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User Guide

Installation

Step 1:

Locate and open the installation program. Double- click the icon to begin installation.



Step 2:

Please review the welcome screen and perform any recommended tasks.

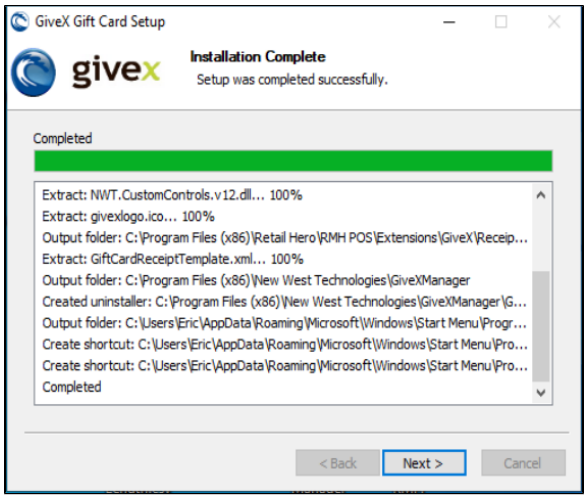
Click **Next** to continue.



Step 3:

The installation is complete.

Click Next to continue.



Step 4:

Click Finish to complete the installation process.

If the Run Configuration checkbox is checked when you click Finish then the GiveX Configuration application will open immediately after the installer closes.


GiveX Gift Card Setup
RMH
Gift Card
Integration
Completing GiveX Gift Card Setup
GiveX Gift Card has been installed successfully!
Click Finish to close the wizard
Run Configuration
givex
< Back
Finish
Cancel

Configuration

Step 1:

Locate the icon on your desktop labeled GiveX Manager. Right click the icon and select Open to begin the configuration process.



Step 2:

The GiveX Configuration Management window is split into three sections:

- **General**
- **Gift**
- **Install Options**



General:

The General tab will already have the default Card Provider, URL and Port information. However, you will need to enter the **User Name** and **Password**. This information should be provided by GiveX.

Step 3:



Gift:

The Gift tab is where you specify which Item Lookup Codes and Tenders you will be using with the GiveX for RMH application. You can choose to use the default values, but the values seen here in this tab must match the actual Item Lookup Codes and Tenders you wish to use in your RMH Store Database.

- **Reload Item Lookup Code:** Enter the Item Lookup Code to be used for reloading value onto an already activated gift card.
- **Activate Item Lookup Code:** Enter the Item Lookup Code to be used when activating a gift card.
- **Gift Tender Description for Redeeming:** Enter the tender description for the tender you wish to use when redeeming value on a gift card.
- **Gift Tender Description for Returns (Optional):** Enter the tender description for the tender you wish to use when performing returns with a gift card. This tender is optional.

Important: If this software is deployed in an Central environment, it is recommended to manage item and tender changes from Central and push the item changes to the stores.

- **Use ILC prefix for activation:** Check this option to use a specific Item Lookup Code for an item that will prompt for card activation during a transaction tender process. This would bypass using the Activation button in the Gift Card Console. If enabled, you must enter the prefix or beginning of the item so GiveX knows which item will prompt this activation function. The Default is Giftcard. So if any item started with Giftcard then it would be applied. Disable this option if you prefer to use the Gift Card Console.

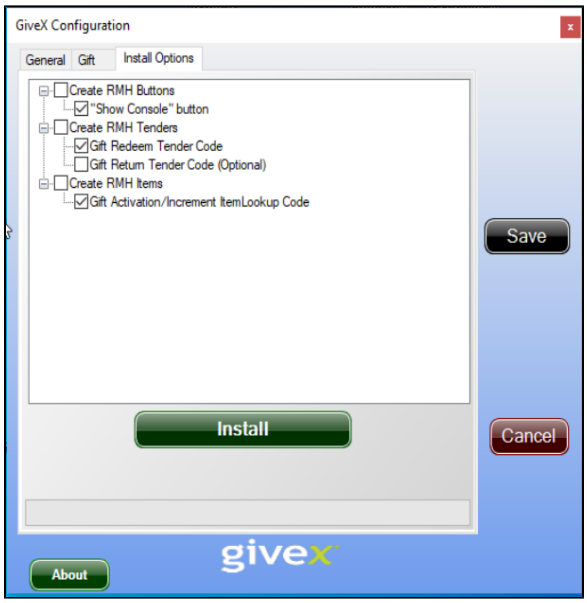
- **Prompt Increment for Active Card:** This option will allow a cashier to proceed with adding value to an active gift card during a standard card activation process. As apposed to using the standard Reload function which can also be enabled /disabled.

- **Check insufficient funds before redemption:** Check this option if you need the program to verify there are sufficient funds on a gift card before attempting redemption.

- **Enable Void and Reload Functions:** Check this box to enable the Void and Reload options in the Gift Card Console. If this option is not checked then the Gift Card Console will only have Activate and Check Balance as options.

Receipt Variable: The default value is 1. Important: Only advanced users should make changes to this setting.

Step 4:



Install Options:

In this tab you can select which GiveX related items, tenders or custom buttons you would like to install.

- **Show Console button:** If this is checked then a Custom Button will be show in RMH POS. This custom button will allow you to launch the Gift Card Console from within RMH POS.
- **Gift Redeem Tender Code:** If this is checked then the redemption tender you specified in the Gift Tab will now be installed in your RMH database.
- **Gift Return Tender Code (optional):** If this is checked then the return tender you specified in the Gift Tab will now be installed in your RMH database.
- **Gift Activation/Increment Item Lookup Code:** If this is checked then the Item Lookup Code you specified in the Gift Tab will now be installed in your RMH database.

If you do need to install any of these options, check them and then click on the green **Install** button.

Important: If this software is deployed in an Central environment, it is recommended to manage item and tender changes from Central and push the item changes to the stores.

Step 5:



About:

If you click on the About button it will show a sub window that shows the application name, version number and website address for New West Technologies

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Step 6:

Receipt Template:

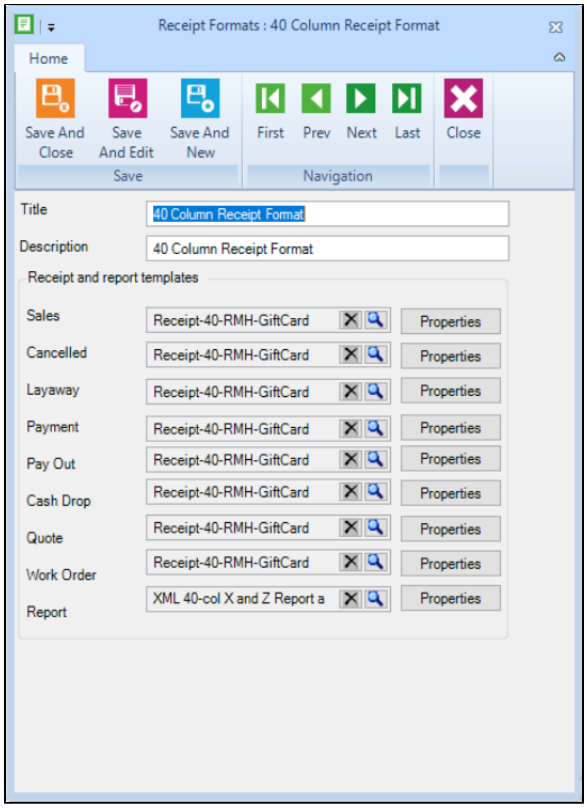
GiveX for RMH installs a custom receipt template that will show the gift card transaction information such as Card Number (partial), Card Balance, Auth Number and GiveX Transaction Type (IE: Activation, Redemption etc).

Receipt configuration in RMH is completed from Store Operations Manager. To change the receipt settings in RMH you must launch and log into Store Operations Manager. Next go to menu bar, click on Database, Registers, Receipt Formats. Highlight the receipt format you wish to modify and click Properties on the right hand side.

- **GiftCardReceiptTemplate.xml** - This is the receipt template that comes with GiveX for RMH. The template file will be located at: C:\Program Files (x86)\Retail Hero\RMH POS\Extensions\GiveX\ReceiptTemplates.

Click on the magnifying glass to the right of Sales and then browse to the receipt template you wish to use.

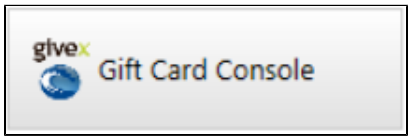
Important - The receipt templates included are based on the default RMH receipt template. If you are using a customized receipt template, any customization will need to be merged.



Using GiveX for RMH

Step 1:

From the RMH POS window you will see a Give Card Console custom button. Click on this button to open the Gift Card Console window.



Step 2:

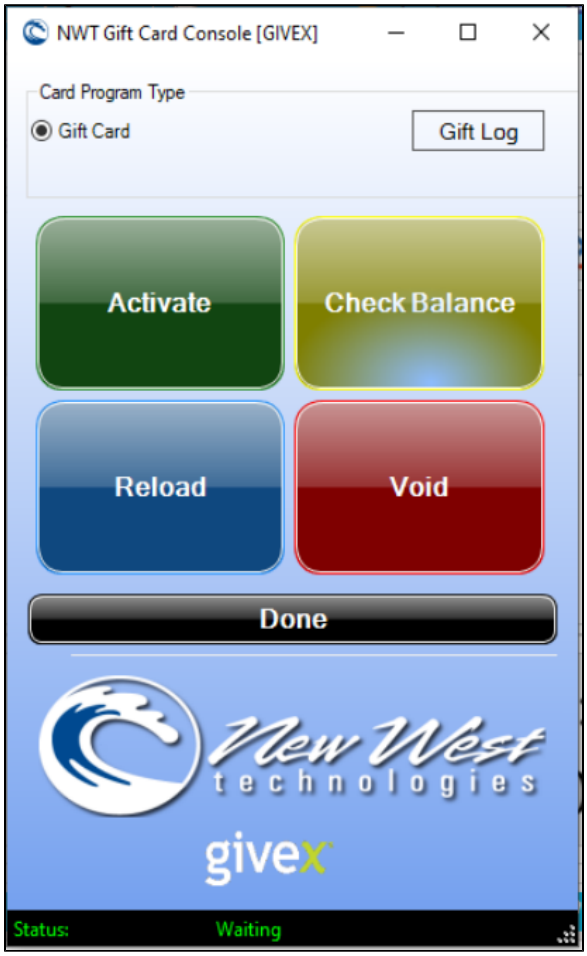
Gift Card Console

This console window allows you to:

- **Activate:** Start the activation process for a new gift card,
- **Check Balance:** Check the balance of an activated gift card,
- **Reload:** Reload balance on an activated gift card or
- **Void:** Void a transaction for an activated gift card.

Important: If you do not see the Reload or Void options in the Gift Card Console that is because they have not been abled in the GiveX Configuration utility.

Lastly, you can click on the **Gift Log** button to launch the Gift Card Transaction Log window.

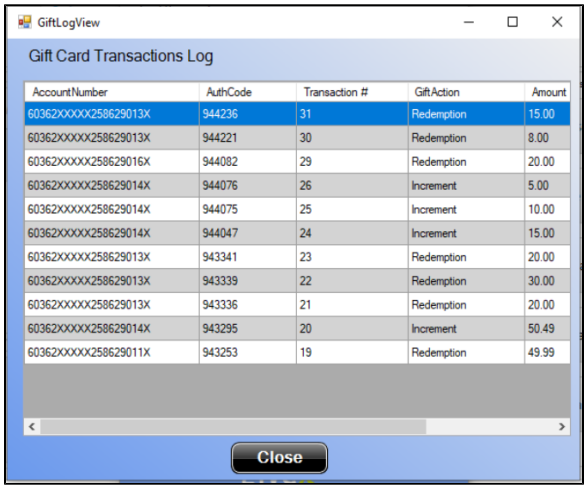


Step 3:

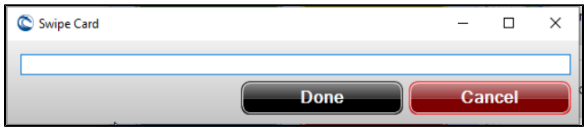
Gift Card Transaction Log:

This window shows you a list of the completed gift card transactions such as Activation, Increment and Redemption. It also shows the Auth code for each of those transactions which is required information if you wish to Void/cancel a gift transaction.

If you are using the GiveX custom receipt template then the Auth code will also be listed on the printed receipt.



Step 4:

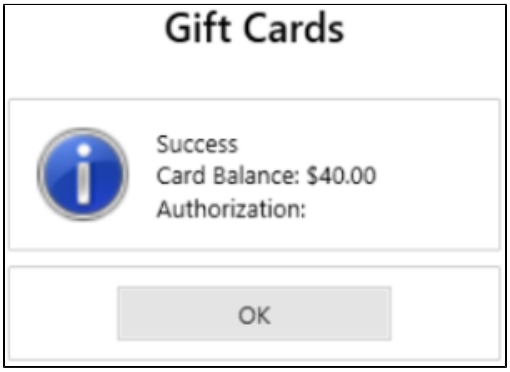


Check Balance

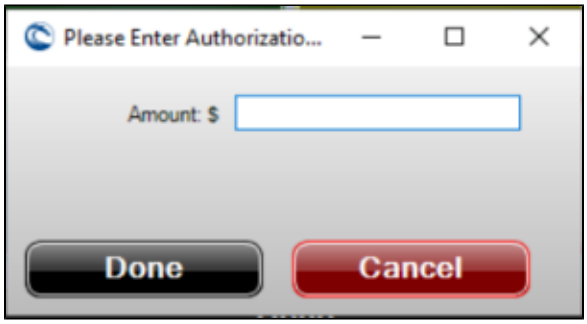
To check the balance of a GiveX gift card first click on the Check Balance button on the Gift Card Console.

Next swipe the gift card when prompted to.

A separate window will appear showing the gift card's current balance.



Step 5:



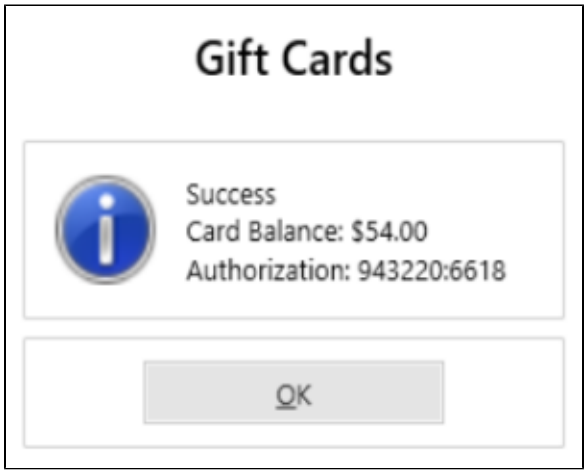
Activation

To activate a gift card first click on the Activate button on the Gift Card Console.

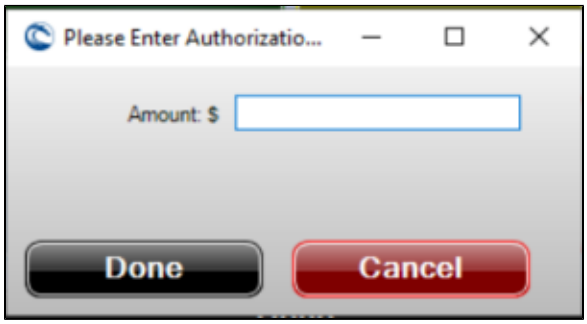
Next enter the dollar amount you would like to place on the new gift card and click Ok.

The Item Lookup Code assigned for gift card activation will appear on the RMH POS transaction screen. Complete the tender process by paying with card or cash.

Finally, swipe the gift card when prompted and a notification window will appear indicating the card has been activated and show the current balance.



Step 6:



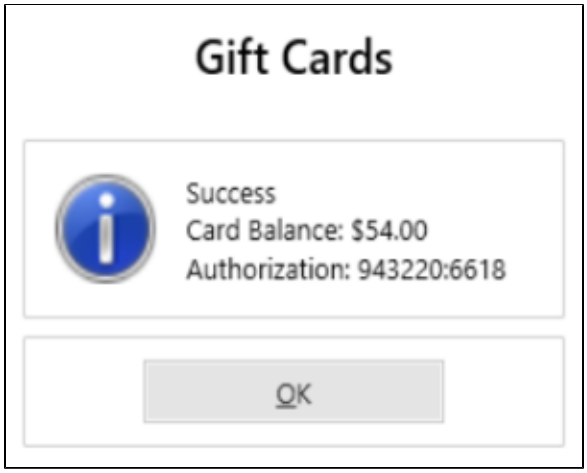
Reload

To Reload, or add balance to a gift card, first click on the Reload button on the Gift Card Console.

Next enter the dollar amount you would like to place on the existing gift card and click Ok.

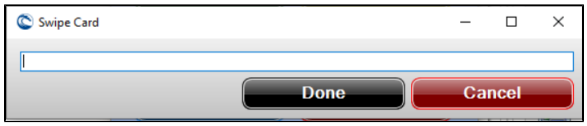
The Item Lookup Code assigned for gift card reload will appear on the RMH POS transaction screen. Complete the tender process by paying with card or cash.

Finally, swipe the gift card when prompted and a notification window will appear indicating the card balance has been updated.



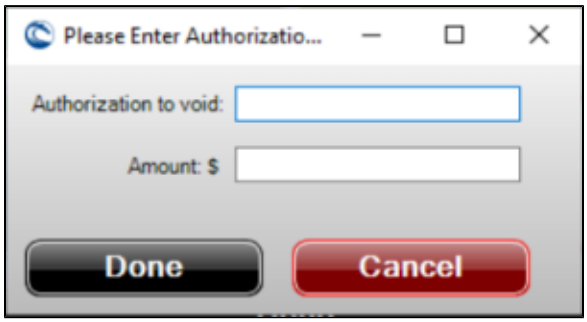
Step 7:

Void



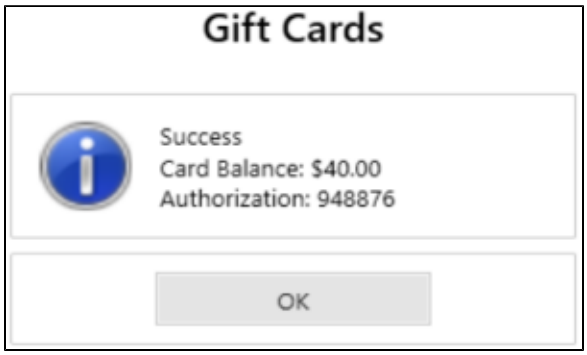
To Void a gift transaction first you must click on the Void button located on the Gift Card Console.

Next you will be prompted to swipe the gift card that was previously used.



In the next window you must enter the authorization number from the transaction you wish to void. This authorization number can be found in multiple places, such as the customer's receipt, the journaled receipt in RMH POS or in the **Gift Card Transaction Log** from the Gift Card Console. You will also need to enter the dollar amount from the transaction you wish to Void.

Once those two pieces of information have been entered and you click on the Done button, a window will appear showing the transaction was successful. It will also show the updated gift card balance and the void transaction authorization number.



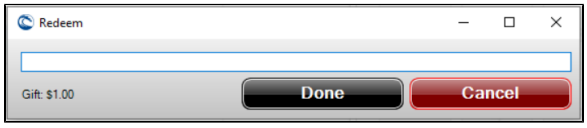
Step 8:

Redemption



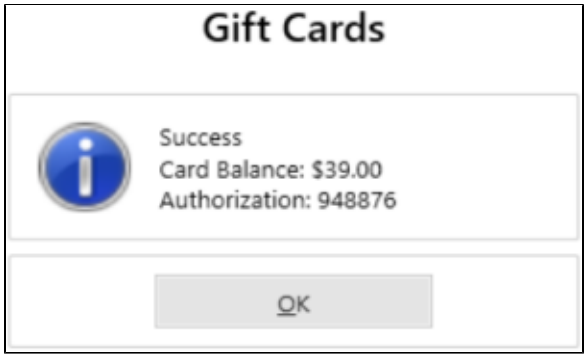
To make a purchase with a GiveX gift card (redemption), first ring up an item for sale in the RMH POS transaction screen.

Next start the tender process and use the tender that was specified for redemption in the Gift Card Console earlier. The default name is "GiveX Gift Redeem".



After that you will be prompted to swipe the gift card you wish to use.

Finally, a window will appear indicating that the transaction was successful. It will show the reduced card balance and the authorization number for that transaction.



Step 9:

Receipt

Here is an example of a GiveX for RMH receipt.

In order for the receipt to show the gift card number, gift card balance, authorization number and transaction type you must have configured RMH Manager to use the GiveX for RMH receipt template first. Please see the **Configuration** section of this guide for further details.



Contact Information

New West Technologies

Phone: 503-235-4656

Email: support@newestech.com

GiveX

Phone: 800 962 4935

Helpdesk ticket: https://givex.odoo.com/helpdesk-ticket