User Manual

M&M V8 Multi-Store Gift Card – v1.x
For Retail Pro® v8.52 and Above

Operation at POS

## Issuing Gift Cards/Adding Value

A gift card can always be issued by using the "Issue Gift Card" button on the Receipt Tender screen side menu.

If you have allowed Gift Cards to be issued using inventory items, then cards can also be issued using the assigned item number.

The "Issue Gift Card" function is also used to add value to an existing card.

Issuing Cards From the Tender Screen

On the Receipt tender screen, click the "Issue Gift Card" button:
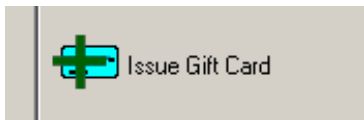
    The Issue Gift Card screen will be displayed:

Enter the amount to issue for the card. For existing cards this is the amount to add to the card value.

Enter the card number or swipe the card.

Click the OK button to continue or click Cancel to cancel the operation.

If you get the message "Gift Service Not Available" it means that the gift card service is not running at the Main or the Internet connection has been lost.

If the transaction is authorized, the tender is added to the tender screen.

Issuing Cards Using An Inventory Item

To issue gift cards using an item, create a new Receipt.

Add the item for each card you want to issue. Each item can only have a quantity if 1. Set the price of each item to the gift card value.

Go to the tender screen and tender the Receipt. Click Update or Print/Update. The Issue Gift Card dialog will be displayed for each card item that appears on the receipt. In this case, the Amount field is locked to the item price.

Redeeming Gift Cards

To redeem a Gift Card, click the Redeem Gift Card button on the Receipt Tender screen:

     The Redeem Gift Card dialog will be displayed:

The Amount is set to the untendered amount from the Receipt. This can be changed.

Enter the card number or swipe the card.

Click the Balance button to get the card balance.

Click the Redeem button to redeem the card.

If the card is valid and has sufficient balance to cover the amount, the card is authorized and the card is placed on the tender screen.

If the card has a balance but the balance is less than the amount of the transaction but the "Redeem Balance When Current Balance Is Insufficient" option has been checked in Preferences, then the existing balance is redeemed.

If you get the message "Gift Service Not Available" it means that the gift card service is not running at the Main or the Internet connection has been lost.

You may also see the messages "Invalid Card", "Card Not Active" and "Card Is Lost or Stolen".

If the card is authorized, the Gift Card tender is added to the tender screen.
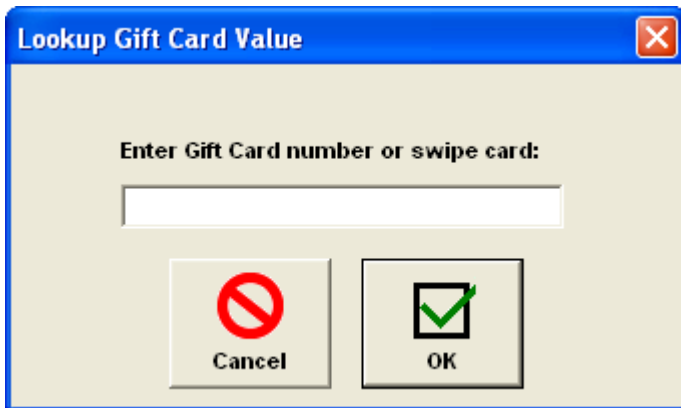
Card Balance Lookup

There are several places where you can enter a card number or swipe a card to determine the card balance and status: the Receipt List View screen, the Receipt Form View screen or the Customer List and Form View screens.

In all cases, click the "GC Value" button on the side menu:

                    The Lookup Gift Card Value screen will be displayed:

           Enter the card number or swipe the card.

Click OK to get the balance.

If the card is valid, the balance will be displayed.

If you get the message "Gift Service Not Available" it means that the gift card service is not running at the Main or the Internet connection has been lost.

You may also see the messages "Invalid Card", "Card Not Active" and "Card Is Lost or Stolen".

Gift Card Maintenance

POS>Customers

Click the GC Maint button on the Customer List View side menu to perform Gift Card maintenance.

                    The GC Maint button is only available on the Main and only available if you have security rights for Gift Card Maintenance.

The Gift Card Maintenance screen is displayed:

Displaying Gift Card Information

There are several ways to display gift card information:

By Card Number – Enter a starting card number in the "From" box and/or an ending card number in the "To" box and click By Card Number. If a "From" number is entered, all cards with a number greater than or equal to that card will be displayed. If a "To" card is entered, all cards with a number less than or equal to that card number will be displayed. If both are entered, all cards within the From/To range are displayed.

By Issue Date – Enter a starting date in the "From" box and/or an ending date in the "To" box and click By Card Number. If a "From" date is entered, all cards with an Issue Date greater than or equal to the "From" date will be displayed. If a "To" date is entered, all cards with an Issue Date less than or equal to the "To" date will be displayed. If both are entered, all cards with an Issue Date within the From/To range are displayed.

By Last Transaction Date – Enter a starting date in the "From" box and/or an ending date in the "To" box and click By Card Number. If a "From" date is entered, all cards with an Issue Date greater than or equal to the "From" date will be displayed. If a "To" date is entered, all cards with an Issue Date less than or equal to the "To" date will be displayed. If both are entered, all cards with a Last Transaction Date within the From/To range are displayed.

By Customer – If a Receipt has a Bill To Customer when a Gift Card is issued, the Bill To Customer name is stored with the card for reference purposes. To locate a card based on the original customer, click the By Customer button. This will display the "Select Customer" screen. From this screen you can locate a customer by Last Name or Company. Select a customer from this screen. Any cards that were originally issued to that customer will be displayed.

Show All – Click Show All to display all cards.

Selecting Cards

Any number of cards can be selected in the display. You can hold the Ctrl key to add or remove individual cards from the selected cards or you can hold the Shift key to select a group of sequential cards.

You can click "Select All" to select all the cards in the display.

Value Totals

The Total Original Value and Total Current Value boxes will display the total original value and total current value for the selected cards.

Gift Card Maintenance

The Gift Card Maintenance screen shows the Card Number, original customer (if applicable), the Issue Date, Last Transaction Date, Original Value, Current Value, Active Flag and Lost/Stolen Flag.

A "Y" in the Active column indicates that the card is active. "N" in this column indicates that the card has been deactivated.

A "Y" in the L/S column indicates that the card was reported as lost or stolen.

Active/Inactive

Select a single card and click the Active button to toggle the card status from Active to Inactive and back again.

Lost/Stolen

Select a single card and click the Lost/Stolen button to toggle the Lost/Stolen flag from N to Y and back again.

Deleting a Card

A single card can be completely deleted by selecting the card and clicking the "Delete" button. A verification message is displayed. Once the card is deleted, it cannot be "undeleted."

Printing the Card List

Select the cards you would like to be included in the printed report.

The list of gift cards and associated information can be printed at any time by clicking the Print button.

Exporting the Data

The Export button will generate a text file with comma-separated values for the data in the display.

Select the cards you would like to have included in the export file.

Click the Export button. The Save As File dialog will be displayed. Browse to or enter a file. The default extension is .txt.

The file will be exported.

The format is:

"CardNumber", "OrigCustomer", "IssueDate", "LastTrans", "OrigValue", "CurrValue", "Active", "Lost"

The values in the quotes are taken exactly from the display.

Importing Gift Card Data

You can use the Import button to import gift card data into the database. This is useful if you already have gift cards that have been issued or are upgrading from a previous version of the M&M Gift Card system.

The card data should be placed in a text file. Each line of the file can have one of two formats:

8 values per line:

CardNumber, IgnoredField, IssueDate, LastTransDate, OrigAmt, CurrentBalance, Active, LostStolen

Or 9 values per line:

CardNumber, IgnoredField, IssueDate, LastTransDate, OrigAmt, CurrentBalance, Active, LostStolen, Type

Note that each piece of data is separated by a comma.

The CardNumber and CurrentBalance are the only required fields. All other fields can be left blank. If the OriginalAmount field is blank, the original amount is set to zero. If the IssueDate or LastTransactionDate are blank they are set to the current system date.

If the CardNumber or CurrentBalance are missing, the line is skipped. If the OriginalAmount or CurrentBalance are not numeric values, the line is skipped. If the IssueDate or LastTransactionDate are not valid dates, the line is skipped.

If the CardNumber already exists, the line is skipped.

If there are errors while processing cards, when processing is complete, the system will display a prompt and ask if you want to print the errors. If you respond with the Yes button, the printer dialog is displayed and the errors are printed.