

# Setting up gift cards on a WebStore

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## Payment Gateway Gift Cards

Some payment gateways enable customers to purchase gift cards (vouchers) that can later be redeemed against Webstore purchases.

To see the full list of supported payment gateway gift cards, please go to your Webstore Manager -> Orders -> Gift Cards Setup.

Depending on your region and payment gateway, some gift cards may not be available. Before enabling gift cards in WebStore Manager, we advise you to contact your payment gateway to confirm that gift cards are supported, and open a new support ticket with WebSell to confirm if payment gateway gift cards are available for your WebStore.

Before enabling payment gateway gift cards in your WSM:

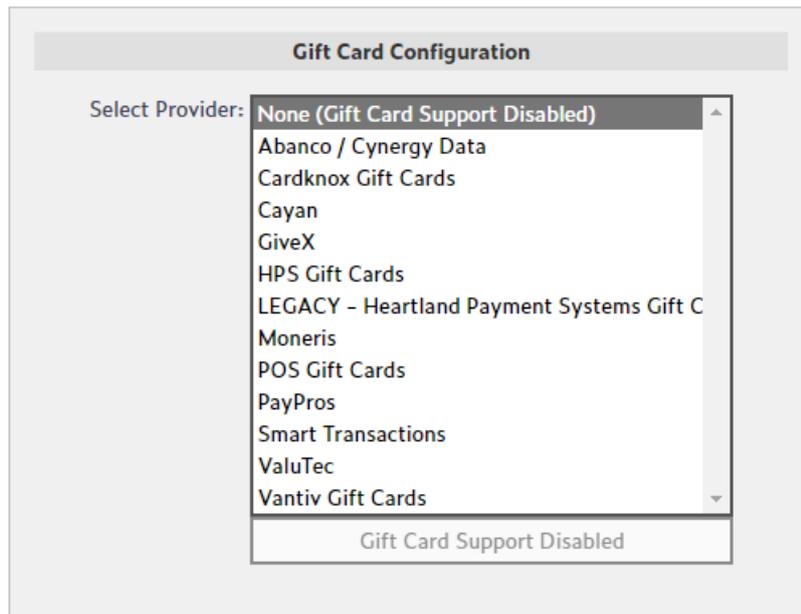
1. Create and configure a tender type in your POS Manager. For example, in RMS Store Operations Manager, you can do it by selecting Database, then Tender Types.
2. For payment gateway gift cards, create a new tender called *Online Voucher*, with a Tender Code of **OV**, and set the Tender Type to **Cash or Other**.
3. Synchronize using the latest version of WebSell Sync.

To enable the redemption of payment gateway gift cards on your WebStore, perform the following:

Open your WebStore Manager (WSM) and go to **Orders -> Gift Cards Setup**.

# Gift Card Management

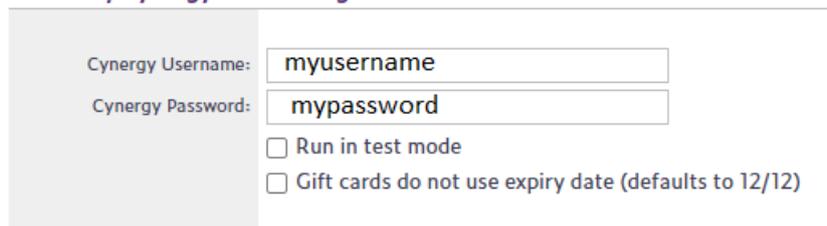
Your WebStore can be configured to support a gift card provider.



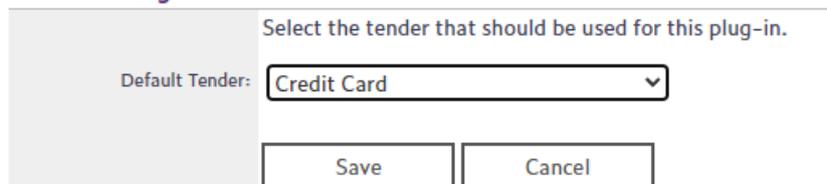
Select the desired gift card provider, then click "Activate".

## Configure Abanco / Cynergy Data

### Abanco / Cynergy Data Configuration



### Tender Configuration



On the configuration page that is displayed, specify the user name and password that was supplied to you by the gift card provider. If you wish to run in test mode only, select the "Run in test mode" checkbox.

Under **Tender Configuration**, select the default tender that should be used for this provider (in this case, Credit Card), then click Save.

When the customer clicks "Go to Checkout", the checkout page that is displayed includes the gift card section. Enter the gift card number and expiration date, as specified on the gift card, then click Continue. On the next checkout page, a message is displayed that indicates that some or all of the order amount will be deducted from the gift card (depending on the value assigned to the gift card).

If necessary, specify the mode of payment for the remaining order balance, then click "Continue" to

complete checkout.

Download the Web Order and process it as usual through the POS. You will notice that the tender window shows the appropriate value in the gift card tender field.

## POS Gift Cards

WebSell also offers redemption of POS Gift Cards for RMS/RMH users.

To set up the sale of RMS gift cards, perform the following steps:

1. Ensure that vouchers have positive expiration dates in RMS. Otherwise, when a voucher is sold at the POS, its expiration date will be set to today. To do so, select *File -> Configuration -> Tender* tab.

Enter the number of Voucher Expiration days – at least 365 days is recommended:

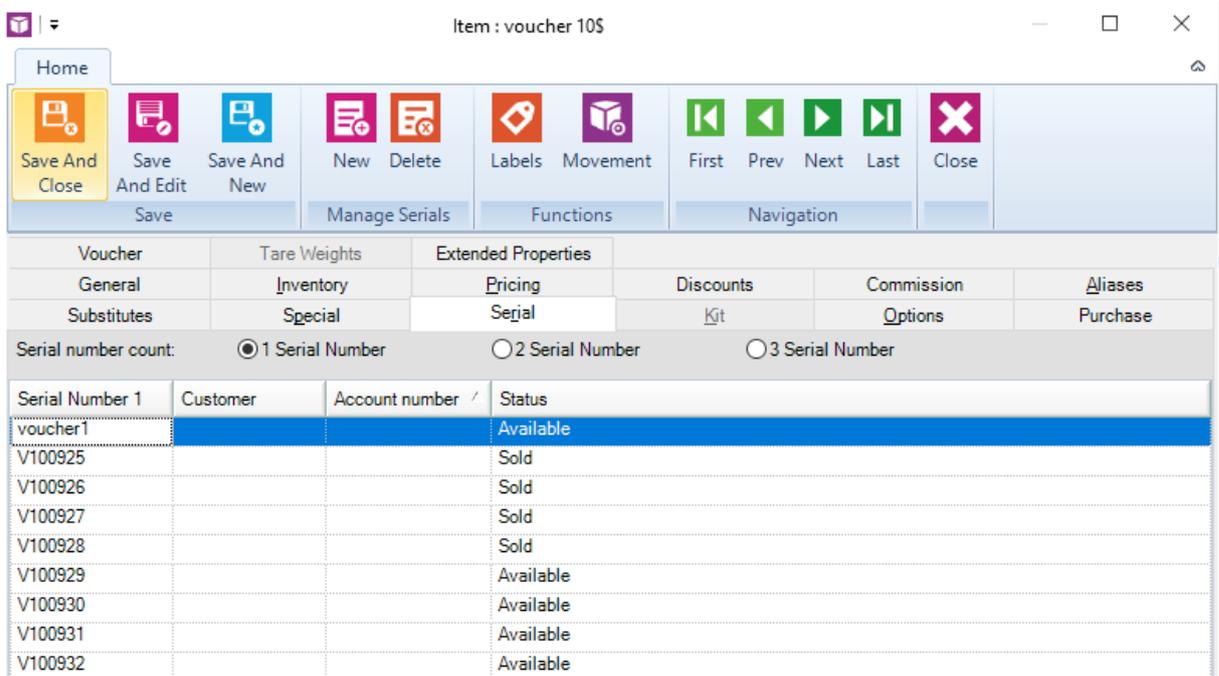
Store	Ordering rules	Inventory rules	Sales Tax	Store rules
Rounding rules	Unit of measure	Tender	GL Accounts	Multi-Store
Tender Information				
Default Change Tender:		Gift Voucher		
Voucher Expiration:		365 days		

2. Create a new matrix item in your Store Manager with a Matrix Lookup Code of **Voucher**. Set the required voucher denominations as items in the matrix, for example, as shown below:

General	Component Item	Quantity View
Matrix lookup code:	Voucher	
Description:	Voucher Gift Card	
Sub Description 1:		
Sub Description 2:		
Sub Description 3:		

Dimension 1		Dimension 2		Dimension 3					
Voucher									
Attributes	Codes	Attributes	Codes	Attributes	Codes				
Amount	10000								
*									
Component items									
Dimension 1	Dimension 2	Dimension 3	Item Lookup Code	Description	Price	Quantity	RestockLevel	Inactive	Depa
Amount	(none)	(none)	Voucher-10	10\$ Voucher	\$10.00	1000.00	0	<input type="checkbox"/>	
Amount			Voucher-20	20\$ Voucher	\$20.00	994.00	0	<input type="checkbox"/>	

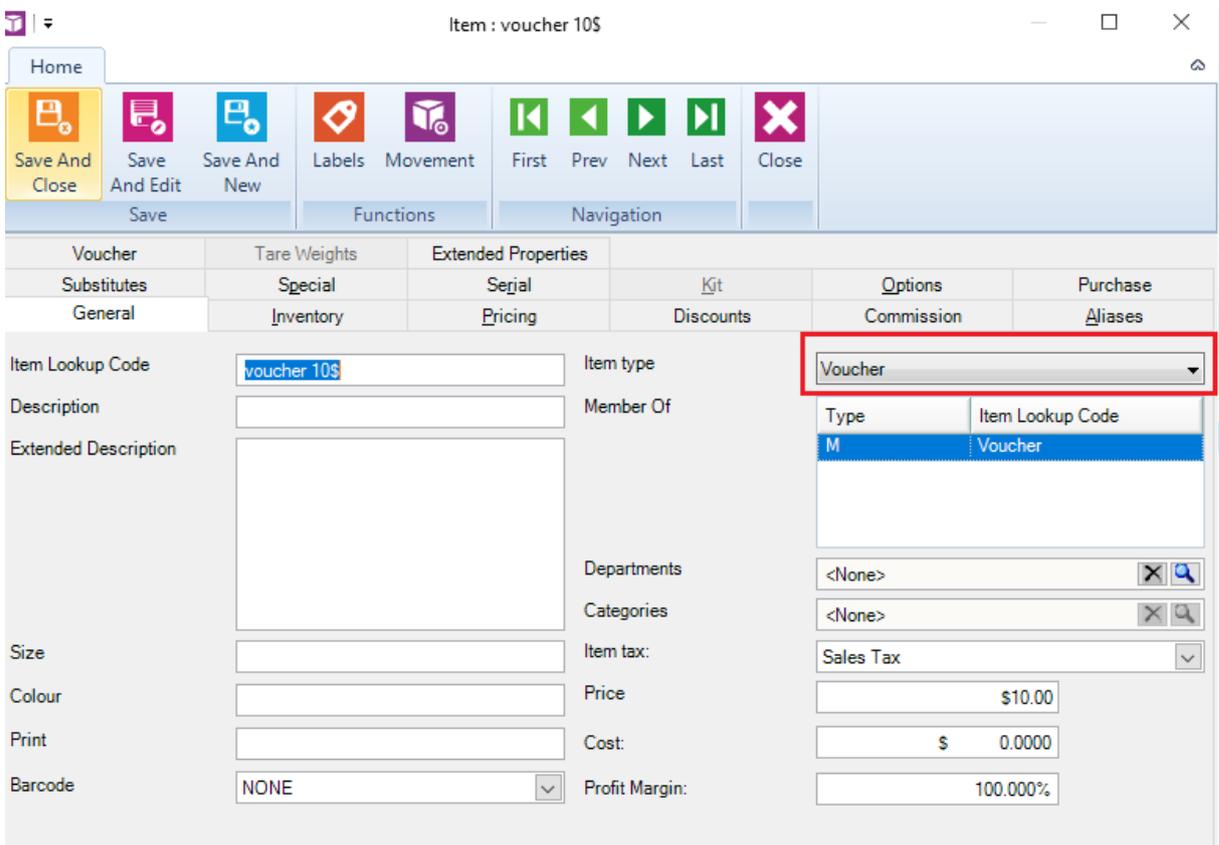
3. Click Attributes to specify the quantity of vouchers available in each denomination;
4. You should pre-populate the item with serial numbers (*Items -> search for an Item -> Serial*);



New voucher serial numbers can also be created at the point of sale where at least one serial number already exists (Sold or Available). If there are no existing serial numbers, a cashier will not have an option to create additional serial numbers. Therefore it is best practice to populate serial numbers in advance.

**Note:** Ensure that your gift card serial numbers are obscure enough to prevent people from guessing them;

5. The individual Item Type should be **Voucher**;



6. Configure a voucher/gift card tender type in RMS Store Operations Manager by selecting *Database* -

> *Tender Types.*

For RMH users: *Store Manager -> Setup -> Financial -> Tender Types*

For example, you could set up a tender type such as the following:

The screenshot shows a software window titled "Tender Type : Gift Voucher - GV1". The window has a ribbon-style top bar with a "Home" tab and several icons for "Save And Close", "Save And Edit", "Save And New", "First", "Prev", "Next", "Last", and "Close". Below the ribbon, there are two tabs: "General" and "Vouchers", with "General" selected. The main area is divided into two columns of settings. The left column, "General Settings", includes fields for "Description" (Gift Voucher), "Tender Code" (GV1), "Tender Type" (Voucher), "Currency" (Default Currency), "Tender Type is inactive" (checkbox), and "Maximum Amount" (\$0.00). There is a "Denominations..." button below the maximum amount field. The right column, "Register Settings", includes fields for "Display Order" (6), "Scan Code" (0), "Round To Value" (\$0.00), and checkboxes for "Prevent Cashier overtendering", "POP Cash Drawer" (checked), "Require signature", and "Allow multiple entries". A note at the bottom of the register settings states: "(Extra lines will be added on the tender screen when a partial amount is entered)".

**Note:** Once you have modified your tender types, you will need to perform a Z-out at each POS in order for this change to take effect.

7. Sell a voucher item at the POS or on your WebStore. You will be prompted to create a serial number, if one has not already been assigned;
8. Synchronize using the latest version of WebSell Sync;
9. Note that you will need to inform your customer (either in person or via e-mail) of the amount and serial number of the voucher that he has ordered.

## Redeeming RMS Gift Cards

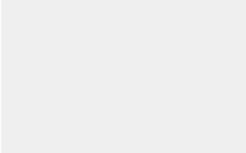
To enable the redemption of RMS gift cards on your WebStore, perform the following:

1. In WebStore Manager under *Orders*, select *Gift Card Setup*;
2. Select Dynamics POS Gift Cards, then click Activate.
3. Under Default Tender, select the default tender that should be used for this provider (in this case, Gift Voucher), then click Save:

# Configure POS Gift Cards

## POS Gift Cards Configuration

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This plugin does not have any configuration options.

Use Global Vouchers

## Tender Configuration

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Select the tender that should be used for this plug-in.

Default Tender:

Gift Voucher ▼

Save

Cancel

4. When the customer clicks Go to Checkout, the checkout page that is displayed includes the following section. Enter the gift card number, as specified on the gift card, then click Continue. On the next checkout page, a message is displayed that indicates that some or all of the order amount will be deducted from the gift card (depending on the value assigned to the gift card). If necessary, specify the mode of payment for the remaining order balance, then click Continue to complete checkout.
  5. Download the Web Order and process it as normal through the POS. You will notice that the tender window shows the appropriate value in the gift card tender field.
  6. To view voucher activity and balances, press Ctrl+Shift+F3 at the POS.
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