Customer Engagement

# User Guide

# Global Payments
# Gift Card Program
# application

Attract new customers and retain existing ones with
**Global Payments Gift Card Program** – available on
the **Global Payments Terminal**.



## globalpayments

Innovation that delivers.

# Table of contents

# Introduction

This is a complete user guide for your **Global Payments Gift Card Program application** (referred to as the **Gift app**), including installation instructions, functional specifications, customization options, and application-specific features to help you create a customized gifting experience for your customers.

# Get started

## Whitelist Gift app host URL

To process the gift card transactions, copy the **Gift app host URL** and whitelist it on your network: **https://api2.chockstone.net**

## Configure Wi-Fi connection

To connect the device to Wi-Fi, follow these steps:

- Tap the Android home icon **[O]** at the bottom of your screen

- Tap the WLAN icon **[⚙]**

- Toggle to **[On]** to display available networks

- Tap the SSID name of the Wi-Fi network from the list

- Enter the Wi-Fi Password, and then tap **[CONNECT].**

## Check connection status

To ensure your device is properly connected to the Internet, check if the Wi-Fi icon indicator is present in the top right corner of your terminal.



## Accessing the Gift app

Launch the **Payments application** on your terminal and you will be directed to the Payments application main menu. Tap the **[🎁GIFT]** option on the main menu and you will be directed to the **Gift app** menu, as illustrated below.
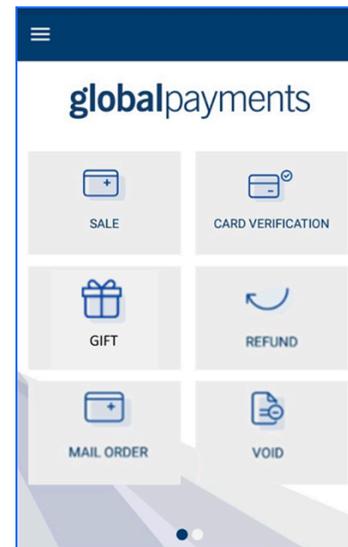


**Payments application** main menu



**Gift app** menu

# Admin functions

To access the **admin menu** of the Gift app, tap **[ 🎁 GIFT]** on the Payments application, and then tap the ☰ icon located in the top left corner. Under the Gift app admin menu, you can access reports, reprints, admin default settings, and more.



Gift app **main menu**



Gift app **admin menu**

# Reports

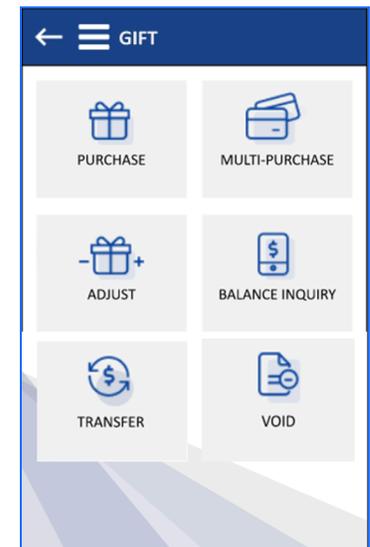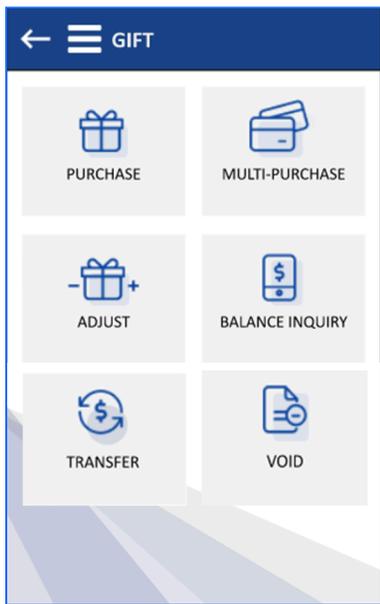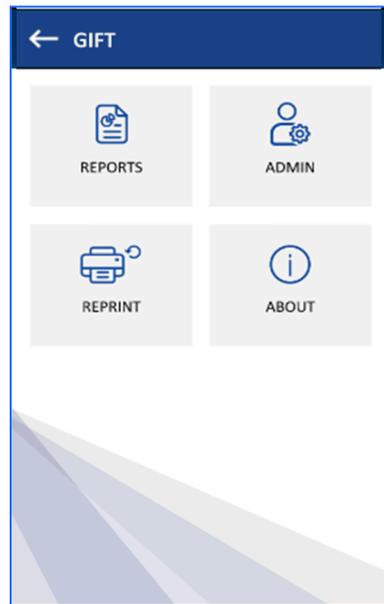Use the reports function to generate real-time reports. To get started, follow the steps below:



1. Tap ☰ on the Gift app main menu to open the admin menu

2. Tap **[REPORTS]**

3. The terminal displays two batch types; select **[CURRENT]** or **[PREVIOUS]**.

> **NOTE:**
>
> The **[CURRENT]** batch type will include all gift transactions that happened after the last End-of-Day (EOD) processing on your terminal. The **[PREVIOUS]** batch type will provide you with a list of all previous reports. The reports will go as far back as 14 days. If **[PREVIOUS]** is selected, the Gift app displays an additional report selection screen.

4. Terminal displays two (2) types of report options:

    a. **[SUMMARY]** – A brief summary of the EOD gift report

    b. **[SUMMARY + DETAIL]** – A full summary of the EOD gift report, including the amount and timestamp for each transaction

5. If the clerk function is enabled, the terminal displays two (2) types of report options:

    a. **[BY CLERK]** – Prints a report for one clerk. To proceed, enter the **clerk #** and tap **[ ✔ ]**

    b. **[ALL CLERKS]** – Prints a report including all clerks

6. Once the desired report type is selected, the terminal will print the report and return to the previous screen

# Reprint

Use the reprint function to reprint past transaction details.

1. Tap ☰ on the Gift app main menu to open the admin menu

2. Tap **[REPRINT]**

3. The terminal displays two (2) options: **[LAST]** or **[LIST]**

   a. **[LAST]** – Captures the last gift card transaction

   b. **[LIST]** – Allows you to choose from a past transaction from the scrollable list

4. After selecting the option, select **[MERCHANT]** to print merchant copy or **[CUSTOMER]** to print customer copy.

# Admin parameters

To access the default settings, go to the **Gift Admin** and select **Edit Parameters**. The default setting menu displays all the default values such as language, auto-print receipts, training mode, gift preset amount, tipping, account credentials, and more.

All of the following settings are programmed based on your initial setup with Global Payments. To make changes to any of the following default settings, please contact the Global Payments Customer Care Centre at **1-888-682-3309**.

## Language

The Gift app language is managed by the language parameter in the Payments app.

## Auto-print receipts

The auto-print receipts feature is managed by the Payments app auto-reprint parameter.

## Tipping

As an optional function, you can collect gratuity as part of the redemption flow.

## Collect Clerk/Employee ID number

You can change whether or not the app should collect a Clerk (employee) ID number with every transaction.

## Receipt header/footer

The gift receipt header and footer are done during the setup process with your sales representative or by contacting the Global Payments Customer Care Centre. The gift receipt shares the same header and footer as your Payments application receipts for regular transactions.

# Common functions

The section below outlines all of the transactional and reporting processes for your Global Payments Gift Card Program. Note that not all functions are accessed through the same menu; some are directly accessible within the Payment apps and some can only be performed within the Gift menu page. Please see a full list of features below and how to access them.

There are three (3) functions that can be accessed directly from within the **Payments application main menu** on your terminal, through the **[SALE]** or **[END OF DAY PROCESSING]** function. The three functions are

1. Redeem

2. Add-on purchase

3. EOD processing for EOD reports
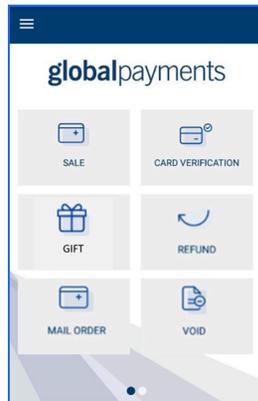
Click the functions above to navigate to the respective detailed instructions or refer to the Gift processing – Payments app section for details.

There are six (6) functions that can be accessed from the **Gift menu**. To access the Gift menu, tap the **[ 🎁 GIFT]** option on the Payments application main menu. The six functions are

1. Purchase

2. Multi-purchase

3. Adjust

4. Balance inquiry

5. Transfer

6. Void
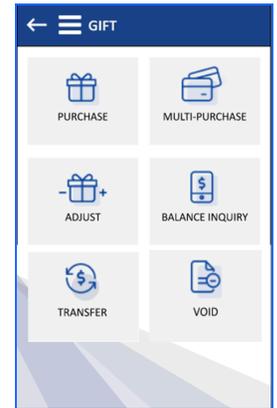
Click the functions above to navigate to the respective detailed instructions or refer to the Gift processing – Gift app section for details.

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**NOTE:**

To accept **QR code scanning**, the add-on virtual gift functions must be enabled. Please contact your sales representative or Global Payments Customer Care Centre at **1-888-682-3309** to have this function added.

**Manual entry** is disabled by default, please contact Global Payments Customer Care Centre at **1-888-682-3309** for details.

If the gift transaction was cancelled, timed out, or failed with activation, the transaction will be voided automatically.

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# Gift processing – Payments app

## 1 – Redeem

**The redeem function is used to redeem stored value from a gift account for the specified amount and currency**. Once the amount is specified, the balance within the gift card will be deducted accordingly. If the balance is non-zero but insufficient to cover the full redemption amount, the remaining balance in the gift card will be drained and the outstanding amount will be prompted for additional payment.

1.  Tap the **[SALE]** transaction icon on the **Payments** app menu

2.  Enter the **clerk ID** (if enabled) and tap **[ ✓ ]**. The clerk or server ID must be 1–4 digits

3.  Enter the **invoice #** (if enabled) and tap **[ ✓ ]**

4.  Enter the **transaction amount** and tap **[ ✓ ]**

5.  If the tip function is enabled, the cardholder can select one of the following options:

    a.  **[Select one of the three preset tip percentage options displayed on the screen]** – Select and proceed to the next step

    b.  **[Other]** – Enter the tip amount and proceed to the next step

    c.  **[ ✗ ]** – If selected, the terminal will then return to the Payments app main menu

6.  Tap **[ ✓ ]** to confirm the total amount, or tap **[ ▤ ]** to go back to step 4 to edit the amount

7.  Terminal displays **"the Normal Card Entry Screen – insert, tap, swipe, manual entry of card number, or scan gift QR code"**

8.  The cardholder may swipe the gift card, enter the gift card number, or scan the gift card QR code (only available with virtual gift)

9.  Once approved, the gift card balance is displayed on the screen, and the Gift receipt will be printed. If the payment is partially approved, follow the next step

10.  The screen displays "**CONTINUE WITH PAYMENT?**"

11.  If **[ ✗ ]** is selected, the transaction will be voided, and a void receipt is printed. The terminal will then return to the Payments app main menu.
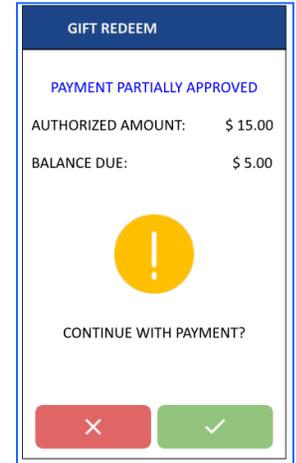
    If **[ ✓ ]** is selected, the partially approved receipt is printed or emailed, then proceed to **step 12** below.

12.  The screen displays "**CONTINUE NEXT TRANSACTION TO PROCESS BALANCE?**"

    a.  If **[ ✓ ]** is selected, proceed to step 13

    b.  If **[ ✗ ]** is selected, the application goes back to the **m**ain menu

    c.  If **[ 💵 CASH]** is selected, the message "**PAY BALANCE AMOUNT IN CASH?**" is displayed, tap **[ ✓ ]** then the application goes back to the main menu. Tap **[ ✗ ]** and the "**CONTINUE NEXT TRANSACTION TO PROCESS BALANCE?**" continue to display

13.  The terminal will repeat the payment process cycle from step 3, when full payment is made, proceed to step 14

14.  The terminal communicates with Global Payments and starts processing



GIFT REDEEM

PAYMENT PARTIALLY APPROVED

AUTHORIZED AMOUNT:  $ 15.00

BALANCE DUE:  $ 5.00

CONTINUE WITH PAYMENT?

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15. Transaction complete. Terminal prints out the merchant and customer receipts

For a sample view of the redeem receipts, please refer to Exhibit A – Receipt samples section at the end of this user guide.

## 2 – Add-On purchase

The add-on purchase function allows the customer to purchase a gift card or a virtual gift along with a merchandise/service purchased.  This request will also automatically activate the cardholder account.

1. Tap the **[SALE]** transaction icon on the **Payments** app menu

2. Enter the **clerk ID** (if enabled) and tap **[ ✔ ]**. The clerk or server ID must be 1–4 digits

3. Enter the **invoice #** (if enabled) and tap **[ ✔ ]**

4. Enter the **transaction amount** and tap **[ ✔ ]**

5. If the tip function is enabled, the cardholder can select one of the following options:

    a. **[Select one of the three pre-set tip percentage options displayed on the screen]** – Select and proceed to the next step

    b. **[Other]** – Enter the tip amount and proceed to the next step

    c. **[ ✖ ]** – If selected, the terminal will then return to the Payments app main menu

6. Tap **[ ⌸ ]** to add a gift card or virtual gift purchase

7. Tap one of the following options:

    a) **[Select one of the three preset amounts displayed on the

screen]** – This option will show up if it's enabled, select one and proceed to the next step

    b) **[Custom]** – Enter a custom gift amount and proceed to the next step

    c) **[ ✖ ]** – If selected, the terminal will then return to the Payments app main menu

8. Tap **[ ✔ ]** to confirm the total amount. If the amount needs to be adjusted, tap **[ ⌸ ]** to update the correct gift card amount and repeat steps 6 and 7, or tap **[ ▤ ]** to go back to step 4 to edit any specific amount

9. Terminal displays the **"Normal Card Entry Screen – insert, tap, or swipe, manual entry of card number"**. Follow the prompts to process the transaction.

10. The terminal communicates with Global Payments and starts processing

11. Transaction complete. Terminal prints out the merchant and customer receipts

12. You may now select the add-on purchase to be a gift card or a virtual gift with the following options:

    a. Tap **[GIFT CARD]** to purchase a physical gift card

    b. Tap **[VIRTUAL GIFT]** to purchase a virtual gift card  (if enabled)

13. If the **[GIFT CARD]** option is selected,  the cardholder can choose to swipe or manual entry of the gift card number or scan a QR code on the gift card

If the **[VIRTUAL GIFT]** option is selected, the cardholder enters their email address and tap **[ ✔ ]**. The cardholder will then receive an email to complete the virtual gift order online.  Please refer to the

14. The terminal communicates with the Global Payments Gift host and starts processing

15. Transaction complete. Terminal prints out the merchant and customer receipts

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**NOTE:**

A gift card may NOT be used as a form of payment for an **add-on purchase**.

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## 3 – End of Day processing for EOD gift Reports

Your End of Day (EOD) processing report is accessible within the Payments application on your terminal. By selecting this function, your terminal will send an EOD report request to our host and return an EOD gift report for your usage.

1. Tap **[END OF DAY PROCESSING]** on the **Payments** app menu

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**NOTE:**

By default, the **END OF DAY PROCESSING** function may be located on the second page, please swipe to the left to access.

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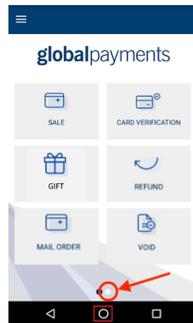
2. Enter the **manager password** and tap **[ ✔ ]**

3. The terminal communicates with Global Payments to close the batch

4. Once the EOD processing is completed, a **Close Batch Settlement** report will be printed, giving the status of the closed batch operation. Confirm the report displays "**BATCH # ###### ACCEPTED**" to verify that the settlement is complete

5. The terminal displays **"BATCH # ###### ACCEPTED"** and a payment report will be printed

6. The terminal then communicates with Global Payments Gift host

7. An EOD Gift report will be printed

# Gift processing – Gift app

## 1 – Purchase

Use the purchase function to purchase a single gift card or virtual gift. Performing this request will automatically activate the cardholder account.

1. Tap **[ 🎁 ] GIFT** to access the Gift menu

2. Tap **[Purchase]**

3. Enter the **clerk ID** (if enabled) and tap **[ ✔ ]**. The clerk or server ID must be 1–4 digits

4. Tap one of the following options:

   a. **[Select one of the three preset amounts displayed on the screen]** – This option will show up if it's enabled, select one and proceed to the next step

   b. **[Custom]** – Enter a custom gift amount and proceed to the next step

c. **[ ✗ ]** – If selected, the terminal will then return to the Payments app main menu

5. Tap **[Card]** or **[Cash]**

6. If **[Card]** is selected, enter the **invoice #** (if enabled) and tap **[ ✓ ]** then follow the sale prompts to complete the sale transactions, proceed to step 7

   If **[Cash]** is selected, proceed to step 9

7. The terminal communicates with Global Payments and starts processing

8. Transaction complete. Terminal prints out the merchant and customer receipts

9. You may now select the add-on purchase to be a gift card or a virtual gift with the following options:

   a. Tap [**GIFT CARD**] to purchase a physical gift card

   b. Tap **[VIRTUAL GIFT]** to purchase a virtual gift card  (if enabled)

10. If the **[GIFT CARD]** option is selected,  the cardholder can choose to swipe or manual entry of the gift card number or scan a QR code on the gift card

    If the **[VIRTUAL GIFT]** option is selected, the cardholder enters their email address and tap **[ ✓ ]**. The cardholder will then receive an email to complete the virtual gift order online.  Please refer to the [Completing an virtual gift purchase online](#) section for details.

11. The terminal communicates with the Global Payments Gift host and starts processing

12. Transaction complete. Terminal prints out the merchant and

customer receipts

For a sample view of the gift card purchase receipts, please refer to [Exhibit A – Receipt samples section](#) at the end of this user guide.

## 2 – Multi-purchase

Use the multi-purchase function to purchase and activate multiple gift cards with a single payment.

**NOTE:** This feature ONLY works with physical gift cards

1. Tap [ 🎁 ] **GIFT** to access the Gift menu

2. Tap **[Multi-Purchase]**

3. Enter the **clerk ID** (if enabled) and tap **[ ✓ ]**. The clerk or server ID must be 1–4 digits

4. Enter the **number of cards** to load

> **NOTE:**
>
> A maximum of 10 cards can be loaded at a time.

5. Enter the **amount** to load to each card

6. Tap **[Card]** or **[Cash]**

7. If **[Card]** is selected, enter the **invoice #** (if enabled) and tap **[ ✓ ]** then follow the sale prompts to complete the sale transactions, go to step 7

   If **[Cash]** is selected, go to step 9

8. The terminal communicates with Global Payments and starts

processing

9. Transaction complete. Terminal prints out the merchant and customer receipts

10. The screen displays "**PREPARE TO SWIPE, SCAN, OR ENTER CARD #1**", tap **[ ✔ ]**

11. The cardholder swipes the gift card, enters the gift card number, or scans the QR code on the gift card

> **NOTE:**
>
> Steps 10 and 11 will be repeated, depending on the number of cards selected for multi-purchase.

12. The terminal communicates with the Global Payments Gift host and starts processing

13. Transaction complete. Terminal prints out the merchant and customer receipts

## 3 – Adjust

Use the adjust function to add or subtract value from an activated gift card.

1. Tap **[ ⊞ ] GIFT** to access the Gift menu

2. Tap **[Add Value]** or **[Subtract Value]**

3. Enter the **clerk ID** (if enabled) and tap **[ ✔ ]**. The clerk or server ID must be 1–4 digits

4. Enter the **amount** to add or subtract

5. Swipe the gift card, enter the gift card number, or scan the QR code

on the gift card

6. The terminal communicates with the Global Payments Gift host and starts processing

7. Transaction complete. Terminal prints out the merchant and customer receipts

## 4 – Balance inquiry

Use the balance inquiry function to view the remaining balance on the selected gift card.

1. Tap **[ ⊞ ] GIFT** to access the Gift menu

2. Tap **[Balance Inquiry]**

3. Enter the **clerk ID** (if enabled) and tap **[ ✔ ]**. The clerk or server ID must be 1–4 digits

4. Swipe the gift card, enter the gift card number, or scan the QR code on the gift card

5. The terminal communicates with the Global Payments Gift host and starts processing

6. Balance received, the customer copy gift receipt is printed showing the balance in CAD

## 5 – Transfer

Use the transfer function to transfer balances from one stored value account to another. This function is typically performed to replace a lost or stolen account, or to consolidate two (2) or more accounts into one (1) account.

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**CAUTION:** After a transfer has been completed, the source account will be closed and can no longer be used. The balance for the destination account will be printed on the receipts in response.

1. Tap **[🎁] GIFT** to access the Gift menu.

2. Tap **[Transfer]**.

3. Enter the **clerk ID** (if enabled) and tap **[ ✓ ]**. The clerk or server ID must be 1–4 digits

4. The screen displays "**PREPARE TO SWIPE, SCAN, OR ENTER CARD TO TRANSFER FROM**", tap **[ ✓ ]**

5. First, use **the gift card that is being transferred**. You can swipe the card, enter the card number, or scan the QR code on card

6. The screen displays "**PREPARE TO SWIPE, SCAN, OR ENTER CARD TO TRANSFER TO**" then tap **[ ✓ ]**

7. Now use **the gift card that will receive the transfer amount**. You can swipe the card, enter the card number, or scan the QR code on card

8. The terminal communicates with the Global Payments Gift host and starts processing

9. The screen displays the transferred amount and the balance on the gift card that received the transfer

10. Transaction complete. Terminal prints out the merchant and customer receipts, showing the transferred amount and the balance on the gift card that received the transfer

## 6 – Void

Use the void function to void (undo) a previously successful transaction. The original response from the host for the transaction to be voided contained a unique REF #, which is used to identify the transaction. This REF # is printed on the **merchant/customer receipts** and it is used to specify to the host which transaction is to be voided. The void feature can only reverse/void the total amount. There is no partial reversal.

> **NOTE:**
>
> The **CLERK/SERVER #** printed will be for the clerk/server who processed the void transaction and not the clerk/server who completed the original transaction.

1. Tap **[🎁] GIFT** to access the Gift menu

2. Tap **[Void]**

3. Enter the **manager password** and tap **[ ✓ ]**

4. Enter the **clerk ID** (if enabled) and tap **[ ✓ ]**. The clerk or server ID must be 1–4 digits

5. Tap one of the following options:

   a. **[Last]** – This option allows you to proceed to void the last gift transaction

   b. **[List]** – This option allows you to select the transaction to void from the scrollable list

> **NOTE:**
>
> The scrollable list will contain all transactions since last the gift report was printed during the Payment app's EOD processing.

c.   **[ ✖ ]** – If selected, the terminal will then return to the Payments app main menu

6.   The terminal communicates with the Global Payments Gift host and starts processing

7.   The screen displays the "**Transaction Voided**"

8.   Transaction complete. Terminal prints out the merchant and customer receipts

# Completing a virtual gift purchase

**NOTE:** To enable the virtual gift add-on option, please contact Global Payments at **1-888-682-3309**

After a Virtual Gift is purchased, the buyer must go to the mailbox that they entered on the terminal to finish entering the recipient information, choosing a design, adding a custom message, and sending it out to the recipient.

1.   Open the virtual gift email and click **[Complete My Virtual Gift Now]**

2.   Enter the **recipient's name** and the **sender's name**

3.   Choose a theme from the drop-down menu, select a design, and click **[CONTINUE]**

4.   Enter the **recipient's email address** and a **personalized message**

5.   Review the information and click **SEND** to complete sending the virtual gift. If you wish to modify any information, click **[START OVER] and** then repeat steps 2 to 5

6.   The recipient will receive a virtual gift email that contains the **QR code**, **account #** and **PIN**.



7.   The sender/buyer will receive a confirmation email with the **order #** that the virtual gift has been sent.
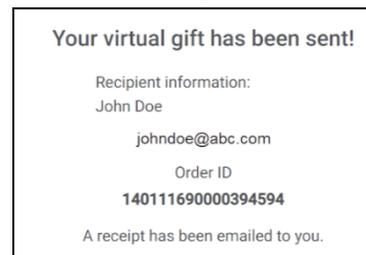
# Gift Management Tool

For information on how to navigate the management tool, please refer to the **Global Payments Gift Management Tool User Guide.**

# Gift card holder inquiries

## Balance inquiries

- Call **1-800-939-4438** (GIFT) to request for balance inquiry

- Visit: **www.globalpaymentsinc.com/en-ca/mygiftcard** and enter the cardholder account credentials for balance

## Other inquiries

For all other inquiries, cardholders should contact the merchant directly

# Additional resources

If you require any assistance with terminal download and installation, program training, or general program inquiries, please don't hesitate to contact Global Payments at **1-888-682-3309**. Our team will be happy to help you out.

# Exhibit A – Receipts

**NOTE:** Gift card balances will show on the **customer copy** ONLY.

## Redeem receipt samples

```
        RECEIPT HEADER LINE 1
        RECEIPT HEADER LINE 2
        RECEIPT HEADER LINE 3
        RECEIPT HEADER LINE 4
        RECEIPT HEADER LINE 5
        RECEIPT HEADER LINE 6

8/13/22              5:21 PM

MERCHANT #: *********O12
TERM ID: *****678
CLERK #: 1234
MAG STRIPE          SWIPE
GIFT
ACCT #: **************1234
        GIFT REDEEM
        REF #: 120100010000000063

AMOUNT        CAD   $20.00
TIP        CAD   $4.00
TOTAL        CAD   $24.00

        APPROVED

        MERCHANT COPY
```

```
        RECEIPT HEADER LINE 1
        RECEIPT HEADER LINE 2
        RECEIPT HEADER LINE 3
        RECEIPT HEADER LINE 4
        RECEIPT HEADER LINE 5
        RECEIPT HEADER LINE 6

8/13/22              5:21 PM

MERCHANT #: *********O12
TERM ID: *****678
CLERK #: 1234
MAG STRIPE          SWIPE
GIFT
ACCT #: **************1234
        GIFT REDEEM
        REF #: 120100010000000063

AMOUNT        CAD   $20.00
TIP        CAD   $4.00
TOTAL        CAD   $24.00

        APPROVED

BALANCE        CAD   $0.00

        <host streamed note>

        RECEIPT FOOTER LINE 1
        RECEIPT FOOTER LINE 2
        RECEIPT FOOTER LINE 3
        RECEIPT FOOTER LINE 4

        CUSTOMER COPY
```

## Gift card receipt samples

```
        RECEIPT HEADER LINE 1
        RECEIPT HEADER LINE 2
        RECEIPT HEADER LINE 3
        RECEIPT HEADER LINE 4
        RECEIPT HEADER LINE 5
        RECEIPT HEADER LINE 6

8/13/22              5:21 PM

MERCHANT #: *********O12
TERM ID: *****678
CLERK #: 1234
MAG STRIPE          SWIPE
GIFT
ACCT #: **************1234
        GIFT PURCHASE
        REF #: 120100010000000063

AMOUNT        CAD   $20.00

        APPROVED

        MERCHANT COPY
```

```
        RECEIPT HEADER LINE 1
        RECEIPT HEADER LINE 2
        RECEIPT HEADER LINE 3
        RECEIPT HEADER LINE 4
        RECEIPT HEADER LINE 5
        RECEIPT HEADER LINE 6

8/13/22              5:21 PM

MERCHANT #: *********O12
TERM ID: *****678
CLERK #: 1234
MAG STRIPE          SWIPE
GIFT
ACCT #: **************1234
        GIFT PURCHASE
        REF #: 120100010000000063

AMOUNT        USD   $20.00

        APPROVED

BALANCE        CAD   $20.00

        <host streamed note>

        RECEIPT FOOTER LINE 1
        RECEIPT FOOTER LINE 2
        RECEIPT FOOTER LINE 3
        RECEIPT FOOTER LINE 4

        CUSTOMER COPY
```