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Gift Certificate Implementation Guide

Everything in Site. Content. eCommerce. Customers

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Introduction

Gift Certificates were added to CommerceCM build 3.1.0.7 which was released in October 2009. Gift Certificates are included in the CommerceCM standard license but require some additional one time design and implementation costs. These costs vary based on your requirements and existing design but range from about \$300 to \$1000.

This document was created to outline the process for CommerceCM merchants and create a checklist of items that need to be in place so you can launch Gift Certificates for your customers.

The basic features are:

- Shopper can purchase gift certificates for multiple people at a time as long as they are all in the same currency.
- Certificates can be for any value within a lower and upper limit determined by the merchant.
- 3) Each Gift Certificate can have a personalized message from the shopper
- 4) Gift Certificates can be scheduled for future delivery
- 5) Certificates are delivered by email
- 6) The recipient must register the gift certificate at your site before using it
- Remaining balance after purchased is stored for future use.

Regulations

Most jurisdictions have regulations around gift certificates, gift cards, or pre-paid purchase cards. It is up to the merchant to ensure that their policies are in compliance with their local regulations. Considering the international nature of eCommerce we recommend that all merchants abide by the most strict interpretation of the regulations. The current version of Gift Certificates in CommerceCM does not allow a merchant to block customers in specific jurisdictions.

In most jurisdictions, **gift certificates or pre-paid gift cards cannot have an expiry date** unless they are being used for promotional or charity purposes. The current implementation of Gift Certificates in CommerceCM does not support this use and we recommend that Coupons be used for promotional purposes.

In the past, some merchants charged a monthly maintenance fee if the gift certificate still had a balance after a specified period. This was useful in that it enabled a merchant to reduce their outstanding gift certificate or gift card liability. These charges are now not permitted in most jurisdictions and we chose not to support them in this version of the component in CommerceCM.

Multi-Channel Merchants

Merchants with retail locations will need to make it clear that these are ONLINE ONLY gift certificates and create in house policies to deal with shoppers appearing in store with Gift Certificates.

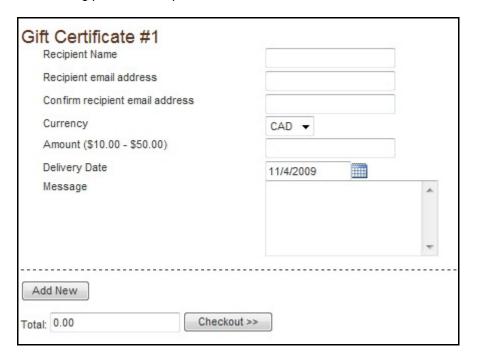
Purchase

Gift Certificates are purchased by shoppers through a separate process than regular products. . A shopper cannot purchase products and Gift Certificates in a single transaction. This was necessary because of CommerceCM's multi-currency foundation which has arbitrage prevention. The Gift Certificate process is the only way a Canadian shopper can make a US dollar purchase and vice versa. The shopper must anticipate the default currency of the recipient and purchase a the Certificate in the correct currency.

We based this Gift Certificate model on Amazon.com so many online shoppers should be familiar with it.

Gift Certificates are purchased from a custom department template styled to fit your needs. It can include an image and introductory text.

The ordering process is simple.



If the shopper adds another Gift Certificate, it will have the same currency as their first gift certificate. If they need Gift Certificates in multiple currencies, they must be purchased in separate transactions.

The delivery date is defaulted to the current date and can be set for each Gift Certificate ordered.

On checkout, the shopper is taken into a two step process based on your existing checkout. There is no option to enter coupon codes, shipping address, or shipping method.

On the payment page the shopper is shown their order details including the recipient details, delivery date amount and gift message for each Gift Certificate.

This same information is presented on the Order Confirmation page and the Order Summary that is emailed to the shopper and the merchant.

The purchaser is never sent a copy of the Gift Certificate code but it is available to the merchant in the CommerceCM Manager.



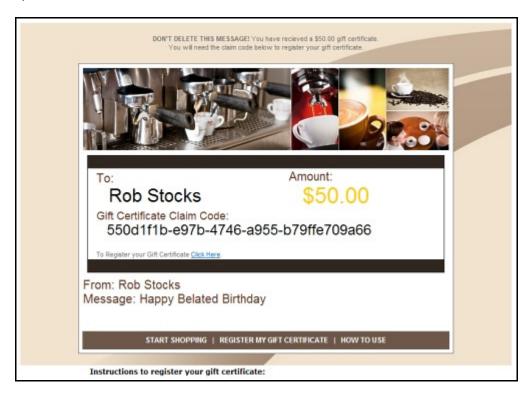
On the delivery date the Recipient is emailed their Gift Certificate.

Registration and Redemption

The Certificate email can be branded to meet the requirements of the merchant.

The Certificate should show

- 1) Recipient name
- 2) Amount
- 3) Unique Gift Certificate Code
- 4) Link to register the code
- 5) Message
- 6) Instructions
- 7) Terms & Condistions



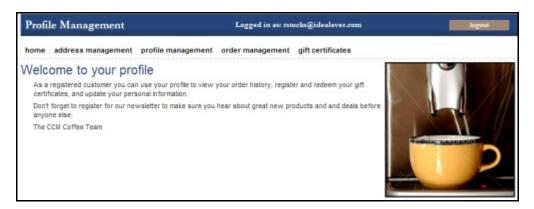
The recipient is prompted to visit the merchant's site to register their Gift Certificate. Registration accomplishes a couple of goals.

- 1) It takes the Certificate code out of circulation reducing the possibility of fraud
- It establishes a relationship between you and the Recipient introducing them to your products

If the recipient is already a customer they just have to login to your site on your existing customer login page.

If they are a new customer they will have to register by entering their email address and creating password.

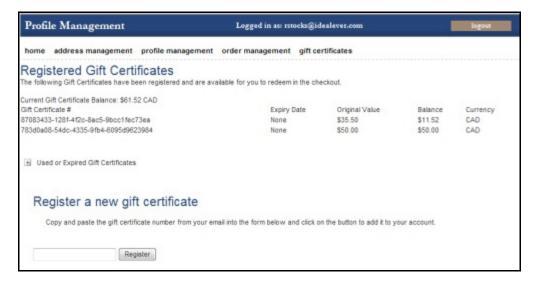
When they are logged in, the welcome message can direct them to register their gift certificate, or they can click the "Gift Certificates" link in their profile navigation



If they have existing Gift Certificates that still have a balance they are shown at the top of the Gift Certificate page. If they do not have any active Gift Certificates, this section does not show.

Gift Certificates that have already been fully Redeemed can be shown by clicking the link in the middle of the page.

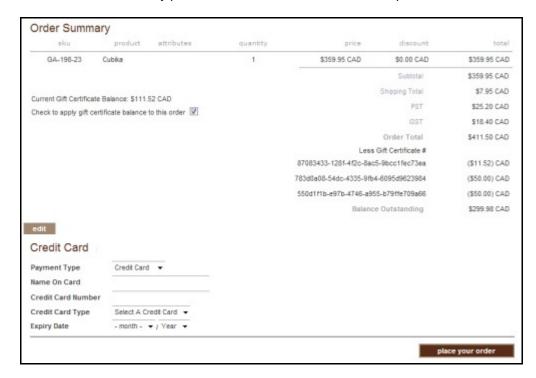
They can copy and paste their Gift Certificate code into a field to register their gift certificate. If the code is not valid or has already been registered, they are presented with appropriate warning messages. If the code is valid, the balance is added to the Registered Gift Certificates List.



The shopper must be logged in to your site to be able to Redeem their Gift Certificate. They can do this before shopping or on Step 1 of the checkout.

When shopping while logged in, the customers Gift Certificate balance from all of their registered gift certificates will be shown above their basket.

On the final step of their purchase the Gift Certificate Balance is automatically applied to the order. The shopper can choose not to apply their Gift Certificate to the order. They cannot choose to use only part of their Gift Certificate Balance on a purchase.



The Gift Certificate Balance is applied after shipping and taxes have been applied reducing the amount if any that will be applied against their credit card.

If their credit card is declined for the order, their Gift Certificate Balance is not affected.

If there is no outstanding balance, the shopper must still complete the order by clicking the "checkout" button.



On completion their order confirmation shows the Gift Certificates applied and the method used to pay for the balance



Reminders

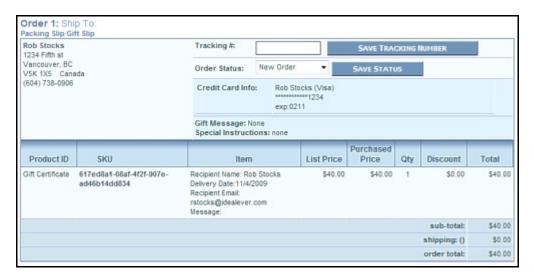
The system will send several reminders to the Gift Certificate recipient. These can be branded and the schedule can be set by the merchant.

- 1) After Delivery Email: sent after the Certificate was purchased if it has not been Registered. This could be sent 7 to 30 days after original delivery.
- After Registration Email: sent after the Certificate has been registered but not used.
 This could be sent 30 to 60 days after it was registered just in case the shopper forgot.
- 3) After Last Use: sent after the Certificate has been used if it still has an outstanding balance. This could be sent 45 to 90 days after it was last used to encourage the shopper to return and redeem the remainder of their Certificate.

Manager Updates

The introduction of Gift Certificates introduced changes throughout the CommerceCM manager. These will be covered in more detail in your training but here are a few things to look for.

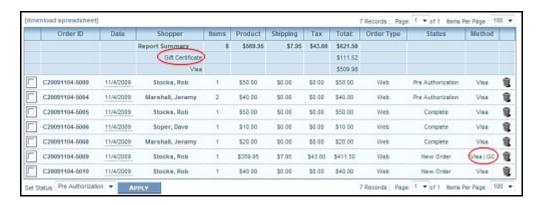
When a Gift Certificate is purchased the code is shown in the Manager on the order details page.



Anywhere that you see a GC code, you can click through to view details that show when the GC was purchased, who purchased it, when it was registered and on what orders.

Another change is that purchases can now have more than one payment method. You can see this in your summary reports and in your order details.





Customers using the order download function will also notice changes in the H row to accommodate the multiple payment methods. Contact ideaLEVER for current documentation.

In the sample below you can see that the Gift Certificate was purchased by Dave Soper and was redeemed by Rob Stocks on two orders.



If a Gift Certificate has not been used, it can be Reissued. This can be used if the shopper entered the email address incorrectly or if it was never received by the shopper.



Reissue cancels the original Gift Certificate code and sends another which can be sent to a new email address. The relationship with the original order is maintained and traceable in the CommerceCM Manager.

You can also view all Certificates registered by a customer on their shopper profile



There is also a Gift Certificate manager added to the bottom of the Reports Menu



Customers using the order download function will also notice changes in the H row to accommodate the multiple payment methods.

Implementation Requirements

1) Shopper Login

Your site must allow shoppers to Login. This is usually included near the top of your site near the cart controls. This is where your customers can login to update their profile or check their order satus.

If your site is not using this feature, it will need to be incorporated into your design.

If this is already active, you will need to update your text on the login page and the registered customer landing page to include Gift Certificate messaging.

2) Gift Certificate Department

You will need to determine what you want this page to look like and what it will say.

3) Department Placement

You need to determine where you want the Gift Certificates to appear in your site navigation.

4) Terms & Conditions

We have included some in an appendix for reference. Your Terms & Conditions can be included in the Gift Certificate eMail and should also exist as a SiteCM page linked from your Gift Certificate Department.

- 5) Maximum and Minimum Values
- 6) Maximum Certificates in one order: our default is 3, it can be from 1 to any value you feel is appropriate.
- 7) Gift Certificate eMail Design
- 8) Gift Certificate Reminder Designs

These can be quite simple but should include branding and an enticing message to get the Recipient to go to the site.

9) Reminder Schedule

Appendix 1: Terms & Conditions

These are provided for guidance only and should not be interpreted as endorsement or legal advice.

Chapters Indigo

Electronic Gift Certificates

Electronic Gift Certificates ("Electronic Gift Certificates") can only be redeemed online at chapters.indigo.ca toward the purchase of eligible merchandise. Your Electronic Gift Certificate will be deposited into your Online Account. Purchases are then deducted from your Online Account balance. Any unused balance will remain in your Online Account until redeemed. If an order exceeds the value of the tendered Electronic Gift Certificate, the balance must be paid with a credit card or other available payment method.

Electronic Gift Certificates cannot be used to purchase Gift Cards or Electronic Gift Certificates.

Electronic Gift Certificates cannot be refunded, re-sold, transferred for value, redeemed for cash and are not negotiable instruments.

The risk of loss and title for Electronic Gift Certificates passes to the purchaser upon our electronic transmission to the recipient. Indigo is not responsible for lost or stolen Electronic Gift Certificates.

To obtain the balance on your Electronic Gift Certificate, go to chapters.indigo.ca.

Indigo reserves the right to hold any order for a security review. If your order is affected you will be notified via email within two business days.

Indigo reserves the right to close customer accounts and request alternative forms of payment if a fraudulently obtained Electronic Gift Certificate is either redeemed through the chapters.indigo.ca website or is redeemed and used to make purchases on the chapters.indigo.ca website.

Indigo reserves the right to cancel an Electronic Gift Certificate at any time if obtained illegally including through fraud.

Gift Cards

The Indigo Gift Card ("Gift Card") is redeemable for merchandise at any Chapters, Indigo, Coles, Smithbooks, World's Biggest Bookstore location and online at chapters.indigo.ca. Your receipt will show the remaining balance on your Gift Card. Purchases will be deducted from the card amount until the value reaches zero. Refunds on items purchased with Gift Cards will be re-applied to the Gift Card.

Gift Cards cannot be used for online purchases of Gift Cards or Electronic Gift Certificates.

Gift cards cannot be refunded, re-sold, are not redeemable for cash, are not negotiable instruments and cannot be replaced if lost of stolen.

To obtain the balance on your Gift Card, go to chapters.indigo.ca. or Contact Us

Indigo reserves the right to cancel a Gift Card at any time if obtained illegally including through fraud.

In various provinces expiry dates are now void, even if an expiry date is printed on a card. Indigo has never imposed expiry dates and, as always, Indigo gift cards are welcome at all Indigo, Indigo spirit, Chapters, Coles, The Book Company and World's Biggest bookstore locations as well as online.

Amazon

Terms and Conditions

1. Redemption.

Gift Certificates must be redeemed through the Amazon.ca Web site, http://www.amazon.ca, toward the purchase of eligible products. Purchases are deducted from the Gift Certificate balance. Any unused balance will be placed in the recipient's Gift Certificate account when redeemed. If an order exceeds the amount of the Gift Certificate, the balance must be paid with a credit card or other available payment method. To redeem or view Gift Certificate balances, visit "Your Account" on Amazon.ca.

2. Limitations.

- * Gift Certificates cannot be redeemed for purchases from third party sellers accessible from www.amazon.ca.
- * Gift Certificates may not be redeemed for the purchase of products through in-store pickup, or at Amazon.com, Amazon.co.uk, Amazon.de, Amazon.fr, Amazon.co.jp, or any other Web site operated by Amazon.com, its affiliates, or any other person or entity.
- * Gift Certificates cannot be used to purchase other Gift Certificates, such as Amazon.ca Gift Certificates or gift certificates issued by third parties.
- * Gift Certificates cannot be reloaded, resold, transferred for value, redeemed for cash or applied to any other account, except to the extent required by law. Unused Gift Certificate balances in an Amazon account may not be transferred.
- * Gift Certificates and unused portions of Gift Certificates become void two years from the date of issue of the original Gift Certificate.*

3. Our Policies.

Gift Certificates and their use on the Amazon.ca Web site are subject to Amazon.ca's general Conditions of Use and Privacy Notice. Amazon.ca may provide Gift Certificate purchasers with information about the redemption status of Gift Certificates.

4. Risk of Loss.

The risk of loss and title for Gift Certificates pass to the purchaser upon our electronic transmission to the recipient. We are not responsible for lost or stolen Gift Certificates. If you have any questions, please see the Gift Certificate help pages.

5. Fraud.

Amazon.ca will have the right to close customer accounts and request alternative forms of payment if a fraudulently obtained Gift Certificate is either redeemed through the Amazon.ca Web site or is redeemed and used to make purchases on the Amazon.ca Web site.

6. Limitation of Liability.

AMAZON.COM.CA, INC. ("AMAZON.CA") AND ITS AFFILIATES MAKE NO WARRANTIES, EXPRESS OR IMPLIED, WITH RESPECT TO GIFT CERTIFICATES, INCLUDING WITHOUT LIMITATION, ANY EXPRESS OR IMPLIED WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. IN THE EVENT A GIFT CERTIFICATE CODE IS NON-FUNCTIONAL, YOUR SOLE REMEDY, AND OUR SOLE LIABILITY, SHALL BE THE REPLACEMENT OF SUCH GIFT CERTIFICATE. CERTAIN LAWS DO NOT ALLOW LIMITATIONS ON IMPLIED WARRANTIES OR THE EXCLUSION OR LIMITATION OF CERTAIN DAMAGES. IF THESE LAWS APPLY TO YOU, SOME OR ALL OF THE ABOVE DISCLAIMERS, EXCLUSIONS, OR LIMITATIONS MAY NOT APPLY TO YOU, AND YOU MIGHT HAVE ADDITIONAL RIGHTS.

Disputes.

Any dispute relating in any way to Gift Certificates in which the aggregate total claim for relief sought on behalf of one or more parties exceeds CDN \$7,500 shall be adjudicated in any state or federal court in King County, Washington, and you consent to exclusive jurisdiction and venue in such courts.

8. General Terms.

Amazon.ca Gift Certificates are issued by Amazon.com.ca, Inc., a Delaware corporation. By visiting Amazon.ca, you agree that the laws of the State of Washington, without regard to principles of conflict of laws, will govern these Gift Certificate terms and conditions. Amazon.ca reserves the right to change these terms and conditions from time to time in its discretion. All terms and conditions are applicable to the extent permitted by law.

Some jurisdictions may extend or void the expiration date by law. Expiration dates do not apply for Gift Certificates issued in Alberta, British Columbia, Ontario, Manitoba, New Bruswick or any other jurisdiction solely to the extent as prohibited or limited by law.

Mcnally Robinson

McNally Robinson Gift Cards can be purchased at any of our locations, or on our website. They can be redeemed in our stores, restaurants, or online.

- 1. In-Store Gift Cards In-Store Gift Cards can be redeemed at any McNally Robinson Booksellers or Prairie Ink & Bakery location within Canada, as well as on our website. When purchased online, a plastic Gift Card will be mailed to the recipient.
- 2. Online Gift Cards Online Gift Cards can only be purchased online. Instead of sending a physical Gift Card, we will email a Gift Card code to both the purchaser and the recipient of the Online Gift Card. To redeem, simply enter this code in the Gift Card Box at the final

checkout screen when making an online purchase. The code can also be used to make purchases at any of our stores or restaurants.

Victoria Secret

Terms and Conditions

Gift cards are issued by Victoria's Secret Direct GC, LLC and are redeemable for merchandise only at Victoria's Secret store locations, phone, and online at VictoriasSecret.com, unless otherwise required by applicable law. Special offers do not apply to the purchase of giftcards.