



2TouchPOS Gift Cards Reference Guide

©2014 Xenios LLC
82 Saint Paul Street
Rochester, NY 14604
Phone 585.325.5242 • Fax 585.325.6989

Contents

About this Document	3
Setting Up Gift Cards	4
Activating Gift Cards	5
Reloading Gift Cards.....	5
Checking a Gift Card Balance.....	5
Setting Up Gift Cards as a Payment Option.....	5
Taking Payment with a Gift Card	6
Viewing Gift Card Details.....	8
Reassigning Gift Cards.....	9
Gift Card Detail Report.....	9
Gift Card Program Summary Report	9
Gift Card Promotion Report.....	10
Showing Gift Card Summary Information on the Z-Report	10

About this Document

This document was written for 2TouchPOS version 3.03.5200.

Setting Up Gift Cards

1. From an empty speed screen, Touch, **Options**, **Admin**, **Customers**, and **Gift Card Settings** buttons.
2. Select local program from the gift card mode pull down menu.
3. Under Gift Card settings, enter days to expire, or leave blank if the gift card never expires
4. Administrative Fees are additional fees added or deducted from a gift card after a specified time period.
5. Touch "**Save**" button.

Activating Gift Cards

1. From an empty Speed Screen, swipe an encoded gift card.
2. You will be directed to the screen below.
3. Select Gift Card Type.

Fixed: Gift Card amount is pre-programmed at time of printing. CAN'T re-load

Variable: Gift Card amount is specified at time of gift card activation. Can re-load dollar amounts.

4. Enter valid till (card expiration date), and select or enter card amount.
5. Touch the save button and the gift card is activated!

Reloading Gift Cards

1. A variable gift card is reloadable. Fixed value cards are NOT reloadable.
2. From an empty speed screen, swipe a gift card. The gift card details screen will open.
3. Touch the Gift Card increase button to Add to card value.
4. Enter the Additional Amount to gift card.
5. Touch "**Save**" button.

Checking a Gift Card Balance

1. From an empty speed screen, swipe a gift card. The Gift Details form will open.
2. Touch the Just Looking button to return to the Speed Screen without making changes.

Setting Up Gift Cards as a Payment Option

1. From an empty Speed Screen, Touch **Options, Admin, System Settings & Payment Types** buttons.
2. Select Gift Cards and touch box. A check mark will appear.
3. Touch Enabled box. A check mark will appear.
4. Touch "**Save**" button.

Taking Payment with a Gift Card

Speed Screen

1. From Speed Screen, Touch “**Tabs**” button.
2. Select an open tab.
3. Touch “**Payment**” button.
4. Follow either Figure 1 or 2

Table View Management Screen

1. From Table View Management Screen, select the table.
2. Touch “**Payment**” button.
3. Follow either Figure 1 or 2

Figure 1

Upon taking a gift card as payment, from the payment screen touch gift card, then swipe customer’s gift card.



Figure 2

Besides swiping a customer's gift card, you can enter gift card number.



Viewing Gift Card Details

1. From an empty speed screen, Touch Options, Admin, Customer, & Gift Cards. The Gift Card Lookup form will open.
2. Touch the Filter button. The Gift Card Filter form will open.
3. Enter the information for the gift card you want to view in the appropriate field.
4. Touch the Apply button to search for the gift card based on the criteria you entered.
5. Select the gift card from the list. If applicable, use the Up and Down arrows to scroll through the list of gift cards.
6. Touch the View Details button to view the details of the selected gift card. Details of all the transactions are listed from newest to oldest for the selected gift card.

Gift Card Summary

1. **Transaction Type** – This lists type of transaction
2. **Transaction Date** – The date the gift card transaction took place
3. **Transaction Amount** – The amount the gift card value was changed by the transaction.
4. **UserID** – The User/Employee who performed the transaction
5. **Balance** – The value on the gift card following the transaction.
6. **Ticket Number** – The ticket number for the transaction.

Reassigning Gift Cards

Reasons for re-assigning a gift card:

- If a customer loses their card
 - A card gets damaged so the magnetic stripe will no longer work.
1. From an empty speed screen, Touch “**Options**”, “**Admin**”, “**Customer**” & “**Gift Cards**”. The Gift Card Lookup form will open.
 2. Touch the “**Filter**” button. The Gift Card Filter form will open.
 3. Enter the information for the gift card you want to –reassign in the appropriate field.
 4. Touch the “**Apply**” button to search for the gift card based on the criteria you entered.
 5. Select the gift card from the list. If applicable, use the Up and Down arrows to scroll through the list of gift cards.
 6. Touch the “**Reassign Card**” button to re-assign the selected gift card.
 7. Swipe the new gift card.

Gift Card Detail Report

1. From an empty speed screen, Touch Options, Reports, Customer Management & Gift Card Detail Report buttons.
2. Touch the Dates button to select the date range for the report. The Date Range form will open.
3. Select the Start and End Date for the report
 - If you want the report to run for the entire business day, select Entire Business Day.
 - If not, de-select Entire Business day and enter Start and End Time.
4. Touch Ok button.
5. Touch the Run button. This report is available for a single gift card or all gift cards.
 - To run the report for a single card, go to Step 6.
 - To run the report for all gift cards, go to Step 7.
6. Touch Yes to run the report for a single card. You will be prompted to swipe the gift card. Swipe the card. The Gift Detail Report will run. Go to Step 8.
7. Touch No to run the report for all gift cards. The Gift Detail Report will run.
8. Touch the Print, Email or Save Report to File button.

Gift Card Program Summary Report

1. From an empty speed screen, Touch **Options, Reports, Customer Management, & Gift Card Summary Report**.
2. Touch **Dates** button.
3. Select a **Date Range** button.
4. Check entire business day or select a start time and end time.
5. Touch **Ok** button.
6. Touch **Run** button.
7. Select **Email Report, Print Report, or Save Report** button.

Gift Card Promotion Report

1. From an empty speed screen, Touch **Options, Reports, Customer Management, & Gift Card Promotion Report**.
2. Touch the Run button.
3. This report can include gift card details or no gift card details.
 - To run the report with gift card details, go to Step 4
 - To run the report without details, go to Step 5.
4. Touch **Yes** to run the report with gift card details. The Gift Card Promotional Report will run. Go to Step 6.
5. Touch No to run the report without gift card details. The Gift Card Promotion Report will run.
6. Select **Email Report, Print Report, or Save Report** button.

Showing Gift Card Summary Information on the Z-Report

1. From an empty speed screen, Touch **“Options”, “Admin”, “System Settings” & “Options Layout”** buttons.
2. Under Report Options, touch the Show Gift Card summary box and a checkmark will appear.
3. Touch **“Save”** button.