Community Gift Cards

Bookeo Configuration

Introduction

The CommunityGiftCards **Marketplace**, is a web page that is visited by gift card holders, to see where their cards can be used. This web page provides a way for those gift card holders to "Book a Tour" at various places of business. The system does this by connecting to your Tour Operator software product (Bookeo), and interacting with it by:

- listing which tours are available to be booked, based on the number of people and the date;
- determining what information needs to be collected (number of people by "category", which tour, what date, what customer information is required, etc.);
- and creating a booking with all the relevant information, directly in your software

General Flow

When a gift card holder has completed their tour booking, their gift card is "redeemed" immediately if there is enough balance on it to cover the cost of the tour (they have less to spend from their gift card on other things, as soon as they book their tour). Remember that with the Community Gift Cards platform, you will be paid through direct deposit (you would have set all of this up at the beginning). As such, you do not collect payment from the end customer yourself, but you **do** need to go into the Redeem function when the customer is at your place of business, and flag that the redemption is complete (if you do not do this, you will **not** receive a payment through direct deposit). If by any chance a customer has called you directly and wants to cancel their booking, or you need to cancel the tour yourself (perhaps the weather did not cooperate or not enough people "signed up" for the tour, etc.), you must go into Bookeo and cancel the tour for this customer. The Community Gift Cards platform will reverse the "pending" redemption usually within 24 hours of you having canceled the booking.

<u>**IMPORTANT**</u>: Once you have canceled a booking in Bookeo, you should **NEVER** "restore" it. The reason is that the CommunityGiftCards platform regularly checks the status, and if at some point the booking gets canceled, the gift card that was used gets the redemption reversed/deleted automatically, and there is no going back.

The "typical" flow is as follows:
- Customer visits Community Gift Cards Marketplace
- Customer clicks on "Book a Tour", then selects the date that they're interested in, and the number of people that they're booking for
- System displays available tours
- Customer selects which tour they want to book, and the system prompts them for all of the relevant information as defined in your Bookeo account (the system provides an estimate of the total price as they make edits)
- Customer clicks on "Get Total Price"
- System submits all of the customer supplied information to Bookeo (by submitting a "hold"), and Bookeo returns the total price, including all taxes, and the System presents this information to the Customer (note that if the total price is **more** than what is currently available on the gift card balance, the hold is still valid and the card will simply not be redeemed when they're done). If they change their information and resubmit, a new (different) hold will be created.
- Customer will click on Complete Booking
- System will submit all the same information as above to Bookeo and create a booking (releasing the "hold")
- Bookeo will respond indicating whether the booking was successful, and if so, Bookeo will send communications to you and to the customer according to your settings in Bookeo. System will store high-level information such as booking id and date of the tour, with the gift card.

- then LATER (on the date of the tour)
  - Customer visits your place of business, and presents their gift card
  - You perform the standard Redeem function on that card
    - If the gift card had enough balance to cover the cost of the tour when it was booked, then you will simply need to select the tour from the screen, and that will flag the system to indicate that you can now get paid.
      - Note that if the cost of the tour is LESS than originally quoted to the customer, log in to your Bookeo account and cancel the tour, then re-open the redeem window and the screen will have removed the tour and you can now redeem as you would normally, with the lower amount.
      - If the cost of the tour is MORE than originally quoted, follow the same approach as above, or you can go ahead and redeem the tour, then perform the redeem function again for any additional amount.
    - If the gift card did **not** have enough balance at the time of booking, you will follow your normal/typical redemption process.

- then LATER (based on the settings in the System)
  - a direct-deposit is performed, directly into your bank account, for the amount(s) that was/were redeemed on the gift card

Bookeo Configuration Settings

Log in to your Bookeo account.

The Community Gift Cards system limits what tours are visible to customers, based on a few things (these are all found under Settings in your Bookeo dashboard, after you select a specific tour):

- the tour must be a "fixed" type of product … in the vast majority of cases, what you offer is a "regular tour/activity", as opposed to appointments, etc. - the system only picks regular tours

- your settings must indicate that the tour can be booked by us (found in the General tab) … note the Visibility setting as well (*all* customers can book this tour, not just select members)

- you must accept confirmed bookings for the product (that is, you must *not* have the option of manually accepting or denying every booking) (found in the Accept/deny tab)

- the tour cannot be only available as part of prepaid packages (found in the General tab)

The System will take care of asking the customer for all of the information that you require, based on the settings in your Bookeo account – how many adults, children, infants, what options (if any) the customer wants for your tours, etc.

NOTE: Even if you specify that you want full participant details, the CommunityGiftCard system will ***NOT*** be providing that level of detail. So, the setting below (in the People tab), will not be taken into consideration. A customer is much less likely to book a tour if they need to provide specific information for every participant.