

Setting Up In Store Gift Cards Options

There are 16 settings in Options Configuration that must be addressed prior to using In Store Gift Cards. Please review each before processing your cards at Point of Sale.

To isolate these you can simply type **OPTGC** in the Launch bar, and press Enter.

Options ID# 5473: 'Gift/Cash Card on System'

Options ID# 9070: 'In-Store Gift Card on System'

The MSY flag for these two options must be set to 'Yes' in order for the In Store Gift Card application to work. The Epicor Financial Services Group will update this setting after purchasing this application. Contact your Customer Account Manager with any questions.

Options ID# 3336: 'Record "Gift card activation" alerts', determines whether or not you want the system to generate an alert when a gift card is activated at POS. This option defaults to Y.

Options ID# 4905: 'Print a store copy receipt for bankcards'. Set this option to 'Yes' if you want to print a 'merchant' or store copy for Gift Card activations, add funds, void add funds, and cash-outs.

Options ID# 5126: 'Use card bin ranges to determine credit/debit/gift card type' should be set to 'Yes'.

Options ID# 5360: 'Gift/Cash card type' should indicate which program you are using. Contact your Customer Account Manager if you are unsure.

Gift Card Type	Options
A	Wildcard (including Ace)
B	Paymentech
C	FDMS (including True Value)
D	RBSLynk (including DIB)
E	Tender Retail

Kept By System (can be changed)

Options ID# 5364: 'Gift/Cash Card activation minimum amount'. This option determines the minimum issue amount for a sold or activated gift card. When

using option 5980, 'Force Gift/Cash Card activation', this is the minimum amount a gift card SKU can be sold for.

Options ID# 5366: 'Gift/Cash Card activation maximum amount'. This option determines the maximum issue amount for a sold or activated gift card. When using option 5980, 'Force Gift/Cash Card activation', this is the maximum amount a gift card SKU can be sold for.

Options ID# 5368: 'Gift/Cash Card cash-out maximum without M/O'. This option determines the maximum amount of a cash-out of a Gift Card without requiring a manager's override. If you always require a manager's override for a cash-out, enter 0. If you never want to require a manager's override, enter 99999.99.

Options ID# 5980: 'Force Gift/Cash Card activation'. Epicor recommends you set this option to 'Yes', so that your clerks are forced through the activation process when they sell a gift card, and, conversely, so that a gift card cannot be activated without first selling and taking payment for it.

Options ID# 5981: 'Gift/Cash Card - print amount remaining on POS receipts/invoices'. This option only applies if the option 'Gift/Cash card type' (ID# 5360) is set to A = Wildcat (Ace). Set this option to 'Yes' if you want the amount remaining on the card to print on the receipt or invoice on transactions with payment by Gift Card. Set this option to No if you do not want the amount remaining to print.

Options ID# 5982: 'Record "Gift Card Activation aborted" alert'. Set this option to 'Yes' if you want the system to record an alert if the automatic gift card activation process is aborted. This activation process occurs for each gift card sold in a sale. This process can only be aborted if the clerk or a manager doing an override has security bit 758.

Options ID# 7302: 'Days to keep completed In-Store gift card records' Enter the minimum number of days to keep In Store Gift Card records that are marked as completed.

Options ID# 9071: 'In-Store Gift Card Surcharge Amount'. This option allows you to determine a surcharge fee for inactive cards. Check with local and state laws before enabling.

Options ID# 9072: 'Number of days inactive before assessing gift card fees'. The number of days a gift card is inactive before being assessed a surcharge. The system date is compared to the last date used to identify inactivity. Check with local and state laws before enabling.

Options ID# 9076: 'In-Store Gift Card description for receipts'. Only applies to customers who use both In Store Gift Cards and a National Account card such as ACE, True Value, DIB or Rona. This is the description that will print on the receipt when they pay for a purchase with the In Store Gift Card. Payment with a National Account gift card will use the description of the Alternate Tender whose Type is set to G.

ID	SubSystem	Description	Current Value	Edit?
3336	ALERT	Record "Gift card activation" alerts	Yes	Yes
4905	POS	Print a store copy receipt for bankcards or gift card activations	Yes	Yes
5126	POS	Use card bin ranges to determine credit/debit/gift card type	Yes	Yes
5360	POS	Gift/Cash card type	A=Wildcard (including Ace)	Yes
5364	POS	Gift/Cash Card activation minimum amount	5	Yes
5366	POS	Gift/Cash Card activation maximum amount	250.00	Yes
5368	POS	Gift/Cash Card cash-out maximum without M/O	100	Yes
5473	POS	Gift/Cash Card on System	Yes	Pwd
5980	POS	Force Gift/Cash Card activation	Yes	Yes
5981	POS	Gift/Cash Card - print amount remaining on POS receipts/invoices	Yes	Yes
5982	ALERT	Record "Gift Card Activation aborted" alerts	Yes	Yes
7302	ARCHIVE	Days to keep completed In-Store gift card records	9999	Yes
9070	POS	In-Store gift card on System	Yes	Pwd
9071	POS	In-Store Gift Card Surcharge Amount	0	Yes
9072	POS	Number of days inactive before assessing gift card fees	0	Yes
9076	POS	In-Store Gift Card description for receipts	GIFTCARD	Yes

Alternate Tender

You will need to configure an available Alternate Tender to utilize Gift Cards as payment in Point of Sale. Set the following options as listed. The remaining Alternate Tender options can be set according to your business practices.

ID	SubSystem	Description	Current
5500	POS	Alternate tender 1 description	GIFT CARD
5504	POS	Alternate tender 1 available on Sale transaction?	Yes
5505	POS	Alternate tender 1 enabled?	Yes

In-Store Gift Cards Security

The following security bits are used with the In-Store Gift Card application. Please review each and alter your Role Based security accordingly.

Number	Sub System	Capability
669	POS	Allow access to WinPOS Gift Card menu functions
672	POS	Allow gift card cash-out greater than threshold
758	POS	(MO)Gift/Cash Card - ability to cancel out of gift card activation
873	A/R	Ability to access the Gift Cards Viewer
874	A/R	Ability to delete cards in the Gift Card Viewer
875	A/R	Ability to run gift card surcharge calculation utility

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Corporate Office

804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean

Bldv. Antonio L. Rodriguez #1882 Int.104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia

238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298