

SQLPos Gift Card Operations

Basic operational procedures and concerns involving SQLPos tender #14, “Our Gift Card” are listed in this document. Users may use this guide as a framework for developing their own specific operational policies and procedures involving the issuing and redemption of gift cards.

Procedure-Sell a gift card

1. Open sale
2. Select “Issue/Add to gift card”
3. Enter gift card number
4. Enter amount to add
5. Tender sale with payment type.

Procedure-Customer makes a purchase using a gift card

1. Open sale
2. Enter items of the purchase
3. Get gift card from customer
4. Select Gift Card tender type
5. Enter card number
6. Enter amount to use (the default will be the whole sale, but if the sale is greater than the value of the gift card, only the gift card amount will be displayed and the sale will remain open for additional tenders)

Procedure-Customer makes a purchase using multiple gift cards

7. Open sale
8. Enter items of the purchase
9. Get gift card from customer
10. Select Gift Card tender type
11. Enter card number
12. Enter amount to use (the default will be the whole sale, but if the sale total is greater than the value of the gift card, only the actual gift card balance will be used, that balance of the gift card just used is zeroed and the sale remains open for additional tenders.
13. Repeat steps 10-11-12 for each gift card. Remember that if the sale remains open, the balance of the gift card just used is zeroed. If the sale is satisfied by a gift card tender, a balance may remain on the last gift card used, so be sure to give the last card used to the customer.

Procedure-Customer purchased a gift card but returns it for refund

1. Look up gift card value first
2. Open sale
3. Select Return Sale mode
4. Select “Issue/Add to gift card”
5. Enter gift card number
6. Enter amount to return (the value you looked up earlier)

7. Tender with appropriate tender type per store your return sale policy (not all stores provide cash refunds but send a check at a later date).

Procedure-Customer Purchases another gift card and pays with a gift card (aka “transfer balance”)

1. Open sale
2. Select “Issue/Add to gift card”
3. Enter new card number to create
4. Enter amount to add on the new card
5. Select Gift Card tender type
6. Enter existing card number being used to purchase the new card
7. Enter amount to deduct from the existing card (probably the face value of the new card). The result will be the original card balance is reduced and the new card has a balance.

The Clear Sale function and how it affects gift cards:

- If clear sale is invoked during issuing or adding to or a gift card, the issue value or added value is cancelled and the gift card reverts to its original status. In the case of a new issue, the gift card record is created but with a zero balance.
- When a gift card is used as a payment tender, the gift card balance is adjusted immediately when the tender amount is displayed on the screen so that it may not be used again. Clearing the sale with an active gift card tender will return the card to its original balance.
- When multiple gift cards of different values are used as payment tenders, their gift card balances are adjusted immediately when they are tendered, just as with a single card. Clearing the sale with multiple active gift cards of different values will return each card to its original balance.
- When multiple gift cards of identical values are active payment tenders, their gift card balances are adjusted immediately when they are tendered, just as with a single card. However, in this case, clearing the sale will effectively transfer the balances of all the cards into the first card used of that value.

Example: The sale total is \$200 and the customer uses three gift cards, each card carrying a \$50 value. The cards are numbered 71016, 2005 and 41783. Card # 71016 is used first, followed by card #2005 and finally #41783. As the cards are used, their balances are reset to zero but because the cards total only \$150 and the customer still owes \$50, the sale is still open. The customer changes her mind and clear sale is selected. Because all three cards originally carried the same balance, the result is that the balances of all three are essentially transferred to the first card used and therefore, card# 71006 is reset to \$150 while cards #2005 and #41783 are zeroed.

Network Connection Maladies and how they affect Gift Cards

- During the issue/add to function, the balance of the gift card and value is either created or incremented immediately after the \$ value is entered and the item appears in the sale window. At this point of the sale, if a network connection problem occurs between the main server and the workstation and the sale is subsequently cleared at the workstation, the workstation's clear sale operation cannot reset the card to zero because the workstation cannot connect to the database. The gift card used in the failed transaction should be retained and marked in some way so that a manager can manually reset the card's balance to zero.
- During the act of using gift card tenders, when the amount is entered of the gift card, the card's balance is decremented immediately, even if the sale remains open for additional tenders. At this point of the sale, if a network connection problem occurs between the main server and the workstation and the sale is subsequently cleared at the workstation, the workstation's clear sale operation cannot restore the card's balance because the workstation cannot connect to the database. Additionally, since gift card operations require that there be a connection to the central database, issuing a replacement gift card to the customer is impossible until the network connection is restored. The gift card used in the failed transaction should be retained and marked in some way so that a manager can manually reset the card's balance to its original value. It's advisable that the customer's name, address and telephone number be secured so that a replacement gift card may be sent to him/her when the network issue is resolved.