Rezgo 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 (Rezgo), 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 Rezgo 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 Rezgo account, but will not show any payment transaction against it. The status of the booking will be "Pending". 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 Rezgo account (the system provides estimate of the total price as they make edits)
- Customer clicks on "Get Total Price"
- System submits all of the customer supplied information to Rezgo (to get total pricing including taxes / booking fees, etc. based on all of the selections), and the System creates a temporary "hold" (valid for 5 minutes only). 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 Rezgo and "commit" the booking (releasing the "hold")
- Rezgo will respond indicating whether the booking was successful, and if so, Rezgo will send communications to you and to the customer according to your settings in Rezgo. 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 Rezgo 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
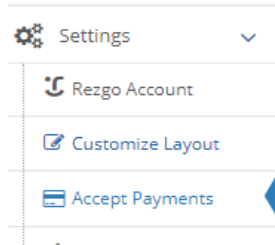
Rezgo Configuration Settings

In order to make any changes, first log in to your Rezgo account.
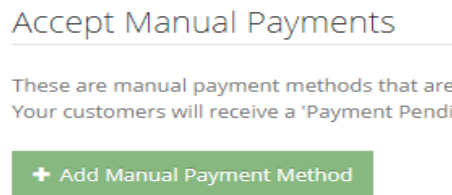
Manual payment method

> You **must** create a manual payment method in your Rezgo account in order for gift card holders to book a tour through the gift card platform (if you haven't done so already).

- Go to Settings...Accept Payments.

- On the right, in the "Accept Manual Payments" section, click on "Add Manual Payment Method"

- In the pop-up window, the Method Name must be set to **CommunityGiftCard** (no spaces, and spelled <u>exactly</u> as specified here). Do **not** make it visible, and do **not** require that a value be provided.

- NOTE: If you go to the **Activity Log** section of your dashboard, and see any entries similar to below ("API booking was declined"), it is likely that a customer tried to book a tour through the gift card platform, but the manual payment method above was not set up correctly at the time so no booking was created.

<u>Visibility</u>

Only tours that are published and are "visible" by the public can be booked.

- Go to the Inventory section of the dashboard.
- Click on the tour/inventory item.
- You should see this:

Visibility **⊕ Public**

- Go the Inventory section of the dashboard.
- Click on the tour/inventory item.
- Click on the Bookable Option for this tour.
- If there's a message indicating that this option is not published (near the top right of the page), click the Publish button:

⚠ Option is not published

☁ Publish   ✎ Edit   🗑 Delete
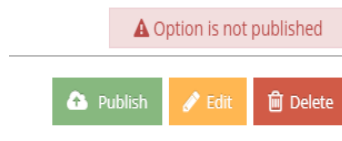
<u>Booking Fields</u>

The Community Gift Cards platform does **not** collect information for every person that will be taking the tour, but the booking that gets created <u>does</u> include information about the customer that completed the booking, as well as how many people of each category (adults, children, seniors, etc.) were included in that booking.

This means that if you have any Booking Fields that are defined at the "guest" level ("Fields for each guest in the booking", aka "Guest Forms"), those fields will be <u>ignored</u> by the platform. Bookings can and will still be made, but no guest-level information will be collected.

Booking Fields at the "booking" level ("Additional fields for booking", aka "Primary Forms") **are** taken into account and are asked to be provided by the customer. This includes any potential "priced" options, and those priced options are included in the final price totals presented to the customer when/if they choose those options.

- Note that if you've specified a primary form field as "multi-select" or "Multiple Choices", the platform will only allow the user to select one option.

<u>Pick-Up Options</u>

Some of your tours might have a "pick-up" option.

When a pick-up option is available, the customer is asked if they want to be picked up or not, and if they do, they can select from the list of pick-up locations (and associated costs).

The "Get Final Prices" functionality will **include** these pick-up costs, and the booking creation will also reflect the pick-up location selected by the customer.

As an additional eye-catcher, a **note** will get added to the booking indicating "CUSTOMER WANTS PICK-UP OPTION" as well.

<u>Terms and Conditions</u>

If you have terms and conditions set in your account (under Settings...Templates, then on the right in the "Content Pages" section, titled "Terms and Conditions"), the user will need to acknowledge that they have read and understood these terms and conditions (by checking off a box), before they can complete their booking.