



2TouchPOS Gift Cards User's Guide

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About this Document

This document was written for 2TouchPOS version 3.03.5200.

Gift Cards Modes

There are two different gift card modes, local and multi-store program. The local program is used for one location, whereas multi-store program is used for owners with multiple sites and gift cards can be used at any site.

Standard Local Program

If the Local Program is selected, only gift cards activated at this location can be redeemed at this location. Local programs can be set up by the system administrator.

Promotional Gift Card Programs

These programs must be set up by 2TouchPOS and can only be used in the Local Gift Card Mode.

- **Scheduled Promotional** – This program is used for promotional gift card giveaways. Cards can be set to be active for a limited timeframe or on certain days.
- **Organizational Incentives** – This program allows the activation of cards that pay back companies/charities

Local Program Gift Card Mode

Gift Card Mode: Local Program

<Disabled>

Local Program

Multi-Store Program (Blank if gift cards never expire)

Administrative Fees

Administrative Fee:

Fees begin after: days of inactivity

Rekurs every: days

Last modified: 01/02/2014 12:41 By: AndyA

Save Cancel

- **Days to Expire:** The number of days after activation that a gift card will expire. Leave blank if gift card never expires.
- **Administrative Fee:** The amount to be deducted from the gift card balance due to inactivity.
- **Fees Begin After:** The Administrative Fee will be deducted from the gift card balance this number of days after inactivity.
- **Rekurs Every:** The re-occurring number of days the Administrative Fee will be deducted from the gift card balance due to inactivity.

Multi-Store Program

If the Multi-Store is selected, gift cards activated at any of the associated store locations can be redeemed at any of these locations using Enterprise Services. A monthly fee is charged for this service. Multi-Store program must be set up by 2TouchPOS.

Gift Card Mode: Local Program

<Disabled>

Local Program

Multi-Store Program (Blank if gift cards never expire)

Administrative Fees

Administrative Fee

Fees begin after days of inactivity

Recurs every days

Last modified: 01/02/2014 12:41 By: AndyA

Save Close

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.

The screenshot shows the 'Gift Card Settings' screen. At the top, the 'Gift Card Mode' dropdown menu is open, displaying three options: '<Disabled>', 'Local Program' (which is highlighted in blue), and 'Multi-Store Program'. To the right of the 'Multi-Store Program' option, there is a note: '(Blank if gift cards never expire)'. Below the dropdown menu, there is a section titled 'Administrative Fees' containing three input fields: 'Administrative Fee', 'Fees begin after' (followed by 'days of inactivity'), and 'Recurs every' (followed by 'days'). At the bottom left of the screen, it says 'Last modified: 01/02/2014 12:41 By: AndyA'. At the bottom right, there are two buttons: 'Save' and 'Cancel'.

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.

This screenshot shows the same 'Gift Card Settings' screen as the previous one, but with the 'Gift Card Settings' section highlighted in yellow. The 'Gift Card Mode' dropdown menu is now closed and shows 'Local Program'. The 'Gift Card Settings' section includes a 'Days to Expire' input field with a note '(Blank if gift cards never expire)', and the 'Administrative Fees' section with its three input fields. The 'Save' button at the bottom right is now highlighted with a red border. The text 'Last modified: 01/02/2014 12:41 By: AndyA' is visible at the bottom left.

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!

Gift Card Activation

Gift Card Type: Variable

Valid Till: 09/19/2014

Card Amount: 25.00

\$5 \$10 \$15 \$20 \$25 \$50 \$100

Loyalty Card

Card Number

Date Activated

Last Name

First Name

Phone #

Expiration Date:

View Details

Gift Card Rewards Loyalty Card Customer Account Save Cancel

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.

CARD: 15140118





Gift Card	
Card Balance	\$100.00
Date Activated	01/16/2014 12:03 PM
Expiration Date	NONE

Loyalty Card	
Pending Rewards	_____
Date Activated	_____

Customer Account	
Account Balance	_____
Membership Type	_____
Membership Discount	_____

Rewards Program	
Points Balance	_____
Date Activated	_____

Last Visit	
Date:	01/16/2014 12:03 PM

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.

CARD: 15140118

Gift Card		Loyalty Card	
Card Balance	\$100.00	Pending Rewards	_____
Date Activated	01/16/2014 12:03 PM	Date Activated	_____
Expiration Date	NONE		

Customer Account		Rewards Program	
Account Balance	_____	Points Balance	_____
Membership Type	_____	Date Activated	_____
Membership Discount	_____		

Last Visit	
Date:	01/16/2014 12:03 PM

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.

The screenshot shows a software interface for configuring payment options. On the left, a list of payment types is shown with checkboxes in the 'Enabled' column. 'Gift Card' is highlighted in green and has a checkmark. Below the list are up and down arrow buttons. The main area on the right is for 'Gift Card' configuration. It includes a yellow 'Enabled' button with a checkmark, a dropdown for 'Open cash drawer' set to 'Never', a checkbox for 'Reference Number Required' which is unchecked, and two input fields for 'Length - Min' and 'Max'. Below these is a dropdown for 'Payment Option' set to 'Cannot Exceed Balance'. At the bottom right, there are 'Save' and 'Cancel' buttons.

Payment Type	Enabled
Cash	<input checked="" type="checkbox"/>
Check	<input checked="" type="checkbox"/>
Coupon	<input checked="" type="checkbox"/>
Credit Card	<input checked="" type="checkbox"/>
Customer Account	<input checked="" type="checkbox"/>
Foreign Currency	<input checked="" type="checkbox"/>
Gift Card	<input checked="" type="checkbox"/>
Gift Certificate	<input checked="" type="checkbox"/>
Groupon	<input checked="" type="checkbox"/>
Membership Discount	<input checked="" type="checkbox"/>
Miscellaneous 3	<input checked="" type="checkbox"/>
Miscellaneous 4	<input checked="" type="checkbox"/>
Miscellaneous 5	<input checked="" type="checkbox"/>

Payment Description Gift Card

Enabled

Open cash drawer Never

Reference Number Required

Length - Min Max

Payment Option Cannot Exceed Balance

Save Cancel

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.



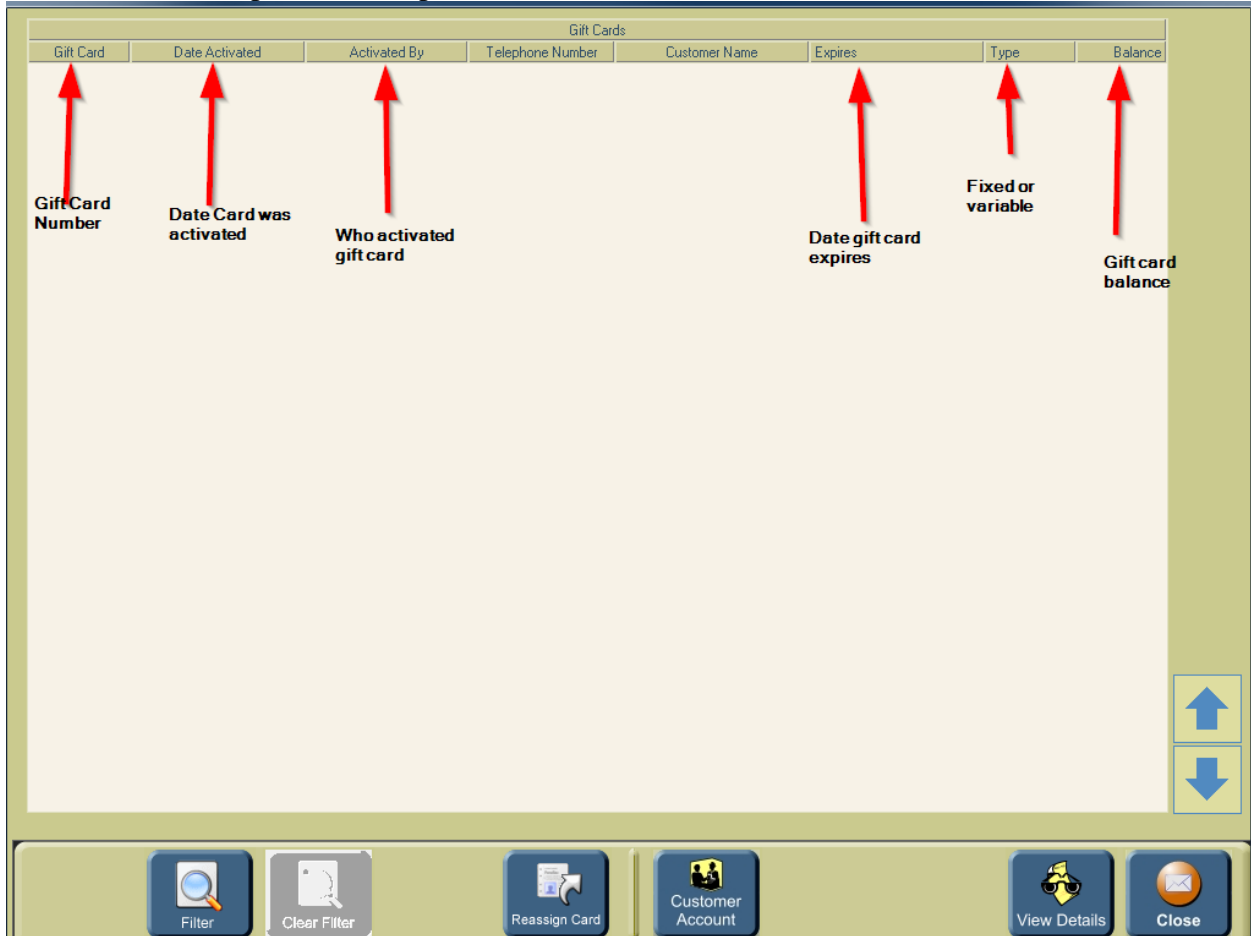
Figure 2

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.

Gift card filter

Last Name

First Name

Gift Card No

Phone #

Only With Balance Over \$0.00

Clear All Apply Cancel

& @ # \$ % / \ , ' " Backspace 7 8 9

Q W E R T Y U I O P Enter 4 5 6

A S D F G H J K L 1 2 3

Shift Z X C V B N M ◀ ▶ Space 0 .

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 Cards						
Gift Card Number	Date Activated	Activated By	Expires	Type	Balance	
015140118	2014-01-16 12:03:01 EST	Owner	NEVER	Variable	93.00	

Gift Card Summary						
Transaction Type	Transaction Date	Transaction Amount	UserID	Balance	Ticket Number	Site
Payment	2014-01-16 12:10:43 EST	-7.00	Owner	93.00	00100	BMB
Void Payment	2014-01-16 12:10:20 EST	7.00	Owner	100.00	00100	BMB
Payment	2014-01-16 12:09:29 EST	-7.00	Owner	93.00	00100	BMB
Activation	2014-01-16 12:03:01 EST	100.00	Owner	100.00	00106	BMB

Ticket Items Detail					
Date	Quantity	Item	UserID	Amount	
01/16/2014 12:10 PM	1	Burger	Bar Owner	6.00	
01/16/2014 12:10 PM	1	Sprite	Bar Owner	1.00	

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.

The screenshot displays a mobile application interface for a Gift Card Lookup form. At the top, the title "Gift Cards" is centered. Below the title is a table with the following columns: Gift Card, Date Activated, Activated By, Telephone Number, Customer Name, Expires, Type, and Balance. Red arrows point to the Gift Card, Date Card was activated, Who activated gift card, Date gift card expires, Fixed or variable, and Gift card balance columns. The table is currently empty. At the bottom of the screen, there is a navigation bar with several icons: Filter, Clear Filter, Reassign Card, Customer Account, View Details, and Close. On the right side of the table, there are two blue arrows pointing up and down, indicating scroll functionality.

Gift Card	Date Activated	Activated By	Telephone Number	Customer Name	Expires	Type	Balance
-----------	----------------	--------------	------------------	---------------	---------	------	---------

2. Touch the “**Filter**” button. The Gift Card Filter form will open.

Gift card filter

Last Name

First Name

Gift Card No

Phone #

Only With Balance Over \$0.00

Clear All Apply Cancel

& @ # \$ % / \ , ' " Backspace 7 8 9

Q W E R T Y U I O P Enter 4 5 6

A S D F G H J K L 1 2 3

Shift Z X C V B N M ◀ ▶ Space 0 .

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**” & “**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.

Please select date range for your report.

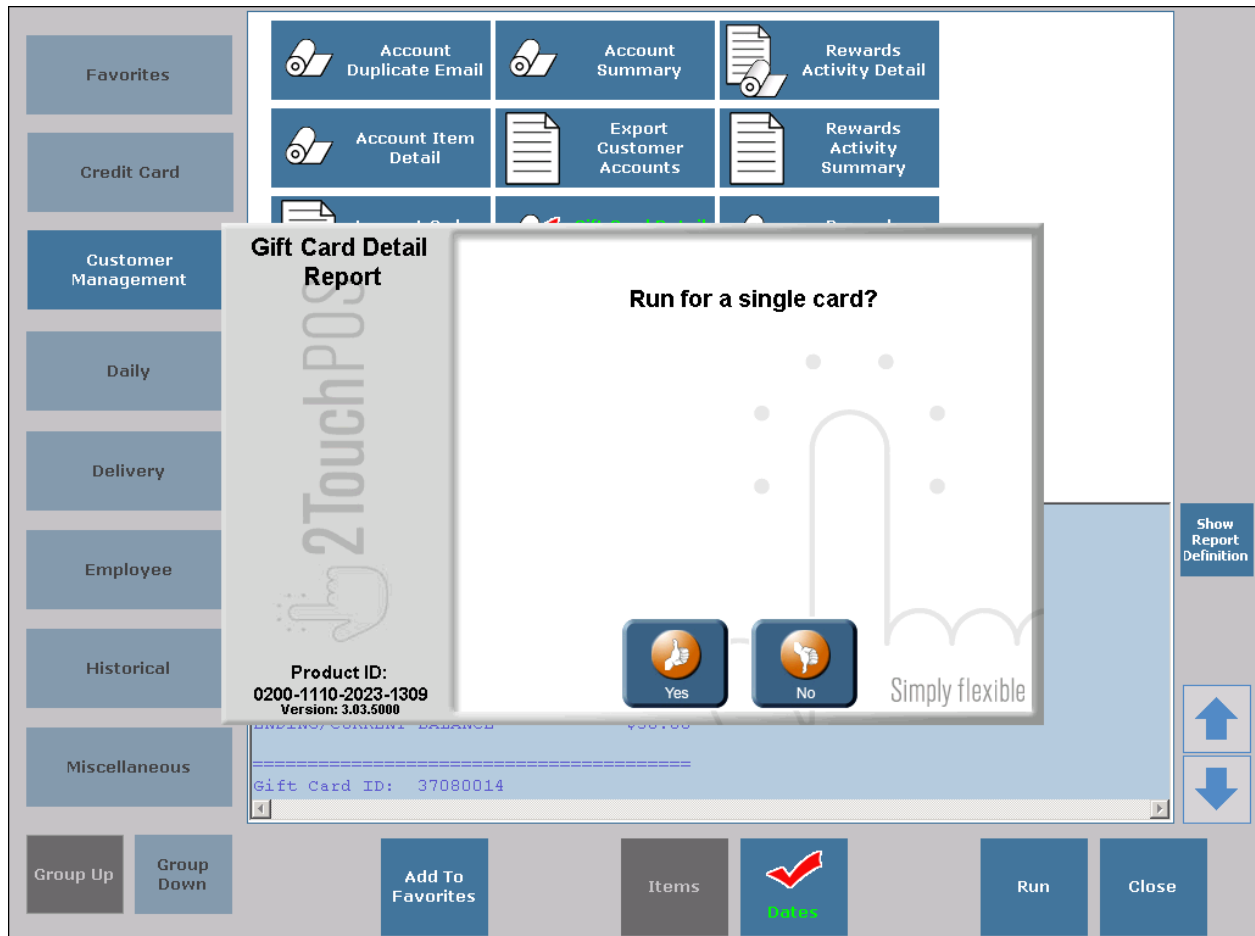
Start Date	End Date
01/01/2014	01/16/2014
<input checked="" type="checkbox"/> Entire business day	
Start Time	End Time

Custom Calendar

OK Cancel

&	@	#	\$	%	/	\	,	'	"	Backspace	7	8	9
Q	W	E	R	T	Y	U	I	O	P	Enter	4	5	6
A	S	D	F	G	H	J	K	L	1		2	3	
Shift	Z	X	C	V	B	N	M	◀	▶	Space	0	.	

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** buttons.

Gift Card Program Summary Report

1. From an empty speed screen, Touch **Options**, **Reports**, **Customer Management**, & **Gift Card Summary Report**.

SAMPLE REPORT				
CARD ID	ACTIVATD	EXPIRES	TYPE	VALUE
1500300017	08/11/03	01/01/02*	FIXD	\$1.50
1500300004	08/11/03	01/01/04	FIXD	\$10.00
2110300001	08/11/03	Never	VAR	\$22.00
Outstanding Cards:				\$33.50
*--Expired Card				
End of 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.

Please select date range for your report.


Start Date: End Date:

Entire business day


Start Time: End Time:



Custom Calendar



OK



Cancel

&	@	#	\$	%	/	\	,	'	"	Backspace	7	8	9
Q	W	E	R	T	Y	U	I	O	P	Enter	4	5	6
A	S	D	F	G	H	J	K	L	1		2	3	
Shift	Z	X	C	V	B	N	M	◀	▶	Space	0	.	

6. Touch **Run** button.
7. Select **Email Report**, **Print Report**, or **Save Report** buttons.

Gift Card Promotion Report

1. From an empty speed screen, Touch **Options, Reports, Customer Management, & Gift Card Promotion Report**.
2. Touch the “**Run**” button.



SAMPLE REPORT			
CARD NO	INCREASES	REDEEMED	BALANCE
Program: Lunch			
37080001	\$5.00	\$0.00	\$5.00
37080002	\$5.00	\$5.00	\$0.00
37080003	\$5.00	\$2.00	\$3.00
37080004	\$5.00	\$3.00	\$2.00

TOTALS:	\$20.00	\$10.00	\$10.00
Lunch Count: 4			
Program: Dinner			

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**” & “**Report Layout**” buttons.
2. Under Report Options, touch the Show Gift Card summary box and a checkmark will appear.
3. Touch “**Save**” button.

The screenshot displays the 'Z Report' configuration interface. On the left, the 'Report Types' dropdown is set to 'Z Report'. Under 'Z Report Options', 'Sequentially number' is checked, and 'Printer' is set to '<Local Wide Printer>'. The 'Print Style' is 'Single Column'. In the 'Report Options (1 of 2)' section, 'Show Gift Card Summary' is checked and highlighted with a red box. Other options like 'Show Sales By Category' and 'Show Sales Summary' are also checked. At the bottom, the 'Save' button is highlighted with a red box. On the right, a 'Sample Report' is shown, including sections for 'CREDIT CARD SUMMARY', 'CUSTOMER ACCOUNT SUMMARY', 'LABOR SUMMARY', and 'GIFT CARD SUMMARY'. The 'GIFT CARD SUMMARY' section shows starting amounts of \$394.70, activations of \$80.00, and redemptions of \$24.00.

CREDIT CARD SUMMARY		
Credit Card For Sales	5.86	100.00%
Credit Card Credits	0.00	0.00%
TOTAL CREDIT CARD	5.86	100.00%
CREDIT CARD TOTALS BY TYPE		
1 Mastercard	5.86	
CUSTOMER ACCOUNT SUMMARY		
Item Sales	15.00	
Payments Received		
- Cash	25.00	100.00%
TOTAL CUSTOMER ACCT	25.00	100.00%
LABOR SUMMARY		
% Sales	11.9	
Total Labor Cost	29.12	
Total Labor Hours	126.6	
GIFT CARD SUMMARY		
Starting Amounts	41	\$394.70
Activations/Increases		
Cash	2	\$40.00
Credit Card	1	\$40.00
Total Act/Inc	3	\$80.00
Redemptions	2	\$24.00