Getting Started

Introduction

Welcome to Community Gift Cards ! By now, you've read up on the business case of gift cards (win-win-win for you, your member businesses, and visitors to your special place in the world), and you're ready to jump in and start reaping the benefits. We've created the Community Gift Cards platform to be an easy and intuitive system, and you will find some useful documentation and popup screens throughout the dashboard, but this document is intended to provide you with a step-by-step guide to getting started.

There is a lot of good information and a fair amount of detail in this document, and we know that you will find it useful, so let's jump right in !

Note that even though this document is set up in a step-by-step fashion, there are likely some instances where you can “skip ahead” and perform other steps while you're waiting for other items to complete (example: you're waiting on your member businesses to submit their direct deposit forms).

Step 1: General Settings

The first thing you should do is to make sure your general settings are accurate and reflect the way you do business.

Go to the "**Settings**" section of your dashboard. There, you will find a number of general settings that you should pay attention to and may need to modify from the default settings that were put into the system when your account was first created. In particular:

*E-mail: The e-mail address you specify here, will be used by the system when sending you communications. See the E-Mail Notifications document (in the "**Help**" section of the dashboard) for a description of the types of e-mails that are sent out, what actions trigger those communications, and who the recipients are.*

Theme: Community Gift Cards is built on the "jQuery UI" (User Interface) standard themes. Themes are used to present web pages in predefined color palettes that are pleasing to the eye. While the dashboard and administrative functions are always presented in the "Sunny" theme, this setting allows you to specify what theme is used for pages that are accessed by your member businesses (redemption screens, etc.), as well as your customers (check gift card balance, etc.). To see what the standard themes are, please visit the following link => https://jqueryui.com/themeroller. On the left hand side, click on Gallery. Alternatively, you can just change the theme on the Settings screen, and open up one of the externally-facing pages to see the impact of the change.

Look-What-I-Bought: Specify "Yes" here if, when cards are redeemed and an e-mail is sent to the card holder notifying them of their redemption, you want to include some special text in that e-mail. This will give the gift card holder the opportunity to upload a picture of what they bought, and to tell a story that goes with it (they will have 14 days to do so). When they submit their story, you will receive an e-mail, and you log in to the Dashboard, where you can approve (or reject) a story. Approved stories show in the Look-What-I-Bought widget (see the widgets section in Step 9 below), which can be shown on your web site.

On Hold Instructions: Click on the "Help" link right next to this field, and a popup window appears explaining how it is used. In essence, whenever a gift card is redeemed at a place of business, an e-mail is sent back to the customer telling them that a redemption has occurred. At the bottom of that e-mail, you will want to let the customer know who to contact in case they believe the card is being used fraudulently (you will see later how those cases should rarely, if ever, occur).

Sign Up Text: There is a streamlined process that allows you to send an e-mail to all of your locations / merchants, that has a sign up link in it. This is the text that will appear in that e-mail. When your merchants sign up using this method, this reduces the workload on you, since they will automatically activate one device, will get the direct deposit form, will be asked to update their map coordinates, and will also be asked to fill in their bank information.

POS Payment Type Name: Some of your businesses may use POS (Point-of-Sale) systems, and the Community Gift Cards platform was built to work with a number of those systems. One of the basic ways that it does, is by identifying a special "payment type", and this is where you specify what that payment type should be – this should be relatively short, such as "Chamber Gift Card" or something similar. For example, a server at a restaurant may have been provided a gift card, and they simply want to identify that the payment was made with a gift card. They would select the special "Chamber Gift Card" payment type in their POS system, and this will allow the POS system to tell the Community Gift Cards platform that a card redemption has occurred at their place of business.

Home Location: place the marker where you are located on the map. This will make it easier later when you need to map out your different businesses/locations, as by default, the map will be zoomed to this default home location. When you first go to this screen, the location will reflect the location of the capital city in your state/province.

*Gift Card Values: when customers buy a gift card, they are provided the option of selecting an amount to buy. This field is where you specify which values should be made available for selection (by placing "check-marks" next to the values you want to include). If you do not specify any values (no check-marks next to any value), then **all** of the values that are found in this field are available for selection.*

**Note*: Remember to click on the Save button at the bottom of this screen in order for your changes to take effect.*

Step 2: Set up Member Businesses (aka “Locations”)

For this section, you will access the “**Locations**” part of the dashboard.

Tags/Categories: The first thing you should do is identify the type of locations you have (examples: “Bed and Breakfast”, “Wine Tours”, “Restaurant”, “Specialty Shops”, “Clothing Stores”, etc.). You do this by clicking on the Location Tags/Categories button at the top of the screen, and create the appropriate tags on the popup screen. Note that any location can be “tagged” with multiple categories. As an example, you may have a business in your network that is a winery, but also has an attached restaurant – in this instance, the location would have both “Restaurant” and “Winery” tags associated with it. Tags are used in a few different ways, most importantly by the Marketplace functionality, where customers can view what businesses are in your network and where they are located. Tags are also used by you in filtering various reports in the dashboard and other functionality.

- Note that if you plan to use the file upload functionality to create your locations (see below), you may be able to skip this step if your businesses are associated with a single tag/category.
- You can choose to make the tag “invisible” to the Marketplace functionality – when you do so, you can still use the tag for your own internal purposes, but card holders visiting the marketplace will not see that category. If a location has both an “invisible” tag, and a normal tag, that location will show in the marketplace in that other category.

Geographies: If your business represents multiple localities/towns/cities, you have the capability of identifying “geographies” in the system that relate to those. When you click on the “Geographies” button, a pop-up window appears that allows you to change the “title” (as it appears in the MarketPlace – default is “Geography”), such as “Trail”, “City”, “Town”, etc. Also, you can create as many of these geographies as you need, order them in the way that you want (for selection by the gift card holder when viewing the MarketPlace), and you assign your locations to those geographies. Note that in order to enable geography selection in the MarketPlace, go to the MarketPlace screen, and specify “Yes” to the question “Allow Geography Selection ?”.

Creating your Locations: you have 3 different options for creating locations in the system.

- Option 1: Create your locations one-by-one. Simply click on the “Create Location” button at the top of the screen, and proceed to fill in the details on the pop-up screen. There are certain fields that are required, and the system will prompt you if you do not specify them. This is a good time to identify which tags/categories that this location is associated with.
- Option 2: Upload a file. If you already have a file that contains all your member businesses, such as a spreadsheet, you can use this option to upload your locations all at once. Clicking on the “Upload Locations File” button at the top of the screen, will show you a pop-up screen that will allow you to select your file, and will provide you with expectations of the file format. Once you click on the “Go Upload” button on the pop-up screen, the system will try to upload your file and create the locations for you. The system will also show you the results, indicating if any errors were encountered (and what types of errors). **Note** that new “tags” may also be created, depending on the contents of your file (a single tag is allowed per new location). The system will “skip” any lines where the location name is already present, so you can safely upload your file multiple times. Note that the system will **not** update any existing records – this functionality is for creating new locations only.   **Hint**: if you plan to send out a “Location Sign-Up” email (see later), you will want to include an “Is Active” column in your file and set the value to “False” for all locations.
- Option 3: Use an API. This functionality is a little more complex, but it allows for an external system (such as the system you're already using to keep track of member businesses) to communicate directly with the Community Gift Cards platform, and that system could issue commands (via API calls) to create and/or update locations as needed. See the “API Specifications” document in the “**Help**” section of the dashboard).

Send Location Sign-Up Emails: A very streamlined approach has been developed, whereby you send out an “invitation” to all the locations in your network to join the the Community Gift Cards program. Whenever there are “inactive” locations, that currently have no devices activated, they are candidates for being included in the “sign-up” process. In essence, when a merchant/location clicks on the link at the bottom of the e-mail to sign up for the program, they will automatically activate the device that they used to click on the link, they will automatically be sent an e-mail with direct deposit instructions (you should skip ahead and complete your Direct Deposit form first in step 3), they will be asked to update their coordinates on the map, and they will also be asked (optionally) to provide their bank account information, all on the same screen. In addition, after they've completed their sign-up, they will be given the opportunity to send themselves a device activation e-mail so that they can activate more devices. If any such locations exist (inactive, with no devices), and you've specified some sign up text in Step 1 above, a button labeled “Send Sign-Up E-mails” appears at the top of the screen.

Send Device Activation Emails: The vast majority of card redemptions occur when a card holder is at a place of business (Charities are a special case – read up on charities in the "**Charities**" section of the dashboard). In order to ensure that cards are used/redeemed only at the places of business in your "network" of locations, each location must "activate" the devices that they will use to interact with the Community Gift Cards platform. A "device" can be a front-desk terminal, a tablet used by the manager, a cell phone that staff can use to "ring in" purchases – basically any internet-connected device. In order to "connect" their devices to the platform, a special "device activation" e-mail is sent to the email address associated with the location. The e-mail is only active for a specific amount of time (as of this writing, 3 hours), and workers at the place of business only have that amount of time to use their devices to access the special link that is included in that e-mail. When they do so, they will open up a web page on the platform, and as soon as they do, the device they used to open the web page will be "connected" to the platform.

- Until such time as a location has active devices, they will not be able to accept gift cards issued for your account.
- When there are locations that need to have an activation e-mail sent (no devices activated for those locations yet), a button appears at the top of the screen entitled "Send Device Activation E-mails". Click on this button, and a pop-up screen appears letting you know which locations will be included – by default, all locations are selected – you can change this if you want to. Clicking on the "Send E-mails" button on the pop-up screen will start sending e-mails. The system sends 5 at a time, and provides you with a running total of how many are left.
- **Note**: Only devices that have "cookies" enabled will be able to register/activate.

Step 3: Customize the System and send Direct Deposit instructions

In step 1, you saved your General settings. In this step, we'll look to personalize the system a little bit more to your account. Access the "**Documents/Logo**" section of the dashboard.

You will notice 2 sections here … a logo section, and a documents ("Location Forms") section.

Logo: Community Gift Cards has a standard logo that is pleasing to the eye. The logo appears on e-mails that are sent to various parties (see the "E-Mail Notifications" document in the "**Help**" section of the dashboard), and also appears on the various externally visible pages (marketplace, etc.). However, if you do want to create your own logo, this is where you do it.

> Take the logo that is already in the system (in the "System Logo" section, right-click on the logo image and save it to your computer), make the edits that you want to make, then click on the "Upload new Logo File" button once you've selected the file you created.
>
> **Note**: Uploading your logo in this way, does **not automatically** mean that the system will be updated to use it. When you upload your logo, we get an e-mail. We need to make sure that all logos do not stray too far from our branding. As such, please ensure that your logo still has an adequate Community Gift Cards attribution. Logos are a reflection of our platform, so we must "approve" any logo submission. We will work with you to ensure that your needs as well as ours are met in this regard.

Location Forms: In order to "pay" your business members for any card redemptions that have occurred, you will want a direct deposit form filled out by each business in your network, along with evidence of a voided blank check. We have created a template direct deposit form, which you can use to customize for your needs.

> Take the template direct deposit form that is already in the system (click on the paperclip next to "Template Direct Deposit Form"), and save it to your computer. It is a ".doc" file (Microsoft Word). Edit it as you see fit, and when you've made the changes you need to make, save it as a PDF. Saving it in PDF format, allows others to print this form, from any computer that they will be using (not everybody has MS-Word). After you've created the PDF form, upload it to the system by clicking on the "Upload New Form" button and selecting the PDF file.
>
> You are now ready to send the direct deposit form to your member businesses/locations. The bottom of the screen shows you which locations in your network you can send the form to. Locations must have at least one device that is a "privileged" device – one that the business can use to fill in the form and submit it. By default, when businesses receive their device activation e-mails, the first device that registers/activates, will get those privileges (you can change that by going to the "**Locations**" part of the dashboard, and clicking on the "Show" button to show the devices for the location). Select the location(s) that you want to send the form to, and click on the "Send Direct Deposit Instructions" button.
>
> An e-mail will be sent to the address on file for the Location. The e-mail will have the PDF file as an attachment, and instructions will be included notifying the location to print the PDF and fill it in, then scanning the printed and filled-in form into their computer as an IMAGE file. Instructions will also be provided to do the same with a void check – scan the void check into their computer as an IMAGE file. Once they have done both, they can click on the link included in the email, where they can upload both image files. Once both files have been uploaded, you can see them as the account administrator. Both image files will remain in the platform so that you can reference them in the future.

Step 4: Fill in banking information for your Locations

Now that each member business has uploaded 2 documents (image files of their direct deposit form and of a void check), it's time to set up the system so that you can pay those locations when card redemptions occur.

On the "**Documents/Logo**" section of the dashboard, those locations that have uploaded these images, will have a paperclip icon under the "Direct Deposit Form" and "Cheque Image" columns. Pay particular attention to those locations where the "Bank Information in System ?" column is set to "NO". This means that they've uploaded their information, but you have not yet keyed their bank account information into the system.

- The system is **not** able to automatically "scan" the location's cheque or its direct deposit form to determine what bank account information was provided – this is a necessary manual step that you need to do.
- Read through Optional Step 11 – Bank Verification if you want to be sure that you've entered the bank account information correctly.
- To make the next part easier, it might behoove you to print both documents – click on the paperclip icons, which will open a new window in your browser, that you can then print.

Now, go to the "**Locations**" section of the dashboard. Next to the location that you are addressing, click on the pencil in the "Edit" column. This brings up the location edit popup window … this is where you can enter their bank account information. There are helpful links on that screen, along with sample check images and what information needs to be stored in which field.

- If you're in Canada, information specific to Institution Numbers are available by clicking on the link. The resulting popup shows you all institution numbers across Canada.
- If you're in the USA, there is a link beside the "Routing Number" field that allows you to double-check that the routing number you entered is valid – the popup will show you basic information about the bank in question.
- This may also be a good time to identify the location's coordinates on the map (Latitude/Longitude) if you haven't already done so in step 1. Zoom out or in as needed, and "grab" the pushpin and move it to where it needs to go. Map locations are important when the marketplace functionality is used, showing card holders where all of your member businesses are located.
- For now, just leave the "Integration Method" field as "None" … we'll get to that later.
- Remember to click on the "Save" button at the bottom of the popup window in order to save your changes.

Step 5: Submit your Applications for Gateway and Funds Transfers

The Gateway functionality is how you get paid, by people buying gift cards (or topping up their existing gift cards).

The Funds Transfer functionality is how you pay your member businesses for gift cards that were used at their places of business.

Until such time as you have established connectivity for **both**, you will remain in **TRIAL** status. During TRIAL status, you will not actually get paid even if you were able to install a widget on your web site (more on that later).

For Gateway and Funds transfer functionality, we have partnered with Bambora for those of you located in Canada, and with Forte for those of you located in the USA. Simply follow the link below and submit your application:

- If you're located in Canada, go here →
    - https://boarding.na.bambora.com/?id=48d47b51-8555-46fb-a3b2-4dad9d5e01ae
- If you're located in the USA, go here →
    - https://console.forte.net/app?token=m1uOKjIGEkC9QuJqFlsedA

Note that this step may take a few days after Bambora/Forte receive your submitted applications.

Step 6: Set up your payment schedules

While you're waiting for the applications to be processed, you can set up the system so that it will take care of the payments to your locations for you, as automatic as you want it to be !

Go to the "**Finance**" section of the dashboard.

For now, ignore the "Batch Reporting" button.

Hold-Back methods: When the system submits batches of direct deposits, it will consolidate them as much as possible according to your disbursement schedules (so that you are paying as little as possible for your "per transaction" fees). For instance, if a given restaurant had quite a few people use gift cards in the past week, and payments to that restaurant occur on a weekly basis, the system will create one direct deposit transaction. For each transaction, you can opt to "hold back" an amount (or none at all). You may decide that for certain businesses, you will want to "hold back" a percentage of the transaction amount, or perhaps a flat fee for every transaction … it's up to you ! You can create as many hold-back methods as you want … by default, new Locations are not assigned to any hold-back method.

- Once you create a hold-back method, the pop-up screen allows you to assign the hold-back methods to the locations in your network, as you see fit. The "tags" are shown beside each location, allowing you to more easily determine which locations should be assigned. Selecting the "None" hold-back method and assigning it to the locations you select, simply removes any hold-back for those locations.

Disbursement Schedules: As mentioned above, the system will create batches based on your disbursement schedules. A "disbursement" in the system, is a payment that you make to your Location (member business), based on gift cards used at their place of business. There are two main components to every disbursement schedule:

- Scheduling: Daily, Weekly, Bi-Weekly (every 2 weeks), and Monthly.
  - *Daily: you specify whether the disbursement should occur "next day" (the day after the card was used at the place of business), two days after that card was used, three days after, …, up to 7 days after*
  - *Weekly or Bi-Weekly: you specify the day of the week (Monday through Saturday – excluding Sundays) that the disbursement should occur (after, and nearest to when the card was used)*
  - *Monthly: you specify the day of the month (1 through 20) that you want the disbursement to occur*
- Manual Reconciliaton: this will be either "Yes" or "No". If you specify "Yes", it means that any disbursements will first need to be "triggered" by yourself to be included in the next cycle. For example, if you know that a given business (or set of businesses) are particularly "high-end", and you expect that gift card holders will normally redeem fairly large amounts, you may want to make sure that you first have enough funds in your bank account to cover those disbursements before they go through. The "Finance" section of the dashboard shows a sub-section entitled "Disbursements to be Reconciled", and buttons are shown beside every disbursement that you can either "Accept" or "Reject". Once you Accept, that transaction will be included in the next applicable disbursement cycle.

Once you've set up a disbursement schedule, the pop-up screen allows you to assign the disbursement schedules to the locations in your network, as you see fit. The "tags" are shown beside each location, allowing you to more easily determine which locations should be assigned. Selecting the "None" disbursement schedule and assigning it to the locations you select, simply removes the schedule altogether for those locations.

Gateway Settings: When you click on this button, a popup screen is shown. On that screen, there are 2 columns shown – one is for the Gateway, the other is for the Funds Transfer – it shows you the connectivity status of each...don't worry about this until we've gone through the application process. However, one of the fields you may want to update, is the "Minimum Amount" field under the "Funds Transfer" column. Recall that for funds transfer, you are normally paying a "per transaction" fee.

- Let's assume your per-transaction fee is 25 cents. What if the disbursement were only ten cents ? It would not make sense to submit a funds transfer transaction, when you are paying more for it than the actual amount. You may want to update this field to at least reflect what your per transaction fee is. On the other hand, some of your business members may need to wait longer to get any disbursements, if their typical gift card volume is low and reflects relatively low-amount redemptions.

Bank Verification: Skip this for now. Refer to Optional Step 11 – Bank Verification for details.

Step 7: Set up the Marketplace

When you're first starting out, you will not have any member businesses set up (again, called Locations in the system), and as such, the Marketplace by default is not enabled.

Go to the "**Marketplace**" section of the dashboard.

The Marketplace is a page that is available to advertise all the locations that are in your network. Once enabled, customers can access the page and see information about all of your businesses, by "category" or "tag" - this allows, for example, your customer to see all "Bed and Breakfast" accommodations in your network. This screen displays at a minimum, the business name, and their location on the map. Customers can choose to focus the map on just a single category, or can display all categories on the map all at once. Optionally, you can choose to display some additional information about each business, such as:

- their Logo (you specify what size all of the logos are going to be in the marketplace – note that in order to not overly "feature" one location versus another, all logos are displayed with the same dimensions)
- a description of their business (you should get your business members to provide you some text to include here, but this is not something they can alter – again, you are in full control so that individual locations are not overly featured or highlighted). No HTML tags will be allowed, only text.
- a link to their web site
- their full address details (no HTML tags will be allowed, only text)
- the discount percentage that the location offers customers when they use their gift cards (up to 95 %). You specify whether the discount applies to "All items", "Selected items only" or "Other" - if you select Other, you need to specify the type (example: 10 % off "first night's stay"). The discount information is displayed not only in the marketplace, but also on the screen when customers are at a place of business (as a reminder to the staff at that location that discounts could apply). A preview is provided in the popup window, indicating what your selections will look like. NOTE that the system does **not** automatically apply discounts to the items actually selected during the card redemption process – this is especially important when the integration method is "Stored Items" (more on that later) - this means that the prices for the stored items should already reflect the discounted price. (NOTE: a Location can either provide discounts, or can provide rewards, not both – read the Rewards System documentation for further details).

Once you enable the Marketplace, it can be made visible in a couple of different ways:

- on the screen where customers check their gift card balance, a button will be made available entitled "Where can I use this Gift Card ?" … clicking on that button shows a new screen with the marketplace
- through the use of Widgets (more on that later), you can make it available from your own web site

Please note: the "**Charities**" section of the dashboard allows you to specify the logo size that is displayed on the dedicated "Charities" page, and allows you to upload logos for the charitable businesses that are included in the list. There is only one logo for every Location in the system, so if you upload a logo for a location on this screen, or on the Charities screen, they are one and the same and will update each other. However, the logo size that you want displayed in the Marketplace, is different than the logo size that is displayed on the charity screen. Therefore, if you choose different logo sizes between the two, the logos of charitable organizations may be "skewed" in one place or the other.

Another feature of the Marketplace, is the concept of "special trips". This is where you can make suggestions to the card holder, of itineraries that they could take in their travels, to take advantage of their gift card. Example: start with a visit to an antique store, go to a winery, visit the museum, and finish at a restaurant.

- You specify the overall Label that gets displayed in the Marketplace (examples – Day Trips, Hiking Trails, etc., the default is "Special Trips") - remember to hit the Save button next to this field after you've made your change.
- For each special trip that you add, you specify:
    - Name of the trip
    - Full description – this is where you can be creative in describing what the card holder will see and do if they follow the itinerary in this trip (no HTML tags allowed)
    - Locations / businesses in your network along the way (should be at least two) – use the "Move Up" and "Move Down" buttons beside the locations to move them up and down after you've added them, to change the change the order in which they will be displayed (numbered "markers" on the map).

Step 8: Set up the Integration Methods

Each of your member businesses has its own way of doing business. The Community Gift Cards platform was built with flexibility in mind. There are a few different options for the Integration method, and below is an explanation of each method:

- No Integration – Notification only: using this option, the platform can be configured to simply send the location an e-mail after the staff have specified the amount to redeem against the card that the holder has presented.
- Stored Items: a location has the option of storing a copy of their “items for sale” in the platform itself. When they do so, the Community Gift Cards system will automatically know the price per item, and can provide the staff with selections of items, and updating the gift card balance as they select items. In this instance, the notification e-mail back to the location, will include the list of items selected, the quantity of each, the price of the item, and the amount redeemed from the card.
- Point-of-Sale (POS) systems: a number of businesses already have POS systems in place. CommunityGiftCards can interface with a number of POS systems … using this method, the platform can “pull” available items from the POS system, and after the selections are made, can also “push” updates to the POS system so that the inventory can be updated, payments via gift cards are captured, etc.
- Webhooks: If the location is part of a group of locations that has its own system, the platform can “pull” items through the use of a Webhook, then “push” information back through the Webhook. See the “Webhooks” document in the “**Help**” section of the dashboard for a more complete description.

It should be noted that on day 1, there may be no need to set up any integration methods at all. This is the default “None” integration method that is set up with any new location created in the system. Locations can simply enter an amount on the redemption screen (remember, that's from an already registered and activated device), and transactions will flow through the system properly.

Step 9: Set up your web site with widgets

For this step, access the "**Widgets/Referrals**" section of the dashboard.

There are a number of widgets that come pre-packaged for you. For each of the widgets, you specify what you want it to look like, by identifying whether the logo should show or not, and whether you have some "caption" text that you want to show or not.

- When you want to show a logo, you select what percentage of its original width/height that you want to display.
- When you want to show some caption text, you specify the text itself, the font size, the color of the letters, and any special styling (italics or bold).
- For each widget, a "preview" is shown on the right of what the widget will look like once you save your settings. For each widget, the top part shows you the sample source code that you can use to place the widget on your web site.

Buy-A-Gift-Card Widget: This widget is what you want to show people on your web site, to buy a gift card. In essence, the underlying page that will be displayed when the widget content is clicked, is:

- https://www.communitygiftcards.com/secure/buyagiftcard.php

Marketplace Widget: This is the widget you use to tell people where they can use the gift card. In essence, the underlying page that will be displayed when the widget content is clicked, is:

- https://www.communitygiftcards.com/secure/marketplace.php

Check-My-Balance Widget: This widget allows people to check their current gift card balance. In essence, the underlying page that will be displayed when the widget content is clicked, is:

- https://www.communitygiftcards.com/secure/giftcardcentral.php

Enter-Our-Contest Widget: You have the capability to fund a gift card yourself, and to have people enter a contest to win that gift card. This widget allows you to place on your web site, a way for the public to access that contest and submit an entry. NOTE: You have the capability of displaying multiple instances of this widget on one web page … see the "Widgets" section of the Dashboard for further instructions. The underlying page that will be displayed when the widget content is clicked, is the following:

- https://www.communitygiftcards.com/secure/giftcardcontest.php

Show-Contest-Entries Widget: When the public enters your contest(s), they submit whatever information you have required of them (at minimum, their name and e-mail address). If you have specified that they also need to submit a story/comments and/or a picture in order to be eligible for that contest, you can use this widget to display those stories and pictures on your web site. This widget will display up to 100 entries. Note that no personal information of those that entered the contest will be shown, unless the submitted comments themselves specifically contain text that is uniquely attributable to the submitter. Note that you have the capability of displaying multiple instances of this widget on one web page … see the "Widgets" section of the Dashboard for further instructions. You specify just a few settings for this widget:

- Display Mode (Logo/Contest Name, or Contest Entries) – default = "Logo/Contest Name"
  - Logo/Contest Name: With this setting, you have the same typical settings as other widgets (logo size, etc.), and the viewer simply needs to click on the logo/text to get a **new** window opened which contains all of the contest entries details, using the other settings below.
  - Contest Entries: With this setting, the contest entries details are displayed inline directly on your web site, using the other settings below.
- Width and Height: only applicable if Display Mode is "Contest Entries" (since the width and height will be determined by the new page functionality in the other instance). The width and height of the widget on your web site (if there are more stories and/or pictures than can fit within those parameters, the widget will take care of adding scroll bars as appropriate).
- Contest Entries Settings:
  - Entry Status (default="All"): by default, the widget will display all stories that you have not specifically flagged as "not eligible" (including un-flagged entries)… you can change this so that the widget only displays entries specifically flagged as "eligible" (setting = "Eligible Only") (note that the winning entry counts as "eligible" here)
  - Include picture (yes/no), and Include comments (yes/no) … at least one must be set to "yes". If both are set to "yes", the picture will be shown above the comments.

- ◦ Display Order: either “Random” or “Latest first” (default is “Latest first”)
- ◦ Winner only ? (yes/no): if the contest has a winner declared, you can specify that you only want to display the winning entry (if set to “yes”) or not (default is “no”)
- ◦ Winner at top ? (yes/no) – default = “no”: if the contest has a winner declared, and you are not displaying only the winner (see above), you have the option of always displaying that winning entry at the top of the list (if set to “yes”) or not. Note that if you have this set as “no”, the winning entry may or may not be displayed at all, as the winning entry will simply be included as another prospective entry to display in the display order.

Make-A-Donation Widget: This widget allows people to make a donation to a charity if you have charities in the system. Note that in order for the widget to display, the person must be accessing the page on which the widget is referenced, with a specific card code. The underlying page that will be displayed when the widget content is clicked, is the following:

- https://www.communitygiftcards.com/secure/charitycentral.php

Activity-Stream Widget: This widget displays a stream of activity in the platform. As an example “5 mins ago: Gift Card used at ABC Company” … this widget auto-updates itself every 10 seconds. You control how far back to look for activity, what information to display (location name or not, etc.) … if there was no activity, the widget will simply not display anything.

Look-What-I-Bought Widget: This widget allows you to display stories of how people have used their gift cards, directly on your web site. This widget updates itself every 60 seconds, and will display up to a maximum of 100 stories (the latest submitted stories first) … you only have to specify 2 settings. The “width” and “height” of the widget on your web site (if there are more stories than can fit within those parameters, the widget will take care of adding scroll bars as appropriate). Card holder stories are cleared from the system every 365 days. Stories are gathered by gift card holders clicking on a special link included in the e-mail that is sent to them when they redeem their gift card. They specify their name (or specify that they want to remain anonymous), upload a picture of what they bought with their card, a caption (optional) for the picture, and some comments that tells their story.   Read the “Social Media” help documentation to get even more details.

Join-Our-Program Widget: This widget is usually presented on a web site page that is dedicated to business community members (ie. Locations), and it allows a business to request to be added to your Community Gift Cards account. When the user clicks on the widget, they are taken to a page where they enter their Business Name, their E-Mail Address, and they select which category(ies) of business they are (“Tags”) … they have the option of entering their own category as well if they don't fall into one of your existing categories. They are also provided a visual map, where they can “drag” the marker over their location. The result is an e-mail to you … you simply need to log in to the Community Gift Card dashboard, and any “pending” locations are shown on the dashboard. You click on the pencil to edit the request, and either REJECT the request, or make your updates to the categories that they wanted to use first then ACCEPT the request. The underlying page that will be displayed when the widget content is clicked, is:

- https://www.communitygiftcards.com/secure/locationjoin.php

Pitch-In Widget: Similar to the above, this widget is usually presented on a web site page that is dedicated to business community members (ie. Locations), and it allows a business to “pitch in” on a card that you are sponsoring for a worthy organization in the community. Read up on the “Social” section of the Dashboard to get a full description of the pitch-in campaigns and what you have available to you. The main benefit is that your membership as a collective whole can help a local business raffle off a gift card, without being “out of pocket” (similar to how Rewards work, your member businesses will simply have disbursements deducted – that is, they will simply get lesser amounts deposited into their accounts when gift cards are used at their place of business). The underlying page that will be displayed when the widget content is clicked, is:

- https://www.communitygiftcards.com/secure/pitchin.php

Add-Ons Widget: Similar to the above, this widget is usually presented on a web site page that is dedicated to business community members (ie. Locations), and it allows a business to submit their “add-on” products that can be purchased at the time that gift cards are purchased/topped-up (see separate help documentation on add-ons). The underlying page that will be displayed when the widget content is clicked, is:

- https://www.communitygiftcards.com/secure/locationaddons.php

Step 10: Go LIVE !

For this step, access the "**Go LIVE**" section of the dashboard.

Assuming Bambora and/or Forte have processed your application form(s), and have gotten back to you with information about your account (how to log in, etc.), you are now ready to go live with Community Gift Cards.

When you enter this screen, there will be two sections … Gateway, and Funds Transfer.

For each section, you'll be asked to provide very basic information, such as the Merchant ID that you were provided by Bambora, or the Organization Id and Location Id provided by Forte.

Once you enter this information, the system will ensure that it can connect with the information that you provided, and once the connectivity is confirmed for both, you will then be LIVE !

What does this mean ? It means that you are no longer in TRIAL status, and gift cards that are bought will truly end up with funds arriving into your bank account. It also means that any disbursements you've set up in the system, will actually result in funds transfers from your account to your business members bank accounts.

We truly hope that you have found this document useful … we know that it doesn't cover everything that the system is capable of, but we have hopefully given you enough information to get going !

Optional Step 11: Bank Verification

For this step, access the "**Finance**" section of the dashboard. Specifically, click on the **Bank Verification** button.

If you are unsure that you've properly filled in the bank account information for your locations, you can use the Bank Verification process to ensure that when disbursements do occur, they will end up in the correct bank account.

An additional benefit to this process, is that there will be confirmation that the bank account that was provided to you, is actually owned by the merchant that has submitted their Direct Deposit form and/or void check.

There are 4 steps in this overall process:

- You submit an EFT / ACH transaction, with an amount between $0.26 and $0.99 (random), to the bank account on record. **Note** that you **will** be paying a transaction fee for every transaction that is submitted.
- The funds transfer vendor (Bambora / Forte) processes this transaction as per the normal schedule that you have with them.
- The system sends an e-mail to your merchant/location, asking them to confirm the amount that was deposited – they click on the link (must be done from an activated/registered device) that is at the bottom of the e-mail. In order to do this, your merchant needs to review beforehand their bank statement to determine the amount that was deposited.
- When the merchant clicks on the link, they are brought to LocationCentral, where they are asked to provide the amount that was deposited. If the amount they enter matches the actual amount, then the bank account information is verified.

Note: Once a location/merchant has been "selected" to go through this process, you will **not** be able to change their bank account information. That is, if a location is in one of the following status'es (see below), you will not be able to change the bank account information => In process, Waiting on Confirmation, and Complete.

After you click on the button, a pop-up screen is shown. The pop-up screen provides you with the list of locations, along with their current overall status (in separate "tabs"), which will be one of "Missing Bank Info", "Not started", "In process", "Waiting on Confirmation", "Complete", and "Error".

- *Missing Bank Info*: there is no action that you can perform other than to input the bank account information for the location (see Step 4)

- *Not started*. You have not yet initiated an EFT/ACH funds transfer for this location. You have 2 options when a location is in this stage:
  - Click the "Mark as Verified" button (because you know the bank account information is correct, and you don't need to actually submit a transaction) … this will change the status to "Complete"
  - Select the location (by putting a check-mark next to it), which means that it will be included in the next transaction set that is sent, when you click on the higher-level "Send Test Transactions" button

- *In process*: You have already sent a test transaction for this location, and the system is awaiting the results. The date/time that the transaction was sent will be shown, as well as the internal batch number. A regularly scheduled job is run by the system to check the status of the submission. This job will update the status according to:
  - If the transaction was successful – the status will be updated to "Waiting on Confirmation" - the job will also automatically send an e-mail to the Location asking them to confirm the deposit
  - If the transaction was NOT successful – the status will be updated to "Error"
  - If the transaction has not yet completed – no change to the status.

- *Waiting on Confirmation*: the transaction successfully completed, but we now need the Location to confirm the amount that was deposited. (the date/time that the e-mail was sent to the Location will be shown next to the location, as will the deposit amount). You will be given the option to click a button entitled "Mark as Confirmed"; this is handy in cases where the location in question may have mistakenly deleted the e-mail and has called you directly to confirm it for them – you should not do so unless they have provided you with the deposit amount)

- *Complete*: the transaction was successfully completed, **and** the Location has confirmed the deposit amount (or you have on their behalf). (the date/time that the e-mail was sent to the Location if there is any, as well as the date/time that the Location confirmed the amount if there is any, will both be shown)

- *Error*: there was a problem with the bank account information that you had entered, as the transaction was not successful – you should double-check the information that you entered in Step 4. You will have the option here to "select" the Location (by putting a check-mark next to it), so that it is included in the next transaction set that is sent, when you click on the higher-level "Send Test Transactions" button, but only if the bank account information currently on file, is different than what was submitted last time. Note that only the latest test transaction information is reported on in this pop-up screen, but you can always access all batch submissions on the Finance screen.