

CUSTOMER ENGAGEMENT

User Guide

Global Payments

Gift card management tool

Reference guide

Reward loyal customers and attract new ones, while building your brand and revenue.

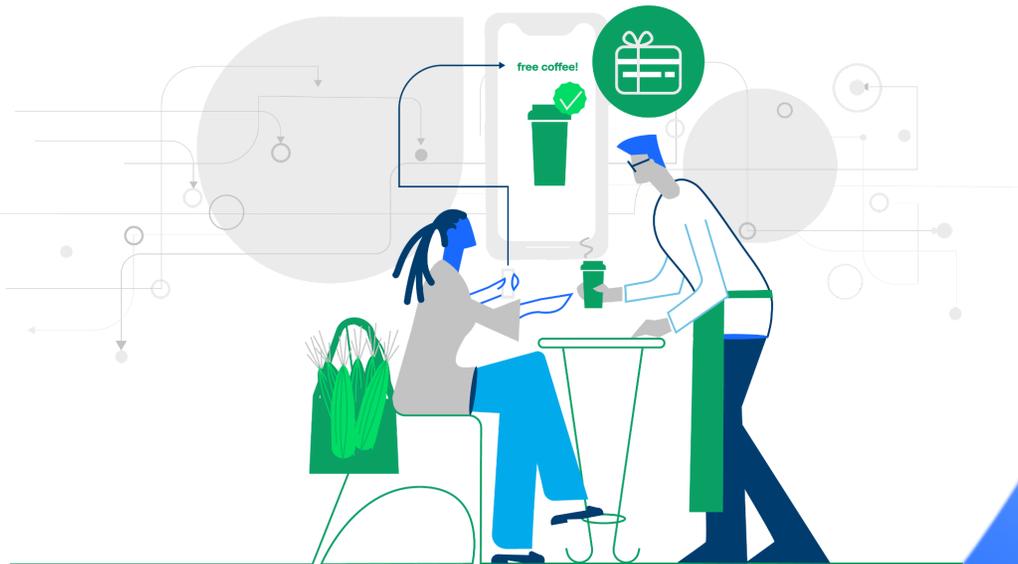


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Introduction

Gift card management tool is a one stop shop platform for all your gift card needs. Within the tool's user interface, you and your employees have the ability to:

- Process gift transactions
- Research gift card activity
- Load multiple cards at once
- View gift reporting

To help you get the most out of your gift experience we recommend that you familiarize yourself with the following key terms:

Boarding	The Gift Support team process of adding a merchant to our platform.
Account Number	The 16-19 digit number on the gift card.
Chain Number	Automatically generated number by the client manager at the time of boarding. This number is specifically linked to a card for usability.
Chain Name	Manually designated at the time of boarding. Typically the Owner's Last name and the last four digits of his or her social security number.
Merchant ID (MID)	The unique account number that refers to an individual location.
Terminal ID	The unique number associated with your point of sale device.

Now that you know some of the key terms, let's take a look at the main functions of Gift card management tool.

Home

From the home page you will have the options of

- **Reports** - Pull transaction reports, chain reports, and liability reports.
- **Account Management** - Fund reloading, redeem cards, view transaction details, and address lost card issues.
- **Bulk Request** - Activate, reload, adjust value, freeze and more on multiple accounts at once.
- **Order Management** - View standard and bulk orders.

The screenshot displays a user interface for a dashboard. On the left is a vertical navigation menu with five items: 'Overview' (selected), 'Reports', 'Account Management', 'Bulk Request', and 'Order Management'. The main content area is titled 'OVERVIEW' and contains four feature cards:

- Reports**: Access to transactional reports and liability reports. Provide summary and detail information on gift card sales and redemptions.
- Account Management**: Handle various gift card account-related activities. Includes balance checks, fund reloading, card redemption, transaction details, and address lost card issues.
- Bulk Request**: Handle a large number of gift card requests at once. Activate, reload, adjust value, freeze, and more key actions on a large number of accounts at one time.
- Order Management**: Manage all orders in one place. Search and view standard and virtual gift cards, as well as bulk orders.

Reports

From the Home page or side navigation select "**Reports**".

1. **Enter Credentials** - Search for your store by confirming and/or entering the Domain, Chain ID, Merchant Name, and Merchant ID. Then click the [Search] button.

Store Search Clear Search

Domain	Chain ID	Merchant Name	Merchant ID	
Select a Domain ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>

2. **Select Store** - Look through the list of existing stores, then click on the [Actions] drop down and select [Store Details].
3. **Filter your search** - On the store details page filter the search by time period, currency or value type to narrow your results.
4. **Export** - The report information on screen can be exported as a CSV or an Excel document.

Examples of reports below:

- Transactional Report - data on individual transactions per store that can be searched on a daily, weekly, monthly, year to date, or custom date range basis
- Detailed Report- specific transaction information such as time, store, terminal, etc.
- Liability Report - provides the totals of outstanding balances of accounts.
- Liability reports can be pulled a store level or chain level
- Chain Report - a type of liability report that will show you multiple or all locations at once.

Note:

Any unused or unactivated card still new in inventory boxes will NOT be included.

Account Management

From the Home page or side navigation, select **"Account Management"**.

In this section you can:

- Activate/Add funds, including promotional value.
- Redeem
- Freeze/Unfreeze
- Transfer to a new account
- Close an account
- Void a transaction

To begin using the Account Management section, first search for the account that you would like to view/edit.

The screenshot displays the 'ACCOUNT MANAGEMENT' section of a web application. On the left is a sidebar navigation menu with options: Home, Reports, Account Management (highlighted), Bulk Request, Manage Inventory, and Settings. The main content area is titled 'ACCOUNT MANAGEMENT' and contains an 'Account Search' form. The form has a 'Clear Search' link in the top right. It includes several input fields: 'Domains' (a dropdown menu with 'Select a domain'), 'Full Account Number/Alias', 'Chain ID', 'Last 4 digits Account Number/Alias', 'Last Name', 'Phone Number', and 'Email'. A 'Search' button is located at the bottom right of the form. Below the search form is a 'Search Result' section, which is currently empty and displays a large illustration of a person pointing at a screen with a pie chart, along with the text 'No Account Found'.

1

Enter Credentials - Search for your account by confirming the Domain, and at least one of the other fields - Account Number either the full number or last 4 digits, Chain ID, Last Name, Phone Number, and Email. Then click the [Search] button.

2

Select Account - Look through the search results, then click on the Account Number to open the account details page.

Account Number	Alias	Account Holder	Merchant Name	Chain ID	Account Open Date	Status	Last Transaction
11223*****5335	5544332211	John Smith	Ann's Cupcake	1122334455	02/01/2018	Active	11/06/2022
11223*****3400	5544332211	John Smith	Ann's Cupcake	1122334455	02/03/2018	Frozen	11/08/2022
11225*****3339	5544332211	John Smith	Ann's Cupcake	1122334455	01/23/2018	Closed	11/09/2022

3

Take Action - On the account details page you will find the Account Summary, Transaction History, and Actions Section with buttons that show what actions are available for the account.

Account Number - 1122300005335 Active [Customer Management >](#)

Available Balance \$55.48	Alias 5544332211 Account Holder John Smith Phone 923-123-1234 Email johnsmith@gmail.com Mailing Address 120384 West Westing Way Portland, OR 97206 United States Account Open Date 10/06/2021 Last Transaction Date 11/06/2022	Owning Merchant Ann's Cupcake Merchant ID 0000000000000001 Chain ID 1122334455 Merchant Address 707 SW Washington Portland, OR 97205 United States
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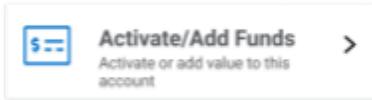
Follow the sections below to learn how to manage your gift accounts.

Activate / Add funds

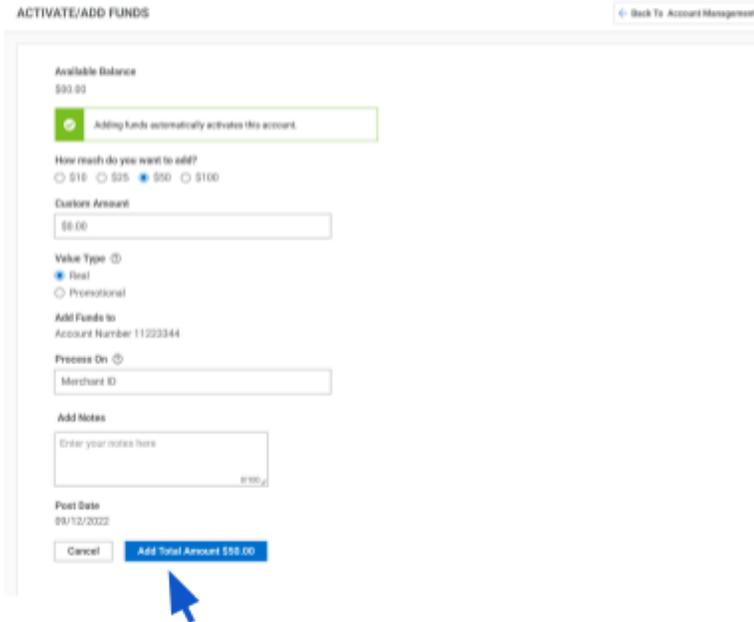
To activate a card or add funds to an account, follow the steps below.

 **Activate/Add Funds** >
Activate or add value to this account

1 Click the [Activate/Add Funds] button



2 Fill out the required fields then click [Add total Amount]



ACTIVATE/ADD FUNDS [← Back To Account Management](#)

Available Balance
\$0.00

 Adding funds automatically activates this account.

How much do you want to add?
 \$10 \$25 \$50 \$100

Custom Amount

Value Type 
 Real
 Promotional

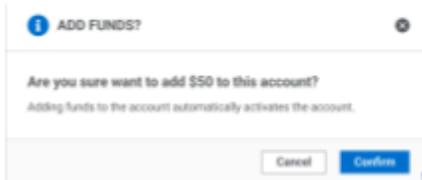
Add Funds to
Account Number 11223344

Process On 

Add Notes

Post Date
09/12/2022

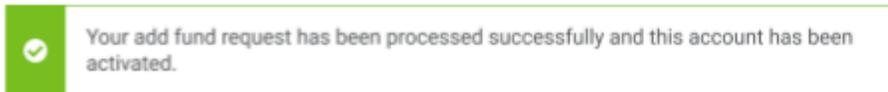
3 A confirmation window will appear, if you would like to move forward click [Confirm]



1 ADD FUNDS? 

Are you sure want to add \$50 to this account?
Adding funds to the account automatically activates the account.

4 Once the funds have been added you will get this notification at the top of the account details page.



Note: The steps for Promotional funds are almost exactly the same. The only difference is that when you select Promotional in the Value Type section you will be given an option for an expiration date.

Value Type 

Real
 Promotional

Expiration Date

If you do not want the promo to expire leave the field blank otherwise type in the preferred date and the funds will automatically be removed from the card on date.

Promotional fund will not show on liability reports.

Redeem

To redeem a value from an account, follow the steps below.

**Redeem**
Redeem a value from this account >

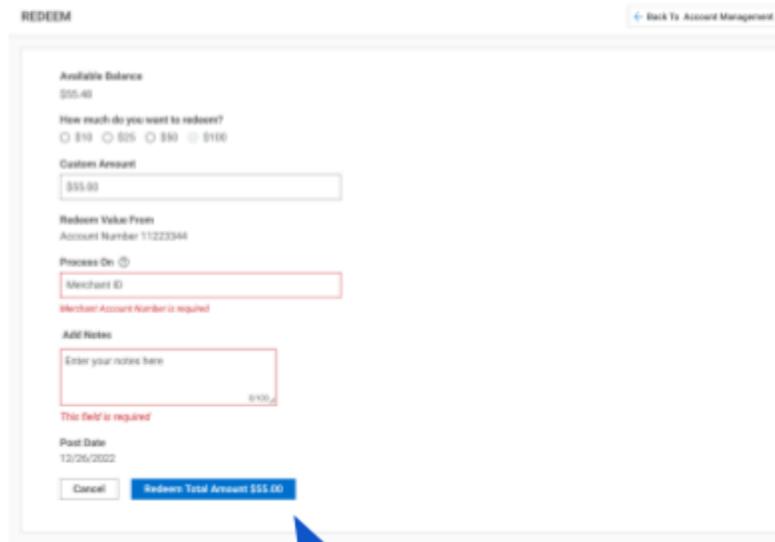
1

Click the [Redeem] button



2

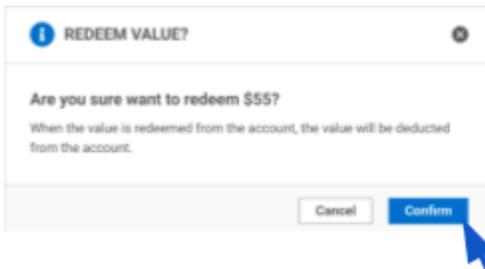
Fill out the required fields then click [Redeem Total Amount]

A screenshot of the 'REDEEM' form. It includes a 'Back To Account Management' link at the top right. The form shows an 'Available Balance' of \$55.40. Under 'How much do you want to redeem?', there are radio buttons for \$10, \$25, \$50, and \$100, with a 'Custom Amount' field containing '\$55.00'. The 'Redeem Value From' section shows 'Account Number 11223344'. The 'Process On' section has a 'Merchant ID' field with a red border and a red error message 'Merchant Account Number is required'. The 'Add Notes' section has a text area with a red border and a red error message 'This field is required'. At the bottom, there is a 'Post Date' of '12/26/2022' and two buttons: 'Cancel' and 'Redeem Total Amount \$55.00'. A blue arrow points to the 'Redeem Total Amount' button.

Note: If the custom amount exceeds the funds available, an error message will populate, and the amount must be corrected to move forward.

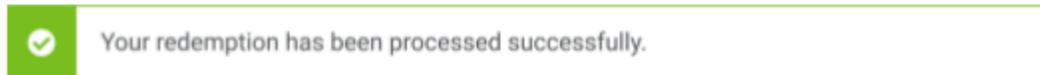
3

A confirmation window will appear, if you would like to move forward click [Confirm]



4

Once the funds have been added you will get this notification at the top of the account details page.

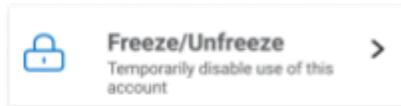


Freeze/Unfreeze

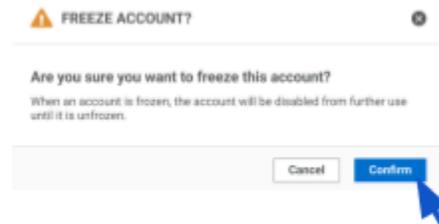
To temporarily disable use of an account, follow the steps below.

**Freeze/Unfreeze** >
Temporarily disable use of this account

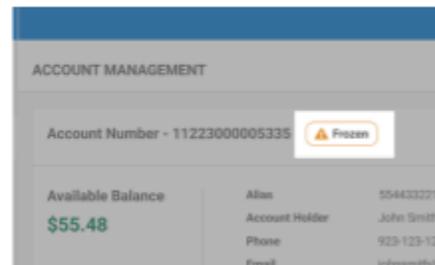
1 Click the [Freeze/Unfreeze] button



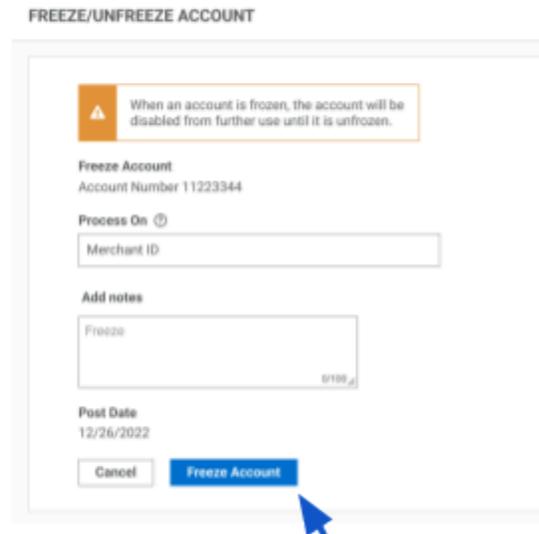
3 A confirmation window will appear, if you would like to move forward click [Confirm]



5 The account will also show that it is frozen to the right of the account number in the Summary section.



2 Fill out the required fields then click [Freeze Account]



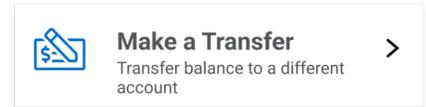
4 Once the funds have been added you will get this notification at the top of the account details page.



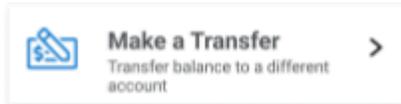
6 To unfreeze an account that is in a Frozen status, click the [Unfreeze] button.

Transfer to a new account

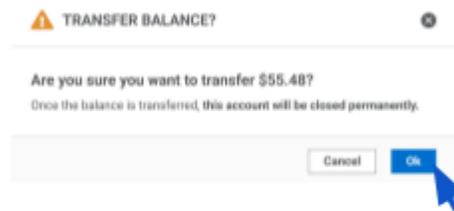
To transfer balance to a different account, follow the steps below.



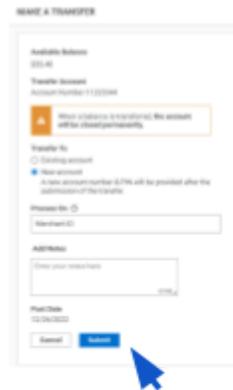
1 Click the [Make a Transfer] button



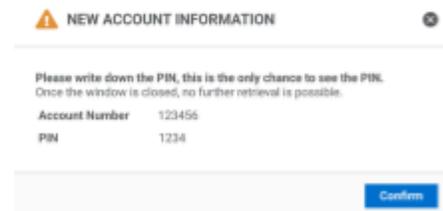
3 A confirmation window will appear, click [Ok] to continue.



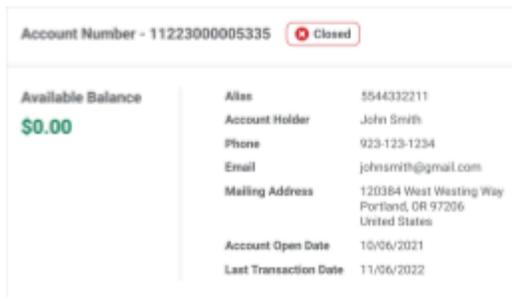
2 Fill out the required fields then click [Submit]



4 Once the account has been transferred an information window for the new account will appear. Take note of the account number and PIN for future reference, then click [Confirm]

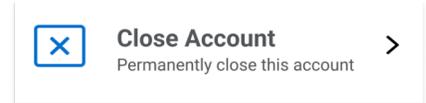


5 Once the new card is active the old card will show that it is "Closed" by showing this icon directly to the right of the account number on the account details page.

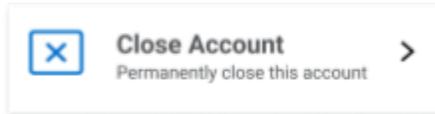


Close account

To permanently close an account, follow the steps below.



1 Click the [Close Account] button



2 Fill out the required fields then click [Close Account]

CLOSE ACCOUNT

Warning: There is still a balance on this account! When an account is closed, the balance will be lost forever and the account will be permanently disabled.

Close Account
Account Number 11223344

Process On ⓘ
Merchant ID

Add notes
Enter your notes here

Post Date
12/26/2022

Cancel Close Account

Important:
Once an account is closed it **CANNOT** be reopened.

3 A confirmation window will appear, click [confirm] to continue.

Warning: Are you sure you want to close this account?
The remaining balance will be lost forever and the account will be permanently disabled if you close this account.

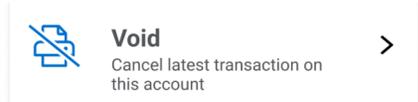
Cancel Confirm

4 Once the account is closed, the details will show that it is "Closed" by showing this icon directly to the right of the account number on the account details page.

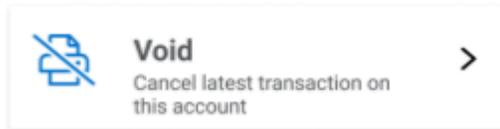
Account Number - 1122300005335 Closed		Customer Management >	
Available Balance \$0.00	Alias 5544332211	Owning Merchant Ann's Cupcake	
	Account Holder John Smith	Merchant ID 000000000000001	
	Phone 923-123-1234	Chain ID 1122334455	
	Email johnsmith@gmail.com	Merchant Address 707 SW Washington Portland, OR 97205 United States	
	Mailing Address 120384 West Westing Way Portland, OR 97206 United States		
	Account Open Date 10/06/2021		
	Last Transaction Date 11/06/2022		

Void a transaction

To cancel the latest transaction on an account, follow the steps below.



- 1 Click the [Void] button



Or select the **Void** option in the transaction history

Transaction History December 10, 2021 thru December 30, 2022

Transaction Type: Show All Download Statements

Post Date	Owning Merchant	Action Type	Amount	Status	Balance	
11/06/2022 06:50:54 pm ET	Ann's Cupcake Allstar Way	Redeem	-12.89 USD	Approved	55.48 USD	Actions ▾ View Details Void
10/26/2022 04:46:32 pm ET	Ann's Cupcake Allstar Way	Load	10.00 USD	Approved	68.37 USD	Actions ▾
10/15/2022 11:32:54 pm ET	Ann's Cupcake Allstar Way	Redeem	-13.76 USD	Approved	58.37 USD	Actions ▾
10/06/2022 08:50:52 pm ET	Ann's Cupcake Allstar Way	Redeem	-3.89 USD	Approved	72.13 USD	Actions ▾
10/06/2022 06:30:54 pm ET	Ann's Cupcake Allstar Way	Redeem	-23.89 USD	Approved	100.00 USD	Actions ▾
10/06/2022 06:32:34 pm ET	Ann's Cupcake Allstar Way	Redeem	-23.98 USD	Failed	76.02 USD	Actions ▾
10/01/2022 03:50:54 pm ET	Ann's Cupcake Allstar Way	Load	100.00 USD	Approved	100.00 USD	Actions ▾

Show 10 per page Showing records 1-10 of 96 Prev Page 1 of 3 Next

Note:
Only the most recent transaction can be voided.

If a correction is needed for an older transaction, an adjustment transaction should be performed.

- 2 An information window will display the transaction details. A note must be entered in the **Add Notes** box. Press **Process** to void the transaction.

Bulk request

From the Home page or side navigation, select **"Bulk Request"**.

In this section you can:

- Bulk Activate/Add Value
- Bulk Deactivate
- Bulk Adjust Balance
- Bulk Freeze
- Bulk Unfreeze

The screenshot displays the 'BULK REQUEST' interface within the 'GIFT MANAGEMENT' section. The left sidebar contains navigation options: Home, Reports, Account Management, Bulk Request (highlighted), and Order Management. The main content area features five action cards: 'Bulk Activate/Add Value' (with a checkmark icon), 'Bulk Deactivate' (with a minus icon), 'Bulk Adjust Balance' (with a double-headed arrow icon), 'Bulk Freeze' (with a lock icon), and 'Bulk Unfreeze' (with an open lock icon). Below these cards is a 'Bulk Request Search' section with a 'Clear Search' link. The search filters include 'Domain' (a dropdown menu), 'Chain ID', 'Merchant ID', and 'Order ID' (text input fields), and 'Order Status' and 'Action Type' (dropdown menus). A 'Search' button is located at the bottom right of the search section. The 'Bulk Request History' section below is currently empty, displaying a message: 'No search criteria is entered Please Search' accompanied by an illustration of a person pointing at a pie chart.

Bulk Activate/Add Value

To activate or add value on a range of accounts, follow the steps below.

 **Bulk Activate/Add Value >**
Activate or add value on a range of accounts

1 Click the [Bulk Activate/Add Value] button

 **Bulk Activate/Add Value >**
Activate or add value on a range of accounts

3 A confirmation window will appear. It will include the number of accounts, the currency and amount, and card numbers range that will be affected by the bulk add. If you would like to continue click [Confirm]

BULK ACTIVATE/ADD VALUE?

Are you sure want to activate/add value to these 11 accounts?
Add \$10.00 Per Account
Activate and add value to the following account range:
10000000 thru 10000010

4 A notification will appear to confirm completion

 This bulk activate/add value request has been submitted successfully.

2 Fill out the required fields and then Click [Submit]

BULK ACTIVATE/ADD VALUE [Back to Bulk Request](#)

Adding funds automatically activates all of the new/inactive accounts entered.

Request Information

Domain:

Chain ID:

Process On:

Submission

Submission Type: Manual File Upload

Bulk Action Details

Account Type: New/inactive accounts Active accounts

Account Range Type: Life Linear

Account Range: to

Currency:

Amount Per Account:

Value Type: Fund Promotional

Add Notes:

Post Date: 8/12/24 13:23

Bulk Deactivate

To set the unused range of accounts return to the new/inactive state, follow the steps below.

 **Bulk Deactivate** >
Set the unused range of accounts return to the new/inactive state

1 Click the [Bulk Activate/Add Value] button

 **Bulk Deactivate** >
Set the unused range of accounts return to the new/inactive state

3 A confirmation window will appear. It will include the number of accounts and card number range that will be affected by the bulk deactivation. If you would like to continue click [Confirm]

BULK DEACTIVATE ACCOUNTS?

Are you sure you want to deactivate these 11 accounts?
Deactivation will set the range of accounts return to the new/inactive state
Deactivate the following account range: 10000000 thru 10000010

4 A notification will appear to confirm completion

 This bulk deactivate request has been submitted successfully.

2 Fill out the required fields and then Click [Submit]

BULK DEACTIVATE [Back to Bulk Request](#)

Deactivation will set the range of accounts return to the new/inactive state

Request Information

Domain
Select a domain

Chain ID
Chain ID

Process On
Merchant ID

Submission

Submission Type
 Manual
 File Upload

Bulk Action Details

Account Range Type
 Latin
 Linear

Account Range
First Account Number to Last Account Number

Add Notes
test

Post Date
12/26/2023

Summary

Number of Accounts
11

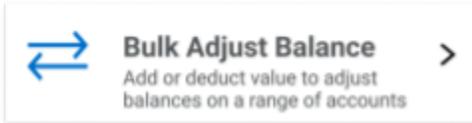
Affected Accounts
Deactivation the following account range:
10000000 thru 10000010

Bulk Adjust Balance

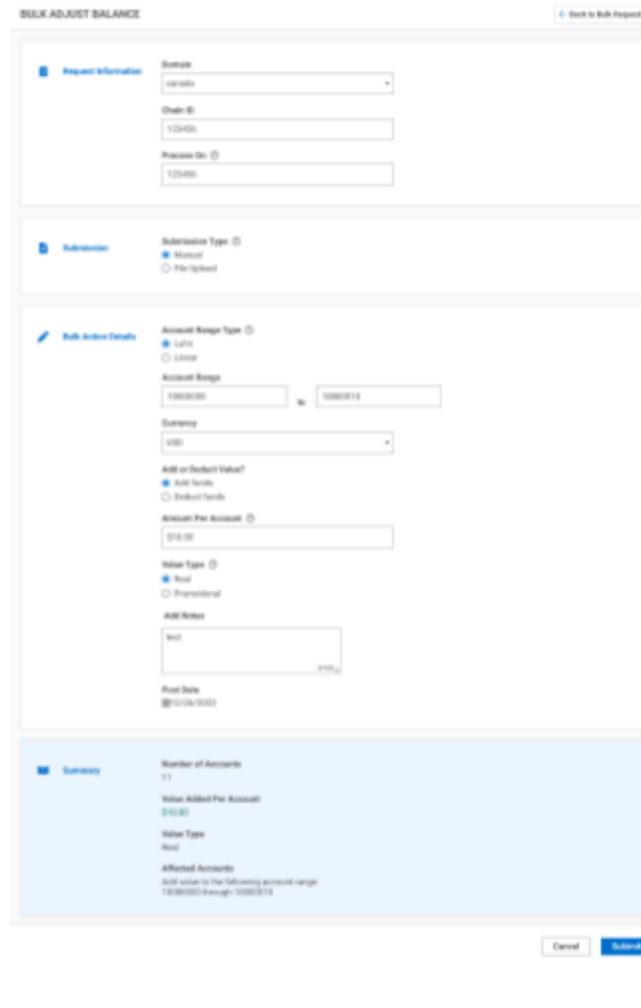
To add or deduct value to adjust balances on a range of accounts, follow the steps below.

**Bulk Adjust Balance** >
Add or deduct value to adjust balances on a range of accounts

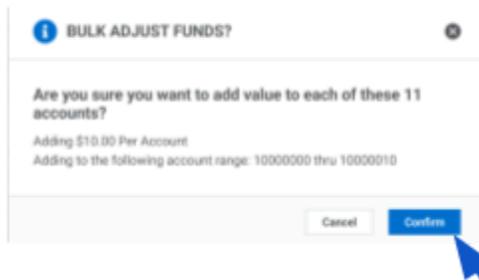
1 Click the [Bulk Adjust Balance] button



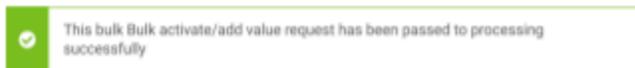
2 Fill out the required fields and then Click [Submit]

A screenshot of the "BULK ADJUST BALANCE" form. It has a "Back to Bulk Request" link at the top right. The form is divided into sections: "Request Information" with fields for "Details" (dropdown), "Chain ID" (text), and "Process On" (text); "Submission" with radio buttons for "Manual" (selected) and "File Upload"; "Bulk Action Details" with radio buttons for "Add" (selected) and "Deduct", "Account Range" (text with "to" separator), "Currency" (dropdown), "Add or Deduct Value?" (radio buttons for "Add Funds" selected and "Deduct Funds"), "Amount Per Account" (text), "Value Type" (radio buttons for "Real" selected and "Provisional"), "Add Notes" (text area), and "Post Date" (text); and a "Summary" section at the bottom with a light blue background, showing "Number of Accounts: 11", "Value Added Per Account: \$10.00", "Value Type: Real", and "Affected Accounts: All under the following account range: 10000000 through 10000010". "Cancel" and "Submit" buttons are at the bottom right, with a blue arrow pointing to "Submit".

3 A confirmation window will appear. It will include the number of accounts and card number range that will be affected by the bulk adjusted balance. If you would like to continue click [Confirm]



4 A notification will appear to confirm completion

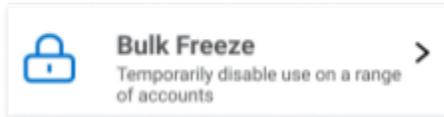


Bulk Freeze

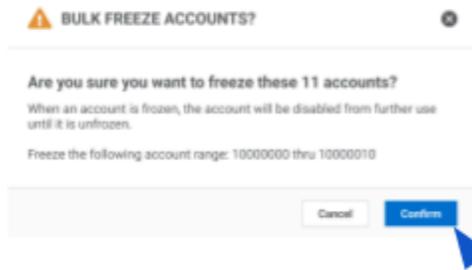
To temporarily disable use on a range of accounts, follow the steps below.

**Bulk Freeze**
Temporarily disable use on a range of accounts

1 Click the [Bulk Freeze] button



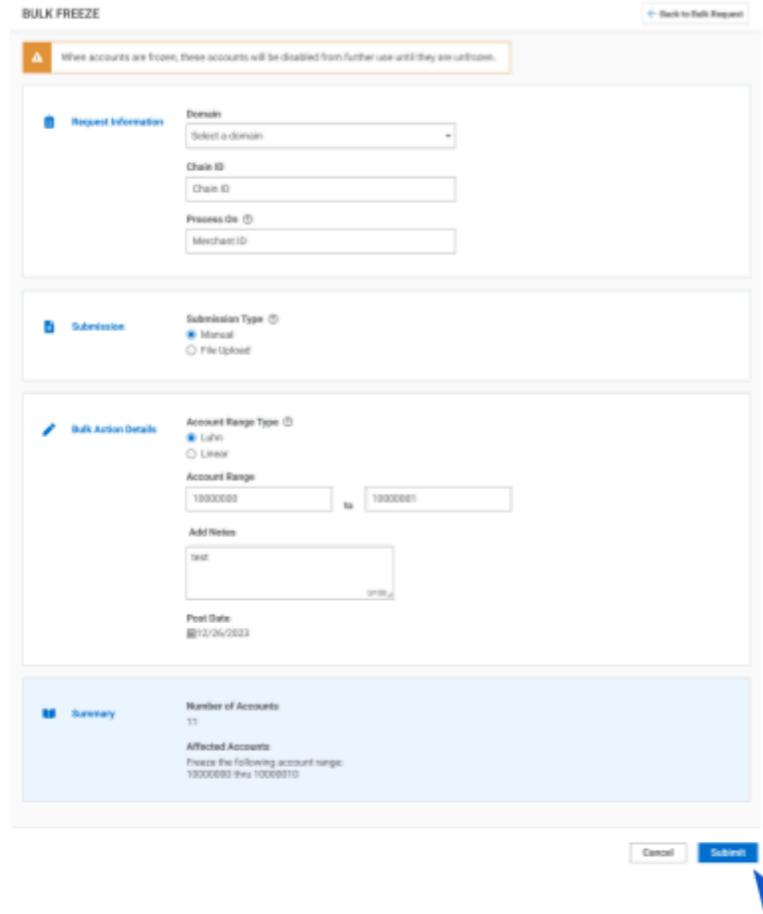
3 A confirmation window will appear. It will include the number of accounts and card number range that will be affected by the bulk freeze. If you would like to continue click [Confirm]



4 A notification will appear to confirm completion



2 Fill out the required fields and then Click [Submit]

A form titled "BULK FREEZE" with a "Back to Bulk Request" link. It contains several sections: "Request Information" with fields for Domain (dropdown), Chain ID, Process ID, and Merchant ID; "Submission" with radio buttons for Manual (selected) and File Upload; "Bulk Action Details" with radio buttons for Luhn (selected) and Linear, an "Account Range" field with values 10000000 and 10000010, an "Add Notes" text area, and a "Post Date" field with value 12/26/2023; and a "Summary" section showing "Number of Accounts: 11" and "Affected Accounts: Freeze the following account range: 10000000 thru 10000010". At the bottom right, there are "Cancel" and "Submit" buttons, with a blue arrow pointing to "Submit".

Bulk Unfreeze

To enable use on a range of frozen accounts, follow the steps below.

**Bulk Unfreeze**
Enable use on a range of frozen accounts >

1 Click the [Bulk Unfreeze] button

**Bulk Unfreeze**
Enable use on a range of frozen accounts >

3 A confirmation window will appear. It will include the number of accounts and card number range that will be affected by the bulk Unfreeze. If you would like to continue click [Confirm]

BULK UNFREEZE ACCOUNTS?

Are you sure you want to unfreeze these 11 accounts?
Unfreezing will activate the accounts and make them available for regular use.
Unfreeze the following account range: 10000000 thru 10000010

4 A notification will appear to confirm completion

 This bulk unfreeze request has been submitted successfully.

2 Fill out the required fields and then Click [Submit]

BULK UNFREEZE [← Back to Bulk Request](#)

Unfreezing will activate the accounts and make them available for regular use.

Request Information

Details

Canada

Chain ID
123457

Process On:

12345678

Submission

Submission Type Manual File Upload

Bulk Action Details

Account Range Type Linear Linear

Account Range
10000000 to 10000010

Add Notes

Post Date
12/24/2023

Summary

Number of Accounts
11

Affected Accounts
Unfreeze the following account range:
10000000 thru 10000010

Order management

From the Home page or side navigation, select “**Order Management**”. To manage orders, follow the steps below.

- 1 Enter Credentials** - Search for your store by confirming and/or entering the Domain, Chain ID, Merchant Name, and Merchant ID. Then click the [Search] button.

Order Search Clear Search

Domain: Order ID: Merchant ID:

Type:

Order Type: Order Status:

Standard Show All

- 2 Select Store** - Look through the list of existing stores, then click on the [Actions] drop down and select [Store Details].

Order History Last 30 days Export

Post Date	Order ID	Order POS ID	Order Type	Order Status	Actions
11/05/2022 06:30:54 pm ET	1234567	100000001	Standard	Complete	Actions

- 3 Filter your search** - On the search results page you can filter the search by time period, Order status or order type to narrow your results.

Today

Last 7 Days < >

Last 30 Days

This Month

Last Month

Custom Range

Nov 2020							Dec 2020						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7	29	30	1	2	3	4	5
8	9	10	11	12	13	14	6	7	8	9	10	11	12
15	16	17	18	19	20	21	13	14	15	16	17	18	19
22	23	24	25	26	27	28	20	21	22	23	24	25	26
29	30	1	2	3	4	5	27	28	29	30	31	1	2

- 4 Export** - The report information on screen can be exported as an CSV or an Excel document.

Support

For additional support, contact the Global Payments Gift Card team at: [1.888.682.3309](tel:18886823309), and select option 2.