be included in this process. As an example, if someone buys a gift card for someone else (or for themselves, more on that later as well), the buyer may want to have a "visitor's guide" shipped to their recipient to go along with the gift card, so that the recipient can plan for their trip to your area, or perhaps the buyer of the card wants to also send flowers. The intent of these add-ons, is to provide some value-add to the card holder, and is not to support an "online shopping" experience … you want card holders to come and visit your area so that they may experience what you have to offer and then return, so these add-ons are not meant to deter visitors.

Settings

The first step is to define some settings that will be used throughout the process. You do this by accessing the Add-Ons/Products section of the dashboard. At the top of the screen are the settings that you can define for this process, including whether to enable add-ons or not. Once you enable add-ons, there are other settings that you can also define:

- Hold-Back Type: When products are bought by card buyers, funds go through your gateway provider into your bank account. There are potentially 3 cost components to you. The first is the gateway provider's fees related to credit card fees; the second is our fee (1 % of the pre-tax price of the product) for offering this functionality to you (this cost is reflected in your Balance in the system); the third (optional) fee is a nominal fee that is assessed related to shipment tracking ($0.05 per product ordered – see Shipment Tracking below). If you want to recoup all (or a portion) of those costs, you may specify that you want to "hold-back" a flat amount or percentage of every add-on product purchase from future disbursements to the locations that are providing those products. Note that if you choose to hold back a percentage, the total amount of the product purchase (including the pre-tax price, the taxes, and the shipping charge), is the basis of the calculation.

- Shipment Tracking: We have partnered with a 3rd party provider that offers tracking functionality for shipments. This provider charges us a fee for using their functionality, and we pass on a small nominal fee per product purchased ($0.05) … you can choose to enable this tracking or not (the fee is debited from your account Balance, at the time that the product was *bought*, depending on whether or not tracking was enabled at the time that the product was purchased). When enabled, this will allow the Location to provide not only confirmation that the product has been shipped, but also can provide the tracking number and the carrier (US Postal Service, CanadaPost, etc., over 100 different carriers are supported). By doing this, we receive real-time updates from the 3rd party, indicating where along the way the shipment is – up until the time that the product has been flagged as "delivered" to the destination address. If you do not enable shipment tracking, your member business will still be able to flag the product as "shipped", but there will be no follow-up on actual delivery nor any communications back to the Location on progress.

- Disbursement Option: Disbursements to your locations are carried out during the normal disbursement cycle/process. At the time that the system collects information regarding which disbursements should occur, you can specify whether the system should include the add-on disbursements based on the following:
  - if you choose to make them eligible at PURCHASE time, then there is no need for the location to flag the product as shipped in order to get paid for it.
  - If you want to institute more rigor, locations will at least need to flag the product as SHIPPED before they get paid (this is the default).

- Buy Mode: By default, add-ons are made available only when someone buys a **new** gift card, for **someone else**, as they are paying for products to be sent to the recipient with their own credit card, as an added bonus to go along with the electronic gift card. However, you can change this by specifying something different, by indicating when add-ons are allowed:
  - New cards: you specify whether add-ons are allowed only when a card is bought for someone else, OR that they are allowed regardless of recipient
  - Top-Ups: you specify whether add-ons are allowed after a card is topped up or not
  - **NOTE**: when someone buys a new card, they are given the option to deliver the new card at a future date. If the buyer chooses this option, add-ons will **NOT** be made available, as shipment status notifications are sent by the system to the recipient as locations flag products as shipped, and this would defeat the purpose of a surprise gift.

- Introduction Text: when add-ons are available, a brief introduction is displayed to the buyer, telling them that add-ons are available. The buyer then decides whether he/she is interested or not. You can change the default text that is displayed (click on the Help link next to this field to see the default).
  - Note that add-ons are available only for USA or Canada destinations, so the introductory text should indicate as such.
  - Note also that any add-ons purchased, will show up as a separate credit card transaction in the buyer's statement (separate from the gift card purchase), so the introductory text should indicate as such as well.

Inventory

So how do we get products added to the system, so that they can be available to be sold after a gift card is bought/topped up ? Your business members are given the full responsibility of providing the product details that they want to offer, but you as the administrator have full control of which products you're going to allow to show up to buyers.

Product submission: The first step in this process involves your locations submitting their products for review. They provide the name of their product, a description for that product, and they also upload a picture of what their product looks like. In addition, the locations specify the pre-tax price of that product, the taxes that need to be applied, and also specify whether they can ship to Canada or the USA and what the shipping charge is for either.

Product review: Once the location has submitted a product, you as the administrator will get an e-mail indicating that there's a product that needs to be reviewed. Access the Add-Ons/Products section of the dashboard, and there, you will be given the opportunity to review all of the details submitted, and to either "Accept" or "Reject" the submission. If you Reject the submission, you will need to provide a reason. Either way, once you take action on a submission, the location that submitted the product will be sent an e-mail indicating the status.

Note: A ready-made widget has been developed that you can place in a special "members" area of your web site, that your member businesses can click on in order to get to the screen that allows them to upload their product information (see the Getting Started guide for details on this widget, or access the Widgets section of the dashboard). Another option is that when locations access the LocationCentral screen, a button entitled "Manage Add-Ons" will be displayed, and clicking on this button will also take them to the same screen as above.

Step-by-Step Process

Once you've saved your settings, and there is an Inventory of products in the system, the system determines when to show the "add-ons" option to the gift card buyer.

- Step 1: Determine when to display the add-ons message based on settings.

- Step 2: Buyer clicks on appropriate link (either "Yes, I'm Interested" or "No Thanks")...if buyer clicks on "No Thanks", there are no further steps in the process … it stops.

- Step 3: Buyer makes selections – The list of add-on products are displayed … the order is chosen at random, and for each product, the following information is displayed: the product Name, the uploaded picture, the Business Name offering the product, the Price (pre-tax plus taxes), as well as whether the product can be shipped to the USA or Canada (and the shipping charge for each). For each product, the user can choose to include that product in their "cart" (by putting a check-mark in the checkbox). A running tally is shown at the bottom (the "cart totals"). Once the buyer has completed his/her selections, he/she clicks on the "Continue" button.

- Step 4: Buyer provides ship-to address. In this step, the buyer specifies where the product(s) should be shipped, including any potential special instructions ("deliver at the back door", for example). When they've completed this step, the buyer clicks on the "Checkout" button.

- Step 5: System processes transaction. The same credit card number/expiry/CVV that was used to buy the gift card, is used to pay for the add-on products. For each product, the buyer pays the total of: pre-tax price, plus taxes, plus applicable shipping charges. All of the product purchases are consolidated into **one** credit card transaction. This transaction goes through your gateway provider, which results in credits to your bank account. The system debits your Account Balance by 1 % of the pre-tax price (not including any taxes or shipping charges), and if shipment tracking was enabled, your Account Balance is debited by an additional $0.05 per add-on product purchased.

- Step 6: Businesses get notification e-mails: Once the credit card transaction goes through, each of the businesses that "sold" a product, will receive an e-mail with full ship-to address information (including special instructions), the list of their product(s) that were purchased, and the prices that were quoted to the buyer. Note that there will **not** be any credit card information in that e-mail. That e-mail will contain unique order numbers for each product, and will also contain a link (to the "LocationAddOns" screen), which the business can click on when they have shipped the product.

- Step 7: Businesses flag the products as shipped: after clicking on the links above, Locations can flag products as shipped by putting a check-mark in the "I have shipped this product" checkbox and clicking on the Save button (when they do, the recipient will also get an e-mail telling them that those products have shipped). Note that if Shipment Tracking was enabled when the product was purchased, Locations can also specify the tracking number and carrier that they used to ship the products, and if they do, the system will start "tracking" the delivery of those products.

- Step 8: Shipment tracking (optional): if shipment tracking was enabled, and the Location has provided a tracking number/carrier, the system will get real-time updates regarding delivery of the products. As soon as those shipments receive a "delivered" status, an e-mail will be sent to the Location telling them as such, and the system will also send an e-mail to the Recipient telling them as such. NOTE that if the system receives a "failed" message of some kind (such as "Return to Sender"), the Location will get an e-mail telling them as such … it is then up to the Location to work with their carrier and/or contact the recipient to work through shipment issues (incorrect address was provided, as an example).

- Step 9: Disbursement: as part of the normal disbursement cycle/process, the system will determine if add-on purchases should be included (see the Settings section above, under the "Disbursement Option" field). The disbursement to the location will be the pre-tax price, plus taxes, plus shipping charge, minus any hold-back that you have specified (see the Settings section above, under the "Hold-Back Type" field).