UserGuide

Gift Cards
Manual

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Welcome

Thank you for choosing Valutec as your gift card solution. Whether you are looking to sell, redeem, replace or simply check the balance of your existing cards, Gift Cards makes this process easy to use. Selling and redeeming gift cards is as easy as receiving payment via credit or debit cards.

Installation

Gift Cards will need to be installed on each register. Simply run the PC-based installer or reference the installation walkthrough to complete the default installation.

Requirements

The following prerequisites must be met prior to installing and running the application:

Software

- Windows XP, Windows 7 (32-bit)
- Microsoft Retail Management System v2.0 (RMS)
- Microsoft SQL Server 2005, 2005 Express, 2008 or 2008 Express
- Microsoft .NET Framework v4.5 (required for TLS 1.2 compatability)

Hardware

- Magnetic Swipe Reader (MSR) configured to read both tracks 1 and 2 (optional, manual card entry permitted). Requires Keyboard Wedge MSR, OPOS is not currently supported.

Other

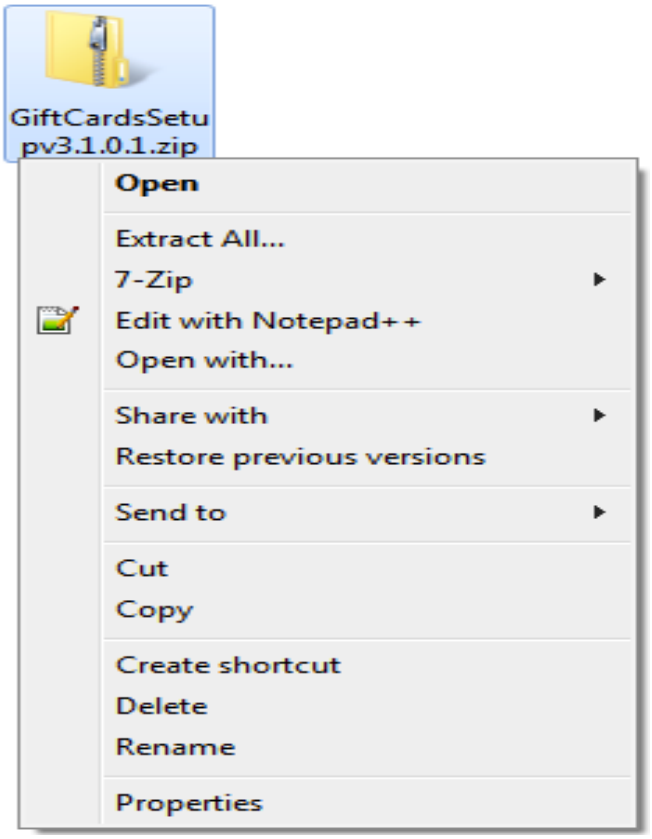
- Valutec Terminal ID (Contact www.valutec.net)
- Location Name (Contact www.valutec.net)
- Merchant ID (Contact www.valutec.net)
- Terminal ID (Contact www.valutec.net)
- Client Key (Contact www.valutec.net)
- ISP (Internet Service Provider)
- Access to the payment gateway {*}{+}https://ws.valutec.net/valutec.asmx+* over port 443

Features & Changes

Version:	Features & Changes:
3.1.0.1	• Updated Valutec Provider URL • Additional credentials fields added to Gift Card Configuration utility

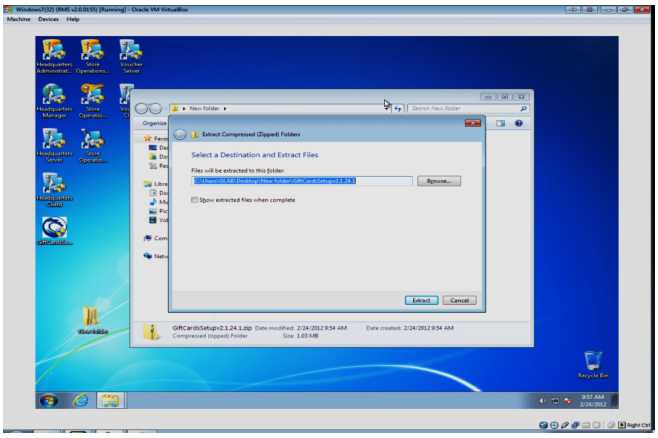
Installation Walkthrough

Step #1



If the software arrived as a compressed ZIP package, or archive, (denoted by the Zipper on the folder) extract the files by right-clicking on the archive and selecting **Extract All**. If the software arrived as an executable, please continue to ***Step #3***.

Step #2



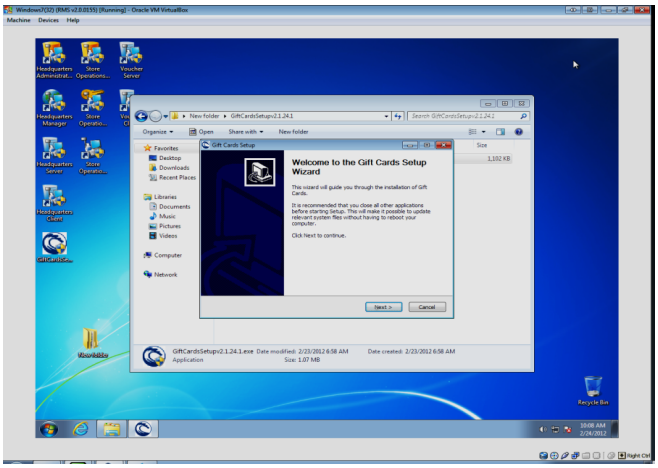
Click **Browse** to select a folder into which the files will be extracted. By default, a new folder will be created in the same place as the archive with the same name (in this case, GiftCardsSetupv3.1.0.1).

Select **Extract** and wait for the progress bar to fill, indicating that the file extraction has completed.

Step #3

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

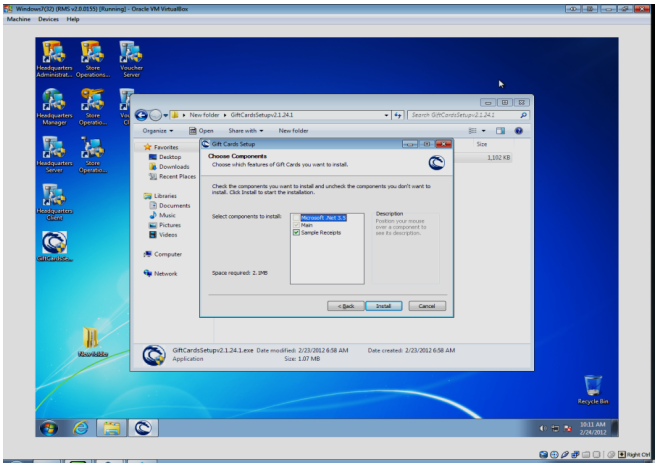
Step #4



Please review the welcome screen and perform any recommended tasks.

Click **Next** to continue.

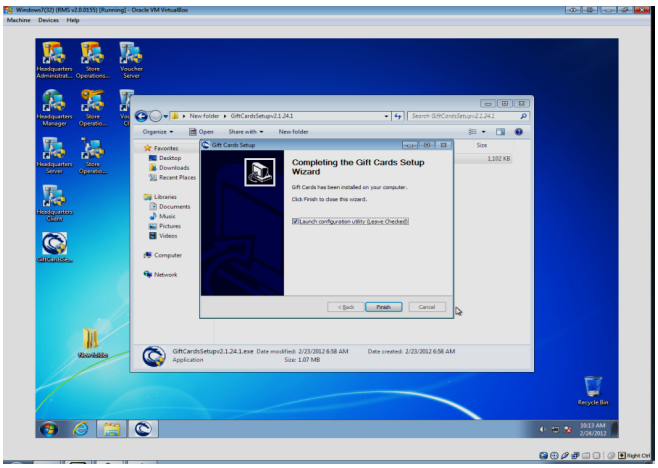
Step #5



Select the components you wish to install (all components are recommended). Components which are grayed out and checked are required. Components which are grayed out and unchecked, indicates a compatible version has been detected.

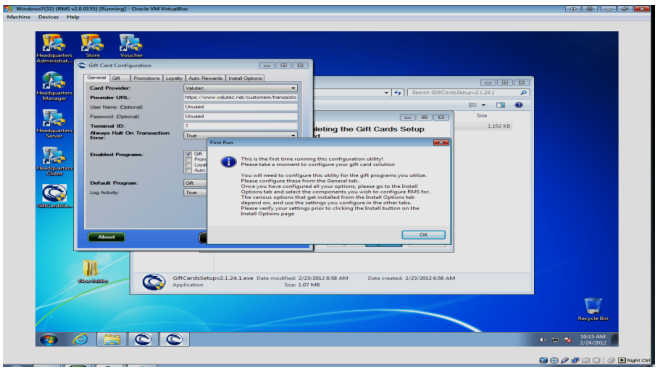
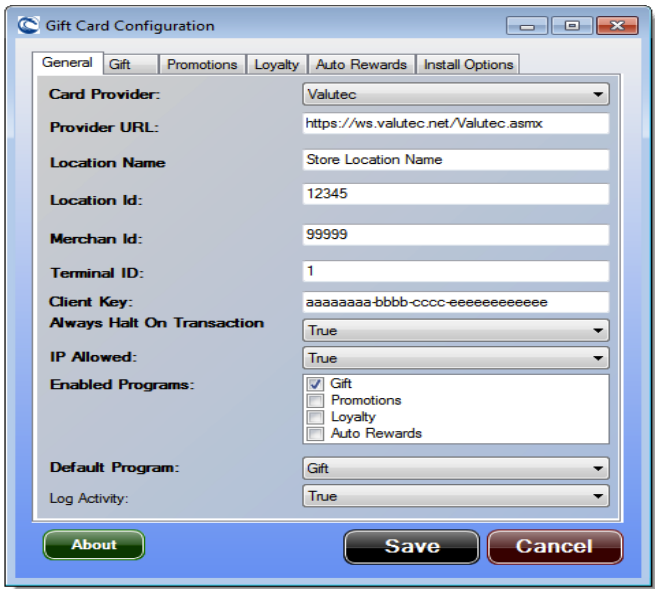
Click **Install** to continue.

Step #6



It is recommended to launch the configuration utility, or uncheck this option to complete the configuration later. (See **Configuration**) Click **Finish** to continue.	

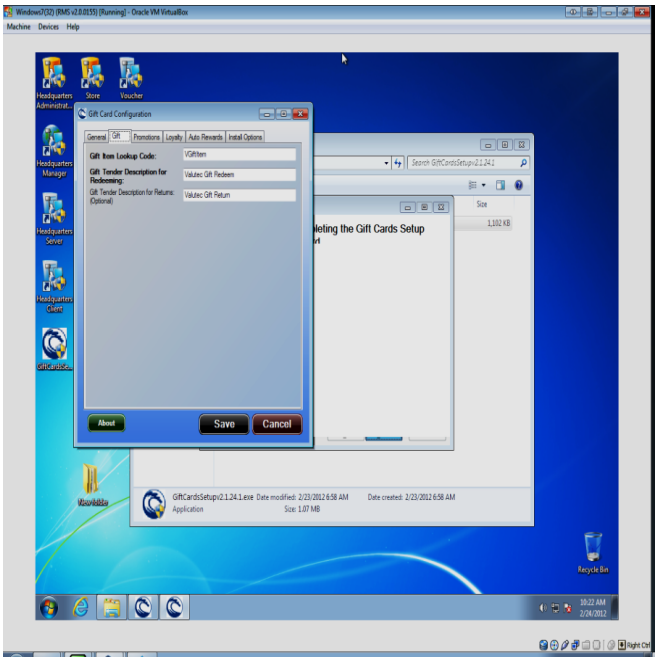
Configuration

## First Run	
Upon the first time run of the configuration utility, you will receive a brief message explaining the tasks which you will need to complete before you can use the Gift Cards add-on.	
## General	

Select the configuration which meets your needs. **Card Provider:** Valutec **Provider URL:** This is the URL provided by Valutec to update card data. _https://ws.valutec.net/valutec.asmx_ **Location Name:** Enter the Location Name provided by Valutec. **Location ID**: Enter the Location ID provided by Valutec. **Merchant ID**: Enter the Merchant ID provided by Valutec. **Terminal ID:** Enter the Terminal ID provided by Valutec. **Client Key:** Enter the Client Key provided by Valutec.	

## General (Continued)	
Always Halt On Transaction Error: Here you may configure how you would like the transaction to be completed in the event you swipe an invalid card. **True**: Allows you to use a new Card (recommended) **False**: Will continue to process sale, this will not prompt for card nor will it apply value to the card. **Enabled Programs:** Select the program/card types you wish to sell and support in your store. **Default Program:** Select the default program/card type you will commonly use. **Log Activity:** This feature allows you to log all transaction history, from selling of a card, to simply checking the balance. All data is viewable from the Gift Card Console. See **Log Viewer** for more information.	

Gift

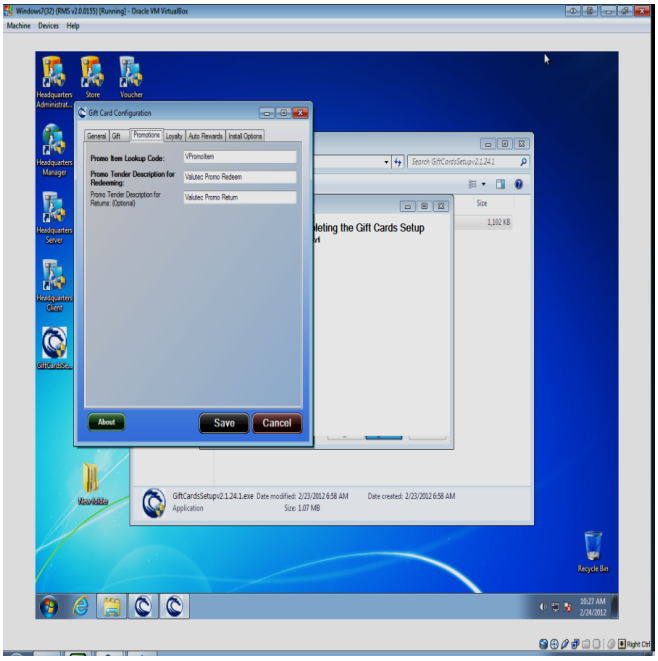


Gift Item Lookup Code: Enter the Item Lookup code you would like to use when purchasing gift cards.

Gift Tender Description for Redeeming: Enter the tender description used to redeem gift cards.

Gift Tender Description for Returns: Enter the tender description used to return gift cards. This feature is optional for reporting purposes only.

Promotions

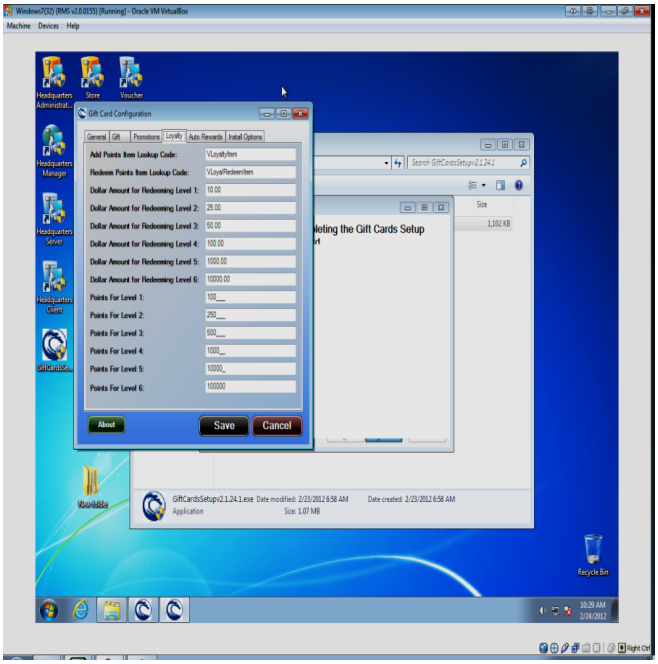


Promo Item Lookup Code: Enter the Item Lookup code you would like to use when issuing promo cards.

Promo Tender Description for Redeeming: Enter the tender description used to redeem promo cards.

Promo Tender Description for Returns: Enter the tender description used to return promo cards. This feature is optional for reporting purposes only.

Loyalty



Add Points Item Lookup Code: Enter the Item Lookup code you would like to use when issuing Loyalty cards.

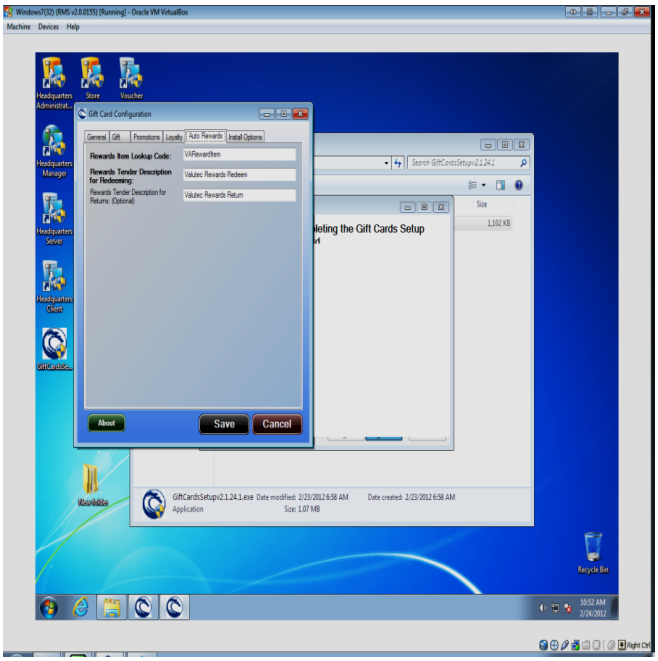
Redeem Points Item Lookup Code: Enter the Item Lookup code you would like to use when processing Loyalty cards.

Dollar Amount for Redeeming Level 1 – 6: Enter the redeemable dollar amount for each point level. The amount entered will later be used when redeeming loyalty points. See **Redeem Loyalty Card** for more information.

Points For Level 1-6: Enter the minimum points required to reach each level.

Important: You will need to work with your Gift Card Sales Rep to setup point levels and points per dollar.

auto Rewards

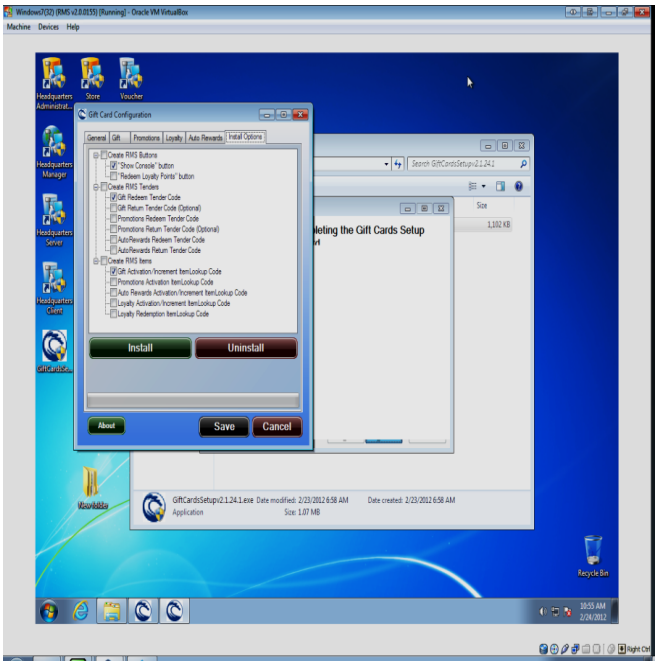


Rewards Item Lookup Code: Enter the Item Lookup code you would like to use when issuing rewards cards.

Rewards Tender Description for Redeeming: Enter the tender description used to redeem rewards cards.

Rewards Tender Description for Returns: Enter the tender description used to return rewards cards. This feature is optional for reporting purposes only.

Install options



Select the options you wish to Install. Once you have selected all features you wish to use, simply select **Install** to add these features to your existing database or select **Uninstall** to remove features.

Important: If you are running a multi store environment utilizing Microsoft Retail Management Systems Headquarters integration, then it is recommended to create all Items and Tender types from HQ Manager. See HQ Support for more information.

About: Press about to view product details.

Save: Press save to save all configuration changes.

Cancel: Press cancel to exit and discard any changes made.

Gift Card Console

Card Program Type



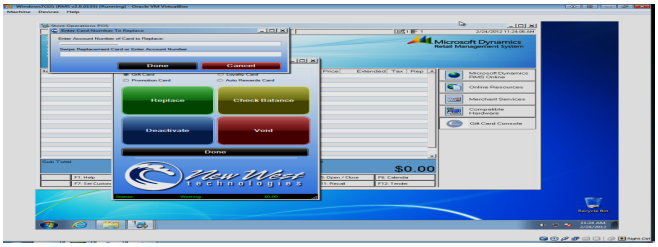
- Gift Card
- Promotion Card
- Loyalty Card
- Auto Rewards Card

You must select the card program type before performing the selected task.

Examples:

1. Select Gift Card before selecting check balance to check the balance of a Gift Card.
2. Select Loyalty Card before selecting check balance to check the balance of a Loyalty Card.

Replace



This feature allows you to replace an existing card.

1. Select the Card Program Type and then press **Replace**.
2. Swipe the card or enter the card number of the card you wish to transfer balnce from.
3. Swipe the card or enter the card number of the card you wish to transfer balance to (card must not be active).

Important: The card which you are transferring balance from will deactivate and will no longer be usable.

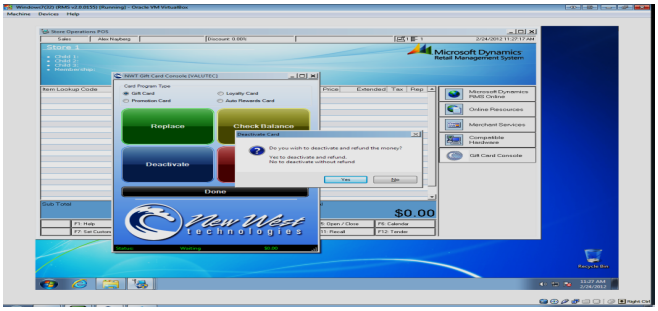
Check balance



This feature allows you to check the balance of an existing card. This may also be done from www.valutec.net.

1. Select the Card Program Type and then press **Check Balance**.
2. Swipe the card or enter the card number of the card you wish to check balnce.

Deactivate



This feature allows you to deactivate an existing card.

1. Select the Card Program Type and then press **Deactivate**.
2. Swipe the card or enter the card number of the card you wish to deactivate.

Important: When deactivating a card and refunding money to customer, you will need to complete the transaction void process. See void process dependent on the Card Program Type used.

Void



This feature allows you to void an existing card transaction.

1. Select the Card Program Type and then press **Void**.
2. Swipe the card or enter the card number of the card you wish to void.

Important: When voiding a card and refunding money to customer, you will need to complete the transaction void process. See void process dependent on the Card Program Type used.

Usage

Purchase Gift/Promo Card

Purchasing a gift/promo card is as easy as purchasing any item. Add the item to the transaction screen and enter the value to be applied to the gift/promo card. Tender the transaction by completing the tender process within your store environment. When prompted for the card information, simply swipe the gift/promo card to activate or add value.

Note: See Configuration for available gift card item lookup codes.

Important: You may not purchase a gift card with a gift card so you will need to use another payment method (i.e. cash, credit, etc.).

Important: Adding value to promo cards is optional. Contact your Valutec sales rep for details.

Redeem Gift/Promo Card

Redeeming value from a gift/promo card is done simply by selecting the appropriate tender type. Tender the transaction by completing the tender process within your store environment. When prompted for the card information, simply swipe the gift/promo card to redeem value from that card. If redeeming multiple cards, each card swipe request will display the amount to be applied for that card.



Example:
Jane purchases 1 pair of shoes for $40.00. Jane has 2 gift cards:

1. $10.00 balance
2. $30.00 balance

From the tender screen, enter the amount to be applied to the first gift card in the gift card tender field and press enter. Note a second line appears for the same tender type. Enter the amount to be applied to the second gift card in the gift card tender field and press enter. Note the total due and total tendered match and the balance equals (0). Complete the tender process and swipe the appropriate card (expected card balance is denoted in bottom left corner of card swipe window).

Void Gift/Promo Card

There are a couple ways to void the gift/promo cards. It is recommended to complete the void from RMS. Simply perform the standard RMS void procedure and complete the requested steps when prompted.

1. Void transaction from RMS void process
    1. Select **Recall** (F11)
    2. Select **Void a transaction**
    3. Enter **Date Range**
    4. Select **Transaction #**
    5. Press **OK** to apply value back to the tender type used durring sale
    6. Acknowledge message informing you to complete steps required to void gift card
    7. Select the **Card Program Type**
    8. Select **Void** form the gift card console
    9. Swipe card when prompted
    10. Enter **Authorization Code** when prompted (can be found on receipt)
    11. Acknowledge message informing you of card balance
    12. Press **Done** from the gift card console
    13. Complete transaction per current environmental configuration
2. Void transaction from gift card console
    1. Run **Gift Card Console**
    2. Select the **Card Program Type**
    3. Select **Void**
    4. Swipe card when prompted
    5. Enter **Authorization Code** when prompted (can be found on receipt)
    6. Acknowledge message informing you of card balance
    7. Press **Done** from the gift card console to exit

Issue Loyalty Card

Issuing a loyalty card requires that you add the loyalty Item to the transaction. When tendering the transaction, you will be prompted to swipe /enter the card number. Upon completion of sale, the card will receive points and increment the level of redemption.

Important: Point values are determined and set per customer and their gift card processor. See Gift Card Configuration > Loyalty.

Redeem loyalty Card

Points are redeemed by selecting the **Redeem Points** button from your point of sale screen. Select the appropriate point level to redeem when prompted (check card balance to determine available point level). Upon successful redemption of points, you will see an additional line item added to the sale which will contain a (neg) dollar amount and will be applied to the transaction. Any remaining balance will need to be tendered from a non-gift card tender type.

Important: When redeeming points, be sure to note the authorization code received upon successful redemption of points.

Important: if you remove the loyalty redeem item from the transaction, the points will not be placed back to the card used. Complete the below steps to apply points back to card:

1. *Cancel the current transaction*
2. *Complete Void Loyalty Card > Option (B)*

Void loyalty Card

There are a couple ways to void the loyalty cards. It is recommended to complete the void from RMS. Simply perform the standard RMS void procedure and complete the requested steps when prompted.

1. Void transaction from RMS void process
    1. Select **Recall** (F11)
    2. Select **Void a transaction**
    3. Enter **Date Range**
    4. Select **Transaction #**
    5. Press **OK** to apply value back to the tender type used during sale
    6. Acknowledge message informing you to complete steps required to void gift card
    7. Select the **Card Program Type**
    8. Select **Void** form the gift card console
    9. Swipe card when prompted
    10. Enter **Authorization Code** when prompted (can be found on receipt)
    11. Acknowledge message informing you of card balance
    12. Press **Done** from the gift card console
    13. Complete transaction per current environmental configuration
2. Void transaction from gift card console
    1. Run **Gift Card Console**
    2. Select the **Card Program Type**
    3. Select **Void**
    4. Swipe card when prompted
    5. Enter **Authorization Code** when prompted (can be found on receipt)
    6. Acknowledge message informing you of card balance
    7. Press **Done** from the gift card console to exit

Receipt templates

Gift Cards will install a default 40 Column and Full Page Receipt Format template. Each template is based off the default RMS template received. If you are using a customized receipt template, we recommend working with your RMS vender to consolidate these receipt templates to meet your environmental needs. Receipt templates can be found in the following directory (default Install: C:\Program Files\New West Technologies\Gift Cards\ReceiptTemplates\GiftCard).

Note: Assistance in modifying the receipt template may also be obtained by the software manufacture New West Technologies. Please note billable time may be accrued.

Configure Reciept template

1. See RMS Help menu > Contents > Search > Creating receipt formats
2. See RMS Help menu > Contents > Search > Assigning receipt formats to registers

Log Viewer

Log Viewer is enabled (default) to track all gift card transactions (see Gift Card Configuration > General). You can view the log viewer by selecting the hidden button when pressing **Status** from the Gift Card Console. Here you will find:

- **AccountNumber** = Card Number
- **RequestedAction** = Task performed
- **MessageType** = Card Type
- **Authorization** = Authorization Code for transaction
- **ErrorCode** = Error message received
- **TransactionTime** = Time and Date of transaction

Selecting one of the column headers will filter either ascending (up arrow) or descending (down arrow). This feature can be useful when needing to find a card which was sold in a specific date range or retrieving the authorization code for transactions completed on a specific card number, etc.

HQ Support

Create Tenders

Creating your Tender types is performed in the same fashion as you may have completed when creating your existing tender types (i.e. cash, credit, etc.). Below you will find an example of creating new tender types. For more information on creating tender types in RMS HQ. Please reference your HQ manual or the help guide found in Headquarters Manager > Help > Content > Tender Types.

1. Verify Headquarters is in **Maintenance Mode**
2. On the **Database** menu, click **Tender Types**, and then click **New**
3. Edit the **General** Tab
4. Enter the tender **Description** (The description you choose to enter here will need to be configured based on the tender descriptions applied in the Gift Card Configuration)
5. Enter the **Tender Code** (this should be unique between each tender type)
6. Set the tender type to (**Other**)
7. Set the currency to (**Default Currency**)
8. Enter the **Display order** (this can be set in any order you choose)
9. Check **Prevent cashier overtendering** and **Allow multiple entries**

Once you have entered all tender types, you will need to process a Worksheet Style-205 for all stores. Please reference your RMS HQ help guide for more information about this worksheet (Headquarters Manager > Help > Content > Worksheet Styles).

Create Items

There are many different ways to add items to your database. Below we have provided an example of how this can be manually created and the features which will need to be selected for each Item type. For more information on creating Items in RMS HQ. Please reference your HQ manual or the help guide found in Headquarters Manager > Help > Content > Adding New Items.

1. Verify Headquarters is in **Maintenance Mode**
2. On the **Database** menu, click **Items**, then click **New** and **Standard** Item
3. Edit the **General** tab and choose the type of Items you want to create (**non-inventory**)
4. Enter the **Item Lookup code** (The Item lookup code you choose to enter here will need to be configured based on the Item lookup code applied in the Gift Card Configuration)
5. Enter the **Description** (this can be set to your own personal preference)
6. Edit the **Options** tab and check **Must enter price at the POS** (Not required for loyalty Item)

Once you have entered all items, you will need to process a Worksheet Style-260 for all stores. Please reference your RMS HQ help guide for more information about this worksheet (Headquarters Manager > Help > Content > Worksheet Styles).

Troubleshooting

Usage

Need to void a transaction and I do not have the authorization code.	Customer does not have receipt Did not configure RMS to use the gift card receipt template	See log viewer for more information
Receipt does not display the Gift card information.	Incorrect receipt template used	Configure register to use the receipt templates included with gift cards application. See Receipt Templates.
When I swipe the gift card, the card data does not get entered into the card swipe field.	Bad magnetic stripe MSR is not configured to read track 2	Manually enter card data Confirm MSR is configured to read track 2. Run notepad or word on your PC and swipe a card. Should receive results in the following format ;###=###?

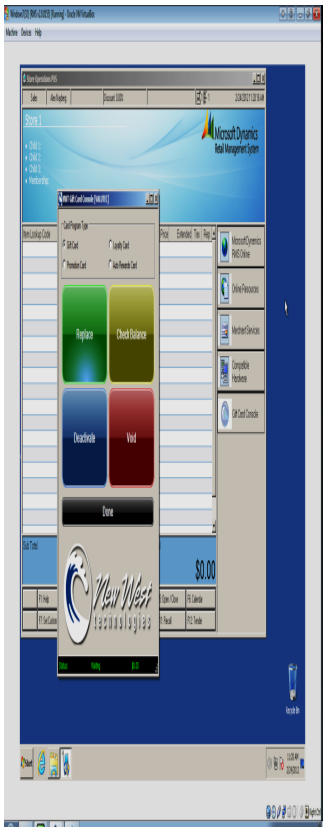
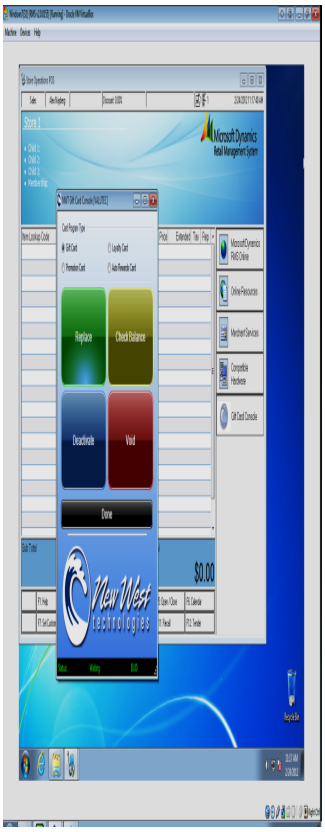
Messages

Message	Causes	Resolution
Cannot activate more than one loyalty type card at a time.	Attempting to redeem loyalty points and earn loyalty points in the same transaction.	Remove loyalty item to add points.
Cannot redeem points. The requested redeem point value is greater than the transaction subtotal.	Transaction amount is less than the redeemable point value.	Confirm the "Dollar amount for redeeming level 1" from Gift Card Configuration > Loyalty.
Card has insufficient funds/points.	Redeeming loyalty points and the card used does not meet the dollar to points criteria configured in Gift Card Configuration > Loyalty	Sale must not exceed the dollar amount configured in Gift Card Configuration > Loyalty. Confirm available points for card from the Gift Card Console.
Enter price from (item description)	Item is configured to "Must enter price at the POS".	This is an RMS configuration and is recommended for all Gift Card Items.

Card was either not found or not active.	Message received if card is not found or active. Voiding a gift card for wrong transaction	You can confirm the activity of this card by performing a balance check from the Gift Card Console or from www.Valutec.net. Confirm the authorization code and card number shown on receipt.
Card was unable to be processed	Received when attempting to add value to a Promo Card which has already been activated Card is invalid/non-active Invalid terminal ID	You can confirm the activity of the card by performing a balance check from the Gift Card Console or from www.valutec.net.
Success Card Balance: $#.## Card Points: # Level: # Authorization: ########	Received upon successful process of gift card transaction	NA
The corresponding program is not currently enabled. To make changes to this program, please enable it from the "General" tab.		Enable the program type from the general tab
This transaction contains a gift card, please void/deactivate card from the gift console.	Transaction was returned or voided.	Run the Gift Card Console and performed a void a return funds back to card or deactivate to close card permanently.

Transaction was returned as a duplicate. Please wait for 5 minutes and try again.	Valutec has enabled this feature.	You may contact valutec and request to disable this feature.
ValutecGiftCardProvider:postRequest() The remote server returned an error: (404) Not Found. At system.NET.HttpWebRequest .GetResponse() At GiftCard.Providers.Valutec. xcce0408497771104 .xf073d5ff04155f92 (stringxed8c10a30314a37f)	Received when invalid "Provider URL" has been entered.	Update the Gift Card Configuration > Provider URL with a valid URL received from valutec.

Windows Theme Control

In some cases it may be neccasary to adjust the windows theme controls to optimize functionality. When changing the windows theme controls, it is recommended you close all running applications before applying changes. This will ensure changes are applied to application form views the next time the application is ran. Contact your system administrator for assistance with windows theme configuration.			
<ac:structured-macro ac:name=" unmigrated-wiki-markup" ac:schema-version="1" ac:macro-id="0769a046-05ed-46fc-bf03-9533c5f6e7c9"><ac:plain-text-body><![CDATA[	**Windows Classic**	**Windows [OS version] (e.g. Windows 7 Basic)**	]]></ac:plain-text-body></ac:structured-macro>
			

Contact information

New West Technologies
4606 SE Division
Portland, OR 97206
Ph. (503) 235-4656
Toll free (800) 466-7839
Fax (503) 235-4416
http://www.newestech.com
support@newestech.com