Community Gift Cards

Kleesto 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 (Kleesto), 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 Kleesto 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.

- Note that if the gift card did <u>not</u> have enough balance to cover the tour, the tour will still be created in your Kleesto account, but will now show any payments against it. The status of the booking will still be "Confirmed". It is up to you whether you want to collect payment from the customer directly (you would have to contact the customer or send them an invoice to be paid online), or wait until the customer arrives and they could potentially pay with their gift card after they've added some funds to their gift card.

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 Kleesto 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 Kleesto (by creating a "temporary" booking or a "hold"), and Kleesto returns the total price, 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 Kleesto and "commit" the booking (releasing the "hold")
- Kleesto will respond indicating whether the booking was successful, and if so, Kleesto will send communications to you and to the customer according to your settings in Kleesto. 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 Kleesto 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. Note that the system **does** show you what tours are taking place "today" at your place of business, so that you can select the tour and have the system automatically determine the balance that needs to be redeemed.

- 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

Kleesto Configuration Settings

In order to qualify, your "products" must meet the following criteria in order for them to be bookable through the gift card platform:

- Must be an "activity" or a "tour" (multi-day tours and one-off events do **not** qualify)
- Must be "shared" (as opposed to "private")
- Must be priced on a "per person" basis
- Must be available to be booked by the CGC channel that you created
- The payment policy associated with the product, for the channel, must meet the following criteria:
  - Must *not* be Direct Payment
  - Booking Instant Confirmation must be "ON" (ie. Does not require "approval" for bookings to be confirmed)
  - Availability Reserved by Default must be "ON"
  - Must be "No Commission", with no payment fees
  - **Note**: if you have not changed any settings since you created the channel per the instructions provided to you, none of these should be an issue for you

Note: If an activity/tour has more than one available "slot" for the date wanted by the customer, only the *first* available slot will be shown and will be bookable.

Additonal Services: If additional services are enabled for the selected time-slot for the tour in question, they will be presented to the user. The user will ONLY be allowed to select as many of these services, are there are people on the booking.

Descriptions: When your tours are displayed in a list of available tours, only the Tour Description is displayed. However, once the customer has clicked on a button to "Book this Tour", all of the following fields are shown in the description:

- Tour Description
- Included in Price
- Not Included in Price
- Tour Highlights
- Tour Timeline
- Meeting Points
- Drop Off Points
- Duration
- Price (by category – adults, children, etc.)

Cancellation Policy: Whatever cancellation policy you've assigned to the tour in question, is displayed to the customer prior to check-out. They will need to acknowledge having read and understood that policy before they can complete their reservation.