

# Gift Card User Instructions



for Diamond 4

These instructions are part of your Help manual. You can access the help manual at anytime by clicking Help in the menu bar of POS•IM.

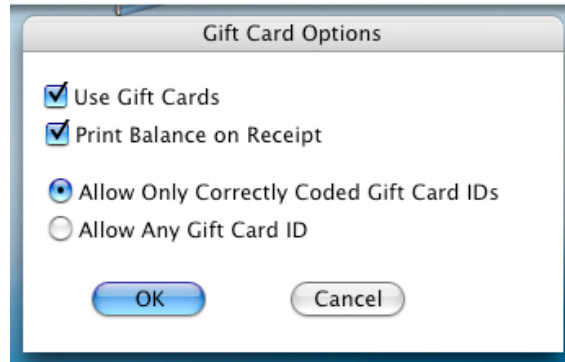
## ***Gift Cards***

Many retailers have gift cards available for purchase. POS•IM Diamond has a system that allows you track each gift card that is issued and its balance. This feature allows you to safeguard against un-issued and redeemed cards, and employee error. Following is an explanation of the procedures to use when selling and redeeming gift cards.

If you have more than one location and want to sell cards at one location and redeem them at another then you will need GCLink. GCLink is an optional module available to give multiple stores access to a central gift card database.

## **Setting POS•IM to Accept Gift Cards**

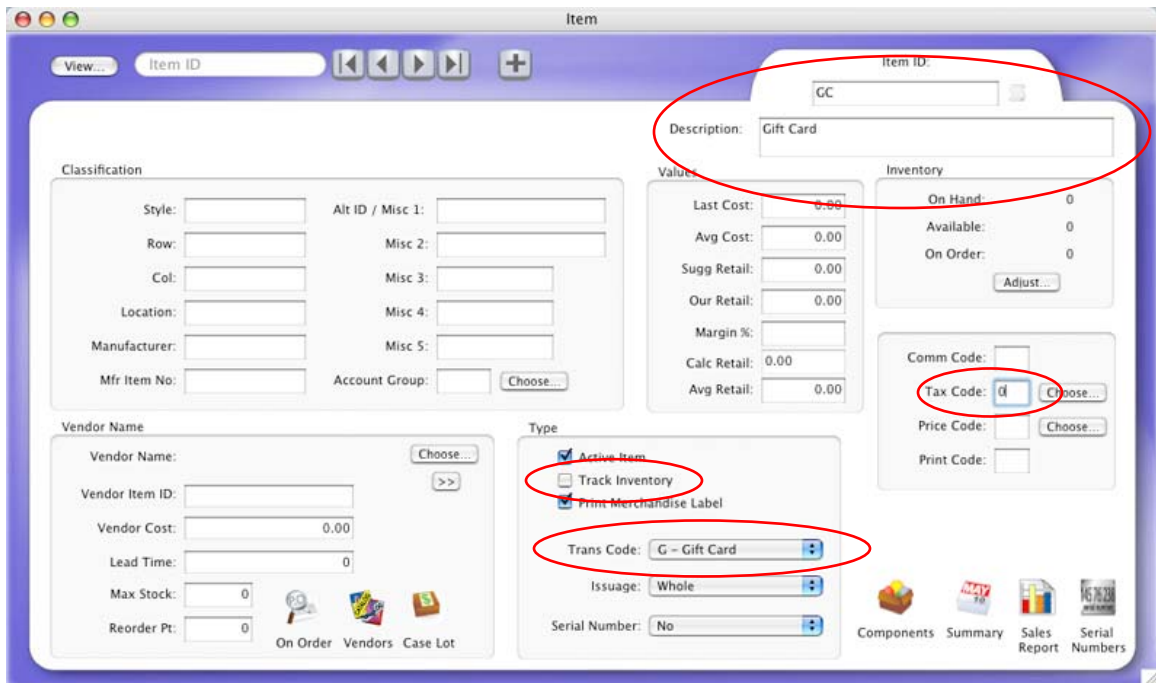
1. Open Sales, then select File>>Preferences>>Invoice>>Gift Card Options.



2. Check the box to accept Gift Cards.
  - a. You can choose to accept cards encoded with your store's serial number or cards with any serial number. Cards encoded with your serial number can be printed by Ensign Systems. This is a great security feature to verify card numbers are correct. Call 800-409-7678 to order cards from Ensign Systems.
  - b. You can choose to print balances on receipts by checking the box.

## **Setting Up an Item Card for Gift Cards**

1. Open Inventory, then select Lists >>Items.
2. Create a new Item Card to use when selling Gift Cards by clicking the "+" button.



- Assign the Item Card an Item ID that indicates it is for gift cards. For example, GC is an easy ID code that clerks will be able to remember.
- Enter a Description that further indicates the Item Card is for gift cards. We suggest “Gift Card” to make future searches easier.
- Select a Trans Code of G for Gift Certificate on the Item Card.
- Select Track Inventory “no”.
- Select No Tax from the Tax Code field on the Item Card.

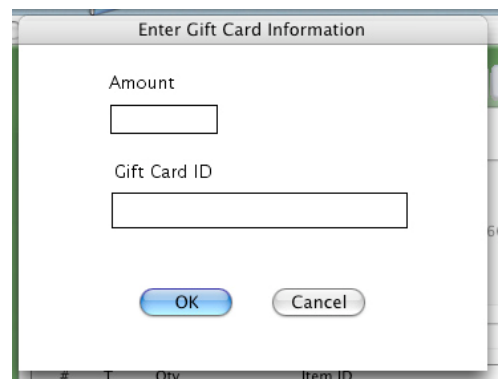
### Obtaining Gift Cards

The POS•IM gift card feature utilizes a special numbering system to prevent fraudulent gift cards from being used. In order for this numbering system to be in place, you must purchase your gift cards from Ensign Systems. They will create gift cards with ID numbers encoded with your store’s serial number, then when a card is sold POS•IM will verify it is a valid ID number for your store. To purchase these cards, contact their sales department at 1-800-409-7678.

**NOTE:** Gift Cards are store specific so they must be used in the location they were purchased.

### Selling Gift Cards

- Open Sales, then select Transaction >>Open Invoice.
- Enter the customer information for the customer purchasing the card.
- In the Item ID field enter the Item ID you created for the gift card. (GC)



- a. A prompt will appear asking you for the gift card amount and gift card ID. Place your cursor in the amount field and type in the dollar amount the customer wants to place on the card.

- b. Tab into the Gift Card ID field. Either swipe the magnetic stripe through your card swipe, scan the barcode with your scanner, or type in the card ID.

4. Post the Open Invoice as normal.

### Redeeming Gift Cards

1. Open Sales, then select Transaction >>Open Invoice.
2. Enter the customer information.
3. Enter the information for the items being purchased.
4. Click the Pay button.
5. At the Type of Payment screen click on the Gift Card button.

- a. You will be prompted to enter the Gift Card serial number. Scan, swipe, or type in the card number.

Gift Card ID	Available	Applying
12345678901234567890	40.00	26.02

Total Applied 26.02  
 Total Gift Card 26.02  
 Amount Remaining 0.00

- b. A screen will show the original balance of the card, the amount being used, and the remaining balance. Click OK.
- c. If the customer owes a balance higher than that of the balance on the gift card, choose the type of payment they will be using to pay the overage and enter the amount they give you.

6. Click the Post button.

### Checking the Card Balance

A report can easily be generated to view the balances of Gift Cards. The report is found in Sales under Reports. Simply scan or swipe an individual card, or enter a group of cards to view the balances. For individual cards you will need to scan or swipe the card twice to fill in the from and to fields of the report query.

Enter Gift Card Report Options

From Card ID

To Card ID

From Date Opened

To Date Opened

From Balance

To Balance

Detail

The report will also give a summary (just the current balance), or detail (a history of transactions) for the card if you check or uncheck the Transaction Detail box.

Gift Card Report

As of 7/7/2005

From Card ID: 12345678901234567890  
To Card ID: 12345678901234567890

From date Opened: First  
To date Opened: Last

From balance: 0.00  
To balance: Last

Detail Included

Gift Card ID	Item ID	Orig. Amt	Balance	Date Active	Last Used
12345678901234567890	gc	40.00	13.98	7/7/2005	7/7/2005

Invoice ID	Date	Amount
Original Amt		40.00
S0000052	7/7/2005	-26.02
Balance		13.98
Total of all gift card balances:		13.98