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Category	Technical
Course	POS Config
Version	1.0
Client	Generic
Software	2.13.100

# Configure GiveX Gift Cards

Gift cards allow customers to pre-pay for goods. Gift Cards can be given:

- by a customer to another customer
- by retailers to customers, or as a result of other initiatives like Christmas Clubs or for other loyalty programs that your business has approved.

**Hints and Tips**

- ✓ Your business may sell two types of gift cards:
  - **Fixed:** the dollar value is preset on the gift card. Price changes are not allowed.
  - **Variable:** the dollar value is loaded onto the gift card at the time of sale (retail is set to \$0.00 to prompt for price).
- ✓ Gift cards are balance reducing; the dollar balance is centrally managed, and reduces each time the customer presents the card during tendering. The customer keeps the card to use in subsequent transactions, until the balance is zero.
- ✓ Gift card stock usually has an **EAN** on the card or packaging.
  - If your business uses other stock, design your own EAN and link it to a quick item button at POS. Refer to the [TECH-1f Configure POS Quick Items Fact Sheet](#).
- ✓ If a Head Office user, all the **POS Config** settings for gift cards can be performed at a higher location hierarchy and exported to the store/s.
  - This excludes the GiveX **user name** and **password**, which must be entered at register level (step 18).

**Procedure to Configure GiveX Gift Cards**

1.	Obtain the Acquirer details and username and password from GiveX. <i>*This is usually one set per store.*</i>	
2.	Create a suitable department structure for Gift Cards reporting. <i>*Refer to the <a href="#">TECH-4b Configure Department Hierarchies Fact Sheet</a>.*</i>	
3.	Create a supplier record for GiveX. <i>*Refer to the <a href="#">INV-5a Create a New Supplier Account Fact Sheet</a>.*</i>	
4.	Create a stock record for each gift card denomination that your business will sell. <ul style="list-style-type: none"> <li>• Set aside a range of <b>stock codes</b> to use for gift cards.</li> <li>• Select the <b>Department</b> hierarchy created at step 2.</li> <li>• Select the <b>Supplier</b> created at step 3.</li> <li>• Set <b>Normal Retail price</b> to the value of the fixed gift card, or to \$0.00 for variable gift cards.</li> <li>• Set <b>Case Qty, Pack Size, and UPP</b> to [1].</li> <li>• Set <b>GST</b> to zero.</li> </ul> <i>*Refer to the <a href="#">PRO-1a Create a New Stock Record Fact Sheet</a>.*</i>	
5.	From the HOS/BOS <b>System</b> menu, select <b>Location Setup</b> .	
6.	If a HOS User, select the Location that you want to define. <i>*You'll be defining the configuration for all stores at and below the level that you select.*</i>	
7.	Double-click <b>Configure</b> . <i>*If a HOS user, click <b>Yes</b> to continue.*</i>	
		

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**Hints and Tips**

- ✓ **Tender** tab Options:
  - **Max Change:** usually set to **\$0.00**, so that POS reduces the balance on the gift card rather than issuing change when a gift card is tendered (and alternative tender amounts won't be displayed).
  - **Cancel Tender** allows the operator to cancel the gift card tender if it was incorrectly selected or there are insufficient funds on the card.
  - **Refund Allowed** should only be enabled if your business allows refunds to be loaded onto a gift card (rather than given a store voucher, cash etc).
  - **Suggest Exact Tender Amount only** will hide the **UP to Balance** button on the gift card tender screen.
  
- ✓ The **Up to Balance** option at POS automatically deducts the full transaction amount from the balance on the gift card. This is useful if the customer isn't sure how much is left on the card.

8. Complete the following steps to enable gift card tender at POS.
- Select the **Tender -> Tender Type** tab.
  - Select the **Tender Type** option **Gift Card**.
  - Select the **Enable Tender Type** check box.
  - Select the **Max Change** check box, and set it to \$0.00.
  - Select the **Cancel Tender** check box.
  - Select the **Refund Allowed** check box if applicable.
- \*See Hints and Tips.\**

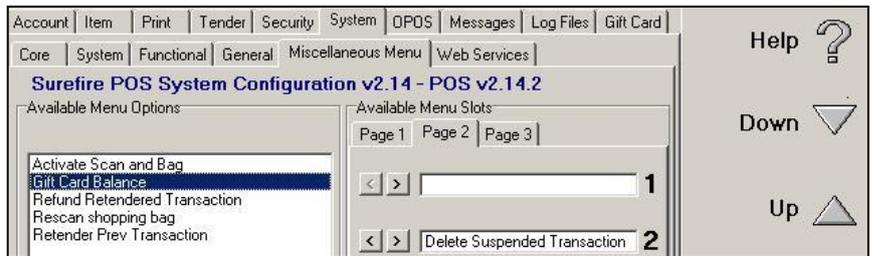
9. If required, complete the following steps to enable the **Up to Balance Option** at POS:
- Select the **Tender -> Tender Options** tab.
  - Select the **Suggest amount for gift cert. Tender** check box.

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**Hints and Tips**

- ✓ **General** tab selections:
  - **Minimum Value in Cents:** the minimum value that can be loaded onto a gift card.
  - **Maximum Value in Cents:** the maximum dollar value that can be loaded onto a gift card without supervisor authorisation being prompted.
  - **Maximum Multiple in Cents:** The value of the gift card being purchased must be a multiple of this setting. It prevents the situation where the customer gains through cash purchase rounding rules.
  - **Suggest Tender Amounts** check box: when a variable card is scanned, POS will display the **Variable Card Amounts** as a suggested load value.

10. Complete the following steps to enable gift card balance enquiry at POS:
- Select the **System -> Miscellaneous Menu** tab.
  - In the Available Menu Options section, select **Gift Card Balance**.
  - Select the applicable **Page** tab.
  - Click to allocate the option to this slot.



11. Complete the following steps to configure the sale of gift cards:
- Select the **Gift Card -> General** tab.
  - Select the required **Minimum** and **Maximum Value in Cents**.
  - Select the required **Minimum Multiple in cents**.
  - Select the **Suggest tender amounts** check box.
  - Select the applicable **Cost Price for Variable Cards** for reporting.



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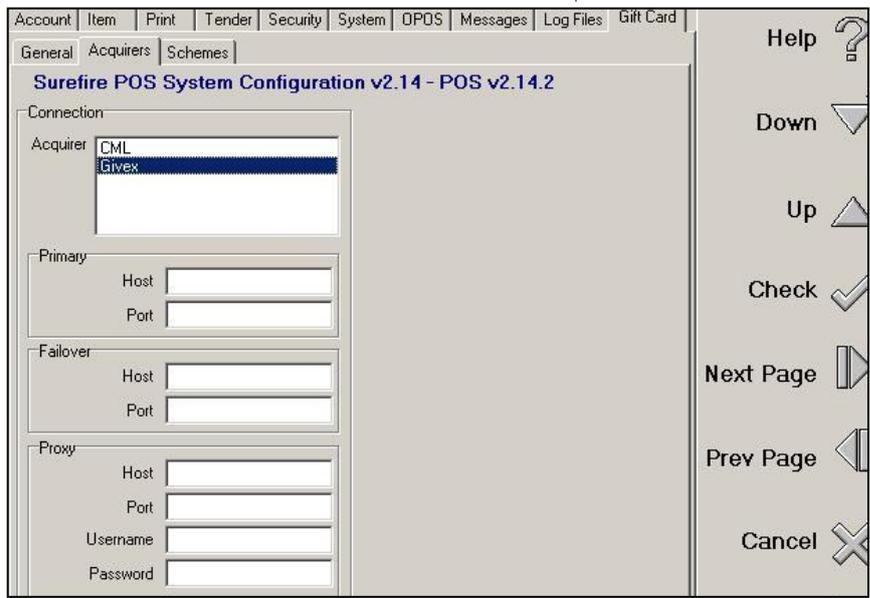
**Hints and Tips**

- ✓ **Schemes** are used so that POS goes into gift card mode when the operator scans a gift card EAN in a transaction.
  - You must create at least one scheme, to record the **Acquirer Username** and **Password**, and card prefixes.
  - You can add optional receipt footer text that prints at the end of the gift card redemption receipt.

12. Complete the following steps to record the acquirer connection details for GiveX:

- Select the **Gift Card -> Acquirers** tab.
- In the **Acquirer** field, select **GiveX**.
- Type the connection details provided by GiveX at step 1.

*\*The **Primary Host** and **Port** must be entered as a minimum.\**



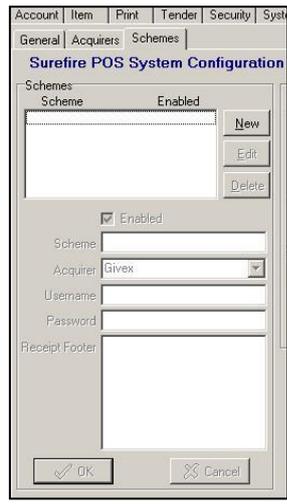
13. Select the **Gift Card -> Schemes** tab.



14. Complete the following steps in the Schemes section:

- Click **New**.
- Select the **Enabled** check box.
- In the **Scheme** field, type a name for this scheme.
- Select the **Acquirer** option **GiveX**.
- In the **Receipt Footer** section, type any applicable text.
- Click **OK**.
- Repeat these steps if there's another scheme.

*\*See Hints and Tips.\**



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**Hints and Tips**

- ✓ You must record the **Prefix** of each gift card EAN that your business sells. This is usually the first few digits of the EAN.
  - If all cards start with the same digits and will belong to the same scheme, you only need to record one prefix.
- ✓ **ID** refers to how the card is read at POS; either by its **Barcode** (EAN) or **Mag Strip** on the card.
- ✓ **Method** is only set to **Redeem** if you have fixed cards that have been preloaded with a value (i.e. to hand out at a new store opening). It allows quick redemption of cards that have this prefix; the operator can scan the gift card identification number into the Item Menu like a normal product, which then immediately displays the tendering menu for them to enter the gift card amount (rather than having to select **Process Payment -> Gift Card**).
- ✓ The configuration is sent to the POS when File Transfer next runs (unless a message is displayed when you saved that POS needs to be restarted first); if a HOS user, this occurs after HOS Export/Import next runs.

<p>15. Complete the following steps in the Cards section:</p> <ul style="list-style-type: none"> <li>• Click <b>New</b>.</li> <li>• In the <b>Prefix</b> field, type the unique identifier for the gift card.</li> <li>• Select the applicable <b>Scheme</b> for this card.</li> <li>• Select how the <b>ID</b> is captured.</li> <li>• You usually leave the <b>Method</b> at the default option <b>Activate</b>.</li> <li>• Click <b>OK</b>.</li> <li>• Repeat these steps if there's another set of POS rules for a different card.</li> </ul> <p><i>*See Hints and Tips.*</i></p>	
<p>16. Click .</p>	
<p>17. Click <b>Yes</b> to confirm, then <b>OK</b>.</p>	
<p>18. Complete the following step to record the GiveX connection user name and password against each register:</p> <ul style="list-style-type: none"> <li>• In Location Setup, select the first register listed under the store.</li> <li>• Double-click <b>Configure</b>.</li> <li>• Select the <b>Gift Card -&gt; Schemes</b> tab.</li> <li>• Select the scheme.</li> <li>• Click <b>Edit</b>.</li> <li>• In the <b>User Name</b> and <b>Password</b> field, type the details provided by Givex at step 1.</li> <li>• Click <b>OK</b>.</li> </ul> <p><i>*Record the User Name and Password for each scheme listed.*</i></p> <ul style="list-style-type: none"> <li>• Click <b>Save</b></li> <li>• Click <b>Yes</b> to confirm, then <b>OK</b>.</li> <li>• Repeat these steps for each register listed against the store.</li> </ul>	
<p>19. Click  to exit the Location Setup screen.</p>	