



## Internal Gift Cards – Pro 9

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*“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)*



Code	Dept Name	Sub Dept	Class	Tax Code	Margin	Verify Age	Up Sell Message	Printer
001.000.000	Children				10			
065.000.000	TOYS			A	10			
068.000.000	Retail			B	10			
068.001.000		testsub			10			
068.001.001			testclass		10			
070.000.000	Party			C	10			
071.000.000	General2			D	10			
072.000.000	testme			E	10			
073.000.000	Liquor				10	21		
074.000.000	lotto				10			
075.000.000	RENTAL				10			
076.000.000	TEST				0			
077.000.000	Tobacco				10	18		
078.000.000	Deposit			A	10			
079.000.000	Membership				10			
080.000.000	DISCOUNT \$				10			
081.000.000	DISCOUNT %				0			
081.001.000		DISCOUNT 10%		0	10			
081.002.000		DISCOUNT 20%		0	20			
081.003.000		DISCOUNT 25%		0	25			
082.000.000	GIFT CERTIFICATE				10			
083.000.000	TEST				10			
084.000.000	Gift Card			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.**

The screenshot shows the 'Inventory - 466 Records' window. At the top, the 'Stock Locator' is set to '32.' and the 'Vendor Item #' is 'GC'. The 'Description' is 'Gift Card' and the 'Unit of Measure' is 'Ea - Each'. The 'Non-Decrementing Item' checkbox is checked. The 'Main' tab is active, showing 'Cost/Price' fields: Current Cost (0.00), Actual Cost (0.00), List Price (0.00), and Sell Price. The 'Additional Information' tab is also visible, showing 'Tax Code' set to 'Non Taxable' and 'Department' set to '084.000.000 Gift Card'. The 'Ordering Information' section shows 'On Hand' (0), 'On Order' (0), 'Qty / Pack' (1), and 'Currently Understocked' (No). The 'Notes' section is empty. At the bottom, there are buttons for 'Help', 'Add', 'Change', 'Delete', 'History', 'Print Tag', 'Accept', and 'Cancel'.

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.

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)

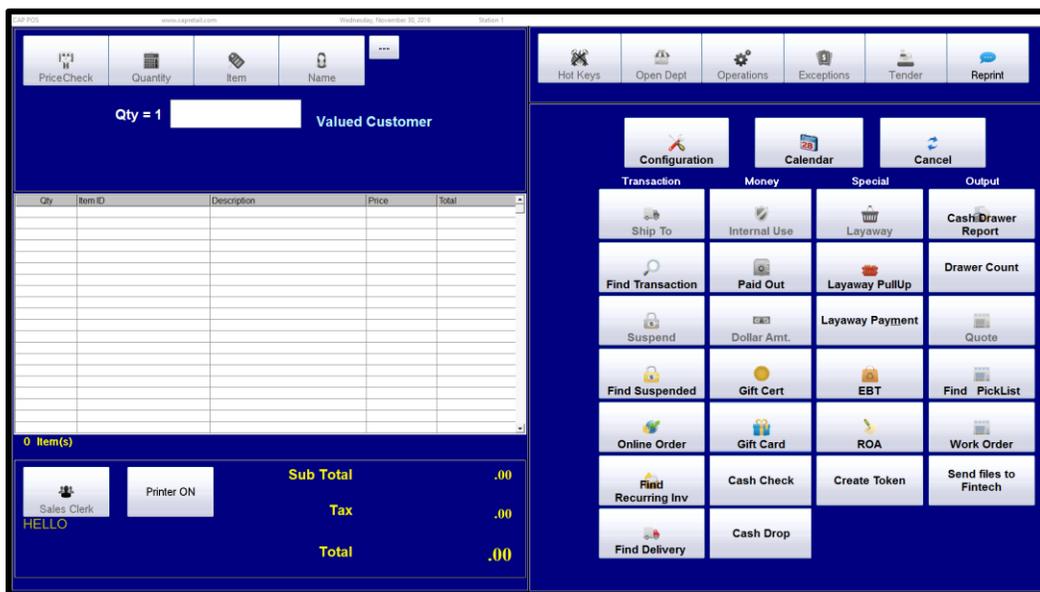
- Select the appropriate **Tender** to complete the sale. You will then be prompted to **Please Swipe Gift Card**. You are able to also manually enter the gift card number if a swipe isn't available. Press **Accept** once entered/swiped. (See example below)



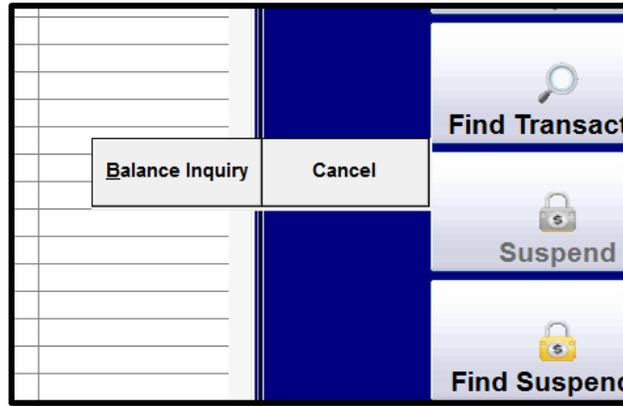
- The transaction will finish and the Receipts will print. The first receipt is the Gift Card receipt.

## Balance Inquiry:

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



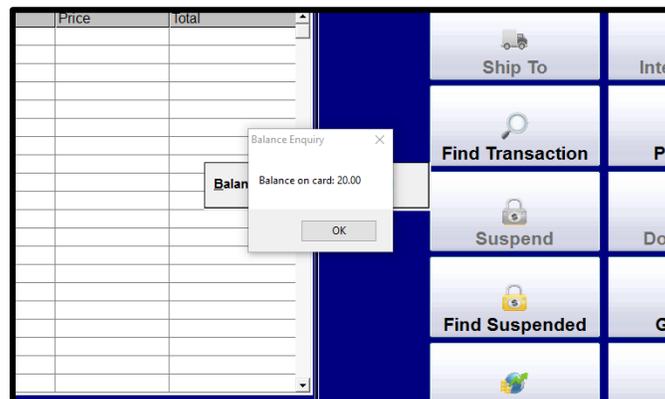
2. Select **Balance Inquiry**. (See example below)



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



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



## 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)

The screenshot shows the POS interface with a transaction for 1 LOTTO item priced at 5.00. The tender selection screen is active, showing options for Cash, Check, Credit Card, Gift Card, and Gift Certificate. The Gift Card option is selected.

Qty	Item ID	Description	Price	Total
1	LOTTO	LOTTO	5.00	5.00

Sub Total	5.00
Total Tax	.00
Total Sale	5.00
Cash	
2	
3	
4	
5	
Amount Due	5.00

Please Swipe Gift Card : #1216000000001

Select Tender

\$1 I	\$5 V	\$10 X	Exact Change
\$20 T	\$50 L	\$100 C	

Tender Selection: Cash 1, Check 2, Credit Crd 3, Gift Card 4, Gift Cert 5, Debit 6, EBT 7, CC 8

Summary:

Sub Total	5.00
Tax	.00
Total	5.00

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

The screenshot shows the transaction completed. The tender selection screen is now showing the Gift Card tender with a balance of 5.00 and the card number #1216000000001. The 'Accept' button is highlighted with a green checkmark.

Qty	Item ID	Description	Price	Total
1	LOTTO	LOTTO	5.00	5.00

Sub Total	5.00
Total Tax	.00
Total Sale	5.00
Cash	
3	
4	
5	
Change Due	.00

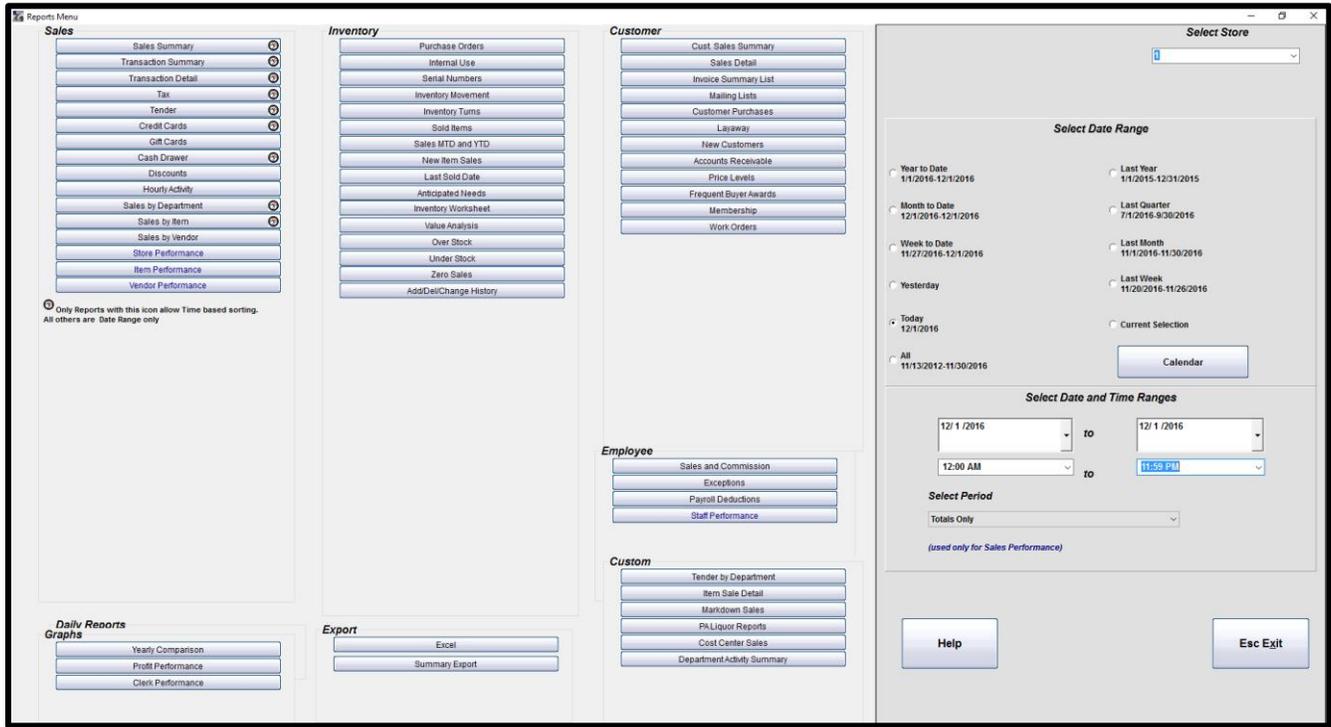
Gift Card 5.00 #1216000000001

Summary:

Sub Total	5.00
Tax	.00
Total	5.00

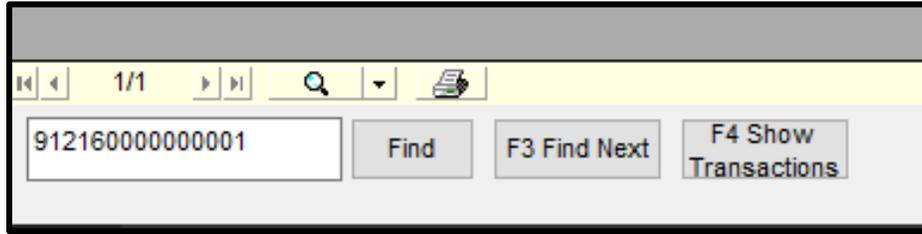
## Reporting:

- 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)*



CAP - TEST				
Gift Card Balances Report				
From 2/3/2017 To 2/3/2017				
Card Number	Date Sold	Invoice	Description	Balance
91216000000001	09/28/2016		Gift Card	86.00
912160000000001	11/30/2016		Gift Card	2.50
			TOTAL	88.50

- 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)

Gift Card	Date	Action	Transaction	Amount	Balance
912160000000001	11/30/2016	Purchase	0001431	-5.00	-5.00
912160000000001	11/30/2016	Purchase	0001432	-2.50	-7.50
912160000000001	11/30/2016	Purchase	0001433	-3.00	-10.50
912160000000001	11/30/2016	Purchase	0001439	-2.00	-12.50
912160000000001	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.

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