Setting Up and Using Gift Cards

As a retailer, you have the option to issue Gift Cards to customers to use as tender for purchases from your store.

You can also use them to issue refunds, reward customers, and provide shoppers with gift options.

This course shows how to set up gift cards and use them at point-of-sale.

Objectives

- Gift Card Setup

- Using Gift Cards

Gift Card Setup

Gift card set up begins in the Sales menu.

In the Gift Card Types screen, you can search for a specific gift card type using the following filters: Gift Card Type, Allow Reloading, and Allow Cash-Out.

By default, there are four types of gift cards available.

Local - Gift Card, Local - Merchandise Credit, Local - Promo Gift Card, and Local - Legacy Gift Card.

You control options from settings.

Enable the check boxes for the Gift Card types you want to offer.

Make a selection from one or more of the drop-down menus and choose Search.

Enable the check box for the gift card you want to define and choose Edit.

Select the Expiration Period.

If you chose one of the "X days" options, enter the number of days in the Days field.

Selecting one of these options means that the gift card expires or becomes invalid after the number of days you enter.

Enter any minimum dollar amount required to activate the gift card.

Then enter the maximum dollar amount for activation without requiring a manager override.

You can limit the use of other gift card types.

With the Allow Reloading toggle turned on, Attach Item to Add/Cash Out Funds displays.

Select a SKU for the gift card from the drop-down menu or choose Add new item to create a new one.

The SKU selected from the dropdown menu is for the gift card that you want to reload.

When you select Add New Item from the dropdown, it opens the Add New Product window which enables quick access to creating a new gift card without having to open the Products section.

For more information on this, refer to Adding Gift Card Type Products in online Help.

You can determine if gift cards can be turned in for cash and how much can be given without a manager override.

Now, select a bin range.

Gift Cards have 16 digits. The first 6 digits are referred to as the bin range.

The next 10 digits allow for 1 billion number combinations so you can order replacement cards in the same bin range.

Epicor Business Products offers both Local Gift Cards to sell to your customers and Merchandise Return Cards to use in lieu of cash back during sales returns.

An example of a typical bin range setup is 777711 for Local Gift Cards and 777722 for Merchandise Return Cards.

Make the bin range pin-enabled by selecting the range and choosing Edit.

Turn on the Pin Enabled? toggle and select OK.

Refer to the online help for additional information on adding bin ranges.

By default, all the parameters set in the GENERAL tab will be set for all stores.

If you have multliple locations, the STORES tab allows exceptions and set different parameters by store.

Select OK when you are finished.

Changes are highlighted in the grid.

Selecting Store Exceptions filters the results to stores with Gift Card exceptions.

Select Save when finished.

With the Gift Card set up, it's time to add it as a tender for point-of-sale.

From Sales > Setup, choose Tenders.

Enable the check box for the Gift Card you want.

Choose Edit.

Enable the Tender Available On Sale toggle and update other fields as required.

Choose Save.

The gift card now shows as Available on Sale.

For more information on Setting up gift cards and adding them as tenders, refer to online help.

Using Gift Cards

Once gift cards are set up, you will need to learn how to issue them, accept them as payment, and perform a few other card management functions.

In the posting screen, select the gift card SKU you wish to sell and choose Add.

When the Issue Gift Card window appears, swipe the gift card using your pin pad.

If you selected the Prompt for Price option when adding the gift card type item, you'll see the Enter Price for Item pop-up.

Enter the gift card price, add an item note if needed, and select SELL.

Continue with the transaction and complete the sale.

To accept a gift card as payment, add items as you would normally.

Select Make Payment.

In the Amount Due window, choose Gift Card.

You will be prompted for a PIN if the gift card is PIN enabled.

You can enter the number, swipe the gift card in the pin pad or scan the barcode.

Select Pay.

For payments made with gift cards, the sale receipt displays the encrypted gift card number along with the transaction amount.

You can perform several Gift Card maintenance functions in point-of-sale.

These include, checking gift card balances, adding funds, and cashing cards out.

To check a gift card balance, select the gear icon on the right panel of the point-of-sale screen and then choose GIFT CARD DETAILS.

On the gift card details window, you can swipe the gift card, scan the barcode, or enter the 16 digit gift card number and select the Go button.

Choose Balance where you can check the gift card balance, see its status, and review transaction details.

To add funds to the gift card, select the Add Funds button in the Gift Card Details window.

Enter the amount you want to add to the gift card and select OK to confirm.

If the Allow Cash Out toggle is enabled, you can cash out the gift card, select the Cash Out button in the Gift Card Details window.

Enter the amount you want to cash out and select OK.

A merchandise credit gift card is generally issued in exchange for the value of a returned item.

You can provide a gift card instead of refunding the amount in cash.

For returns without receipt, refunds are processed to a Merchandise Card by default.

Once you add the item(s) the customer wants to return, select the payment button, and you'll see the return summary screen.

Select Proceed.

Swipe the Merchandise card you're issuing and once it's verified, select OK.

Complete the transaction like you normally would.

You can reward loyalty customers with a gift card by creating a price book in Products > Pricing.

For example, you create a promotion that awards a five dollar gift card with the purchase of twenty-five dollars of regular priced merchandise.

For more information on this, refer to online help.

Recap

You have the option to issue Gift Cards to customers to use as tender for purchases from your store.

You can also use them to issue refunds, reward loyalty customers, and provide shoppers with gift options.

For more information on gift cards, refer to online help.

This course showed how to set up gift cards parameters and use them in point-of-sale.

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