Moneris

Moneris eGift card program.

Reference guide

Revised: January 30, 2026

Table of contents.

Getting started.

In this section, we go over everything you need to know to integrate the Moneris eGift iFrame into your ecommerce site.

What is the Moneris eGift iFrame?

The Moneris eGift iFrame is a Web-based solution that you can easily integrate into your ecommerce site so that you can sell eGift cards (digital format).   You can customize eGift cards with your own branding and allow your customers to select from among your eGift cards, choose the delivery time/format of their orders, and include personal messages to eGift card recipients. The eGift cards can be used to buy your goods/services from you instore or online. You can also configure a promotion to reward your customers for qualifying purchases.

Because the Moneris eGift solution is deployed through an embedded iFrame, it the maintains the consistent look and feel of your site and enables your customers to experience a seamless shopping experience on your site.

Ready to get started?

Proceed to the <u>How to get started</u> steps (page 7).

How to get started

The steps below describe what you need to do to integrate our Moneris eGift iFrame solution into your ecommerce site.

1 Contact us so that we can set up your account and help you to define your eGift card program parameters (see Defining your eGift card program parameters (page 8).

2 Re-initialize your Moneris point-of-sale terminals / perform a manual Sync (Moneris Go terminals).

Note: *Re-initialization/Synchronization ensures that your in-store devices are ready to accept eGift cards when customers present them to pay for your goods or services.*

3 Confirm that your PC/mobile device meets the minimum requirements so that you can use our self- serve tools to manage and administer your eGift card program:

- Up-to-date supported browser installed (e.g., Google Chrome, Microsoft Edge, and Apple Safari)
- Cookies enabled
- Internet access

4 Confirm that we sent you the following IDs and credentials:

- Moneris eGift **iFrame URL** and **program ID** (Refer to the "Your eGift Program is Ready!" email.)

- Client Portal **Email** and **Password** (Refer to the "eGift Program Account Information" email.)

- Moneris **Merchant ID** (Refer to the "eGift Program Account Information" email.)

- Merchant Resource Center **Username**, **Store ID**, and **Password** (Refer to the "eGift Program Account Information" email.)

5 Upload your eGift card images via the Client Portal (see Uploading a card image on page 13).

6 Embed the Moneris eGift iFrame code into your ecommerce site (see Embedding the Moneris eGift iFrame code on page 21).

7 If you want to configure a promotion, see Promotional eGift card feature (page 24).

8 When you are finished, please review the information in Administrator users (page 94).

Defining your eGift card program parameters

As part of your program setup (see <u>How to get started</u> on page 7), we will assist you to define your eGift card parameters, which can include the following:

- Administrator user access (see <u>Administrator users</u> on page 94).

- Purchase amount threshold (see <u>Purchase amount threshold</u> on page 95).

- Notification alert timing (see <u>Notification alerts</u> on page 82).

- Maximum number of card images (see <u>Uploading a card image</u> on page 13).

- Short code support (see <u>Using the eGift card in-store at a point-of-sale</u> on page 92).

Managing your image files.

In this section, we go over everything you need to know about managing the image files and how to deploy them to your Moneris eGift iFrame.

eGift card image management settings

The steps below describe how to access your eGift card image management settings in the Client Portal so that you can upload, edit, modify, or delete the card images you want to deploy to your Moneris eGift iFrame.[1]

Note: *You may upload/replace images as often as you require (e.g., you may want to incorporate specific themes for different holiday or seasonal promotions depending on the time of year).*

1. Log into the Client Portal (see <u>Logging into the Client Portal</u> on page 67).

2. When the homepage displays (shown below), click on **Card Management** in the menu bar.
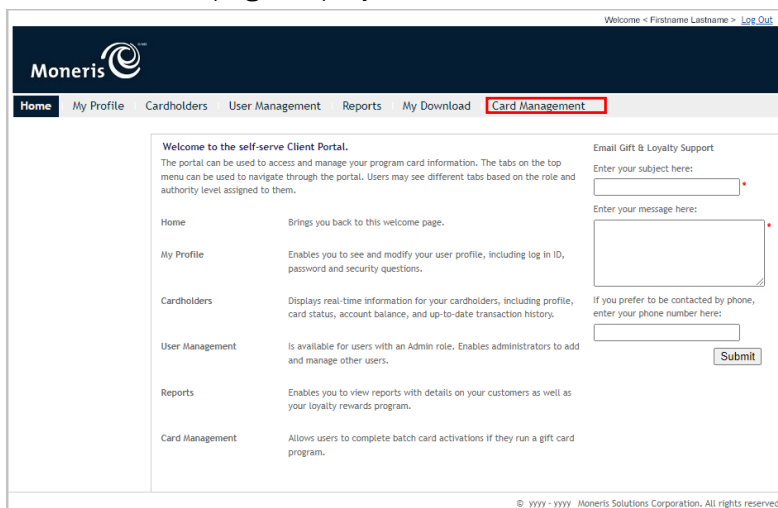
3. When the "Actions" navigation pane displays (shown below), click on **eGift Program Management**.

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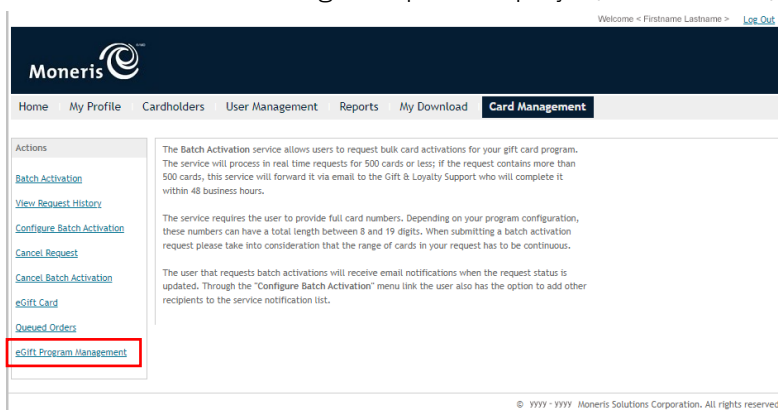
[1] For more on how your customers interact with the iFrame when they are shopping for eGift cards, see <u>The order process described</u> (page 55).

![Moneris logo]

4. When the "eGift Program List" page displays (shown below), click on the program ID of the eGift card program for which you want to manage the card images.
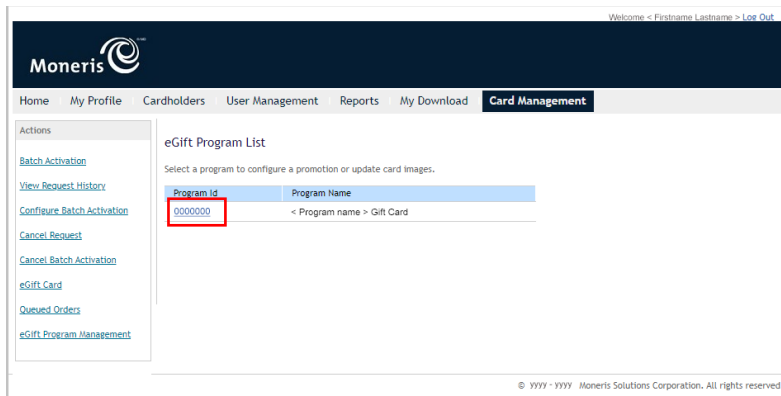
5. When the "Promotions - < your program ID >" page displays (shown below), click on **eGift Card Images Management** in the "Actions" pane.
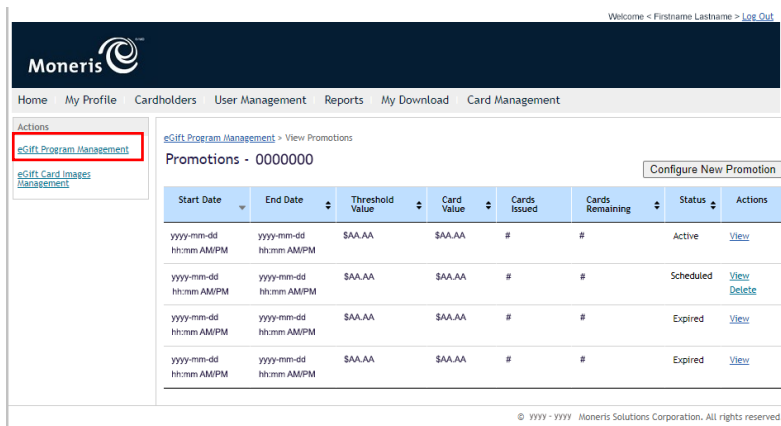
6. When the "eGift Card Images" page displays (shown below), you can do any of the following:
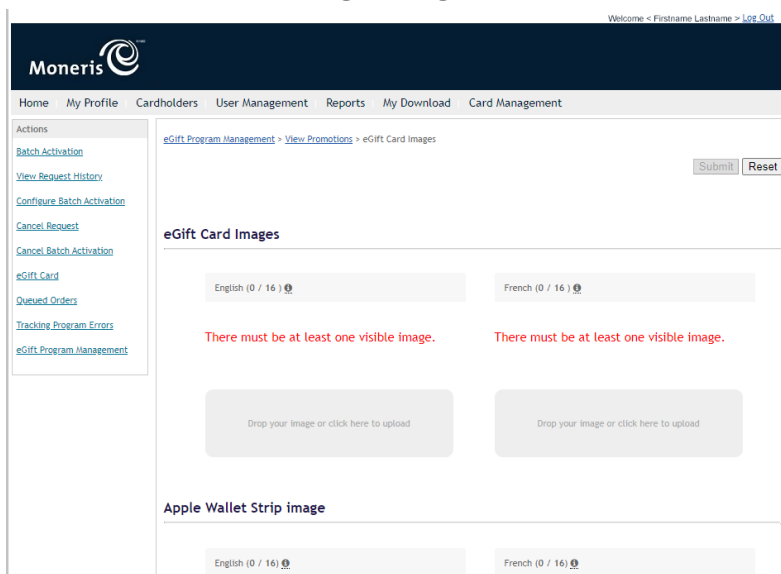
- To upload a new card image, see <u>Uploading a card image</u> (page 13).
- To delete an uploaded card image, see <u>Deleting an uploaded card image</u> (page 16).
- To edit an uploaded card image, see <u>Editing an uploaded card image</u> (page 17).

![Moneris logo]

Uploading a card image

The steps below describe how to upload one or more eGift card images (English and/or French) to your Moneris eGift iFrame.[2] You choose which image(s) to feature on the English or French deployment of your iFrame.

Important! Please ensure the image(s) that you want to upload are formatted according to the specifications outlined in <u>Image file specifications</u> (page 19).

1. Access your eGift card image management settings (see <u>eGift card image management settings</u> on page 10).

2. On the "eGift Card Images" page (shown below), do one of the following to upload a card image:

   Note: The page shown below depicts an example wherein no card images are uploaded. If you have previously uploaded one or more images, they will be featured on your own "eGift Card Images" page.

EMPTY "ENGLISH" IMAGE PLACEHOLDER

EMPTY "FRENCH" IMAGE PLACEHOLDER

To upload an image using "drag-and-drop":

a. Locate the desired image (**JPEG**, **PNG** or **GIF** file type) on your device drive.

b. Drag the image file over the empty "English" or "French" image placeholder in the "eGift Card Images" area (shown above), and release the image.
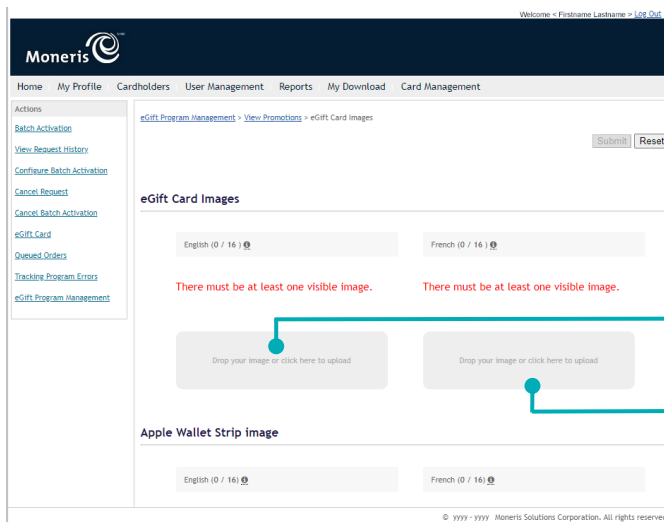
   Note: If there is no empty image placeholder for the desired language type, it means you have reached the maximum card image limit set for your program. Please delete a card image first (see <u>Deleting an uploaded card image</u> on page 16).

c. Wait while the upload processes.

To upload an image using file manager dialog:

a. Click on the empty image placeholder ("English or "French") in the "eGift Card Images" area (shown above) to launch your device's file manager dialog.
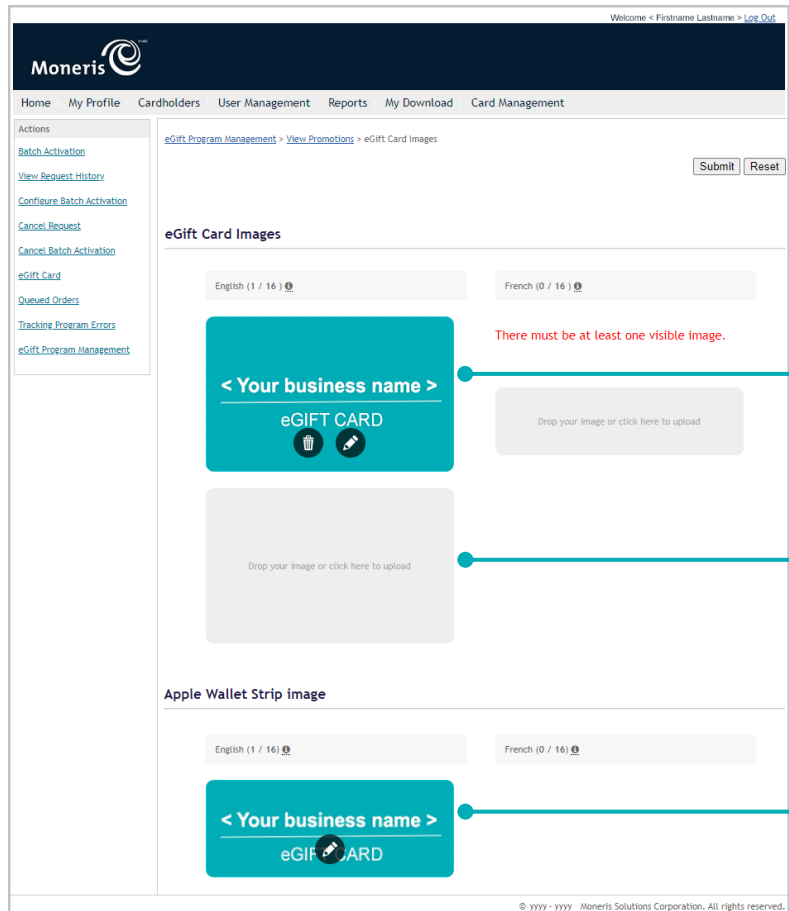
   Note: If there is no empty image placeholder for the desired language type, it means you have reached the maximum card image limit set for your program. Please delete a card image first (see <u>Deleting an uploaded card image</u> on page 16).

b. Locate the desired image (**JPEG**, **PNG** or **GIF** file type), and click on it.

c. Wait while the upload processes.

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[2] When your images are deployed to your iFrame, customers shopping for your eGift cards from your site can opt to feature any of the images on the eGift card(s) they are ordering (see <u>The order process described</u> on page 55).

3. When the upload completes, the image fills the image placeholder (shown below).

   Note: If you uploaded an image per the specifications outlined in Image file specifications (page 19), the image also automatically fills the corresponding image placeholder in the "Apple Wallet Strip image" area. A new empty image placeholder appears if your eGift card program permits the upload of another image.

NEWLY UPLOADED "ENGLISH" CARD IMAGE

NEW "ENGLISH" IMAGE PLACEHOLDER (EMPTY) APPEARS HERE

NEW "APPLE WALLET STRIP" IMAGE APPEARS HERE (CORRESPONDS TO NEWLY UPLOADED "ENGLISH" CARD IMAGE)

4. You may take any of the following actions:

   ▪ To upload another card image, repeat from step 2 (page 13).

      Note: If your ecommerce solution supports the both the English and French deployments of the Moneris eGift iFrame, you would repeat the steps to upload a matching card image in the alternate language.

   ▪ To edit an uploaded image, see Editing an uploaded card image (page 17).

   ▪ To delete an uploaded image Deleting an uploaded card image (page 16).

   ▪ To reset your image configuration back to its previous state, click on the **Reset** button or click on any other Client Portal menu item to go to a different page.

   ▪ To proceed and upload the image(s), go to step 5.

5. Click on the **Submit** button.

6. When the "Submit Card Images" dialog displays (shown below), click on its **Yes** button.
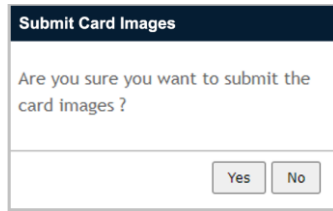
7. When the "Upload has been successfully saved" response displays, the operation is complete.

   Important! If you are setting up your Moneris eGift iFrame for the first time, please ensure to embed the customized Moneris eGift iFrame code into your ecommerce site per our specifications (see Embedding the Moneris eGift iFrame code on page 21).

Deleting an uploaded card image

The steps below describe how to delete an uploaded eGift card image from your Moneris eGift iFrame.

Note: Once you have deleted the card image, it will no longer be deployed in your Moneris eGift iFrame for your customers to select when they are placing their order (see Placing an order on page 57).

1. Access your eGift card image management settings (see eGift card image management settings on page 10).

2. On the "eGift Card Images" page (shown below), do the following:

   Note: The page shown below depicts a scenario wherein four "English" card images and four matching "French" card images are currently uploaded.

   a. Locate the card image that you want to delete, and click on its **Remove** 🗑 icon (shown below).
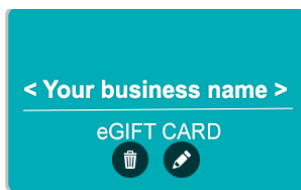
   b. Wait while the request is processed.

   c. When the card image is deleted, only its empty image placeholder remains.

3. Click on the **Submit** button.

4. When the "Submit Card Images" dialog displays (shown below), click on its **Yes** button.
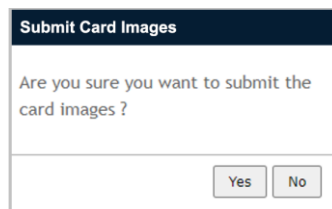
5. When the "Upload has been successfully saved" response displays, the operation is complete.

   Important! If you are setting up your Moneris eGift iFrame for the first time, please ensure to embed the customized Moneris eGift iFrame code into your ecommerce site per our specifications (see Embedding the Moneris eGift iFrame code on page 21).
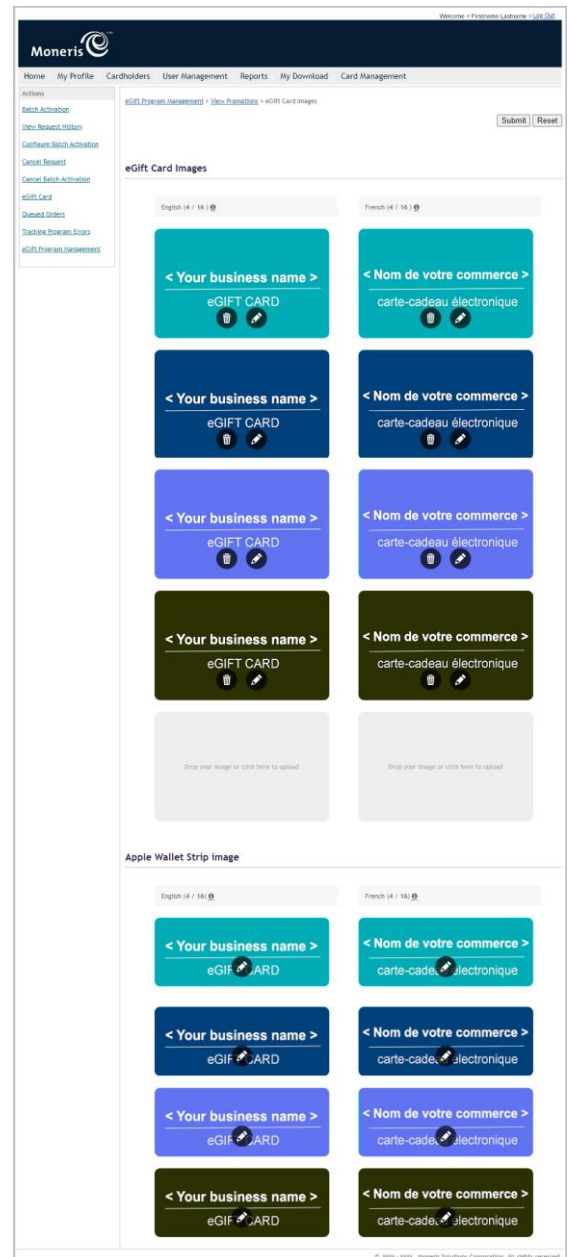
Editing an uploaded card image

The steps below describe how to use the Client Portal's editing tools to crop or rotate an uploaded eGift card image.

Note: Once you save (submit) your edits, the updated image will be deployed to your Moneris eGift iFrame for your customers to select when they are placing their order (see Placing an order on page 57).

1. Access your eGift card image management settings (see eGift card image management settings on page 10).

2. On the "eGift Card Images" page (shown below on the right), do the following:

   Note: The page shown below depicts a scenario wherein four "English" card images and four matching "French" card images are currently uploaded.

   a. Locate the card image that you want to edit, and click on its **Edit** icon (shown below).
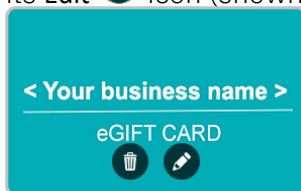
   b. When the edit tools panel and frame borders display (shown below), you may do any of the following:

   FRAME BORDERS

   "EDIT TOOLS" PANEL
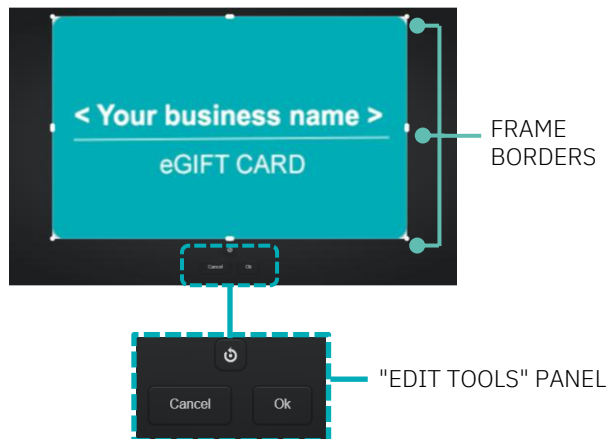
   - To crop the image, click and drag on the frame borders to extend or retract them vertically or horizontally as required.

     Note: If the uploaded image is already sized to the correct dimensions (see Image file specifications on page 19), you will not be able to perform additional edits.

   - To rotate the image, click on the **Rotate** button until you achieve the desired orientation.
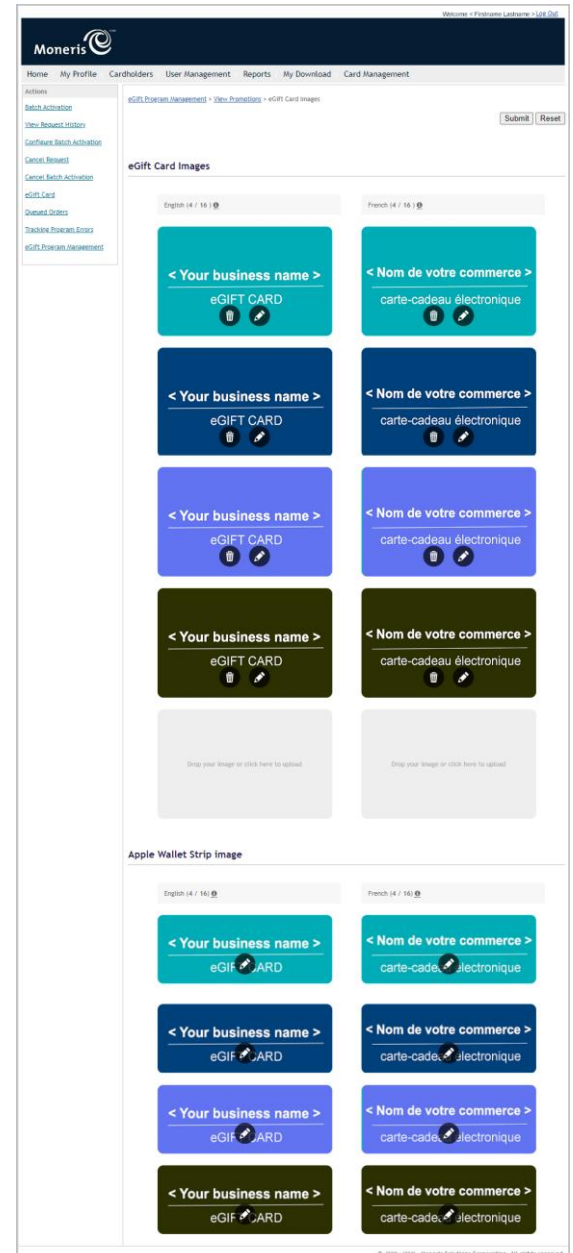
c. When you are finished making your edits, click on the **Ok** button to close the edit tools panel (shown on the previous page).

d. Click on the **Submit** button near the top of the page.

e. When the "Submit Card Images" dialog displays (shown below), click on its **Yes** button.
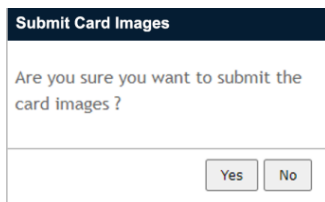
f. When the "Upload has been successfully saved" response displays, the operation is complete.

Important! If you are setting up your Moneris eGift iFrame for the first time, please ensure to embed the customized Moneris eGift iFrame code into your ecommerce site per our specifications (see Embedding the Moneris eGift iFrame code on page 21).

Image file specifications

The artwork images that you want to upload and feature on your eGift cards must conform to the following specifications as outlined in the table below.

Note: *Your card images will be featured prominently on your eGift cards and throughout the order process (see Placing an order on page 57).*

Image specification	Description
Logo	Your logo must be distinctively visible in the eGift card. (The logo is an immediate identifier of your card for your staff and the recipient.)
Supported file types	PNG, JPG, and GIF
Transparency	We recommend that you do not incorporate transparency in your images; they should be 100% opaque.
Maximum file size	320 KB
Dimensions	eGift card: — Width: 300 pixels — Height: 188 pixels Apple Wallet Strip: — Width: 312 pixels — Height: 123 pixels

Ready to upload your card images?

▪ To upload the card images for display on your Moneris eGift iFrame,[3] see Uploading a card image (page 13).

Note: *If your ecommerce solution supports the both the English and French deployments of the Moneris eGift iFrame, please ensure to create matching card images in each language. Once uploaded, the "English" card image will be featured on the English deployment of the iFrame while the matching "French" card image will be featured on the French deployment of the iFrame.*

▪ To upload a card image for a specific promotion, see Promotional eGift card feature (page 24).
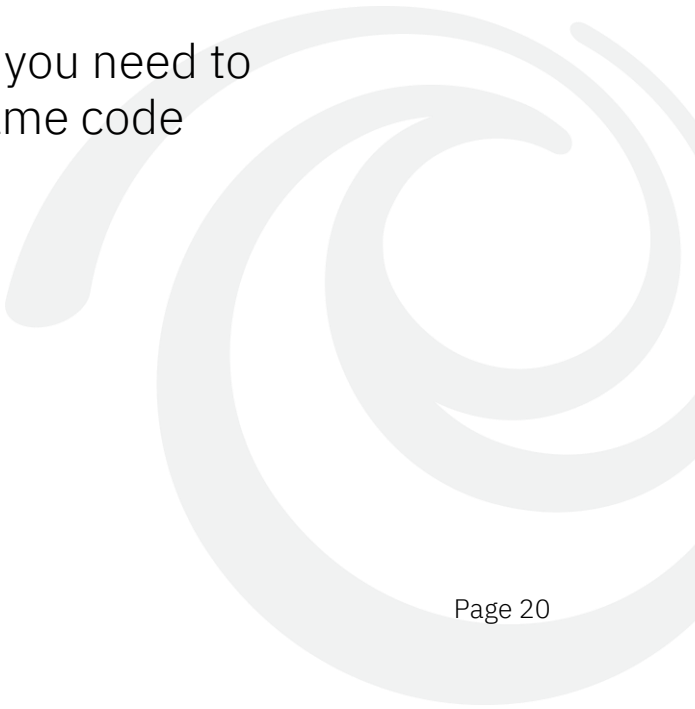
Note: *The same card image will be featured on all promotional cards issued for the promotion regardless of whether customers submit their eGift card orders through the English or French deployment of the Moneris eGift iFrame.*

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[3] When you upload an eGift card image at the correct dimensions for the iFrame, it will automatically be formatted to render in the Apple wallet strip format.

Embedding the Moneris eGift iFrame code.

In this section, we go over everything you need to know to embed the Moneris eGift iFrame code into your ecommerce site.

Embedding the Moneris eGift iFrame code

Follow the steps below to embed the Moneris eGift iFrame code into your ecommerce site.

Important! Do not continue with these steps unless you have already uploaded your card image(s) to your Moneris eGift iFrame (see Uploading a card image on page 13).

1. On your ecommerce site, create an HTML hyperlink (e.g., "eGIFT CARDS") that opens the sub-page that will host your eGift iFrame (see example below).

CUSTOMER CLICKS HERE TO LAUNCH THE SUB-PAGE
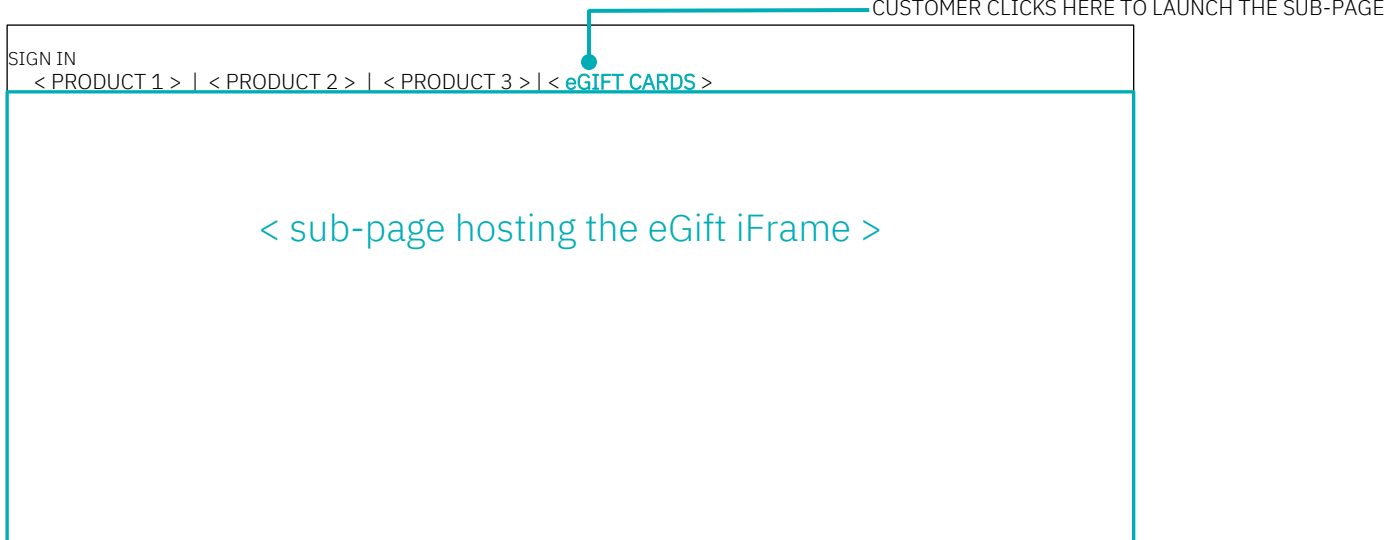
SIGN IN
< PRODUCT 1 > | < PRODUCT 2 > | < PRODUCT 3 > | < eGIFT CARDS >

< sub-page hosting the eGift iFrame >

2. Refer to your Moneris "Your eGift iFrame is Ready!" email to obtain your eGift iFrame code. This code contains a customized URL, which is specific to your eGift card program (see labelled URL example below).

Your eGift card **program ID**

https://vgdelivery.com/VirtualGiftCard?ProgramId=< PID >&currentCulture=<Language >

Language of the Moneris eGift iFrame: **0** = **English** | **1**= **French**

3. Embed the iFrame code in an eGift cards sub-page on your ecommerce site (see example below).

SIGN IN
< PRODUCT 1 > | < PRODUCT 2 > | < PRODUCT 3 > | < eGIFT CARDS >

eGIFT CARDS SUB-PAGE

<iframe width="100%" height="1700x" frameborder="0"
     scrolling="no"src=https://vgdelivery.com/VirtualGiftCard?
     ProgramId=#######&currentCulture=#</iframe>
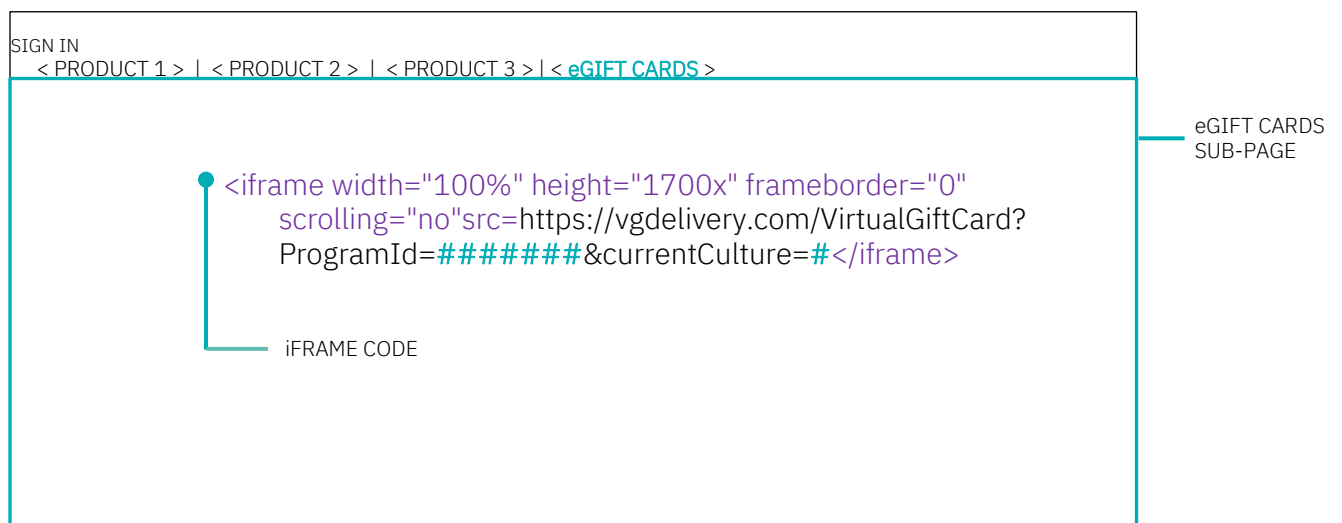
iFRAME CODE

Example: If your eGift program ID is "#######", then:
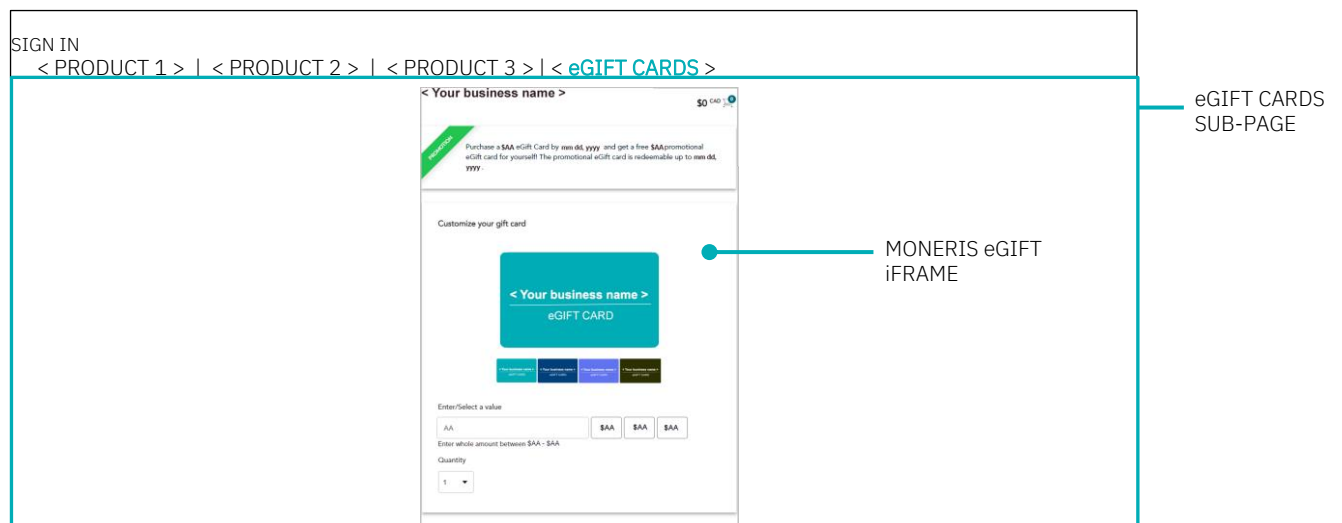
- To render the Moneris eGift iFrame in English, you would embed the iFrame code containing your "English" URL:

  https://vgdelivery.com/VirtualGiftCard?ProgramId=#######&currentCulture=0

- To render the Moneris eGift iFrame in French, you would embed the iFrame code containing your "French" URL:

  https://vgdelivery.com/VirtualGiftCard?ProgramId=#######&currentCulture=1

4. When you are finished, the Moneris eGift iFrame should be deployed to your ecommerce site as shown in the "English" example below. (Customers visiting your site can order eGift cards as described in Placing an order on page 57.)

5. Continue the How to get started steps (page 7).

Configuring a promotion.

In this section, we describe everything you need to know to start, update, or end a promotion for your eGift card program.
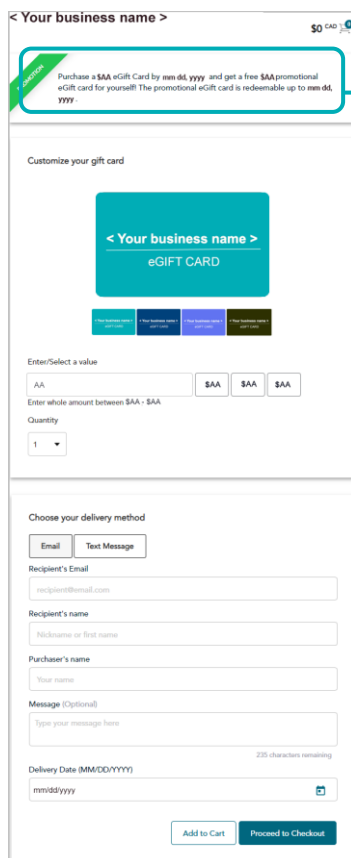
Promotional eGift card feature

If you configure a promotion for your eGift card program, you can reward qualifying eGift card purchasers with one or more free promotional eGift cards (funded by you), which they can use instore or online to purchase your goods/services. Promotional cards expire on a date that is based on the redemption period you configure for your promotion (for configuration options, see <u>Promotion configuration options: starting, updating, or ending a promotion</u> on page 26).

How a promotion works

If your promotion is active, a "PROMOTION" panel displays at the top of your Moneris eGift iFrame (shown below). This panel advertises the opportunity for purchasers to receive a promotional eGift card for themselves if an eGift card item in their order equals or exceeds the promotion purchase threshold set for your program.

Note: *For examples of how purchases can trigger the issuing of one or more promotional cards to a customer, see* <u>Example purchase - promotion scenarios</u> *(page 25).*

— Promotion panel text: "PROMOTION
Purchase a $AA eGift Card by mm dd,yyyy
and get a free $AA promotional eGift card
for yourself! The promotional eGift card is
redeemable for up to mm dd, yyyy."

Once we successfully process and complete a purchaser's qualifying order, we load[4] and send one or more promotional eGift cards to the email address registered by the purchaser when they submitted their order (see <u>The order process described</u> on page 55).

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[4] The amount loaded on the card(s) is dependent on the configuration of your promotion.

Example purchase - promotion scenarios

If you have configured a promotion that is currently active (see Promotional eGift card feature on page 24), one or more promotional eGift cards will be issued to customers purchasing eGift cards based on the promotion setup example and purchase scenarios described below.

- **Promotion setup example:** Your promotion purchase threshold is set to **$50.00**. Your promotion is configured to issue a **$20.00** promotional eGift card for the purchase of an eGift card item that meets or exceeds that set promotion purchase threshold.

- **Customer purchase example 1:** A customer purchasing **1x $100.00** eGift card in single order would receive **1x $20.00** promotional eGift because the dollar value of the purchased eGift card <u>exceeds</u> the set promotion purchase threshold.

- **Customer purchase example 2:** A customer purchasing **1x $40.00** eGift card and **2x $50.00** eGift cards in an order would receive **2x $20.00** promotional eGift cards because the dollar value of each purchased $50.00 eGift card in the order <u>equals</u> the set promotion purchase threshold.

  Note: *The $40.00 eGift card fails to qualify because it is <u>below</u> the set promotion purchase threshold.*

- **Customer purchase example 3:** A customer purchasing **2x $40.00** eGift cards in an order would not receive any promotional eGift cards because the dollar value of <u>neither</u> of the purchased eGift cards in the order equals or exceeds the set promotion purchase threshold.

- **Customer purchase example 4:** A customer purchasing **1x $30.00** eGift card and **1x $60.00** eGift card in an order would receive **1x $20.00** promotional eGift because only the dollar value of the purchased $60.00 eGift card <u>exceeds</u> the set promotion purchase threshold.

  Note: *The $30.00 eGift card fails to qualify because it is <u>below</u> the set promotion purchase threshold.*

Promotion configuration options: starting, updating, or ending a promotion

For instructions on how to start and manage (update or end) a promotion[5] refer to the appropriate procedure below:

- To configure a new promotion that you want to start today or you want schedule to start on a future date, see Configuring a new promotion (page 27).

- To update one or more parameters of a scheduled promotion, see Updating a scheduled promotion (page 32).

- To update one or more parameters of a live (active) promotion for which no promotional cards are activated, see Updating an active promotion: promotional cards activated - no (page 38).

- To update one or more parameters of a live (active) promotion for which one or more promotional cards are activated, see Updating an active promotion: promotional cards activated - yes (page 44).

- To force-stop a scheduled or active promotion prior its configured end date, see Force-stopping/ending a promotion (page 50).
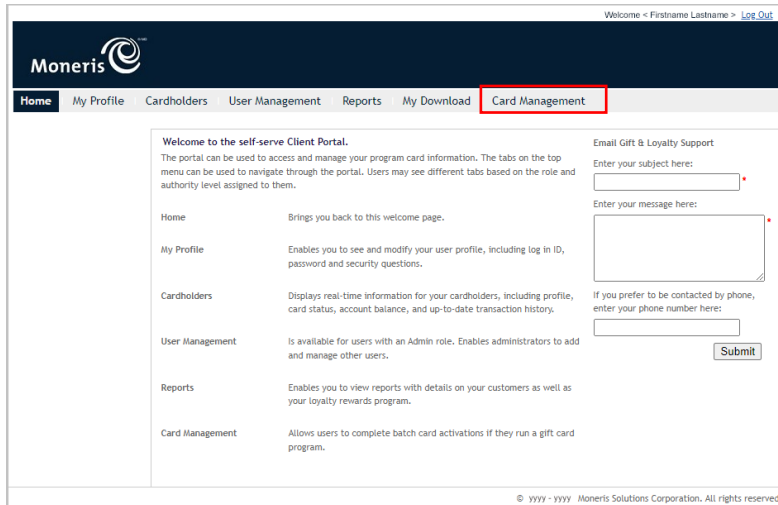
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[5] For more information about how a promotion works, see Promotional eGift card feature (page 24).
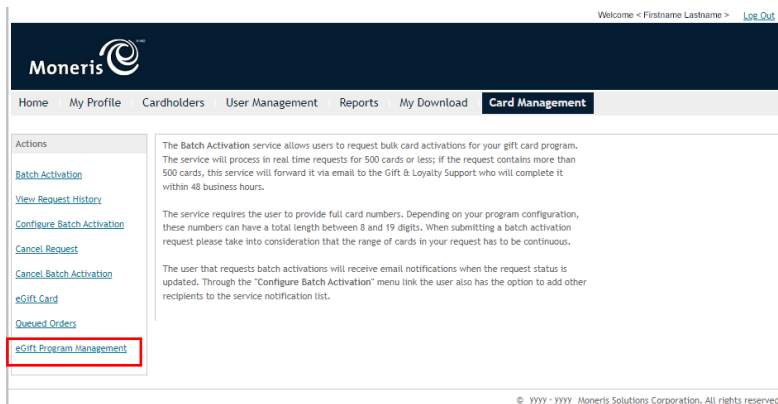
Configuring a new promotion

The steps below describe how to configure a new promotion[6] for your eGift card program. You may set the promotion to start (i.e., be active) today or schedule the promotion to start on a future date.

Important! If you are setting up your Moneris eGift iFrame for the first time, please ensure that you follow the How to get started steps on page 7.

1. Log into the Client Portal (see Logging into the Client Portal on page 67).

2. When the homepage displays (shown below), click on **Card Management** in the menu bar.

3. When the "Actions" navigation pane displays (shown below), click on **eGift Program Management**.

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[6] For more information about how a promotion works, see Promotional eGift card feature (page 24).

![Moneris logo]

4. When the "eGift Program List" page displays (shown below), click on the program ID of the eGift card program for which you want to configure a promotion.
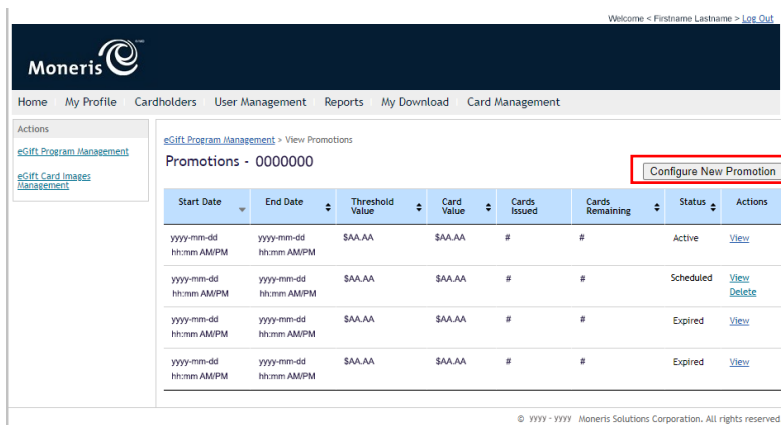

5. When the "Promotions - < your program ID >" page displays (shown below), click on the **Configure New Promotion** button.

6. When the "Configure New Promotion - <your program ID>" page displays (shown below), go to the next step.

7. Go to the "Promotion Details" area (shown on previous page), and enter the descriptive details of this promotion:

   a. In the **Promotion Name (En)** field, enter the promotion name in English.

   b. In the **Promotion Name (Fr)** field, optionally enter the promotion name in French.

   c. In the **Description (En) (internal)** field, enter the promotion description in English.

   d. In the **Description (Fr) (internal)** field, optionally enter the promotion description in French.

8. Go to the "Promotion Settings" area (shown on previous page), and configure the promotion purchase threshold; card value; and card quota:

   a. In the **Promotion Card Value ($)** field, enter the dollar amount to load on any eGift card that is sent as part of this promotion.

   b. In the **Purchase Threshold ($)** field, enter the purchase amount (i.e., for one eGift card item) that must be equalled or exceeded to qualify a purchaser to receive an eGift card for this promotion.

   Note: The purchaser would receive a free promotional eGift card for each qualifying item that they included in their order.

   c. In the **Card Quota** field, enter the maximum number of eGift cards that you want to be made available as part of this promotion (e.g., if your promotional budget is $2000, and you are offering $10 promotional eGift cards, you would enter "200" into this field to limit the number of promotional eGifts to match your budget).[7]

9. Go to the "Promotion Period" area (shown on previous page), and set the date range for which you want the promotion to be active:

   Note: When the promotion is active, it will be advertised on your Moneris eGift iFrame (see <u>Placing an order</u> on page 57).

   a. Click on the **Start Date** field, and select the promotion start date (dd/mm/yyyy).

   b. Click on the **End Date** field, and select the promotion end date (dd/mm/yyyy).

10. Go to the "Redemption Period" area (shown on previous page), and set the date range during which the promotional cards will be redeemable at your point of sale.[8] You have two options:

    To set the redemption period based on card activation date:

    a. Select **Days After Activation**. Then, click on the corresponding field, and enter the number of days the card should remain active following card activation.

    Note: Card activation occurs on the date that the order is approved (auto-approved or manually approved). We send the promotional card to the purchaser via their notification on the same day as card activation.

---

[7] A buffer of 25 promotions eGift cards will be available for this promotion over and above the maximum number of cards that you set. The buffer cards will be used under these conditions: 1) if multiple qualifying orders are queued that deplete your inventory of promotion cards; or 2) if an individual order qualifies for multiple promotion cards that exceed the quantity of available promotion cards.

[8] Once the redemption period passes for a promotional eGift card, we deactivate the card regardless f the remaining balance.

To set a redemption period start date and end date that are independent of card activation date:

a. Select **Start Date & End Date**. Then, click on the **Start Date** field, and select a redemption period start date (dd/mm/yyyy).

Note: The start date must be on or after the promotion activation date (defined in step 9).

b. Click on the **End Date** field, and select a redemption period end date (dd/mm/yyyy).

Note: After the last day of the specified redemption end date, the cards for this promotion will be auto-deactivated regardless of their card balance.

11. Go to the "Promotion Card Images" area (shown below) and upload the image(s) that you want to feature on promotional eGift cards for this promotion:

Note: The same card image will be featured on all promotional cards issued for this promotion regardless of whether customers submit their eGift card orders through the English or French deployment of the Moneris eGift iFrame.

Important! Please ensure the image(s) that you want to upload are formatted according to the specifications outlined in Image file specifications (page 19).
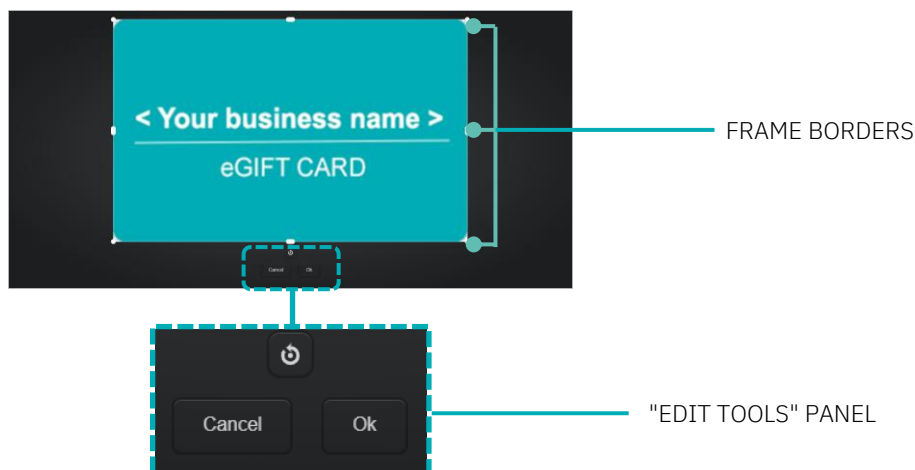

EMPTY IMAGE PLACEHOLDER

To upload an image using "drag-and-drop":

a. Locate the desired image (**JPEG**, **PNG** or **GIF** file type) on your drive.

b. Drag the image file over the "eGift Card Images" placeholder (shown above), and release the image.

To upload an image using file manager dialog:

a. Click on the "eGift Card Images" placeholder (shown above) to launch your device's file manager dialog.

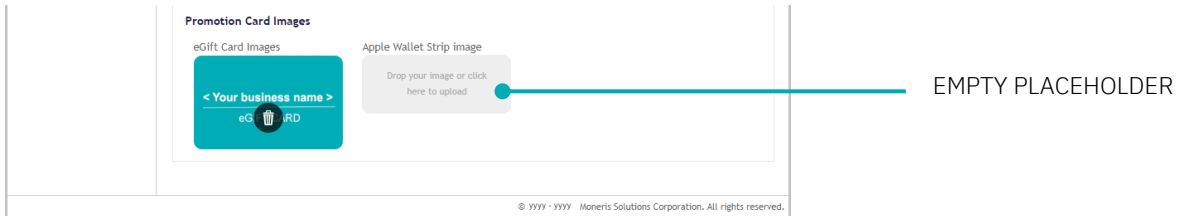b. Locate the desired image (**JPEG**, **PNG** or **GIF** file type), and click on it.

c. When the preview image displays (shown below), do any of the following:

FRAME BORDERS

"EDIT TOOLS" PANEL

— To rotate the image, go to the "edit tools" panel, and click on the **Rotate** ⟳ button until you achieve the desired orientation.

— To proceed with this image, click on the **Ok** button.

d. Upload the Apple Wallet version of the image to the "Apple Wallet Strip image" placeholder (shown below).

Note: *To upload the image, click on the "Apple Wallet Strip image" placeholder, and use the same upload methods from the previous steps.*

Promotion Card Images

eGift Card Images   Apple Wallet Strip image

< Your business name >
eG🗑RD

Drop your image or click here to upload

————————————— EMPTY PLACEHOLDER

12. When you are finished, click on the **Submit** button to save your settings and activate the promotion.

13. When the "Successfully created the promotion" response displays, the operation is complete.

Note: *If necessary, you may subsequently update one or more of the promotion's parameters or force-stop the promotion even if it is already active (see Promotion configuration options: starting, updating, or ending a promotion on page 26).*

Updating a scheduled promotion

The steps below describe how to update the parameters of a promotion[9] that is scheduled to start on a future date (i.e., a date other than today). Because the promotion is not yet live (and consequently no promotional cards are activated/issued), you may update all the promotion's parameters, including threshold, card value, and card quota; card image; descriptive details; start and end date; and redemption period.

Important! Although you are updating a promotion that is not yet live, please ensure that you update all related marketing to match any edits that you make here. You, the merchant, are solely liable for ensuring that your promotion is aligned with your advertisements.

1. Log into the Client Portal (see Logging into the Client Portal on page 67).

2. When the homepage displays (shown below), click on **Card Management** in the menu bar.
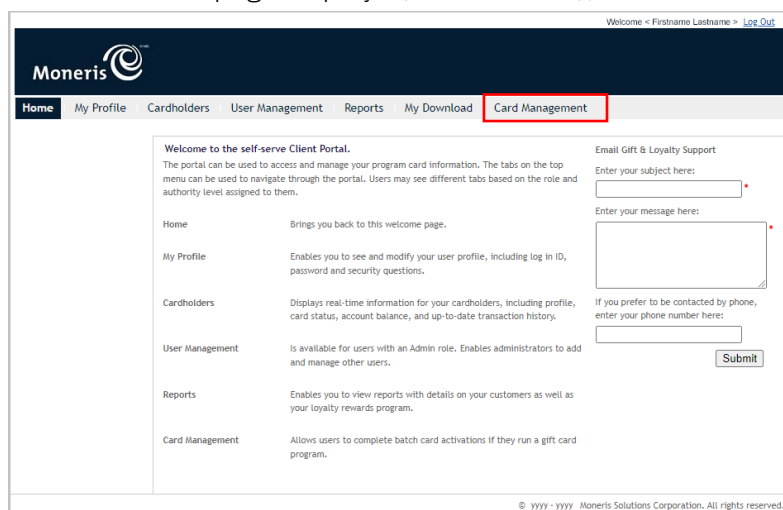
3. When the "Actions" navigation pane displays (shown below), click on **eGift Program Management**.

---

[9] For more information about how a promotion works, see Promotional eGift card feature (page 24).

4. When the "eGift Program List" page displays (shown below), click on the program ID of the eGift card program for which you want to update a promotion.
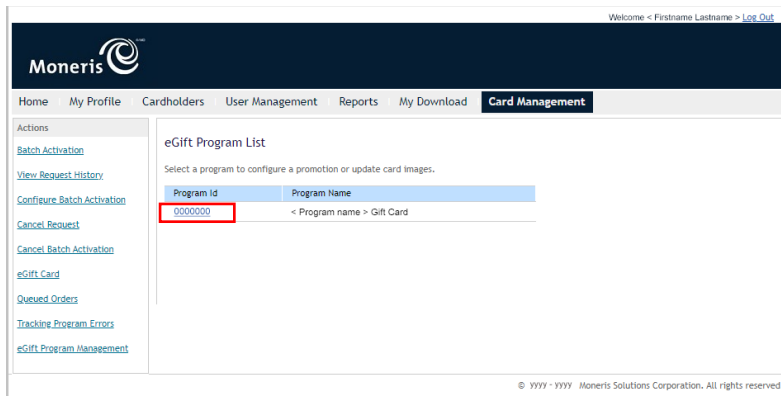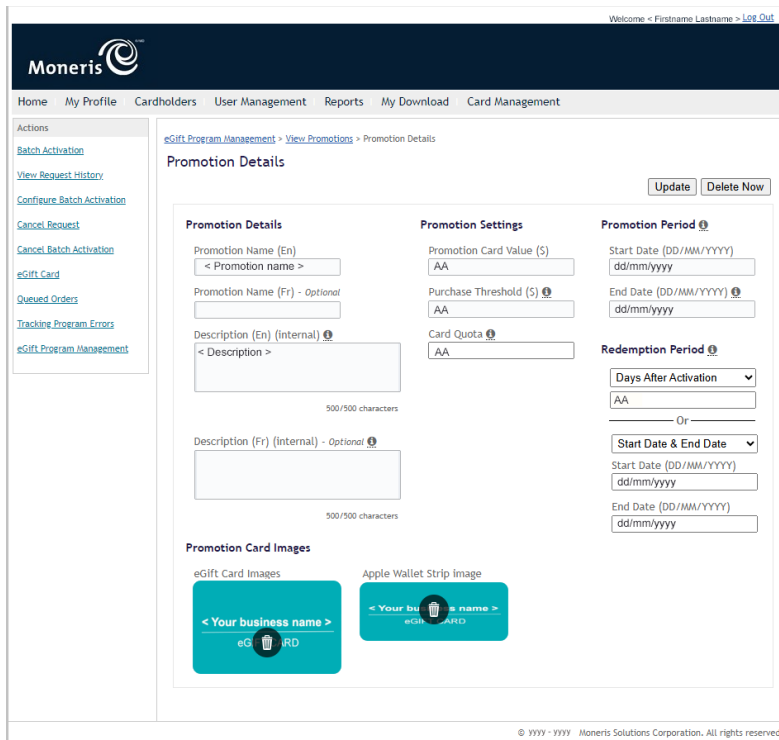

5. When the "Promotions - < your program ID >" page displays (shown below), locate the "Scheduled" promotion that you want to update, and click on its **View** hyperlink under the "Actions" column.

    Note: Scheduled, active, and expired promotions are listed by "Start Date" (yyyy-mm-dd; hh:mm AM/PM), "End Date"(yyyy-mm-dd; hh:mm AM/PM), "Threshold Value" (qualifying eGift card purchase amount), "Card Value" (amount loaded on every promotional card), "Cards Issued" (number of cards issued for during this promotion), "Cards Remaining" (number of cards remaining from card quota), and "Status" ("Expired", "Active", or "Scheduled").
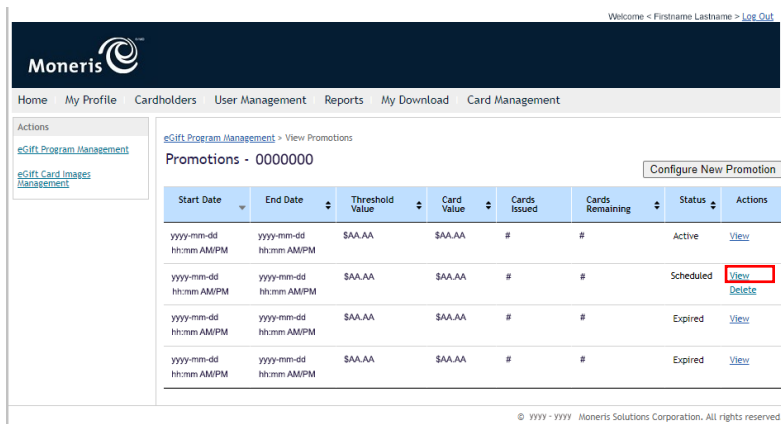
If the up/down ⬍ icon displays beside a header, you can click on the icon to re-sort the list in ascending/descending order.

6. When the "Promotion Details" page displays (shown below), update one or more of the promotion parameters as described in the following steps (continue from step 7 to step 15 of this procedure).

7. To edit one or more descriptive details for the promotion, do the following:

   a. Go to the "Promotion Details" area (shown above), and revise any of the descriptive details:

      ▪ In the **Promotion Name (En)** field, enter the promotion name in English.
      ▪ In the **Promotion Name (Fr)** field, optionally enter the promotion name in French.
      ▪ In the **Description (En) (internal)** field, enter the promotion description in English.
      ▪ In the **Description (Fr) (internal)** field, optionally enter the promotion description in French.

8. To set a new qualifying threshold, card value, and/or card quota for the promotion, do the following:

   a. Go to the "Promotion Settings" area (shown above), and:

      ▪ In the **Promotion Card Value ($)** field, enter the dollar amount to load on any eGift card that is sent as part of this promotion.
      ▪ In the **Purchase Threshold ($)** field, enter the purchase amount (i.e., for one eGift card item) that must be equalled or exceeded to qualify a purchaser to receive an eGift card for this promotion.[10]
      ▪ In the **Card Quota** field, enter the maximum number of eGift cards that you want to be made available as part of this promotion (e.g., if your promotional budget is $2000, and you are offering $10 promotional eGift cards, you would enter "200" into this field to limit the number of promotional eGifts to match your budget).[11]

---

[10] The purchaser would receive a free promotional eGift card for each qualifying item that they included in their order.

[11] A buffer of 25 promotions eGift cards will be available for this promotion over and above the maximum number of cards that you set. The buffer cards will be used under these conditions: 1) if multiple qualifying orders are queued that deplete your inventory of promotion cards; or 2) if an individual order qualifies for multiple promotion cards that exceed the quantity of available promotion cards.

9. To set a new start date for the promotion, [12] do the following:

   a. Go to the "Promotion Period" area (shown on previous page), and click on the **Start Date** field.

   b. Select the promotion's new start date (dd/mm/yyyy).

10. To set a new end date for the promotion, [13] do the following:

    a. Go to the "Promotion Period" area (shown on previous page), and click on the **End Date** field.

    b. Select the promotion's new end date (dd/mm/yyyy).

11. To set a new redemption period for the promotion, do the following:

    a. Go to the "Redemption Period" area (shown on previous page), and set the new date range during which the promotional cards will be redeemable at your point of sale.[14] You have two options:

    Option 1: To set the redemption period based on card activation date:

    ▪ Select **Days After Activation**. Then, click on the corresponding field, and enter the number of days the card should remain active following card activation.

    Note: Card activation occurs on the date that the order is approved (auto-approved or manually approved). We send the promotional card to the purchaser via their notification on the same day as card activation.

    Option 2: To set a redemption period start date and end date independent of card activation date:

    ▪ Select **Start Date & End Date**. Then, click on the **Start Date** field, and select a redemption period start date (dd/mm/yyyy).[15] Then, click on the **End Date** field, and select a redemption period end date (dd/mm/yyyy). [16]

12. To feature a new image on the promotional card, do the following:

    a. Go to the "Promotion Card Images" area (shown below).

---
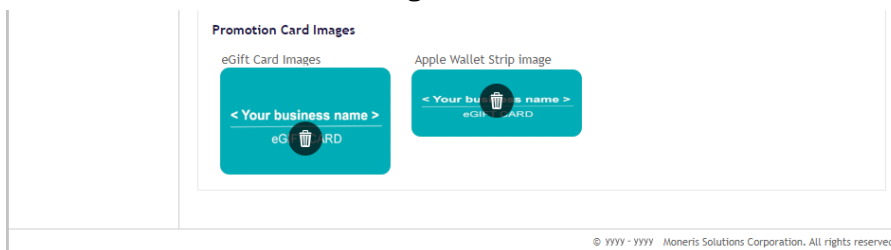
[12] When the promotion is active, it will be advertised on your Moneris eGift iFrame (see <u>Placing an order</u> on page 57).

[13] When the promotion is active, it will be advertised on your Moneris eGift iFrame (see <u>Placing an order</u> on page 57).

[14] Once the redemption period passes for a promotional eGift card, we deactivate the card regardless of the remaining balance.

[15][15] The start date must be on or after the promotion activation date (defined in step 9 of this procedure).

[16] After the last day of the specified redemption end date, the cards for this promotion will be auto-deactivated regardless of their card balance.

b. Click on the **Remove** 🗑 icon for the "eGift Card Images" image.
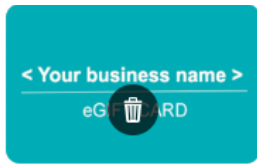
c. Wait while the request is processed.

d. When the card image is deleted, only its empty image placeholder remains (shown below).

EMPTY IMAGE PLACEHOLDER

e. Repeat steps 12a. to 12d. to delete the currently uploaded "Apple Wallet Strip image".

f. When you are finished, upload a new card image by doing the following:

Note: The same card image will be featured on all promotional cards issued for this promotion regardless of whether customers submit their eGift card orders through the English or French deployment of the Moneris eGift iFrame.

Important! Please ensure the image(s) that you want to upload are formatted according to the specifications outlined in <u>Image file specifications</u> (page 19).

To upload an image using "drag-and-drop":

i. Locate the desired image (**JPEG**, **PNG** or **GIF** file type) on your drive.

ii. Drag the image file over the "eGift Card Images" placeholder (shown above), and release the image.

To upload an image using file manager dialog:

i. Click on the "eGift Card Images" placeholder (shown above) to launch your device's file manager dialog.

ii. Locate the desired image (**JPEG**, **PNG** or **GIF** file type), and click on it.

iii. When the preview image displays (shown below), do any of the following:

FRAME BORDERS

"EDIT TOOLS" PANEL

— To rotate the image, go to the "edit tools" panel, and click on the **Rotate** button until you achieve the desired orientation.

— To proceed with this image, click on the **Ok** button.

iv. Upload the Apple Wallet version of the image to the "Apple Wallet Strip image" placeholder (shown below).

> *Note:* *To upload the image, click on the "Apple Wallet Strip image" placeholder, and use the same upload methods from the previous steps.*

Promotion Card Images

eGift Card Images

Apple Wallet Strip image

Drop your image or click here to upload

< Your business name >

eG   RD

— EMPTY IMAGE PLACEHOLDER

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13. When you are finished updating the parameters of the promotion, click on the **Update** button.

14. When the "Update Promotion" dialog displays (shown below), click on its **Yes** button.

Update Promotion

Are you sure you want to update this promotion?

Promotion will be updated immediately

Yes   No
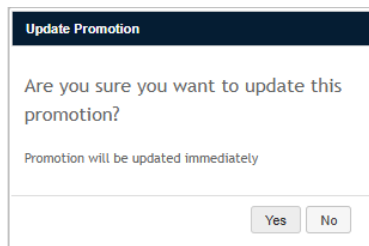
15. When the "Promotion updated successfully" response displays, the operation is complete.

Updating an active promotion: promotional cards activated - no

The steps below describe how to update the parameters of a live promotion[17] that has started but for which no promotional cards have been activated (issued).[18] Except for the promotion start date, you may update all the promotion's other parameters, including threshold, card value, and card quota (increase only); card image; descriptive details; end date; and redemption period.

Note: If you are dissatisfied with the promotion start date or you wish to decrease the card quota, then end this promotion now (see Force-stopping/ending a promotion on page 50). You may then start a new promotion that you can configure with the desired parameters (see Configuring a new promotion on page 27).

Important! You are updating a promotion that is already live. Please ensure that you update all your related marketing to match any edits that you make here. You, the merchant, are solely liable for ensuring that your promotion is aligned with your advertisements.

1. Log into the Client Portal (see Logging into the Client Portal on page 67).

2. When the homepage displays (shown below), click on **Card Management** in the menu bar.

3. When the "Actions" navigation pane displays (shown below), click on **eGift Program Management**.

---

[17] For more information about how a promotion works, see Promotional eGift card feature (page 24).
[18] If no card is activated during the active promotion period, it means an eGift card order has not yet been processed through your store's Moneris eGift iFrame for a dollar amount that would qualify a purchaser to receive one or more promotional cards.

4. When the "eGift Program List" page displays (shown below), click on the program ID of the eGift card program for which you want to update a promotion.
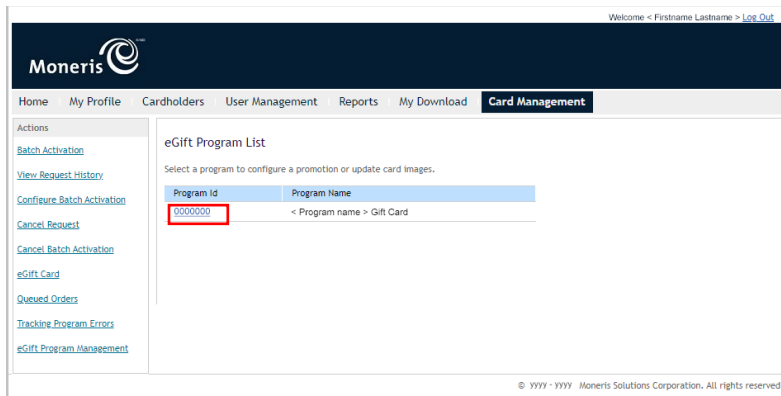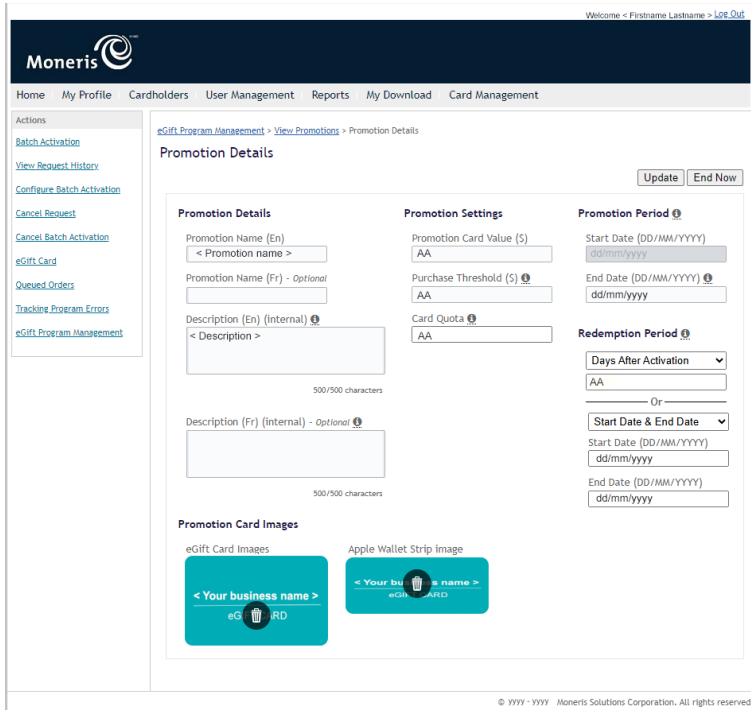
5. When the "Promotions - < your program ID >" page displays (shown below), locate the "Active" promotion that you want to update (the promotion's "Cards Issued" value will indicate "0"), and then click on its **View** hyperlink under the "Actions" column.

   Note: Active and expired promotions are listed by "Start Date" (yyyy-mm-dd; hh:mm AM/PM), "End Date"(yyyy-mm-dd; hh:mm AM/PM), "Threshold Value" (qualifying eGift card purchase amount), "Card Value" (amount loaded on every promotional card), "Cards Issued" (number of cards issued for during this promotion), "Cards Remaining" (number of cards remaining from card quota), and "Status" ("Expired", "Active", or "Scheduled").
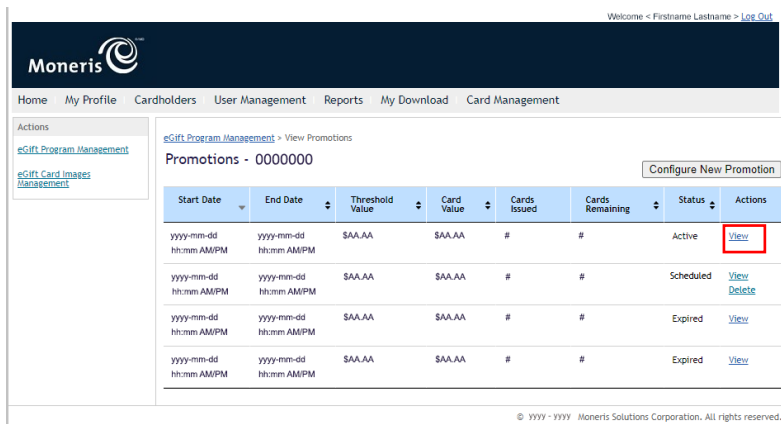
If the up/down ⬍ icon displays beside a header, you can click on the icon to re-sort the list in ascending/descending order.

6. When the "Promotion Details" page displays (shown below), update one or more of the promotion parameters as described in the following steps (continue from step 7 to step 14 of this procedure).

7. To edit one or more descriptive details for the promotion, do the following:

    a. Go to the "Promotion Details" area (shown above), and revise any of the descriptive details:

        ▪ In the **Promotion Name (En)** field, enter the promotion name in English.
        ▪ In the **Promotion Name (Fr)** field, optionally enter the promotion name in French.
        ▪ In the **Description (En) (internal)** field, enter the promotion description in English.
        ▪ In the **Description (Fr) (internal)** field, optionally enter the promotion description in French.

8. To set a new qualifying threshold, card value, and/or card quota (increase only) for the promotion, do the following:

    a. Go to the "Promotion Settings" area (shown above), and:

        ▪ In the **Promotion Card Value ($)** field, enter the dollar amount to load on any eGift card that is sent as part of this promotion.
        ▪ In the **Purchase Threshold ($)** field, enter the purchase amount (i.e., for one eGift card item) that must be equalled or exceeded to qualify a purchaser to receive an eGift card for this promotion.[19]
        ▪ In the **Card Quota** field, enter the maximum number of eGift cards that you want to be made available as part of this promotion (e.g., if your promotional budget is $2000, and you are offering $10 promotional eGift cards, you would enter "200" into this field to limit the number of promotional eGifts to match your budget).[20]

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[19] The purchaser would receive a free promotional eGift card for each qualifying item that they included in their order.

[20] A buffer of 25 promotions eGift cards will be available for this promotion over and above the maximum number of cards that you set. The buffer cards will be used under these conditions: 1) if multiple qualifying orders are queued that deplete your inventory of promotion cards; or 2) if an individual order qualifies for multiple promotion cards that exceed the quantity of available promotion cards.

9. To set a new end date for the promotion, [21] do the following:

    a. Go to the "Promotion Period" area (shown on previous page), and click on the **End Date** field.

    b. Select the promotion's new end date (dd/mm/yyyy).

10. To set a new redemption period for the promotion, do the following:

    a. Go to the "Redemption Period" area (shown on previous page), and set the new date range during which the promotional cards will be redeemable at your point of sale.[22] You have two options:

        Option 1: To set the redemption period based on card activation date:

        ▪ Select **Days After Activation**. Then, click on the corresponding field, and enter the number of days the card should remain active following card activation.

        Note: Card activation occurs on the date that the order is approved (auto-approved or manually approved). We send the promotional card to the purchaser via their notification on the same day as card activation.

        Option 2: To set a redemption period start date and end date independent of card activation date:

        ▪ Select **Start Date & End Date**. Then, click on the **Start Date** field, and select a redemption period start date (dd/mm/yyyy).[23] Then click on the **End Date** field, and select a redemption period end date (dd/mm/yyyy). [24]

11. To feature a new image on the promotional card, do the following:

    a. Go to the "Promotion Card Images" area (shown below).

    b. Click on the "eGift Card Images" image's **Remove** 🗑 icon.

![Moneris logo]

c. Wait while the request is processed.

d. When the card image is deleted, only its empty image placeholder remains (shown below).

EMPTY IMAGE PLACEHOLDER

e. Repeat steps 11a. to 11d. to delete the currently uploaded "Apple Wallet Strip image".

f. When you are finished, upload a new card image by doing the following:

Note: The same card image will be featured on all promotional cards issued for this promotion regardless of whether customers submit their eGift card orders through the English or French deployment of the Moneris eGift iFrame.

Important! Please ensure the image(s) that you want to upload are formatted according to the specifications outlined in Image file specifications **(page 19).**

To upload an image using "drag-and-drop":

i. Locate the desired image (**JPEG**, **PNG** or **GIF** file type) on your drive.

ii. Drag the image file over the "eGift Card Images" placeholder (shown above), and release the image.

To upload an image using file manager dialog:

i. Click on the "eGift Card Images" placeholder (shown below) to launch your device's file manager dialog.

ii. Locate the desired image (**JPEG**, **PNG** or **GIF** file type), and click on it.

iii. When the preview image displays (shown below), do any of the following:

FRAME BORDERS

"EDIT TOOLS" PANEL

— To rotate the image, go to the "edit tools" panel, and click on the **Rotate** [icon] button until you achieve the desired orientation.
— To proceed with this image, click on the **Ok** button.

iv. Upload the Apple Wallet version of the image to the "Apple Wallet Strip image" placeholder (shown below).

> *Note:* *To upload the image, click on the "Apple Wallet Strip image" placeholder, and use the same upload methods from the previous steps.*

12. When you are finished updating the parameters of the promotion, click on the **Update** button.

13. When the "Update Promotion" dialog displays (shown below), click on its **I understand, proceed with update** button.
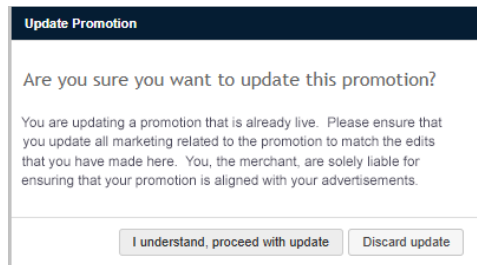
14. When the "Promotion updated successfully" response displays, the operation is complete.

Updating an active promotion: promotional cards activated - yes

The steps below describe how to update select parameters of a live promotion[25] that has already started for which one or more promotional cards have already been activated (issued).[26] Updatable promotion parameters include card image, descriptive details, card quota (increase only), and promotion end date only.

Note: If you want to update the promotion card value, threshold, redemption period end date, or number of redemption days after card activation, then end this promotion now (see Force-stopping/ending a promotion on page 50). You may then start a new promotion that you can configure with the desired parameters (see Configuring a new promotion on page 27).

Important! You are updating a promotion that is already live. Please ensure that you update all your related marketing to match any edits that you make here. You, the merchant, are solely liable for ensuring that your promotion is aligned with your advertisements.

1. Log into the Client Portal (see Logging into the Client Portal on page 67).

2. When the homepage displays (shown below), click on **Card Management** in the menu bar.

3. When the "Actions" navigation pane displays (shown below), click on **eGift Program Management**.

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[25] For more information about how a promotion works, see Promotional eGift card feature (page 24).

[26] When a promotional card is activated (i.e., it is in circulation), it means during the active period of this promotion, an eGift card order was processed through your store's Moneris eGift iFrame for a dollar amount that qualified the purchaser to receive one or more promotional cards.

4. When the "eGift Program List" page displays (shown below), click on the program ID of the eGift card program for which you want to update a promotion.
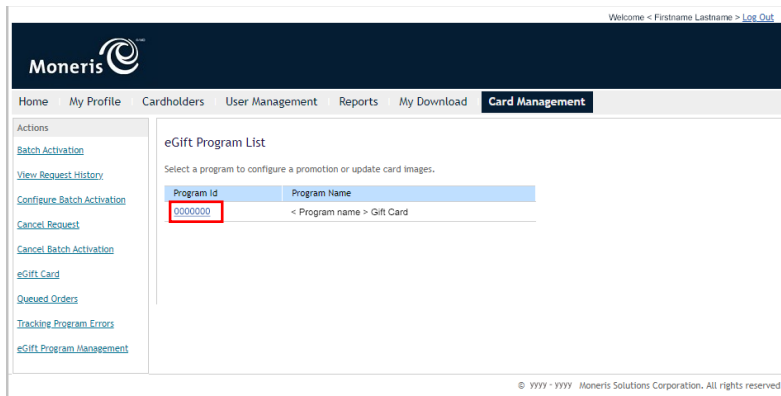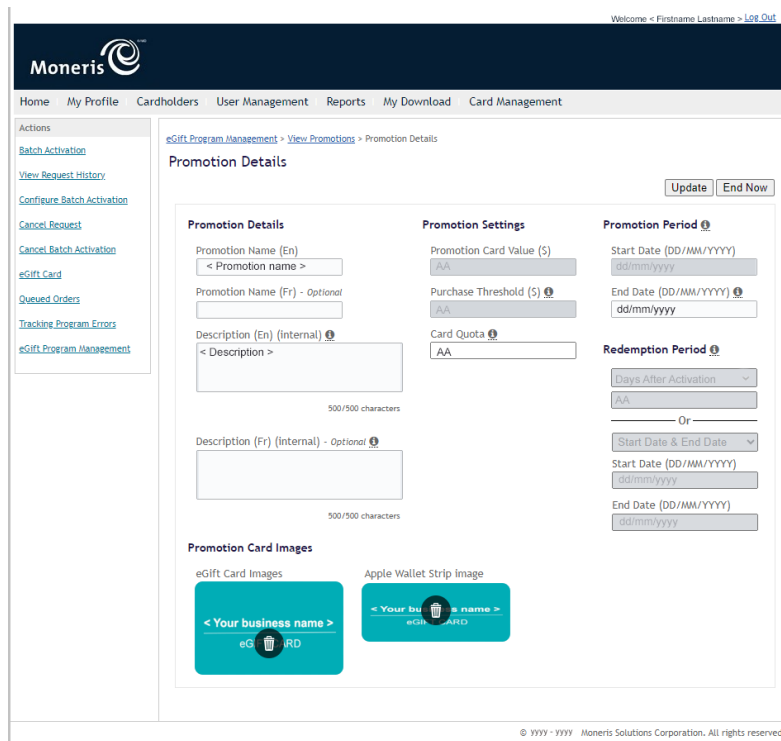
5. When the "Promotions - < your program ID >" page displays (shown below), locate the "Active" promotion that you want to update (the promotion's "Cards Issued" value will indicate "1" or greater), and then click on its **View** hyperlink under the "Actions" column.

Note: Active, expired, and scheduled promotions are listed by "Start Date" (yyyy-mm-dd; hh:mm AM/PM), "End Date"(yyyy-mm-dd; hh:mm AM/PM), "Threshold Value" (qualifying eGift card purchase amount), "Card Value" (amount loaded on every promotional card), "Cards Issued" (number of cards issued for during this promotion), "Cards Remaining" (number of cards remaining from card quota), and "Status" ("Expired", "Active", or "Scheduled").
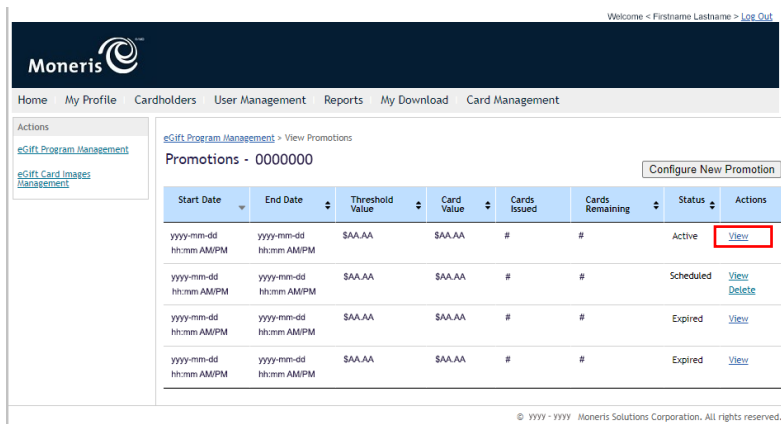
If the up/down ⬍ icon displays beside a header, you can click on the icon to re-sort the list in ascending/descending order.

6. When the "Promotion Details" page displays (shown below), update one or more of the updatable promotion parameters as described in the following steps (continue from step 7 to step 13 of this procedure).

7. To edit one or more descriptive details for the promotion, do the following:

   a. Go to the "Promotion Details" area (shown above), and revise any of the descriptive details:

      - In the **Promotion Name (En)** field, enter the promotion name in English.
      - In the **Promotion Name (Fr)** field, optionally enter the promotion name in French.
      - In the **Description (En) (internal)** field, enter the promotion description in English.
      - In the **Description (Fr) (internal)** field, optionally enter the promotion description in French.

8. To increase the card quota for the promotion, do the following:

   a. Go to the "Promotion Settings" area (shown above).

   b. In the **Card Quota** field, enter the maximum number of eGift cards that you want to be made available as part of this promotion (e.g., if your promotional budget is $2000, and you are offering $10 promotional eGift cards, you would enter "200" into this field to limit the number of promotional eGifts to match your budget).[27]

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[27] A buffer of 25 promotions eGift cards will be available for this promotion over and above the maximum number of cards that you set. The buffer cards will be used under these conditions: 1) if multiple qualifying orders are queued that deplete your inventory of promotion cards; or 2) if an individual order qualifies for multiple promotion cards that exceed the quantity of available promotion cards.

9. To set a new end date for the promotion, [28] do the following:

    a. Go to the "Promotion Period" area (shown on previous page), and click on the **End Date** field.

    b. Select the promotion's new end date (dd/mm/yyyy).

       Note: You cannot select a date before today's date.

10. To feature a new image on the promotional card, do the following:

    a. Go to the "Promotion Card Images" area (shown below).
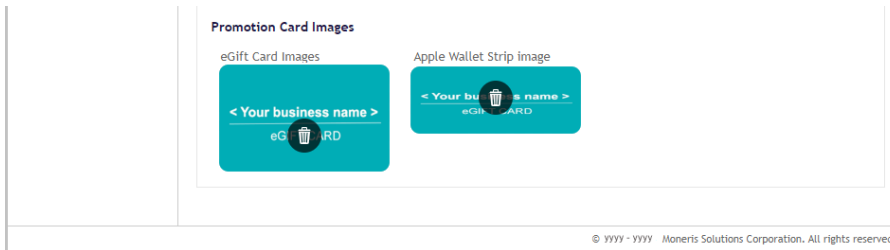
    b. Click on the "eGift Card Images" image's **Remove** 🗑 icon.

    c. Wait while the request is processed.
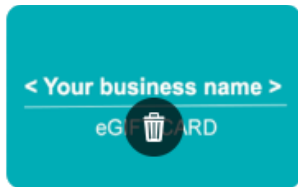
    d. When the card image is deleted, only its empty image placeholder remains (shown below).

EMPTY IMAGE PLACEHOLDER
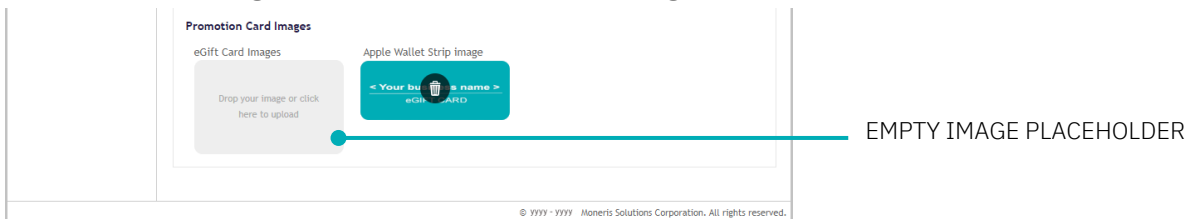
    e. Repeat steps 10a to 10d to delete the currently uploaded "Apple Wallet Strip image".

---

[28] When the promotion is active, it will be advertised on your Moneris eGift iFrame (see Placing an order on page 57).

f. When you are finished, upload a new card image by doing the following:

Note: *The same card image will be featured on all promotional cards issued for this promotion regardless of whether customers submit their eGift card orders through the English or French deployment of the Moneris eGift iFrame.*

Important! Please ensure the image(s) that you want to upload are formatted according to the specifications outlined in <u>Image file specifications</u> (page 19).

To upload an image using "drag-and-drop":

i. Locate the desired image (**JPEG**, **PNG** or **GIF** file type) on your drive.

ii. Drag the image file over the "eGift Card Images" placeholder (shown above), and release the image.

To upload an image using file manager dialog:

i. Click on the "eGift Card Images" placeholder (shown below) to launch your device's file manager dialog.

ii. Locate the desired image (**JPEG**, **PNG** or **GIF** file type), and click on it.

iii. When the preview image displays (shown below), do any of the following:

FRAME BORDERS

"EDIT TOOLS" PANEL

— To rotate the image, go to the "edit tools" panel, and click on the **Rotate** ⟳ button until you achieve the desired orientation.
— To proceed with this image, click on the **Ok** button.

iv. Upload the Apple Wallet version of the image to the "Apple Wallet Strip image" placeholder (shown below).

Note: *To upload the image, click on the "Apple Wallet Strip image" placeholder, and use the same upload methods from the previous steps.*

EMPTY IMAGE PLACEHOLDER

11. When you are finished updating the parameters of the promotion, click on the **Update** button.

12. When the "Update Promotion" dialog displays (shown below), click on its **I understand, proceed with update** button.
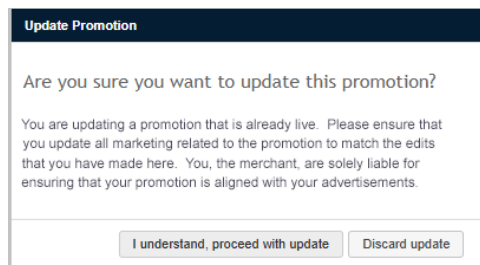
13. When the "Promotion updated successfully" response displays, the operation is complete.

Force-stopping/ending a promotion

The steps below describe how to force-stop (end) a scheduled or active promotion[29] prior to its configured end date.

Note: Any promotional cards that are issued during this promotion's period of activity will still be redeemable until they have expired per the redemption period set for this promotion.

1. Log into the Client Portal (see <u>Logging into the Client Portal</u> on page 67).

2. When the homepage displays (shown below), click on **Card Management** in the menu bar.
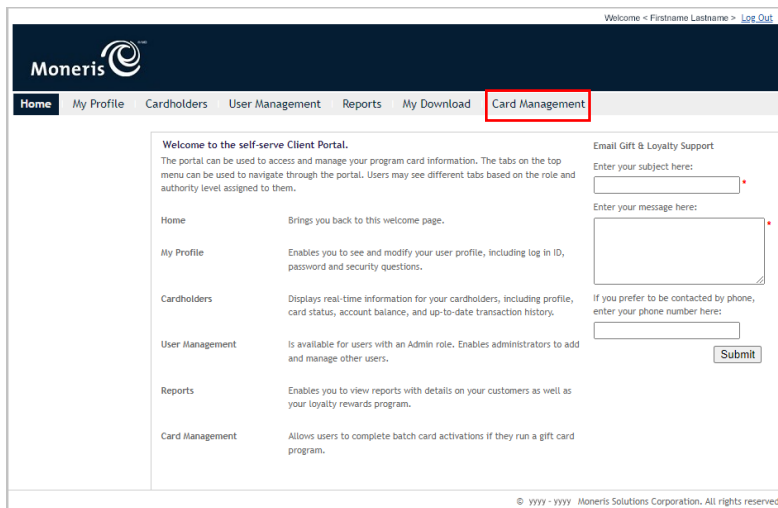
3. When the "Actions" navigation pane displays (shown below), click on **eGift Program Management**.

---
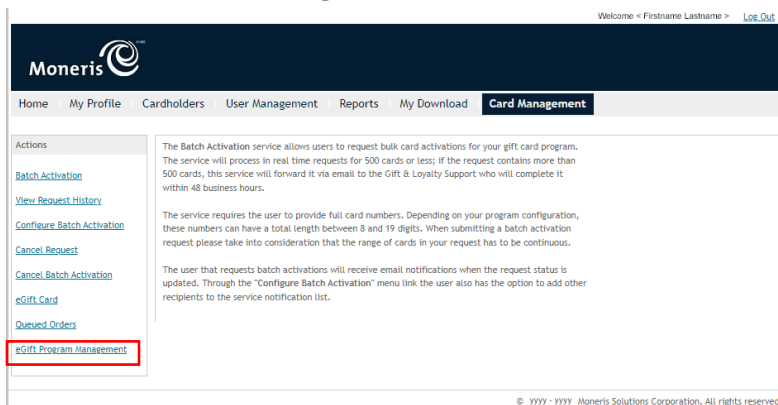
[29] For more information about how a promotion works, see <u>Promotional eGift card feature</u> (page 24).

4. When the "eGift Program List" page displays (shown below), click on the program ID of the eGift card program for which you want to update a promotion.
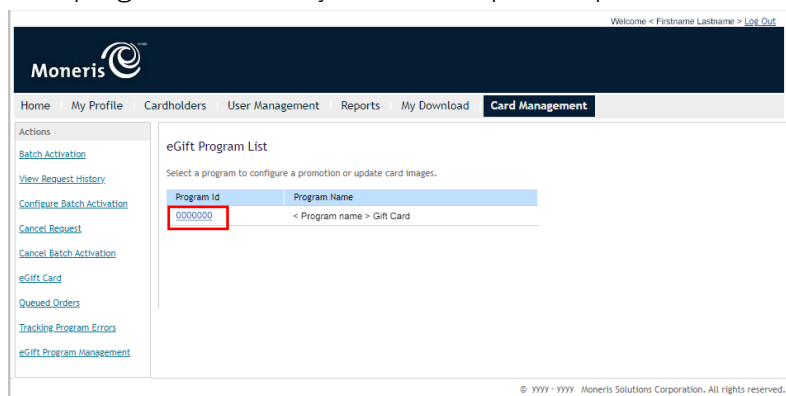
5. When the "Promotions - < your program ID >" page displays (shown below), locate the "Active" or "Scheduled" promotion that you want to end, and click on its **View** hyperlink.
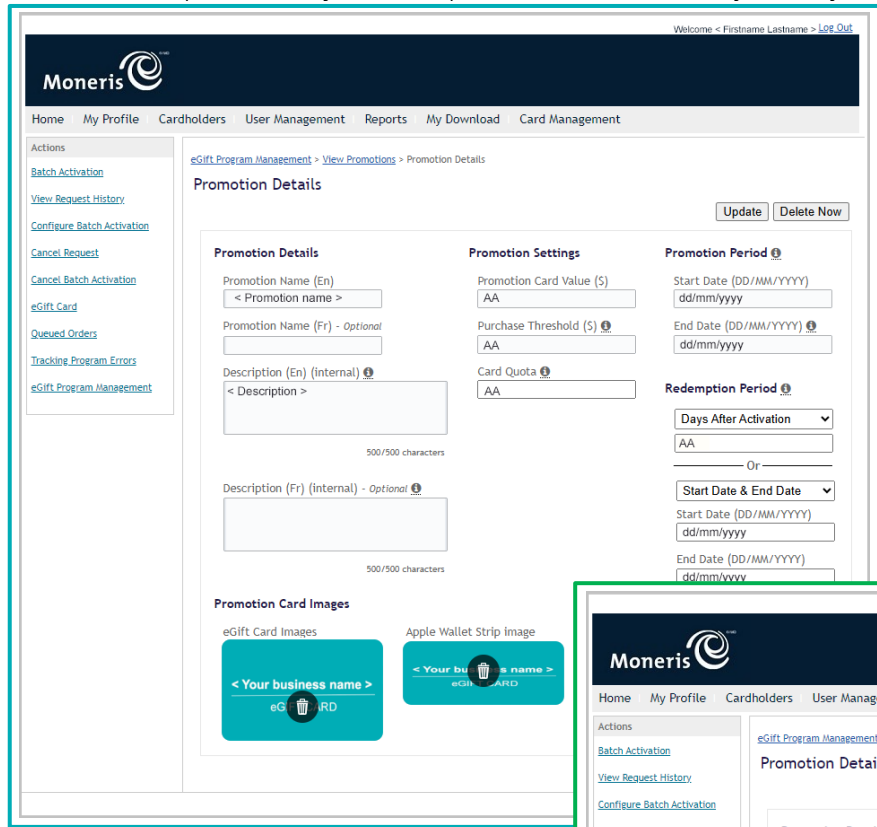
   Note: *You may have one or more promotions listed on your page.*
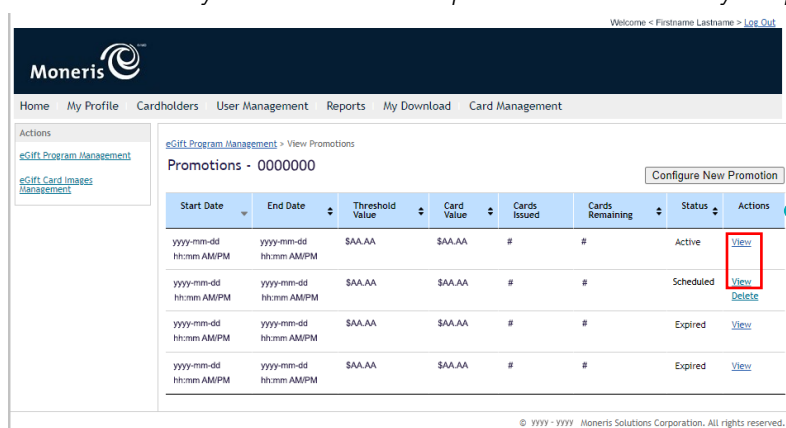
If the up/down ⬍ icon displays beside a header, you can click on the icon to re-sort the list in ascending/descending order.
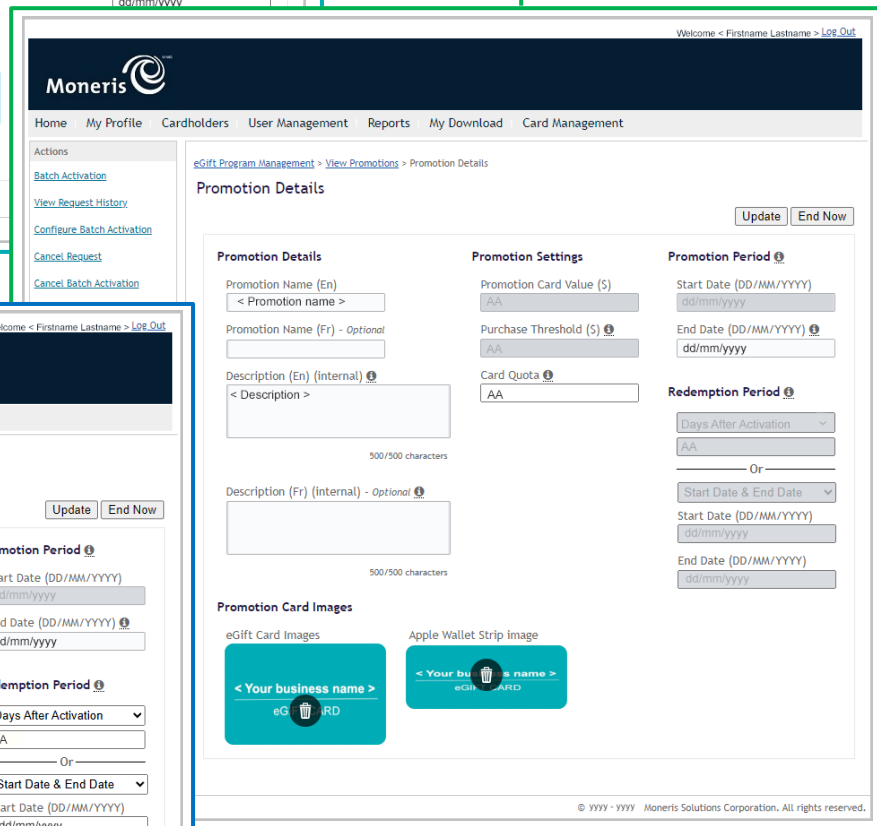
6. When the "Promotion Details" page displays (shown below), do one of the following:

Note: *This may be a scheduled promotion (i.e., no promotional cards are activated/issued), or it may be an active promotion for which promotional cards may or may not be activated/issued.*
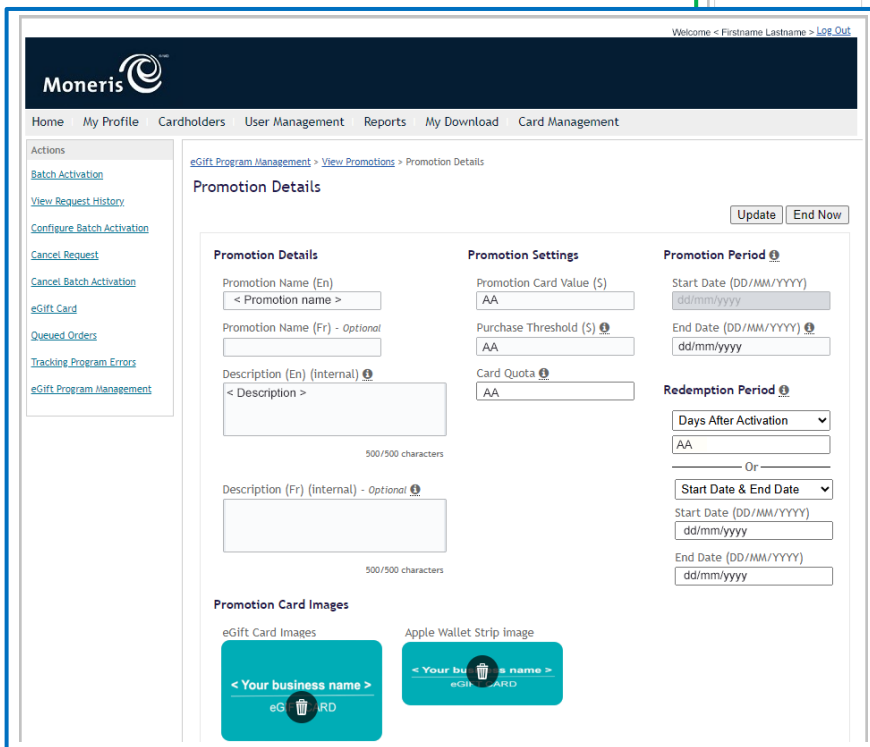
SCHEDULED PROMOTION -
PROMOTIONAL CARD(S) ACTIVATED/ISSUED: NO

ACTIVE PROMOTION -
PROMOTIONAL CARD(S) ACTIVATED/ISSUED: YES

ACTIVE PROMOTION -
PROMOTIONAL CARD(S) ACTIVATED/ISSUED: NO

If the promotion has the status "Scheduled" (cards activated/issued: no):

a. Click on the **Delete Now** button.

b. When the "Delete" promotion dialog displays, click on its **Yes** button.

Delete Promotion

Are you sure you want to delete this promotion?

This will delete the promotion immediately

Yes   No
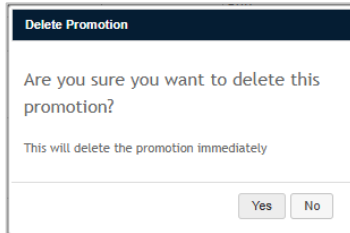
c. When the "Promotion deleted successfully" response displays, the operation is complete.

Note: *When your screen refreshes back to the "Promotions - < your program ID >" page, the promotion that you just force-stopped will no longer be listed.*

If the promotion has the status "Active" (cards activated/issued: yes or no):

a. Click on the **End Now** button.

b. When the "End Promotion" dialog displays (shown below), click on its **Yes** button.

End Promotion

Are you sure you want to end this promotion?

This will end the promotion immediately. The earliest that a new promotion may begin is tomorrow.

Yes   No
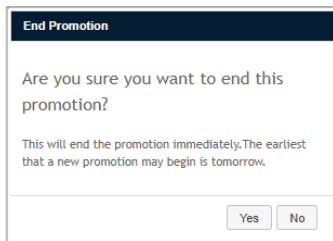
d. When the "Promotion ended successfully" response displays, the operation is complete.

Note: *When your screen refreshes back to the "Promotions - < your program ID >" page, the promotion that you just force-stopped will now indicate an "Expired" status.*

Shopping for eGift cards.

In this section, we go over everything you need to know regarding how your customers place their eGift card orders through the Moneris eGift iFrame, including any actions you may be required to take to ensure a successful order fulfillment.

The order process described

This section below describes in detail each phase of the eGift card order process from the point at which the customer accesses your Moneris eGift iFrame to the point at which the recipient receives their eGift card.

1. The purchaser adds one or more items to their shopping cart and submits their order through the Moneris eGift iFrame (for details, see).

2. We immediately send the purchaser's debit/credit card data through the Moneris Gateway to be processed as a Preauthorization transaction, which will lock the funds until the order is approved or rejected.

3. The purchaser waits for the Moneris eGift iFrame to display a confirmation response:

"Order Placed!" confirmation response:

If the "Order Placed!" confirmation response displays (shown below), it means the we successfully processed an approved Preauthorization, and we will allow the order to proceed to the next phase in the order process (continue at step 4 below).

— Response text:
"Order Placed! Status updates for this order will be sent to < purchaser@domain.com >.

— Optional user action:
The purchaser can submit another order by clicking on the **Buy another gift card** button (continue at).

"Payment Declined" dialog:

If the "Payment Declined" dialog displays (shown below), it means we could not process an approved Preauthorization with the purchaser's debit/credit card and/or billing details.

— Dialog text:
"Payment Declined: We are unable to process your order. Please ensure your payment information, including your billing address, is correct and try again."

— Optional user action:
The purchaser can click on the dialog's "Close" **X** icon, whereupon the Moneris eGift iFrame returns to the "Billing" page so that the purchaser can re-enter their billing details and re-submit their order (see).

4. We auto-approve the order and complete it, or we route the order to the queue for pending review:

If the order is auto-approved/manually approved:

a. We process a Completion (Capture) transaction to close the Preauthorization and release the funds for settlement.[30]

b. We send an order summary/receipt notification to the purchaser:

- If order is auto-approved, we send the <u>"Thank you for shopping with us!": order summary notification</u> (see page 89).

- If the order is manually approved, we send the <u>"Thank you for shopping with us!": order approved notification</u> (page 88).

c. If one or more items in the order qualifies the purchaser to receive a promotional eGift card,[31] we send them a <u>"Thank you for your purchase" notification</u> (see page 90), which contains a link to their card.

d. Per the delivery date specified in the order, we send a <u>"Recipient, you've received a $AA eGift Card!" notification</u> (see page 91) to the eGift card recipient(s).[32] The notification contains a link to their card.

Note: See also <u>*"Order Details" page: processed order*</u> *(page 116).*

If we route the order to the queue:

Note: *Routing occurs if the order purchase equals or exceeds the purchase amount threshold set for your program (see <u>Purchase amount threshold</u> on page 95).*

a. We send a <u>"Pending Order"</u> notification (see page 83) to you/administrator users to inform you about the newly queued order.

b. We send a <u>"Thank you for shopping with us!": order pending review notification</u> (see page 87) to the eGift card purchaser to inform them about the status of the order.

c. You/your administrator users must access the Client Portal and manually approve or reject the order (see <u>Viewing queued eGift card orders</u> on page 96):

- If you approve the order, continue in <u>If the order is auto-approved/manually approved</u> above.

- If you reject the order:

  i. We release the locked funds by processing a zero-dollar Completion (Capture) transaction, which cancels the original Preauthorization.

  ii. We send the <u>"Order Cannot Be Completed" notification</u> (see page 86) to the purchaser to inform them that we could not complete their order.

  Note: See also <u>*"Order Details" page: rejected order*</u> *(page 120).*

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[30] The Completion (Capture) transaction is the equivalent of a Purchase transaction and is used to fund the non-promotional eGift cards in the order.

[31] A promotion must be active for your eGift card program (see <u>Promotional eGift card feature</u> on page 24).

[32] The actual delivery date will be extended if the order sat in the queue past the delivery date.

Placing an order

The steps below describe what a customer (purchaser) needs to do to place an eGift card order.

Note: *Placing an order is the first phase in the overall order process (see The order process described on page 55).*

Launching the sub-page[33] containing the Moneris eGift iFrame

The purchaser clicks on the HTML hyperlink on your ecommerce site to launch the sub-page containing the embedded Moneris eGift iFrame (shown below).

The "PROMOTION" panel displays if a promotion is active for your eGift card program (see Promotional eGift card feature on page 24).

Customizing the card

In the "Customize your gift card" panel (shown here), the purchaser does the following:

1. The purchaser clicks on the thumbnail card image that they want to feature on the eGift card they are ordering.

   Note: *For instructions on how to upload card images for the purchaser to select, see Uploading a card image (page 13).*

   THUMBNAIL CARD IMAGES
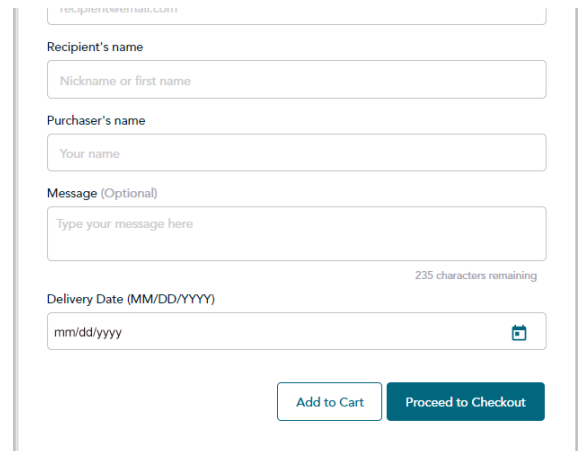
2. In the **Enter/Select a value** field, the purchaser enters the dollar amount to load on the eGift card, or they click on a pre-selected amount (e.g., **$10**, **$25**, or **$50**).

3. In the "Quantity" drop-down, the purchaser selects the number of eGift cards (**1**, **2**, **3**, **4**,...**15**) that they want to send to a recipient per the customizations that they selected in the previous steps.

Choosing a delivery (notification) method

1. In the "Choose your delivery method" panel (shown here), the purchaser does the following:

   a. To enable card delivery by email, the purchaser clicks on the **Email** button, or they click on the **Text Message** button for delivery by SMS text.

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[33] See Embedding the Moneris eGift iFrame code (page 21).

b. If the purchaser selects the "Email" option, they enter the recipient's email in the **Recipient's Email** field. If the purchaser selects the "Text Message" option, they enter the recipient's phone number in the **Recipient's Phone** field.

c. In the **Recipient's name** field, the purchaser enters the recipient's name (e.g., first name or nickname)

d. In the **Purchaser's name** field, the purchaser enters their own name (the recipient will receive a notification indicating the eGift card is from the name entered here).

e. In the **Message** field, the purchaser optionally enters a personal message to include in the delivery (notification).

f. In the purchaser wants the card to be delivered on a date other than today, they click on the calendar 📅 icon in the **Delivery Date (MM/DD/YYYY)** field, and select a desired date on the displayed calendar.

g. Continue at <u>Proceeding to checkout, or adding another item</u> (page 59).

Proceeding to checkout, or adding another item

Once the purchaser customizes their card (see Customizing the card on page 57) and selects their delivery method (see Choosing a delivery (notification) method on page 57), they choose whether to proceed to the checkout or add another item to their shopping cart as described below:

To proceed to the checkout:

1. The purchaser clicks on the **Proceed to Checkout** button.

2. Continue in Reviewing the shopping cart contents (page 60).

To add one or more new items to the cart:
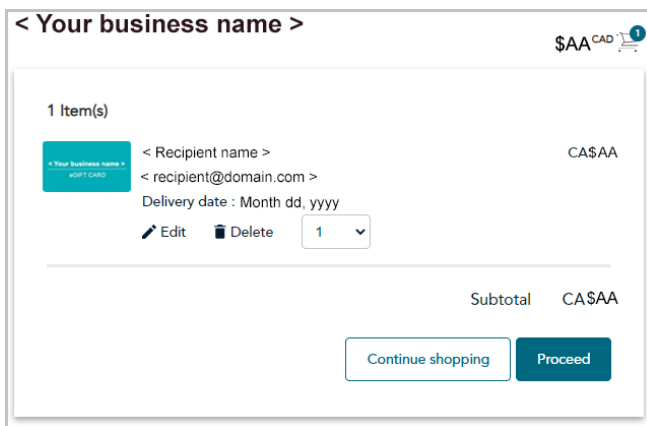
1. The purchaser clicks on the **Add to Cart** button.

2. When the customization and delivery page refreshes, continue in Customizing the card (page 57).

Reviewing the shopping cart contents
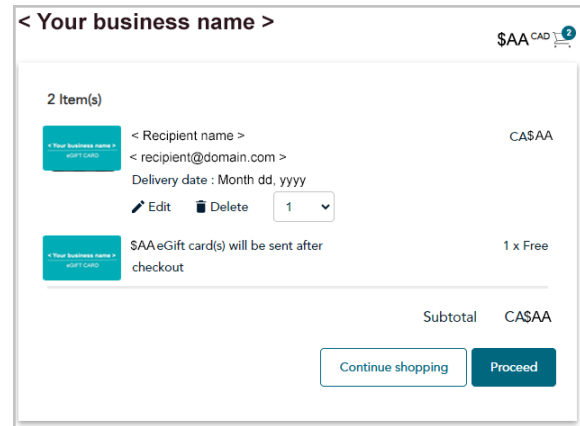
When the purchaser opts to proceed to the checkout (see <u>Proceeding to checkout, or adding another item</u> on page 59), the Moneris eGift iFrame displays the order summary, which lists the recipient name and email address, delivery date (mm-dd-yyyy), and quantity per shopping cart item.
The purchaser reviews their order and can edit their cart as described below.

Note: If your eGift card program is configured with a promotion and one or more items in the order qualifies (see <u>Promotional eGift card feature</u> on page 24), the shopping cart summary will also list one or more "Free" promotional cards for the purchaser.

SHOPPING CART: WITHOUT PROMOTIONAL CARD   SHOPPING CART: WITH PROMOTIONAL CARD

To proceed with the order as is:

1. The purchaser clicks on the **Proceed** button.

2. Continue in <u>Entering the billing details</u> (page 61).

To edit an item in the shopping cart:

1. The purchaser locates the item they want to edit and clicks on its ✏ **Edit** option.

2. Continue in <u>Editing an item in the shopping cart</u> (page 64).

To delete an item in the shopping cart:

1. The purchaser locates the item they want to delete and clicks on its 🗑 **Delete** option.

   *Note: If the "Your cart is empty Add a gift card to get started" response displays, the purchaser clicks on the **Continue shopping** button. The Moneris eGift iFrame refreshes back to the card customization and delivery page so that the purchaser can start their order again (continue in <u>Customizing the card</u> on page 57).*

To add one or more items to the shopping cart:

1. The purchaser clicks on the **Continue Shopping** button.

2. The Moneris eGift iFrame refreshes back to the card customization and delivery page so that the purchaser can add one or more items (continue in <u>Customizing the card</u> on page 57).

Moneris

Entering the billing details

Once the purchaser opts to proceed with their current shopping cart items (see <u>Reviewing the shopping cart contents</u> on page 60), the Moneris eGift iFrame displays the "Billing" fields (shown below). The purchaser enters their cardholder billing details as described below.

Note: The purchaser will be redirected back to this page if they receive a "Payment Declined" response upon submitting their order.
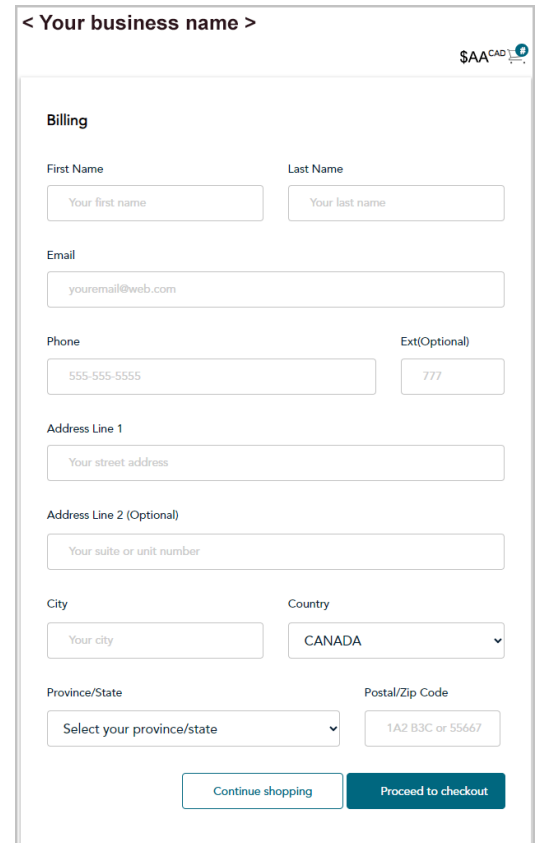
1. In the **First Name** field, the purchaser enters their first name.

2. In the **Last Name** field, the purchaser enters their surname.

3. In the **Email** field, the purchaser enters their email address.[34]

4. In the **Phone** field, the purchaser enters their phone number.

5. In the **Ext.** field, the purchaser optionally enters their phone extension.

6. In the **Address Line 1** field, the purchaser enters their street address.[35]

7. In the **Address Line 2** field, the purchaser enters their unit or apartment number if applicable.

8. In the "Country" drop-down, the purchaser selects their country (e.g., **CANADA**).

9. In the **City** field, the purchaser enters their city.

10. In the "Province/State" drop-down, the purchaser selects their province/state (e.g., **Ontario**).

11. In the **Postal Code/Zip Code**,[36] the purchaser enters their postal code/ZIP code.

12. The purchaser does one of the following:

    To proceed with the order as is:

    a. The purchaser clicks on the **Proceed to checkout** button.

    b. Continue in <u>Entering the payment details</u> (page 62).

    To add one or more items to the shopping cart:

    a. The purchaser clicks on the **Continue shopping** button.

    b. When the page refreshes, continue in <u>Customizing the card</u> (page 57).

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[34] If a promotion is configured for your eGift card program (see <u>Promotional eGift card feature</u> on page 24), we will send a promotional eGift card to this address once we successfully process this order to completion.

[35] If the address verification service (AVS) is enabled for your Moneris Gateway account, this data will be validated by the debit/credit card issuer.
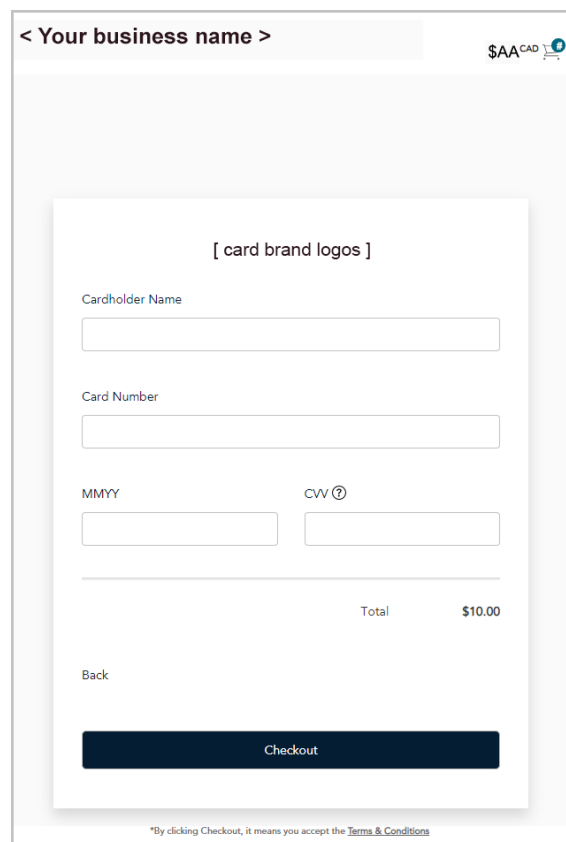
[36] See previous note.

Entering the payment details

Once the purchaser enters their billing details (see Entering the billing details on page 61), the Moneris eGift iFrame displays the payment fields (shown below).[37] The purchaser enters their payment details as described below.

Note: *If the purchaser wants to edit their billing details, they click on **Back** to return to the "Billing" fields (see Entering the billing details on page 61).*

1. In the **Cardholder Name** field, the purchaser enters their name as printed on their debit/credit card.

2. In the **Card Number** field, the purchaser enters their full debit/credit card number (PAN).

3. In the **MMYY** field, the purchaser enters their debit/credit card expiry date (mm/yy).

4. In the **CVV** field, the purchaser enters their debit/credit card's 3- or 4-digit card verification value.

5. The purchaser clicks on the **Checkout** button.

6. The purchaser waits for a confirmation response (continue in Waiting for the confirmation response on page 63).

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[37] Displayed card logos are standard in the checkout page but may be updated per your request if your merchant category supports it.

Once the purchaser enters their payment details and submits their order (see Entering the payment details on page 62), the Moneris eGift iFrame displays a confirmation response or a declined response:

"Order Placed!" confirmation response:

If the "Order Placed!" confirmation response displays (shown below), it means the we successfully processed a Preauthorization with the purchaser's debit/credit card information, and we will allow the order to proceed to the next phase in the order process (continue at step 4 in The order process described on page 56).
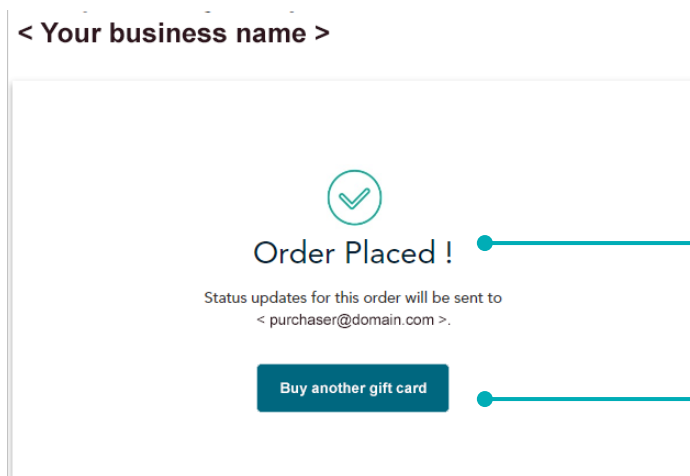
— Response text:
"Order Placed! Status updates for this order will be sent to < purchaser@domain.com >.

— Optional user action:
The purchaser can submit another order by clicking on the **Buy another gift card** button (continue in Placing an order on page 57).

"Payment Declined" dialog:

If the "Payment Declined" dialog displays (shown below), it means we could not process an approved Preauthorization with the purchaser's debit/credit card and/or billing details.

Dialog text:
"Payment Declined: We are unable to process your order. Please ensure your payment information, including your billing address, is correct and try again."
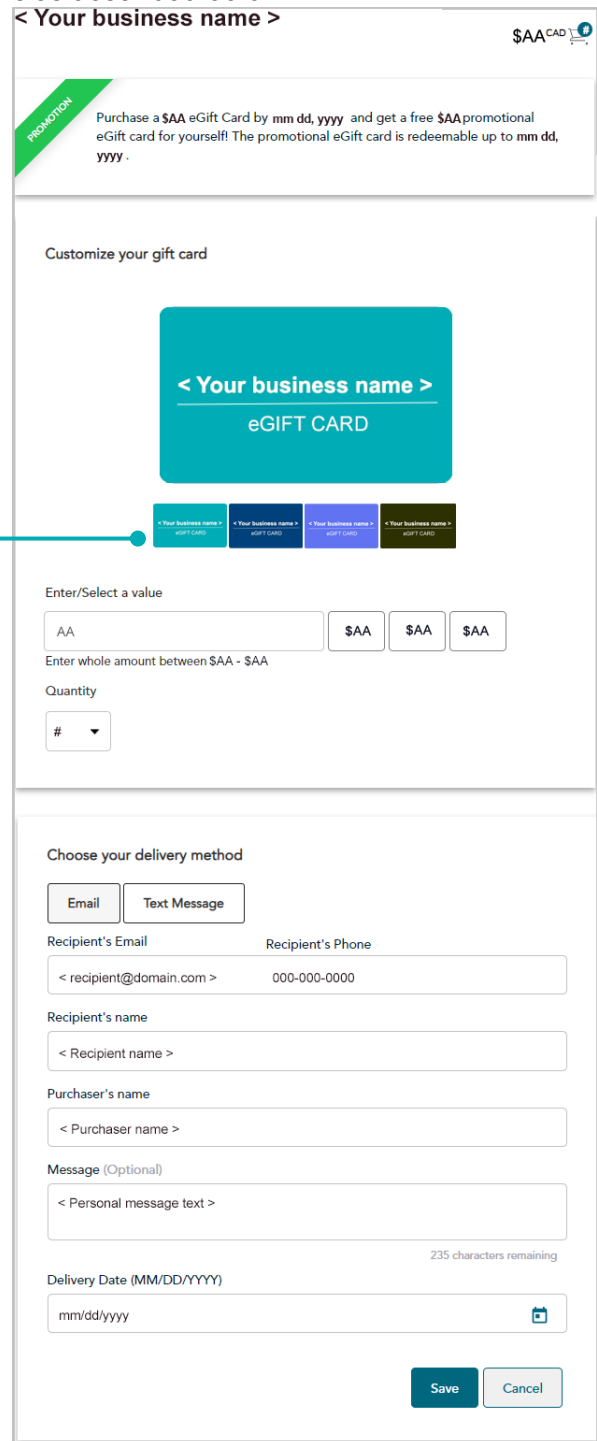
— Optional user action:
The purchaser can click on the dialog's "Close" **X** icon, whereupon the Moneris eGift iFrame returns to the "Billing" page so that the purchaser can re-enter their billing details and re-submit their order (see Entering the billing details on page 61).

Editing an item in the shopping cart

If the purchaser opts to edit an item in their shopping cart (see <u>Reviewing the shopping cart contents</u> on page 60), the Moneris eGift iFrame redirects the purchaser back to the customization and delivery page (shown below) so that they can edit one or more order details as described below

1. The purchaser can edit one or more "Customize your gift card" settings (shown here):

   a. To change the eGift card image, the purchaser clicks on the desired thumbnail card image.

   b. To change the dollar amount loaded on the card, purchaser can enter a new value in the **Enter/Select a value** field or they can click on a pre-selected amount (e.g., **$10**, **$25**, or **$50**).

   THUMBNAIL CARD IMAGES

   c. To change the quantity of cards, the purchaser clicks on "Quantity" drop-down and selects the number of eGift cards (**1**, **2**, **3**, **4**,...**15**) that they want to send to a recipient per the customizations selected in the previous steps.

2. The purchaser can edit one or more "Choose your delivery method" details (shown here):

   a. The purchaser clicks on the **Email** button to select delivery (notification) by email, or they click on the **Text Message** button for delivery by SMS text.

   b. If the purchaser selects the "Email" option, they enter the recipient's email in the **Recipient's Email** field. If the purchaser selects the "Text Message" option, they enter the recipient's phone number in the **Recipient's Phone** field.

   c. In the **Recipient's name** field, the purchaser enters the recipient's name (e.g., first name or nickname).

   d. In the **Purchaser's name** field, the purchaser enters their own name (the recipient will receive a notification indicating the eGift card is from the name entered here).

   e. In the **Message** field, the purchaser optionally enters a personal message to include in the delivery.

   f. In the purchaser wants the card to be delivered on a date other than today, they click on the calendar 📅 icon in the **Delivery Date (MM/DD/YYYY)** field, and select a desired date on the displayed calendar.

3. The purchaser clicks on the **Save** button.

4. Continue at <u>Reviewing the shopping cart contents</u> (page 60).

Client Portal: logging in / logging out.

In this section, we describe everything you need to know about starting a session/ending a session on the Client Portal.
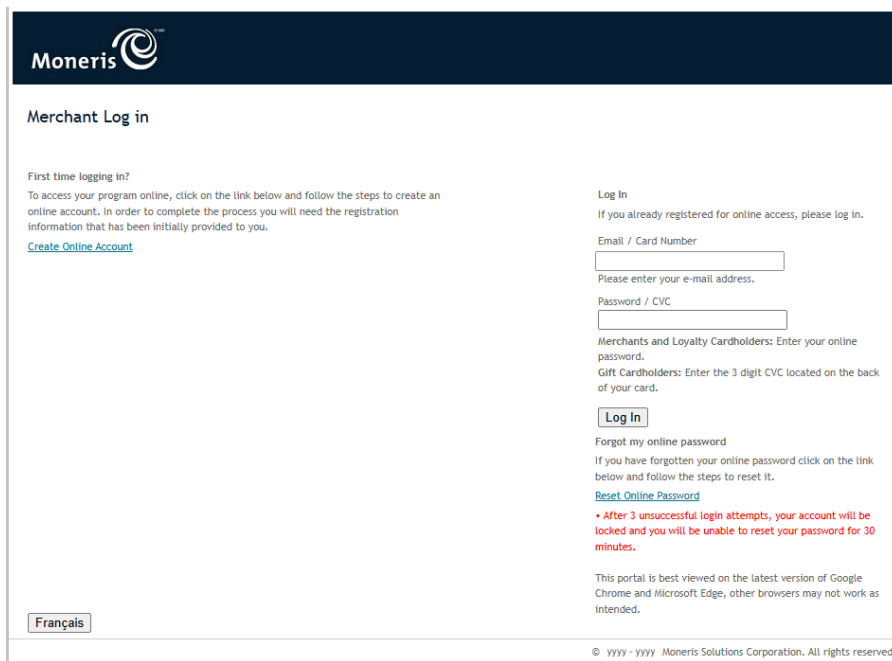
Logging into the Client Portal

The Moneris Client Portal supports an array of administrative features that you can use to access and manage your eGift card program. You can view queued orders and approve or reject them, cancel orders, update recipient contact information, resend notifications, etc.

The steps below describe how to log in and start a session on the Client Portal.

1. Visit moneris.com/giftloyaltycard/merchant to access the Client Portal "Merchant Log in" page (shown below).

    Note: If you want to go directly to your order queue, please access this "Merchant Log in" page by clicking on the button/link in your administrator user notification alert (see Notification alerts on page 82).

2. Enter your login credentials:

    a. In the **Email / Card Number** field, enter the email address that you registered with us when we set up your Client Portal account.

    b. In the **Password / CVC** field, enter your Client Portal login password.

    c. Click on the **Log In** button.

        Note: If you are logging in for the first time, you will be prompted to change your password and create answers to security questions.

3. When you are logged in, one of the following pages displays:

If the Client Portal homepage displays (shown below), it means you logged in via the Client Portal URL.

If the "Queued Orders" page displays (shown below), it means you logged in via an administrator user notification alert (see Notification alerts on page 82).

Forgot your Client Portal password?

If you forget your Client Portal password, you can reset it by following the steps below.

1. Visit moneris.com/giftloyaltycard/merchant to access the Client Portal "Merchant Log in" page (shown below).

   Note: *If you want to go directly to your order queue, please access this "Merchant Log in" page by clicking on the button/link in your administrator user notification alert (see Notification alerts on page 82).*

2. Click on **Reset Online Password**.

3. When the "Reset Online Password" page displays (shown below), do the following:

   a. In the **Enter your Login ID** field, enter your Client Portal login email address.

b. Checkmark the **I'm not a robot** box.

c. When the "reCAPTCHA" challenges display, respond to them and click on the **Verify** button.

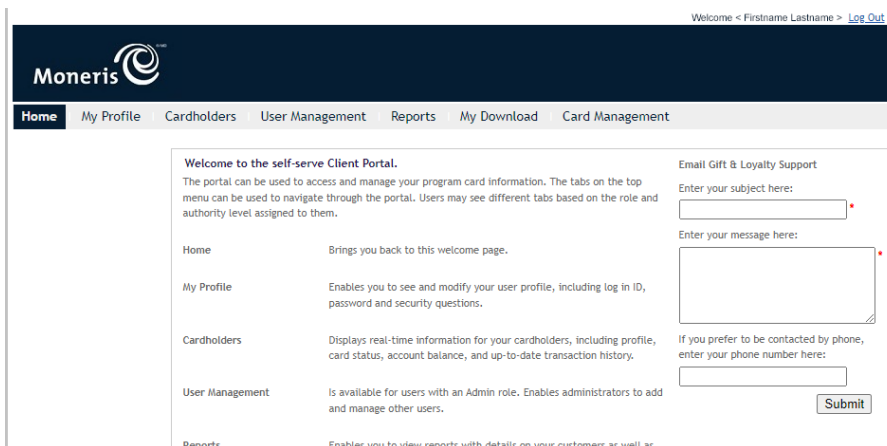d. When the green checkmark (approved) "reCAPTCHA" response displays (shown below), go to the next step.

e. Click on the **Send Code** button.

   Note: *We will send a reset code to your Client Portal login email address. When you receive the reset code in your inbox, proceed to the next step.*

4. When the "Reset Online Password" page refreshes to display the "Verification Code" field (shown below), do the following:
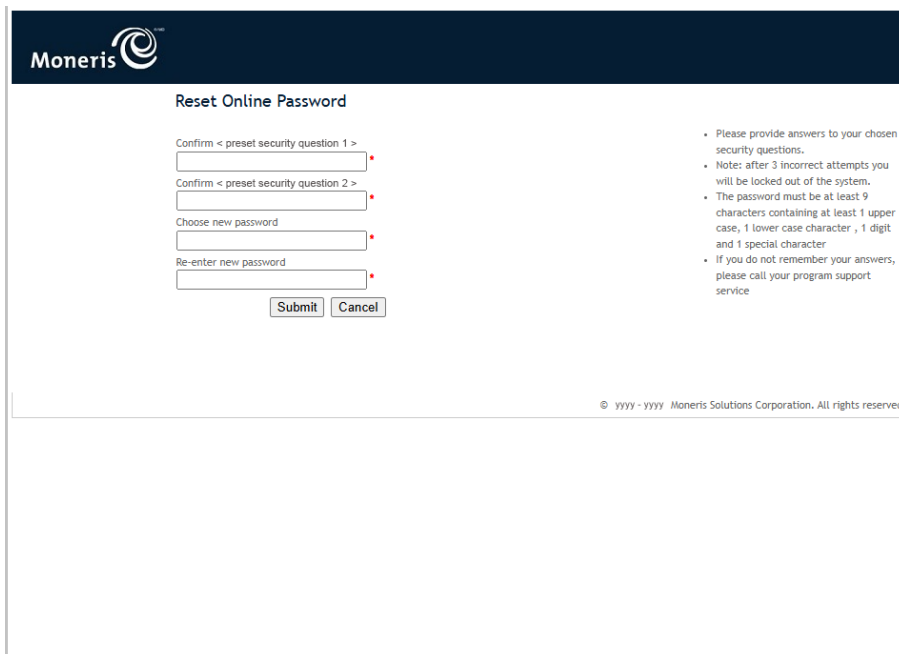
a. In the **Verification Code** field, enter your reset code.

b. Checkmark the **I'm not a robot** box.

c. When the "reCAPTCHA" challenges display, respond to them and click on the **Verify** button.

d. When the green checkmark (approved) "reCAPTCHA" response displays (shown below), go to the next step.
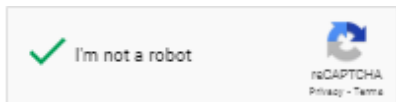
e. Click on the **Verify Code** button.

5. When the "Reset Online Password" page refreshes to display your security questions, (shown below), do the following:
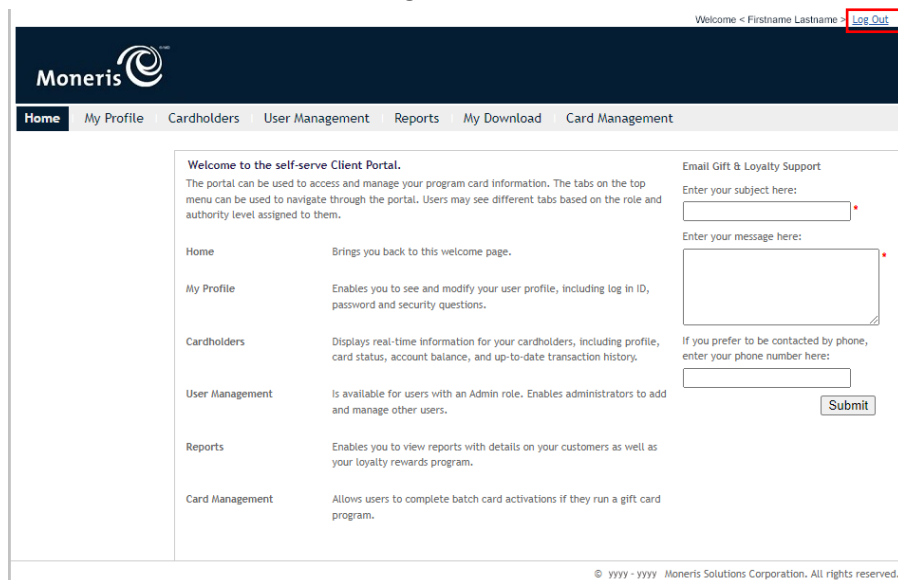
a. In each of the two **Confirm < preset security question >** fields, enter the correct answer.

b. In the **Choose new password** field, enter a new password.

Note: *The password must be at least 9 characters containing at least 1 upper case, 1 lower case character, 1 digit and 1 special character.*

c. In the **Re-enter new password** field, re-enter the new password.

d. Click on the **Submit** button.

e. When the Client Portal homepage displays (shown below), it means you have successfully reset your password and are now logged in.

Logging out of the Client Portal

The steps below describe how to end your session on the Client Portal.

1. While you are logged into the Client Portal, go to the top right corner on any Client Portal page (shown below), and click on **Log out**.

2. When the "You have logged out" response displays (shown below), it means you have successfully ended your session on the Client Portal.

"My Profile" settings.

In this section, we describe everything you need to know about configuring your user account preferences.

Accessing your "My Profile" settings

The steps below describe how to change your user account preferences including your default display language, login email, login password, and security questions.

1. Log into the Client Portal (see Logging into the Client Portal (page 67).

2. When you are logged in, click on **My Profile** in the menu bar (shown below).
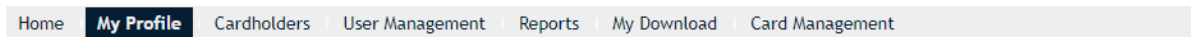
3. When the "My Profile" options display in the "Actions" navigation pane (shown below), do any of the following:
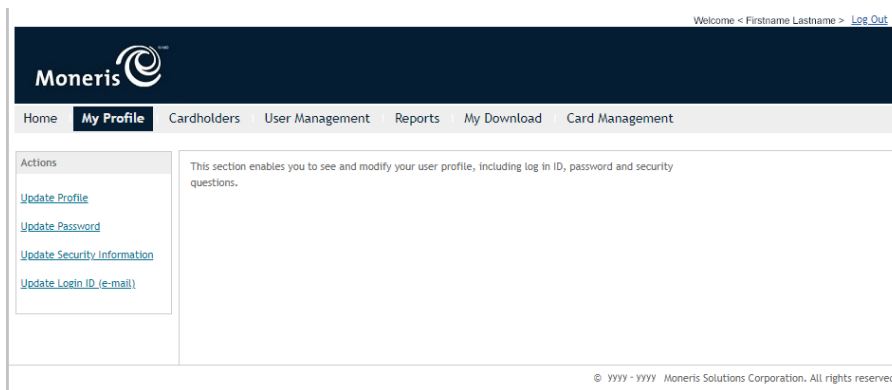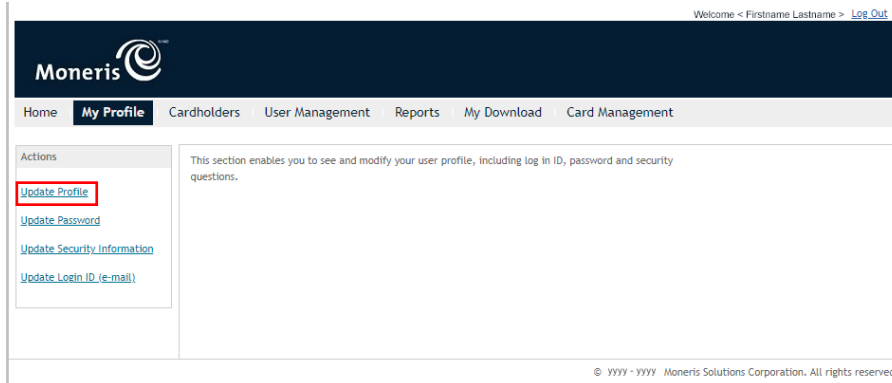

- To change your default display language, see Changing your Client Portal default display language (page 75).

- To change your login password, see Changing your Client Portal login password (page 76).

- To change your login email, see Changing your Client Portal login email (page 78).

- To change your security questions, see Changing your Client Portal security questions (page 80).
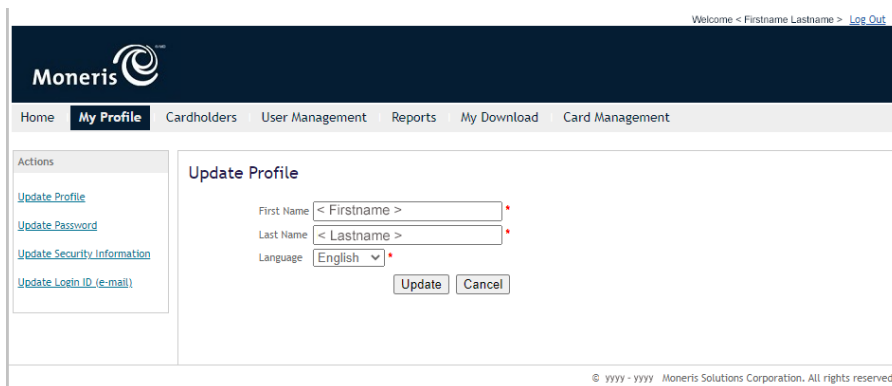   —

Changing your Client Portal default display language

The steps below describe how to change your user account's default display language while you are logged into the Client Portal.

1. Access your "My Profile" settings (see Accessing your "My Profile" settings on page 74).

2. On the "Actions" navigation pane (shown below), click on **Update Profile**.

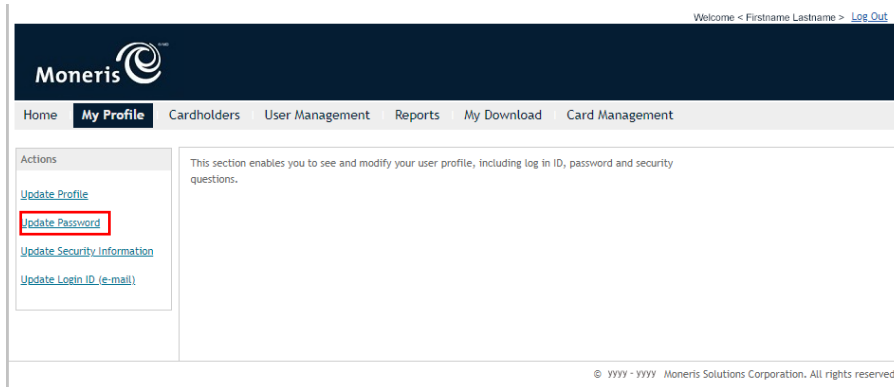3. When the "Update Profile" page displays (shown below), do the following:

    a. In the "Language" drop-down, select an option:
- To change the default display language to English, select **English**.
- To change the default display language to French, select **French**.

    b. Click on the **Update** button to save your changes.

   c. When the "Profile has been updated" response displays, the operation is complete.

Changing your Client Portal login password

The steps below describe how to change your Client Portal login password.

1. Access your "My Profile" settings (see Accessing your "My Profile" settings on page 74).

2. On the "Actions" navigation pane (shown below), click on **Update Password**.

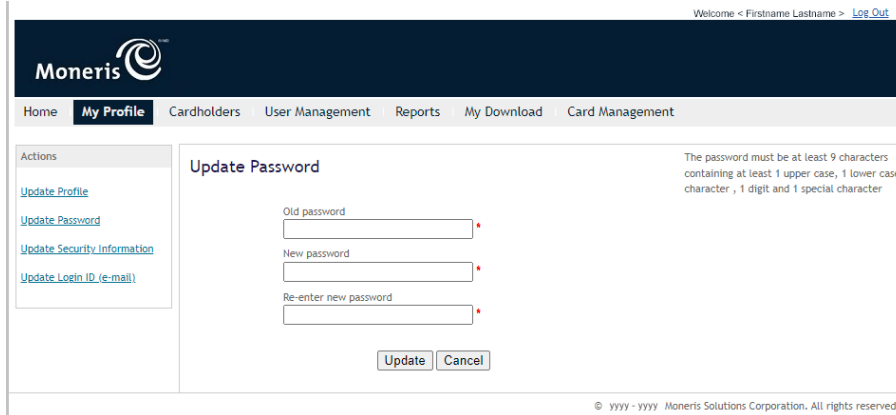3. When the "Update Password" page displays (shown below), do the following:
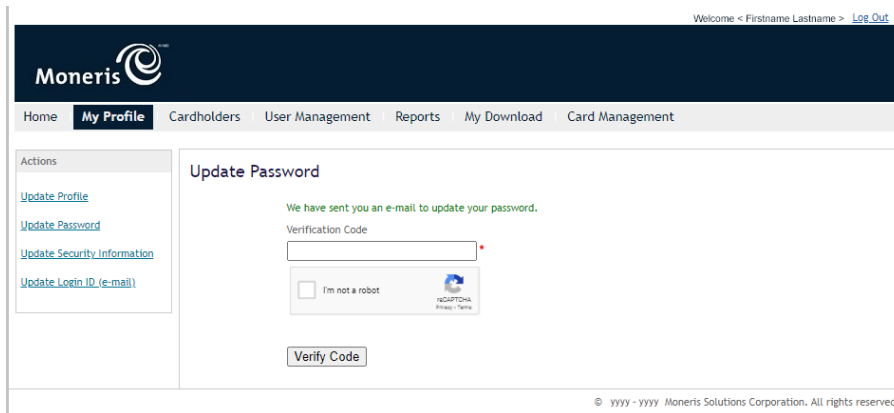
   a. Wait for a temporary verification code to arrive in your inbox.

   Note: We will send the temporary verification code to your Client Portal login email address.

   b. Checkmark the **I'm not a robot** box.

   c. When the "reCAPTCHA" challenges display, respond to them and click on the **Verify** button.

   d. When the green checkmark (approved) "reCAPTCHA" response displays (shown below), go to the next step.
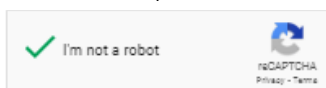
   e. In the **Verification Code** field, enter your temporary verification code, and click on the **Verify Code** button.

4. When the password fields display (shown below), do the following:

a. In the **Old password** field, enter your current password.

b. In the **New password** field, enter your new password.

    Note: The password must be at least 9 characters containing at least 1 upper case, 1 lower case character, 1 number and 1 special character.

c. In the **Re-enter new password** field, re-enter your new password.

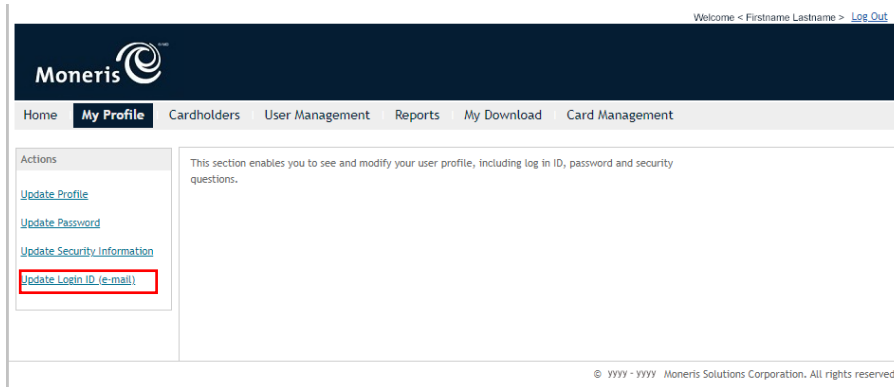d. Click on the **Update Password** button to save your changes.

e. When the "Profile has been updated" response displays, the operation is complete.

    Note: The next time you attempt to log into the Client Portal, you must enter your new password.

Changing your Client Portal login email

The steps below describe how to change your Client Portal login email.

1. Access the "My Profile" settings (see Accessing your "My Profile" settings on page 74).

2. On the "Actions" navigation pane (shown below), click on **Update Login ID (e-mail)**.

3. When the "Update Login ID (email)" page displays (shown below), do the following:

   a. Wait for a temporary verification code to arrive in your inbox.

   Note: *We will send the temporary verification code to your Client Portal login email address.*

   b. In the **Verification Code** field, enter your temporary verification code, and click on the **Verify Code** button.

4. When the "Update Login ID (e-mail)" page displays the password and login ID fields (shown below), do the following:

a. In the **Password / CVC** field, enter your Client Portal login password.

b. In the **New Login ID**, enter your new email address.

   Important! Please ensure this is a valid address. If you ever forget your password and need to reset it, we will send a temporary code to the address. You will be prompted to enter this temporary code to log in.

c. In the **Re-enter New Login ID**, re-enter your new email address.

d. Checkmark the **I am not a robot** box.

e. When the "reCAPTCHA" challenges display, respond to them and click on the **Verify** button.

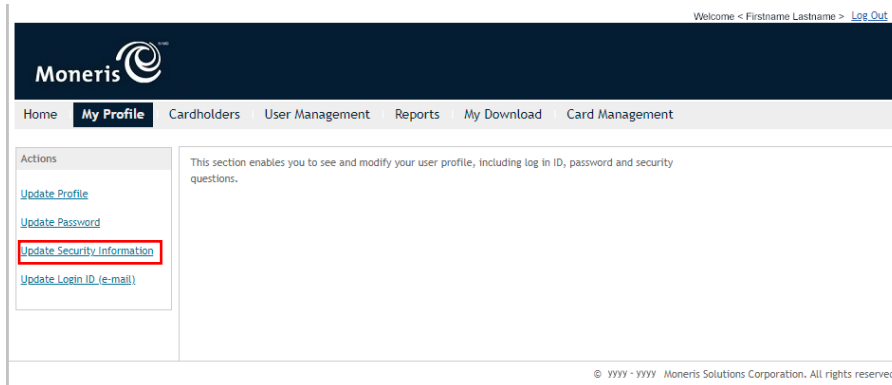f. When the approved (green checkmark) response displays (shown below), go to the next step.
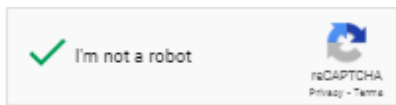
g. Click on the **Update** button to save your changes.

h. When the "Profile has been updated" response displays, the operation is complete.

   Note: *The next time you attempt to log into the Client Portal, you must enter the new email address that you have just registered.*
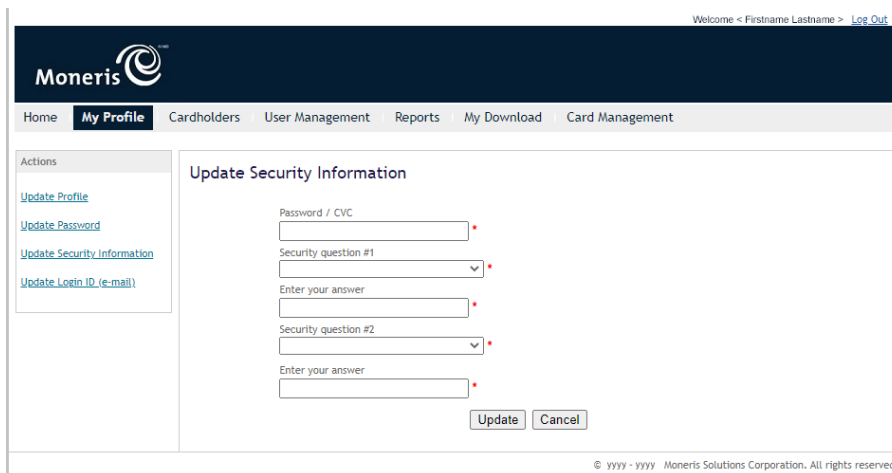
Changing your Client Portal security questions

The steps below describe how to change one or more of your security questions. Periodically, the Client Portal will prompt you to answer a security question when you attempt to log in.

1. Access your "My Profile" settings (see Accessing your "My Profile" settings on page 74).

2. In the "Actions" navigation pane (shown below), click on **Update Security Information**.

3. When the "Update Security Information" page displays (shown below), do the following:

   a. In the **Password / CVC** field, enter your Client Portal login password.

   b. Click on any "Security question #" drop-down, and select a question.

   c. In the corresponding **Enter your answer** field, enter a custom answer to the question.

   d. Click on the **Update** button to save your changes.

   e. When the "Profile has been updated" response displays, the operation is complete.

Notification alerts.

In this section, we describe everything you need to know about the notification alerts that we send to inform you, your customers, and the eGift card recipients about the status of their eGift card orders.

Notification alerts

A notification alert contains status information about an eGift card order that has been submitted through your Moneris eGift iFrame. Whenever a customer (purchaser) submits an eGift card order (see The order process described on page 55), it triggers our server to send one or more notification alerts to one or more of the following persons:

- eGift card program administrator user(s)

- eGift card purchaser

- eGift card recipient

The type and timing of the notification depends on the several factors, including the purchase amount threshold for which your eGift card program is configured, your actions, and the period of time during which one or more pending orders sit in the queue as described in the table below:

Notification recipient	Notification type	Description
Administrator user	Pending Order	New order awaiting approval/rejection (see "Pending Order" notification on page 83).
	Pending Orders Reminder	Order(s) queued for specific time period[38] and still awaiting approval/rejection (see "Pending Orders Reminder" notification on page 84).
eGift card purchaser	Thank you for shopping with us!	Order pending approval: see "Thank you for shopping with us!": order pending review notification (page 87). Order processed and completed (manually approved): see "Thank you for shopping with us!": order approved notification (page 88). Order processed and completed (auto-approved): see "Thank you for shopping with us!": order summary notification (page 89).
	Thank you for your purchase!	A promotional eGift card is available to be accessed by the purchaser (see "Thank you for your purchase" notification on page 90).
	Reminder	The recipient has not accessed their eGift card within a specific time period[39] (see "Reminder" notification on page 85).
	Order Cannot Be Completed	Order cannot be completed because the order was reviewed and rejected or because of system issue (see "Order Cannot Be Completed" notification on page 86).
eGift card recipient	You've received a $AA eGift Card	A non-promotional eGift card is available to be accessed by the recipient (see "Recipient, you've received a $AA eGift Card!" notification on page 91).

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[38] The time period is determined by your eGift card program configuration.
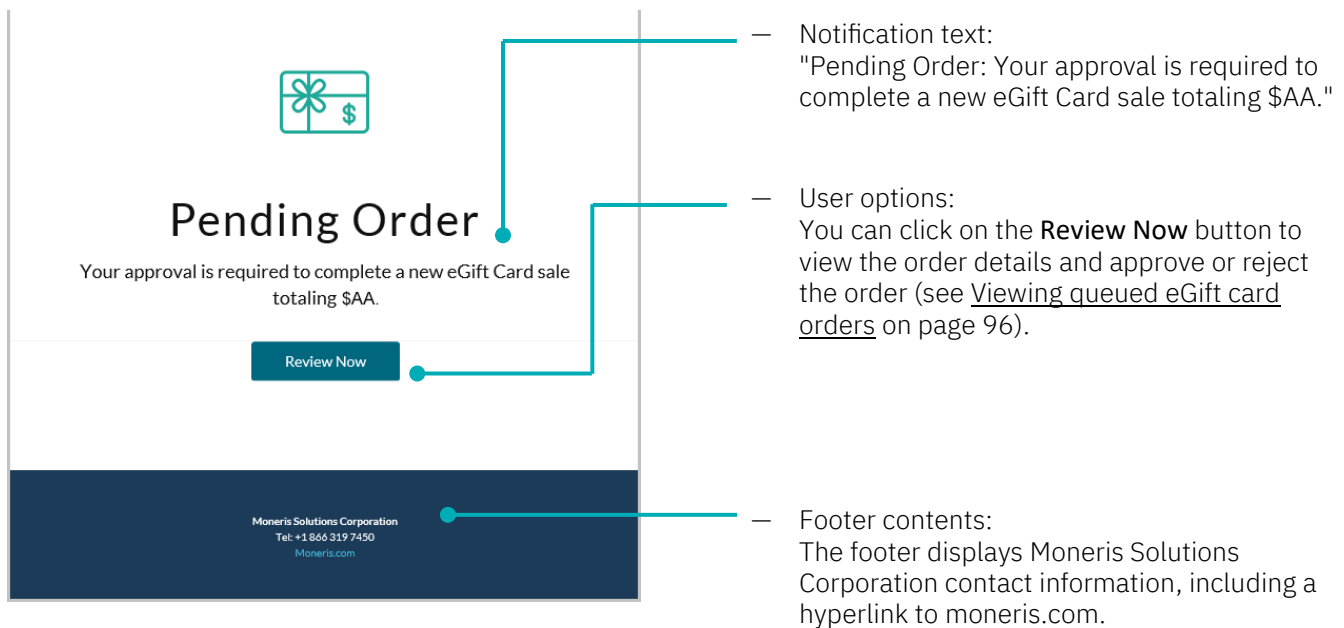[39] See footnote above.

"Pending Order" notification

We send this notification alert email (shown below) to you/your administrator user(s).

Why we send this notification:

When a purchaser submits an eGift card order that equals or exceeds the purchase amount threshold configured for your program (see Placing an order on page 57), it triggers our server to send this notification alert to inform you that there is a newly queued order awaiting approval/rejection. The notification contents are described below.

Note: If the order is not approved or rejected within a specific period of time (as determined by your eGift card program configuration), it triggers our server to send a reminder notification alert to you (see "Pending Orders Reminder" notification on page 84).

— Notification text:
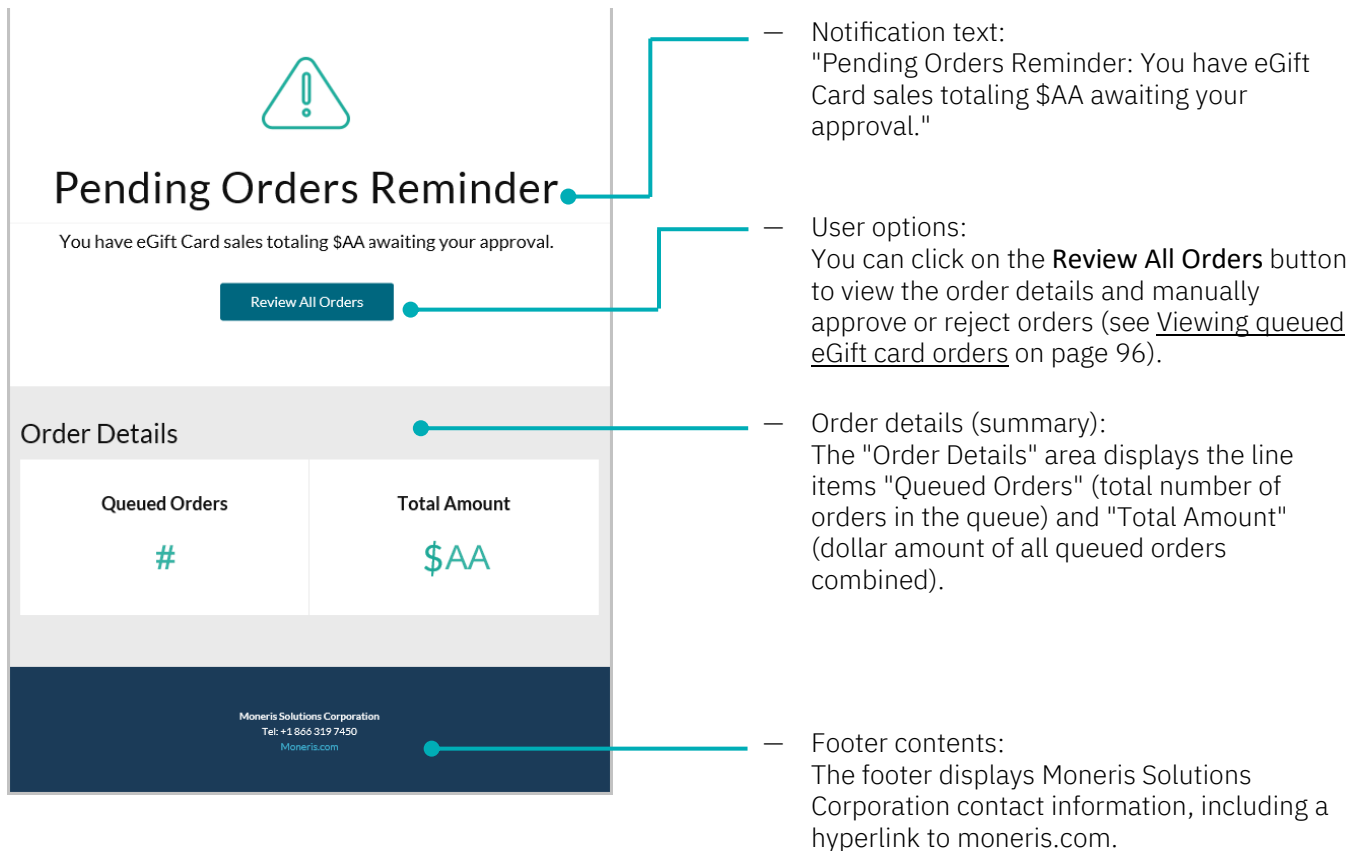"Pending Order: Your approval is required to complete a new eGift Card sale totaling $AA."

— User options:
You can click on the **Review Now** button to view the order details and approve or reject the order (see Viewing queued eGift card orders on page 96).

— Footer contents:
The footer displays Moneris Solutions Corporation contact information, including a hyperlink to moneris.com.

![Moneris logo]

"Pending Orders Reminder" notification

We send this notification alert email (shown below) to you/your administrator user(s).

Why we send this notification:

If your order queue contains one or more pending eGift card orders[40] for an extended period of time (as determined by your eGift card program configuration), it triggers our server to send this notification to inform you that there are queued order(s) still awaiting manual approval/rejection. The notification contents are described below.

— Notification text:
"Pending Orders Reminder: You have eGift Card sales totaling $AA awaiting your approval."

— User options:
You can click on the **Review All Orders** button to view the order details and manually approve or reject orders (see Viewing queued eGift card orders on page 96).

— Order details (summary):
The "Order Details" area displays the line items "Queued Orders" (total number of orders in the queue) and "Total Amount" (dollar amount of all queued orders combined).

— Footer contents:
The footer displays Moneris Solutions Corporation contact information, including a hyperlink to moneris.com.
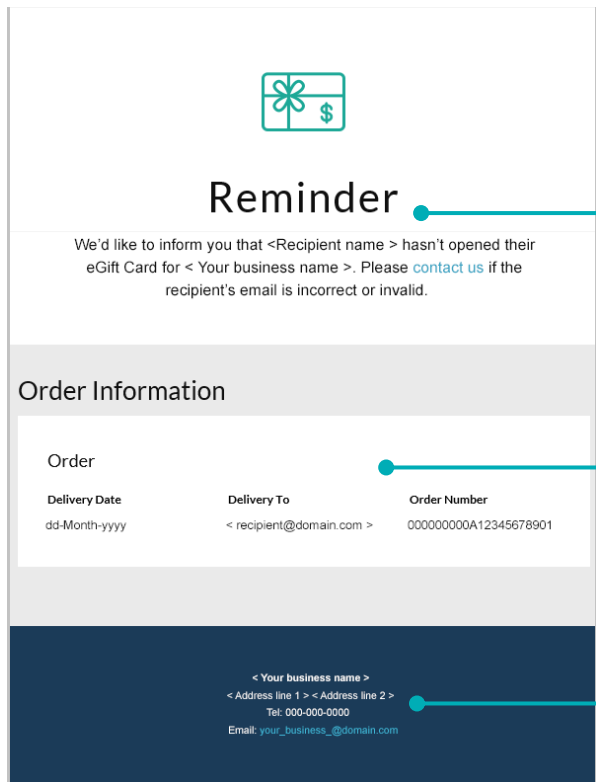
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[40] An order is routed to the queue if the order purchase amount equals or exceeds the purchase amount threshold configured for your eGift card program. The order remains in the queue indefinitely until you approve or reject it.

"Reminder" notification

We send this notification alert email (shown below) to the purchaser who submitted the eGift card order through your Moneris eGift iFrame (see Placing an order on page 57).

Why we send this notification:

If the eGift recipient has not accessed their (non-promotional) eGift card within a specific period of time following the creation of the eGift card (the time period is determined by your eGift card program configuration), it triggers our server to send this notification to the purchaser to inform them that the eGift card has not been accessed. The notification contents are described below.

— Notification text:
"Reminder: We'd like to inform you that < Recipient name > hasn't opened their eGift Card for <Your business name >. Please **contact us** if the recipient's email is incorrect or invalid."

— User options:
By clicking on the "contact us" mail-to hyperlink, the purchaser can send an email message to you. Upon the purchaser's request, you can update the delivery method and resend the eGift card to the recipient (see Resending a "Recipient, you've received a $AA eGift Card!" notification on page 111).

— Order details:
The "Order Information" area displays the line items "Delivery Date" (dd-Month-yyyy), "Delivery To" (recipient email address), and "Order Number" (a unique identifier).

— Footer contents:
The footer displays your business contact information, including a mail-to hyperlink to your customer inbox.

"Order Cannot Be Completed" notification

We send this notification alert email (shown below) to the purchaser who originally submitted the eGift card order through your Moneris eGift iFrame (see Placing an order on page 57).

Why we send this notification:

If a purchaser submits an order that we cannot process (e.g., because the order was queued and rejected by an you/an administrator user[41]), it triggers our server to send this notification to inform the purchaser their order cannot be completed. The notification contents are described below.

— Notification text:
"Order Cannot Be Completed: We appreciate your business and interest in our eGift Cards. Unfortunately, your order cannot be completed."

— User options:
The purchaser can click on the **Visit Our Website** button, which redirects them back to your ecommerce site so they can re-submit their order.

— Order details:
The "Order Information" area displays the "Order Number" (a 12-digit unique identifier), the "Order Date" (dd-Month-yyyy), and "Amount" (total dollar value of the order).

— Footer contents:
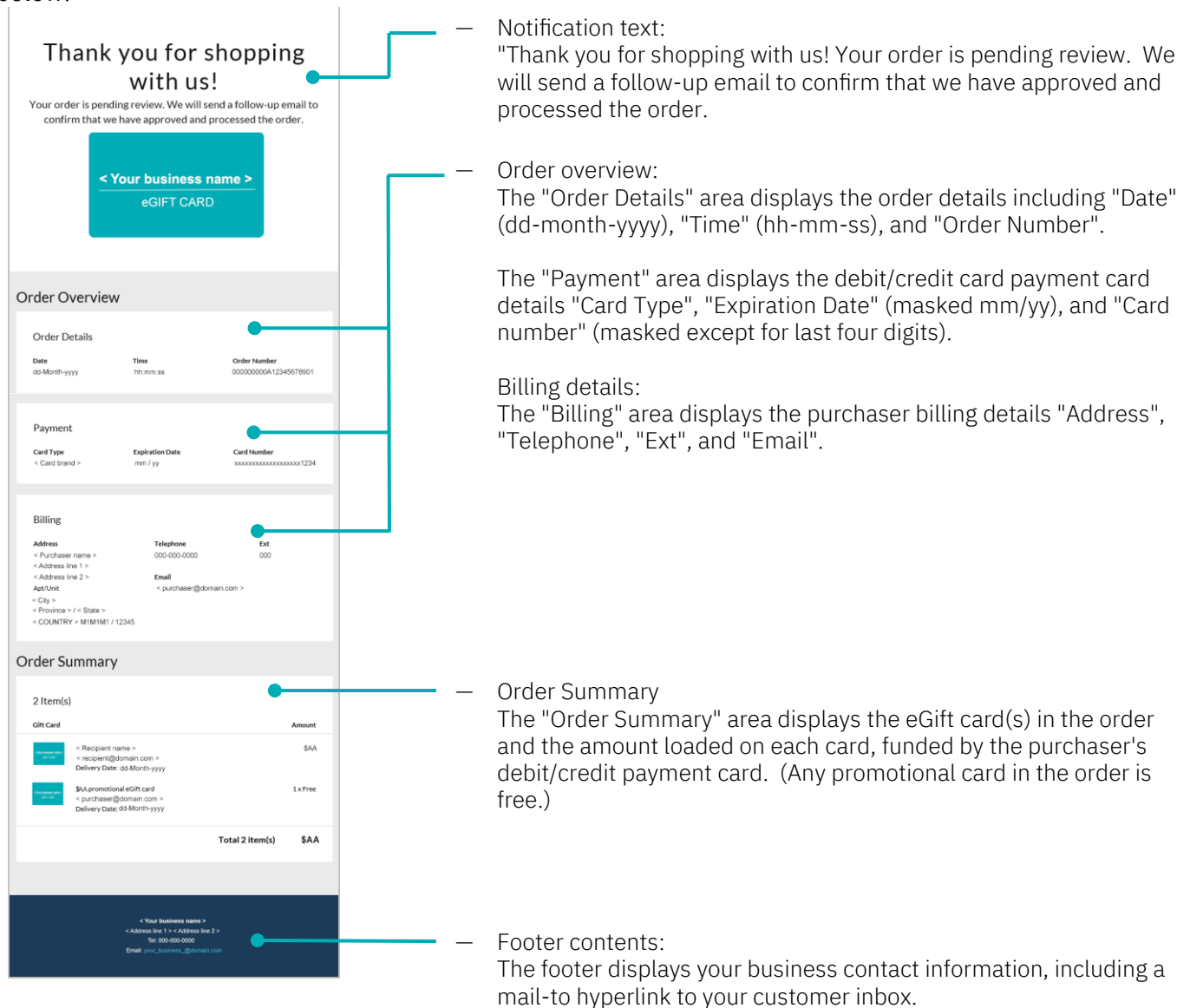Your business contact information, including a clickable mail-to hyperlink to your customer inbox.

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[41] See Rejecting a queued eGift card order (page 99).

"Thank you for shopping with us!": order pending review notification

We send this pending review notification alert email (shown below) to the purchaser who submitted the eGift card order through your Moneris eGift iFrame (see Placing an order on page 57).

Why we send this notification:

When the purchaser submits an eGift card order that is routed to the queue for review, it triggers our server to send this notification to the purchaser to inform them that their order has been received and to expect a follow-up notification pending a review of the order. The notification contents are described below.

— Notification text:
"Thank you for shopping with us! Your order is pending review. We will send a follow-up email to confirm that we have approved and processed the order.

— Order overview:
The "Order Details" area displays the order details including "Date" (dd-month-yyyy), "Time" (hh-mm-ss), and "Order Number".

The "Payment" area displays the debit/credit card payment card details "Card Type", "Expiration Date" (masked mm/yy), and "Card number" (masked except for last four digits).

Billing details:
The "Billing" area displays the purchaser billing details "Address", "Telephone", "Ext", and "Email".

— Order Summary
The "Order Summary" area displays the eGift card(s) in the order and the amount loaded on each card, funded by the purchaser's debit/credit payment card. (Any promotional card in the order is free.)

— Footer contents:
The footer displays your business contact information, including a mail-to hyperlink to your customer inbox.
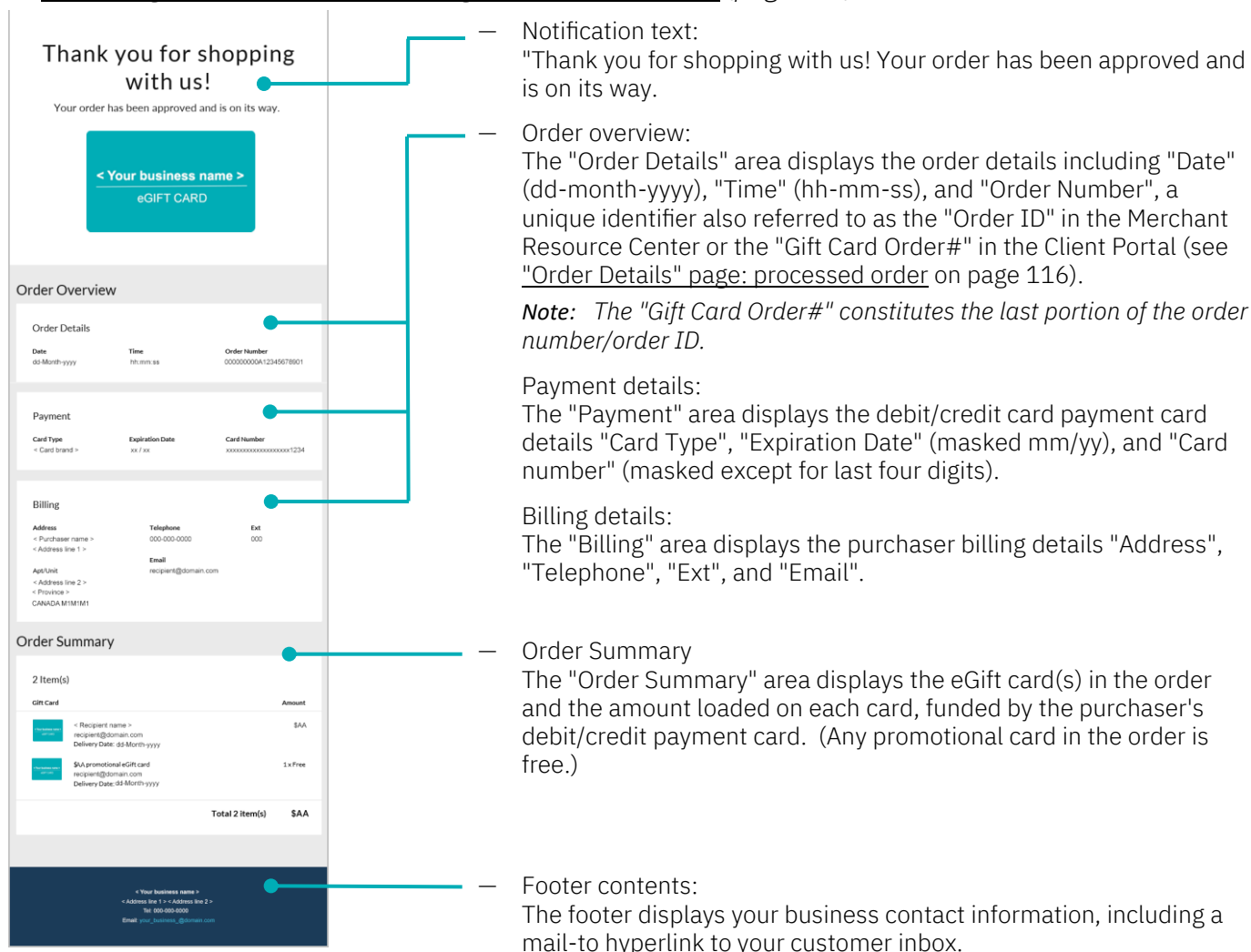
"Thank you for shopping with us!": order approved notification

We send this notification alert email (shown below) to the purchaser who submitted the eGift card order through your Moneris eGift iFrame (see Placing an order on page 57).

Why we send this notification:

When the purchaser submits an eGift card order that is routed to the queue and manually approved, it triggers our server to send this notification to the purchaser to inform them that we have successfully processed and completed their order.[42] This notification serves as both the order receipt and the order summary. The notification contents are described below.

Note: If you need to change the notification language (English or French) and/or the delivery address, see Resending a "Thank you for shopping with us!" notification (page 110).

— Notification text:
"Thank you for shopping with us! Your order has been approved and is on its way.

— Order overview:
The "Order Details" area displays the order details including "Date" (dd-month-yyyy), "Time" (hh-mm-ss), and "Order Number", a unique identifier also referred to as the "Order ID" in the Merchant Resource Center or the "Gift Card Order#" in the Client Portal (see "Order Details" page: processed order on page 116).

Note: The "Gift Card Order#" constitutes the last portion of the order number/order ID.

Payment details:
The "Payment" area displays the debit/credit card payment card details "Card Type", "Expiration Date" (masked mm/yy), and "Card number" (masked except for last four digits).

Billing details:
The "Billing" area displays the purchaser billing details "Address", "Telephone", "Ext", and "Email".

— Order Summary
The "Order Summary" area displays the eGift card(s) in the order and the amount loaded on each card, funded by the purchaser's debit/credit payment card. (Any promotional card in the order is free.)

— Footer contents:
The footer displays your business contact information, including a mail-to hyperlink to your customer inbox.

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[42] Our server sends a notification alert to the eGift card recipient(s) (see "Recipient, you've received a $AA eGift Card!" notification on page 91).
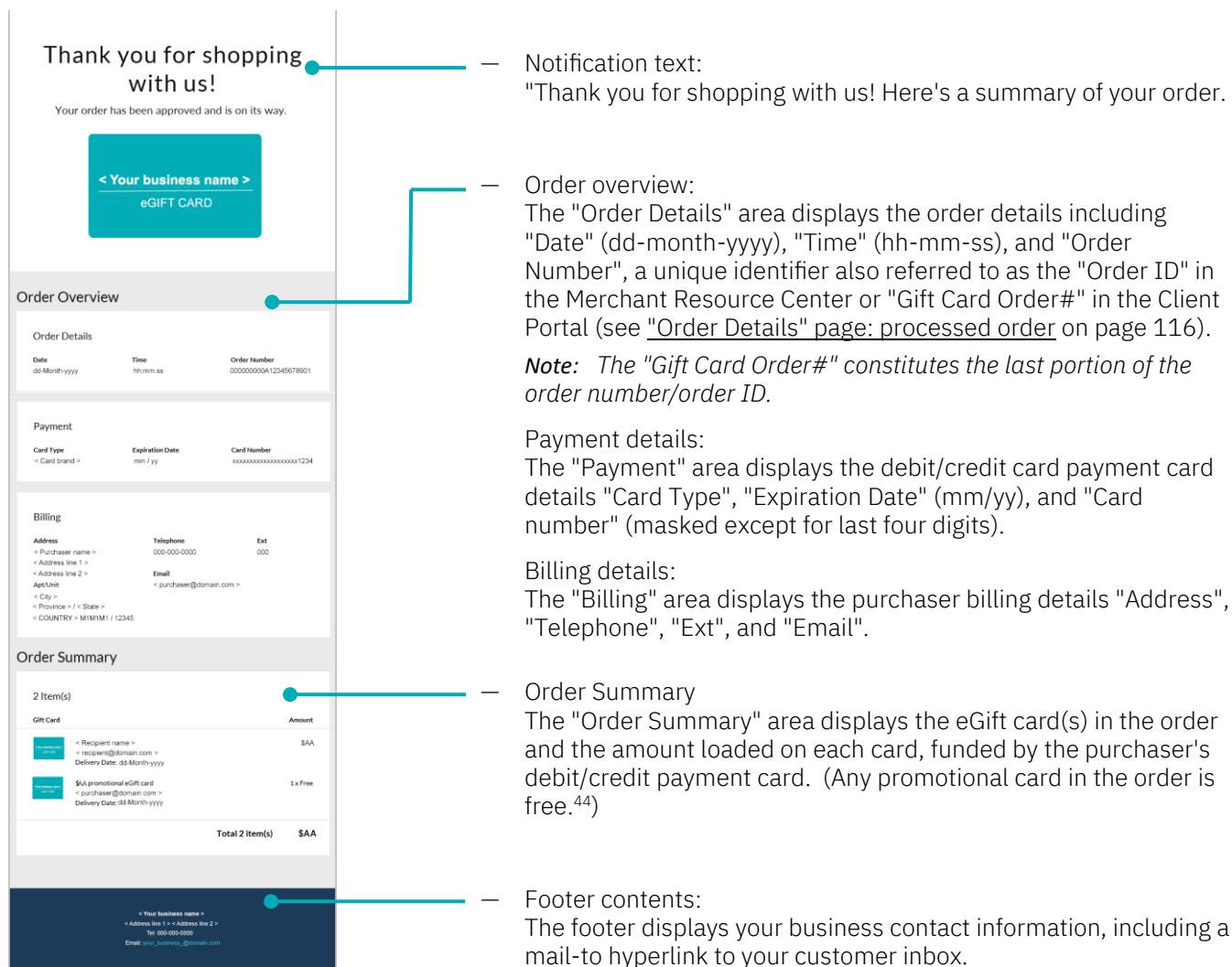
"Thank you for shopping with us!": order summary notification

We send this notification alert email (shown below) to the purchaser who submitted the eGift card order through your Moneris eGift iFrame (see Placing an order on page 57).

Why we send this notification:

When the purchaser submits an eGift card order that is auto-approved (i.e., not routed to the queue), processed, and completed, it triggers our server to send this notification to the purchaser.[43] This notification serves as both the order receipt and the order summary. The notification contents are described below.

Note: If you need to change the notification language (English or French) and/or the delivery address, see Resending a "Thank you for shopping with us!" notification (page 110).

— Notification text:
"Thank you for shopping with us! Here's a summary of your order.

— Order overview:
The "Order Details" area displays the order details including "Date" (dd-month-yyyy), "Time" (hh-mm-ss), and "Order Number", a unique identifier also referred to as the "Order ID" in the Merchant Resource Center or "Gift Card Order#" in the Client Portal (see "Order Details" page: processed order on page 116).

Note: The "Gift Card Order#" constitutes the last portion of the order number/order ID.

Payment details:
The "Payment" area displays the debit/credit card payment card details "Card Type", "Expiration Date" (mm/yy), and "Card number" (masked except for last four digits).

Billing details:
The "Billing" area displays the purchaser billing details "Address", "Telephone", "Ext", and "Email".

— Order Summary
The "Order Summary" area displays the eGift card(s) in the order and the amount loaded on each card, funded by the purchaser's debit/credit payment card. (Any promotional card in the order is free.[44])

— Footer contents:
The footer displays your business contact information, including a mail-to hyperlink to your customer inbox.

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[43] Our server sends a notification alert to the eGift card recipient(s) (see "Recipient, you've received a $AA eGift Card!" notification on page 91).
[44] If the purchase qualifies the purchaser to receive a promotional card, our server sends them a "Thank you for your purchase" notification (see page 90).
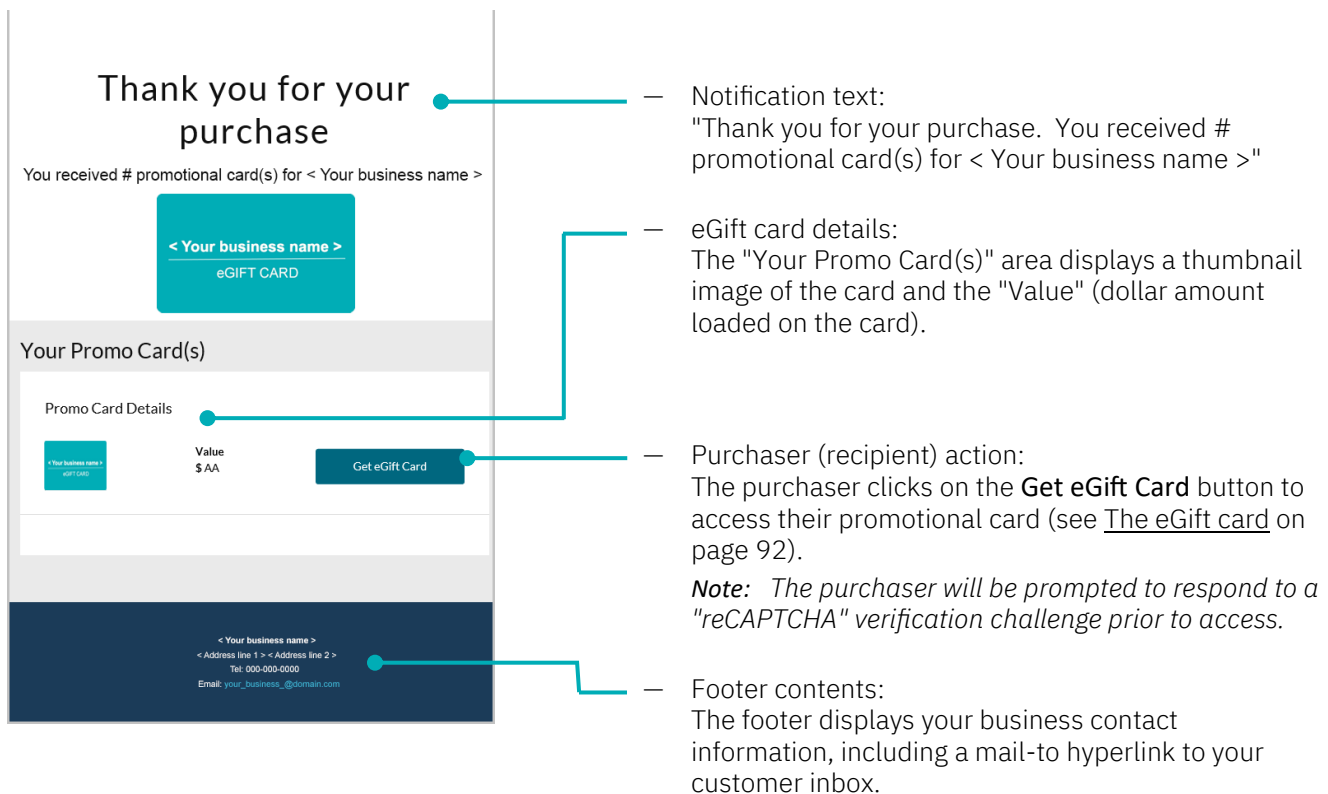
"Thank you for your purchase" notification

We send this notification alert email (shown below) to the purchaser who submitted the eGift card order through your Moneris eGift iFrame (see Placing an order on page 57).

Why we send this notification:

When we successfully process an eGift card order to completion and the order incudes at least one item that qualifies the purchaser to receive a free promotional card, it triggers our server to generate the promotional eGift card(s) and send this notification email to the purchaser.

The notification contains a link to the promotional eGift card(s) and indicates dollar value for each card as described below. (For information about the promotion feature, see Promotional eGift card feature on page 24.)

Note: If you need to resend this notification or update delivery details, including email address, delivery date, and language (English/French), see Resending a "Thank you for your purchase" notification (page 113).

— Notification text:
"Thank you for your purchase. You received # promotional card(s) for < Your business name >"

— eGift card details:
The "Your Promo Card(s)" area displays a thumbnail image of the card and the "Value" (dollar amount loaded on the card).

— Purchaser (recipient) action:
The purchaser clicks on the **Get eGift Card** button to access their promotional card (see The eGift card on page 92).

Note: The purchaser will be prompted to respond to a "reCAPTCHA" verification challenge prior to access.

— Footer contents:
The footer displays your business contact information, including a mail-to hyperlink to your customer inbox.
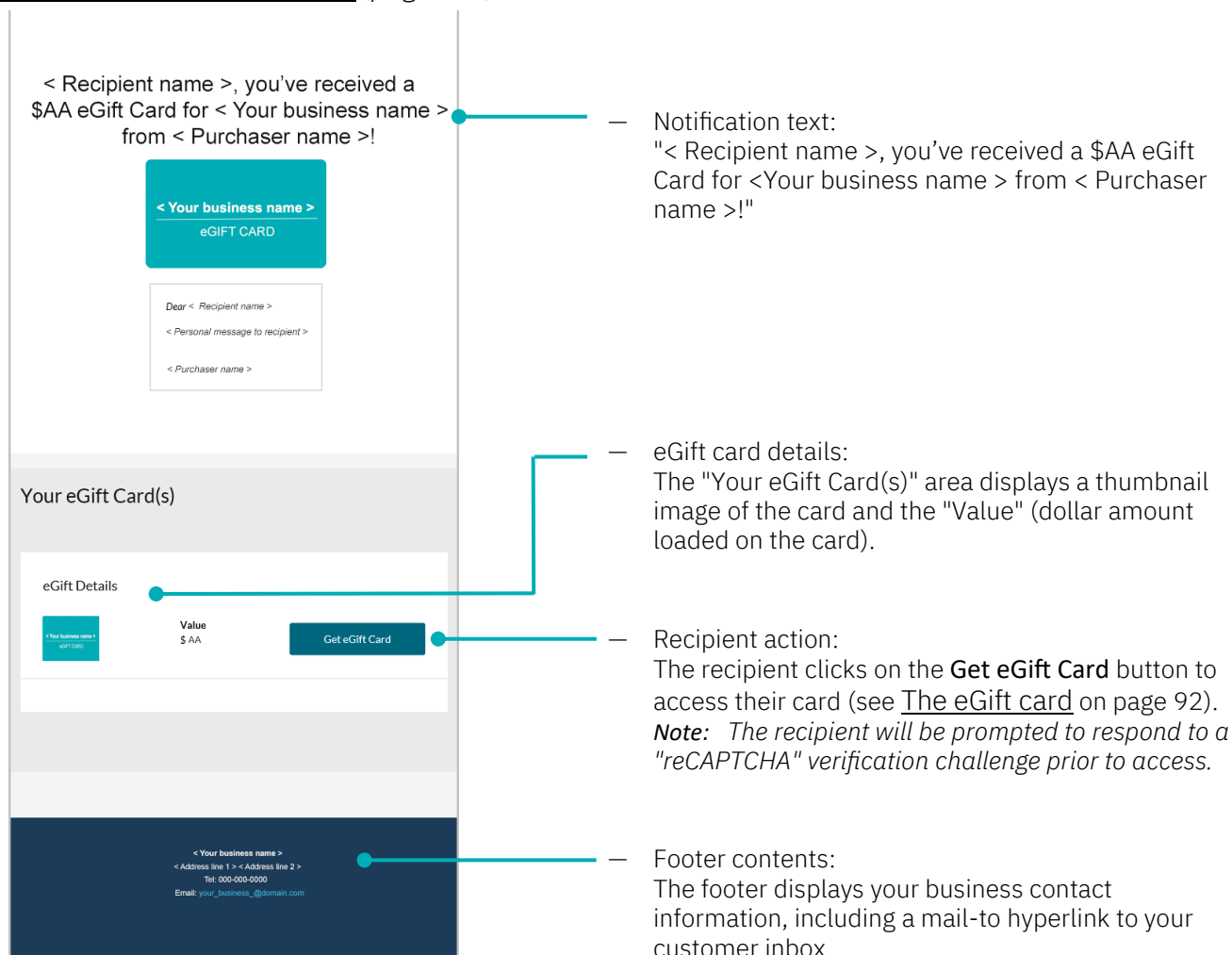
![Moneris logo]

"Recipient, you've received a $AA eGift Card!" notification

We send this notification alert email or SMS text message to the recipient of a non-promotional eGift card.

Why we send this notification:

When we successfully process an eGift card order to completion (see <u>The order process described</u> on page 55), it triggers our server to generate the eGift card(s) and send this notification to the recipient(s) per the specifications in the order. The notification contains a link to the eGift card(s) and indicates dollar value for each as described below.[45]

Note: If you need to resend this notification or update delivery details, including email address/mobile phone number, delivery date, and language (English/French), see <u>Resending a "Recipient, you've received a $AA eGift Card!" notification</u> (page 111).
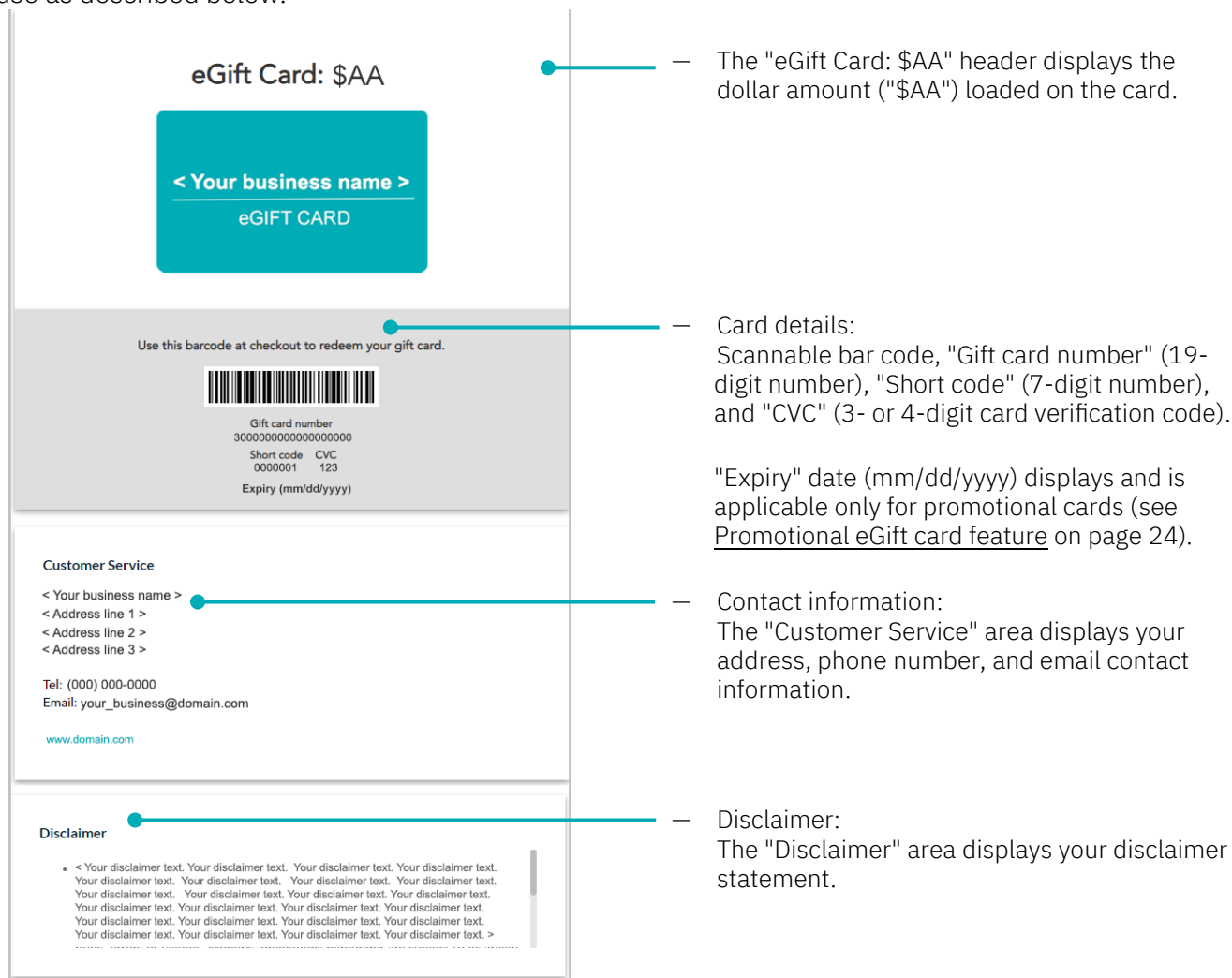
<table>
<tr>
<td>

< Recipient name >, you've received a
$AA eGift Card for < Your business name >
from < Purchaser name >!

< Your business name >
eGIFT CARD

Dear < Recipient name >

< Personal message to recipient >

< Purchaser name >

Your eGift Card(s)

eGift Details

< Your business name >
eGIFT CARD

Value
$ AA

Get eGift Card

< Your business name >
< Address line 1 > < Address line 2 >
Tel: 000-000-0000
Email: your_business_@domain.com

</td>
<td>

— Notification text:
"< Recipient name >, you've received a $AA eGift Card for <Your business name > from < Purchaser name >!"

— eGift card details:
The "Your eGift Card(s)" area displays a thumbnail image of the card and the "Value" (dollar amount loaded on the card).

— Recipient action:
The recipient clicks on the **Get eGift Card** button to access their card (see <u>The eGift card</u> on page 92).
Note: The recipient will be prompted to respond to a "reCAPTCHA" verification challenge prior to access.

— Footer contents:
The footer displays your business contact information, including a mail-to hyperlink to your customer inbox.

</td>
</tr>
</table>

---

[45] If an eGift card is not accessed within a specific time period (as determined by your eGift card program configuration), it triggers our server to send a reminder notification to the purchaser (see <u>"Reminder" notification</u> on page 85).

The eGift card

Once generated, an eGift card is rendered on a Moneris-hosted page, which the recipient can access via their notification alert (see Notification alerts on page 82). The eGift card is fully activated and ready to use as described below.

eGift Card: $AA

< Your business name >
eGIFT CARD

— The "eGift Card: $AA" header displays the dollar amount ("$AA") loaded on the card.

Use this barcode at checkout to redeem your gift card.

Gift card number
3000000000000000000
Short code   CVC
0000001   123
Expiry (mm/dd/yyyy)

— Card details:
Scannable bar code, "Gift card number" (19-digit number), "Short code" (7-digit number), and "CVC" (3- or 4-digit card verification code).

"Expiry" date (mm/dd/yyyy) displays and is applicable only for promotional cards (see Promotional eGift card feature on page 24).

Customer Service

< Your business name >
< Address line 1 >
< Address line 2 >
< Address line 3 >

Tel: (000) 000-0000
Email: your_business@domain.com

www.domain.com

— Contact information:
The "Customer Service" area displays your address, phone number, and email contact information.

Disclaimer

• < Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text.   Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. Your disclaimer text. >

— Disclaimer:
The "Disclaimer" area displays your disclaimer statement.

Using the eGift card in-store at a point-of-sale

The recipient can present their eGift card bar code (shown above) for you to scan with your Moneris terminal[46], or you can perform a manual entry transaction on the terminal by keying in the gift card number (or the short code[47]) and the CVC.

Using the eGift card online

The recipient can enter the full gift card number (or short code[48]) and the CVC in your ecommerce checkout's gift card payment fields.

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[46] The scan function may or may not be supported on your terminal.
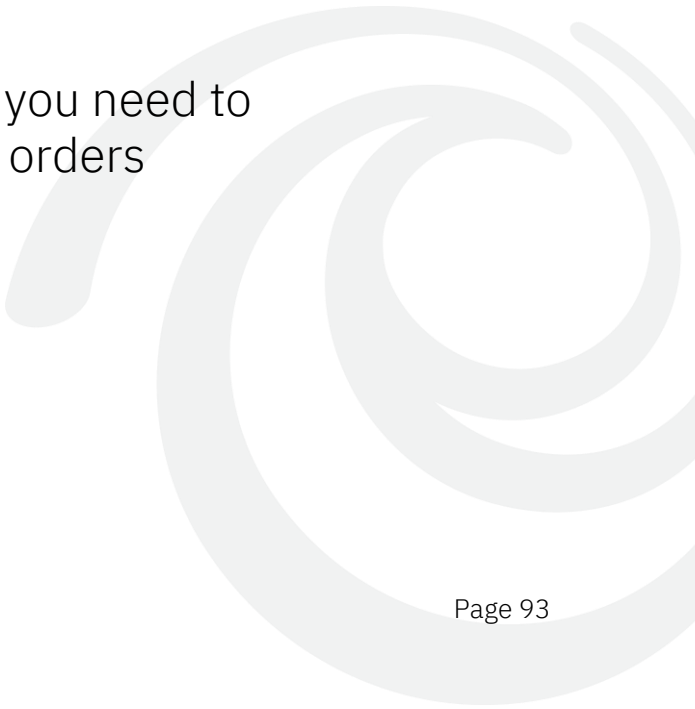[47] Your Moneris gift card program must be configured to support short code entry.
[48] Your Moneris gift card program must be configured to support short code entry.

Adinistering your orders.

In this section, we go over everything you need to know about managing your eGift card orders through the Client Portal.

Administrator users

A Client Portal user with administrator access, you are responsible for the performing administrative duties to support your eGift card program. Administrative duties are described below.

Note: *If you are designating additional administrator user(s), please consider what will happen if one or more users is unavailable to action queued orders. If too many queued orders are idle for too long, it may negatively impact your sales. (For a full description of the order process from start to finish, see* <u>*The order process described*</u> *on page 55.)*

Administrative duties

Administrator duties include responding to notification alerts; daily monitoring of queued orders; approving, rejecting, and cancelling orders; resending notifications; and managing/updating artwork files as required:

Responding to notification alerts:

- See <u>"Pending Order" notification</u> (page 83).
- See <u>"Pending Orders Reminder" notification</u> (page 84).

Daily monitoring and reviewing of queued eGift card orders:

- See <u>Viewing queued eGift card orders</u> (page 96).
- See <u>Retrieving/viewing non-queued eGift card</u> orders (page 108).

Approving and rejecting queued eGift card orders:

- See <u>Approving a queued eGift card order</u> (page 97).
- See <u>Rejecting a queued eGift card order</u> (page 99).

Resending a notification:

- See <u>Resending a "Thank you for shopping with us!" notification</u> (page 110).
- See <u>Resending a "Recipient, you've received a $AA eGift Card!" notification</u> (page 111).
- [Promotional card] See <u>Resending a "Thank you for your purchase" notification</u> (page 113).

Cancelling orders and deactivating cards:

- See <u>Cancelling an entire eGift card order</u> (page 101) or <u>Partially cancelling an eGift card order</u> (page 103).

Managing/updating artwork files

- See <u>eGift card image management settings</u> (page 10).

Reviewing and exporting reports

- See <u>Enterprise and exception eGift card reports</u> (see page 128).

Purchase amount threshold
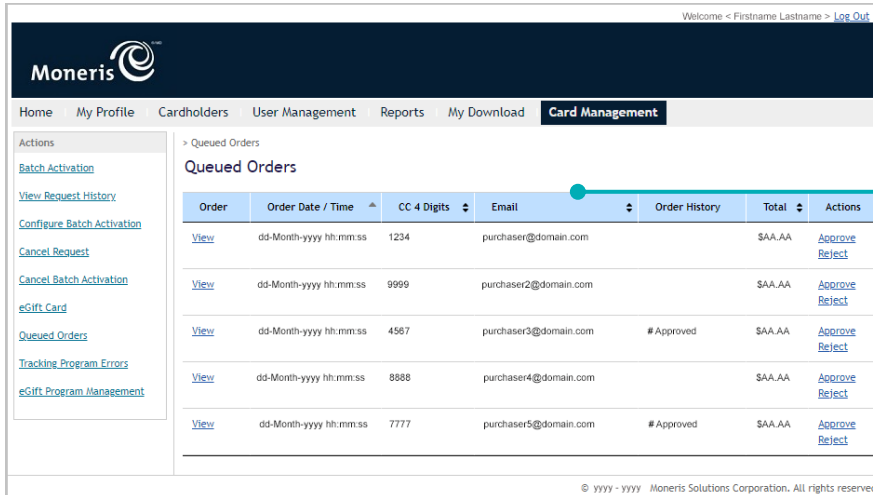
When an eGift card order is submitted for an amount that equals or exceeds the purchase threshold configured for your eGift card program, we automatically route the order to the order queue as a "pending" order. The pending order is held in the queue until an administrator can review and then approve or decline the order (see Administrator users on page 94).

Note: *If you configured a promotion for your eGift card program, we send one or more promotional eGift cards to the purchaser who submitted the order provided the order content meets the conditions of your promotion (see Promotional eGift card feature on page 24).*

Viewing queued eGift card orders

The order queue contains all the eGift card orders waiting to be approved or rejected. We automatically route an eGift card order to the queue if the order equals or exceeds the purchase amount threshold configured for your program (for details about the order process, see The order process described on page 55).

Your queued orders are listed on the "Queued Orders" page (shown below), which you can access by using one of the methods described below:

Orders are listed according to the following headers:

— "Order Date / Time": Date (dd-Month-yyyy) and time hh:mm:ss) on which the buyer submitted the order.
— "CC 4 Digits:" Last four digits of the buyer's debit/credit card.
— "Email": The purchaser's email address.
— "Order History": Number of previously approved orders submitted by a purchaser using a recurring email address (orders are linked by the recurring address).
— "Total": Total dollar amount of the order.

Note: You can click on the up/down ⬍ icon beside a header to re-sort the list in ascending/descending order.
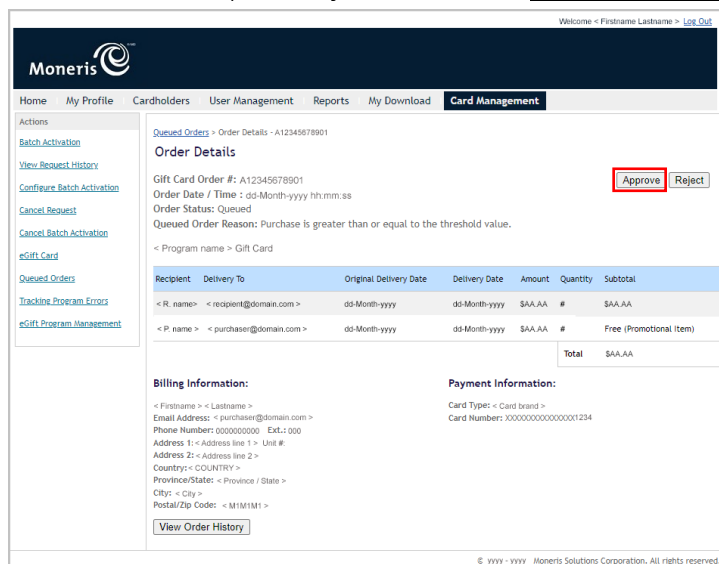
Use the Client Portal URL and navigate menus:	Click on your administrator notification alert:
1. Log into the Client Portal (see Logging into the Client Portal on page 67).	1. Click on the link/button contained in your notification alert: ▪ See "Pending Order" notification (page 83). ▪ See "Pending Orders Reminder" notification (page 84).
2. When you are logged in, click on **Card Management** in the menu bar (shown above).	
3. Go to the "Actions" navigation pane, and click on **Queued Orders**.	2. When the Client Portal homepage displays, log in (see Logging into the Client Portal on page 67).
4. When the "Queued Orders" page displays, you may take further action (see Optional actions for queued orders below).	3. When the "Queued Orders" page displays, you may take further action (see Optional actions for queued orders below).
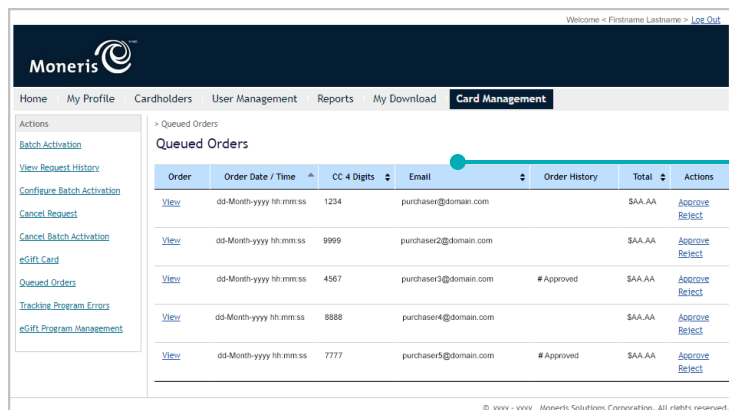
Optional actions for queued orders

▪ To approve an order and/or view the order details, see Approving a queued eGift card order (page 97).

▪ To reject an order and/or view the order details, see Rejecting a queued eGift card order (page 99).

Moneris

Approving a queued eGift card order

The steps below describe how to manually approve a queued eGift order so that we can process it to completion.

1. Log into the Client Portal, and access your order queue (see Viewing queued eGift card orders on page 96).

2. On the "Queued Orders" page (shown below), do the following:

Orders are listed according to the following headers:

— "Order Date / Time": Date (dd-Month-yyyy) and time hh:mm:ss) on which the buyer submitted the order.
— "CC 4 Digits:" Last four digits of the buyer's debit/credit card.
— "Email": The purchaser's email address.
— "Order History": Number of previously approved orders submitted by a purchaser using a recurring email address (orders are linked by the recurring address).
— "Total": Total dollar amount of the order.

Note: You can click on the up/down ⬍ icon beside a header to re-sort the list in ascending/descending order.

To approve without viewing the order details:

a. Locate the desired order, and click on its **Approve** link in the "Actions" column.

b. Continue at step 3 (page 98).

To view the order details prior to approving:

a. Locate the desired order, and click on its **View** link in the "Order" column.

b. When the "Order Details" page displays (shown below), click on the **Approve** button.

 Note: For descriptions of line items, see "Order Details" page: queued order (page 114).

c. Continue at step 3 (page 98).

![Moneris logo]

3. When the "Queued Orders" dialog displays (shown below), click on its **Confirm** button.
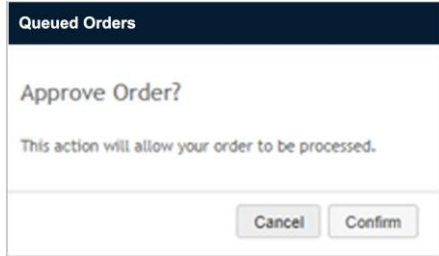
4. Wait while we process the request (this may take several seconds). When the dialog closes, the operation is complete:

   ▪ If you initiated the approval from the "Order Details" page, it refreshes and displays the response
   "The order has been approved successfully. The order number was A00000000000".

   ▪ If you initiated the approval from the "Queued Orders" page, it refreshes and displays the response "The order has been approved successfully and processed. The order number was A00000000000".
   (The newly approved order is de-listed.)

   ▪ The order is logged as "Approved" in the Client Portal (see Retrieving/viewing non-queued eGift card orders on page 108).

What happens after you approve the order
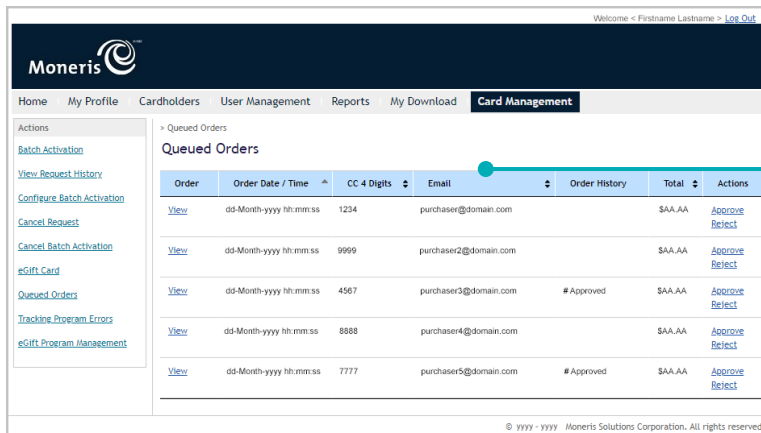
We close the Preauthorization by processing a Completion (Capture) transaction so that the Preauthorized funds are captured for settlement. We generate the eGift card and send a notification alert to the eGift card recipient (see "Recipient, you've received a $AA eGift Card!" notification on page 91).

Note: *If the order qualifies the purchaser to receive a promotional eGift card, we send a notification alert to the purchaser (see "Thank you for your purchase" notification on page 90).*

Rejecting a queued eGift card order

The steps below describe how to reject a queued eGift order so that we discontinue it.

1. Log into the Client Portal, and access your order queue (see <u>Viewing queued eGift card orders</u> on page 96).

2. On the "Queued Orders" page (shown below), do the following:

Orders are listed according to the following headers:
- "Order Date / Time": Date (dd-Month-yyyy) and time hh:mm:ss) on which the buyer submitted the order.
- "CC 4 Digits:" Last four digits of the buyer's debit/credit card.
- "Email": The purchaser's email address.
- "Order History": Number of previously approved orders submitted by a purchaser using a recurring email address (orders are linked by the recurring address).
- "Total": Total dollar amount of the order.

Note: You can click on the up/down ⬍ icon beside a header to re-sort the list in ascending/descending order.

To reject without viewing the order details:

a. Go to the "Actions" column, and click on the order's **Reject** link.

b. Continue at step 3 (page 100).

To view the order details prior to rejecting:

a. Go to the "Order" column, and click on the order's **View** link.

b. When the "Order Details" page displays (shown below), click on the **Reject** button.

Note: For descriptions of line items, see <u>"Order Details" page: queued order</u> (page 114).

c. Continue at step 3 (page 100).
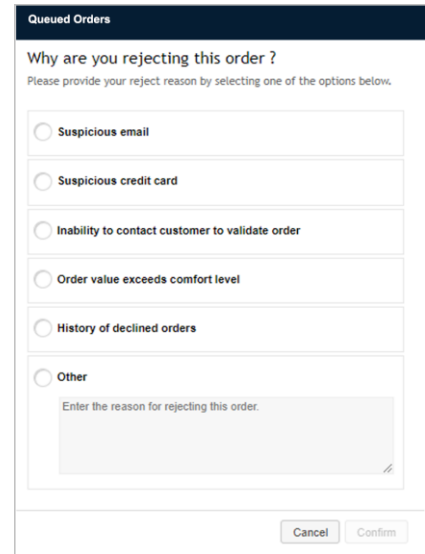
3. When the "Queued Orders" dialog displays (shown below), do the following:

   a. Select the radio button corresponding to the reason describing why you are rejecting the order. Reasons include **Suspicious credit card**, **Suspicious email**, **Inability to contact customer to validate order**, **Order value exceeds comfort level**, **History of declined orders**, or **Other**.

      Note: *If you select "Other", enter a description in the field.*

   c. Click on the **Confirm** button.

   d. Wait while we process the request (this may take several seconds).

4. When the "Order Queue" page refreshes, the newly rejected order is de-listed and the operation is complete.

What happens after you reject the order

- The order is logged in the Client Portal as a "Rejected" order (see Retrieving/viewing non-queued eGift card orders on page 108).

- Our server is triggered to send a notification alert to the eGift card purchaser to indicate their order could not be completed (see "Order Cannot Be Completed" notification on page 86).

Cancelling an entire eGift card order
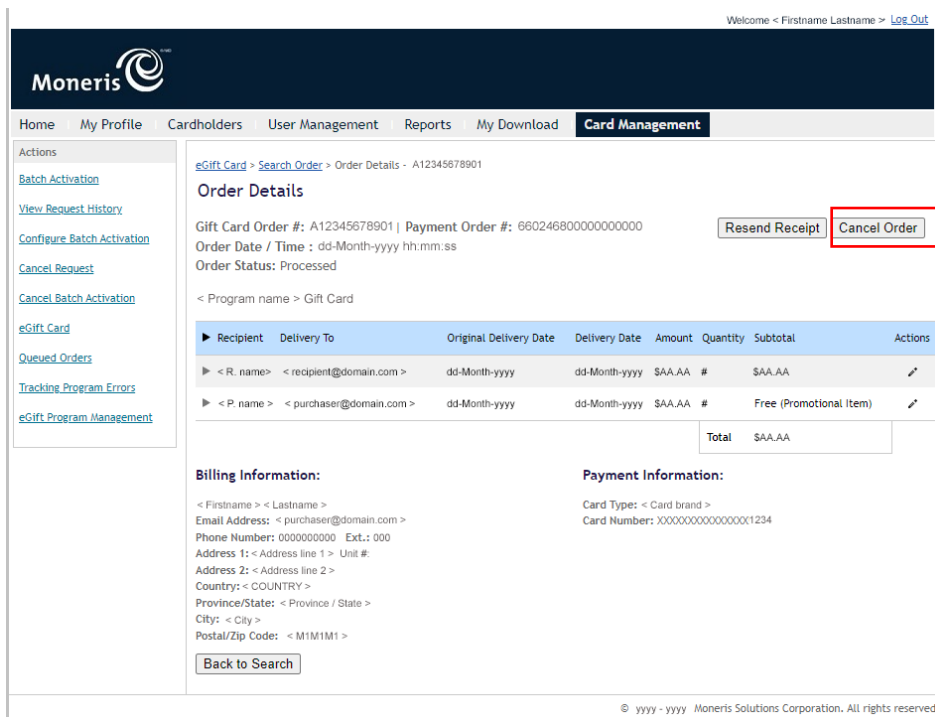
The steps below describe how to cancel an entire eGift card order that we have already successfully processed and completed. Cancelling the entire order permanently deactivates all the eGift card(s) in the order.

Note: *To cancel only part of an order, see Partially cancelling an eGift card order (page 103).*

1. Retrieve the "Processed" order that you want to cancel, and open its "Order Details" page (see Retrieving/viewing non-queued eGift card orders on page 108).

2. When the "Order Details" page (shown below) displays on your screen, go to the next step.

    Note: *For descriptions of line items, see "Order Details" page: processed order (page 116).*

3. Click on the **Cancel Order** button.

4. When the "Cancel Order Confirmation" dialog displays (shown below), click on its **Yes** button.

5. Wait while we process the cancel request (this may take several seconds).

6. When the "Order successfully cancelled" response displays, proceed to reverse the debit/credit transaction used to fund the eGift card order:

   ▪ If you cancelled an order that was completed on the same day (i.e., while your debit/credit batch is still open), proceed to <u>Voiding the debit/credit transaction used to fund an eGift card order</u> (page 144).

   ▪ If you cancelled an order that was completed on the previous day (i.e., after your debit/credit batch closes), proceed to <u>Refunding the debit/credit transaction used to fund an eGift card order</u> (page 148).

Partially cancelling an eGift card order
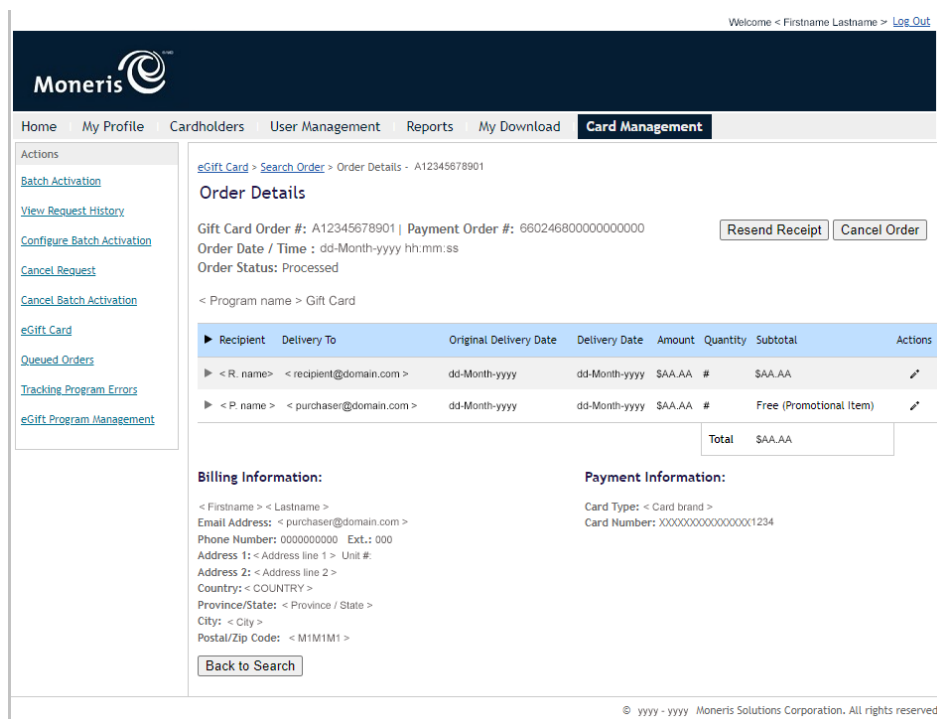
The steps below describe how to partially cancel an eGift card order that we have successfully processed and completed. Partially cancelling an order involves manually deactivating one or more eGift cards in the order and partially refunding the debit/credit transaction used to fund the order.

Note: *To cancel an entire eGift card order, see* <u>*Cancelling an entire eGift card order*</u> *(page 101).*

1. Retrieve the "Processed" order that you want to partially cancel, and open its "Order Details" page (see <u>Retrieving/viewing non-queued eGift card orders</u> on page 108).

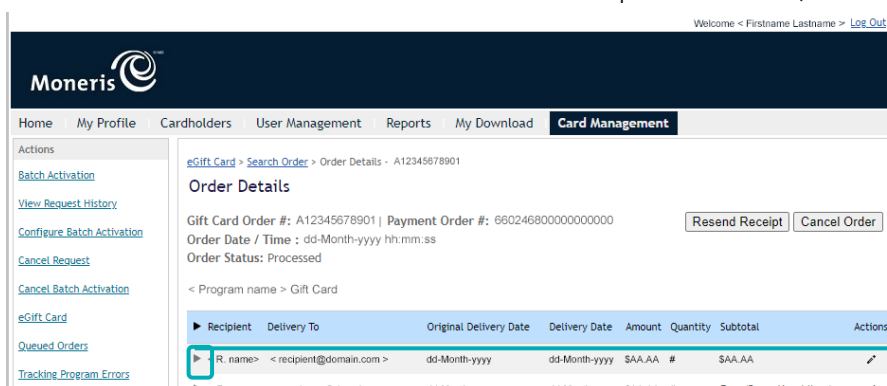2. When the "Order Details" page (shown below) displays on your screen, do the following:

   Note: *For descriptions of line items, see* <u>*"Order Details" page: processed order*</u> *(page 116).*

   a. Locate the recipient to whom you sent the eGift card(s) that you now want to deactivate, and click on the "more items" ▶ icon beside the recipient's name (shown below).

![Moneris logo]

b. When the "card details" bar displays (shown below), record/copy the full "Card Number" to your clipboard.

Note: *The "order update details" bar displays only if you/an administrative user updated the purchaser's original delivery/notification details.*

c. Repeat steps 2a to 2b for any other eGift card that you want to deactivate in this order.

d. When you are finished, go to step 3.

3. Go to the menu bar (shown below), and click on **Cardholders**.
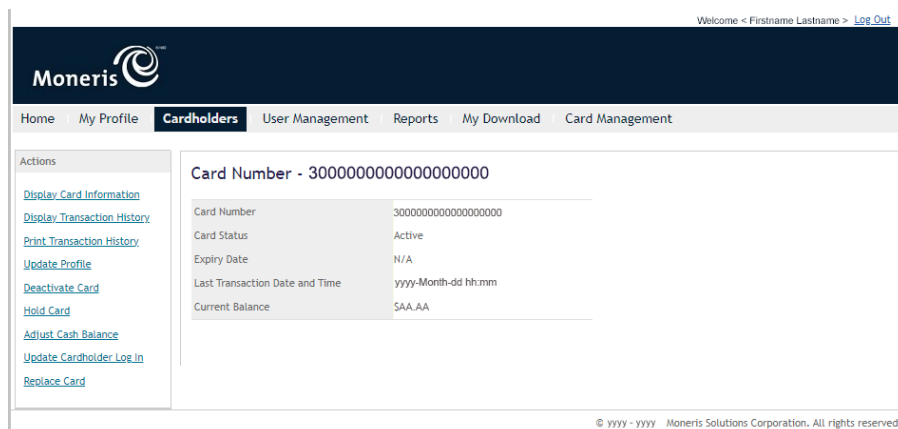
4. When the "Lookup Cardholder" page displays (shown below), do the following:
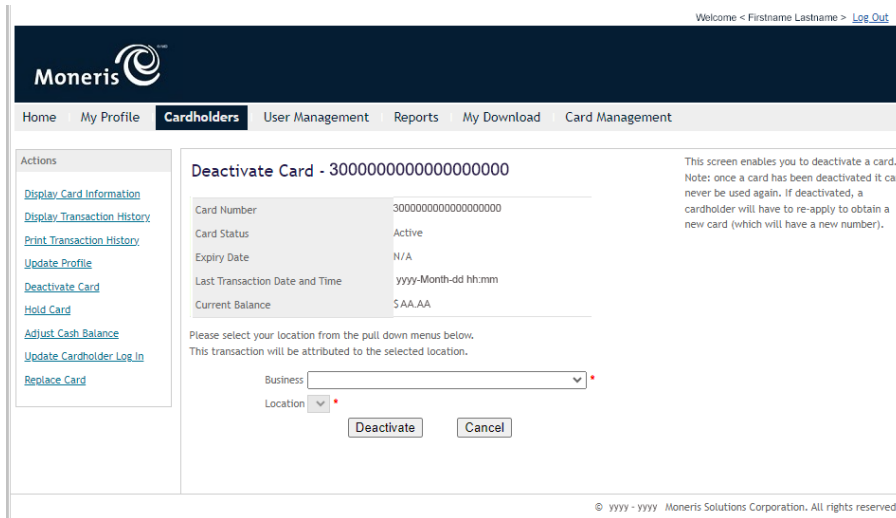
a. In the **Card Number** field, enter the card number of the eGift card that you want to permanently deactivate.

b. Click on the **Search** button.

5. When the "Card Number" page displays (shown below), go to the "Actions" navigation pane and click on **Deactivate**.
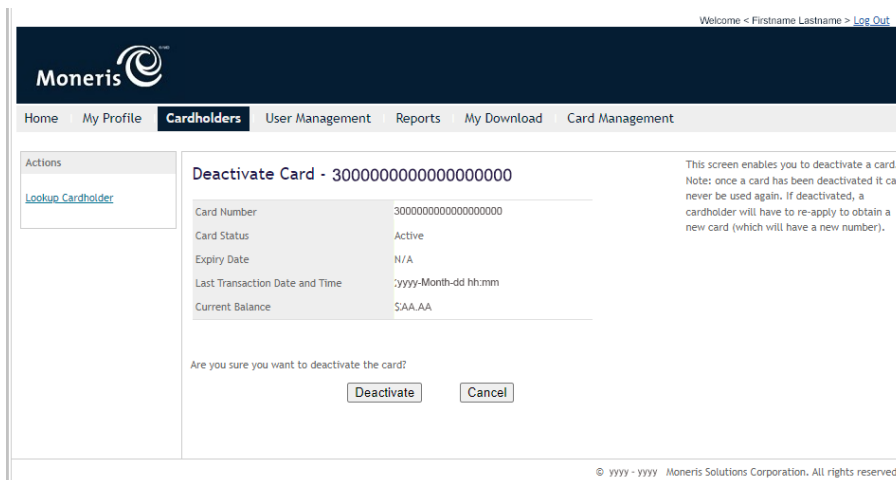
6. When the "Deactivate Card" page displays (shown below), do the following:
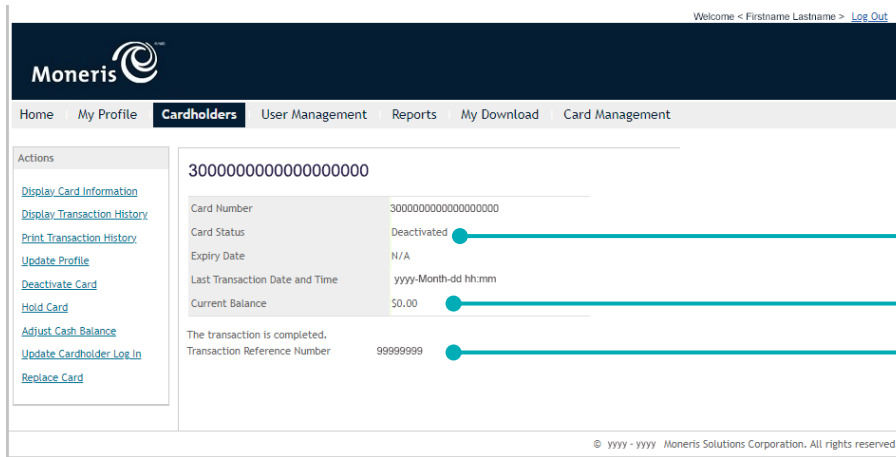
a. If the "Business" drop-down displays, click on it and select your business.

b. If the "Location" drop-down displays, click on it and select a location to which the transaction is to be attributed.

c. Click on the **Deactivate** button.

7. When the "Are you sure you want to deactivate the card?" response displays (shown below), click on the **Deactivate** button.

8. When the "The transaction is completed" response displays (shown below), the operation is complete.

"Card status: Deactivated"

"Current Balance: $0.00"

"The transaction is completed. Transaction Reference Number..."

9. For every other card that you want to deactivate in the order, repeat step 3 to step 8 of this procedure. Otherwise, when you are finished deactivating cards, go to step 10.

10. Proceed to partially refund the debit/credit transaction used to fund the deactivated eGift cards in the order (see Refunding the debit/credit transaction used to fund an eGift card order (page 148).

![Moneris logo]

Retrieving/viewing non-queued eGift card orders

The steps below describe how to retrieve one or more non-queued eGift card orders by using either the purchaser's email or the eGift card order number as the search criterion. Once you retrieve an order, you can opt to view the order details from its "Order Details" page and take further action such as resending a notification or cancelling the order.

Note: A non-queued eGift card order has the status "Processed", "Rejected", "Declined", or "Cancelled". To view a list of queued orders, see Viewing queued eGift card orders on page 96. (See also Order status definitions on page 156 for additional status types.)

1. Log into the Client Portal (see Logging into the Client Portal on page 67).

2. When you are logged in, click on **Card Management** in the menu bar (shown below).
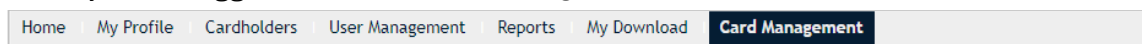
3. On the "Actions" navigation pane (shown below), click on **eGift Card**.
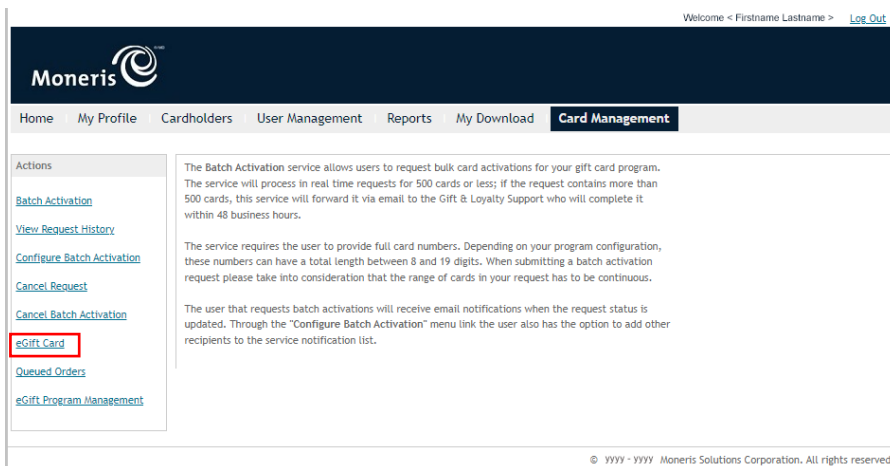
4. When the "Search Order" page displays (shown below), do one of the following:
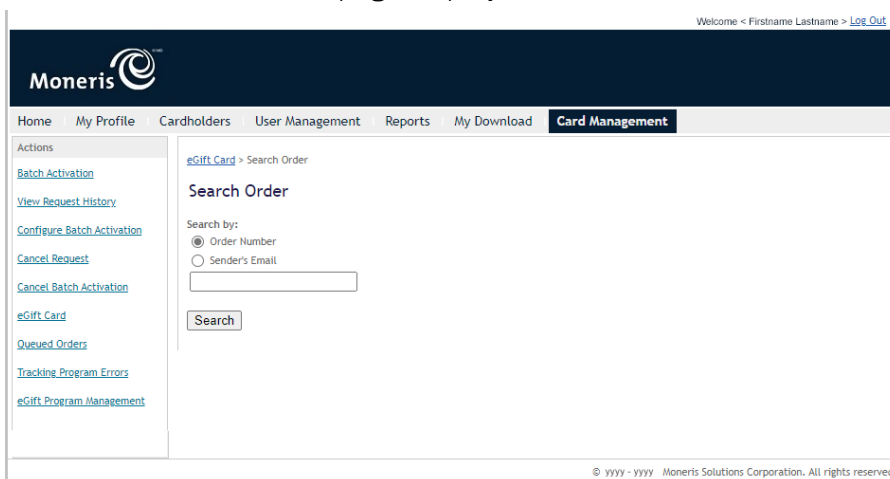
To search by order number:

a. Select the **Order Number** radio button.

b. In the field, enter the "Gift Card Order#" of the desired order.

c. Click on the **Search** button to display the order's "Order Details" page:

- Processed order: see "Order Details" page: processed order (page 116).
- Rejected order: see "Order Details" page: rejected order (page 120).
- Declined order: see "Order Details" page: declined order (page 122).
- Cancelled order: see "Order Details" page: cancelled order (page 124).

To search by email address:

a. Select the **Sender's Email** radio button.

b. In the field, enter the email address of the purchaser who submitted the order.

c. Click on the **Search** button.

d. When the "Orders placed by < purchaser@domain.com >" page displays (shown below), it lists all the orders that were submitted by a purchaser using a specific recurring email address.

Note: Only orders having the status "Processed", "Rejected", "Cancelled", and "Declined" are listed.

List details include "Order #", "Order Date/Time" (dd-Month-yyyy / hh:mm:ss), "Order Status", and "Total" (dollar value of order).

e. To view the "Order Details" page of a specific order, click on the "Order #" link of the desired order:

- Processed order: see "Order Details" page: processed order (page 116).
- Rejected order: see "Order Details" page: rejected order (page 120).
- Declined order: see "Order Details" page: declined order (page 122).
- Cancelled order: see "Order Details" page: cancelled order (page 124).

![Moneris logo]

Resending a "Thank you for shopping with us!" notification

Follow the steps below to resend an order summary/receipt notification to the eGift card purchaser (see <u>"Thank you for shopping with us!": order summary notification</u> on page 89).   You can change the notification language (English or French) and/or the delivery address.

1. Retrieve the desired "Processed" order, and open its "Order Details" page (see <u>Retrieving/viewing non-queued eGift card orders</u> on page 108).

2. On the "Order Details" page (shown below), click on the **Resend Receipt** button.

   Note: *For descriptions of line items, see* <u>*"Order Details" page: processed order*</u> *(page 116).*

3. When the "eGift Resend Receipt" dialog displays (shown below), do the following:

   a. To change the notification language to English, click on the **English** radio button, or click on the **French** radio button to change the notification language to French.

   b. To change the notification address, edit the address in the **Email** field.

   c. Click on the **Resend** button to close the dialog.

   d. When the "Successfully resent to the purchaser" response displays, the operation is complete.

   Note: *The response may read incorrectly as "Successfully resent to the recipient".*

![Moneris logo]
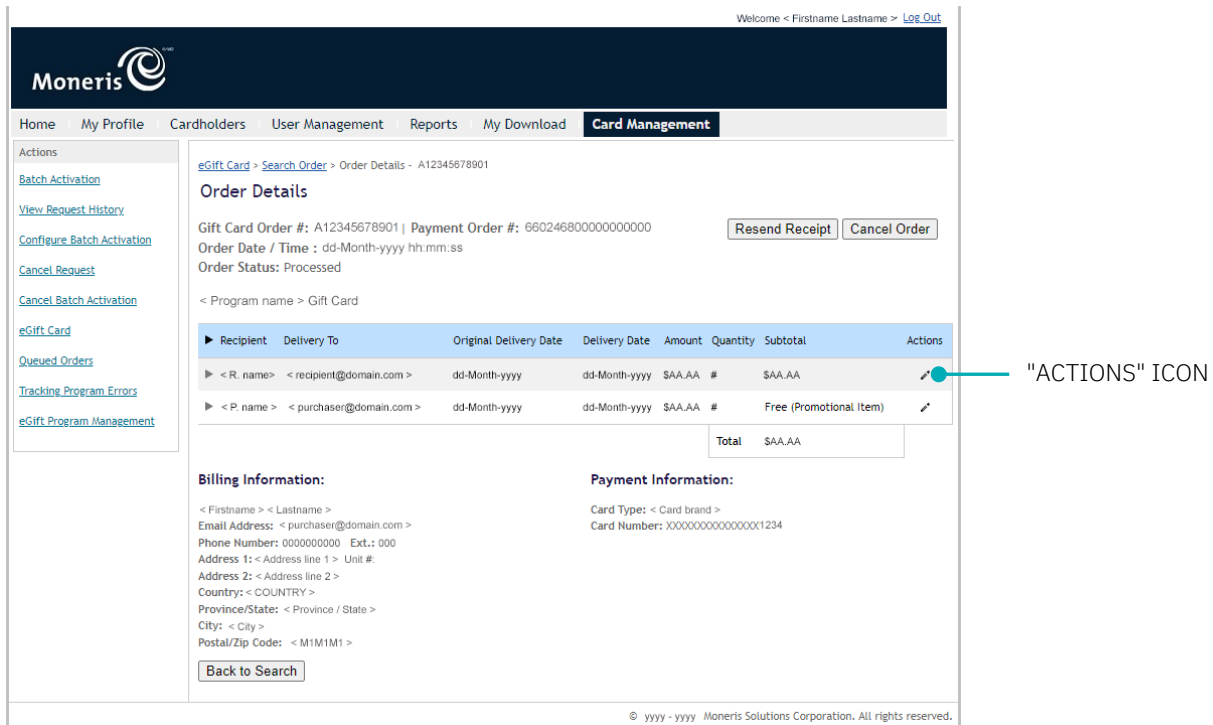
Resending a "Recipient, you've received a $AA eGift Card!" notification

The steps below describe how to resend a non-promotional eGift card notification and/or update other delivery details, including delivery method, address/mobile phone number, delivery date, and language (English/French). This notification contains the link to recipient's eGift card (see "Recipient, you've received a $AA eGift Card!" notification page 91).

Note: *To resend a promotional eGift card notification, see Resending a "Thank you for your purchase" notification (page 113).*

1. Retrieve the desired "Processed" order, and open its "Order Details" page (see Retrieving/viewing non-queued eGift card orders on page 108).

2. On the "Order Details" page (shown below), locate the recipient to whom you want to resend the notification, and click on their **Actions** ✒ icon.

   Note: *For descriptions of line items, see "Order Details" page: processed order (page 116).*

3. When a "Delivery Method" dialog displays (shown on the next page), do any of the following:

To send the notification by email/change the email address:

a. Click on the "Resend To" drop-down, and select **Email**.

b. In the **Email** field, enter/edit the email address.

c. To change the delivery date to a date other than today, enter the new date (dd/mm/yyyy) in the **New Delivery Date** field.

d. To change the notification language to English, click on the **English** radio button. Otherwise, click on the **French** radio button to change the notification language to French.

e. Click on the **Resend** button.

f. When the "Successfully updated recipient's resend delivery date" response displays, the operation is complete.

To send the notification by SMS text/change the phone number:

a. Click on the "Resend To" drop-down, and select **SMS/Text**.

b. In the **SMS/Text** field, enter/edit the mobile phone number.

c. To change the delivery date to a date other than today, enter the new date (dd/mm/yyyy) in the **New Delivery Date** field.

d. To change the notification language to English, click on the **English** radio button. Otherwise, click on the **French** radio button to change the notification language to French.

e. Click on the **Resend** button.

f. When the "Successfully updated recipient's resend delivery date" response displays, the operation is complete.

![Moneris logo]

Resending a "Thank you for your purchase" notification

The steps below describe how to resend a promotional eGift card notification alert to a purchaser and/or update other notification delivery details, including email address, delivery date, and language (English/French). This notification contains the link to the purchaser's free promotional eGift card(s) (see "Thank you for your purchase" notification on page 90).

1. Retrieve the desired "Processed" order, and open its "Order Details" page (see Retrieving/viewing non-queued eGift card orders on page 108).

2. On the "Order Details" page (shown below), locate the recipient of the "Free (Promotional Item)", and click on their **Actions** ✎ icon.

   Note: For descriptions of line items, see "Order Details" page: processed order (page 116).

3. When the "Delivery Method" dialog displays (shown below), do the following:

   a. In the **Email** field, optionally edit the email address.

   b. To change the delivery date to a date other than today, enter the new date (dd/mm/yyyy) in the **New Delivery Date** field.

   c. To change the notification language to English, click on the **English** radio button. Otherwise, click on the **French** radio button to change the notification language to French.

   d. Click on the **Resend** button.

   e. When the "Successfully updated recipient's resend delivery date" response displays, the operation is complete.
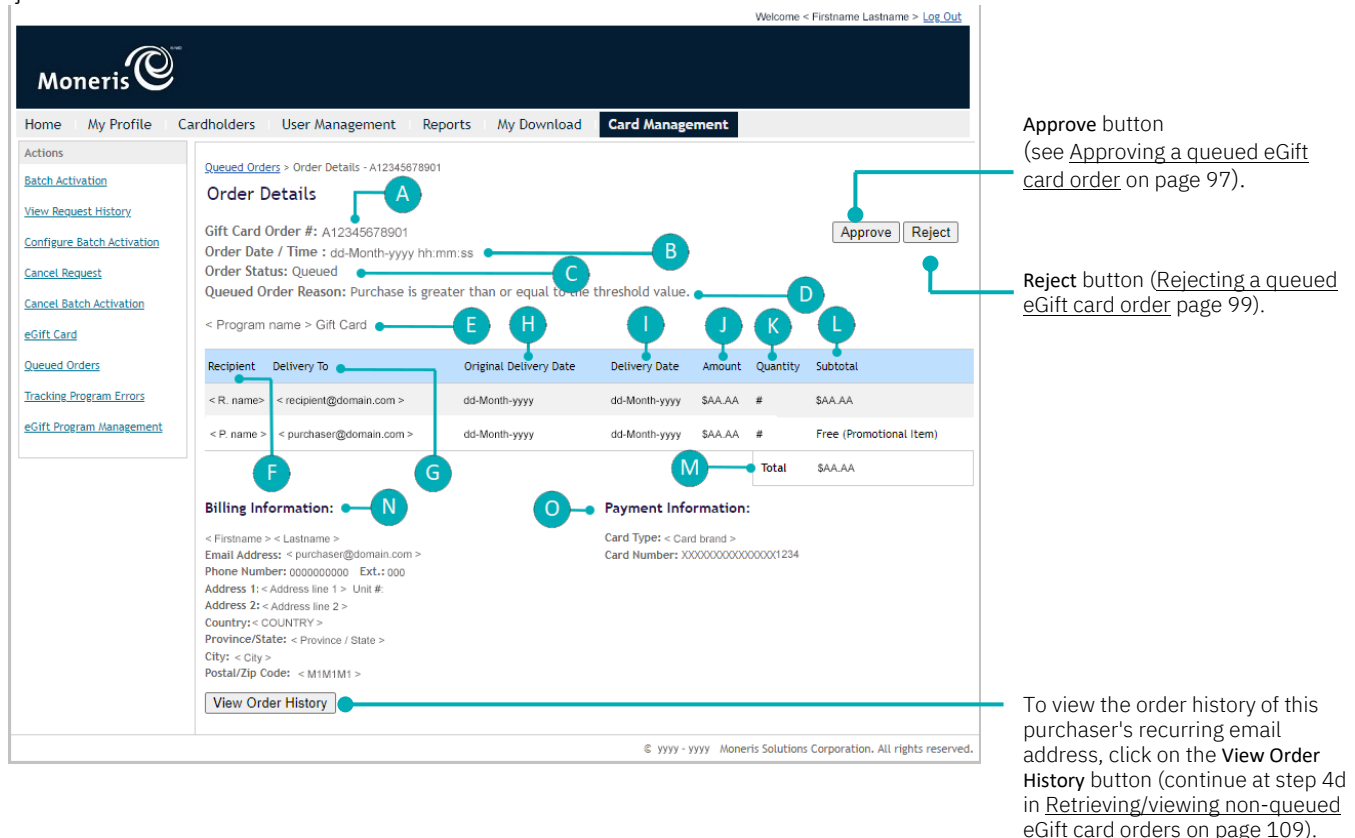
"Order Details" page

"Order Details" page: queued order

A queued order is an order that is routed to the queue because the order amount equals or exceeds the purchase amount threshold set for your eGift card program. The order awaits your approval or rejection. The "Order Details" page of a queued order (shown below) displays all the information about the order, including billing and payment details, delivery details, and dollar totals. You can approve or reject the order as described below.

Approve button (see Approving a queued eGift card order on page 97).

Reject button (Rejecting a queued eGift card order page 99).

To view the order history of this purchaser's recurring email address, click on the **View Order History** button (continue at step 4d in Retrieving/viewing non-queued eGift card orders on page 109).
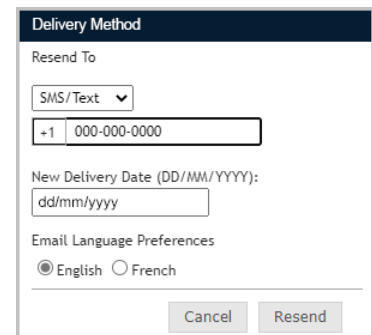
This table describes the labelled image of the "Order Details" page shown above.
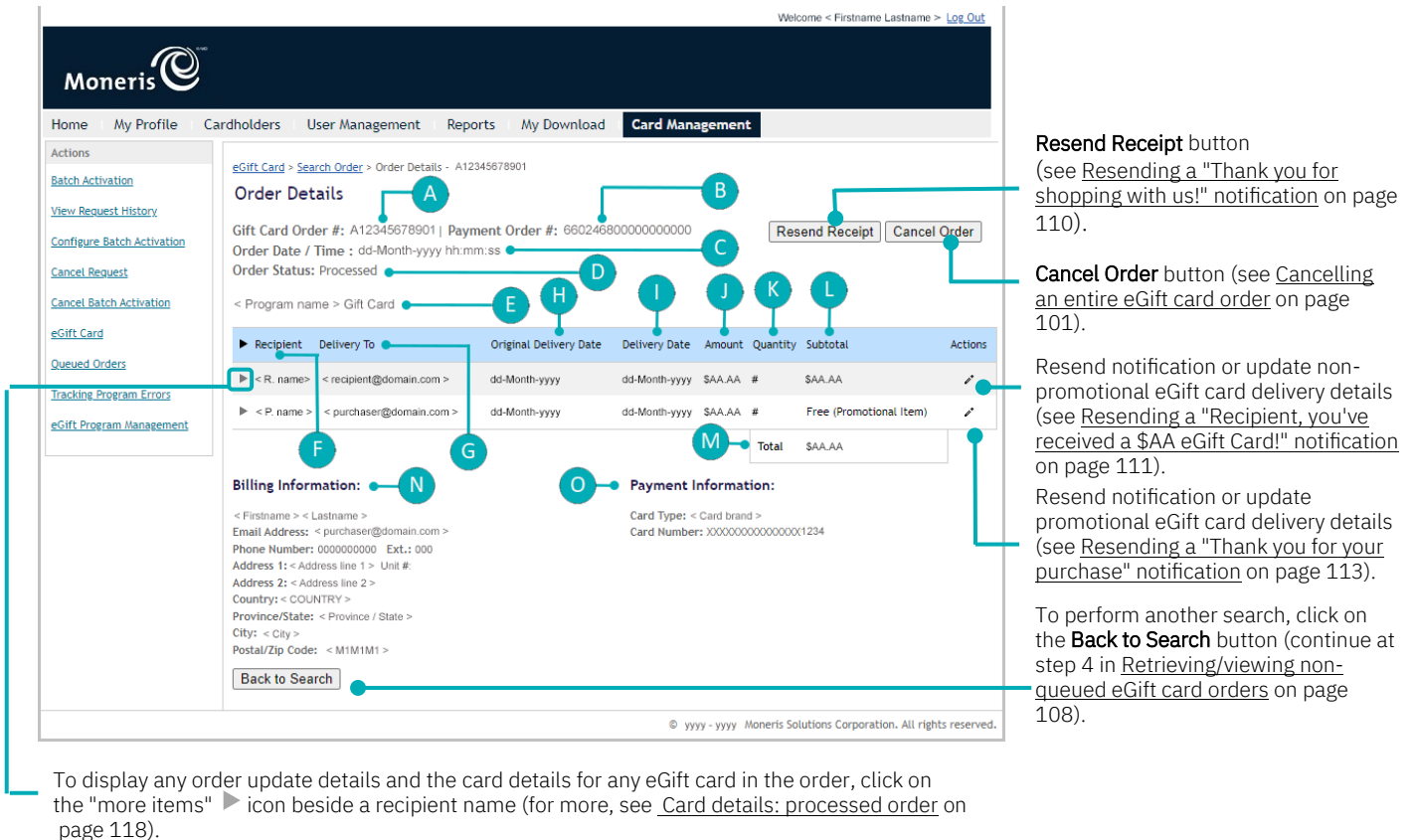
Label	Line item	Description
A	"Gift Card order #"	Unique identifier appended to the order.
B	"Order Date / Time"	Date (dd-Month-yyyy / hh:mm/ss) on which the purchaser submitted the order.
C	"Order Status"	Indicates "Queued".
D	"Queued Order Reason"	Indicates reason for queuing (i.e., purchase is greater then or equal to threshold value).
E	"< Program name > Gift Card"	Moneris program identifier.
F	"Recipient"	eGift card recipient name/nickname
G	"Delivery To"	Delivery email address/mobile phone number as originally specified by the purchaser when they submitted the order. *Note: Any promotional card(s) will be auto-sent to the purchaser's email address if the order is approved and successfully processed to completion.*
H	"Original Delivery Date"	eGift card delivery date (dd-Month-yyyy) that was originally scheduled by the purchaser when they submitted the order. *Note: Any promotional card(s) for which the purchaser qualifies will be sent to them on the date the order is approved and successfully processed to completion.*

Label	Line item	Description
I	"Delivery Date"	Date (dd-Month-yyyy) of the first occurrence an attempted eGift card delivery to a recipient in this order. *Note:* *Because the order is queued, this date may differ from the actual date on which the eGift card is sent to the recipient (i.e., once the order is approved and successfully processed to completion).*
J	"Amount"	Dollar amount to be loaded on the eGift card(s) that will be sent to a recipient if the order is successfully processed and completed.
K	"Quantity"	Number of eGift cards to be sent to a recipient if the order is approved and successfully processed to completion.
L	"Subtotal"	Total dollar value of eGift card(s) to be sent to a recipient if the order is approved and successfully processed to completion.
M	"Total"	Total dollar value of all eGift cards in the order, excluding any free promotional cards. *Note:* *The total dollar value of the order is funded by the purchaser's debit/credit card if the order is approved and successfully processed to completion.*
N	"Billing Information"	Purchaser "Email Address", "Phone Number", "Ext.", "Address 1", "Address 2", "Unit#", "Country", "City", and "Postal/Zip Code".
O	"Payment Information"	"Card Type" (brand) and "Card Number" (masked debit/credit card number except for last 4 digits) of the payment card to be used to fund the non-promotional eGift card(s) in the order if the order is approved and successfully processed to completion.

"Order Details" page: processed order

A processed order is an eGift card order that we completed, resulting in the creation of one or more eGift cards per the specifications in the order (see Placing an order on page 57). The "Order Details" page of a processed order (shown below) displays all the information about the order, including billing and payment details, delivery details, and eGift card details, including dollar totals, and card number. You may opt to resend a receipt or notification or cancel the order as described below.

Note: To view the "Order Details" page of a processed order, see Retrieving/viewing non-queued eGift card orders (page 108). See also Enterprise and exception eGift card reports (page 128) for additional order details.

To display any order update details and the card details for any eGift card in the order, click on the "more items" ▶ icon beside a recipient name (for more, see Card details: processed order on page 118).

This table describes the labelled image of the "Order Details" page shown above

Label	Line item	Description
A	"Gift Card order #"	Unique identifier appended to the order in the Client Portal. This identifier also constitutes the last portion of the "Order Number" shown in the "Thank you for shopping with us!" notification that we send to the purchaser upon completion of their order. See "Thank you for shopping with us!": order approved notification on page 88), or see "Thank you for shopping with us!": order summary notification (page 89). The "Order Number" is referred to as "Order ID" in the Merchant Resource Center and is appended to the debit/credit transaction used to fund the order. *Note: You can use this identifier to retrieve the order in the Client Portal (see Retrieving/viewing non-queued eGift card orders on page 108, or see Enterprise and exception eGift card reports on page 128). You can use this identifier in the Merchant Resource Center to retrieve the debit/credit transaction used to fund the order.*
B	"Payment Order #"	A unique identifier (referred to as the "Sequence number" in the Merchant Resource Center. Appended to the debit/credit transaction used to fund the order).
C	"Order Date / Time"	Date (dd-Month-yyyy) and time (hh:mm:ss) when the purchaser submitted the order.
D	"Order Status"	Indicates "Processed".

Label	Line item	Description
E	"< Program name > Gift Card"	Moneris program identifier.
F	"Recipient"	eGift card recipient name/nickname.
G	"Delivery To"	Non-promotional eGift card: Delivery email address/mobile phone number of the recipient as originally specified by the purchaser when they submitted the order. Promotional eGift card: Purchaser's email address as specified by the purchaser when they submitted the order.
H	"Original Delivery Date"	eGift card delivery date (dd-Month-yyyy) that was originally scheduled by the purchaser when they submitted the order. *Note:* *Any promotional card(s) for which the purchaser qualified would have been delivered on the date the order was approved.*
I	"Delivery Date"	Date (dd-Month-yyyy) of the last occurrence of an eGift card delivery to a recipient in this order (e.g., this date may change if an administrative user subsequently resends the eGift card notification).
J	"Amount"	Dollar amount loaded on the eGift card(s) that were sent to a recipient.
K	"Quantity"	Number of eGift cards that were sent to a recipient.
L	"Subtotal"	Total dollar value of eGift card(s) that were sent to a recipient.
M	"Total"	Total dollar value of all eGift cards in the order, excluding any free promotional cards. *Note:* *The total dollar value of the order is funded by the purchaser's debit/credit card.*
N	"Billing Information"	Purchaser "Email Address", "Pone Number", "Ext.", "Address 1", "Address 2", "Country", "City", and "Postal/Zip Code".
O	"Payment Information"	"Card Type" (brand) and "Card Number" (masked debit/credit card number except for last 4 digits) of the payment card used to fund the non-promotional eGift card(s) in the order.

Card details: processed order

A processed order's "Order Details" page contains details about any eGift card that is part of the order. eGift card details are displayed in the "card details" bar of each recipient (shown below). Details include card account number, card status, and activation ID. If you updated any of the original order details or resent the notification, your activities are logged in the "order update details" bar (shown below).

Note: *For additional options and descriptions of all other non-labelled line items, see <u>"Order Details" page: processed order</u> (page 116).*

To view the eGift card details and any order update details, click on the "more items" ▶ icon beside the recipient name (shown below).

"ORDER UPDATE DETAILS" BAR

"CARD DETAILS" BAR

This table describes the labelled image of the "Order Details" page shown above.
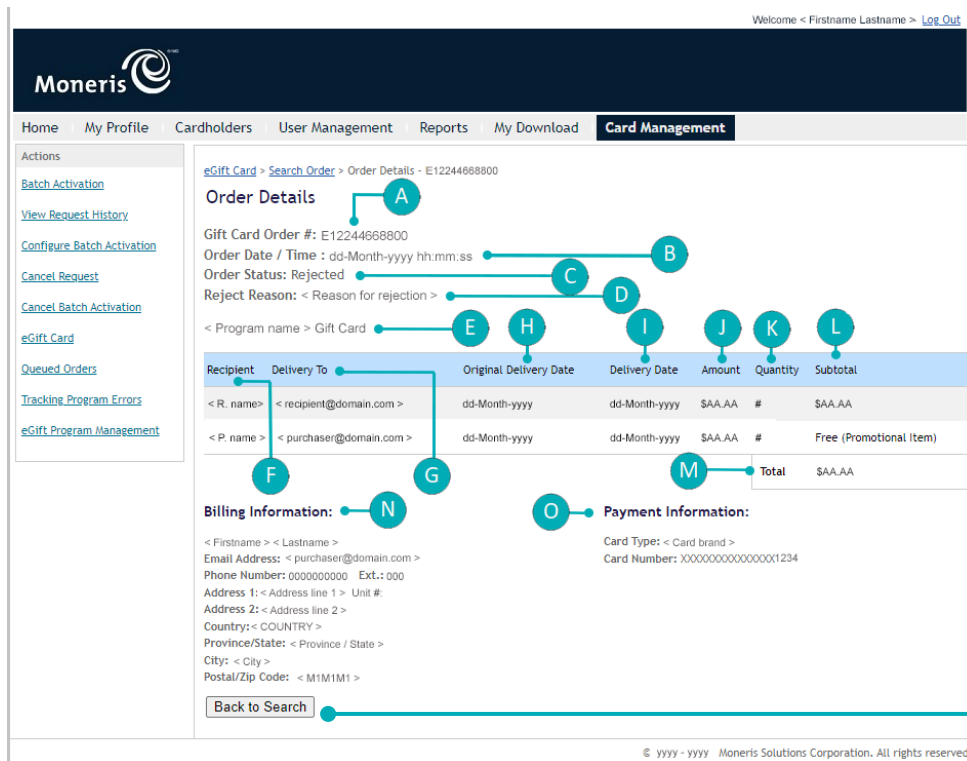
Label	Line item	Description
A	"Delivery date"	Date (dd-Month-yyyy) of the last occurrence of an eGift card delivery to a recipient in this order as scheduled by you/an administrative user).
B	"Previously Delivered To"	Email address/mobile phone number to which the eGift card was previously sent.
C	"Modify User"	The administrator user who effected the last update to the order delivery details.
D	"Change Date"	Date (dd/Month) and time (hh:mm:ss) when you/the administrator user effected an update to the order delivery details.
E	"Card Number"	eGift card account number.

Label	Line item	Description
F	"Status"	Indicates "Downloaded" if the recipient accessed the eGift card via their notification, or Indicates "Processed" if the recipient has not accessed their eGift card via their notification. *Note:* *For recipient notification types, see* <u>*Notification alerts (page 82).*</u>
G	"Program ID"	Your eGift card program identifier.
H	"Activation Transaction ID"	eGift card activation transaction identifier.

"Order Details" page: rejected order

A rejected order is an eGift card order that we initially routed to the order queue but which you subsequently rejected (see Rejecting a queued eGift card order on page 99). The "Order Details" page of a rejected order (shown below) displays all the information about the order, including billing and payment details, delivery details, and dollar totals as described below.

Note: To retrieve a rejected order, see Retrieving/viewing non-queued eGift card orders on page 108.

To perform another search, click on the **Back to Search** button (continue at step 4 in Retrieving/viewing non-queued eGift card orders on page 108).

This table describes the labelled image of the "Order Details" page shown above.

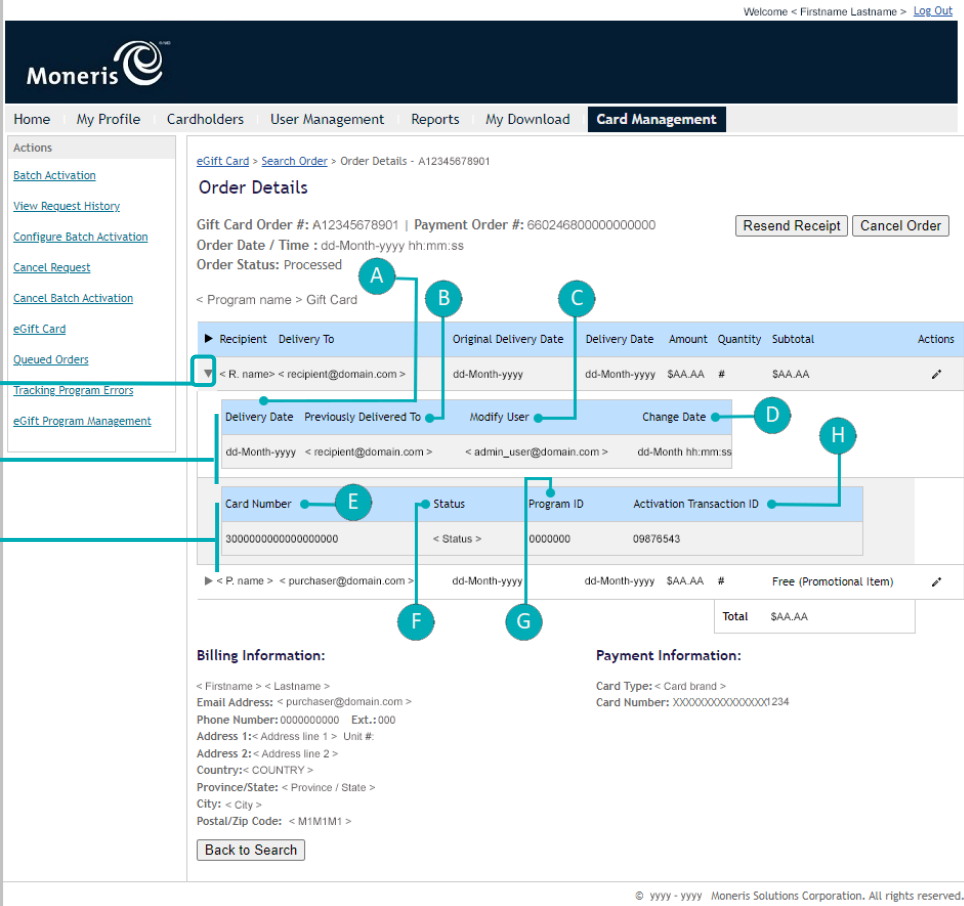| Label	Line item	Description
A	"Gift Card order #"	Unique identifier appended to the order in the Client Portal. *Note: You can use this identifier to retrieve the order in the Client Portal (see Retrieving/viewing non-queued eGift card orders on page 108).*
B	"Order Date / Time"	Date (dd-Month-yyyy) and time (hh:mm:ss) on which the purchaser submitted the order.
C	"Order Status:"	Indicates "Rejected".
D	"Reject Reason"	Indicates the reason for the order rejection.
E	"< Program name > Gift Card"	Moneris program identifier.
F	"Recipient"	eGift card recipient name/nickname.
G	"Delivery To"	Non-promotional eGift card: Delivery email address/mobile phone number of the recipient as originally specified by the purchaser when they submitted the order. Promotional eGift card: Purchaser's email address as specified by the purchaser when they submitted the order.
H	"Original Delivery Date"	eGift card delivery date (dd-Month-yyyy) that was originally scheduled by the purchaser when they submitted the order. *Note: Any promotional card(s) for which the purchaser qualified would have been delivered on the date the order was approved.*

Label	Line item	Description
I	"Delivery Date"	Date (dd-Month-yyyy) of the only occurrence an attempted eGift card delivery to a recipient in this order. *Note:* *Because the order was routed to the queue and subsequently rejected, this date is same as "Original Delivery Date".*
J	"Amount"	Dollar amount that would have been loaded on the eGift card(s) in the order if the order had been approved.
K	"Quantity"	Number of eGift cards that would have been sent to the recipient if the order been approved.
L	"Subtotal"	Total dollar value of eGift card(s) that would have been sent to a recipient if the order been approved.
M	"Total"	Total dollar value of all eGift cards in the order, excluding free promotional cards.
N	"Billing Information"	Purchaser "Email Address", "Phone Number", "Ext.", "Address 1", "Address 2", "Unit#", "Country", "City", and "Postal/Zip Code".
O	"Payment Information"	"Card Type" (brand) and "Card Number" (masked debit/credit card number except for last 4 digits) of the payment card that would have been used to fund the order if the order had been approved.

"Order Details" page: declined order

A declined order is an eGift card order that was submitted but which we could not register due to a system error. The "Order Details" page of a declined order (shown below) displays all the information about the order, including billing and payment details, delivery details, and dollar totals as described below.

Note: *To retrieve a declined order, see Retrieving/viewing non-queued eGift card orders on page 108.*

To perform another search, click on the **Back to Search** button (continue at step 4 in Retrieving/viewing non-queued eGift card orders on page 108).

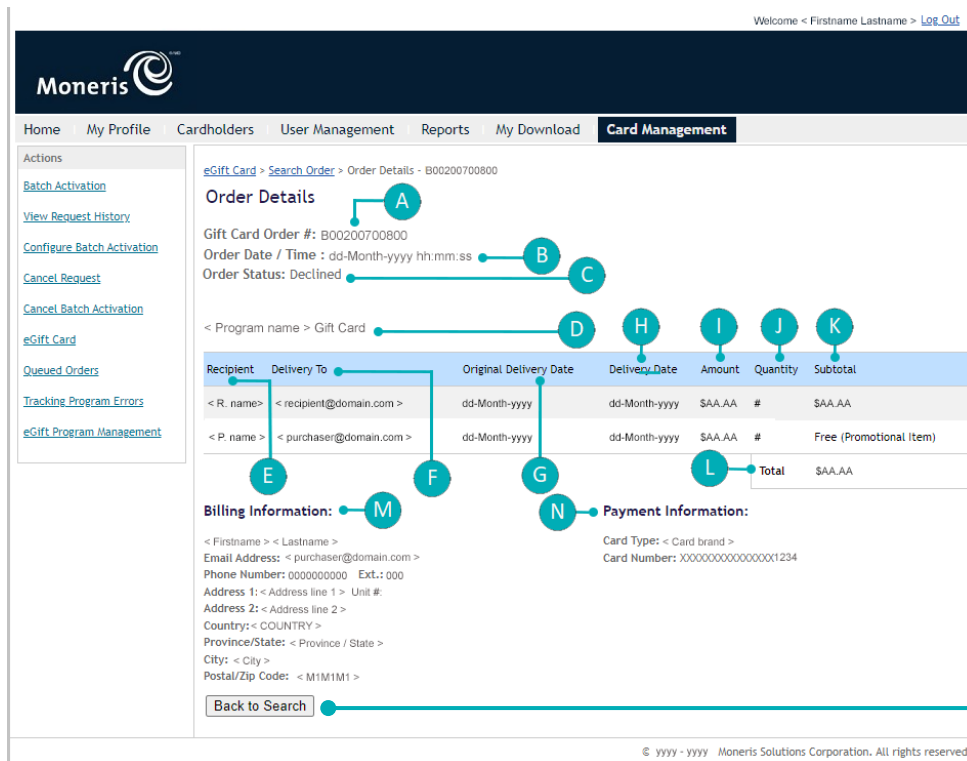This table describes the labelled image of the "Order Details" page shown above.

Label	Line item	Description
A	"Gift Card order #"	Unique identifier appended to the order in the Client Portal. *Note:* *You can use this identifier to retrieve the order in the Client Portal (see Retrieving/viewing non-queued eGift card orders on page 108).*
B	"Order Date / Time"	Date (dd-Month-yyyy) and time (hh:mm:ss) on which the purchaser submitted the order.
C	"Order Status:"	Indicates "Declined".
D	"< Program name > Gift Card"	Moneris program identifier.
E	"Recipient"	eGift card recipient name/nickname.
F	"Delivery To"	Non-promotional eGift card: Delivery email address/mobile phone number of the recipient as originally specified by the purchaser when they submitted the order. Promotional eGift card: Purchaser's email address as specified by the purchaser when they submitted the order.
G	"Original Delivery Date"	eGift card delivery date (dd-Month-yyyy) that was originally scheduled by the purchaser when they submitted the order. *Note:* *Any promotional card(s) for which the purchaser qualified would have been delivered on the date the order was approved.*

Label	Line item	Description
H	"Delivery Date"	Date (dd-Month-yyyy) of the only occurrence an attempted eGift card delivery to a recipient in this order. *Note:* *Because the order was not registered due to a system error, this date is same as "Original Delivery Date".*
I	"Amount"	Dollar amount that would have been loaded on the eGift card(s) and sent to a recipient if the order had been approved.
J	"Quantity"	Number of eGift cards that would have been sent to a recipient if the order been approved.
K	"Subtotal"	Total dollar value of eGift card(s) that would have been sent to a recipient if the order had been approved.
L	"Total"	Total dollar value of all eGift cards in the order, excluding any promotional cards, which are free. *Note:* *The total dollar value would have been funded by the purchaser's debit/credit card.*
M	"Billing Information"	Purchaser "Email Address", "Phone Number", "Ext.", "Address 1", "Address 2", "Unit #", "Country", "City", and "Postal/Zip Code".
N	"Payment Information"	"Card Type" (brand) and "Card Number" (masked debit/credit card number except for last 4 digits) of the payment card that would have been used to fund the eGift card(s) in the order had the order been approved and successfully processed to completion.

"Order Details" page: cancelled order

A cancelled order is an eGift card order that we successfully processed and completed but which you subsequently cancelled (see Cancelling an entire eGift card order on page 101). The "Order Details" page of a cancelled order (shown below) displays all the information about the order, including billing and payment details, delivery details, and dollar totals as described below.

Note: To view the "Order Details" page of a cancelled order, see Retrieving/viewing non-queued eGift card orders on page 108. See also Enterprise and exception eGift card reports (page 128) for additional order details.

To display any order update details and the card details for any eGift card in the order, click on the "more items" ▶ icon beside a recipient name (see Card details: cancelled order on page 126).

To perform another search, click on the **Back to Search** button (continue at step 4 in Retrieving/viewing non-queued eGift card orders on page 108).

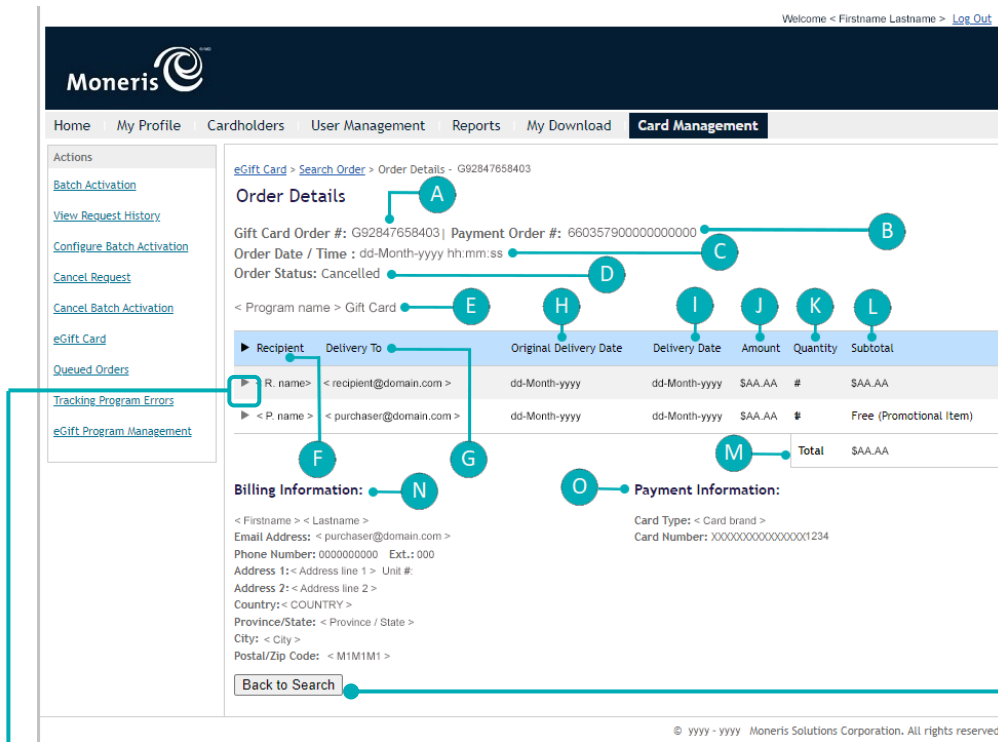This table describes the labelled image of the "Order Details" page shown above.

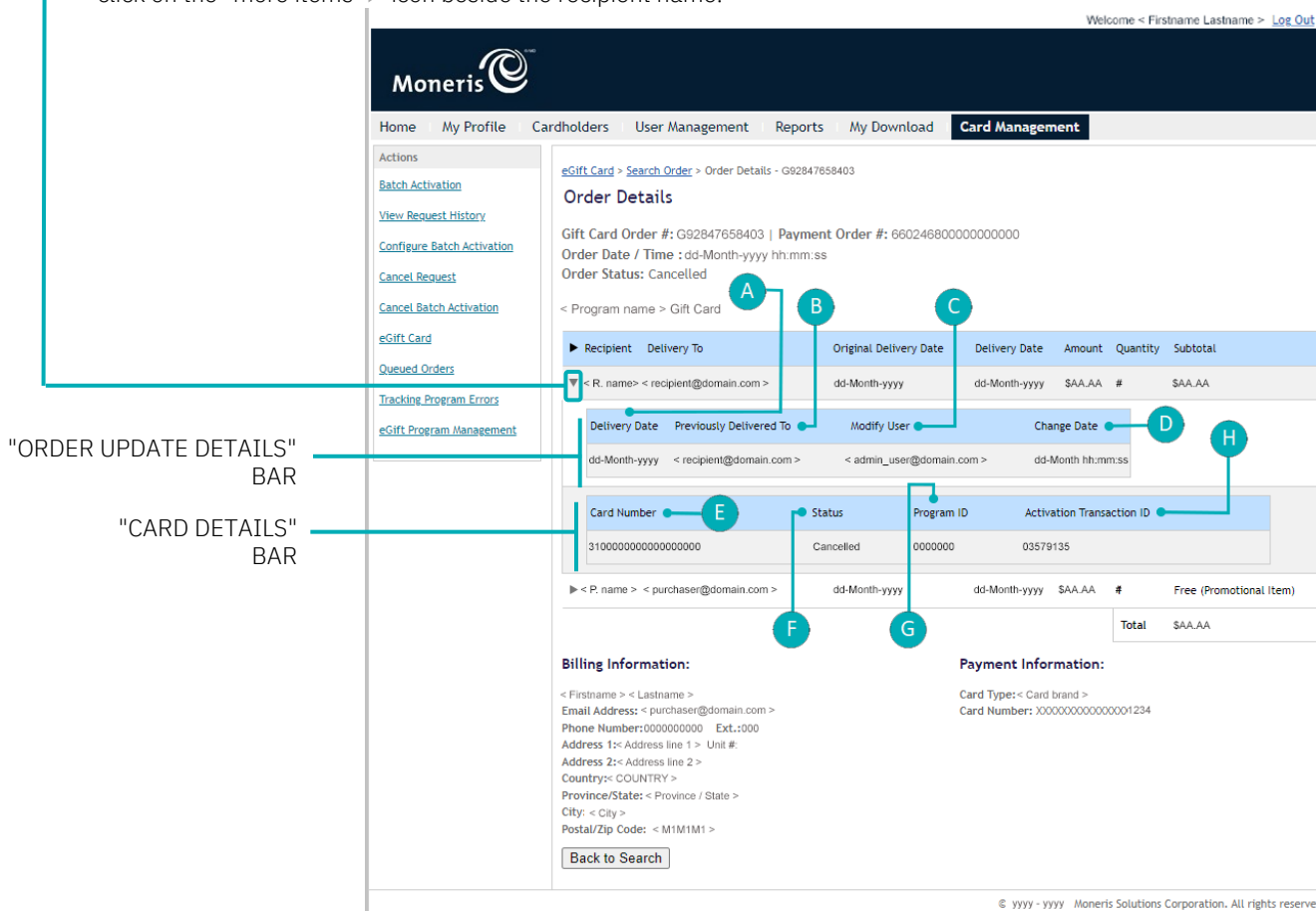| Label	Line item	Description
A	"Gift Card order #"	Unique identifier appended to the order in the Client Portal. This identifier also constitutes the last portion of the "Order Number" shown in the "Thank you for shopping with us!" notification that we send to the purchaser upon completion of their order. See any of: — "Thank you for shopping with us!": order approved notification (page 88) — "Thank you for shopping with us!": order summary notification (page 89) The "Order Number" is referred to as "Order ID" in the Merchant Resource Center and is appended to the debit/credit transaction used to fund the order. *Note: You can use this identifier to retrieve the order in the Client Portal (see Retrieving/viewing non-queued eGift card orders on page 108, or see Enterprise and exception eGift card reports on page 128). You can also use this identifier in the Merchant Resource Center to retrieve the debit/credit transaction used to fund the order.*
B	"Payment Order #"	A unique identifier (referred to as the "Sequence number" in the Merchant Resource Center. Appended to the debit/credit transaction used to fund the order).
C	"Order Date / Time"	Date (dd-Month-yyyy) and time (hh:mm/ss) when the purchaser submitted the order.
D	"Order Status:"	Indicates "Cancelled".

Label	Line item	Description
E	< Program name > Gift Card	Moneris program identifier.
F	"Recipient"	eGift card recipient name/nickname.
G	"Delivery To"	Non-promotional eGift card: Delivery email address/mobile phone number of the recipient as originally specified by the purchaser when they submitted the order. Promotional eGift card: Purchaser's email address as specified by the purchaser when they submitted the order.
H	"Original Delivery Date"	eGift card delivery date (dd-Month-yyyy) that was originally scheduled by the purchaser when they submitted the order. *Note:* *Any promotional card(s) for which the purchaser qualified would have been delivered on the date the order was approved.*
I	"Delivery Date"	Date (dd-Month-yyyy) of the latest occurrence of an eGift card notification delivery to the recipient (e.g., this date may change if an administrative user resends the notification).
J	"Amount"	Dollar amount loaded on the eGift card(s) that were sent to a recipient.
K	"Quantity"	Number of eGift cards that were sent to a recipient.
L	"Subtotal"	Total dollar value of eGift card(s) that were sent to a recipient.
M	"Total"	Total dollar value of all eGift cards in the order, excluding any free promotional cards. *Note:* *The total dollar value of the order is funded by the purchaser's debit/credit card.*
N	"Billing Information"	Purchaser "Email Address", "Phone Number", "Ext.", "Address 1", "Address 2", "Unit #", "Country", "City", and "Postal/Zip Code".
O	"Payment Information"	"Card Type" (brand) and "Card Number" (masked debit/credit card number except for last 4 digits) of the payment card used to fund the eGift card(s) in the order.

Card details: cancelled order

The "Order Details" page of a cancelled eGift card order contains details about any eGift card that is part of the order. eGift card details are displayed in the "card details" bar of each (shown below). Details include card account number, card status, and activation ID. If you updated any of the purchaser's original order details or resent the notification, your activities are logged in the "order update details" bar (shown below).

Note: For additional options and descriptions of all other non-labelled line items, see "Order Details" page: cancelled order (page 124).

To view the eGift card details and any order update details, click on the "more items" ▶ icon beside the recipient name.

"ORDER UPDATE DETAILS" BAR

"CARD DETAILS" BAR

This table describes the labelled image of the "Order Details" page shown above.

Label	Line item	Description
A	"Delivery date"	Date (dd-Month-yyyy) of the last occurrence of an eGift card delivery to a recipient in this order as scheduled by you/an administrative user).
B	"Previously Delivered To"	Email address/mobile phone number to which the eGift card was previously sent.
C	"Modify User"	The administrator user who effected the update to the order delivery details.
D	"Change Date"	Date (dd/Month) and time (hh:mm:ss) when you/the administrator user effected the updates to the delivery details and/or initiated a resend action.
E	"Card Number"	eGift card account number.
F	"Status"	Indicates "Cancelled" *Note: The card is automatically deactivated.*
G	"Program ID"	Your eGift card program identifier.
H	"Activation Transaction ID"	eGift card Activation transaction identifier.

Reports.

In this section we go over everything you need to know to generate reports about eGift card orders, card activity, buyer (purchaser) and recipient activity, and more.

Enterprise and exception eGift card reports

There are several enterprise and exception eGift card reports that you can use to track eGift card orders and card usage, and help you to identify fraudulent activity. These reports are listed below.

Note: Only orders having the status "Completed", "Fulfilled", or "Cancelled" can be retrieved in these reports (see specific report procedure for details).

These reports do not include data about promotional card usage (see Promotional eGift card feature on page 24).

- Enterprise eGift Non-Retrieved Order Details report (page 129).

- Enterprise eGift Order Summary report (page 132).

    - eGift Order (Card) Details sub-report (see 135).

- Exception - Buyer and Recipient email Match on eGift Orders report (page 136).

- Exception - Buyer Frequency on eGift Orders report (page 139).

To export your report to a file, see Exporting a report to a file (page 142).

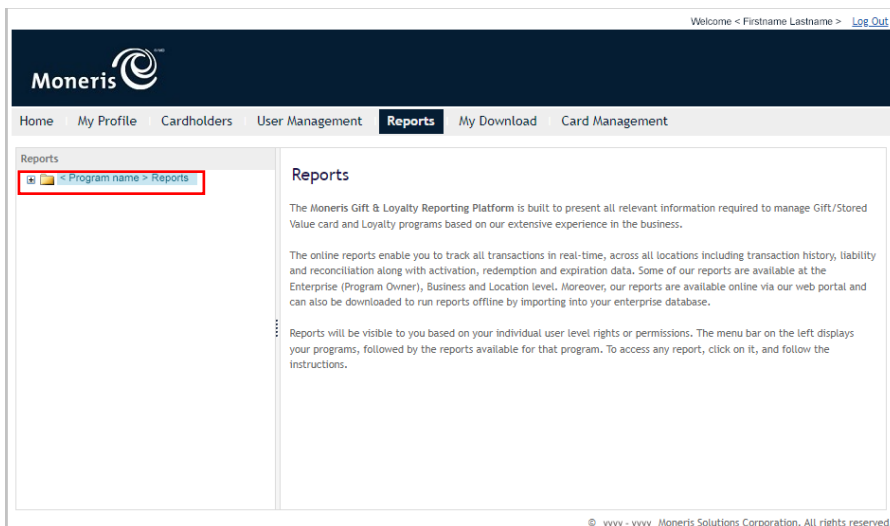# Enterprise eGift Non-Retrieved Order Details report

Follow the steps below to generate a report listing of all orders (submitted through your Moneris eGift iFrame) containing an eGift card that has not been accessed by the intended recipient during a date range you specify. The report includes data only for orders having the status "Completed", "Fulfilled", or "Cancelled" (see Order status definitions on page 156). Report details include order number, delivery and retrieval details, buyer (purchaser) information, and more. You can export the report to a file. Maximum report date range: 366 days.

Note: Ensure your browser is configured to allow pop-ups from this site (the report displays in a pop-up window).
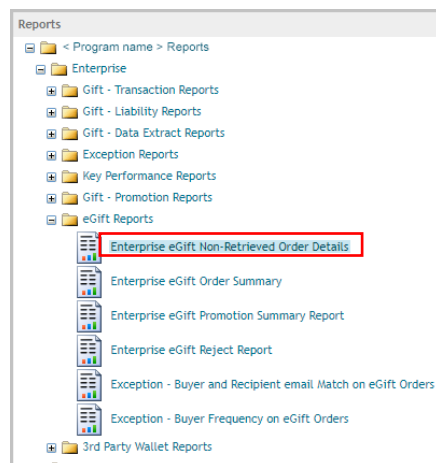
1. Log into the Client Portal (see Logging into the Client Portal on page 67).

2. When you are logged in, click on **Reports** in the menu bar (shown below).

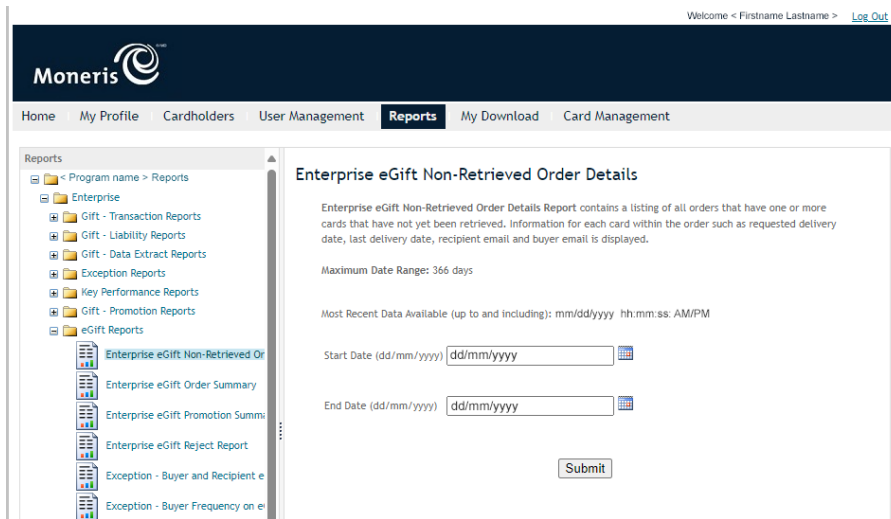| Home | My Profile | Cardholders | User Management | **Reports** | My Download | Card Management |

3. When the "Reports" page displays (shown below), go the "Reports" navigation pane, and click on **< Program name > Reports** to expand the file tree.

4. In the expanded file tree (shown below), click on **Enterprise** > **eGift Reports** > **Enterprise eGift Non-Retrieved Order Details**.
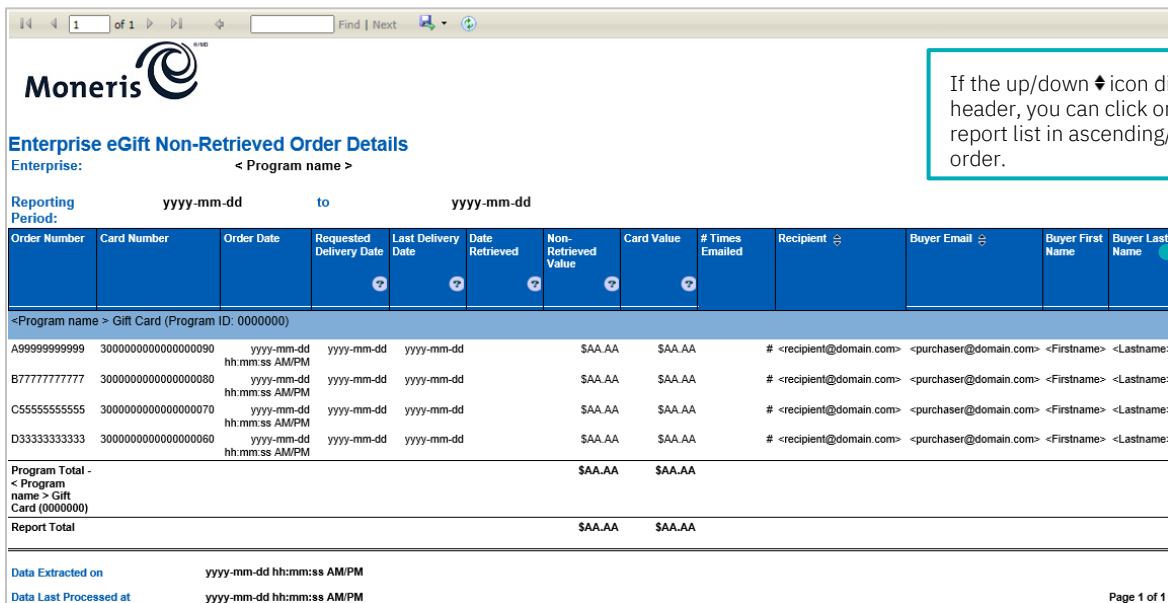
5. When the "Enterprise eGift Non-Retrieved Order Details" page displays (shown below), enter your search criteria:

a. In the **End Date (dd/mm/yyyy)** field, enter the report start date (dd/mm/yyyy), or click on the field and select a date from the calendar.

b. In the **End Date (dd/mm/yyyy)** field, enter the report end date (dd/mm/yyyy), or click on the field and select a date from the calendar.

c. Click on the **Submit** button, and wait while the request is processed.

6. When the report generates (shown below), it displays in an external pop-up window.

Note: *The table on the next page describes the data shown in the Enterprise eGift Non-Retrieved Order Details report shown below.*

If the up/down ⬍ icon displays beside a header, you can click on it to re-sort the report list in ascending/descending order.

- To export the report to a file, see <u>Exporting a report to a file</u> (page 142).

This table describes the Enterprise eGift Non-Retrieved Order Details report shown on the previous page.[49]

Report header	Description
Order Number	Unique identifier applied to the order.
Card Number	Card number of an eGift card in the order.
Order Date	Date (yyyy-mm-dd + hh:mm:ss) on which the buyer (purchaser) submitted the order.
Requested Delivery Date	Delivery date (yyyy-mm-dd) originally scheduled by the buyer (purchaser).
Last Delivery Date	Date (yyyy-mm-dd) of the last occurrence of an attempted eGift card delivery to the recipient.
Date Retrieved	Date (yyyy-mm-dd) on which the eGift card was first accessed by the recipient.
Non-Retrieved Value	If the value appears as "$0.00", it means the recipient has accessed their eGift card. *Note:* *This field is not indicative of the current balance of the card.*
Card Value	Dollar amount originally loaded on the eGift card upon card activation.
# Times Emailed	Total number of times the eGift card notification was sent to the recipient.
Recipient	Recipient email address to which eGift card notification was sent.
Buyer Email	Email address of the buyer (purchaser) who submitted the order.
Buyer First Name	First name of the buyer (purchaser) who submitted the order.
Buyer Last Name	Last name of the buyer (purchaser) who submitted the order.

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[49] Data for promotional cards are not included in this report.
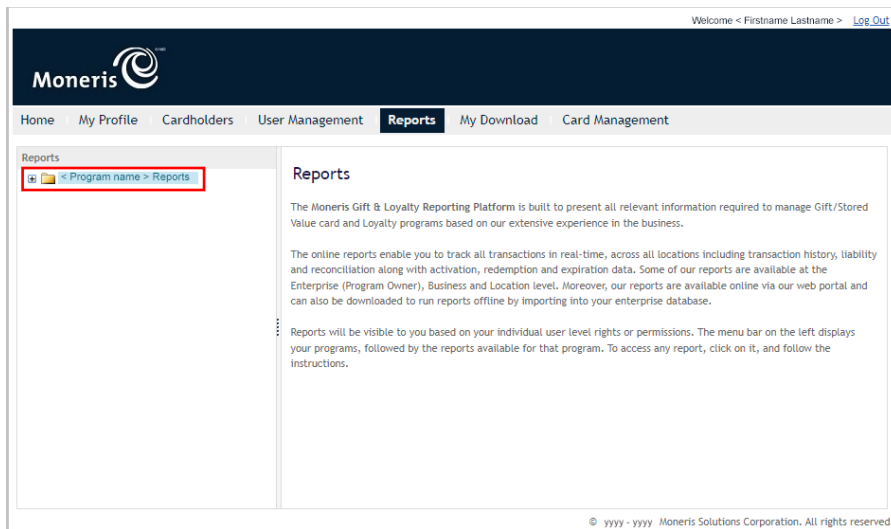
Enterprise eGift Order Summary report

The steps below describe how to generate a report listing of all eGift card orders (submitted through your Moneris eGift iFrame) that have the status "Completed", "Fulfilled", or "Cancelled" (see Order status definitions on page 156). Report details include total order amount, number of cards ordered and retrieved, card value, buyer information, and more. You can also view card and delivery details for all cards included in an order, and you can export the report to a file. Maximum report date range: 45 days.

Note: Ensure your browser is configured to allow pop-ups from this site (the report displays in a pop-up window).

1. Log into the Client Portal (see Logging into the Client Portal on page 67).

2. When you are logged in, click on **Reports** in the menu bar (shown below).
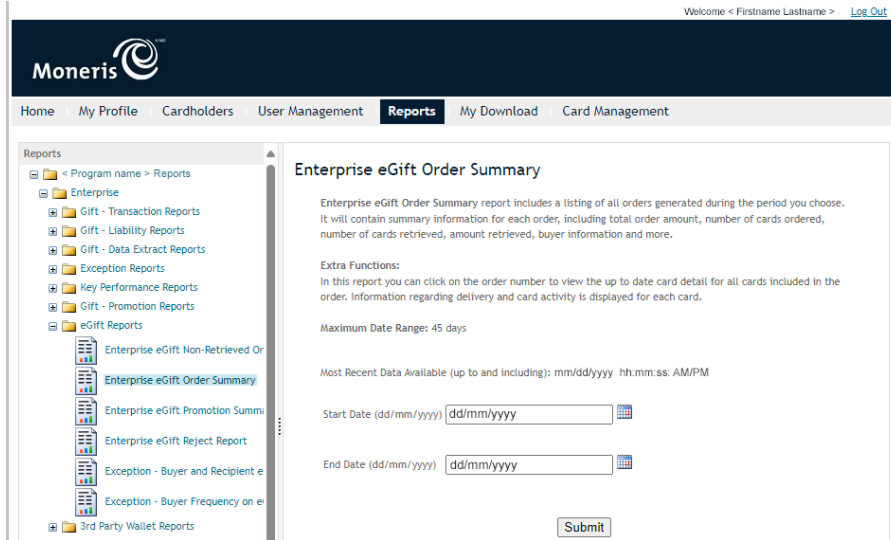

3. When the "Reports" page displays (shown below), go the "Reports" navigation pane, and click on the < **Program name > Reports** folder to expand the file tree.

4. In the expanded file tree (shown below), click on **Enterprise > eGift Reports > Enterprise eGift Order Summary**.
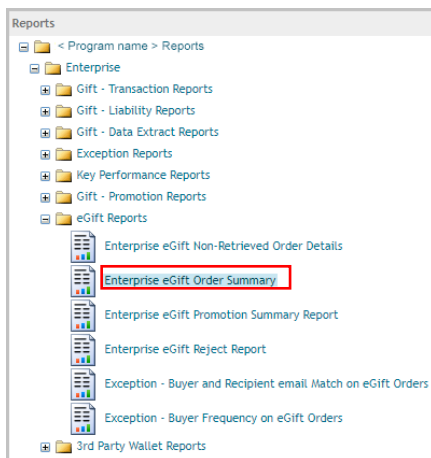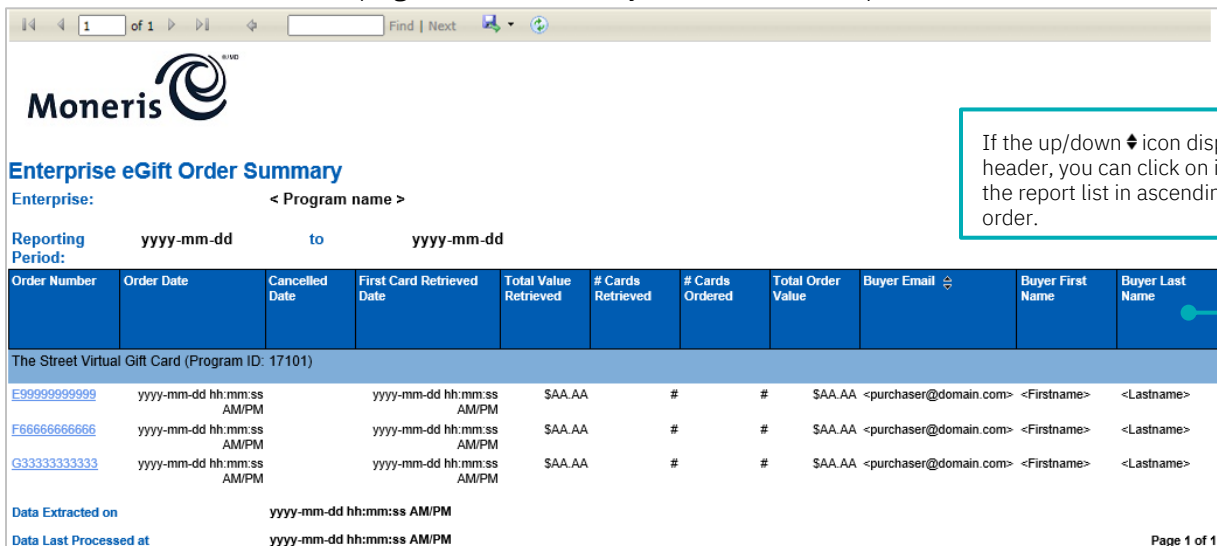
5. When the "Enterprise eGift Order Summary" page displays (shown below), enter your search criteria:

a. In the **End Date (dd/mm/yyyy)** field, enter the report start date (dd/mm/yyyy), or click on the field and select a date from the calendar.

b. In the **End Date (dd/mm/yyyy)** field, enter the report end date (dd/mm/yyyy), or click on the field and select a date from the calendar.

d. Click on the **Submit** button, and wait while the request is processed.

6. When the report generates (shown below), it displays in an external pop-up window.

Note: *The table on the next page describes the information in the report.*

- To view the details of all eGift cards in a retrieved order, click on order's "Order Number" hyperlink (continue in eGift Order (Card) Details sub-report on page 135).

- To export the report to a file, see Exporting a report to a file (page 142).

This table describes the Enterprise eGift Order Summary report shown on the previous page.[50]

Report header	Description
Order Number	Unique identifier appended to the order.
Order Date	Date (yyyy-mm-dd + hh:mm:ss) on which the purchaser submitted the order.
Cancelled Date	Date (yyyy-mm-dd + h:mm:ss) on which the order was cancelled.
First Card Retrieved Date	Date (yyyy-mm-dd + h:mm:ss) on which an eGift card in the order was first accessed by the recipient.
Total Value Retrieved	Total dollar amount loaded on the eGift cards (in the order) that have been accessed by the recipient(s).
# Cards Retrieved	Total number of eGift cards (in the order) that have been accessed by their recipient(s).
# Cards Ordered	Total number of eGift cards in the order.
Total Order Value	Total dollar amount loaded on all eGift cards in the order.
Buyer Email	Email address of the buyer (purchaser) who submitted the order.
Buyer First Name	First name of the buyer (purchaser) who submitted the order.
Buyer Last Name	Last name of the buyer (purchaser) who submitted the order.

---

[50] Data for promotional cards are not included in this report.

![Moneris logo]

eGift Order (Card) Details sub-report

The eGift Order Details report (shown below) lists the card and delivery details of all the eGift cards in an order. Specific report details are described in the table below.

— To view the eGift card details of an order,   generate an Enterprise eGift Order Summary report, and click on the order's "Order Number" hyperlink (see Enterprise eGift Order Summary report on page 132).
— To export the report to a file, see Exporting a report to a file (page 142).

This table describes the eGift Order Details report shown above. [51]

Report header	Description
Card Number	eGift card number.
Order Date	Date (yyyy-mm-dd hh:mm:ss) on which the buyer (purchaser) submitted the order.
Requested Delivery Date	eGift card delivery date (yyyy-mm-dd) originally scheduled by the buyer (purchaser).
Last Delivery Date	Date (yyyy-mm-dd) of the last occurrence of an attempted eGift card delivery to the recipient.
Date Retrieved	Date (yyyy-mm-dd) on which the eGift card recipient accessed their eGift card.
Retrieved Value	Original dollar amount loaded on the card at the time the recipient first accessed their eGift card.
Card Value	Dollar amount originally loaded on the eGift card upon card activation.
# Times Emailed	Number of times the eGift card notification was sent to the recipient.
Recipient	Recipient email address to which the eGift card notification was sent.
Buyer First Name	First name of the buyer (purchaser) who submitted the order.
Buyer Last Name	Last name of the buyer (purchaser) who submitted the order.

---

[51] Data for promotional cards are not included in this report.

![Moneris logo]

Exception - Buyer and Recipient email Match on eGift Orders report

The steps below describe how to generate a report listing any eGift card order (submitted through your Moneris eGift iFrame) that meets these conditions: 1) The order exceeds the purchase amount threshold that you specify; 2) The buyer (purchaser) email and the recipient email are identical. Report details include order number, retrieval information, payment card, buyer information, and more. You can export the report results to a file. Only orders having the status "Completed" or "Fulfilled" are included in the report (see Order status definitions on page 156). Maximum report date range: 45 days.

Note: Ensure your browser is configured to allow pop-ups from this site (the report displays in a pop-up window).

1. Log into the Client Portal (see Logging into the Client Portal on page 67).

2. When you are logged in, click on **Reports** in the menu bar (shown below).

3. When the "Reports" page displays (shown below), go the "Reports" navigation pane, and click on **< Program name > Reports** to expand the file tree.
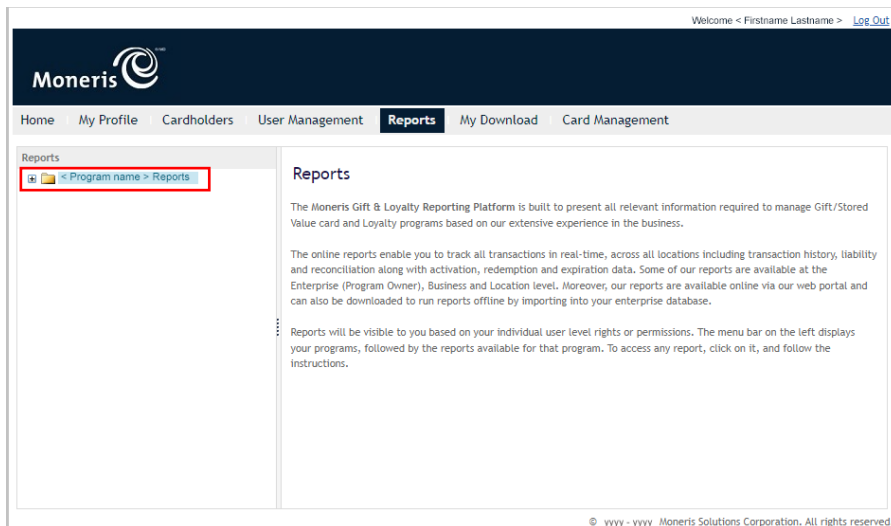
4. In the expanded file tree (shown below), click on **Enterprise > eGift Reports > Exception - Buyer and Recipient email Match on eGift Orders**.
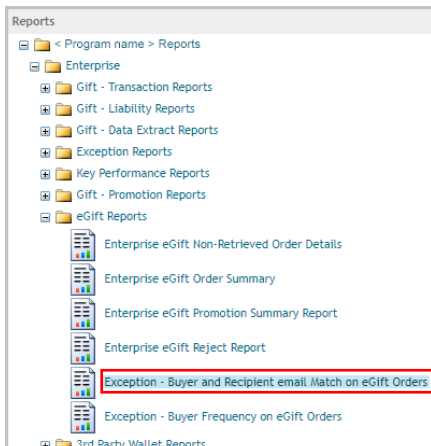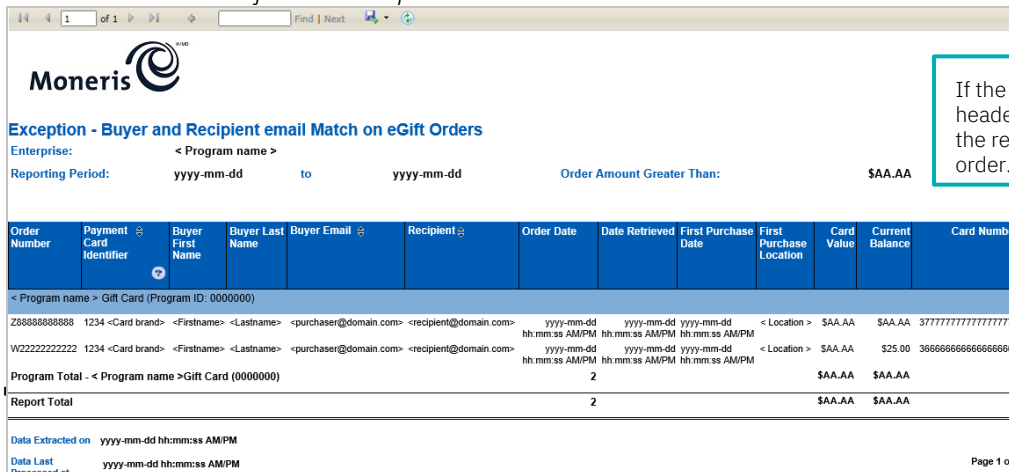
5. When the "Exception - Buyer and Recipient email Match on eGift Orders" page displays (shown below), enter your search criteria:

e. In the **End Date (dd/mm/yyyy)** field, enter the report start date (dd/mm/yyyy), or click on the field and select a date from the calendar.

f. In the **End Date (dd/mm/yyyy)** field, enter the report end date (dd/mm/yyyy), or click on the field and select a date from the calendar.

g. In the **Dollar Amount Greater Than** field, enter the purchase amount threshold that an order must exceed to be included in this report.

h. Click on the **Submit** button, and wait while the request is processed.

6. When the report generates (shown below), it displays in an external pop-up window.
   Note: The table on the next page describes the data listed in the Exception - Buyer and Recipient email Match on eGift Orders report shown below.

If the up/down ⬍ icon displays beside a header, you can click on it to re-sort the report list in ascending/descending order.

This table describes the Exception - Buyer and Recipient email Match on eGift Orders report shown on the previous page.

Report header	Description
Order Number	Unique identifier appended to the order.
Payment Card Identifier	Last four digits and card brand of the debit/credit card used to fund the order.
Buyer First Name	First name of the buyer (purchaser) who submitted the order.
Buyer Last Name	Last name of the buyer (purchaser) who submitted the order.
Buyer Email	Email address of the buyer (purchaser) who submitted the order.
Recipient	Recipient email address to which the eGift card notification was sent.
Order Date	Date and time (yyyy-mm-dd + hh:mm:ss) on which the buyer (purchaser) submitted the order.
Date Retrieved	Date and time (yyyy-mm-dd + hh:mm:ss) on which the eGift card recipient first accessed the eGift card.
First Purchase Date	Date on which the recipient first redeemed dollars from the eGift card.
First Purchase Location	The first location at which the recipient redeemed dollars from the eGift card.
Card Value	Dollar amount originally loaded on the eGift card upon card activation.
Card Balance	The dollar amount currently loaded on the eGift card.
Card Number	eGift card number.

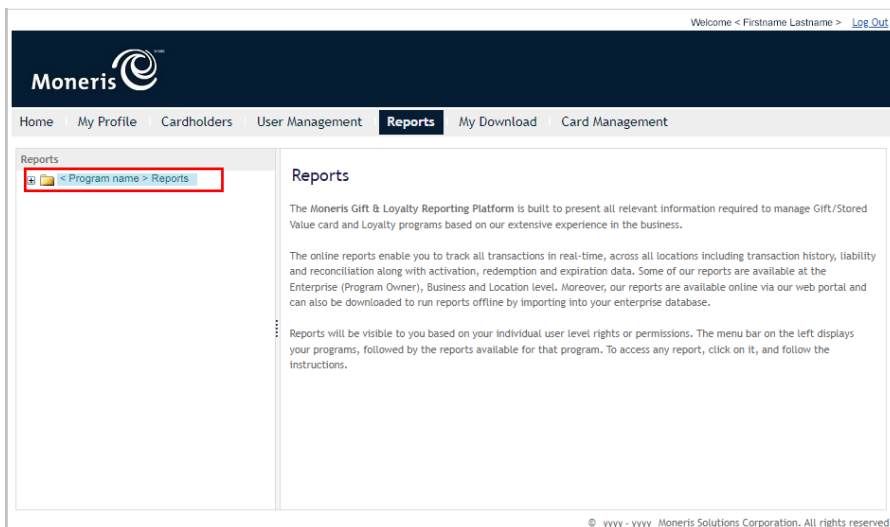# Exception - Buyer Frequency on eGift Orders report

The steps below describe how to generate an eGift card report listing orders (submitted through your Moneris eGift iFrame) that are funded by a debit/credit payment card used to fund other orders at a frequency exceeding that which you specify. Report details include order number, payment card number (last four digits), buyer and recipient information, card activity, and more. Only orders having the status "Completed" or "Fulfilled" are included in the report (see Order status definitions on page 156). You can export the report to a file. Maximum date range: 45 days.

Note: Ensure your browser is configured to allow pop-ups from this site (the report displays in a pop-up window).

1. Log into the Client Portal (see Logging into the Client Portal on page 67).

2. When you are logged in, click on **Reports** in the menu bar (shown below).

3. When the "Reports" page displays (shown below), go the "Reports" navigation pane, and click on **< Program name > Reports** to expand the file tree.

4. In the expanded file tree (shown below), click on **Enterprise > eGift Reports > Exception - Buyer Frequency on eGift Orders**.

5. When the "Exception - Buyer Frequency on eGift Orders" page displays (shown below), enter your search criteria:
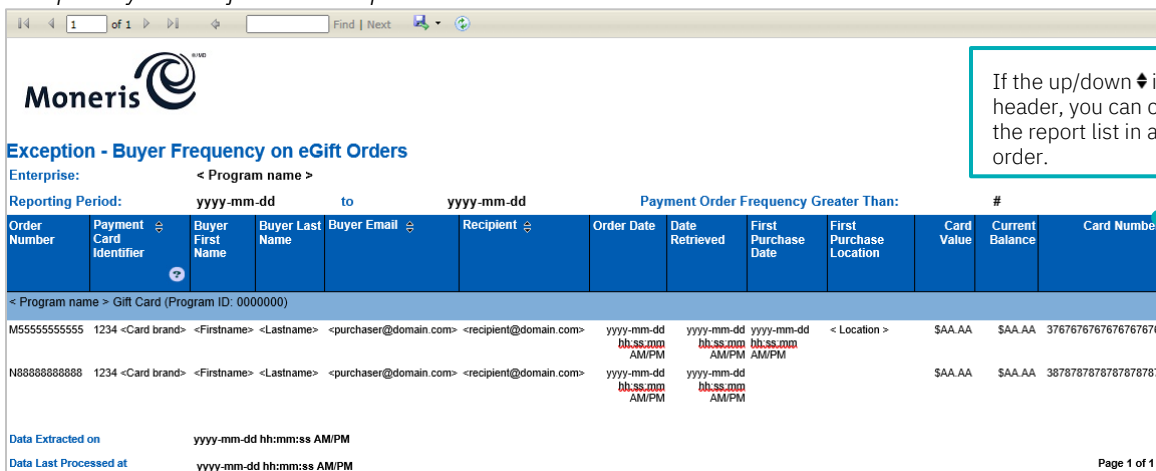
a. In the **End Date (dd/mm/yyyy)** field, enter the report start date (dd/mm/yyyy), or click on the field and select a date from the calendar.

b. In the **End Date (dd/mm/yyyy)** field, enter the report end date (dd/mm/yyyy), or click on the field and select a date from the calendar.

c. In the **Frequency Greater Than** field, enter the payment card frequency threshold that must be exceeded to include an order in the report.

d. Click on the **Submit** button, and wait while the request is processed.

6. When the report generates (shown below), it displays in an external pop-up window.

*Note: The table on the next page describes the information shown in the Exception - Buyer Frequency on eGift Orders report.*

This table describes the Exception - Buyer Frequency on eGift Orders report shown on the previous page.

| Report header	Description
Order Number	Unique identifier appended to the order.
Payment Card Identifier	Last four digits and card brand of the debit/credit card used to fund the order.
Buyer First Name	First name of the buyer (purchaser) who submitted the order.
Buyer Last Name	Last name of the buyer (purchaser) who submitted the order.
Buyer Email	Email address of the buyer (purchaser) who submitted the order.
Recipient	Recipient email address to which the eGift card notification was sent.
Order Date	Date and time (yyyy-mm-dd + hh:mm:ss) on which the buyer (purchaser) submitted the order.
Date Retrieved	Date and time (yyyy-mm-dd + hh:mm:ss) on which the eGift card recipient accessed their eGift card.
First Purchase Date	Date on which the recipient used the eGift card to redeem dollars.
First Purchase Location	Date on which the recipient first redeemed dollars from the eGift card.
Card Value	The dollar amount originally loaded on the eGift card upon card activation.
Card Balance	The dollar amount currently loaded on the eGift card.
Card Number	eGift card number.

![Moneris logo]

Exporting a report to a file

The steps below describe how to export an eGift card Enterprise or Exception report.

1. Generate the desired report (see <u>Enterprise and exception eGift</u> card reports on page 128).

2. When the report is displayed in a pop-up window on your screen, do the following:

   a. Click on the "Export" icon in the menu bar of the pop-up window (shown below).
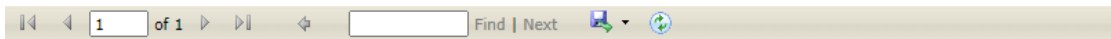
   b. When the "Export" drop-down displays (shown below), click on the desired file type: **CSV (delimited)** (comma separated values), **PDF** (portable document format), or **Excel**.

   Note: To export the report in PDF or Excel format, you must have the appropriate software application installed on your device.
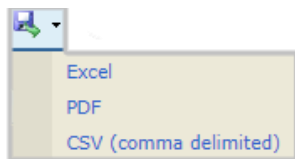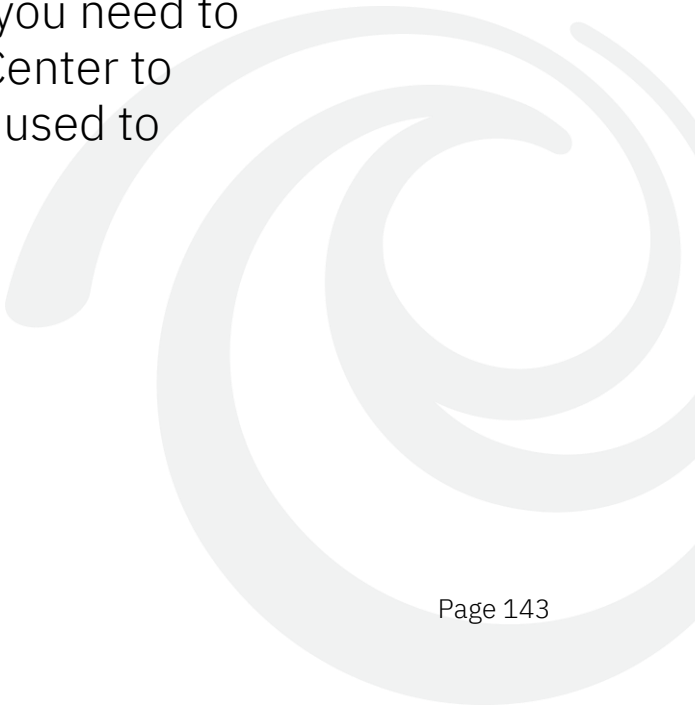

   c. Save the file to a desired location.

Voiding/ refunding a debit/credit transaction.

In this section we go over everything you need to know to use the Merchant Resource Center to void/refund a debit credit transaction used to fund an eGift card order.

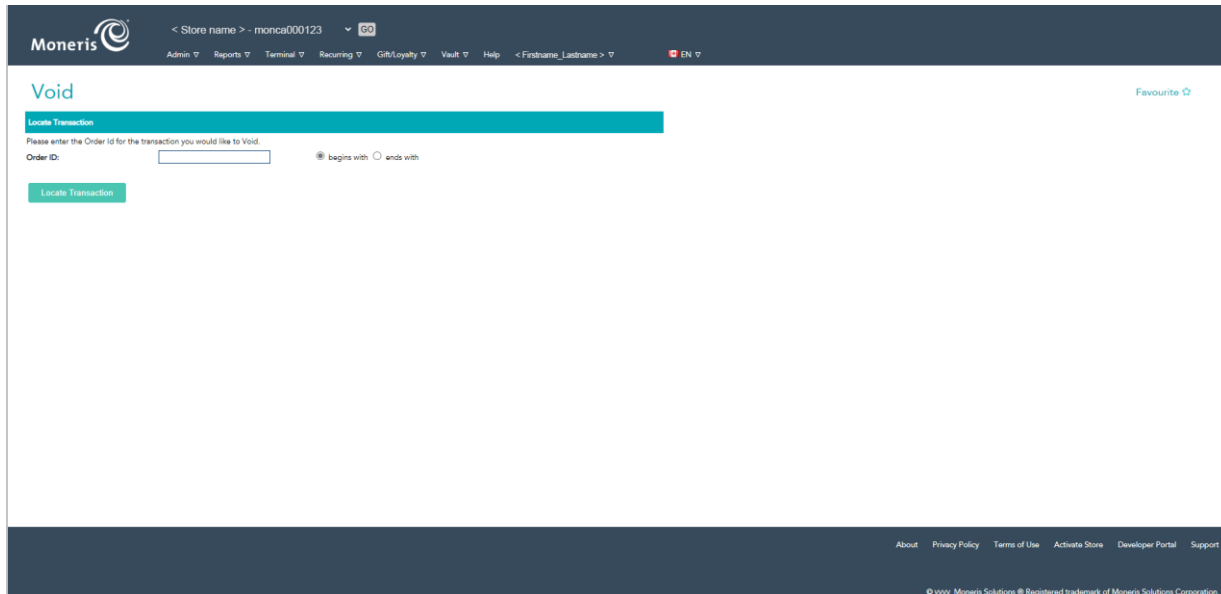# Voiding the debit/credit transaction used to fund an eGift card order

If you cancelled an eGift card order (see Cancelling an entire eGift card order on page 101) that we processed and completed today, follow the steps below to void the debit/credit transaction used to fund the order.

1. Ensure that you have one of the following identifiers from the cancelled order (you will be instructed to enter either identifier in the next few steps).

   ▪ The "Gift Card Order#" from the order's "Order Details" page (see "Order Details" page: cancelled order on page 124).

     OR
   ▪ The "Order Number" from the "Thank you for shopping with us!" notification that we sent to the purchaser upon completing their order (see "Thank you for shopping with us!": order summary notification on page 89, or see "Thank you for shopping with us!": order approved notification on page 88). Contact the purchaser if you need this number.

2. Log into the Merchant Resource Center (see Logging into your Moneris Merchant Resource Center store on page 152).

3. When you are logged in, click on **Terminal** > **Void** in the menu bar (shown below
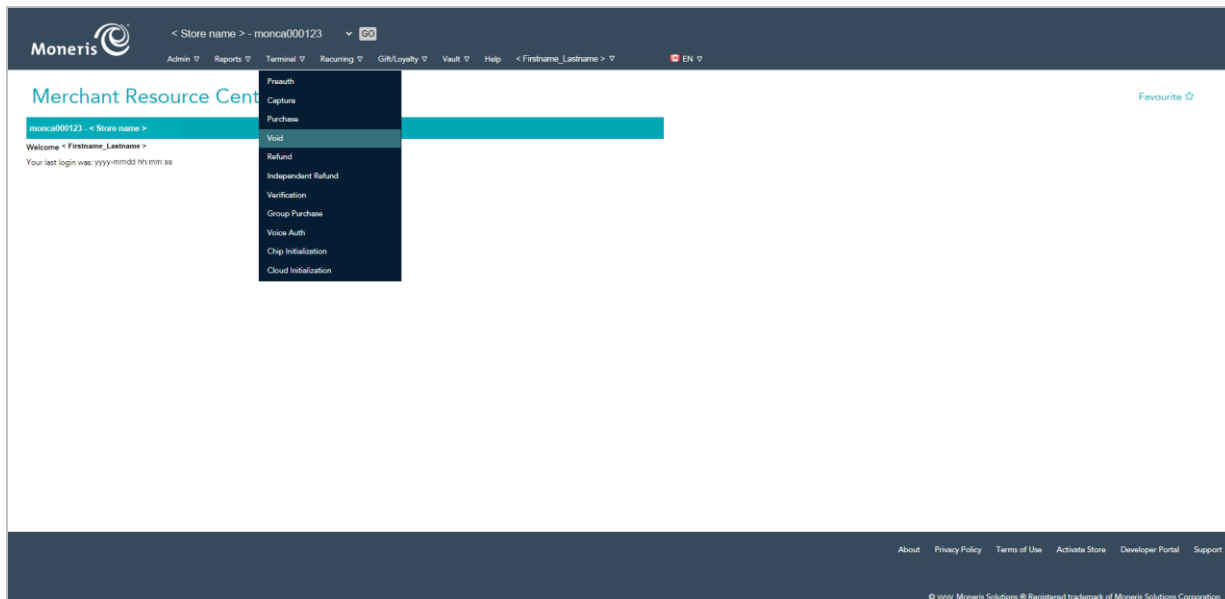
4.

5. When the "Void" page displays (shown below), do the following:
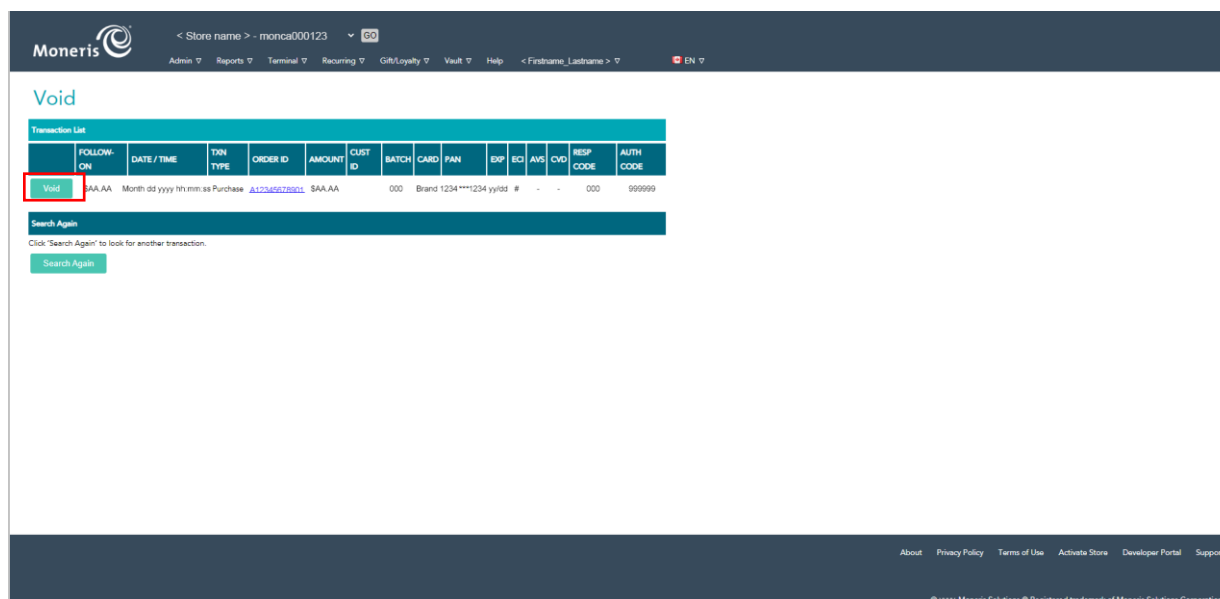

Using the "Gift Card Order#"?

a. In the **Order ID** field, enter the "Gift Card Order#" from the cancelled order's "Order Details" page.

b. Click on the **ends with** radio button.

c. Click on the **Search Transactions** button.

d. Continue at step 6 (next page).

Using the "Order Number"?

a. In the **Order ID** field, enter the "Order Number" from the "Thank you for shopping with us!" notification that we sent to the purchaser.

b. Click on the **begins with** radio button.

c. Click on the **Search Transactions** button.

d. Continue at step 6 (next page).

6. When the Void "Transaction List" displays (shown below), click on the **Void** button.

Note: *If you cannot retrieve the desired transaction,[52] try performing a Refund (see <u>Refunding the debit/credit transaction used to fund an eGift card order</u> on page 148).*

7. When the Void "Transaction Details" display (shown below), do the following:

   a. If the **Customer Code** field displays, optionally enter a customer identifier.

---

[52] You may be unable to retrieve the transaction because it is in a closed batch. If a transaction is in a closed batch, it can only be reversed via a Refund.

b. In the **Invoice Number** field displays, optionally enter an invoice number.

c. Click on the **Process Transaction** button.

d. When the "APPROVED" response displays, the operation is complete.

# Refunding the debit/credit transaction used to fund an eGift card order

If you cancelled an entire order (see Cancelling an entire eGift card order on page 101) or partially cancelled an order (see Partially cancelling an eGift card order on page 103) that we processed on a previous day, follow the steps below to refund the debit/credit transaction used to fund the order. The refund can be for the full or a partial amount.

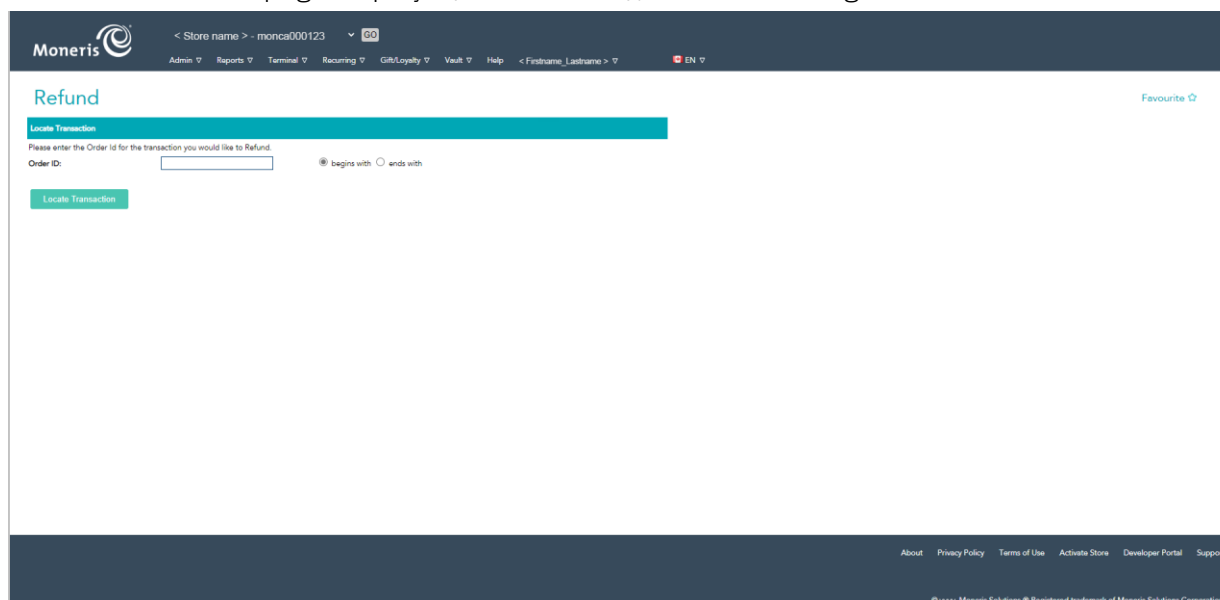*Note:*	*The Refund transaction will appear on the purchaser's cardholder statement.*

1. Ensure that you have one of the following identifiers from the cancelled order (you will be instructed to enter either identifier in the next few steps).

   ▪ The "Gift Card Order#" from the order's "Order Details" page (see "Order Details" page: cancelled order on page 124).

     OR
   ▪ The "Order Number" from the "Thank you for shopping with us!" notification that we sent to the purchaser upon completing their order (see "Thank you for shopping with us!": order summary notification on page 89, or see "Thank you for shopping with us!": order approved notification on page 88). Contact the purchaser if you need this number.

2. Log into the Merchant Resource Center (see Logging into your Moneris Merchant Resource Center store on page 152).

3. When you are logged in, click on **Terminal** > **Refund** in the menu bar (shown below).
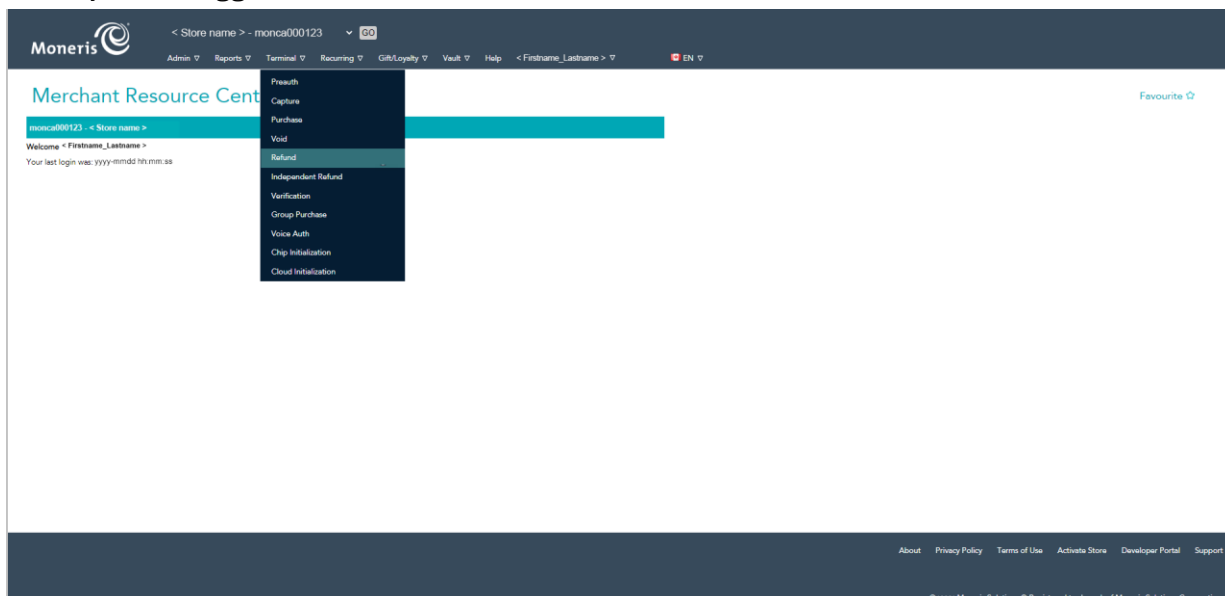
4. When the "Refund" page displays (shown below), do the following:
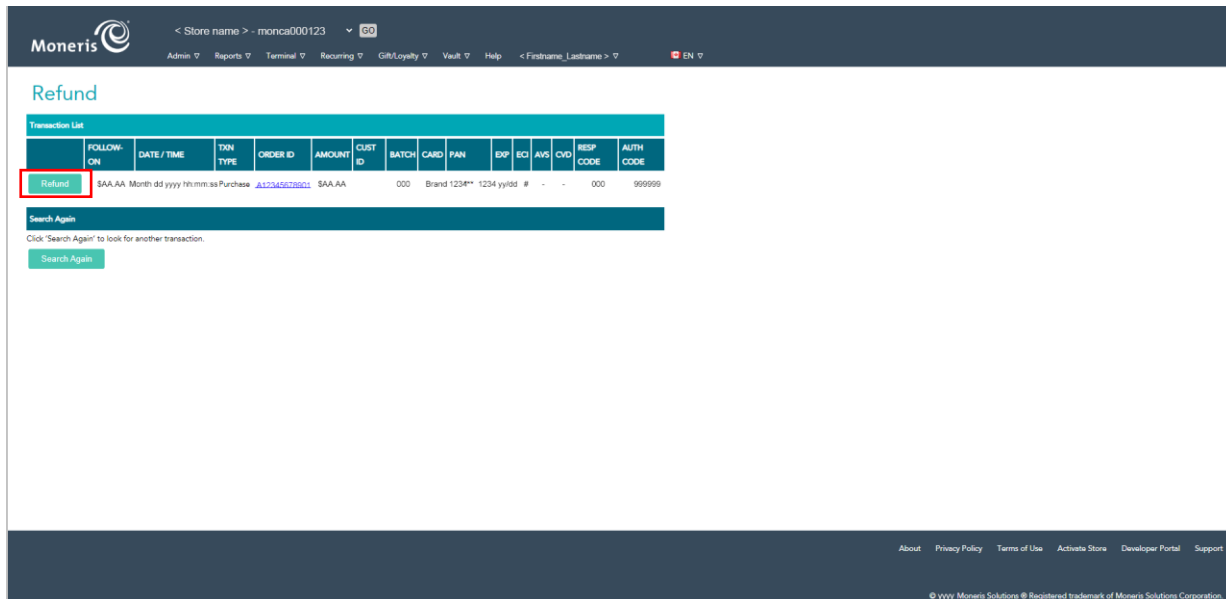

Using the "Gift Card Order#"?

a. In the **Order ID** field, enter the "Gift Card Order#" from the cancelled order's "Order Details" page.

b. Click on the **ends with** radio button.

c. Click on the **Search Transactions** button.

d. Continue at step 5 (next page).

Using the "Order Number"?

a. In the **Order ID** field, enter the "Order Number" from the "Thank you for shopping with us!" notification that we sent to the purchaser.

b. Click on the **begins with** radio button.

c. Click on the **Search Transactions** button.

e. Continue at step 5 (next page).

5. When the Refund "Transaction List" displays (shown below), click on the **Refund** button.

   Note: *If you cannot retrieve the desired transaction,[53] try performing a Void (see Voiding the debit/credit transaction used to fund an eGift card order on page 144).*
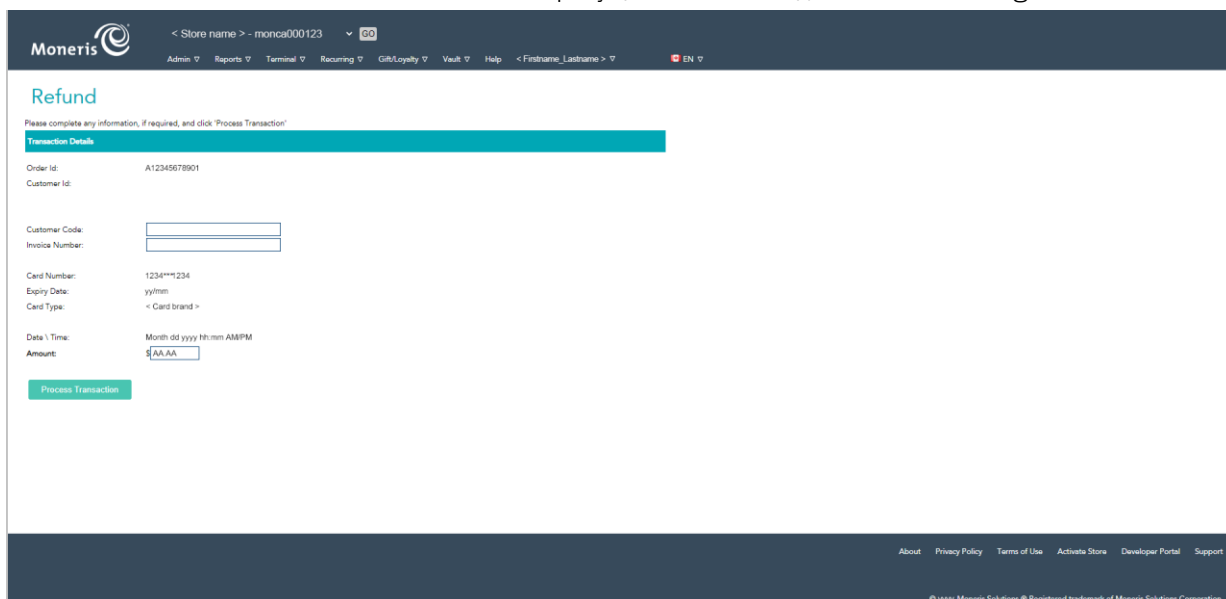

6. When the Refund "Transaction Details" display (shown below), do the following:

   a. If the **Customer Code** field displays, optionally enter a customer identifier.

---

[53] You may be unable to retrieve the transaction because it is in an open batch. If a transaction is in an open batch, it can only be reversed via a Void.
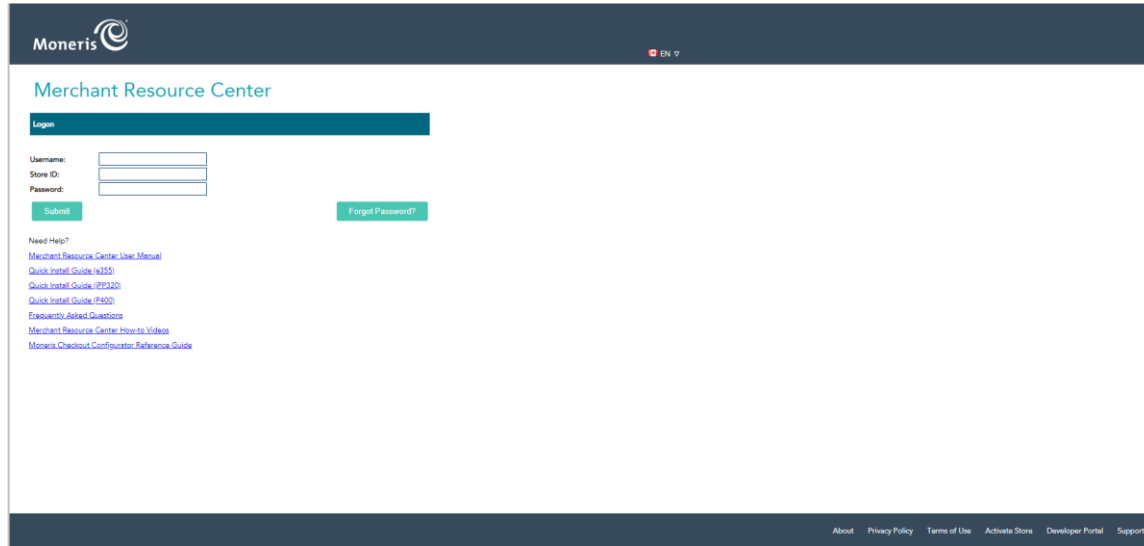
b. In the **Invoice Number** field displays, optionally enter an invoice number.

c. If you want to change the displayed Refund amount, enter the new dollar amount in the **Amount** field.

d. Click on the **Process Transaction** button.

e. When the "APPROVED" response displays, the operation is complete.

Logging into your Moneris Merchant Resource Center store

The steps below describe how to log into your Moneris Merchant Resource Center (Gateway) store.

1. Visit https://www3.moneris.com/mpg to start on the "Merchant Resource Center" login page (shown below).
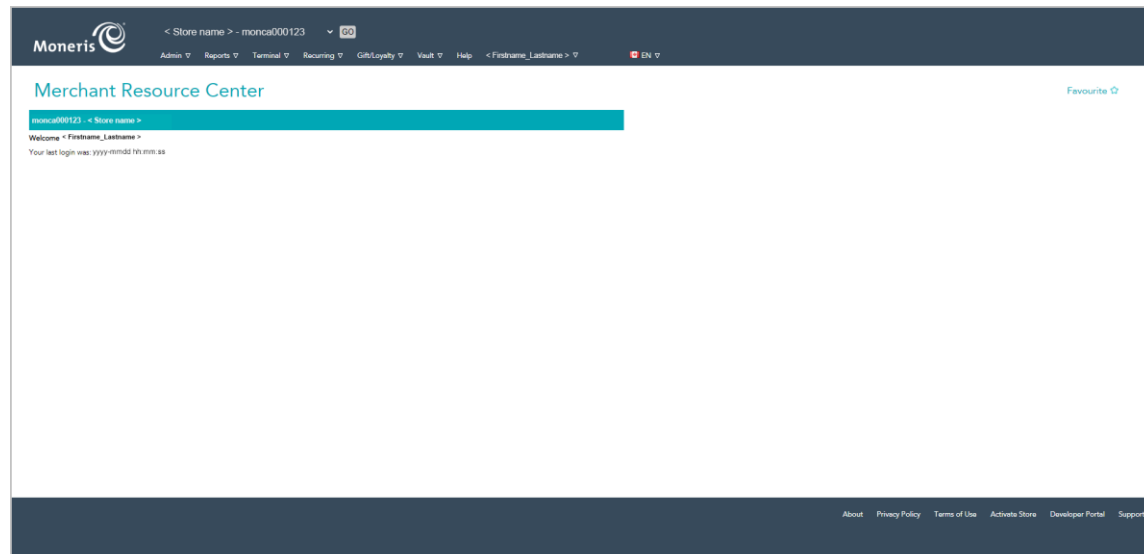
2. Enter your Merchant Resource Center (Gateway) credentials in the "Logon" fields:

   Note: *Please refer to your*

   a.   In the **Username** field, enter your username.

   b.   In the **Store ID** field, enter your store ID.

   c.   In the **Password** field, enter your password.

   d.   Click on the **Submit** button.

3. When the homepage displays (shown below), it means you are logged in.

Frequently asked questions.

In this section we answer frequently asked questions about the Moneris eGift iFrame.

Frequently asked questions

Resending an order summary/receipt notification

Question	Answer
Need to resend an order summary notification?	1. See <u>Resending a "Thank you for shopping with us!" notification</u> (page 110).
Need to change the language of an order receipt?	See answer to <u>Need to resend an order summary notification?</u> above.
Need to change the delivery address of an order receipt?	See answer to <u>Need to resend an order summary notification?</u> above.

Resending an eGift card/notification

Question	Answer
Need to resend an eGift card/notification?	**Non-promotional eGift card:** 1. See <u>Resending a "Recipient, you've received a $AA eGift Card!" notification</u> (page 111). **Promotional eGift card:** 1. See <u>Resending a "Thank you for your purchase" notification</u> (page 113).
Need to change the delivery date of an eGift card/notification?	See answer to <u>Need to resend an eGift card/notification?</u> above.
Need to change the delivery method (email or SMS text) of an eGift card/notification?	See answer to <u>Need to resend an eGift card/notification?</u> above.
Need to change the language of an eGift card/notification?	See answer to <u>Need to resend an eGift card/notification?</u> above.
Need to change the delivery address of an eGift card/notification?	See answer to <u>Need to resend an eGift card/notification?</u> above.

Cancelling an order

| Question	Answer
Need to cancel an eGift card order?	**Entire order:** See <u>Cancelling an entire eGift card order</u> (page 101). **Partial order:** See <u>Partially cancelling an eGift card order</u> (page 103).

Appendix.

Order status definitions

Status	Description
Cancelled	The order was successfully processed to completion (see description for "Processed" listed below), but the entire order was subsequently cancelled by an administrative user. When the order was cancelled, all eGift cards in the order were auto-deactivated. *Note: The "Cancelled" status is logged on the "Order Details" page (see "Order Details" page: cancelled order (page 124) and in Enterprise and exception eGift card reports (page 128).*
Completed	At least one non-promotional eGift card in a processed order (see description for "Processed" listed below) has not been accessed by the intended recipient. *Note: The "Completed" status is logged only in Enterprise and exception eGift card reports (see page 128).*
Declined	A system error occurred resulting in the order being discontinued. *Note: The "Declined" status is logged only on the "Order Details" page (see "Order Details" page: declined order on page 122).*
Fulfilled	All non-promotional eGift cards in a processed order (see description for "Processed" listed below) have been accessed by the recipient(s). *Note: The "Fulfilled" status is logged only in Enterprise and exception eGift card reports (see page 128).*
Processed	The order was manually approved or auto-approved, resulting in the successful creation and delivery of the eGift card(s) to the intended recipient(s) per the specifications in the order. If a promotion was active at the time the order was processed and the purchase amount qualified, one or more promotional cards may have been issued to the customer (purchaser) who placed the order. *Note: The "Processed" status is logged only on the "Order Details" page (see "Order Details" page: processed order on page 116).*
Queued	The order is currently held in the queue awaiting review so that it can be approved or rejected. *Note: This "Queued" status is logged only on the "Order Details" page (see "Order Details" page: queued order 114).*
Rejected	The queued order was manually rejected by an administrative user, resulting in the order being discontinued. *Note: The "Rejected" status is logged only on the rejected order's "Order Details" page (see "Order Details" page: rejected order page 120).*

eGift card status definitions

Status	Description
Active	The eGift card has been created, loaded with funds, and emailed/texted to a recipient via a notification hyperlink per the specifications of a processed and completed order. (See also the descriptions for "Downloaded" and "Processed" listed below.) *Note:* The "Active" status is logged only in the "Lookup Cardholders" report (see *Partially cancelling an eGift card order* on page 103).
Downloaded	The recipient accessed the eGift card via the notification hyperlink that was emailed/texted to them per the specifications of a processed and completed order. (See also the description for "Processed" listed below.) *Note:* The "Downloaded" status is logged only on the "card details" bar of the "Order Details" page (see *Card details: processed order* on page 118).
Cancelled	The eGift card is permanently deactivated and cannot be used to perform any gift transactions. *Note:* The "Cancelled" status is logged on the "card details" bar of the "Order Details" page (see *"Order Details" page: cancelled order* on page 124).
Deactivated	The eGift card is permanently deactivated and cannot be used to perform any gift transactions. *Note:* The "Deactivated" status is logged only in the Lookup Cardholder report (see *Partially cancelling an eGift card order* on page 103).
Processed	The recipient has not yet accessed the eGift card via a notification hyperlink that was emailed/texted to them per the specifications of a processed and completed order. (See also the description for "Downloaded" listed above.) *Note:* This status type is logged only on the "card details" bar of the "Order Details" page (see *Card details: processed order* on page 118).

Merchant support.
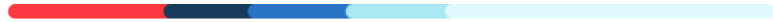
At Moneris, help is always here for you 24/7.

Moneris

If you need assistance with your payment processing solution, we're here to help, 24/7.

We're only one click away.

- Visit https://www.moneris.com/en/support/products/gift-card-program to:
    - *download additional copies of this guide*
    - *access other Moneris Gift Card resources*
- Visit shop.moneris.com to purchase point-of-sale supplies and receipt paper
- For business and payment news, trends, customer success stories, and quarterly reports & insights, log into Moneris Insights at https://login.moneris.com/en/login

Need us on-site? We'll be there.

One call and a knowledgeable technician can be on the way. Count on minimal disruptions to your business as our Field Services provide assistance with your payment terminals.

Can't find what you are looking for?

Call Moneris Customer Care (available 24/7) toll-free at **1-866-319-7450**. We'll be happy to help. You can also send us a secure message 24/7 by logging into Merchant Direct® at https://login.moneris.com/en/login.

Need help?

Web: https://www.moneris.com/en/support/products/gift-card-program

Toll-free: 1-866-319-7450

Record your Moneris merchant ID here:

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