

# Gift Card User Instructions



for Windows

These instructions are also a part of your User's Guide. If you need more information about any of the new enhancements, or instructions for any other POS•IM tasks, you can find the guide using the following steps:

1. Open your "My Computer" folder
2. Double click on the computer hard drive (generally drive C:)
3. Open the Posim folder
4. Open the Documentation folder

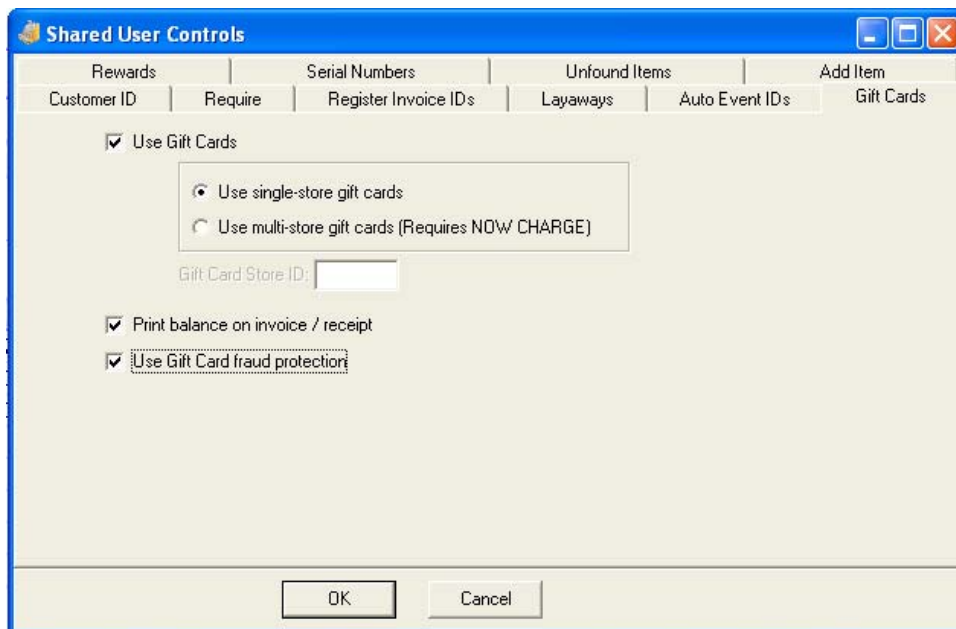
## ***Gift Cards***

POSIM•Premier™ now allows you to sell gift cards to customers that can be redeemed later at your store. Gift cards can be created in specified dollar increments or the dollar amount can be determined at the time the purchase is made.

If you have multiple locations and want to be able to sell at one location and redeem at another, then you will need the help of GCLink. GCLink is an optional module that allows you to process cards at more than one location.

## **Gift Card User Control**

The Gift Card user control must be activated in order to use the gift card feature. It is found by opening Sales•Point, selecting File, then Shared User Controls, then clicking the Gift Card tab. Place a checkmark in the Use Gift Cards box to activate the gift card feature. Place a check in the Print balance on invoice/receipt box to have the balance left on a gift card printed on the receipt of a purchase made using the gift card. The Use Gift Card fraud protection check box should be checked if you are using gift cards printed by Ensign Systems.



## Creating Item Cards for Gift Cards

You must create an Item Card corresponding to the gift card you want to make available. You can create one gift card that can be used for any amount or you can create several gift cards that are assigned specific dollar amounts.

1. Open Inventory•Analyzer, select Window, then Item. Create a new Item Card.

2. Enter an Item ID that will be easy to remember and use at the cash register. Generally GC or Gift Card are a good choice. Also enter a Description that will display on the receipt and serve as a reminder for you what the item is.
3. If you want the gift card to be for a specified amount, enter that amount in the Our Retail field. If you want the clerk to be able to sell gift cards for any amount, leave the price at zero.
4. Change the Tax Code to 0.
5. Change Track Inventory to No.
6. Change the Trans Code to G for Gift Card.
7. Enter any other information you would like to track pertaining to gift cards.

## Obtaining Gift Cards

The 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. To purchase these cards, contact their sales department at 1-800-409-7678.

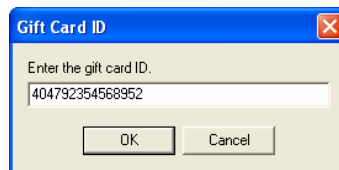
## NOTE

Gift card numbers are store specific, so a gift card must be redeemed in the store from which it was purchased.

## Selling Gift Cards

Gift cards are sold on Working Invoices just like any other item.

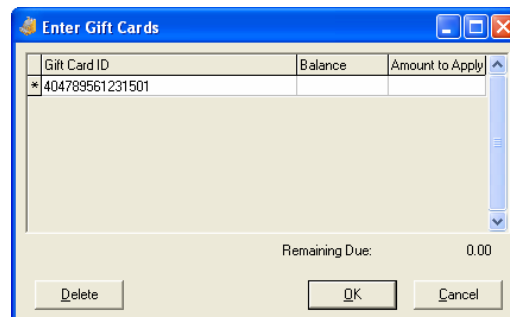
1. Open Sales•Point, select Window, then Working Invoice
2. Enter the customer and item information. When a gift card is entered, a Gift Card ID screen is shown. After entering the Gift Card ID, a gift card amount screen is shown if the gift card item card's price is zero.



3. Enter the gift card ID by swiping the gift card in a mag stripe reader or by scanning the barcode with a scanner.
4. Complete the sale as normal by posting the Working Invoice and give the customer the gift card.

## Redeeming Gift Cards

1. When a customer with a gift card comes in to make a purchase, create a Working Invoice as normally done.
2. Press F8 (the shortcut for Gift Card tender types), or click the Pay button and choose Gift Card. The Enter Gift Cards screen is shown.



3. Enter the Gift Card ID using a mag stripe reader or barcode scanner. The Balance will automatically be shown.

- The maximum amount possible will be applied to the purchase. If you would like to adjust the amount being used you can change the amount to apply. More than one gift card can be entered and applied to a Working Invoice.
- Click OK when finished.
- The amount applied will be shown in the Gift Card field of the Type of Payment screen. Enter any remaining payment and Post the Working Invoice as normal.

## Gift Card Report

The Gift Card Report can be sorted by Gift Card ID, Card Balance, and Date Opened. It lets you view the activities on all the cards that fit the selected criteria.

- To find the Gift Card Report, open Sales•Point, select Reports, then Gift Card Report.

- Entered the desired Gift Card ID, Date Opened, and Card Balance ranges.
- Determine whether or not you want the Transaction Detail included.
- Click OK.

**Gift Card Report**  
As of 10/13/2005

From Card ID	From Date Activated	From Balance	<input checked="" type="checkbox"/> Transaction Detail Included			
To Card ID	To Date Activated	To Balance				
Gift Card ID	Item ID	Balance	Orig Amount	Date Activated	Date Last Used	Activated Inv ID
123	G25	33.39	25.00	10/13/2005	10/13/2005	P00049
	<i>Invoice ID</i>	<i>Date</i>	<i>Amount</i>			
	P00049	10/13/2005	25.00			
	P00049	10/13/2005	50.00			
	P00053	10/13/2005	-56.61			
	<b>Balance</b>	<b>33.39</b>				
12	G25	25.00	25.00	10/13/2005		P00054
1234	G25	25.00	25.00	10/13/2005		P00054
12345	g50	50.00	50.00	10/13/2005		P00054