# Gift Cards, Loyalty Accounts & Grants

User Guide

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# FAQ

## What Are Gift Cards, Loyalty Accounts and Grants?

Doubleknot's new features empower organizations to:

- **Issue electronic gift cards**. Administrators can create gift cards in any amount. If you want to sell gift cards online or at Sales Station, you will also use Doubleknot's Store Management to create a gift card product for sale.
- **Create loyalty accounts**. Loyalty accounts are similar to gift cards. Administrators can add earned rewards to loyalty account, and the account holder can use the account to pay for Doubleknot items.
- **Create and assign grant funds**. If your organization receives grants or similar funding to apply to admissions, school group visits or camp registration (those are just a few examples!), you can create a grant account for the funds. Grant funds can only be used by administrators. For example, if a corporate sponsor awarded your organization $10,000 to support school group visits, you'd create a grant fund of $10,000. Any time you apply the funds to a field trip reservation, you'll enter the account number for the grant. The list of transactions for the grant account contains information you may need to report results to the sponsor.

**NOTE**: Grant funds can only be applied by administrators.

## Can My Organization Use These Features?

If your organization does not already use a gift card processor, you can enable gift cards, loyalty accounts and/or grants. Contact our Support team at Support@doubleknot.com and let them know that you'd like to enable the feature.

If your organization is using another solution and would like to switch to Doubleknot's gift cards, contact support@doubleknot.com.

## How Do I Enable These Features?

The Doubleknot support team will enable gift cards, loyalty accounts and/or grants at your request. You can choose to enable one, two or all three of these features. If you want to allow customers to buy gift cards online or at Sales Station, you'll need to enable Doubleknot gift card processing and configure gift cards as a store product in Store Management. Instructions are located in Creating Gift Cards for Sale, later in this document.

| To do this: | Ask Support to enable this: |
|---|---|
| Allow administrators to create and issue gift cards | Doubleknot gift card processing |
| Create and manage loyalty accounts | Doubleknot loyalty accounts |
| Create and manage grant accounts | Doubleknot grant accounts |
| Sell gift cards to constituents online or at Sales Station | Doubleknot gift card processing.<br>You'll also need to create gift cards as a store product. |

## What's the Difference Between Administrator-Issued Gift Cards and Gift Cards that Customers Buy?

When an administrator issues a gift card using the steps in Gift Card Administration, the gift card can be created for any amount. However, this kind of gift card doesn't automatically send an email that contains information about the gift card. The administrator must provide the gift card information to the recipient. When an administrator issues a gift card, they can assign any alphanumeric name to the gift card account.

If your organization sells gift cards directly to customers online and/or at Sales Station, you'll create a store product for each denomination you're selling. For example, if you plan to sell $10 gift cards, you must create a store product for a $10 gift card. If you plan to sell $10, $25 and $100 gift cards, you must create three separate store products (one for each amount). When a customer purchases a gift card, their receipt contains a link to download the gift card. Complete information on this topic is located in Creating Gift Cards for Sale, later in this document. Gift cards that are sold directly to customers use system-generated account numbers.

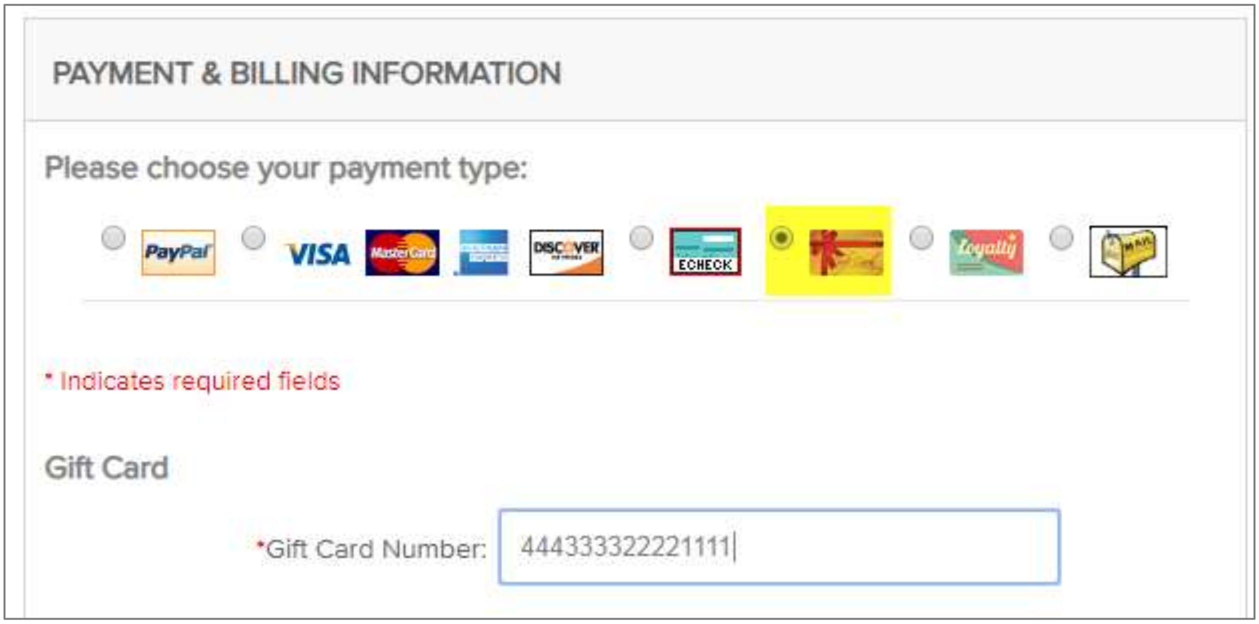
**NOTE**: Even if you plan to offer gift cards for sale, be sure to read Gift Card Administration for information about viewing gift card transactions and reloading gift cards.

### How Purchasers Use Gift Cards and Loyalty Accounts

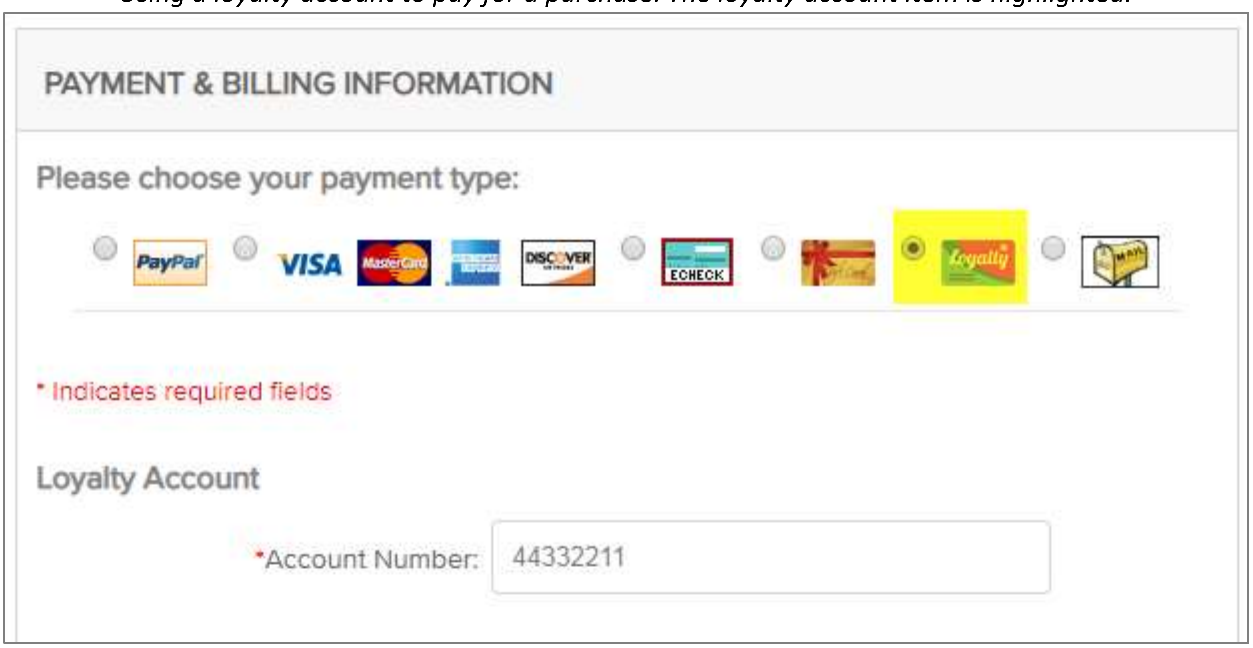
To pay online with a gift card or loyalty account, the purchaser selects the correct payment type and enters the gift card or loyalty account number.

- If the gift card or loyalty account is valid and has sufficient funds, the purchase will be completed.
- If the gift card or loyalty account is not valid, an error message is displayed.
- If the gift card or loyalty account doesn't contain sufficient funds to complete the purchase, the amount of the gift card or loyalty account will be applied to the balance and the purchaser will be asked to use another payment type to pay the balance.

*Using a gift card to pay for a purchase online. The gift card item is highlighted.*




*Using a loyalty account to pay for a purchase. The loyalty account item is highlighted.*

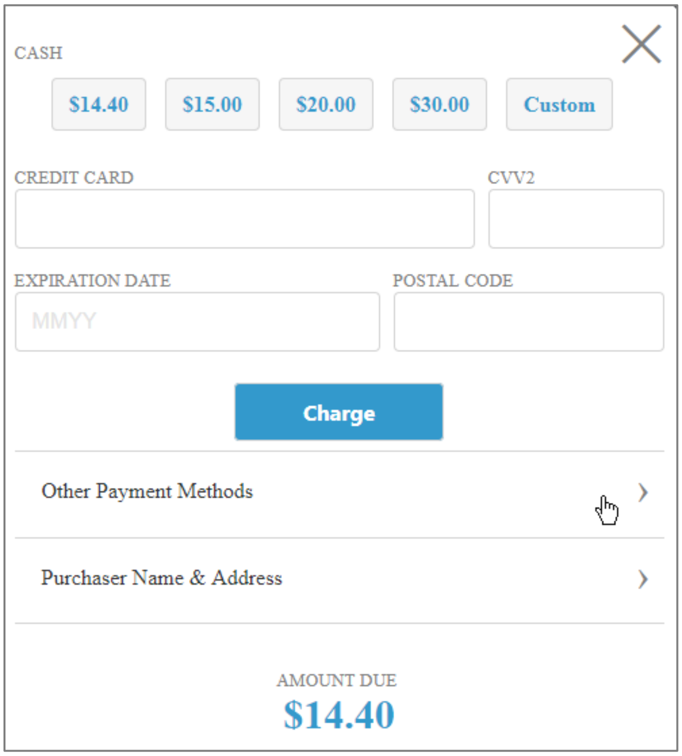


## Accepting Gift Cards in Sales Station

If a customer presents their gift card number to use for an in-person purchase at Sales Station, cashiers can follow these steps to apply the gift card to the purchase.

1. On the Sales Station payment screen, tap **Other Payment Methods**. The Other Payment Methods screen will be displayed.

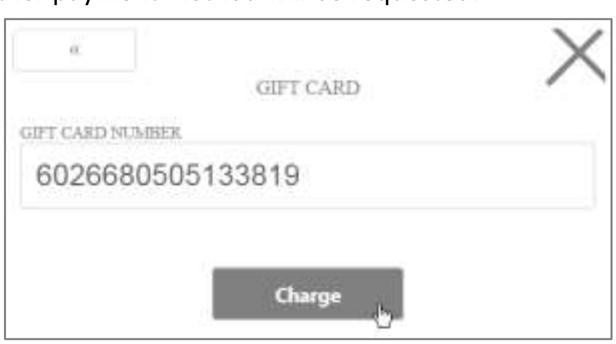
*Tap Other Payment Methods*




2. Tap **Gift Card**. The Gift Card screen will be displayed.

*Tap Gift Card*


3. In the GIFT CARD NUMBER field, enter the gift card number.
4. Tap **Charge**. Gift card funds will be applied to the purchase. If the gift card balance was more than the balance due, the transaction will be completed and the receipt screen will be displayed. If the gift card balance was less than the balance due, another payment method will be requested.



# Getting Started

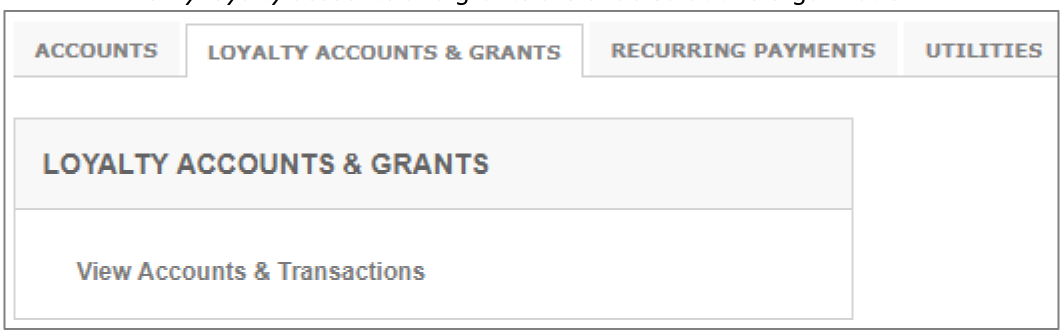
**<u>You must contact Doubleknot's Support team at Support@doubleknot.com to request these features.</u>** After the Support team lets you know that the requested features are enabled, log in to Doubleknot and follow these steps:

1. In the Administer panel at the left, click **Financial Accounts.** Your organization's account page will be displayed.
   - If your organization enabled all three items, there will be a tab called GIFT CARDS, LOYALTY ACCOUNTS AND GRANTS.

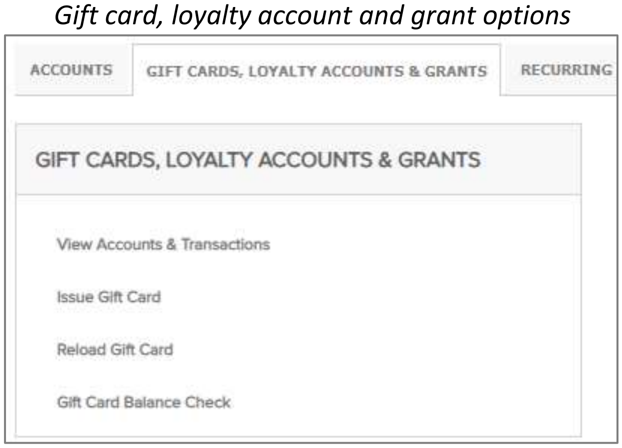
     *Gift cards, loyalty accounts and grants are enabled at this organization*

     
     
   - If your organization enabled one item or two items, the tab will only contain the item(s) you enabled.

     *Only loyalty accounts and grants are enabled at this organization*

     
     
2. Click your organization's version of the **Gift Cards, Loyalty Accounts and Grants** tab. The options for this feature will be displayed.

   *Gift card, loyalty account and grant options*

   
   
3. Follow the instructions in the rest of this document for the feature you want to use.

# Gift Card Administration

This section contains information and procedures for gift card administration in Financial Accounts. Instructions for creating gift cards that customers can buy are located in Creating Gift Cards for Sale.

### Issue a Gift Card in Any Amount

To issue a new online gift card, follow these steps:

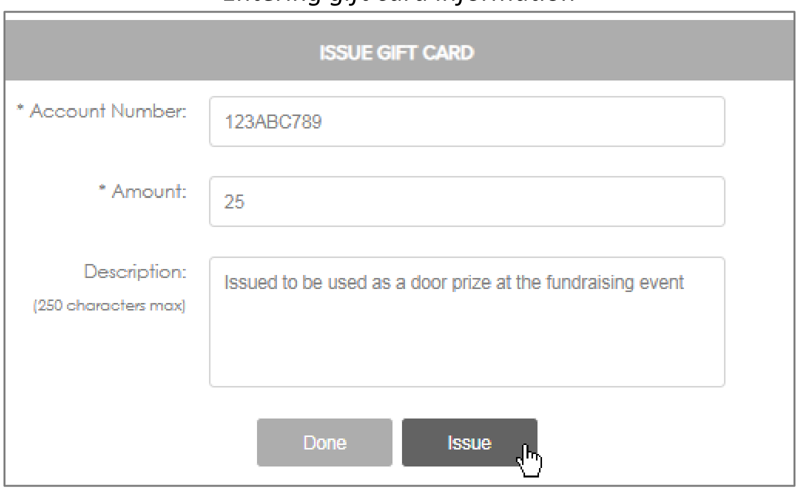
1. Click **Issue Gift Card**. The Issue Gift Card page will be displayed.
2. Enter gift card information as described below:

| Field | Required or Optional | What to Enter |
|---|---|---|
| Account Number | Required | A unique string of numbers to use as the gift card number. Do not enter any spaces or punctuation. |
| Amount | Required | The amount of the gift card. You may enter numbers and a decimal. No other characters will be accepted. |
| Description | Optional | Up to 250 characters that describe the gift card. |

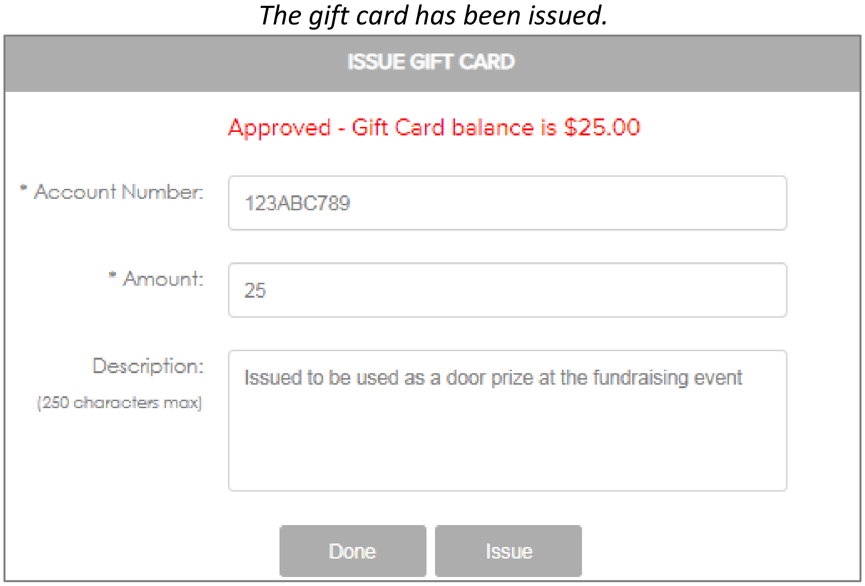
3. Click **Issue**. A message confirming the creation of the gift card will be displayed.
4. Choose one of the following:

- To leave the page, click **Done**.
- To issue another gift card, follow steps 2-3 again.

*Entering gift card information*




*The gift card has been issued.*

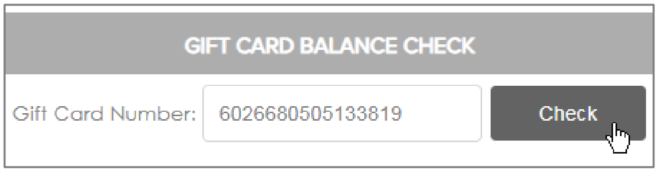


## Check a Gift Card Balance

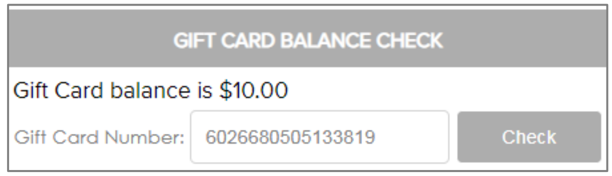
To check a gift card balance, follow these steps:

1. Click **Gift Card Balance Check**. The Gift Card Balance Check page will be displayed.
2. In the Gift Card Number field, enter the gift card number
3. Click **Check**. The gift card's current balance will be displayed.
4. Choose one of the following:
   - To leave the page, click **Done**.
   - To check the balance of another gift card, follow steps 2-3 again.

*Enter the gift card number.*




*The current balance is displayed.*

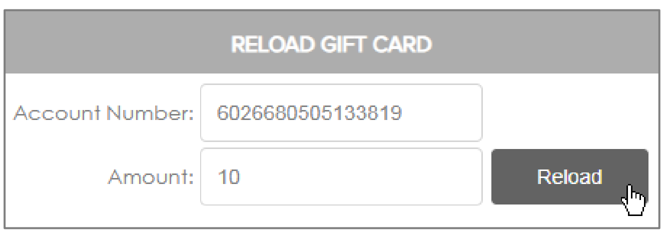



## Reload a Gift Card

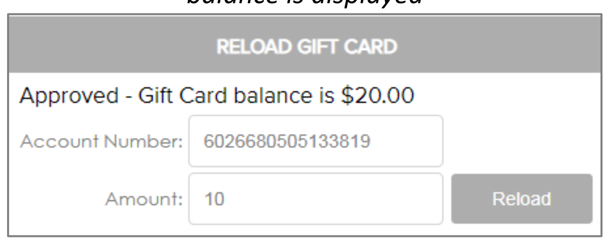
To reload (add more funds to) an existing online gift card, follow these steps:

1. Click **Reload Gift Card**. The Reload Gift Card page will be displayed.
2. In the Account Number field, enter the account number for the gift card you're reloading.
3. In the Amount field, enter the amount to add to the gift card.
4. Click **Reload**. A message that confirms the new gift card balance will be displayed.

*Entering information to reload gift card*




*The funds are added to the gift card and the new balance is displayed*

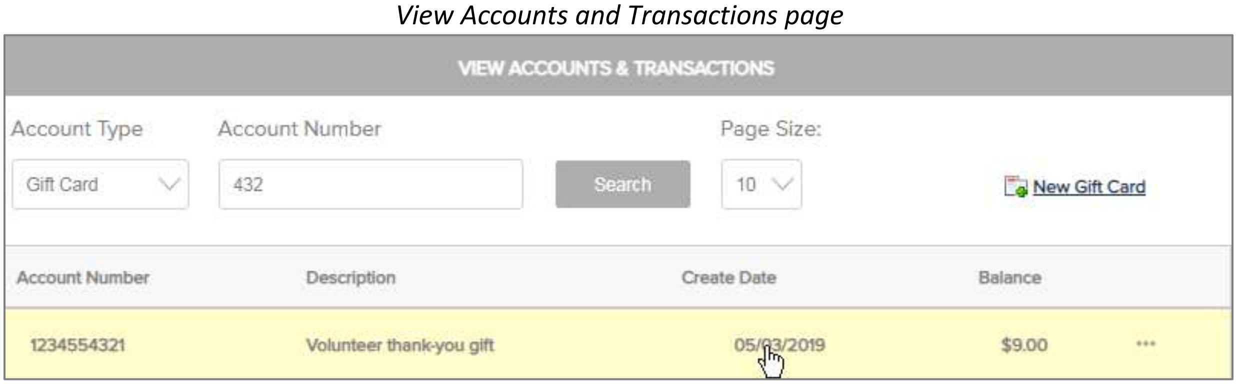



## View Gift Card Transactions

To view gift card transactions and details, follow these steps:

1. Click **View Accounts and Transactions**. The View Accounts and Transactions page will be displayed.
2. In the Account Type menu, select **Gift Card**. All issued gift cards will be displayed.
3. Locate the gift card account that you want to view. To locate a gift card by number:
   - In the Account Number field, enter some or all of the gift card account number.
   - Click **Search**. Gift cards that match the number you entered will be displayed.

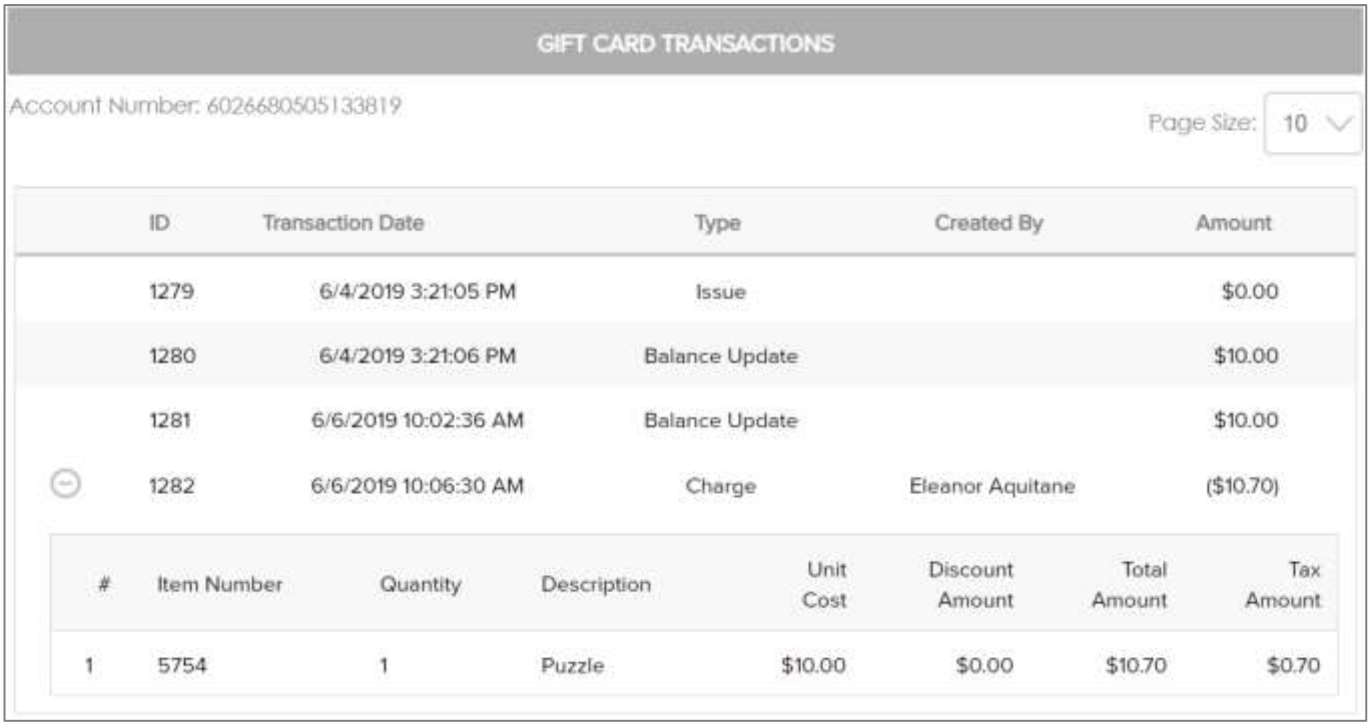
*View Accounts and Transactions page*



4. To view all transactions associated with a gift card, you can c
   - Click the row.
     OR
   - Click the three-dot menu at the right side of the row, and select **Details**. All transactions for the selected account will be displayed.

   **NOTE**: The menu also contains shortcuts to edit the account description and to reload the gift card.
5. To view the details of a purchase, click the **+** icon at the left. To hide the details, click the **–** icon.

*Transactions for a gift card account. Purchase details are displayed.*



# Creating Gift Cards for Sale

When the Support team enables Doubleknot gift card processing for your organization, they will:

- Configure a supplier
- Upload and configure a gift card template. The gift card template determines how gift card purchase information is displayed.
- Create one gift card as a store product. This is necessary to ensure that the right information is displayed on the gift card.

### How Do Customers Receive Gift Cards?

Similar to a ticket, gift cards are a downloadable document. The purchaser's email receipt will contain a link to download the gift card.

*Example of a link to a gift card on a Doubleknot receipt*

**City Museum**
P.O Box 353010
San Jose CA 98194
US

**Receipt**

**Billing Details:**

**Order Number:** 24671
**Order Date:** 6/4/2019

| Description | | Quantity | Amount |
|---|---|---|---|
| $10 Gift Card for City Art Museum **17812** | *$10.00* | 1 | $10.00 |
| | | **Subtotal** | **$10.00** |
| | | **Tax** | $1.20 |
| | | **Total** | **$11.20** |
| | | | **($11.20)** |
| | | **Balance** | **$0.00** |

**Gift Card (click on link to download):**
$10 Gift Card for City Art Museum (x3819) Download Gift Card To Print

*When the purchaser or recipient clicks the link, the gift card is displayed:*


### Create Gift Card(s) as Store Products

To create a new gift card, follow these steps:

1. In the Administer panel, click **Store Management**.
2. In the Products panel, click **Manage Products**.
3. Click New Product.
4. In the Description field, enter a name for the product (e.g., **$25 Gift Card**).
5. In the Details field, enter any desired details.
6. In the Price field, enter the dollar value of the gift card you're creating.
7. In the Stock field, enter a relatively high number like 10,000.

   **NOTE:** Store products require a non-zero number in the Stock field. Even though these gift cards aren't physical products stored in inventory, you must assign an amount of stock. Every time someone buys a gift card, the stock is decreased by one. If you enter a large number, you don't have to worry about the gift card running out of stock.

8. In the Supplier menu, select the supplier that Support created (e.g., **Doubleknot Gift Cards**).
9. In the Category 1 menu, assign the gift card product to a category. If you want the card to be included in additional categories, select the categories in the Category 2 and Category 3 menus.
10. Enter any other information.
11. Click **Save**. The gift card product will be created.

### Assign Gift Card Product(s) to the Gift Card Template

To assign the gift card to the template, follow these steps:

1. In the Administer panel, click **Template Management**.
2. Select the template you uploaded for gift cards.
3. Click **Assign Templates to Items**.
4. Click **OK**. The page to assign items to templates is displayed.
5. In the Select a Template menu, select the gift card template you created.
6. In the Available Gift Cards column, select the gift card(s) you created as products.
7. Click **Add**. The selected gift cards will be assigned to use the template.
8. Click **Done**. The Template Management page will be displayed.

# Customizing the Gift Card Template

When the Doubleknot Support team enables gift cards for your organization, they will upload a generic gift card template. You can customize the gift card template by adding images and additional text. You can also change the style

### Professional Services are Available

If your team would rather have Doubleknot customize and upload your gift card template for you, you can purchase a block of professional services hours from Doubleknot's Support team. Doubleknot will customize the template to your specifications and ensure that it works and functions exactly the way you want. For more information about purchasing professional services hours, contact Support at Support@doubleknot.com or 408-971-9120 x2.

### Before You Start

The gift card template is in the Microsoft Word format. You must have Microsoft Word installed on your computer and be moderately familiar with adding graphics and formatting in Microsoft Word.

### Understanding the Gift Card Template

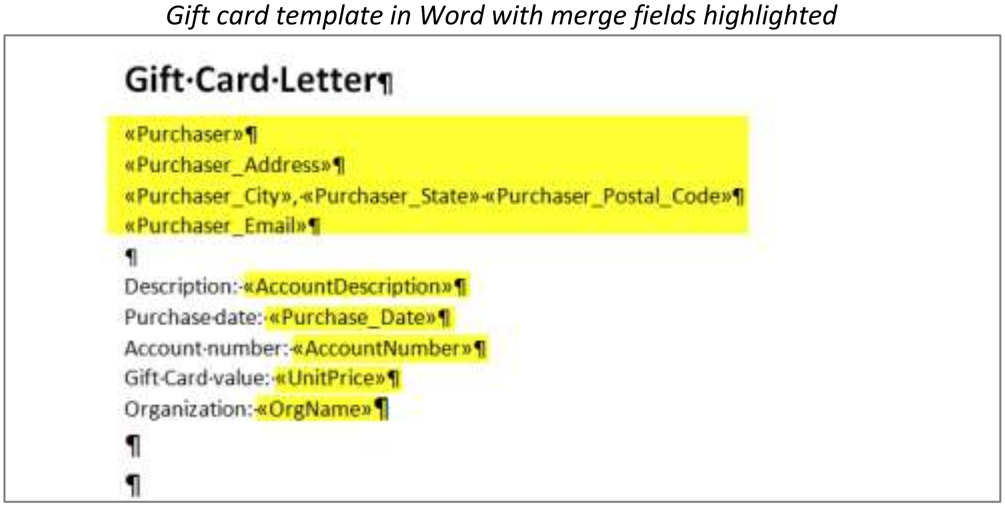
**NOTE**: We strongly recommend displaying Word's formatting symbols to ensure that you don't accidentally change or remove important formatting information.

*How to display Word's formatting symbols*


When you open the template in Word and display formatting symbols, the document will look something like this (without the highlighting).

> **IMPORTANT**: The items highlighted in the image below are mail merge fields. **Do not edit the text or the brackets of these fields**. If you do, the mail merge function may fail and customers will receive incomplete or incorrect information about the gift card.

*Gift card template in Word with merge fields highlighted*




### What Can I Change On the Template?

Using Word, you can:

- Add or change text (as long as the text isn't inside the brackets of a mail merge field)
- Add graphics
- Change fonts and styling
- Change margins

**WARNING**: You cannot add a header or a footer to the template.

## Example of a Customized Gift Card Template

In the following image, the gift card template has been customized:

- A logo is added to the top of the page
- The headline text before the gift card information is changed
- The text “Account number” is changed to “Gift Card Number”
- All the words in the information section are capitalized
- A thank-you message, instructions to use the gift card, and contact information are added at the bottom
- All of the fonts have been changed

**NOTE**: Despite the changes, the exact text and brackets of the mail merge fields have not been changed.

*Modified template*

CITY ART MUSEUM

**Here’s Your Gift Card!**

«Purchaser»
«Purchaser_Address»
«Purchaser_City», «Purchaser_State» «Purchaser_Postal_Code»
«Purchaser_Email»

**Description**: «AccountDescription»
**Purchase Date**: «Purchase_Date»
**Gift Card Number**: «AccountNumber»
**Gift Card Value**: «UnitPrice»
**Organization**: «OrgName»

**Thank you for supporting our programs!**

You can use this gift card online or at the museum.

To use the gift card at the museum, display this document to the cashier.

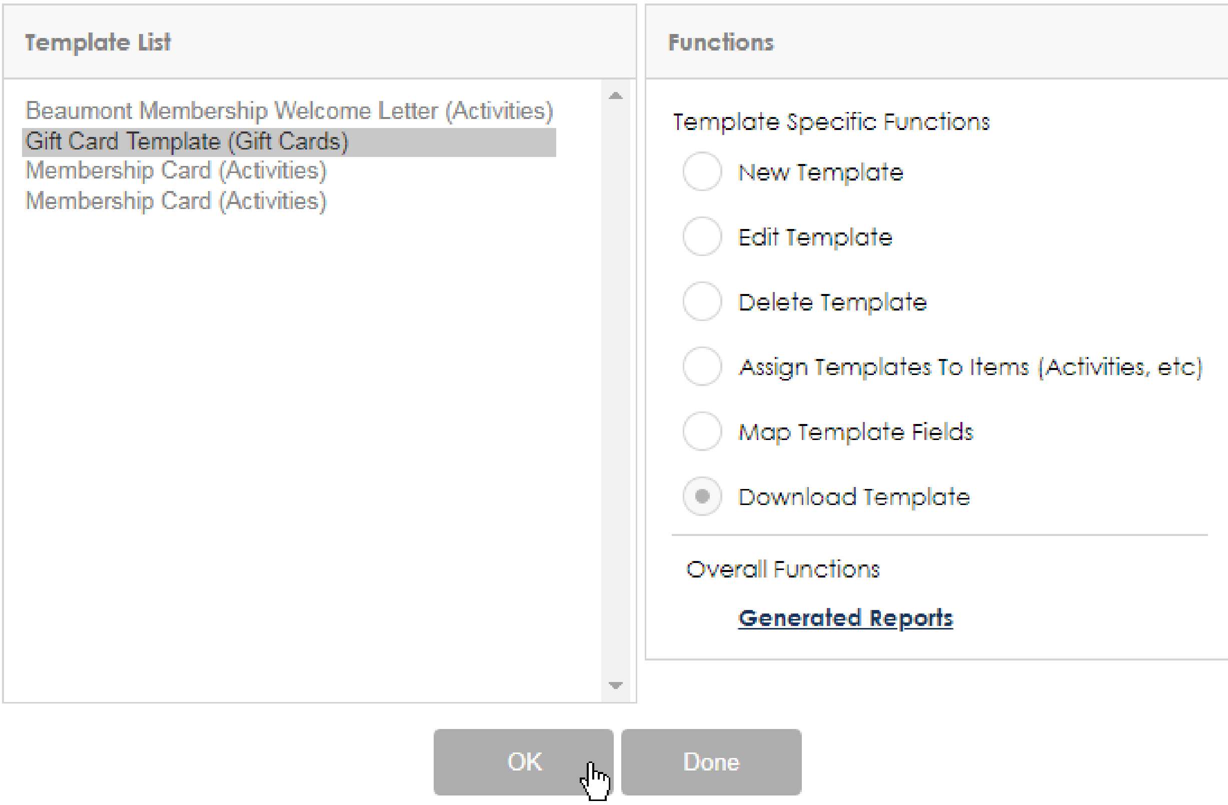
To use the gift card online, select Gift Card as the payment type. In the image below, the Gift Card option is highlighted. Then, enter the gift card number in the field.

## Download the Gift Card Template

To download the gift card template, follow these steps in Doubleknot:

1. In the ADMINISTER panel, click **Template Management**. The TEMPLATE LIBRARY page is displayed.
2. In the TEMPLATE LIST panel at the left, select the gift card template that Support added for your organization.
3. In the FUNCTIONS panel at the right, select **Download Template**.
4. Click **OK**. The template will be downloaded to your computer.

*Downloading the gift card template*




## Make a Backup Copy of the Gift Card Template

> **IMPORTANT**: **Be sure to make a backup copy of the unchanged gift card template that you downloaded**. If there are problems with your modifications to the template, you may need to reload the original template.

## Edit and Save the Gift Card Template

Use Microsoft Word to modify the template. The following actions are supported:

- Add or change text (as long as the text isn't inside the brackets of a mail merge field)
- Add graphics
- Change fonts and styling
- Change margins

### WARNINGS

- **Do not change or remove the mail merge fields including the text and the brackets.** The modified template must have all of the same mail merge fields as the original.
- **Do not add anything to the Word document's header or footer.**

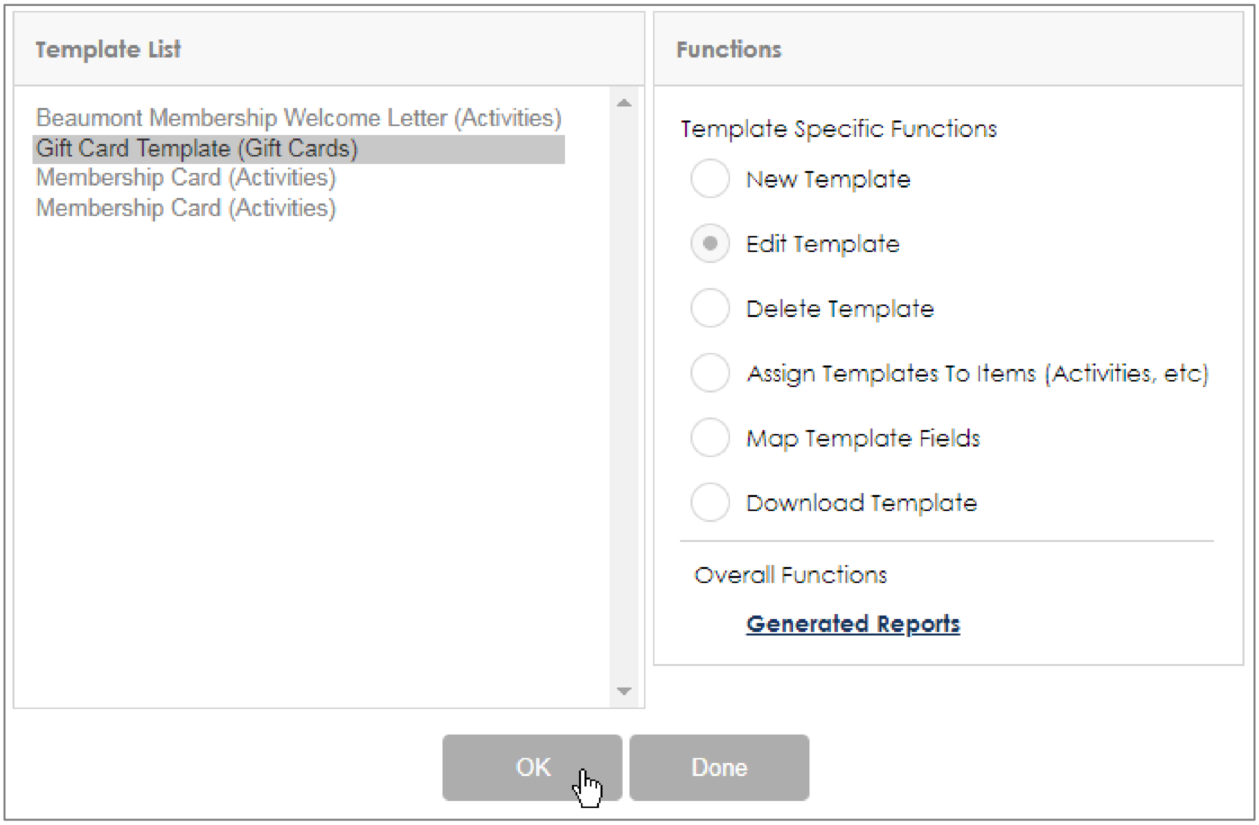
When you're done with your changes, save the updated template and assign a name that's easy for you to recognize.

### Replace the Template

To upload and use the modified template, follow these steps in Template Management:

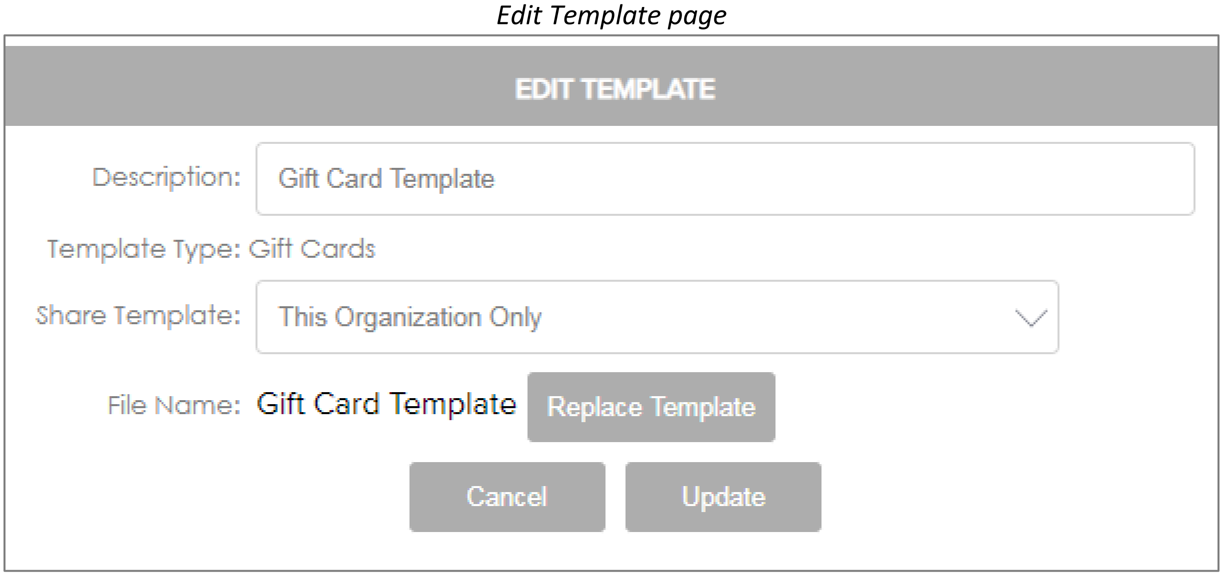
1. In the TEMPLATE LIST panel at the left, select the gift card template that Support added for your organization.
2. In the FUNCTIONS panel at the right, select **Edit Template**.

*Preparing to upload the modified gift card template*




3. Click **OK**. The EDIT TEMPLATE page will be displayed. A red warning message may be displayed at the bottom of the page. As long as you didn't change the mail merge fields, you can safely ignore the warning.

*Edit Template page*



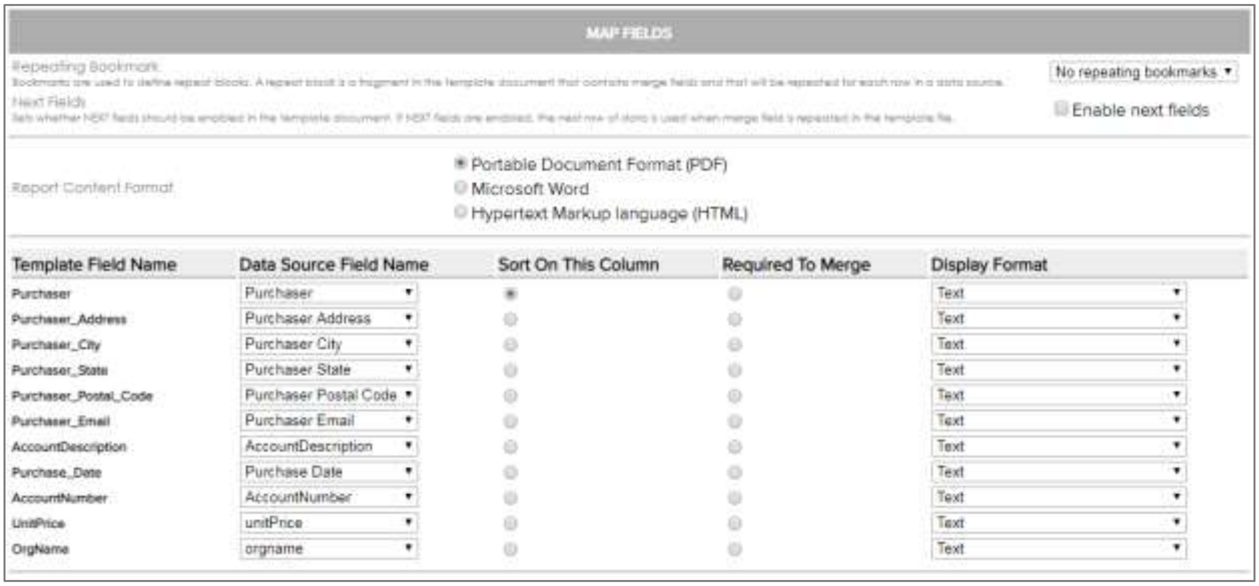

4. Click **Replace Template**. A page to upload the modified template is displayed.
5. Follow the on-screen prompts to locate, select and upload the template that you modified. The EDIT TEMPLATE page will be displayed again.
6. Click **Update**. The updated gift card template will replace the original generic gift card template.
7. To leave the page, click **Cancel**. The TEMPLATE LIBRARY will be displayed.

## Confirm Field Mapping for the Template

When Doubleknot Support configured the original template, they mapped all the merge fields to display specific information about the order. If you replaced the template correctly, the field mapping will not have changed. To check the field mapping, follow these steps in Template Management.

1. In the TEMPLATE LIST panel, select **Gift Card Template**.
2. In the FUNCTIONS panel, select **Map Template Fields**.
3. Click **OK**. The MAP FIELDS page will be displayed. If the field mapping is still correct, the column at the right will look similar to the following:

*When you replace the default gift card template with a custom template, the Map Fields page will look something like this. In the column on the left, note that all the mail merge fields in the Word document are matched to a date source.*



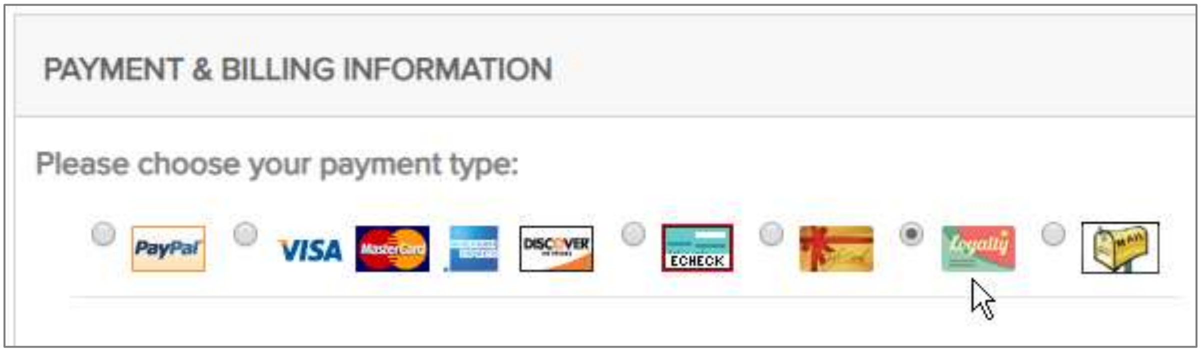
# Loyalty Accounts

## Understanding Loyalty Accounts

Loyalty accounts and gift cards are created and managed the same way. However, a loyalty account can't be purchased by a customer, and a document containing loyalty account information isn't automatically created.

Similar to gift cards, your constituents can use loyalty points on the payments page for any purchase.

*To pay with a loyalty account, the customer selects **Loyalty***

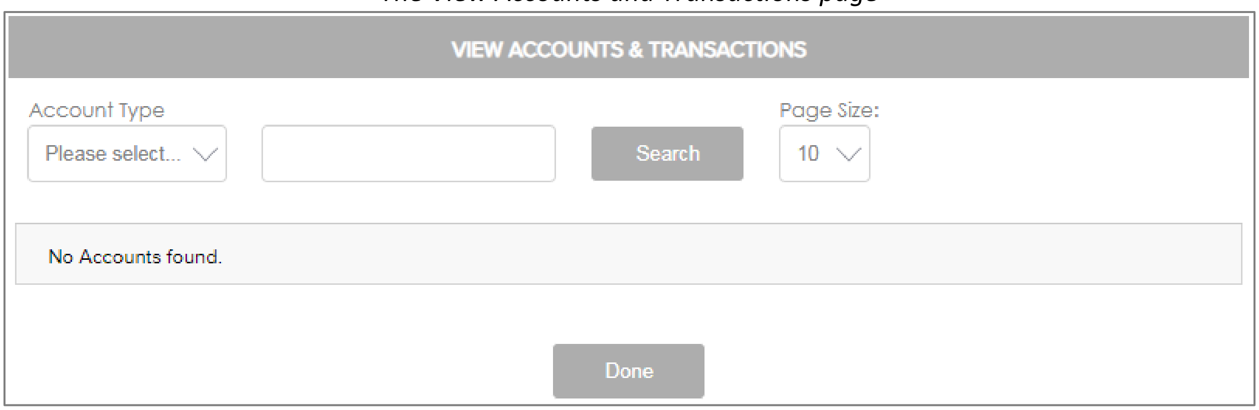



## Getting Started

To begin issuing and managing loyalty accounts, follow this step:

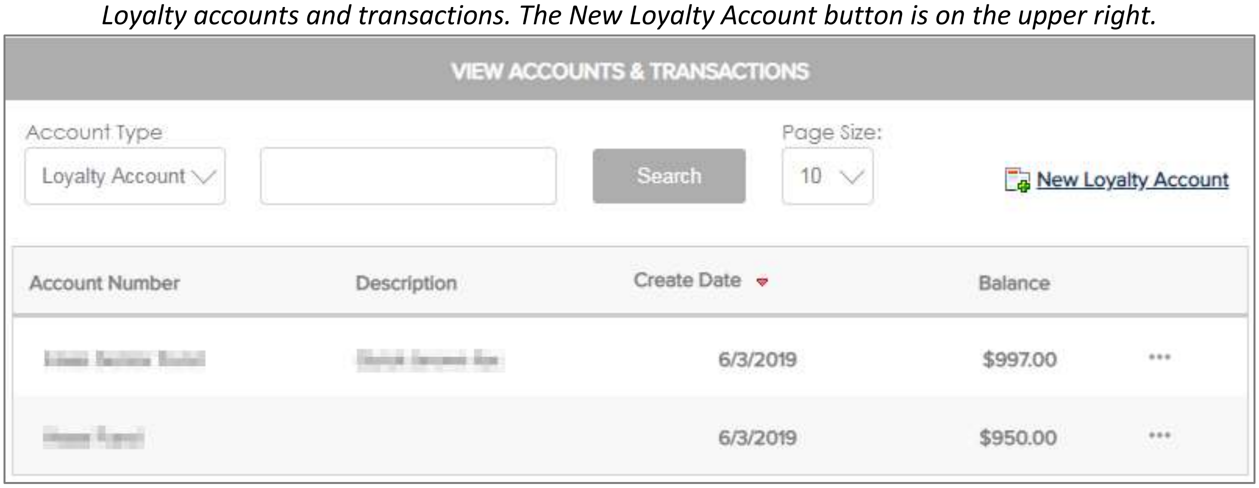
1. Click **View Accounts & Transactions**. The VIEW ACCOUNTS AND TRANSACTIONS page is displayed.

*The View Accounts and Transactions page*




2. In the ACCOUNT TYPE menu, select **Loyalty Account**. The page will update to show any existing loyalty accounts and the NEW LOYALTY ACCOUNT button will be displayed.

*Loyalty accounts and transactions. The New Loyalty Account button is on the upper right.*




## Create a Loyalty Account

To create a new loyalty account, follow these steps:

1. Click the **New Loyalty Account** button. The CREATE LOYALTY ACCOUNT page will be displayed.

*Create Loyalty Account page*


2. Enter loyalty account information as described below:

| Field | Required or Optional | What to Enter |
|---|---|---|
| ACCOUNT NUMBER | Required | A unique string of alphanumeric characters numbers to use as the account number. |
| AMOUNT | Required | The amount of funds in the loyalty account. You may enter numbers and a decimal. No other characters will be accepted. |
| DESCRIPTION | Optional | Up to 250 characters that describe this loyalty account. |

3. Click **Issue**. A message confirming that the loyalty account was created will be displayed.
4. Choose one of the following:
    - To leave the page, click **Done**.
    - To create another loyalty account, follow steps 2-3 again.

## View Loyalty Account Balances

On the VIEW ACCOUNTS AND TRANSACTIONS page, the balance of every loyalty account, grant and gift card is displayed. To view information about an account, follow these steps:

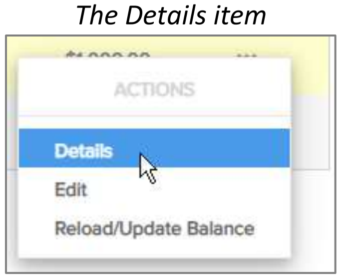
1. In the ACCOUNT TYPE menu, select **Loyalty Account**. The list will display all accounts of that type including the account number, description, creation date and current balance.
    - To view more accounts on a single page, click the **Page Size** menu and select another number.
    - To sort the displayed accounts by creation date, click the red triangle next to to CREATE DATE.
    - To search for an account by account number or description, enter text in the search field and click **Search**. Only accounts that contain the text will be displayed.

## View Loyalty Account Transactions

To view all transactions associated with a loyalty account, follow these steps:

1. Click the three dots at the end of the row. The ACTIONS menu will be displayed.

*The Details item*




2. Click **Details**. A complete list of transactions for the account is displayed.
3. A**+** sign will be displayed at the left of every transaction that reflects use of the account to pay for a Doubleknot item. Click the **+** sign to display details of the transaction.
4. To leave the page, click **Done**.

### Edit the Loyalty Account Description

To edit the account description, follow these steps:

1. Click the three dots at the end of the row. The ACTIONS menu will be displayed.
2. Click **Edit**. A page to edit the account is displayed.
3. Add, remove or edit information in the DESCRIPTION field.
4. To save your changes and leave the page, click **Save**.

### Update Funds in the Loyalty Account

To add or remove funds in a loyalty account, follow these steps:

1. Click the three dots at the end of the row. The ACTIONS menu will be displayed.
2. Click **Reload/Update Balance**. A page to edit the balance is displayed.
3. In the AMOUNT field, enter the amount that's being added to the account.
4. Click **Update**. A status message that shows the new balance will be displayed.
5. To leave your changes and leave the page, click **Done**.

# Grant Accounts and Administration

## Understanding Grant Accounts

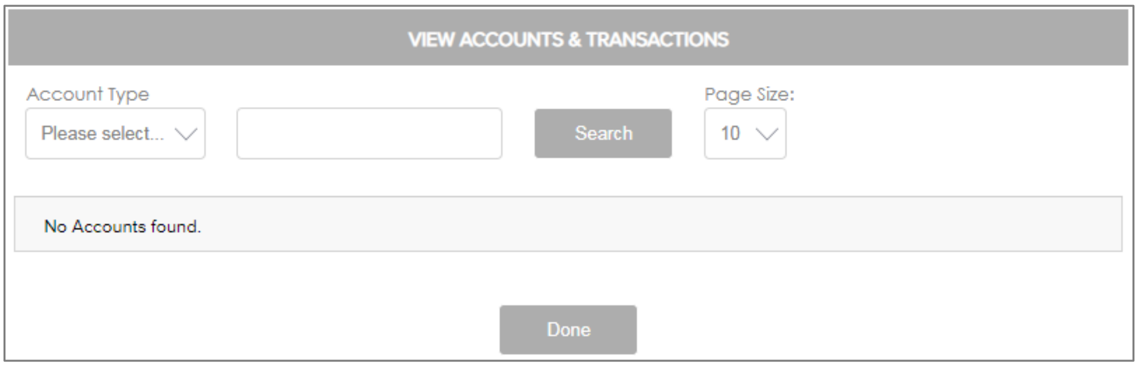
Grant accounts can only be used by administrators. You can apply funds from a grant account to a customer's registration or reservation. For example, you could create a grant account called "Camp Scholarships" and apply the funds to all or part of a summer camp registration. If a corporate sponsor provides directed funds that must be used for specific purposes, like funding field trips for area schools, you can create a grant account for those funds and use the account to pay some or all of the balance due for eligible field trip reservations.

## Getting Started

To begin issuing and managing grant accounts, follow this step:

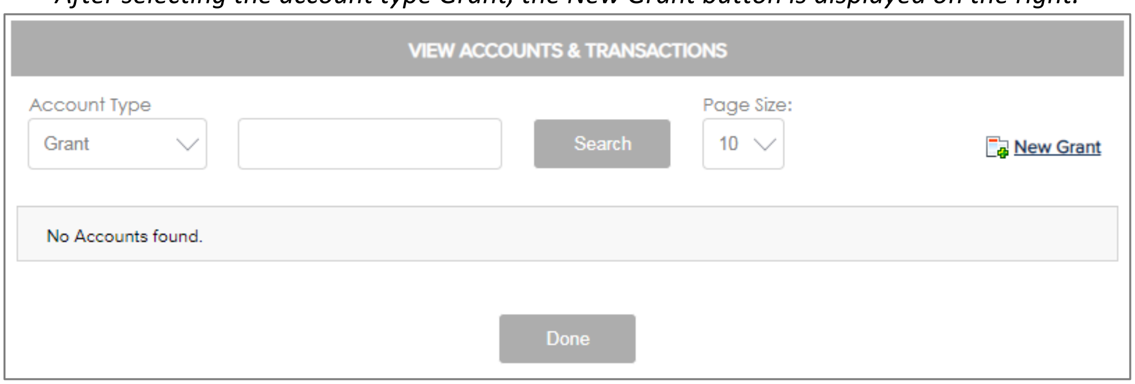
1. Click **View Accounts & Transactions**. The VIEW ACCOUNTS AND TRANSACTIONS page is displayed.

*The View Accounts and Transactions page*




2. In the ACCOUNT TYPE menu, select **Grant**. The page will update to show any existing grants and the NEW GRANT button will be displayed.

*After selecting the account type Grant, the New Grant button is displayed on the right.*




## Create a Grant Account

To create a new grant, follow these steps:

1. Click **New Grant**. The ENTER GRANT page will be displayed.

*Enter Grant page*

2. Enter grant account information as described below:

| Field | Required or Optional | What to Enter |
|---|---|---|
| Account Number | Required | A unique string of alphanumeric characters to use as the account number. |
| Amount | Required | The amount of funds in the grant account. You may enter numbers and a decimal. No other characters will be accepted. |
| Description | Optional | Up to 250 characters that describe this grant account. |

3. Click **Issue**. A message confirming that the grant account was created will be displayed.
4. Choose one of the following:
   - To leave the page, click **Done**.
   - To issue another gift card, follow steps 2-3 again.

### Viewing Loyalty Account and Grant Balances

On the View Accounts and Transactions page, the balance of every loyalty account, grant and gift card is displayed. To view information about a grant account, follow these steps:

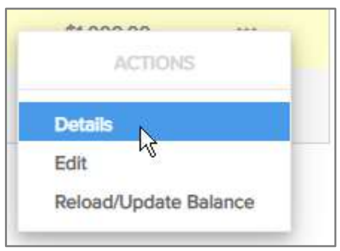
1. In the Account Type menu, select **Grant**. The list will display all grants, including the account number, description, creation date and current balance.
   - To view more grant accounts on a single page, click the **Page Size** menu and select another number.
   - To sort the displayed grant accounts by creation date, click the red triangle next to to Create Date.
   - To search for a grant account by account number or description, enter text in the search field and click **Search**. Only accounts that contain the text will be displayed.

### Viewing Account Transactions

To view all transactions associated with a grant account, follow these steps:

1. Click the three dots at the end of the row. The Actions menu will be displayed.

*The Details item*




2. Click **Details**. A complete list of transactions for the grant account will be displayed.
3. A**+** sign will be displayed at the left of every transaction that reflects use of the account to pay for a Doubleknot item. Click the **+** sign to display details of the transaction.
4. To leave the page, click **Done**.

### Editing the Grant Account Description

To edit the grant account description, follow these steps:

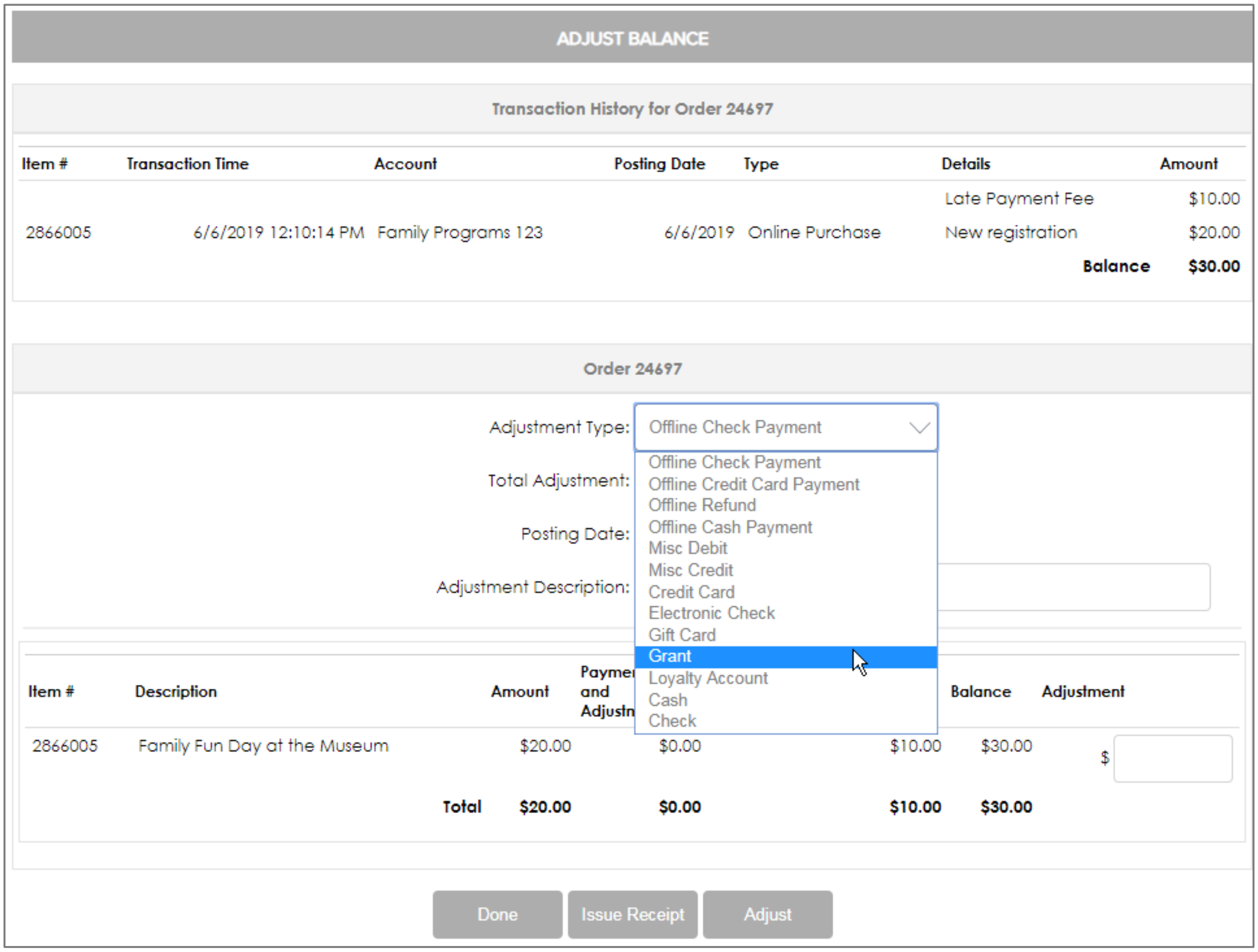
1. Click the three dots at the end of the row. The Actions menu will be displayed.
2. Click **Edit**. A page to edit the account is displayed.
3. Add, remove or edit information in the Description field.
4. To save your changes and leave the page, click **Save**.

### Applying Grant Accounts Funds to a Purchase

Administrators apply funds from grant accounts on the Adjust Balance page for a purchase. To apply the funds, follow these steps:

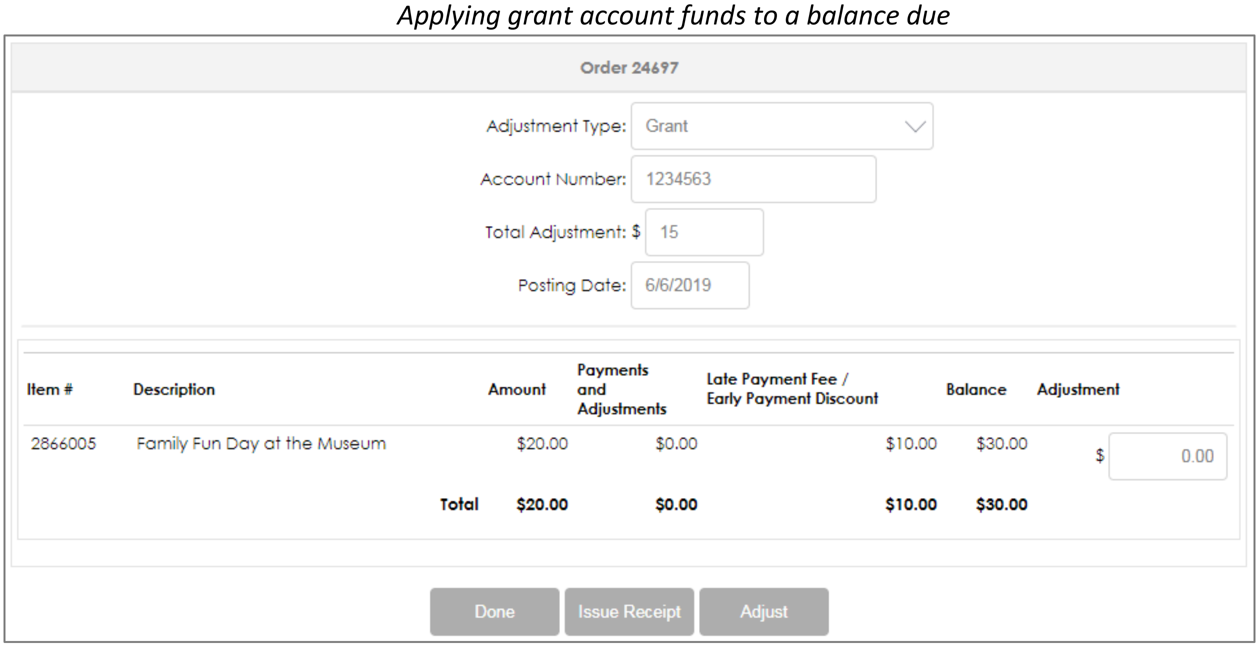
1. Locate and edit the purchase.
2. On the payment page, select the offline payment option.
3. Click **Complete Order**. The Adjust Balance page is displayed.
4. In the Adjustment Type menu, select **Grant**. The page will update to show fields for applying grant funds.

*In the* Adjustment Type *menu, select* ***Grant***




5. In the Account Number field, enter the exact grant account number.
6. In the Total Adjustment field, enter the dollar amount being applied from the grant account.
7. In the Adjustment field for the purchase, enter the dollar amount.
8. Click **Adjust**. A confirmation dialog box will be displayed.
9. Click **OK**. The balance will be updated and the new balance will be displayed at the bottom.
10. To issue a new receipt, click **Issue Receipt**. Or, to leave the page, click **Done**.

*Applying grant account funds to a balance due*



## Updating Funds in the Grant Account

To add or remove funds in a grant account, follow these steps:

1. Click the three dots at the end of the row. The ACTIONS menu will be displayed.
2. Click **Reload/Update Balance**. A page to edit the balance is displayed.
3. In the AMOUNT field, enter the dollar amount that's being added to the grant account.
4. Click **Update**. A message that confirms the new balance in the grant account will be displayed.