

# eZee POS

# Gift Card Module Manual



## *Gift Voucher*

*From* \_\_\_\_\_

*To* \_\_\_\_\_

*Amount* \_\_\_\_\_



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## Gift Card / Loyalty Card/ Membership Card/ Prepaid Card/ Vouchers



In retailing, a loyalty card, membership card, gift card, prepaid card, or club card is a plastic or paper card, visually similar to a credit card or debit card that identifies the card holder as a member in a loyalty program. Loyalty cards are a system of the loyalty business model.

Loyalty programs are structured marketing efforts that reward, and therefore encourage, loyal buying behavior — behavior which is potentially of beneficial to the firm.

Loyalty programs are called and known with a variety of names around the globe but they have to offer almost the same benefits to the end user and the company offering them. Cards typically have a barcode or magnetic strip that can be easily scanned.

A retail establishment or a retail group may issue a loyalty card to a consumer who can then use it as a form of identification when dealing with that retailer. By presenting the card, the purchaser is typically entitled to either a discount on the current purchase, or an allotment of points that can be used for future purchases.

The 4 types of cards you can maintain using this Gift Card/Voucher module are-

1. Loyalty Card
2. Membership Card
3. Gift Card
4. Prepaid Card

All these cards have different use and can be maintained using this module to service your customers in a better way. This module allows you to offer more and better deals to your loyal customers which will make them feel special and ultimately results in higher sale in your outlet.

To efficiently use this module, it is divided into 2 stages; Templates and Cards. This means that for using any of the above mentioned card type, you need to first create its template and then use the template to load the features of the card accordingly. The templates and the card configuration is same for all the types of the cards available. So we will take and in depth look into the configuration of the template and the card which shall cover all your doubts and queries.

### ***Template***

#### **New Template**

User can select this option if the user wants to create a template for any type of the above mentioned cards.

**Activate on creation:** User can check this option, if the user wants to have the template activated as we finish saving the template.

**Alias:** Alias can be termed as a short name to refer the main item.

**Sort Key:** Here user defines the sorting order of the template.

**Name:** Here user defines the name of the template.

**Card Type:** Here user defines the card type of the template. Card type is selected as loyalty card and cannot be modified.

**Template Validity:** Here user defines the number of days the template will be valid for.

**Max. No. of Supplements:** Here user defines the maximum number of supplements.

**Transaction Account:** Here user defines the account that will hold the details of the transaction. The list of account can also be maintained by using the option account under the configuration menu tab.

## Optional Template Info Tab.

### Enrollment Information block

**Enroll Fees:** Here user defines the enrollment fees that are required to create a template.

**Income A/C:** Here user defines the account that will hold the details of the income. The list of account can also be maintained by using the option misc. sales under the configuration menu tab.

### Other Information block

**Unclaimed Income A/C:** Here user defines the account that will hold the details of the unclaimed income. The list of account can also be maintained by using the option misc. sales under the configuration menu tab.

**Allow Credit:** User can check this option, if the user wants to have the credit option to be enabled for the card.

**Credit Limit:** User can check this option, if the user wants to define the credit limit for the card.

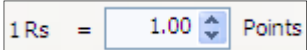
**Max Point Redemption:** User can check this option, if the user wants to define the maximum points that can be redeemed by the card.

**Min Point Redemption:** User can check this option, if the user wants to define the minimum points that can be redeemed by the card.

### Validity and Point Price:

**Point Validity:** User can define the duration in days for the point to be kept valid.

**Item Validity:** User can define the duration in days for the item to be kept valid.

 : User can define the point calculation based on one time swipe of the card.

### Benefits block

**Discount %:** Enter the percentage of discount that you want to give when the card is swiped once.

**Apply Discount Amount on Next Bill:** Check mark this option if you want to set the rule that the discount amount set should be applied every time on the next bill.

**Calculate Reward logic on Redemption:** This option is activated only if you check mark the above option. On activating this, the reward logic will be calculated on redemption of points accumulated.

### Benefits on Enrollment:

**Points:** User can define the point calculation that needs to be given when the card is enrolled.

**Item:** User can define the item that will be given out as complimentary or on discounted rates when the card is enrolled.

**Benefits on First Purchase:**

The same logic will apply to the options “Points” and “Items” except for the fact that now they will be offered on the first purchase done using the issued card.

**Reward Logic Tab.**

Optional Template Info **Reward Logic**

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**On**

Condition: Purchase | Condition Value: 1 | Outlet: Select | Condition Item: | Unit:

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**Get**

Reward: Point(s) | Reward Value: 10.00 | Outlet: Select | Reward Item: | Unit:

**For example:** On Purchase Of 1000 Get 100 Points

[Add](#) [Update](#) [Delete](#)

Condition Value	Condition	Reward Value	Reward
1	Purchase	10	Point(s)

The reward logic screen is as shown in the above screen shot. You have 2 blocks to configure the reward logic – “ON” & “GET”. The “ON” part is the condition that you decide which can be – Purchase, Purchase of item or Reward on Every Amount as shown below.

**On**

Condition: Purchase | Condition Value: 1 | Outlet: Select | Condition Item: | Unit:

Purchase  
Purchase of Item  
Reward on Every Amount

The “GET” part is the reward that can be configured as per the settings set in the condition.

According to the above screen shot, you can either reward the card holder with the items that you sell against the accumulation of the points or you can reward him with the points.

You will have to set the 'Condition Value' and 'Reward Value' as per your preference. The fields for reward items could be selected when you select the related condition or reward criteria.

When you are done setting the above criteria, you need to click on ADD button.

To update the existing criteria, click on UPDATE button.

To delete the existing criteria, click on DELETE button.

You can add multiple conditions and rewards as per your wish.

## Template List

You can select this option if the user wants to view the list of template available in the system. You can perform actions like – creating new template, edit the existing ones, deleting and deactivating the templates using this window.

You also are provided with search criteria for searching template with the name you have given to the templates.

## Cards

### New Card

User can select this option if the user wants to create a new card. Let us see the fields that you need to fill in to register/create a new card.

**Card Number:** Here user defines the card number of the loyalty card.

**Card Template:** Here user defines the card template to be used for the loyalty card.

**Is Supplement Card:** If the user wants to define the card as a supplement (secondary) loyalty card, User can check this option.

**Primary Card No.:** Here user defines the card number of the main card holder on which supplement loyalty card is issued.

**Issue Date:** Here user defines the date on which the loyalty card is issued.



**Activation Date:** Here user defines the date on which the loyalty card gets activated.

**Expiry Date:** Here user defines the date on which the loyalty card gets expired.

**Reset:** User can select this option if the user wants the date on which the loyalty card gets expired to be reset.

**Enroll Fees:** Here user defines the enrollment fees for the loyalty.

## Owner Information Tab

Details of the guest who owns the card need to be entered here. Details cannot be entered directly in the fields user will need to create a guest by clicking  or can pick details of a guest by clicking . Details to be entered when adding a guest are alias, guest code, guest first name, last name, gender, birth date, phone home and office, email, image and remarks. User has to enter address information of both home and office. Details for address are address1, address2, city, state, zip and country.

## Card Transactions Tab

Details related to the transactions done by the card are shown.

### New Button

**Add Points:** Here user defines the count of points that needs to be added.

**Recharge Card:** Here user defines the amount that needs to be added.

**Void:** Void the payment you have taken using this option

**Preview:** Preview the payment receipt using this option for the payment you have taken on this card.

**Print:** Print the payment receipt using this option for the payment you have taken on this card.

### Void Button

Here user can make a selection if a transaction related to adding of points or amount needs to be removed which was added by mistake.

## Card Transaction Summary Tab

Details related to the card are shown. Details are divided in three main categories. **Point summary** gives details of credit, debit and balance point left with the card. **Balance summary** gives details of credit, debit and balance amount left with the card. **Other summary** gives details of Last card blocked date, date on which card was deactivated and credit limit of the card. Below that there is an option which gives the status of the card.

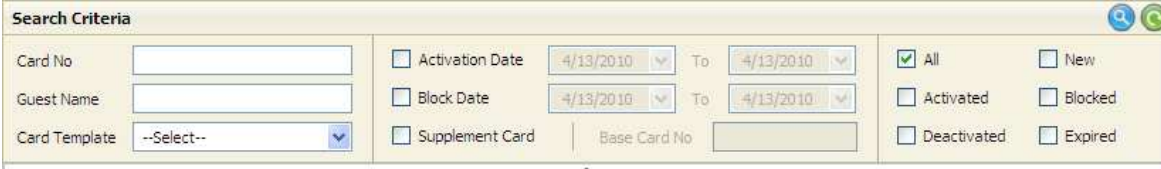
## Additional Card Tab

This tab handles the list of additional cards issued under this card. You can enter the card number and the card holders first and last name for record purpose.

## Card List

User can select this option if the user wants to view the list of cards available in the system.

### Search Criteria



Search Criteria					
Card No	<input type="text"/>	<input type="checkbox"/> Activation Date	4/13/2010	To	4/13/2010
Guest Name	<input type="text"/>	<input type="checkbox"/> Block Date	4/13/2010	To	4/13/2010
Card Template	--Select--	<input type="checkbox"/> Supplement Card	Base Card No <input type="text"/>		
		<input checked="" type="checkbox"/> All	<input type="checkbox"/> New		
		<input type="checkbox"/> Activated	<input type="checkbox"/> Blocked		
		<input type="checkbox"/> Deactivated	<input type="checkbox"/> Expired		

The top panel allows user to do a search to find the desired card from the list.

**Card No:** If the user wants to search card on the card no then user can select this option.

**Guest Name:** If the user wants to search card by first name then user can select this option.

**Card Template:** If the user wants to search card by card template then user can select this option.

**Activation Date/to date:** If the user wants to search card by range of date when the card was activated then user can select this option.

**Block Date/to date:** If the user wants to search card by range of date when the card was blocked then user can select this option.

**Supplement Card:** If the user wants to search card which is a supplement card then user can select this option. User needs to provide the number for base card also.

**Base Card No.:** If the user wants to search card which is a supplement card then user can enter the details for the base card and select this option.

**All:** If the user wants to view all card user can select this option.

**Activated:** If the user wants to view all activated card user can select this option.

**Deactivated:** If the user wants to view all de-activated card user can select this option.

**New:** If the user wants to view all new card user can select this option.

**Blocked:** If the user wants to view all blocked card user can select this option.

**Expired:** If the user wants to view all expired card user can select this option.

**Cards with un-posted balance (unclaimed balance):** This option allows user to view cards that have un-posted balance.

**Post unclaimed balance:** This option allows user to post unclaimed balance to the cards.

#### **Transaction Button**

**Activate:** This option allows user to activate the selected card.

**Deactivate:** This option allows user to de activate the selected card.

**Issue:** This option allows user to issue the selected card.

**Extend Day(s):** This option allows user to extend days of the selected card.

**Block:** This option allows user to block the selected card.

**Unblock:** This option allows user to unblock the selected card.

**Recharge:** This option allows user to recharge the selected card.

**Add Points:** This option allows user to add points to the selected card.

**New** option allows user to create a new card.

**Edit** option allows user to modify details of a previously created card. All the options are same as creating a new card.

**Void** option allows user to delete a previously created card.

### ***Membership Card***

Template and card options are same as loyalty card. While creating a new card the card type for this will be membership card all other options will be same.



### ***Gift Card***

Template and card options are same as loyalty card. While creating a new card the card type for this will be gift card all other options will be same.

### ***Prepaid Card***

Template and card options are same as loyalty card. While creating a new card the card type for this will be prepaid card all other options will be same.



### ***Add Points***

User gets a screen where user can search a card by clicking  or user can swipe a card by using  option. User can enter the details of the points that need to be added to the card.

**Card Information Tab:** User can view the details of the card owner based on the card number selected.

**Card Reward Tab:** User can view the details of the card reward points for the card based on the card number selected.

### ***Recharge Card***

User gets a screen where user can search a card by clicking  or user can swipe a card by using  option. User can enter the details of the amount that need to be added to the card.

**Card Information Tab:** User can view the details of the card owner based on the card number selected.

**Card Reward Tab:** User can view the details of the card reward points for the card based on the card number selected.

### ***Bulk Card Wizard***

This wizard helps you to create and assign cards for the guests in bulk.

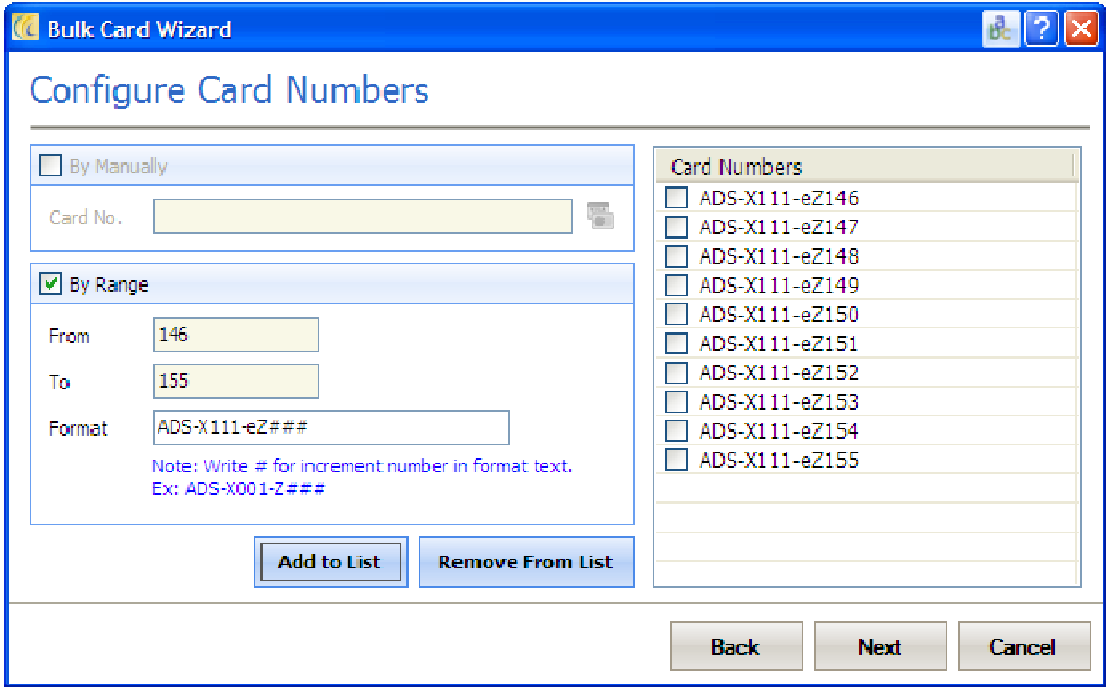
#### Step 1: Select Card Type

You simply need to start by selecting Card Type and the Card Template that you want to enroll the guests in.

#### Step 2: Configure Card Numbers

The 2<sup>nd</sup> step will ask you to enter the card number to be assigned to the cards that you are issuing. There are 2 options here to enter the card number. Manual card number entry or Card number assigned in a range. Manual card number is as simple as it can be. The 'By Range' option can be done as shown in the below screen shot.

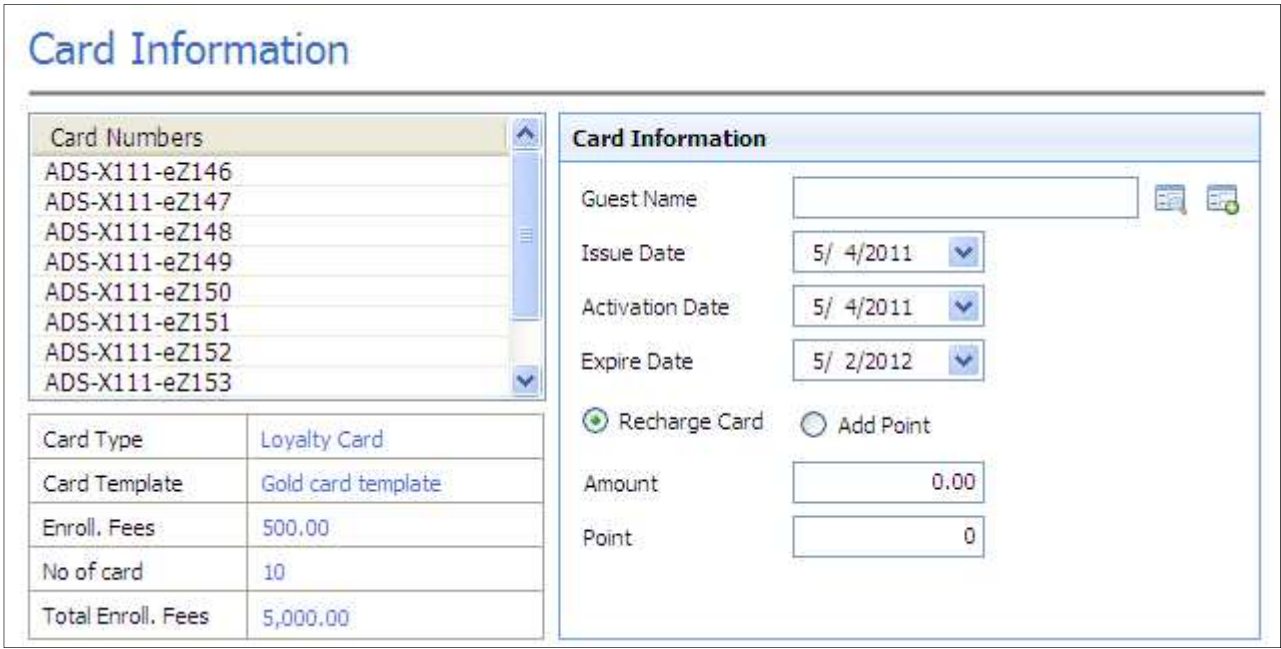




The 'Bulk Card Wizard' window is titled 'Configure Card Numbers'. It has two main sections: 'By Manually' and 'By Range'. The 'By Range' section is selected. It contains fields for 'From' (146), 'To' (155), and 'Format' (ADS-X111-eZ###). A note below the format field says: 'Note: Write # for increment number in format text. Ex: ADS-X001-Z###'. To the right is a list of 'Card Numbers' from ADS-X111-eZ146 to ADS-X111-eZ155, each with a checkbox. At the bottom are 'Add to List' and 'Remove From List' buttons. The main window has 'Back', 'Next', and 'Cancel' buttons.

- You need to enter the start sequence in the **From** field;
- Enter the end sequence in the **To** field;
- Enter the format that you follow for your cards in the **Format** field;
- Click on **Add to List** to generate the card numbers.
- To remove/delete the card numbers generated, select the card numbers and click on **Remove from List**.

Step 3: Card Information



The 'Card Information' window shows a list of 'Card Numbers' on the left and a 'Card Information' form on the right. The list includes ADS-X111-eZ146 through ADS-X111-eZ153. Below the list is a table with card details:

Card Type	Loyalty Card
Card Template	Gold card template
Enroll. Fees	500.00
No of card	10
Total Enroll. Fees	5,000.00

The 'Card Information' form has the following fields:

- Guest Name: [Text Field]
- Issue Date: 5/ 4/2011 [Dropdown]
- Activation Date: 5/ 4/2011 [Dropdown]
- Expire Date: 5/ 2/2012 [Dropdown]
- Recharge Card (Selected) / Add Point (Unselected)
- Amount: 0.00 [Text Field]
- Point: 0 [Text Field]

Select the guest name to which you want to issue the card, along with the issue date, activation date, expire date and the option to recharge the card or to add points.

**Step 4: Payment Information**

This screen will give you to the option to take payments for the cards you just created or added points to. Select the payment type and proceed further.

**Bulk Card Wizard**

### Payment Information

<b>Total Enroll Fees</b>	500.00
<b>Total Points</b>	00.00
<b>Total Recharge Amount</b>	0.00

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Total Payable:

Payment Type:  (dropdown menu open)

- Select Settlement Type
- Cash
- Check
- Visa
- Master Card
- Discover
- American Express
- ATM Card

Buttons: Back, Next, Cancel

**Set 5: Confirmation of the cards generated.**

The next window shows you the card numbers generated through this process for confirmation purpose.

***Import Card***

Use this option to import the card & member details that you have in an ms excel sheet or CSV file format.

1. First of all, you can click on the “get file format” button and save the file format that you need to import the data in.
2. Copy paste the details that you have in the file format
3. Once the file format is ready, click on the select file option to select the file that is in the correct file format with all the card details >> select the card type >> card template and proceed to the next step.
4. The next step will guide you to map the fields of the file with that of the card module. You can click on **auto map**. This will automatically map all the fields, and you can proceed to the next step.
5. The next step will show you the total entries imported with the success and error entry counts.
6. Click on Finish to complete the procedure of importing the card details.

***Thank You***