



Set-up Guide for Organizers

How to succeed with your new
Community eGift Card.

Welcome!

The Yiftee team is excited to embark on this journey with you.

Ever since we launched the company back in 2012, we have been all about bringing profitable business to local shops and restaurants. We started by doing simple eGift Cards for small businesses. Along our journey we developed easy ways to promote them, and for companies and individuals to buy lots of them. Then it all came together when we started doing Community Cards in late 2017.

It turns out with small businesses, when you combine them and go digital, you attract new buyers that bring new revenue to the community. Everyone wants to shop local – but it needs to be easy and the shopper needs to make the choices. The Community Card, with “something for everyone” allows just that.

Now we have more than 265 Community Cards and 10,000 merchants. *The key to success is our partnership with you.* We can do tech, security and payments, but YOU know your community. We’re here to back you 100% so let us know what you need, and we’ll share what we’ve got and together, let’s keep local dollars local.

Welcome to Yiftee! We’re thrilled to work with you.

*Donna Novitsky, CEO
Yiftee, Inc.*

10 Simple Steps

Let's begin to set-up your
Community eGift Card!



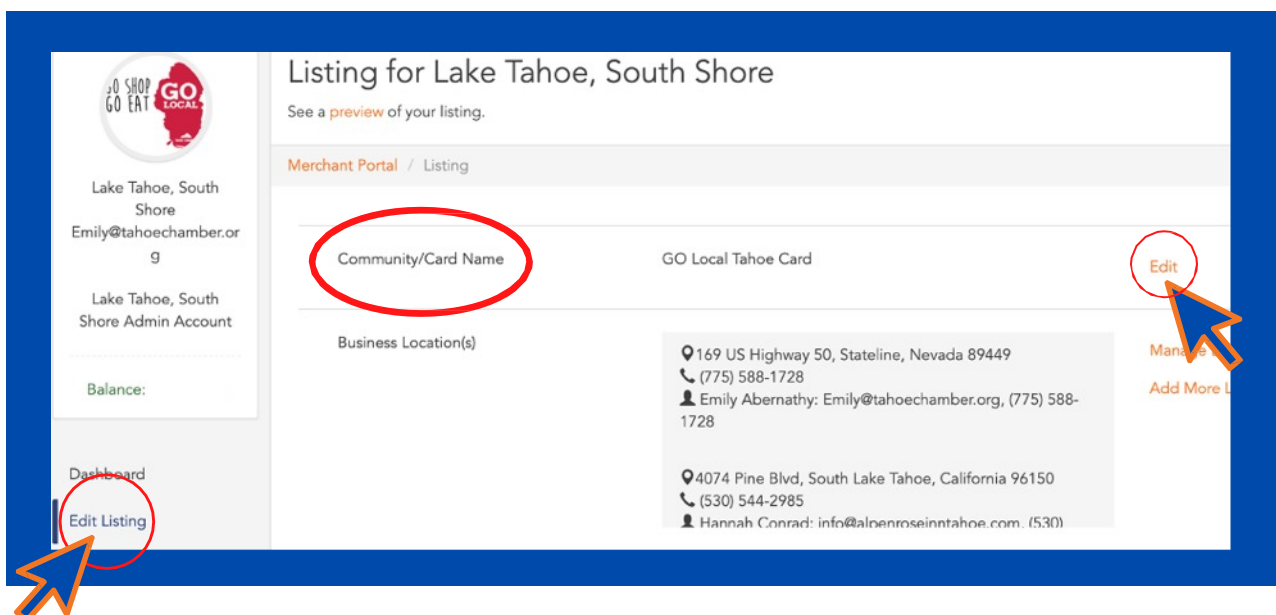
1

Name Your Card

Pick a name that's catchy and unique to your community!



You can edit your gift card name in the “Edit Listing” section of your portal.



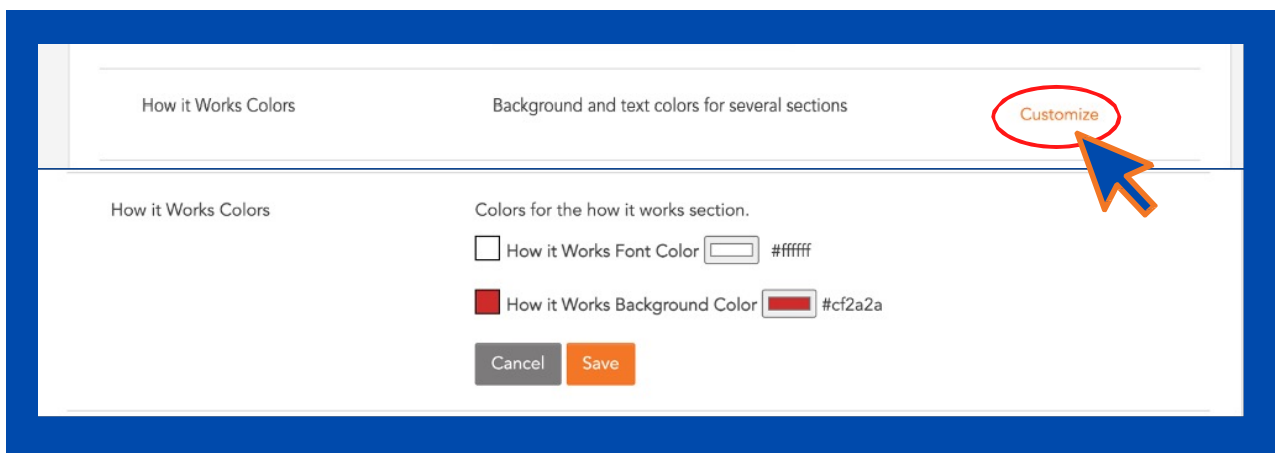
2

Customize Your Page

In that same “Edit Listing” tab, upload all of your images and customize your redemption card.

These are the image sizes you will need:

- Card image, 300x200 pixels, horizontal layout
 - Background image, 1170x500 pixels, horizontal layout
 - Your logo, 500x500 pixels
 - Your “How It Works” and redemption card image, 160x100 pixels
- Your background image will automatically have a filter on it that will darken it. Make sure to pick an image that is bright and represents your community.
 - Make sure to select a color for your “How it Works” section by clicking “Customize” at the bottom of Edit Listing. This will make your page pop!



Need some ideas?

Here are some examples of eGift Pages we love:

<https://app.yiftee.com/gift-card/lake-tahoe--south-shore>

<https://app.yiftee.com/gift-card/downtown-dollars-nashville>

<https://app.yiftee.com/gift-card/shop-cool-spring-fayetteville>

<https://app.yiftee.com/gift-card/times-square>

<https://app.yiftee.com/gift-card/charlotte-qc-cash>

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Invite Your Merchants To Participate

Fill out the "Merchant Spreadsheet" in your Community Card Organizer Welcome Package. Treat it like a wish list of all the businesses you would like to have participating in your program. The more the better!

Then, upload your spreadsheet in the "Manage Locations" tab in your account by clicking on "Upload CSV."

A location is a merchant in the Portal. This is the recommended process because it avoids data entry for everyone. However, it's also possible for merchants to self-sign-up on the eGift page. If you do not want the eGift page to be self-sign-up, please let us know.

Manage Locations

[Add A Location](#) [Upload CSV](#) [Location Report](#) [Send All Activation Cards](#)

See a [preview](#) of your listing.

[Merchant Portal](#) / [Listing](#) / [Manage Locations](#)

Search table for...

Store Name	Address	City	State	Business Number	Status
Lake Tahoe, South Shore	169 US Highway 50	Stateline	Nevada	(775) 588-1728	Need to Run Activation Card
Alpenrose Inn	4074 Pine Blvd	South Lake Tahoe	California	(530) 544-2985	Need to Run Activation Card
Artemis Lakefront Cafe	900 Ski Run Blvd	South Lake Tahoe	California	(530) 542-3332	Live
Azul - Latin Kitchen	1001 Heavenly Village Way	South Lake Tahoe	California	(530) 541-2985	Live
Bare Roots Coffee	2572 Lake Tahoe Blvd, Unit 3	South Lake Tahoe	California	(530) 600-4422	Live

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Reach Out To Your Local Businesses

Depending on your time and resources, you may choose to do this via email, over the phone, by going door-to-door or all of the above.

You'll find an intro message for businesses in the "Email Outreach Templates" document as well as a "Merchant Overview" document that you can use to announce and explain the program.

Merchant Training is essential to a successful gift card program. Make sure your businesses know how to redeem the gift cards and train their staff correctly. Encourage them to post the "How to Redeem" one-pager where employees can see it. They must let you know if they update their PoS or change cc processors, as they will need to run a new Activation Card.

Make sure to customize, print and send out the window clings provided in your Welcome Package email so your participating businesses can advertise your gift card in their store-fronts.



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Send Out Activation Cards

Once you've made the initial contact with your local businesses, you can click on "Send All Activation Cards" in the Manage Locations tab in your account.

The screenshot shows the 'Manage Locations' dashboard. At the top right, there are buttons for 'Add A Location', 'Upload CSV', 'Location Report', and 'Send All Activation Cards'. The 'Send All Activation Cards' button is circled in red, and a blue arrow points to it. In the left sidebar, the 'Manage Locations' option is circled in red, and a blue arrow points to it. Below the buttons, there is a search bar and a table of merchant listings.

Store Name	Address	City	State	Business Number	Status
Lake Tahoe, South Shore	169 US Highway 50	Stateline	Nevada	(775) 588-1728	Need to Run Activation Card
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Yiftee will send all the businesses in your account their unique Activation Card. For the first two weeks, businesses will also get reminders every few days to run their Activation Cards.

The screenshot shows a Yiftee Activation Card. At the top, it says 'Merchant Name' and 'Print this page'. Below that, a message states: 'Your activation hasn't been completed -- Process the activation card in your POS and check the status by refreshing this page'. The main body of the card features the Yiftee logo, 'AUTHORIZED FOR UP TO \$0.10', and the card number '5199 7530 4918 1294'. Below the card number, it shows the expiration date '06/21', the CVV '345', and the ZIP code '94025'. At the bottom, it says 'Voucher Redemption by MasterCard'. To the right of the card, there is a section titled 'What am I signing up for?' which explains that Yiftee is an e-gift card solution powered by the MasterCard network, with no gift card stocking or tracking, no new equipment, and no discounted pricing.

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Send Out Activation Cards (Continued)

If you would like to print the Activation Cards or individually send them out, click on the “Need To Run Activation Card” link for the specific business.

Power user tip! Print out the “Location Report”, which lists the Activation Card link for each business.

Manage Locations [Add A Location](#) [Upload CSV](#) [Location Report](#) [Send All Activation Cards](#)

See a [preview](#) of your listing.

Merchant Portal / Listing / Manage Locations

Search table for...

Store Name	Address	City	State	Business Number	Status
Lake Tahoe, South Shore	169 US Highway 50	Stateline	Nevada	(775) 588-1728	Need to Run Activation Card
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When a business runs their Activation Card, they will appear as “Live” on your site and you will see them in your portal’s map. It might take up to 24 hours.

Where Can I Use the Gift Card?

Filter By Category

Map Satellite

See Printable List

- 1 A Cup of Cherries
3434 Lake Tahoe Blvd
South Lake Tahoe, California 96150
(530) 454-5111
acupofcherries.com
- 2 Alpina Coffee
622 Emerald Bay Rd
South Lake Tahoe, California 96150
(530) 541-7449
y2qjw.com/alpinacoffee/cafe/
- 3 Artemis Lakefront Cafe
900 Ski Run Blvd
South Lake Tahoe, California 96150
(530) 542-3332
artemislakefrontcafe.com
- 4 Azul - Latin Kitchen
1001 Heavenly Village Way
South Lake Tahoe, California 96150
(530) 541-2985
- 5 Bare Roots Coffee
2572 Lake Tahoe Blvd, Unit 3
South Lake Tahoe, California 96150

5

Send Out Activation Cards (Continued)

The best way to get all the Activation Card links is to run the “Location Report”, which gives you a spreadsheet of all the merchant data and their unique Activation links in one place.

The screenshot shows the 'Manage Locations' dashboard. At the top right, there are four buttons: 'Add A Location', 'Upload CSV', 'Location Report', and 'Send All Activation Cards'. The 'Location Report' button is circled in red, and a blue mouse cursor is pointing to it. Below the buttons, there is a search bar and a table of merchant data. The table has columns for Store Name, Address, City, State, Business Number, and Status. The first two rows have a status of 'Need to Run Activation Card', while the others are 'Live'.

Store Name	Address	City	State	Business Number	Status
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Please Note:

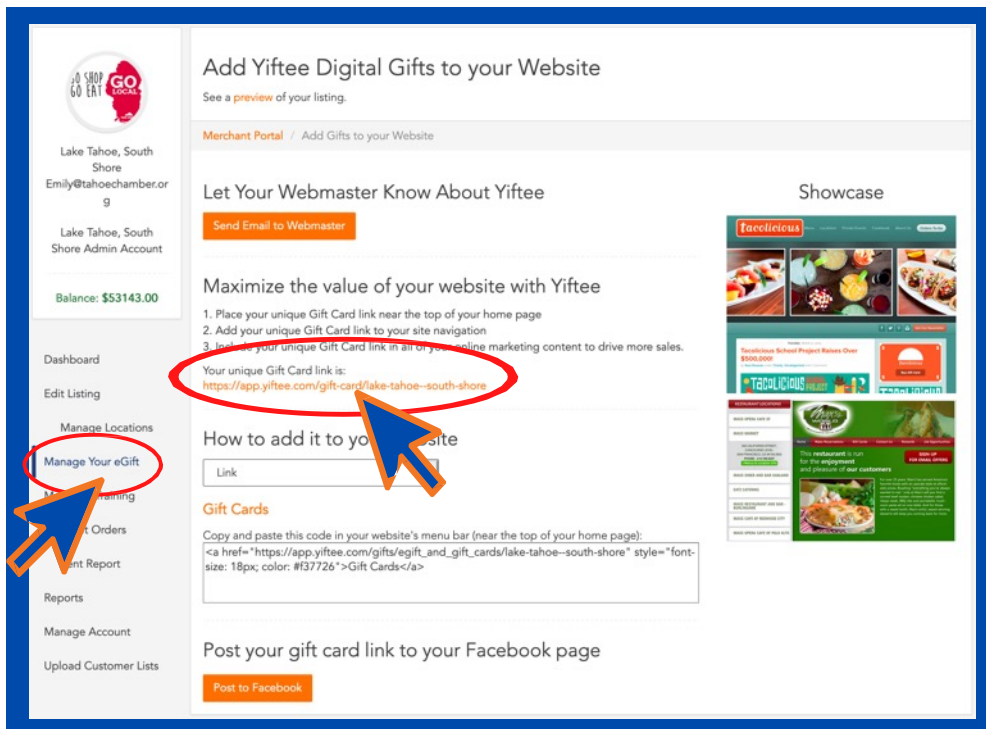
- Activation cards may take up to 24 hours to process before the business is live on our site.
- If a business’s PoS requires a minimum transaction of \$1 or more, they should run the Activation Card for the minimum. It will get declined, but we still get the information we need to add them.
- Businesses with BOTH store front and online shops must run different activation cards through both PoS systems.
- Businesses with multiple PoS systems must run a different activation card through EACH system.
- If a participating business changes their PoS system or Credit Card processor, they must run a new Activation Card.
- To generate a new Activation Card, find the business under “Manage Locations,” scroll all the way to the right (past “Status”) and click the grey arrow. Then, select “Resend Activation Card.” Do this multiple times for multiple Activation Cards.

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Share Your URL

Add a “Buy Our Gift Card” button with the link to your gift card on your website.

Go to the “Manage Your eGift” tab in your portal and copy your unique Gift Card link.



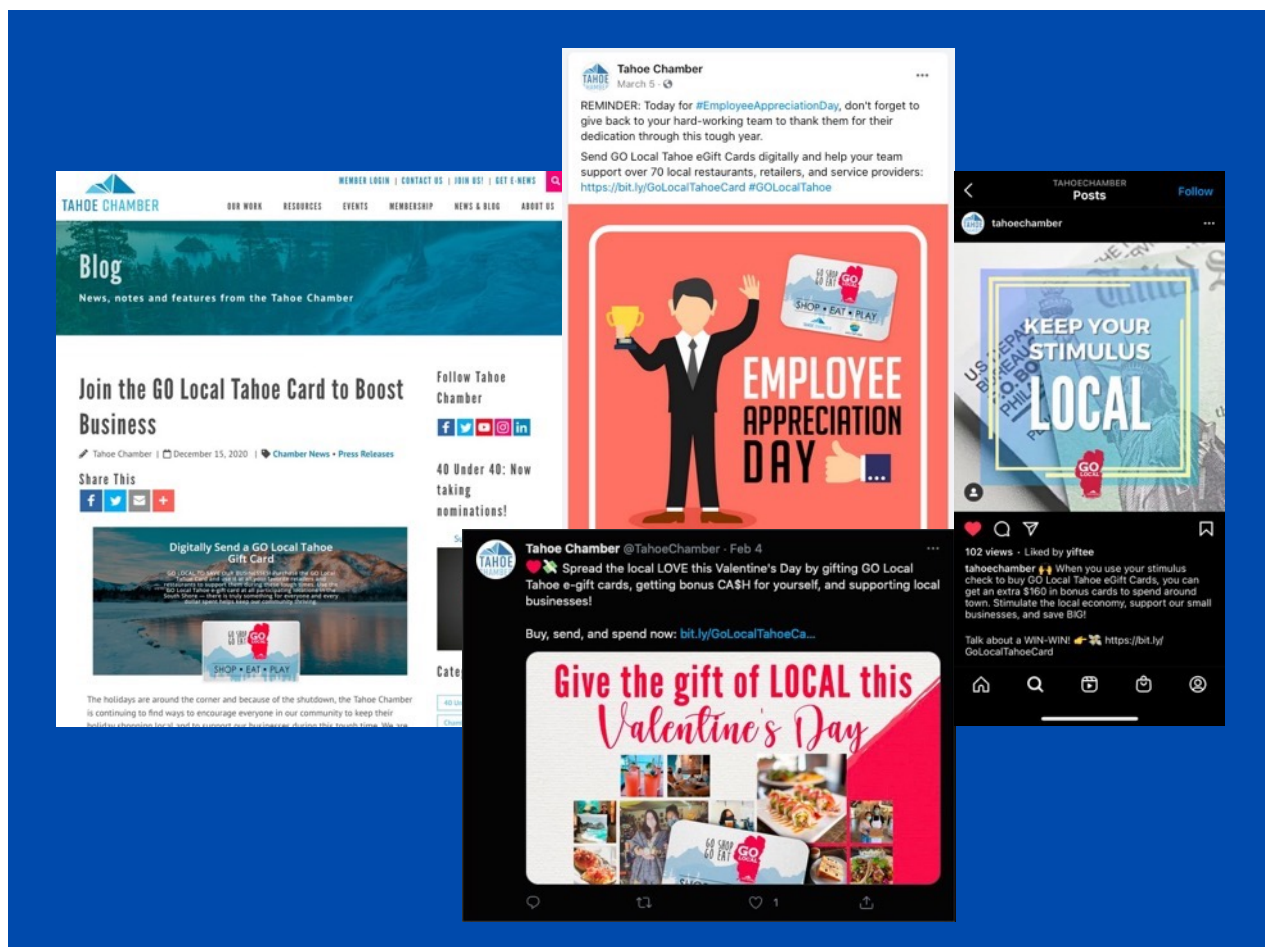
Have merchants put it on their websites. Make it easy for consumers to find and buy gifts!



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Share Your URL (Continued)

Once you launch the program, share the URL on social media and in newsletters and encourage your participating merchants to do the same.



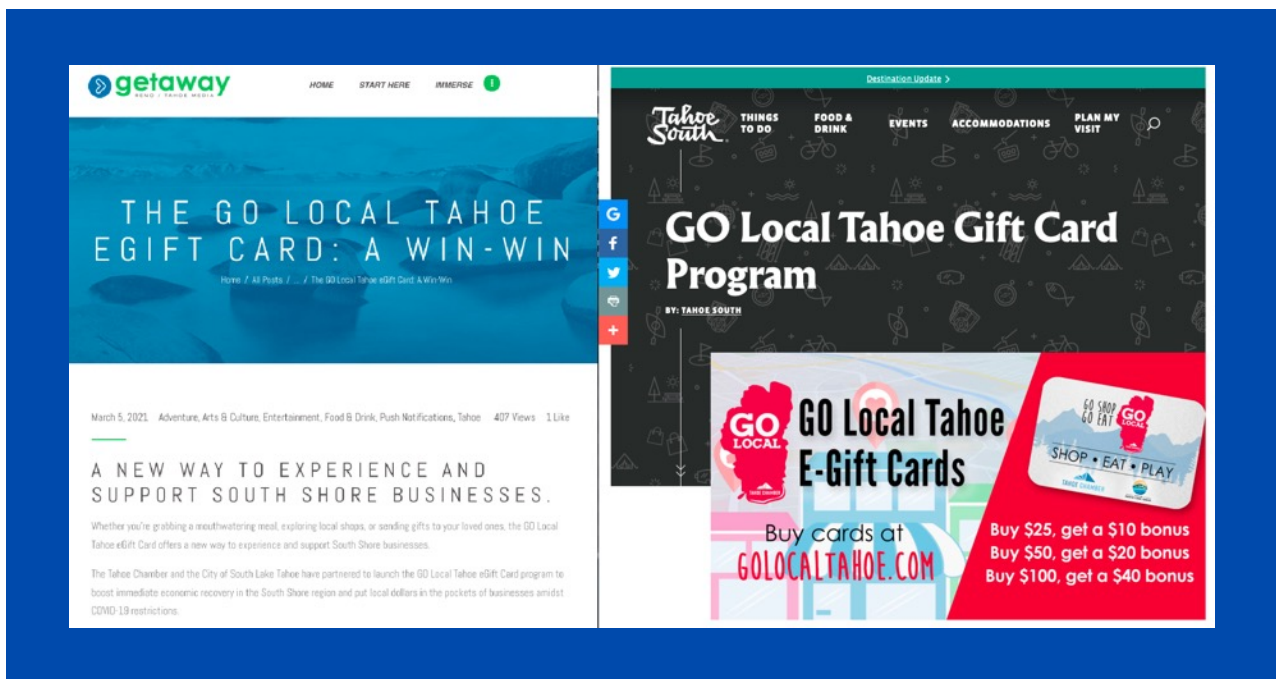
You'll find customizable social media posts and other free resources in the **Yiftee Support Center**:
<https://yiftee.zendesk.com/hc/en-us>

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Plan Your Launch

Set a deadline to get merchants to run their Activation Cards and kick off the program.

This can be as simple as getting a local publication to run a press release for you.



You will find the “Press Release Template” in your Community Card Organizer Welcome Package.

You can also access it the **Yiftee Support Center**:
<https://yiftee.zendesk.com/hc/en-us>

Sell Cards: Recruit Corporate Card Buyers and Sponsors

Having a local employer with 50 or more employees that is willing to support your community (e.g. city governments, local banks, schools, hospitals, corporations, law firms, insurance companies, realtors) can really help your Community Card program grow.

- Private sponsors can also fund a BOGO or matching gift card promotion for your program.
- We'd be happy to customize our corporate sales pitch for your community and set up meetings to pitch your gift card program to local employers. Please let us know if you would like to set up a time to talk about recruiting corporate buyers.
- Discounted eDelivery fees are available for bulk purchases and we can easily set up accounts for ongoing employee rewards or customer appreciation programs.



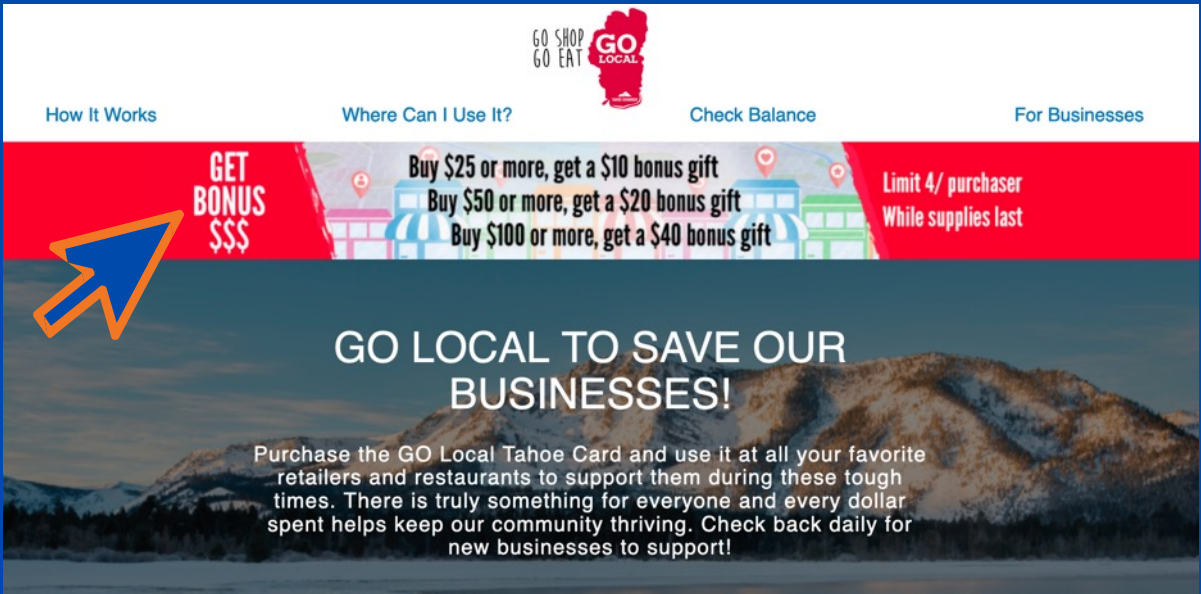
You will also find a message for corporate buyers in the “Email Templates” document in your Welcome Package.

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Sell Cards: Create a Bonus Card Promotion (Optional)

Create a **BOGO** promotion to promote gift card sales and get more dollars directly to local merchants!

- Sponsors can match gifts or help subsidize your promotion.
- Bonus Promotions run as long as you want and you can set an expiration date for bonus gifts to encourage rapid gift card redemption.
- If gift cards are not redeemed by the expiration date, funds go back to your account, less a 10% restocking fee to Yiftee. No money is lost!
- Contact sales@yiftee.com for more information or to set one up.



The screenshot displays the GO Local website interface. At the top, there are navigation links: "How It Works", "Where Can I Use It?", "Check Balance", and "For Businesses". The main promotional banner features the "GO SHOP GO EAT GO LOCAL" logo and a red background with white text. The promotion details are: "GET BONUS \$\$\$", "Buy \$25 or more, get a \$10 bonus gift", "Buy \$50 or more, get a \$20 bonus gift", and "Buy \$100 or more, get a \$40 bonus gift". A red box on the right states "Limit 4/ purchaser While supplies last". Below the banner, a blue mouse cursor points to the "GET BONUS \$\$\$" text. The main heading reads "GO LOCAL TO SAVE OUR BUSINESSES!". The background of the lower section shows a scenic view of snow-capped mountains. At the bottom, a paragraph explains: "Purchase the GO Local Tahoe Card and use it at all your favorite retailers and restaurants to support them during these tough times. There is truly something for everyone and every dollar spent helps keep our community thriving. Check back daily for new businesses to support!"

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Sell Cards: Special Offers (Optional)

Increase card value and attract the “self-use” buyer with Special Offers!

Featured Merchants and Special Offers with your Gift Card

Offers can change at any time. Offers are only valid while they are active.

[See Printable List](#)

 <p>EUGENE BACKYARD FARMER 501 Washington Ave Eugene, Oregon 97401 ONE FREE SEED GARLIC BULB. Details</p>	 <p>EQUIANO COFFEE 300 Blaire Blvd Eugene, Oregon 97402 FREE SHOT OF ESPRESSO! Details</p>	 <p>HEADS UP! 5% OFF YOUR FIRST PURCHASE LANE COUNTY BOUNTY UNIQUE EUGENE checkout code: LOVELOCAL LANE COUNTY BOUNTY 735 Walnut St Eugene, Oregon 97404 5% OFF OF YOUR PURCHASE! Details</p>	 <p>EUGENE TOY & HOBBY 32 East 11th Avenue Eugene, Oregon 97401 RECEIVE 10% OFF YOUR PURCHASE! Details</p>
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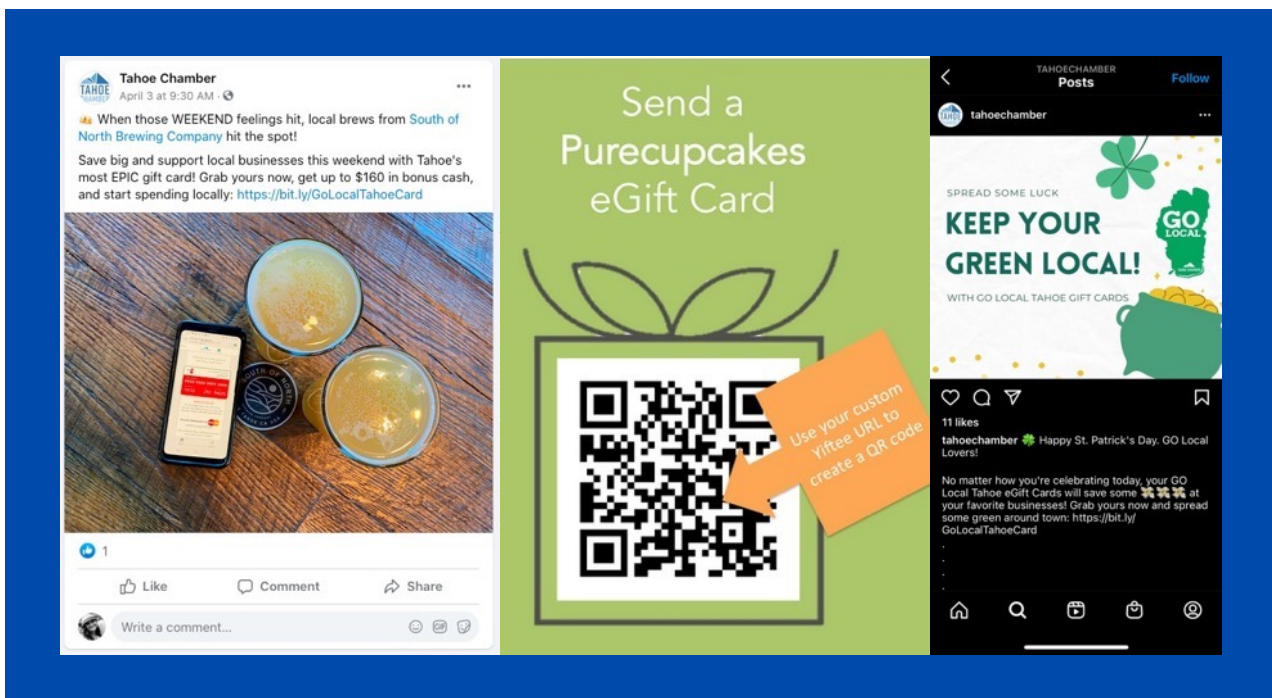
- Perhaps for a phase 2 of your rollout, add Featured Merchants and Special offers to your Community Card program. These are special incentives offered by your merchants to draw card users into their stores. They can be anything, as you see here – but make it fun and you’ll sell more cards to people for their own self-use.
- Set Offers up in “**Manage Locations**” drop down menu on the far right. You have to set it up for the merchants – they do not have system access. There are no special coupons and it’s up to the merchants to tell their staff to honor them in their stores when customers show them on their mobile devices along with the gift cards.

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Ongoing Marketing

Marketing your gift card throughout the year will help you sell more cards.

Find the “Marketing Resources” tab at the top of you portal, beside “eGift Cards”, or click [HERE!](#)



Menu stuffers with QR codes, social media posts, press releases and special events and give-aways are also great ways to continuously promote your program.

Detailed instructions on How to Edit Social Media Templates and How to Create a QR code:

<https://yiftee.zendesk.com/hc/en-us/articles/360047771611-How-to-Customize-a-Yiftee-Provided-Social-Media-Flyer>

Customer Support

Refer customers and merchants with questions about cards or redemption to support@yiftee.com and we will be happy to address their issues promptly.



For more support and to connect with other Yiftee communities across the country, request to join the **Facebook leaders group:**
<https://www.facebook.com/groups/847400012355454>

