

Setting Up In Store Gift Cards Transcript

Before you begin using the In-Store Gift Card application, you will need to complete some simple setup.

Review of the Options ID numbers identified in the course materials is crucial along with configuring your employees Role Based security.

We will discuss how to add the appropriate Alternate Tender, some needed receipt printer adjustments, the creation of Gift Card SKUs and the addition of Gift Card Bin Ranges.

We'll start with the Options and Security section.

There are some standard gift card options and some additional options specifically created for in-store gift cards. All of these are listed in detail in the document located in the Course Materials section. Simply download and print this file to begin. Review each Options ID and set it accordingly related to your business practices.

Your 'In Store Gift Card' will be added as an Alternate Tender to your Eagle system. This just means it is another form of payment that you allow your customers to use.

Display the Options Configuration window.

In the 'Options Group' select 'Alternate Tenders' from the drop down list. A list of POS Alternate Tender Options will populate the grid.

Double click the header section to sort them by their ID number.

Your Eagle system can have up to 10 different Alternate Tender types.

You will need to determine which ones are currently NOT being used and select one to represent In Store Gift Cards.

Those with the default description 'Alt Tender' should be available.

Enter the Alternate Tender Description. Gift Card should be easy for clerks to identify.

Select 'G' for Gift Card in the Alternate Tender 'Type' option.

Choose 'Yes' in the Current Value for 'Alternate tender enabled' and 'available on Sale transactions'.

When you have updated all options, click 'Change'.

If you have multiple locations you will need to set up that alternate tender in each store.

If you use Epicor's General Ledger application, be sure to review the training on Demand course titled, 'GL Gift Card Passoff'.

You will need to set up at least one Gift Card SKU in order to sell In Store Gift Cards to your customers.

You can set up one generic SKU, such as 'GC' to sell gift cards in any denomination, or you may choose to set up multiple SKUs based on the dollar amount of the gift card.

If you want to sell gift cards in ten-dollar increments, you would set up an SKU such as GC10 for ten dollar gift cards, GC20 for twenty-dollar gift cards, and so on, up to \$250.

This setup can help track which denominations are the most popular, and it can help your clerks 'sell up' to a higher denomination.

For example, if the customer wants to buy a \$15 dollar gift card, the clerk can inform the customer that the closest denomination is a \$20 dollar gift card.

In Department Maintenance, set up a unique department for gift cards. We will use 'GC'.

If you participate in more than one gift card program, you may want to set up a separate department for each program.

In Inventory Maintenance, add the gift card SKU.

Enter the appropriate Description Department and indicate which store this SKU will be used in.

Press 'Add'.

On the Codes tab enter 'N' in the 'Tax Status', 'Keep Prices', 'Keep Stock Info' and 'Discountable' fields.

Set the 'Special Record' field to 'M' for 'Miscellaneous Item' so that the sale of a gift card is recorded as a non-merchandise sale.

Click the 'Additional Codes Flags' hyperlink, and set the 'Gift Card SKU' field to 'Y'.

Press Change to save your settings.

To add funds to an existing, valid Gift Card you will create a SKU to be used at Point of Sale.

Create a SKU number that is easy to remember, such as 'ADDFUNDS'.

Use the same Department that you created for your other Gift Card SKU or SKUS.

Press the 'Add' button.

Move to the Codes tab and enter an 'N' in the 'Tax Status', 'Keep Prices' 'Keep Stock' and 'Discountable' fields.

Set the Special Record field to 'M'.

Click the 'Additional Codes Flags' hyperlink, and set the Gift Card SKU field to 'A', 'Add Funds'.

Bin Ranges identify the number located on the back of the actual card.

This six digit prefix directs the Eagle system to process the transaction differently from a Credit Card.

If your gift cards were ordered from Epicor Business Products they will typically begin with 7777 followed by 2 other numbers.

To load the bin ranges display the Options Configuration window.

Click Misc. and the following menu displays.

Click 'Maintain Custom Card Bin Ranges' under the Transaction heading.

The 'Custom Card Bin Ranges' window displays.

The 'Bin Range ID' field should be set to 'IG'.

These Bin ranges must be sequential and must not overlap one another.

Click 'Update' to save your changes.

In Store Gift Cards give you the flexibility to incentivize participation in special promotions, reward high-volume customers, offer traceable credit for merchandise returned without a receipt and offer another popular option for gift giving.

Begin with the basic setup required in Options Configuration and Role Based Security. Set up your Alternate Tender and add the appropriate SKUs to your inventory file. Follow up by viewing the Training on Demand course 'Using In-Store Gift Cards'.

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