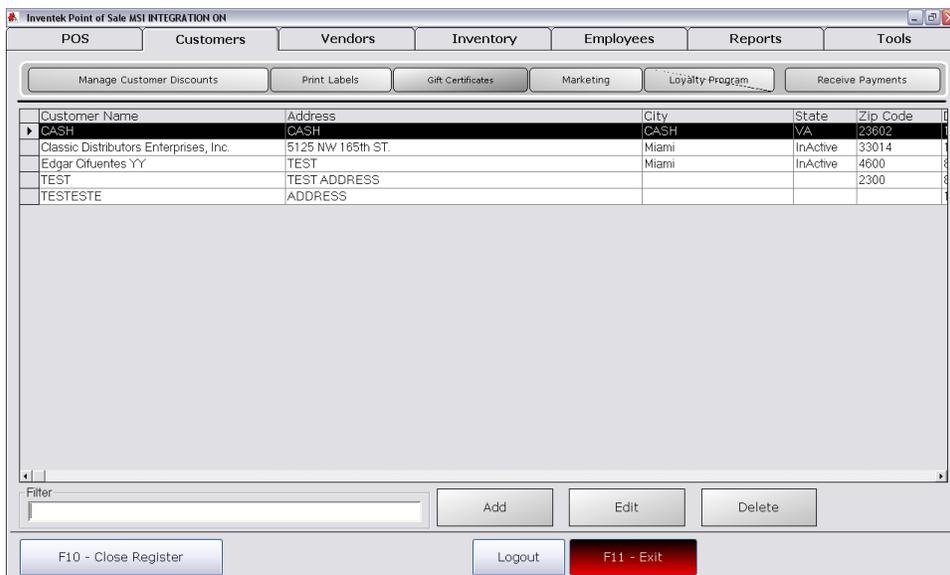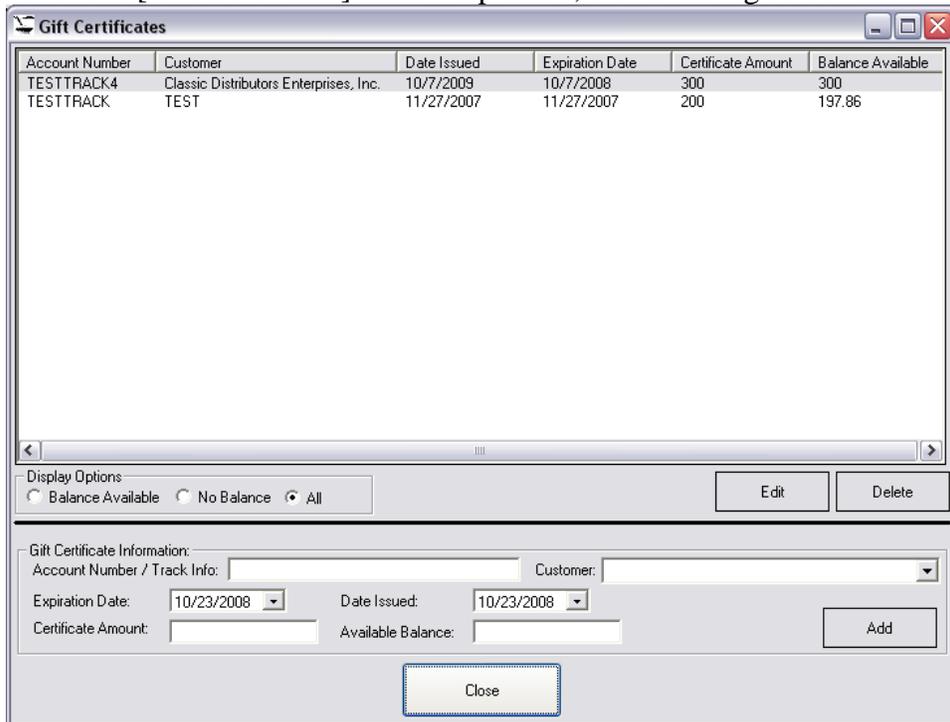# Gift Certificate Tutorial

Basic Functions:

The Inventek Point of Sale System allows for the sale and administration of gift certificates directly. To access the Gift Certificate section, click on the Customers Tab, and then click on the [Gift Certificates] button as seen below:

When the [Gift Certificate] button is pressed, the following screen will be displayed:

The fields displayed are as follows:

Account Number/Track Info: This field contains the identification of the gift certificate. This is a unique number that identifies it. If using a gift certificate from provider, use the information on the magnetic card or the barcode assigned to it.

Customer: Select the Customer from the drop down list. If the customer information is irrelevant, you may select "CASH" which is the default customer.

Expiration Date: Select the date for which you would like the gift certificate to expire on. By default, the Gift Certificate will be valid for one calendar year.

Date Issued: This is the date of issue for the gift certificate.

Certificate Amount: Enter the total amount of the gift certificate.

Balance: This is a read-only field that displays the available balance on the gift certificate.

After filling the information, click on the [Add] button to activate it. Once a gift certificate is activated, you can edit or delete it accordingly as seen in the screen above. Simply select the desired gift certificate by clicking on the list, and click on the appropriate button.

Once the Gift Certificate is activated, it may be used as a tender type though the sales procedure. The following screen will go through a mock sale to demonstrate the tendering of a gift certificate.

A transaction was performed as normal, and the [F2 Tender] button was clicked, and the Tender screen appears as seen below:

 Once the tender screen appears, click on the Gift Certificate from the Pay Type section to display the Gift Certificate option:

Swipe the gift certificate (if using a magnetic card) or scan its barcode. Once this is done, the system will verify the gift certificate. If it is valid, it will show the balance available in green, otherwise it will show an error message in red. The system will not allow you to use the certificate unless it is valid in the database. If it is valid, you will be able to click in the [Use Certificate] button as seen on the screen.

Click on the [Use Certificate] button, and this will proceed to tender the transaction. Note that the balance on the gift certificate will be adjusted to reflect what was just used on the current sale.

Click [F4 Complete] to finish the transaction and return to the main POS screen.
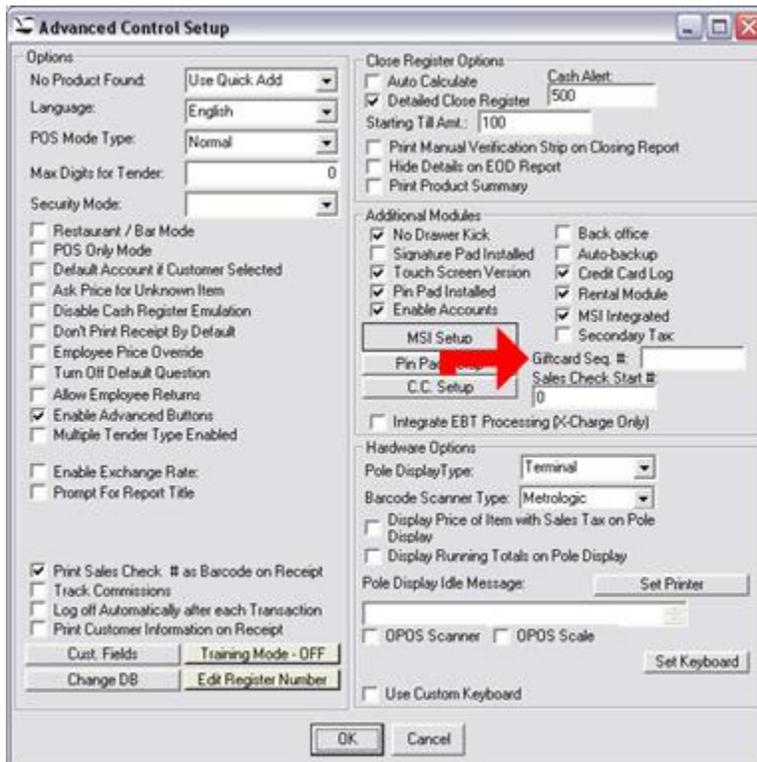
Advanced Options:

If enabled under Control Setup (see manual for settings), Multiple Tender Types can be used along with a Gift Certificate. To do so, simply use whatever tender type is required first, and then use the gift certificate for the remainder of the balance.

If a gift certificate is used as a first option, the system will use as much of the balance as possible to tender the current transaction. Meaning, if a transaction is for $20.00, and a Gift Certificate with a balance of $100.00 is used, the system will us the full $20.00 from the certificate directly. So, if a customer wants to use only $10.00 of the certificate, you must tender the other pay type prior to using the certificate.

A Gift certificate may be activated via a sale. In order to do this, you must have sequential Gift Cards. Sequential Gift Cards are those that are pre-numbered and preloaded with identification information. For example, say you purchase a batch of Gift Cards from a vender. Those cards may be numbered as follows:

AB1234001
AB1234002
AB1234003

It is VERY IMPORTANT to note that the sequence must be SIX digits. From the following sequence, the gift cards are identified by the last three digits, and the other digits represent the batch. Therefore, the Inventek Point of Sale System can be configured to identify anything scanned or swiped with the sequence of AB1234 (from the example above). To setup this sequence, click on the Tools Tab and then click on the [Control Setup] button:

To enable the sequence, enter the sequence number as indicated by the arrow in the graphic above. In our example, the sequence number would be AB1234. After Control Setup is modified, you will need to add an item to inventory with a product code of GIFTCARD, and with the option of [Prompt for Price] enabled, as depicted below:

Once that is entered, you can sell a gift card simply by swiping or scanning it as if it were a product and the system would then process and activate the card accordingly. The following screen will depict the process:

When scanned, the system will ask for the amount of the gift certificate. Simply enter the value, and click OK.

Once this is done, a transaction for the gift card is performed, and you may tender accordingly. If you chose to delete the item (gift card) from the transaction, the system will automatically eliminate it. This is done for security reasons.