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Internal Gift Cards – Pro 9

"GETTING STARTED GUIDE"

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Requirements:

- CAP SellWise or CAP Cash n' Carry Pro 9.
- > A Keyboard Wedge 2 or 3 Track Card swipe. You may also use manual entry.
- > Properly formatted gift cards. Contact Sales for further information on purchasing these.

Current Limitations:

- > Internal Gift Cards cannot be used in multistore polling locations.
- Existing balances from external Gift Cards cannot be transferred to CAP internal Gift Cards.

Internal Setup/Configuration:

1. Go to **Help>Configuration>Departments** and create a Department named 'Gift Cards'. Make a note of the department code as it will be needed later on in this process. *(See example below)*

nents				
ent				
nerts				
Dept Name Sub Dept Class	Tax Code	Margin Verify Age	Up Sell Message	Printer
1.000 General	0	10		
0.000 Retail	B	10		
001.000 testsub		10		
6.001.001 testclass		10		
0.000 Party	C	10		
0.000 General2	F	10		
0 000 Liguer	-	10 21		
10.000 lotto		10		
0.000 RENTAL		10		
0.000 TEST		0		
0.000 Tobacco		10 18		
0.000 Deposit	A	10		
NOV WEINERSHIP		10		
0.000 DISCOUNT %		0		
001.000 DISCOUNT 10%	0	10		
002.000 DISCOUNT 20%	0	20		
003.000 DISCOUNT 25%	0	25		
00.000 GIFT CERTIFICATE		10		
00.000 IESI 000 000 000 000 000 000 000 000 000 0	0	10		
30.000 Grit Caro	0	10		

2. Go to the Inventory module and create a Gift Card Inventory Item. Make a note of the Stock Locator number as it will be needed later in this process. *(See example below)*

2a. Set the Current Cost and List Price to 0.00.

- 2b. Set the Tax Code as Non-Taxable.
- 2c. Link the Gift Card Department.
- 2d. From the Additional Information tab, set Non Decrementing to Yes.

Stock Locater	32.				Description	Gift Card				42
Vendor Item #	GC				Sub-Description					
		Non-Decrementing	ltem		UPC(s)			~		
Unit of Measu	ire	Ea - Each		~						
		Main		<u> </u>	Additional Info	ormation			Messages	
Cost/Price										
Current C	ost	0.00	М	argin	%	Tax Code	Non Taxable	~	Volumetric Tax \$	
Actual C	ost	0.00	Ма	rkup	%	Vendor				
List P	rice	0.00				Alt Vondor				
Sell P	rice					Alt. Velidor	Dept Code	DeptSub De	ot Clas	s
						Department	084.000.000	Gift Card		
Ordering Informa	ation						1			
- On Han	d [0	Maximum	0						
On Orde	u	0	Minimum	0						
Oty / Pag	n sk	1	Hac Sold	No						
Curre	ntly	No		9/28/2016						
Understoc	ked	 Do	Last Sold	Falco						
		Don	ot ReOrder	Faise						
Votes										
									^	Edit
										Find
									~ 	Next
		[]								

- 3. Go to Help>Configuration>Cash Drop/Check Cashing/Lottery/Layaway/Frequent Buyer/Deliveries to define the Gift Cards. (See example below)
 - 3a. Set Use Giftcards in House to Yes.
 - 3b. Enter the **Gift Card Department** code/number and press **Accept**.

Gift Cards	
Use Giftcards in House	Yes
Gift Card Department	084.000.000
Card expires	Never

4. Go to Help>Configuration>Tender Types and add a Gift Card Tender Type. (See example below)

4a. Set **EDC** set to **No**.

4b. Enter the **S/L** (Stock Locator) number for the Inventory Item you created and press **Accept**. You may choose to open the cash drawer at the end of a gift card sale as well.

🜔 Change Tender	×
Tender Type Gift Card V EDC No	
Description Gift Card ~	
Open Drawer Yes Print EDC Receipt No	
S/L 32.	
F1 Help F10 Accept Esc Cancel]

5. Exit and restart CAP Software for all changes to take effect.

Selling a Gift Card:

- Gift Cards must be purchased before you can activate or/or increment the card.
- 1. Ring up the **Gift Card** Inventory Item. You will be prompted to enter the **Dollar Amt.** of the Gift Card to be activated. The process is the same for adding money to already activated cards. *(See example below)*

CAP POS	www.capretail.co	om Wednesda	, November 30, 2016	Stat	ion 1						
I∰I PriceCheck	Quantity	🗞 🔒 Item Name				XX Hot Keys	Open Dept	Operations	S Exceptions	Tender	emarks
	Qty = 1	Valued 0	Customer					CAP -	TEST		
		Description	Enter Dollar Amount	Do	ollar Amt.	20	Accept				
			7	8	9		×				
			4	5	6		Cancel \$	10		10770	
			1	2	3		\$1	00 Exac	ct ge	LOTTO	LOTTOUT
			0	•	-	Clear		~			
					-	Cash	Check	Credit C	Card Gif	ft Card	Gift Cert
0 Item(s)		Sub Total				iii Debit	EBT	сс			
Sales Clerk	Printer ON	Тах									
		Total				Six Pack *	Single			Google	Help

 Select the appropriate Tender to complete the sale. You will then be prompted to Please Swipe Gift Card. You are able to also manually enter the gift card number if a swipe isn't available. Press Accept once entered/swiped. (See example below)



3. The transaction will finish and the Receipts will print. The first receipt is the Gift Card receipt.

Balance Inquiry:

1. Open CAP POS and select Operations. Select Gift Card. (See example below)

CAP POS	www.capretail.c	com Wedner	day, November 30, 2016	Station 1					
Price Che	ck Quantity	Name			K Hot Keys	Open Dept	Operations Exc	E Tender	perint
	Qty = 1	Valued	Customer			Configuration	n Caler Money) Idar Ca Special	ncel
Oty It	tem ID	Description	Price Total	: 		Ship To	V Internal Use	Layaway	Cash Drawer Report
				_	F) ind Transaction	Paid Out	🍅 Layaway PullUp	Drawer Count
						Suspend	Dollar Amt.	Layaway Pay <u>m</u> ent	Quote
						ind Suspended	Gift Cert	EBT	Find PickList
0 Item(s)						online Order	Gift Card	> ROA	Work Order
Salas Cla	Printer ON	Sub Total		.00		Find Recurring Inv	Cash Check	Create Token	Send files to Fintech
HELLO		Total		.00		Sind Delivery	Cash Drop		

2. Select Balance Inquiry. (See example below)



3. Please Swipe Gift Card or manually enter the Gift Card number and press Accept. (See example below)

		Ship To
		P
 PleaseSwipe	e Gift Card :	Find transaction
Accept	Esc Cancel	6
		Suspend
		Find Suspended

4. The Balance will appear on the screen. Press **OK** to print a receipt with the available balance. *(See example below)*



www.capretail.com, sales@capretail.com, support@capretail.com (800) 826-5009, Monday through Friday, 8:00am-5:30pm Central Time 7

Using a Gift Card as a Tender/Redemption:

- 1. Select/Scan the inventory items to be purchased and select the **Gift Card** tender type.
- 2. Please Swipe the Gift Card or manually enter the Gift Card number and press Accept. (See example below)



3. Press Accept to finalize the transaction. The remaining Gift Card balance will be shown on the receipt.

PriceChe	eck	Quantity	& Item	0 Name				💥 Hot Keys	Copen Dept	Operations	Exceptions	Tender	, po Remark
		Qty = 1		Valued	Custome	r			Sub Total Total Tax Total Sale Cash	5.00 .00 5.00			Accept F10
<u>Qty</u> 1	Item ID LOTTO		LOTTO		Price 5.0	Total 00 5.0	• 00		Gift Card 3 4 5 Shange Due	5.00	#91216000000	001	Cancel Esc
													GiftReceipt
											Packing L	ist 💇 🔳	Email F9
							_						Switch Printer
1 Item(s) Sales CI HELLO	lerk	Printer ON		Sub Total Tax Total		5.00 .00 5.00	0 0)						

Reporting:

 Go to the **Reports** module. Under the *Sales* section, select **Gift Cards** for a Gift Card Balance Report. This will show all Gift Cards with a balance. *(See examples below)*

Calaa		Inventory	Guatamar		0.4
Sales		Inventory Durthase Orders	Customer		Select Store
Sales Summary	0	Purchase Orders	Cust Sales Summary		0
Transaction Summary		Internal Use	Sales Detail		
Transaction Detail	0	Senai Numbers	Invoice Summary List		
Tax	0	inventory Movement	Mailing Lists		
Tender Oradii Cende	0	Inventory Turns	Customer Purchases		
Credit Cards	0	Sold Items	Layaway		Select Date Range
Gin Cards		Sales MTD and YTD	New Customers		
Cash Drawer		New Item Sales	Accounts Receivable	~ Year to Date	~ Last Year
Discounts		Last Sold Date	Price Levels	1/1/2016-12/1/2016	1/1/2015-12/31/2015
Hourly Activity		Anticipated Needs	Frequent Buyer Awards		
Sales by Department	0	Inventory Worksheet	Membership	Month to Date 12/1/2016-12/1/2016	C Last Quarter 7/1/2016-9/30/2016
Sales by Item	0	Value Analysis	Work Orders		
Sales by Vendor		Over Stock		Week to Date	C Last Month
Store Performance		Under Stock		11/27/2016-12/1/2016	11/1/2016-11/30/2016
Item Performance		Zero Sales		and the second se	- Last Week
Vendor Performance		Add/Del/Change History		C Yesterday	11/20/2016-11/26/2016
				C All 11/13/2012-11/30/2016 Se/ec	Calendar
			Employee	C All 11/13/2012-11/30/2016 Selec 12/1 /2016	Calendar t Date and Time Ranges to 12/1/2016
			Employee Sales and Commission	All 32012-11/30/2016	Calendar t Date and Time Ranges to 12/1/2016
			Employee Sales and Commission Excerbins	All 11/13/2012-11/30/2016 Select 12/1 / 2016 12:00 AM	Calendar t Date and Time Ranges to 12/1 / 2016 to 1155 FM
			Employee Sales and Commission Exceptions Parell Devictions	All 32012-11/30/2016 Select 12/ 1 /2016 12:00 AM Select Period	Calendar t Date and Time Ranges to 12/1/2016 10 10 10 10 10 10 10 10 10 10
			Employee Safes and Commission Exceptions Paroli Deductions StatP Professace	All 32012-11/30/2016 Solect 12/1 / 2016 12:00 AM Solect Period Totals One	Calendar t Dato and Time Ranges t to 12/11/2016 to 1155 (20)
			Employee Sales and Commission Exceptions Parol Debutions Staf Performance	All 32012-11/30/2016 Select 12/ 1 /2016 12:00 All Select Period Totalis Only	Calendar t Date and Time Ranges to 12/1/2016 to 11255 (24)
			Employee Sates and Commission Ecceptions Parell Decicions Staff Performance	All All 2012-11/30/2016 Select [12/1 / 2016 [12:00 AM] Select Period Totals Only (used only for Sales Performant	Calendar t Date and Time Ranges to 12/1/2016 to 11559 pa · · · ::e
			Employee Sales and Commission Exceptions Payell Deductions Staff Performance	All All 2012-11/30/2016 Select 12/1 / 2016 12:00 AM Select Period Totals Only (used only for Sales Performant	Calendar t Dato and Timo Ranges to 12/1 /2016 to 155 Ft v
			Employee Sales and Commission Excellents Pagel Deductors Staf Performance Custom Tender by Department	All 32012-11/30/2016 Select 12/1 / 2016 12:00 All Select Period Totals Only (used only for Sales Performance)	Calendar t Date and Time Ranges to 12/1 / 2016 to 1155 pt/ v te
			Employee Sales and Commission Exceptions Paged Deductions Staff Performance Custom Tender by Department Bern Sale Detail	All 11/13/2012-11/30/2016 Select 12/1 / 2016 12-00 AM Select Period Totatis Only (used only for Sales Performance)	Calendar t Date and Time Ranges to 12/1 / 2016 • • to 1155 FM • • ce)
			Employce Sales and Commission Exceptions Parell Deductions Staf Performance Custom Tender by Department Bern Sale Detail Mandoon Sales	All 32012-11/30/2016 Select 12/1 /2016 12:00 AM Select Period Totalis Only (used only for Sales Performant	Calendar t Date and Time Ranges to to
Daily Reports		Export	Employee Sales and Commission Ecceptions Parell Decidons Staff Performance Custom Tender by Department Rem Sale Detail Mandoon Sales PALLopor Reports PALLopor Reports PALLopor Reports	All All 2012-11/30/2016 Select 12/1 / 2016 12:00 AM Select Period Totals Only (used only for Sales Performance)	Calendar ■ Date and Time Ranges ■ To 12/11/2016 • • ■ To 100 P21 • • =:e)
Daily Reports Japhs Veatr/Comparison		Export Excel	Employee Sales and Commission Exceptions Payotil Deductions Stuff Performance Custom Tender by Dapartment Rem Sale Detail Mandown Sales PALiquer Reports Cost Center Sales	All 11/13/2012-11/30/2016 Select 12/1 / 2016 12:00 AM Select Period Totals Only (used only for Sales Performance) Help	Calendar 1 Dato and Timo Ranges 1 To 12/1 / 2016 10 1155 551 ~ ~ 20 10 1155 551 ~ ~
Daily Reports Sraphs Yearly Comparison Profit Pedermance		Export Excel	Employee Sales and Commission Decelons Paroll Decidons Stuff Performance Custom Rend Sale Detail Mandoon Sales PALloor Reports Cost Center Sales Department-RAdity Summary	All 22/11/202016 Select 12/17/2016 12:00 All Select Period Totals Only (used only for Sales Performant Help	Calendar t Date and Time Ranges to 12/17/2016 to 115/5/5/1 co co co to 15/5/5/20 co co co co co co co co co co
Dailv Reports Sraphs Vealy Comparison Profil Petermance Citer Petermance		Export Excel Summary Export	Employee Sales and Commission Exceptions Parell Devictions Stall Performance Custom Tender by Department item Sale Detail Mardoom Sales PALLuox Reports Cost Center Sales Department Adding Summary	All 11/13/2012-11/30/2016 12/1 / 2016 12:00 AM Select Period Totals Only (used only for Sales Performance Help	Calendar 1 Date and Time Ranges 10 12/11/2016 10 1100 Pal col

	CAI Gift Card B From 2/3/2	P - TE ST alances Report 017 To 2/3/2017		
Card Number	Date Sold	Invoice	Description	Balance
9121600000001	09/28/2016	G	ift Card	86.00
91216000000001	11/30/2016	G	ift Card	2.50
		T	OTAL	88.50

2. If you want to see the history of a specific card, enter the card number in the text box at the bottom left of the screen and press **Show Transactions**. *(See examples below)*



2a. The Gift Card activity will show the dates purchased with the amounts and invoice numbers. (See example below)

Cit Card	2	Date	Asting	Transaction	Amount Dala	
GIR Gard		Date	Action	transaction	Amount	nce
	91216000000001	11/30/2016	Purchase	0001431	-5.00	-5.00
	91216000000001	11/30/2016	Purchase	0001432	-2.50	-7.50
	91216000000001	11/30/2016	Purchase	0001433	-3.00	-10.50
	91216000000001	11/30/2016	Purchase	0001439	-2.00	-12.50
	91216000000001	12/01/2016	Purchase	0001449	-5.00	-17.50

2b. You can double click the **Transaction** number to see a summary of the selected transaction.

- 3. Other reports that show gift card information in the Reports module are: Sales Summary, Tender Detail, Tender Summary, and Credit Cards.
- 4. Gift Card information can also be exported to Quick Books.