

# Gift Cards/ Certificates

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# Introduction to Gift Cards/Certificates

PrismCore AR maintains the balances for all gift cards/certificates (GCs).

GCs of any value are sold at the POS register, maintained as a customer record in PrismCore AR, then, when used as a tender, the balance is decreased. You can sell one GC or multiple GCs.

**Note:** The GC number populates the Customer ID field.

In addition, at the POS register, you can do the following with existing GCs:

- Add to the existing balance
- Balance inquiry

To use the GC features in PrismPOS, AR setup is required. This setup includes:

- GC Account record required
- GC Tender record created and/or verified, with settings matching the GC Account record
- If you want to include the sale/refund information on POS register reports, create Pay In and Pay Out codes

For those with GC balances to be carried into this system, use the Gift Certificate Sales module. See *the GC Transfer from Previous System section*.

# GC Account

**Objective:** Review how to create an account in Account Maintenance

## EXERCISE 1

1. Access **PrismCore Admin**.
2. Access **Account Maintenance**.
3. Select **Help, Contents and Index, Account Maintenance, and Adding Accounts in Account Maintenance**.
4. Review the steps.
5. Select **Searching in Account Maintenance**.
6. Review the information.
7. Minimize **Help**.

**Objective:** Locate and edit the existing GIFT CARD/CERTIFICATE account.

## EXERCISE 2

1. Access **Account Maintenance**.
2. Search for the **GIFT CARD/CERTIFICATE** account.
3. Using the details for each tab below, edit the account.

<i>General Tab</i>					
Name: <b>GIFT CARD/CERTIFICATE</b>					
<i>Address Tab – leave blank</i>					
<i>Billing Tab</i>					
Bill to:	<b>Customer</b>				
Statement:	<b>No Statement</b>		Balance Type:	<b>Open Item</b>	
<i>Finance Tab</i>					
Finance Charge: <b>No Finance Charges</b>					
<i>POS Tab (Use same settings for Gift Card/Certificate POS Tender Type on next page.)</i>					
Tender:	<b>GIFT CARD/CERTIFICATE</b>				

<i>DCC Discount Tab</i>
Leave all unchecked ( <i>nothing checked allows all items to be sold</i> )
<i>Non-Merch Tab</i>
Allow Non Merch: Select <b>All Non-Merch</b>

# GC Tender

**Objective:** Learn how to set up a tender.

## EXERCISE 1

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1. Access **POS Tab**.
  2. Access **Parameters**, open **Tenders** module.
  3. Access **Help** to view POS Help.
  4. Access **Parameters** and **Tenders**.
  5. With the instructor, review the information on adding a tender.
  6. Minimize **Help**.
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The tender setup includes a variety of settings when the GC tender is used.

- Authorization > Credit Service > AR Gift Cert
- Card/Bar Code Option
- Variety of options that must match the GC Account options

**Note:** Each inventory location can have different settings.

## EXERCISE 2

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Search for the GIFT CARD/CERTIFICATE tender and review the information.

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# GC Pay In/ Pay Out

**Objective:** Learn how to set up GC Pay In and GC Pay Out.

## EXERCISE 1

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1. Access **POS Help**.
  2. Select **Pay In & Pay Out** topic.
  3. Review the two paragraphs about each.
  4. Review the remaining information.
  5. Minimize **Help**.
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**Note:** Each location requires its own Pay In code and/or Pay Out code.

Assign those codes in **PrismCore Admin > POS tab > Parameters > General Parameters**.

## EXERCISE 2

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In the Pay In/Pay Out module locate and review the GC Issue and GC Refund set up.

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## EXERCISE 3

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1. Access General Parameters.
2. Select MSU for location.
3. Review the set up on the line shown below:

MSU Bkst	360 - PayIn Fee Code for Gc Purchased with Ar	GC Issue
MSU Bkst	360 - PayOut Fee Code for Gc Purchased with Ar	GC Refund

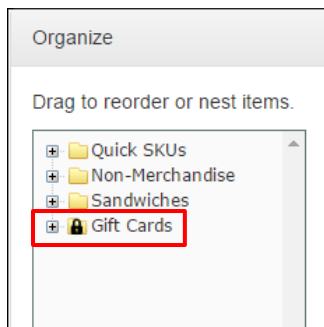
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**Note:** Each location requires these settings.

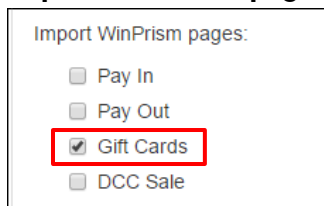
# GCs & Admin Tool

To make the Gift Cards button available at the POS register, include Gift Cards in the Quick Menu Profile.

1. Access Admin Tool > Configuration > Quick Menu > Quick Menu Profiles.
2. From the **Choose POS System** dropdown, select the POS System.
3. From the list of profiles below, locate the Is Default profile.
4. Select the **Edit** button.
5. From the **Edit Profile**, in the **Organize** page, verify **Gift Cards** is listed.



6. If it is not included in the list, while still in the Organize page, scroll down to the **Import PrismCore pages** section and check the **Gift Cards** checkbox.





# Gift Cards at PrismPOS Register

## Gift Card Activation

1. To sell and activate a gift card, select the **Quick Menu**.
  2. Select **Gift Card**.
- Note:** Depending on your store, you may have multiple options under gift card.
3. Select the appropriate button under **Gift Card**, for example **GC**.
  4. The **Details Frame** displays in two parts, **Gift Card** on the left and **Enter the Pay In Amount** on the right.

The screenshot shows the PrismPOS Register interface for gift card activation. The screen is split into two main sections. The left section, titled "Gift Card", shows a text input field containing "GC5566". The right section, titled "Enter the Pay In Amount", features a numeric keypad with buttons for digits 1-9, 0, and 00, along with a "\$10.00" display and a "Backspace" button. At the bottom of the screen, there are "Back" and "Add" buttons.

5. Swipe or enter the gift card number on the left and the amount of the gift card on the right.
6. Select **Add** in lower right corner of **Details Frame**.
7. Complete the transaction as normal.

## Add to the Balance of an Existing Gift Card at PrismPOS Register

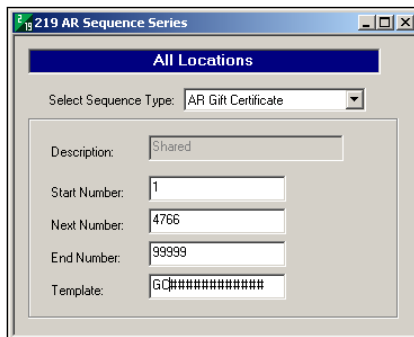
1. To add to the balance of an existing gift card, select the **Quick Menu**.
  2. Select **Gift Card**.
- Note:** Depending on your store, you may have multiple options under gift card.
3. Select the appropriate button under **Gift Card**, for example **GC**.
  4. The **Details Frame** displays in two parts, **Gift Card** on the left and **Enter the Pay In Amount** on the right.
  5. Swipe or enter the gift card number on the left and the amount to add to the gift card on the right.
  6. Select **Add** in lower right corner of **Details Frame**.
  7. Complete the transaction as normal.

## Refund Gift Card

1. To refund an existing gift card, select the **Quick Menu**.
  2. Select **Gift Card**.
- Note:** Depending on your store, you may have multiple options under gift card.
3. Select the appropriate button under **Gift Card**, for example **GC**.
  4. The **Details Frame** displays in two parts, **Gift Card** on the left and **Enter the Pay In Amount** on the right.
  5. Swipe or enter the gift card number on the left and the amount to add to the gift card on the right.
  6. Select **Add** in lower right corner of **Details Frame**.
  7. Select **Refund Item** in lower right corner of the **Details Frame**.
  8. Complete the transaction as normal.

# GC Sequence Series

When adding GCs as donations or to provide GCs for a department on campus, for example, the GCs are issued in PrismCore AR. The gift card/certificate template is stored in the sequence series. Verify that the sequence series for the AR Gift Certificate sequence type matches the numbering sequence of the GCs you sell in your store.



1. Access **Sequence Series** (Ctrl+J 219), **PrismCore Admin > Accounting tab > Receivables folder > Sequence Series**.
2. Click on the down arrow and select **AR Gift Certificate**.
3. The End Number and the Template need to match the gift cards that you have received. The end number represents the highest number available for the gift card. Usually, it contains as many nine's as the digits on your gift cards.
4. The template should match the letters and number of digits on your card. The number signs represent digits. If your gift cards use the letters "GC" in front of the numbers, you will want to precede the number signs (#) with the letters GC.
5. The sequence series above matches the example gift card below.



6. When finished, select **Save**  to save your changes.

# GC Sales from Accounts Receivable

**Objective:** Learn about gift card sales from Accounts Receivable.

## EXERCISE 1

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1. Access **AR Help**.
  2. Access **Gift Certificate Sales**, and select **Adding a Gift Certificate Sale**.
  3. With the instructor, review the steps involved.
  4. Review the questions and answers below.
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**Question 1:** Why might you enter gift certificate sales in the back office?

*Answer:* Inability to charge the gift certificate purchase to a customer's account at the register. Cashiers do not have the necessary rights in the Point-of-Sale system to add customers. Entering opening balances for gift certificates. Entering gift certificates that have been given as promotional items.

**Question 2:** What are the two main steps involved in Gift Certificate Sales from Accounts Receivable?

*Answer:*

1. Selling the gift cards at POS has a non-merchandise gift card.
2. Creating the gift cards in Accounts Receivable.

**Situation:** You have sold \$150 in gift cards at the register. This is for 10, \$15.00 gift cards. Now you need to create the gift cards in Accounts Receivable

## EXERCISE 1

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1. Access **Gift Certificate Sales**.
  2. Select **Insert Record** and enter the following in the fields, then select **OK**.  
**Purchase Field:** Receipt # **RC20656**  
**Date:** Today's date  
**Location:** **MSU Bkst**
  3. In the header, enter **\$150.00** in the **Purchase Amount**.
  4. Select **Hammer** options, **Auto Add Gift Certificates**, and enter the following in the fields, then select **OK**.  
**Account:** Use ellipsis to locate **Gift Card**.  
**Start Number:** **775** **End Number:** **784**  
**Start Date:** Today's date **End Date:** **XX/XX/2999**  
**Amount Each:** **\$15.00**
  5. Select **Hammer** options and **Post Gift Certificate**.
  6. Select **Yes**, to the **Was the Sale Already Entered in POS?**, dialog box.
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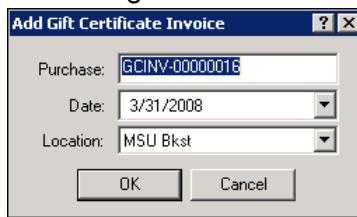
# GC Transfer from Previous System

Transfer GC balances from your previous system in the PrismCore Gift Certificate Sales module. Do this in three steps.

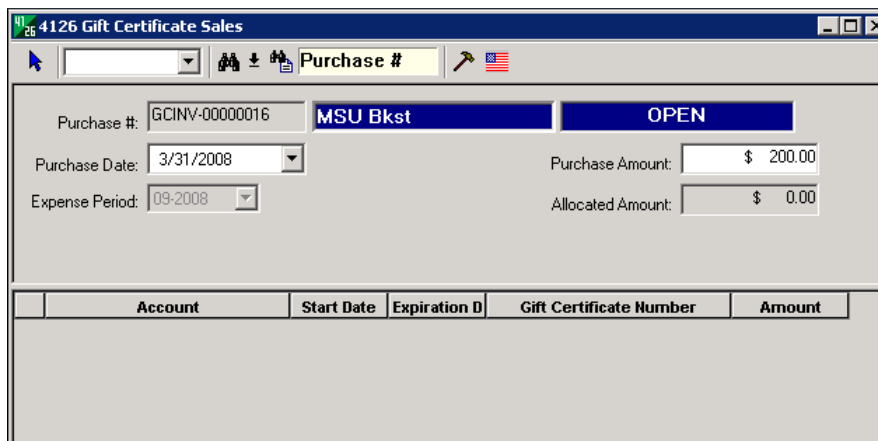
1. Create the Gift Certificate Sales record with the total balance for all GCs being transferred.
2. In the detail, add each individual GC number, the start date, expiration date.
3. Post Gift Certificate.

## To create the record for transfer of GC balances:

1. Access **Gift Certificate Sales** (Ctrl+J 4126), **PrismCore > Accounting tab > Receivables folder > Adjustments folder > Gift Certificate Sales**.
2. Click **Insert Record** to add a new gift certificate sale.
3. From the **Add Gift Certificate Invoice** dialog, in the **Purchase** field, enter something that indicates this is a GC transfer.



4. In **Date**, enter a date prior to using PrismCore.
5. Select the **Location**.
6. Select **OK**.
7. In the header, in the **Purchase Amount**, enter the total balance due for outstanding gift certificates.
8. Save the record.



Account	Start Date	Expiration D	Gift Certificate Number	Amount
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**To add individual GCs:**

1. Right click in the detail line and select **Add Detail Item**.  
The Add Gift Certificate Detail dialog displays.

2. In the **Account**, type the account for GCs.
3. In the **Number**, enter the GC number.
4. In the **Start Date**, enter the start date.
5. In the **Expire Date**, enter the expiration date.
6. In the **Amount**, enter the balance remaining for this gift certificate.
7. Click **OK**.
8. In the header, when the allocated amount equals the purchase amount and you are finished entering all of your previous gift certificate balances, select the Hammer option **Post Gift Certificate**.

9. When completed, your previous GCs will be available for use at the cash register and in mail order.

**Objective:** Using the instructions above, learn how to transfer GCs from your previous system.

**EXERCISE 1**

GC Number	Start Date	Expiration Date	Balance
GC-00227	01/01/08	12/31/15	<b>7.50</b>
GC-00375	01/01/08	12/31/15	<b>9.79</b>
GC-00647	02/16/08	12/31/15	<b>75.00</b>
<b>Total</b>			<b>92.29</b>

# GC Customer Activity and Reports

## Gift Card Activity

**Objective:** Learn to review a redeemed GC.

### EXERCISE 1

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Review GC GC00000371.

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## Gift Certificate Sales Reports

**Objective:** Learn about the reports available at the Gift Certificate Sales module.

### EXERCISE 1

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1. Access **AR Help, Gift Certificate Sales, Available Reports in Gift Certificate Sales, Gift Certificate Report.**
  2. With the instructor, review the information that may be obtained from this report.
  3. Select **Gift Certificate Activity Report** and review the information about this report.
  4. Minimize **Help.**
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### EXERCISE 2

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1. Access **Gift Certificate Sales** module.
  2. Select **Reports** and **Gift Certificate Report.**
  3. Accept default parameters and select **OK.**
  4. Review report.
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### EXERCISE 3

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1. Access **Gift Certificate Sales** module.
  2. Select **Reports** and **Gift Certificate Activity Report.**
  3. Accept default parameters and select **OK.**
  4. Review report.
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## Other Reports Related to Gift Certificate Sales

### *Prepaid Aging Report*

Prepaid Aging reports provide the amount outstanding for each GC and activity through a specific ending date. Three types of aging reports are available: Detail, Summary, and Unapplied. On the Detail Aging report, each gift card/certificate payment, invoice and adjustment will be listed. On the Summary Aging report, one line for each gift card/certificate with their balance will be listed. On the Unapplied Aging Report only GCs that do not have an invoice or adjustment allocated or applied to them are listed.

### *Customer/Account Report*

The Customer/Account report in Customer Maintenance lists the gift card/certificate customers, their limits, amount charged and balances.

### *Payments Report*

Track GC sales by printing a Payments report.