

D O L L A R S O N T H E N E T[®]

A Supplemental Guide to **DOLLARS ON THE NET[®]** User Reference



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Dollars
on the net[®]



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With the IT'S YOUR CARD Site Builder, you can create your own custom gift card site to specifications set by you or by the users you select. Just simply pick your template, upload your company logo, select a profile image, and pick your colors and other style elements. You can preview your site beforehand, and just one click will make your site live.

How To Build Your Own Gift Card Site with IT'S YOUR CARD ®

Account Administrator Tasks

Note: There are two options for creating an IYC site:

- Create a Site Administrator that is separate from the Account Administrator. This option allows the Site Administrator to create the gift card site while the Account Administrator controls the account level settings.
- The Account Administrator creates the gift card site directly. For this option, you can skip the first section below and begin with **Configure IT'S YOUR CARD ® settings**.

Create a Site Administrator

1. Log in to your DOLLARS ON THE NET account as the Account Administrator.
2. Select **Home > Administration Home**.
3. From the **User Maintenance** screen, select the **Create a New User** account tab.
4. Fill in the user account settings. (More detailed instructions for creating a new user can be found on the DOLLARS ON THE NET User Reference Guide > Adding and Editing Users.)
5. Under **It's Your Card** and **User Type**, select **Site Admin**. (For Site Admin, User Permissions are ignored.)
6. Click **Create User**.

Configure i4Go Settings

1. Login to i4Go by visiting <https://secure.i4go.com/>.
2. If you are not already registered use the **Click here to register** link and follow the instructions.
3. When configuring i4Go you must enable the **Allow URL Override** option for both the **Success URL** and the **Failure URL**.
4. Detailed instructions for the remaining i4Go settings can be found in the i4Go documentation located here: http://www.shift4.com/PDF/i4Go_API.pdf.
5. Once you have completed your i4Go site configuration notate the entry point created by i4Go for your site as it will be needed to configure the next section.

Configure IT'S YOUR CARD ® Settings

1. Under **Account > It's Your Card > Settings**, verify general settings.
2. Select the **Custom IYC Sites** tab and configure custom settings.
3. Click **Apply**.



Change or Verify Packages and Shipping Options

(Detailed instructions can be found on the DOLLARS ON THE NET User Reference Guide > User Accounts > Administrator Menus and Functions > Administrator's Account Menu > It's Your Card Menu.)

Change or Verify Order Fulfillment

(Detailed instructions can be found on the DOLLARS ON THE NET User Reference Guide > It's Your Card: Additional Information > Internet Order Fulfillment.)

Site Administrator Tasks

Create the Gift Card Site

1. Log in as the Account Administrator or Site Administrator. (This will take you to the IYC Site Builder screen.)
2. In the IYC Site Builder Screen, select a template to view. A preview will appear on the right.
3. Once you have chosen a template, click **Select Template**, and you will be taken back to the template screen.
4. To add your company logo: In the template screen, click on the company name image. A box will appear to upload your image.
5. Find and select your company logo by clicking **Browse**. (Shift4 is not responsible for unauthorized images; make sure your logo is authorized before clicking the box that allows upload.)
6. Click **Upload**.
7. To add a company profile image: Click on the default picture in the template. A box will appear offering more default images or you may upload your own.
 - a. Default images: Click an image title from the scroll box to see a preview above it. Click **Use Selected Image**.
 - b. User-selected profile image: Click **Browse**. (Shift4 is not responsible for unauthorized images; make sure your image is authorized before clicking the box allowing upload.)
8. Click **Upload**.
9. To change the introduction or purchase page text, click on them to make the desired changes.
10. To change advanced style elements of the screen, select the **Style (Advanced)** tab.
11. Click **Preview Changes** to view changes in a new window.



12. Once you have finished making changes, click **Save Your Changes**.
13. Once you have saved your changes, click **View Website**. (This will not make the site live.)
14. Record the URL Web address. (This is the link you will need on your Web site to direct customers where to get gift cards.)
15. When you are ready to make your site live, you will need the Account Administrator to log in and enable the site. (See below for details.)

Enable the Site

1. Log in to your DOLLARS ON THE NET account as the Account Administrator.
2. Under **Account > It's Your Card > Settings**, select the **Custom IYC Sites** tab.
3. Select **Yes** for Enable IYC Site. (This option allows you to enable or disable your site. If this field is set to **Yes**, the site will be accessible to everyone. If it is set to **No**, a message will be displayed saying it is disabled.)

In the spring of this year, Shift4 also released a number of changes to DOLLARS ON THE NET. These are as follows:

Site-Wide Changes

- **Multi-Page Navigation Enhancements** - The page numbers in the View Transactions, Periodic Billing, Customer Maintenance, and User Maintenance have been standardized. The page navigation now uses a standardized pagination format to allow for easier, cleaner, and consistent navigation.
- **Message Box Style Change** - The alert notifications for login failures have been changed to be more readable. The lockouts now have a white background with a bold red border and text.

Using DOLLARS ON THE NET

- **Card Groupings in View Transactions Pages** - An option has been added for the use of card groupings on View Transactions pages that allows customization of subtotals by card types and groups.
- **Sort Options for Transaction Date & Time** - To assist in organizing transactions, we have added a few new ways to sort in the View Options page.
- **Void Draft Receipt** - This type of receipt provides users the ability to track voids for their business, similar to the current sales draft and credit draft.
- **Merchant Type Change Logic When Using Online Entry** - Allows users to change the merchant at the time of transaction without losing credit card information.



- **Referral Code Requirement When Using Online Entry** - To ensure compliant transactions, an authorization code is now required upon receiving referral responses. A draft does not print until the referral code is entered.

Setting Up Access for DOLLARS ON THE NET Users

- **User Name Search in the User Maintenance Option** - A search filter with automatic wildcard searching was added (i.e., "John" will search for all user names with "John" contained in any part of the name). This will assist our accounts that have a large numbers of users because they will no longer have to wait for all of the users to load.
- **IP Address Restriction Validation Check Added** - If DOLLARS ON THE NET detects that new changes being made to the IP Address Restrictions will block access to the person making the change, a confirmation will be displayed prior to accepting the new changes. This feature will help prevent the customer from locking themselves out of the system.
- **Fraud Sentry Velocity Check Test** - This new functionality allows users to test changes that are made to the Velocity Check within Fraud Sentry.
- **Transaction Grid Permission Option** - Customers can now block specific users from accessing the Transaction Grid.

DOLLARS ON THE NET Centralized Account Users

- **Managing Users for Centralized Account Numbers** - Customers are now able to manage the users for their subaccounts from the Centralized Account User Maintenance page.

DOLLARS ON THE NET Periodic Billing Users

- **Customer Name Search to the Customer Maintenance Option** - A search filter with automatic wildcard searching was added (i.e., "John" will search for all user names with "John" contained in any part of the name). This will assist our accounts that have a large numbers of customers being billed because they will no longer have to wait for all of the customers to load.

IT'S YOUR CARD® (IYC) Users

- **Filter Zero Balances** - A user option has been added as a Filter Zero Balances checkbox to the IYC Activation reports.
- **Clerk ID Added to Order Fulfillment** - This feature has been added to pass the user's clerk ID (if assigned) when fulfilling orders in IYC.