

Setting Up eGift Cards in the Catalog Manager

To get started, gift cards need to be created in the Catalog Manager. See below. Start by selecting New Product and set the product type as Gift Card. This will prompt the system to generate a card number when an order is placed. Give the gift card a name (For example: use the card \$ value in the title) and make the retail price the cost of the card. The Gift Card should not be taxable and activated for each customer class that can purchase them.

Please note: the customer class tiles at the bottom of the product screen do not include the discount field. Gift Cards cannot be discounted using customer class discounts. Discounts on gift cards can be done with a POS quick discount, a discount rule, or a promo code.

The screenshot shows the ORDERPORT ADMINISTRATION interface. The top navigation bar includes the ORDERPORT logo and the word ADMINISTRATION. A user greeting "Welcome, Rick Belisle" and a "Log out" link are visible. The main content area is titled "Catalog Manager" and "Very Fine Winery". A dark blue navigation bar contains links for "New SubGroup", "New Product", "Clone Product", "Delete Product", and "Groups". The product title is "Product: Gift Card \$100". Below this, there are tabs for "Product Info", "Group & Sub Groups", and "Status". The "Product Info" tab is active, showing various fields for product configuration. An orange arrow points to the "Product Type" dropdown menu, which is set to "Gift Card". Other fields include SKU (88881111-0243), Part No* (0243), Product Category (Sean's New Category), Title* (Gift Card \$100), POS Title* (Gift Card \$100), Point of Sale Printer Mode (Receipt), Hidden On (checkboxes for Point of Sale, Web Store, Admin Cart, Wine Club, UApi), Registration No., Brand Name, and Navision Product Type (Gift Card). A "Select Image" button is also present. At the bottom, there is a table with columns for Declared Value, Cost, Weight, Low Stock, Tax, and Touch Qty. The table contains the following data:

Declared Value	Cost	Weight	Low Stock	Tax	Touch Qty
\$ 100.00	\$ 0.00	lbs 0.10	50	<input type="checkbox"/>	0
Basket Min	Basket Max	Cust. Acct. Max	Real Time Inv Track	Adult Signature	
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ShipCompliant	Product Key	Tax as Wine	Tracked Free Tasting		

Once the product details are set, go to the Group and Sub-Groups tab and add the product to a group or create a gift card group in the Webstore and Point of Sale. The new product needs to be made active when its available for purchase and inventory needs to be added in the Inventory module to enable the gift card to display in the webstore.

Once a product has been created in the catalog manager it can be cloned to create versions and inventory needs to be added for each version created.

When a Gift Card is sold in the point of sale the clerk is prompted for a card number after the gift card is added to the cart. If the customer is purchasing a physical card the clerk enters the card number found on the back of the card. To prompt the system to generate an eGift Card the clerk enters 16 zeros. The customer will receive the gift card info that is generated when the order receipt is emailed. An emailed receipt is required for eGift Card purchases in the point of sale.

More on Gift Cards

Gift card purchases show in the Business Summary Report as a gift card deposit. When the gift card is used, the amount used will show up as an applied payment under the type Gift Card.

The eGift Cards are compatible with Apple Wallet. When customers receive their gift card details, a prompt will ask the customer if they would like to add the gift card to their Apple Wallet. Using Apple Wallet will enable customers to pay with their phone. Clerks can scan the code presented after clicking on the barcode symbol on the gift card payment screen. The OrderPort app will need access to the iPad or iPhone camera to complete the scan if a hand-held scanner is not being used with the POS.

Once eGift Cards are activated all webstore purchases of gift cards will generate an eGift Card. The *Lost Gift Card* function in the point of sale can be used to transfer funds from an eGift Card to a physical card.

UPS and FedEx will still provide shipping rates as for a gift card as with any other product. To prevent customers from selecting paid shipping for an eGift Card the weight for eGift Cards needs to be set to 0. If this is done the system will not ask the customer to select a shipping method or a pickup location, they will simply have to enter payment info and they will receive the appropriate email.



POS | Club | eCommerce | Reservations | Loyalty | Essential Integration
