

# Smart, Gift Cards

1

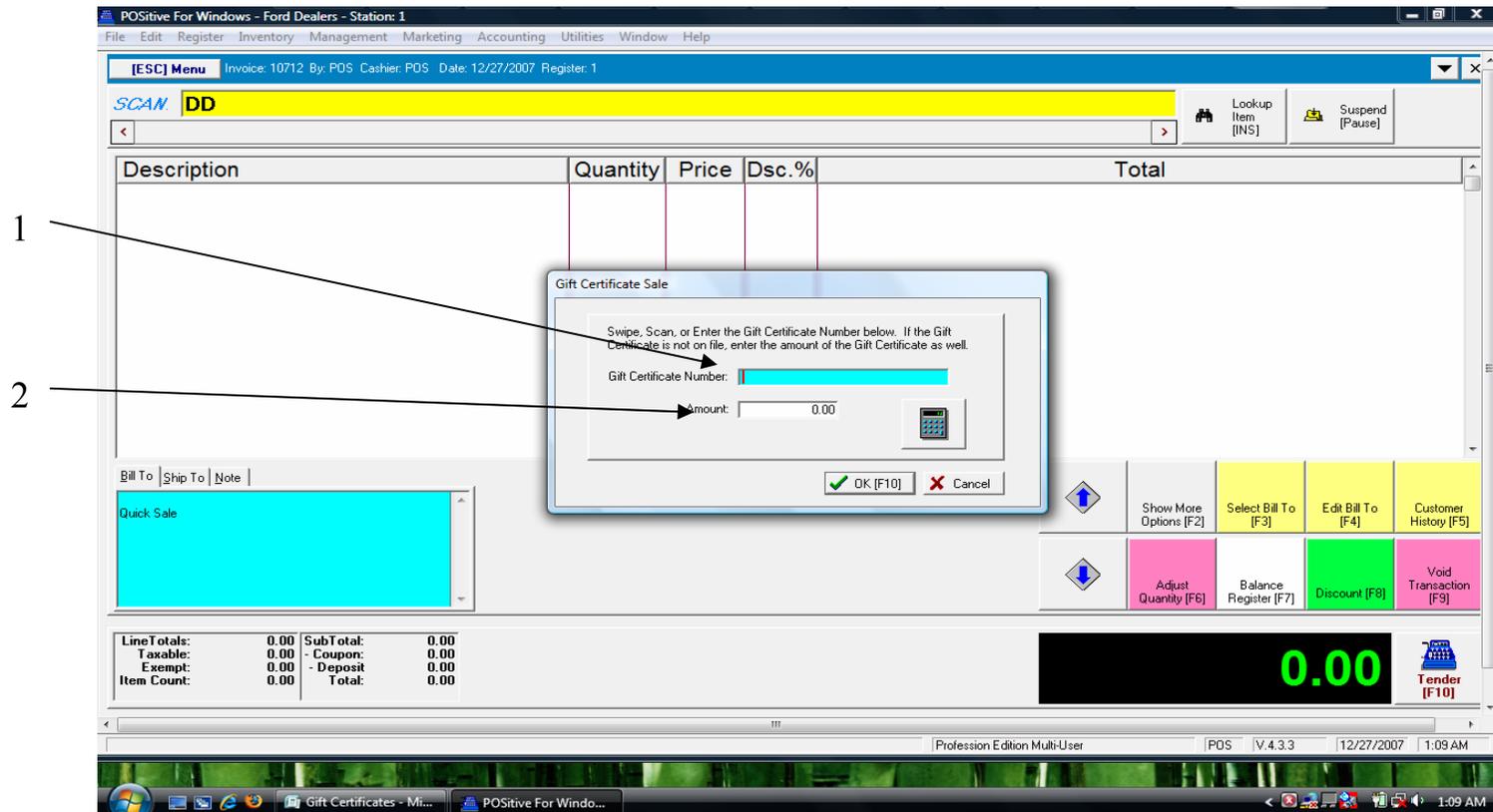


To sell a Gift Certificate, start at the Invoice (sales) Screen.

1. On the keyboard select the Gift Card Key from the row of “program” keys.
2. This is the same as entering the SKU, DD manually on the scan line.

# Gift Cards

2



When you select the **Gift Card Key**, a Gift Certificate prompt will appear.

1. **Scan the gift card bar code, or manually enter the 5 digits.**
2. **Enter the dollar amount to be deposited on the card.**

# Smart Gift Card Sales

3

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POStive For Windows - Ford Dealers - Station: 1

File Edit Register Inventory Management Marketing Accounting Utilities Window Help

[ESC] Menu Invoice: 10713 By: POS Cashier: POS Date: 12/27/2007 Register: 1

SCAN DD

Lookup Item [INS] Suspend [Pause]

Description	Quantity	Price	Dsc.%	Total
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Gift Certificate Sale

Swipe, Scan, or Enter the Gift Certificate Number below. If the Gift Certificate is not on file, enter the amount of the Gift Certificate as well.

Gift Certificate Number: 89123

Amount: 50.00

OK (F10) Cancel

Bill To | Ship To | Note |

Quick Sale

Line Totals:	0.00	SubTotal:	0.00
Taxable:	0.00	- Coupon:	0.00
Exempt:	0.00	- Deposit:	0.00
Item Count:	0.00	Total:	0.00

Show More Options [F2] Select Bill To [F3] Edit Bill To [F4] Customer History [F5]

Adjust Quantity [F6] Balance Register [F7] Discount [F8] Void Transaction [F9]

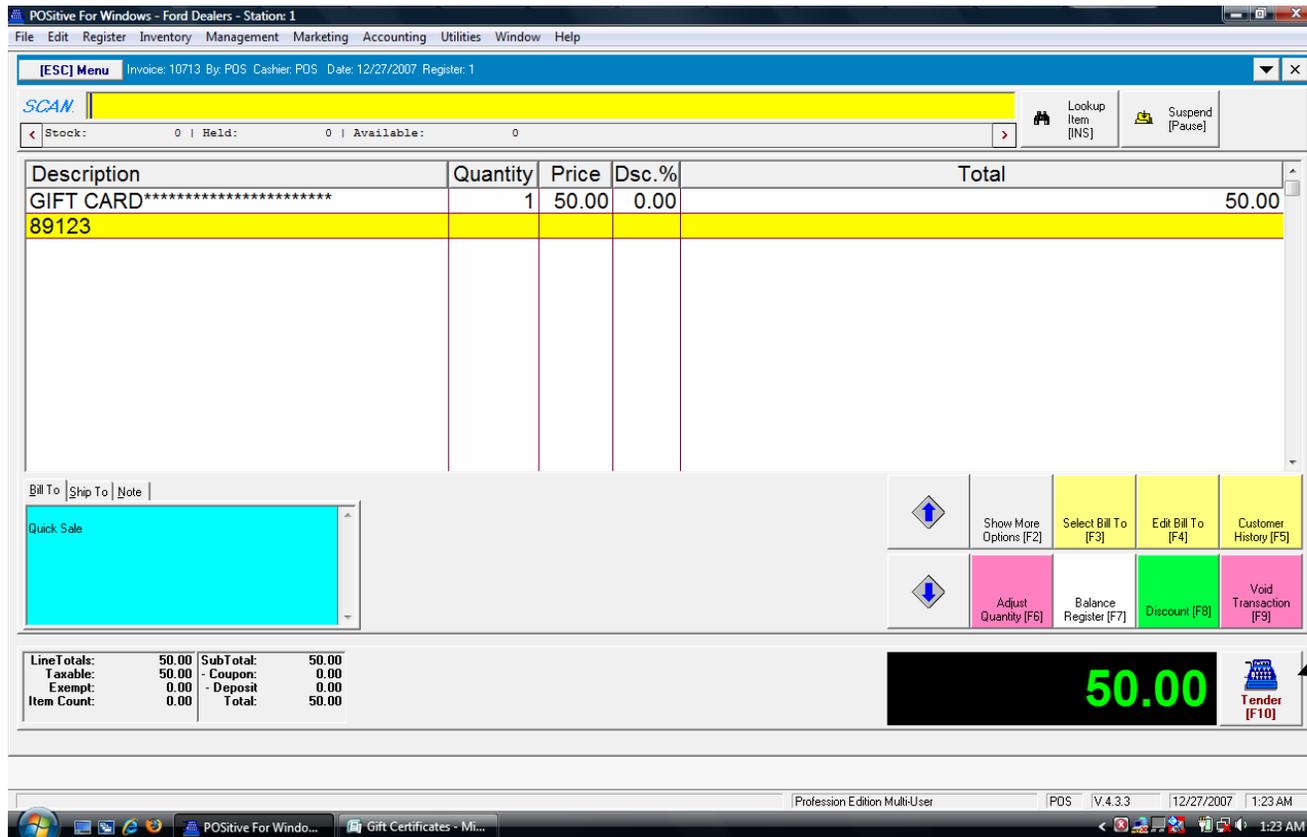
0.00 Tender [F10]

Profession Edition Multi-User POS V.4.3.3 12/27/2007 1:15 AM

1. **Click OK (or F10) to accept the gift card number and dollar amount.**

# Gift Card Sales

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See the Barcode (tracking #) appear under the Gift Card description

1. Complete the sale by accepting tender for the dollar amount owed.
2. To tender quickly, use the hot keys for (cash, credit card, check, ..etc.)

# Accepting a Gift Card as Tender

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The screenshot shows the POS system interface for 'Ford Dealers - Station: 1'. The main window displays a sales screen with the following details:

- Item:** PATROIT HOODIE RED LARGE
- Quantity:** 1
- Price:** 35.00
- Dsc. %:** 0.00
- Total:** 35.00

The bottom right of the screen shows a large green display of **35.00** and a **Tender [F10]** button. The bottom status bar indicates 'Profession Edition Multi-User', 'POS V.4.3.3', '2/11/2008', and '12:22 AM'.

In a new Sales Screen.....

1. Scan or enter the SKU for the item being sold.

# Customer tracking a Gift Card Tender

The screenshot shows the POS software interface for 'Ford Dealers - Station: 1'. The main window displays a transaction for 'PATROIT HOODIE RED LARGE' with a quantity of 1, price of 35.00, and a total of 35.00. A customer list is visible on the left, with 'Brittany Speary' selected. An 'Enter Note' dialog box is open in the center, containing the customer name 'Brittany Speary'. The total amount is 35.00, and a tender button is visible at the bottom right.

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Description	Quantity	Price	Dsc. %	Total
PATROIT HOODIE RED LARGE	1	35.00	0.00	35.00

Account: 12 Code: 12  
 Brittany Speary  
 Room 305  
 CLARKSTON, MI 48346  
 Home: 248 Work: 248  
 Terms: 30

Line Totals: 35.00 Sub Total: 35.00  
 Taxable: 0.00 Coupon: 0.00  
 Exempt: 0.00 - Deposit: 0.00  
 Item Count: 1.00 Total: 35.00

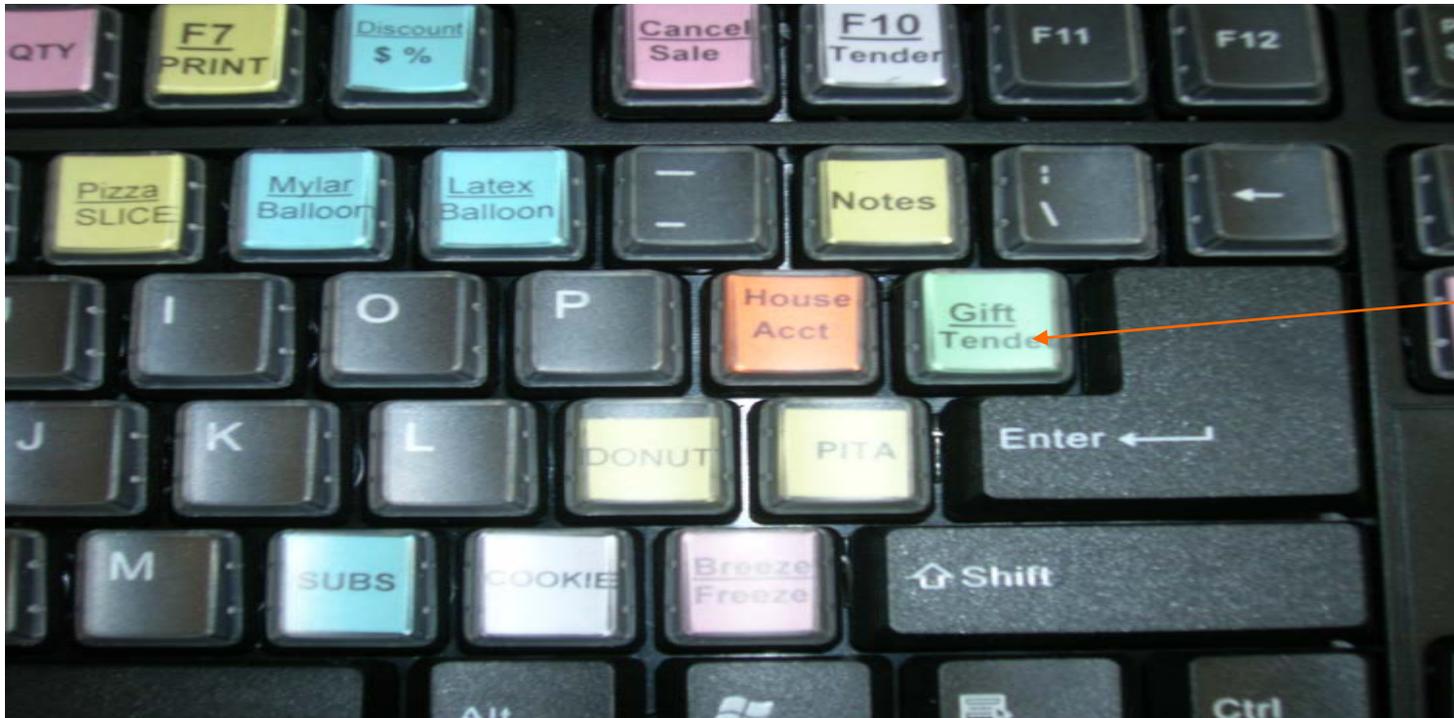
35.00  
 Tender [F10]

## Customer Tracking is Optional and not required

The Gift Card User (customer) can be tracked for your sales records. Use one of two methods:

1. **Identify the customer from your customer list and enter on the invoice.**
2. **Identify the customer by using the Note function (hot key) and enter their name.**  
 (Either way the customer's name will show up in invoice history for the sales transaction.)

## Accepting a Gift Card as Tender

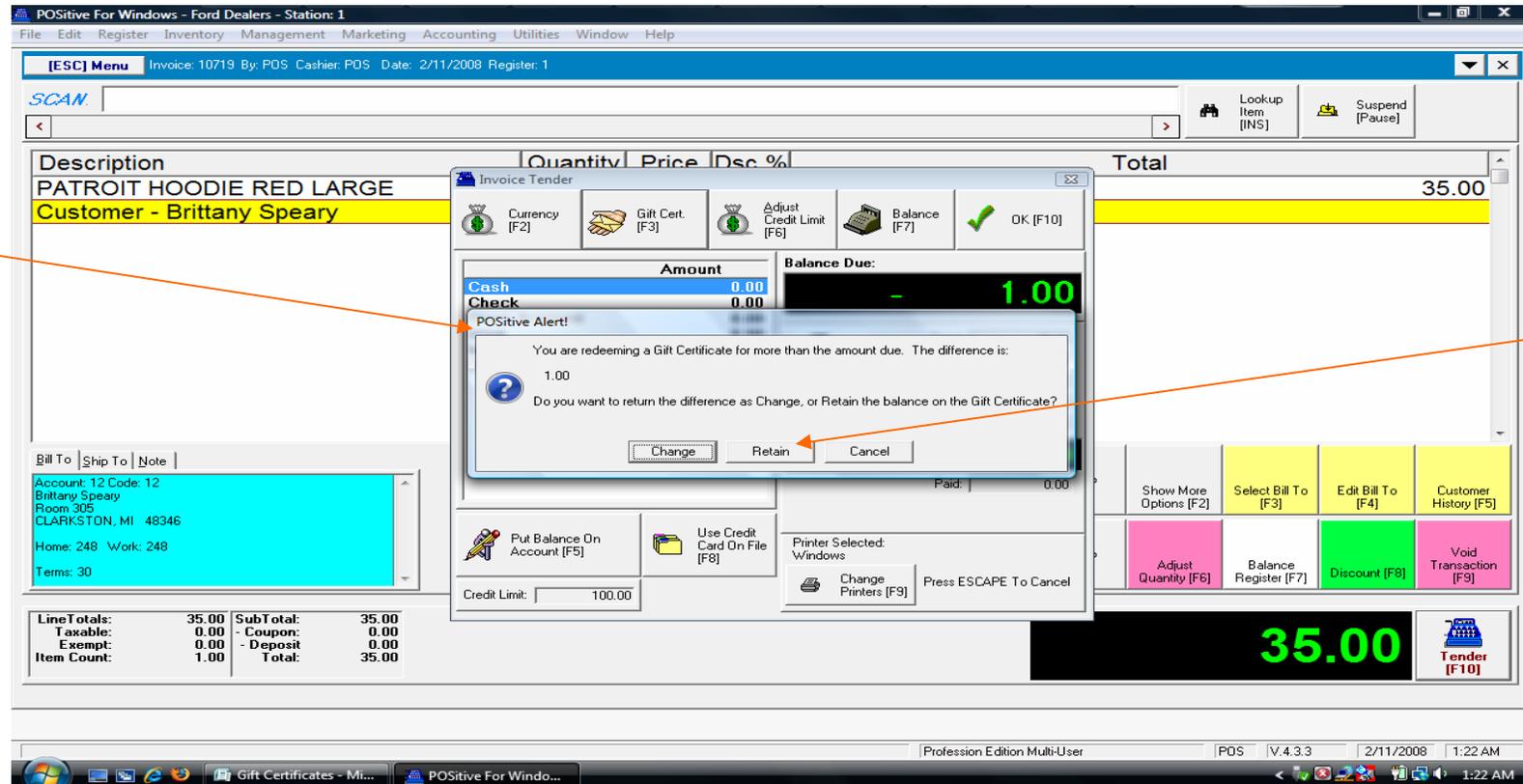


When the customer presents the Gift Certificate for tender.....

1. **Choose the Gift Tender hot key on your Smart Keyboard.**  
**This will take you directly to Gift Tender!**



# Accepting a Gift Card as Tender

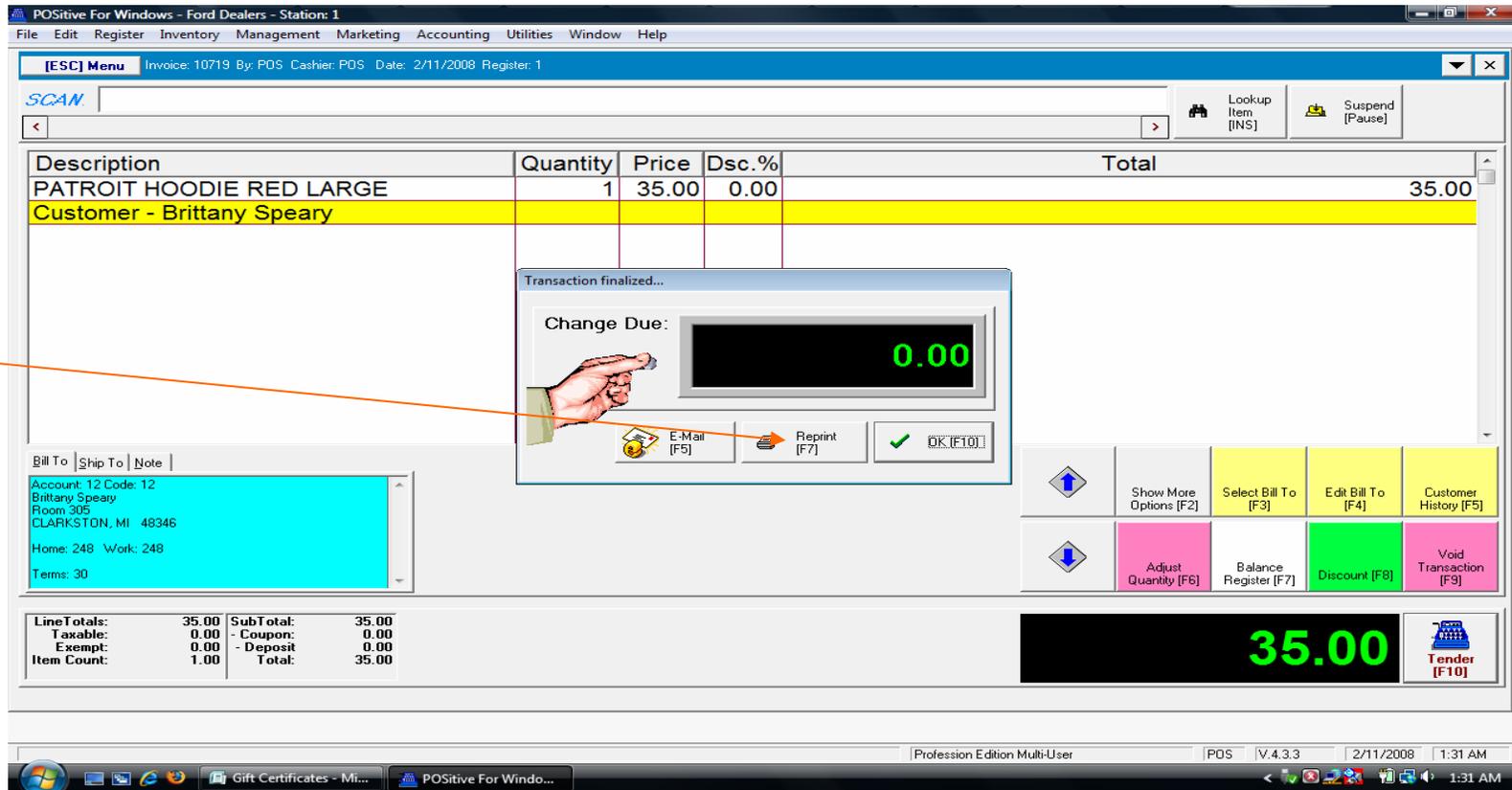


**You may see a prompt requesting further action.** (You can program POS to always bypass this prompt)

1. **If the card still has a dollar value remaining, a screen appears asking what to do with the balance— Give Change or Retain the Balance?**
2. **Instruct your employees to always Retain the Balance.**

# Finalizing a Sale with Gift Card Tender

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Complete the sale as you would any other sales transaction.

1. **Print two receipts, one for the customer and one for your records.**  
Leave Gift Card receipt in drawer to reference when balancing cash drawer.

# Printing a Receipt for a Sale with Gift Card Tender

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The screenshot shows the POS software interface with a 'Preview' window open. The receipt details are as follows:

Qty	Description	Price	Total
1	10811RLG	35.00	35.00
PATROIT HOODIE RED LARGE			
Customer - Brittany Speary			
SubTotal:			35.00
Exempt:			0.00
Total:			35.00
Gift Certificate:			35.00
Total Paid:			35.00
Change Due:			0.00
Gift Cert. Balance:			1.00

Below the table, the receipt includes the text: "Welcome to the XYZ School Store".

The sales receipt has Gift Card info. too.....

1. The remaining balance will print on the receipt for you and the customer to view.
2. If there is no balance remaining, retain the card.  
At a later date, a Manager can voided the Card from your Gift Certificate list, and can be reused again!

# Accessing the Gift Certificate Manager

The screenshot shows the POSitive For Windows Manager Console interface. The window title is "POSitive For Windows - Ford Dealers - Station: 1". The menu bar includes File, Edit, Register, Inventory, Management, Marketing, Accounting, Utilities, Window, and Help. The main area contains several sections:

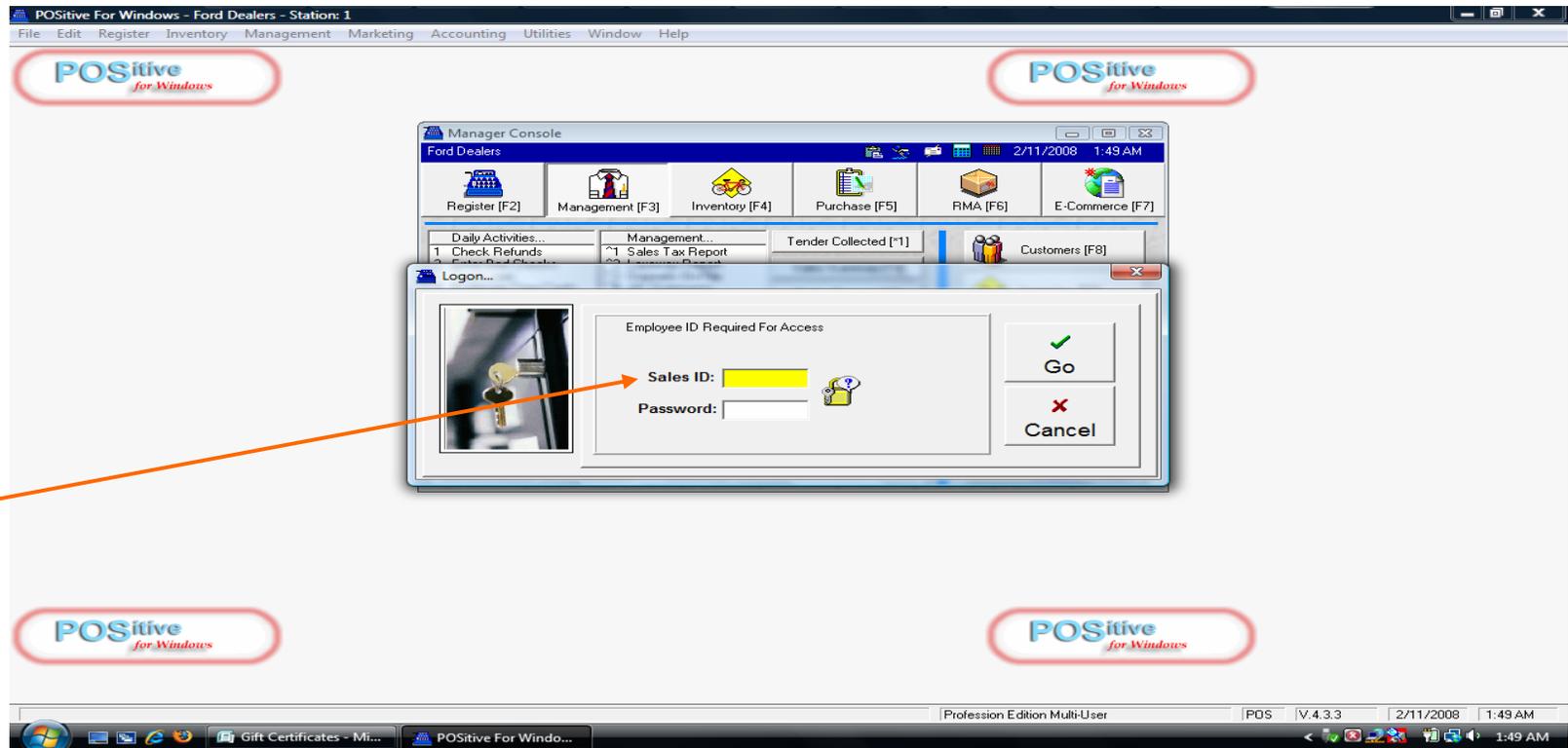
- Manager Console:** A central panel with a menu on the left and various reports on the right. The menu items are:
  - Daily Activities...
    - 1 Check Refunds
    - 2 Enter Bad Checks
    - 3 Employees
    - 4 Employee Time Cards
    - 5 Cost Verifier
    - 6 Gift Cert. Mgr.** (highlighted)
    - 7 Credit Card Manager
  - Management...
    - ^1 Sales Tax Report
    - ^2 Layaway Report
    - ^3 Deposits On File
    - ^4 AR Statements
    - ^5 AR Aging
    - ^6 AR Payments
- Reports:** Tender Collected [\*1], Sales Summary [\*2], Sales Reports [\*3], System Setup [\*4], Stations Setup [\*5].
- Other Tools:** Customers [F8], Inventory [F9], Vendors [\*F9], Open Register [F10], Report Center [\*R].
- Logged In:** POS
- Calendar:** February 2008, with a calendar grid showing dates from 3 to 29.
- Security:** Secure Log Out [\*7], Clock In/Out [Shift F11].

An orange arrow labeled "1" points to the "6 Gift Cert. Mgr." option in the Management menu.

To view all Gift Certificate transactions:

1. **Go to—>Management Center (F3) in Manager Console, Go to—>Gift Certificate Manager (# 6)**

# Accessing the Gift Certificate Manager



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1. Only Teachers have security clearance to gain access to the Gift Certificate Manager  
Login in with your ID and password.

# Viewing & Reporting with the Gift Certificate Manager

The screenshot displays the 'Gift Certificate Manager' window within the 'POSitive for Windows' application. The window title is 'Manager Console Ford Dealers' and it shows a list of gift certificates. The 'Generate' button is labeled with [F5], 'Print' with [F7], and 'Sales Report' with [F8].

Gift Number	Date	Amount	Spent	Remaining	Last Used
21008	4/ 3/2007	50.00	35.00	15.00	4/ 3/2007
24803	4/28/2007	50.00	0.00	50.00	/ /
24844	4/18/2007	35.00	0.00	35.00	/ /
24846	11/ 4/2006	75.00	0.00	75.00	/ /
29206	4/29/2007	100.00	21.00	79.00	4/29/2007
29213	4/30/2007	25.00	1.00	24.00	4/30/2007
29217	4/29/2007	25.00	25.00	0.00	4/29/2007
29222	4/29/2007	25.00	1.00	24.00	4/29/2007
29226	4/29/2007	50.00	50.00	0.00	4/29/2007
29233	4/30/2007	25.00	10.00	15.00	4/30/2007

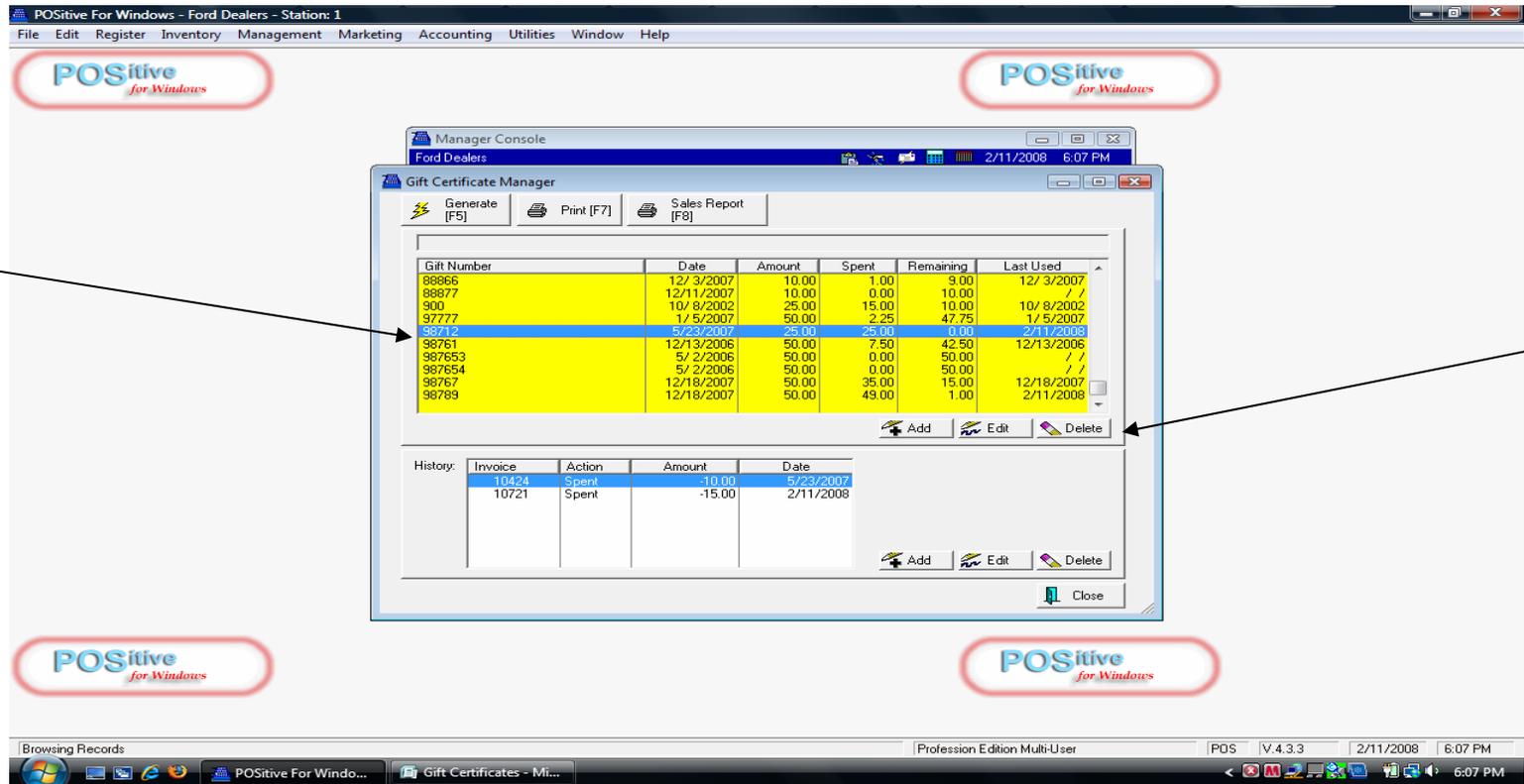
  

Invoice	Action	Amount	Date
10232	Spent	-1.00	4/29/2007
10283	Spent	-35.00	4/29/2007
10323	Spent	-14.00	4/29/2007

## In Gift Certificate Manager:

1. All Gift Cards sold will appear by Card (barcode) number.  
Other info to view: Date Sold with \$ amount, Amount Spent, Remaining \$ Balance, and Last Date Used.
2. Every transaction the card was used for will appear when a card is highlighted...
3. Choose Print (F7) for a Report of Outstanding Gift Card Balances
4. To Print a Gift Card Sales History (by date), select Sales Report (F8).

# Deleting a Gift Certificate # to Re-use Gift Cards



To Reuse a Gift Card, it must be deleted from the system.

1. Locate the card you have collected from the customer. Remaining will be \$0.00
2. Click the Delete button to remove the card number from the active list.