



**GIFT CARD**

Version 5.53.00

## Introduction

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### Overview

#### What Profitek Gift Card Does?

The Profitek Gift Card program will allow you to offer your customers a way of purchasing gift certificates and cash cards. These cash cards can be refilled so that the customer does not have to carry cash in order to purchase product from you. You would just sell them a gift card and they would just provide this whenever they want to purchase something then the purchase amount would be deducted from the balance remaining on the card. If the card value drops to zero the customer can then recharge the card with any amount that they wish to put on it.

### Conventions used in this book

The following conventions are used in the book

#### Icons and Alerts

Special graphic symbols are used in this manual to alert you to important points. The following icons are used.



Points to a section of the manual that may save you time or trouble.



Used to highlight special points of interest



Points to a more detailed discussion on this topic either somewhere else in this manual or in another manual



Warning, this function must be used with extra care

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## Function Menu

This chapter will explain how you control all aspects of the actual gift card program itself. From creating the Gift card, activating, recharging, deactivating and deleting.

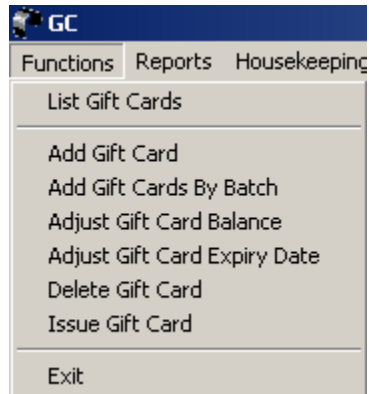


Figure 1

In order to use gift card you must be assigned the appropriate security, this is done through the Security in the Restaurant management system.

## List Gift Cards

Listing the gift cards allows you to see all of your gift cards or a specific range or even an individual card.

To list the all the gift cards just open the function menu and select “List Gift Cards” and the following screen will appear.

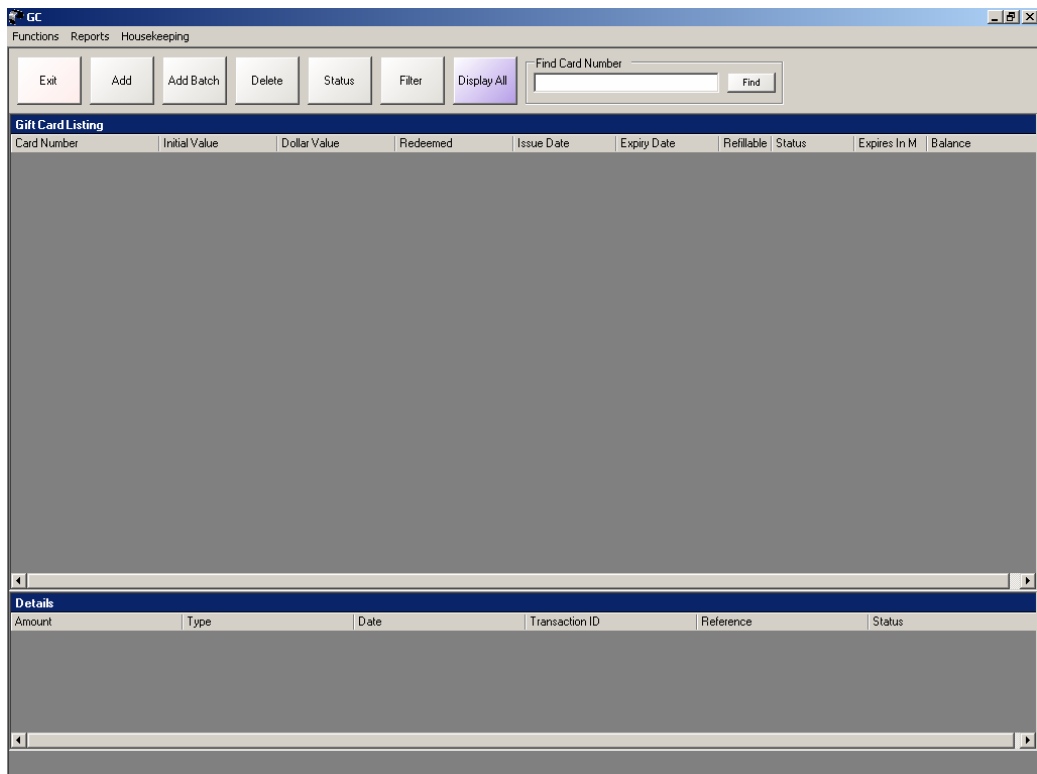


Figure 2

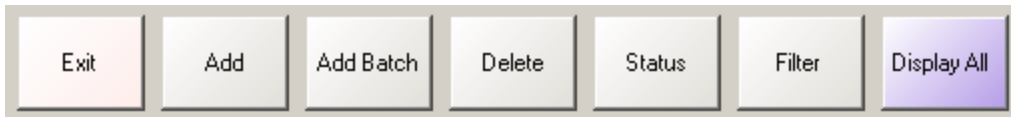


By default no gift cards are listed as you may have a very large number of them. To display all of the gift cards just press the Display All button and your gift cards will be displayed sorted by the gift card number. To change the sorting order just click on the column header, for example to sort by expiry date just click on the "Expiry Date" header and the gift cards will be sorted by expiry date in ascending order; to change to descending order just click the same header again.

If you are looking for a specific gift card you can just place the cursor in the find gift card search box and then either swipe the customer's gift card or manually type in the gift card and click the find button. If you swipe the customer's card it will automatically be displayed on your screen.

Once you have your gift card(s) listed you can then do several things to those gift cards depending on which button you press. You can either Deleted the current gift card if you have one highlighted or you can change the status of the currently highlighted card. Please see the sections below for more detailed information on either of these functions.

### Functions available in "List Gift Cards":



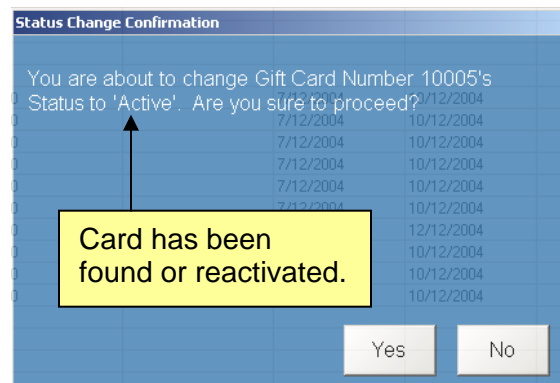
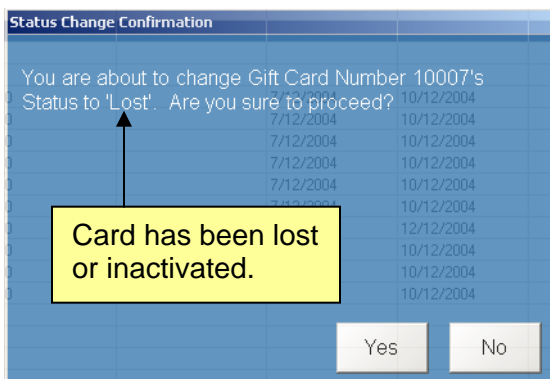
**Exit:** Exit the "List Gift Cards" Function

**Add:** Add a new gift card. Calls up the function "Add Gift Card". Details provided later.

**Add Batch:** Add new gift cards by batch. Calls up the function "Add Gift Cards By Batch". Details provided later.

**Delete:** Delete a gift card or a range of gift cards. Calls up the function "Delete Gift Card". Details provided later.

**Status:** Changes the status of a gift card from **active** to **lost** and vice versa. Highlight a gift card and press *Status*. The following screen will pop up and you will be prompted to proceed in changing the gift card's status.





Filter: Filter gift cards to be displayed according to their initial values, issued date, and status. Check option(s) to filter.

**Filter Options**

Initial Value

Issue Date From

Issue Date To

Status

Display Cancel

Display All: Display all gift cards and their details. Details of a highlighted gift card are shown below.

GC Functions Reports Housekeeping

Exit Add Add Batch Delete Status Filter **Display All** Find Card Number  Find

**Gift Card Listing - 29 Displayed**

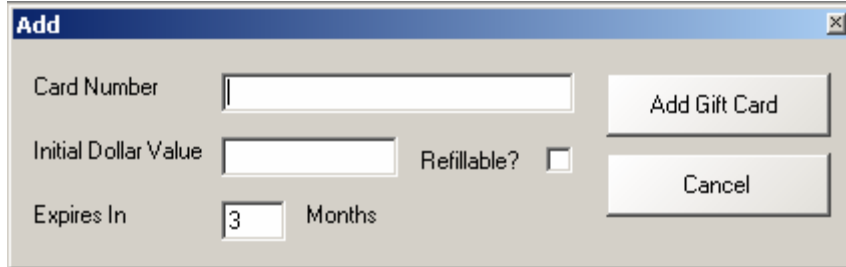
Card Number	Initial Value	Dollar Value	Redeemed	Issue Date	Expiry Date	Refillable	Status	Expires In M	Balance
10001	\$100.00	\$100.00		7/12/2004		<input checked="" type="checkbox"/>	Active		\$100.00
10002	\$100.00					<input checked="" type="checkbox"/>	Active	6	\$0.00
10003	\$100.00					<input checked="" type="checkbox"/>	Active	6	\$0.00
10004	\$100.00					<input checked="" type="checkbox"/>	Active	6	\$0.00
10005	\$100.00					<input checked="" type="checkbox"/>	Lost	6	\$0.00
10006	\$100.00					<input checked="" type="checkbox"/>	Active	6	\$0.00
10007	\$100.00					<input checked="" type="checkbox"/>	Active	6	\$0.00
10008	\$100.00					<input checked="" type="checkbox"/>	Active	6	\$0.00
10009	\$100.00					<input checked="" type="checkbox"/>	Active	6	\$0.00
1001	\$10.00	\$10.00		7/12/2004	10/12/2004	<input checked="" type="checkbox"/>	Active	3	\$10.00
10010	\$10.00	\$10.00		7/12/2004	10/12/2004	<input checked="" type="checkbox"/>	Active	3	\$10.00
1002	\$10.00	\$10.00		7/12/2004	10/12/2004	<input checked="" type="checkbox"/>	Active	3	\$10.00
1003	\$10.00	\$10.00		7/12/2004	10/12/2004	<input checked="" type="checkbox"/>	Active	3	\$10.00
1004	\$10.00	\$10.00		7/12/2004	10/12/2004	<input checked="" type="checkbox"/>	Active	3	\$10.00
1005	\$10.00	\$10.00		7/12/2004	10/12/2004	<input checked="" type="checkbox"/>	Active	3	\$10.00
<b>1006</b>	<b>\$10.00</b>	<b>\$10.00</b>		<b>7/12/2004</b>	<b>12/12/2004</b>	<input checked="" type="checkbox"/>	Active	3	<b>\$10.00</b>
1007	\$10.00	\$10.00		7/12/2004	10/12/2004	<input checked="" type="checkbox"/>	Active	3	\$10.00
1008	\$10.00	\$10.00		7/12/2004	10/12/2004	<input checked="" type="checkbox"/>	Active	3	\$10.00
1009	\$10.00	\$10.00		7/12/2004	10/12/2004	<input checked="" type="checkbox"/>	Active	3	\$10.00
1501	\$15.00					<input checked="" type="checkbox"/>	Active	3	\$0.00
1502	\$15.00					<input checked="" type="checkbox"/>	Active	3	\$0.00
1503	\$15.00					<input checked="" type="checkbox"/>	Active	3	\$0.00
1504	\$15.00					<input checked="" type="checkbox"/>	Active	3	\$0.00
1505	\$15.00					<input checked="" type="checkbox"/>	Active	3	\$0.00
2001	\$20.00					<input checked="" type="checkbox"/>	Active	3	\$0.00
2002	\$20.00					<input checked="" type="checkbox"/>	Active	3	\$0.00

**Details for Card Number 1006**

Amount	Type	Date	Transaction ID	Reference	Status
\$10.00	IssueCard	7/12/2004		GC	
\$5.00	Adjustment	7/12/2004		GC	
(\$5.00)	Adjustment	7/12/2004		GC	

## Add gift card

This function is used to add a single gift card to the system. A gift card can be added at any time and will not function until it is activated. You can add as many gift cards as you want and activate them at a later date.



To add a new card just select either the Add button on the top of the screen or select the Function menu and click on the “Add Gift Card” menu. When the above screen shows up you can either manually type in the card and other information or if you have the card you can just swipe it in the card number field. Please make sure that the cursor is currently inside the “Card Number” field or it will not work properly. You can also define an Initial Dollar value for this card; if you do assign a dollar value for this card then you will NOT be able to change it when you issue the card.

If you want the customer to be able to recharge or refill the card then you must check off the refillable check box. When you want to create gift cards with a time limit for redemption, you would set the number of months the card is valid for in the following box:



. For example, a gift card of \$10 value is good for a time period of three months. It will be expired three months after the issued date of the card as shown below:

Card Number	Initial Value	Dollar Value	Redeemed	Issue Date	Expiry Date
1001	\$10.00	\$10.00		7/12/2004	10/12/2004

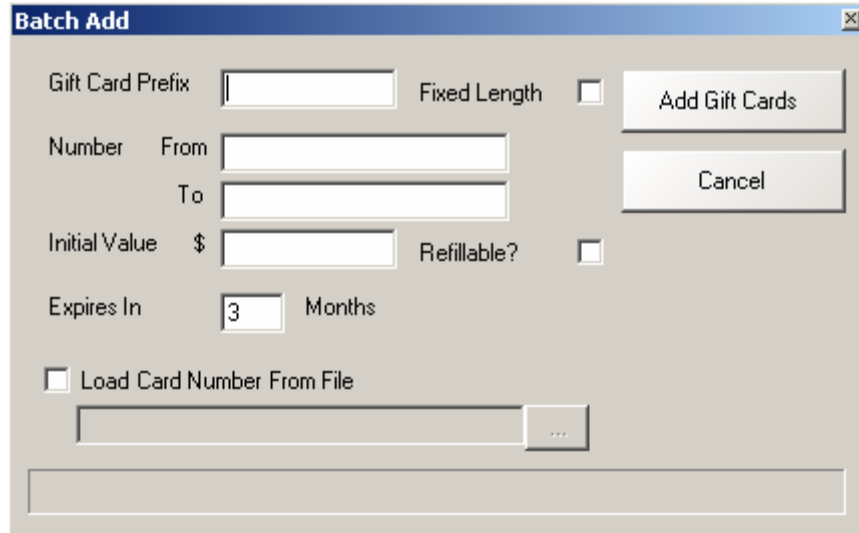
Please note that the default number of months till expiration is 3; if there is no expiry date for a gift card, leave the box blank.




If you were going to be using the gift card as a gift certificate solution then you would want to make sure that the refillable checkbox is turned off and the expiry date is set. Most gift certificates are valid for a specific time period after purchase. IE: 1 year from date of purchase.

## Add gift card by batch

This function allows you create gift cards in larger quantities. All you need to do is specify the range and it will automatically create them for you. This could be used to create your initial batch of cards or a group of cards specifically for a large customer,



Once you select the “Add Gift Cards by Batch” menu option from the Function menu

 Add Batch

or if you have the “List Gift Cards” screen up you can click the “Add Batch” Button.

**Gift Card Prefix** This field is used when you want the cards to start with a special Sequence, either leading zeros or alphabetic. For example if you wanted every card to start with ‘000’ then you would put that into the prefix field. If you wanted the cards to start with ‘ABC’ then you would put that into the prefix field.

**Fixed Length** If selected then all cards will use the same number of digits for the card number. For example if you generated cards from 1 to 100 and the fixed length was checked off then all cards would be 3 characters long, 001,002, 003 ... 100 instead of 1,2,3, ... 100.

**Number from** Can be numeric value only. Starting number for the sequence of cards that you are generating, leading zeros will not be added to the number during generation you must use the prefix field to have this happen

**Number To** Numeric Value only, ending number of the sequence of gift cards that you are creating, it must be a larger number then the number in the from field.



- Initial Value** This is where you would set the value of the Gift card or if you leave it at 0.00 then it will be definable when you sell the gift card. This gives more flexibility to allow you customers to decide how much they want the card to be.
- Refillable** If you want the customer to be able to put more money on the gift card after the initial value is depleted down to zero then you must check off this box.
- Expires In** This is the number of months in which the gift card will expire. If the gift cards do not expire, leave this box blank.

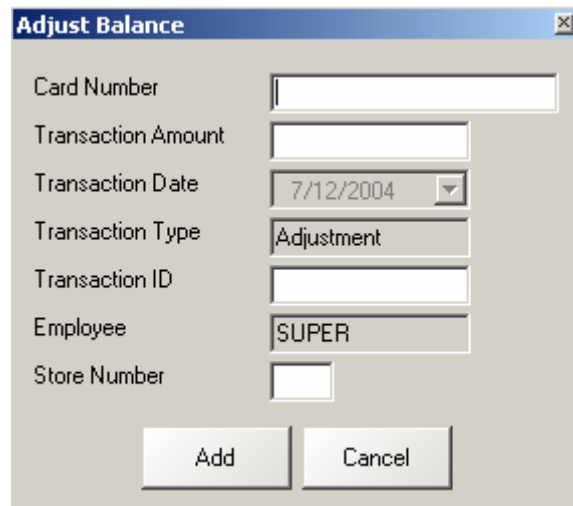


Also available is the ability to import the card numbers from a external source, depending on where you get your gift cards produced; the supplier may provide you with a file that includes all of the card numbers. If this is the case then simply select the *Load Card Numbers From File* option and use the search box to find the file. The file must be in ASCII format for our system to import it properly. If it is not in this format you will need to convert the file first, this can be done with most software programs, you just need to re-save it as a TXT file.

## Adjust gift card balance

This allows you to change the dollar balance on a card by either increasing (Positive Number) or decreasing (Negative Number)

Once you select the “Adjust Gift Card Balance” from the Function Menu you will see the following displayed on the screen.



**Card Number** The Card Number of the Gift Card or Gift Certificate that you are issuing. Normally the card is swiped in a card reader to acquire the number.

**Transaction Amount** This is the dollar amount that you are changing the gift card by, either a positive number for increasing the amount or a negative number if you are decreasing the amount.

**Transaction Date** This is today's date and cannot be changed. This is for your reference only.

**Transaction Type** Whenever changes are made from within the Gift card program they are tracked as “Adjustments”. This is a view only field and cannot be changed.

**Transaction ID** This is a manual input of the transaction number that occurred at the store level as point of reference. If no transaction was done and you are promoting the Gift card you can use any transaction number you like.



Employee ID

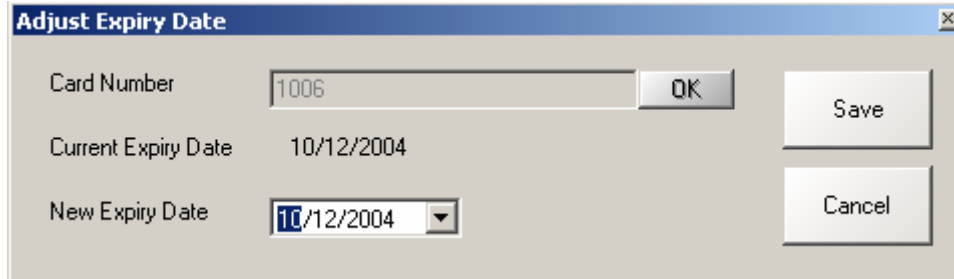
This information is displayed based on who logged into the gift card manager program and cannot be manually changed.

Store Number

This is the store that requested the gift card balance change. If you have multiple stores then it would allow you to track each of the stores to find out who was requesting these manual changes.

## Adjust gift card expiry date

This allows you to change the expiry date issued to a card by assigning a new expiry date. If a customer has purchased a gift card and wishes to add more values to it later on; the expiry date can be adjusted using this function.



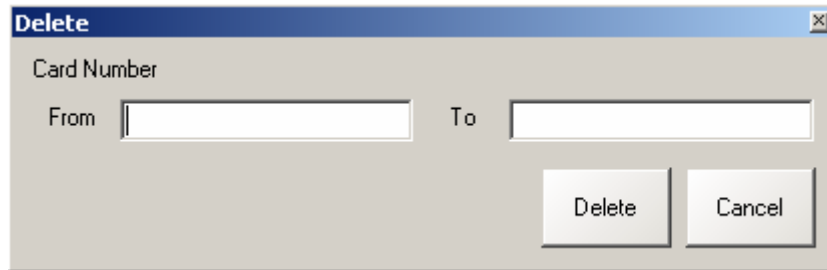
Card Number	1006	OK	Save
Current Expiry Date	10/12/2004		
New Expiry Date	10/12/2004		
			Cancel

Highlight the gift card whose expiry date needs to be adjusted and then press *Adjust Gift Card Expiry Date*. Key in a new expiry date or select from the pull down calendar provided. Press *Save* and a new expiry date is assigned.

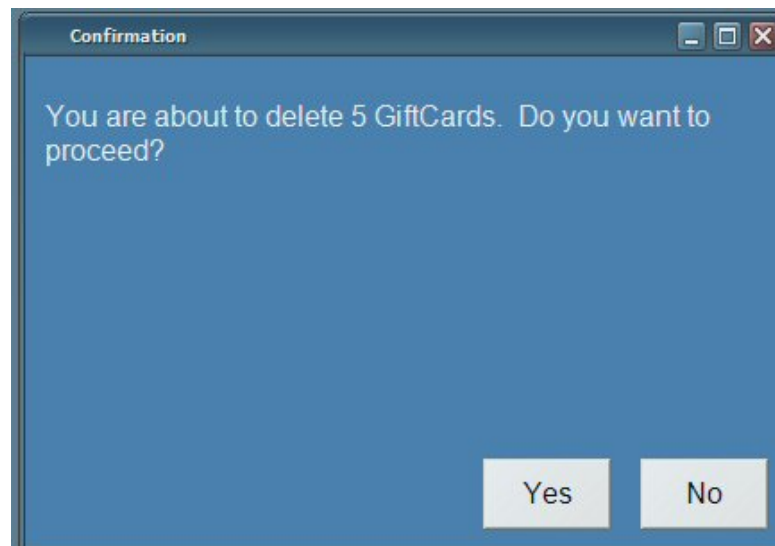
## Delete Gift card

This will allow you to delete any zero balance Gift card.

To delete a gift card you can highlight it from the gift card listing screen and press the delete button on the top of the screen or you can select the function menu and select the delete gift card option.



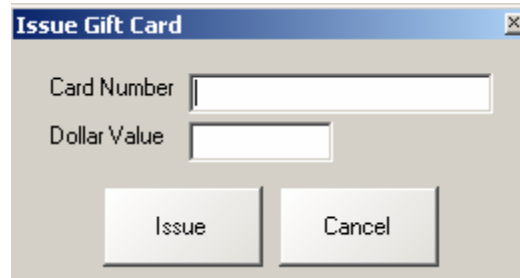
The above screen will be displayed, if you have highlighted a gift card from the gift card listing the software will automatically fill in the “From” and “To” fields for you with the number from the highlighted gift card. If you wish to change the values then just highlight either the “from” or “to” field and overwrite the existing value with the new value. If you are deleting more than one gift card a secondary screen will display saying that “You are about to delete xx gift cards” do you wish to continue. If you are deleting a single gift card it will just be deleted without a warning.



Deleting Gift cards is permanent; please make sure that you have a backup of your data. Not only will the gift card be removed from the system but all transaction detail(s) pertaining to this card will also be deleted.

## Issue Gift card

Before any gift card can be used, you must activate the card. This function controls the loss or theft of a gift card(s). Even if you pre-charge a card in the back office with a dollar amount it cannot be used until it is either activated (by selling) in the Restaurant Management for Windows© or Retail Sales for Windows© front end system or manually issuing in the Gift card Manager Program.



**Card Number** The Card Number of the Gift Card or Gift Certificate that you are issuing. Normally the card is swiped in a card reader to acquire the number.

**Dollar Value** The amount of Money the customer is applying to the Gift Card

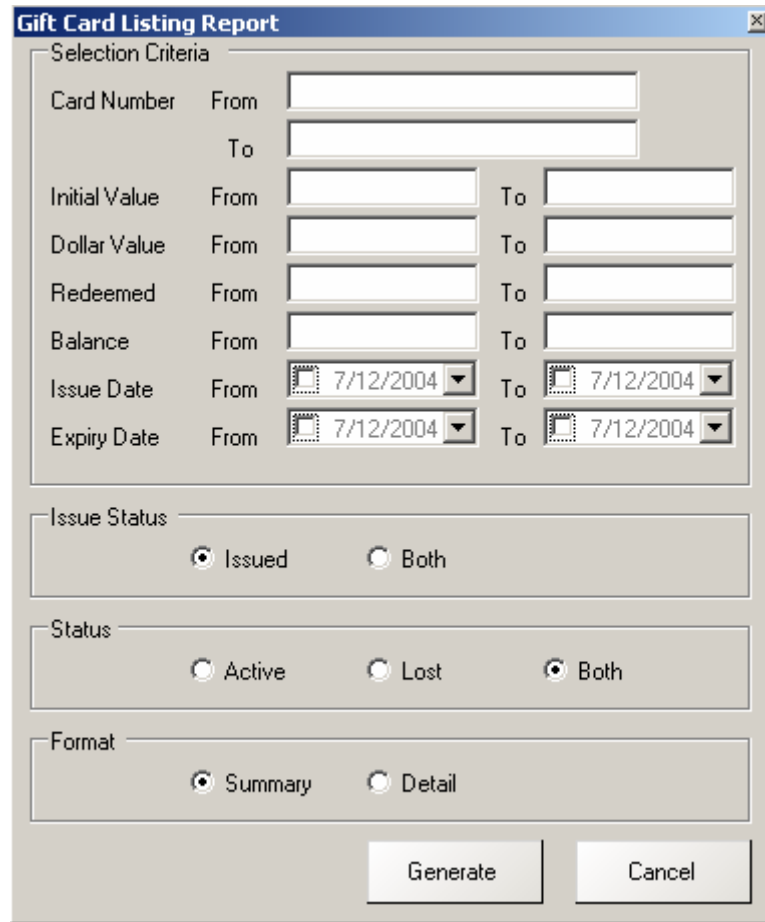
It is not recommended to issue Gift Cards from the Gift card Manager Program as balancing your tender will be more difficult to do. This would normally only be done if you have issued a gift card and the Gift Card information record did not get updated properly to the Gift Card Server.

## Report Menu

This function will allow you to print reports on your gift cards. Examples of these reports can be found in Appendix A.

### Gift card Listing

The Gift card listing report will show all cards that have been created in the Gift Card Management Program. It will also show you the total balance of all gift cards that have been issued.



To see an example of these reports see Appendix A

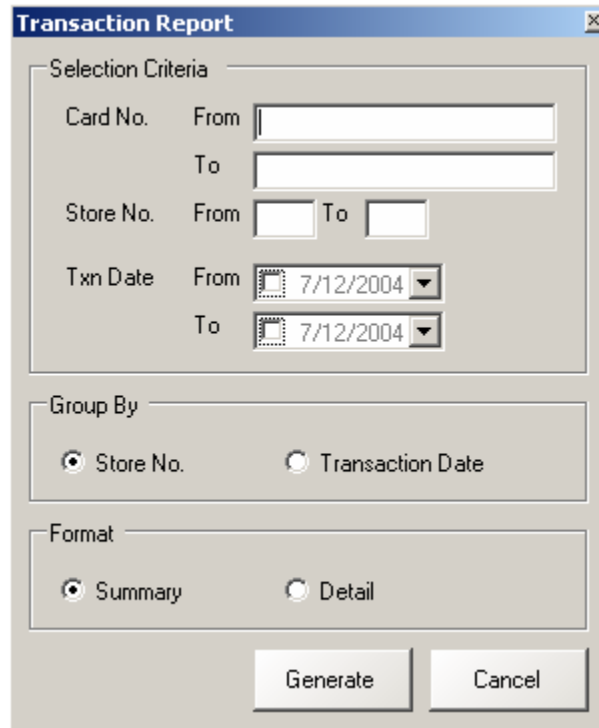
Card Number	Numeric Card number	This is where you would enter your Range of Card Numbers that you wish to view. If you want all cards to show up then leave these two fields Blank
Initial Value	Dollar Amount	Enter in the Initial value of the cards when they were created. If you want all initial values then leave these two fields blank
Dollar Value	Dollar Figure	Dollar value on Issuance.
Redeemed	Dollar Figure	Redeemed Amount
Balance	Dollar Figure	Current balance remaining on the card. For all balances leave both fields blank
Issue Date	Date MM/DD/YYYY	Date the Card was Issued.
Expiry Date	Date MM/DD/YYYY	Date the Card was/will be expired.
Issue Status	Issued, Both	Select to view Issued Cards only or All Cards.



Status	Active, Lost, Both	Select to view active cards only, lost cards only, or both active ones and lost ones (all cards).
Format	Summary, Detail	Select to view summarized format or detailed format.

## Transaction Report

The Transaction report will list all information that has happened on a single card or series of cards. This information is useful to find out not only how many cards are being used but also how often they are used. It can also help show the customer what the balance of their card is and how often it was used.



**Transaction Report**

Selection Criteria

Card No. From   
To

Store No. From  To

Txn Date From   
To

Group By

Store No.  Transaction Date

Format

Summary  Detail

Generate Cancel

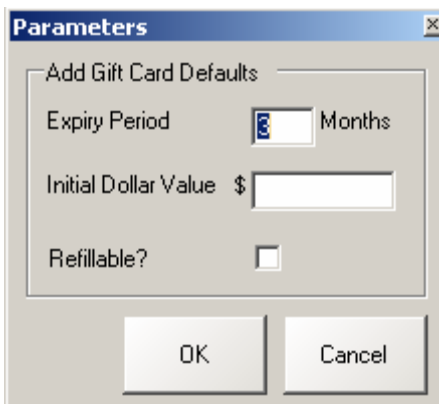
Card Number	Numeric Card Number	This is where you would enter your Range of Card Numbers that you wish to view. If you want all cards to show up then leave these two fields Blank
Store Number	Numeric Store Number	Only used in a multi-store location setup. If you have only one location you can either enter store '0' or leave it blank
Transaction Date	Date MM/DD/YYYY	The date range that the transactions took place. Leave unchecked if you want entire date range
Group By		This sets how you want the report sorted either by store number or by the transaction date.
Format		Either just a summary report (Totals "Group by") together on a single line or detail which will print every transaction for every day.

## Housekeeping Menu

The housekeeping section of the Gift Card Manager allows you to change how the system responds; you can control the security, default Parameters, User Access control.

### Parameters

This is where you set the system to control the default settings on all new Gift Cards that are created. You can select how long the card will be active, if it can be refilled / recharged at all and the Initial Dollar Value if want to put one in.



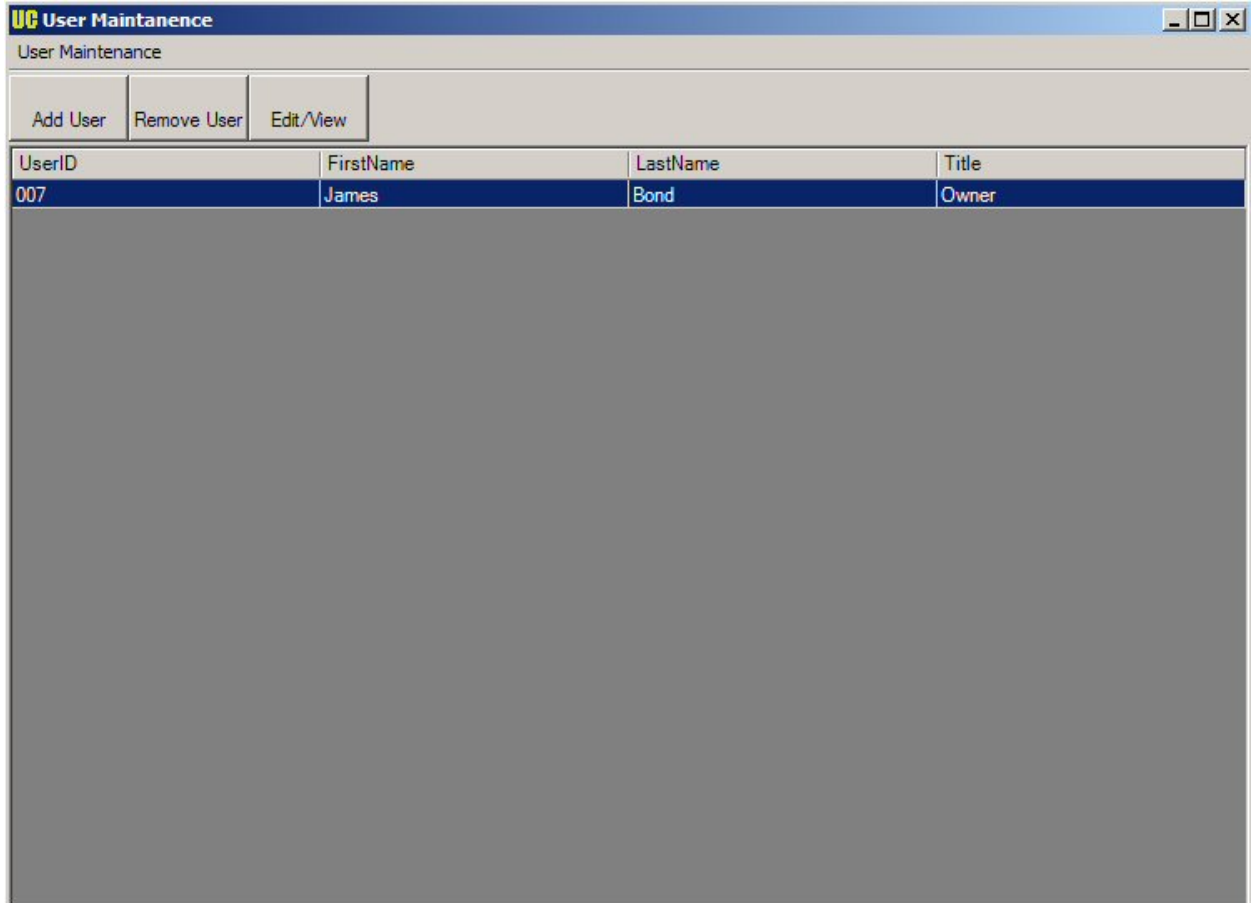
Expiry Period	The default expiry date when creating new cards. Enter the value in the number of months that you want the card to remain active. Leave blank if card never expires.
Initial Dollar Value	The Default Dollar Value of the Gift Card when creating new cards. Left blank will create new cards with a zero value.
Refillable	The default for all new Cards created. If checked off then all cards by default will be refillable cards.

All default values in this screen will be put into the same fields in the “Add Gift card” or “Add Gift Card By Batch” functions. Those values can be changed when adding new gift cards.

## Users Setup

This is where you would setup new users or modify security settings on what each person has access to. This works in conjunction with the “Security Setup” function in the housekeeping. This module will allow you control the users access to not only to the Gift Card Manager but if you have other Profitek© modules you will be able to either grant or deny access to the system or limit the security of what they can do in each of the modules.

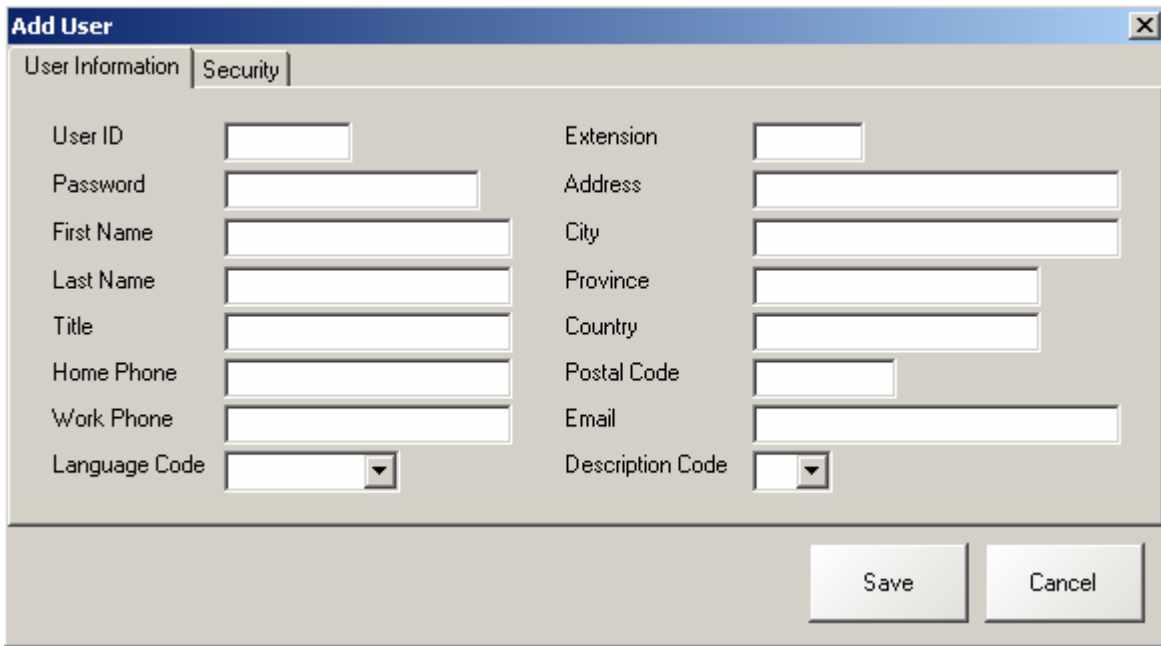
When selected and if you have enough access rights the following screen will show up. From here you can Add, change or delete users from the system.



### Add User

Adding users to the system is very simple you just need to fill out some user information and set the security level for the user.

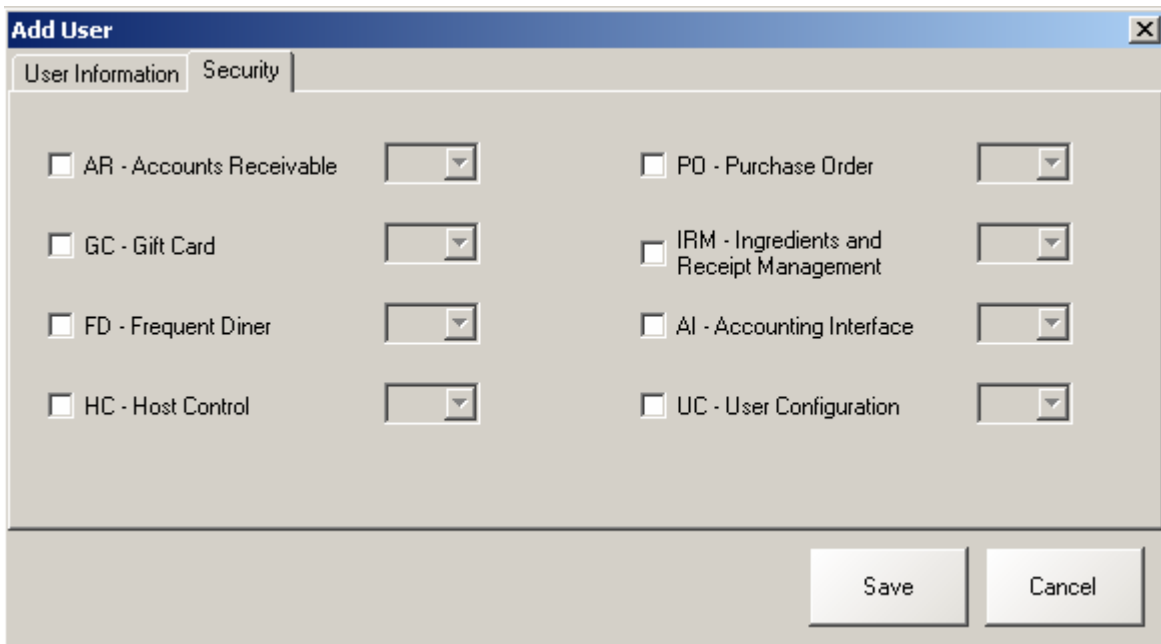
The following screen displays the input screen for User Information:



Fill in the information for User ID, first name, last name, a password Language code, and a display code. These fields are required while other information like Address, title, phone numbers and email address are optional. If you are familiar with the RMW or RSW system, you should be familiar with the Language and Description Code. The Language Code prompts you for a choice of English, Traditional Chinese, or Simplified Chinese. The Description Code prompts you for description in your first choice of language (01, usually English) or your second choice of language (02, usually Chinese).

After you have entered the user information, you will have to set the security level for the user.

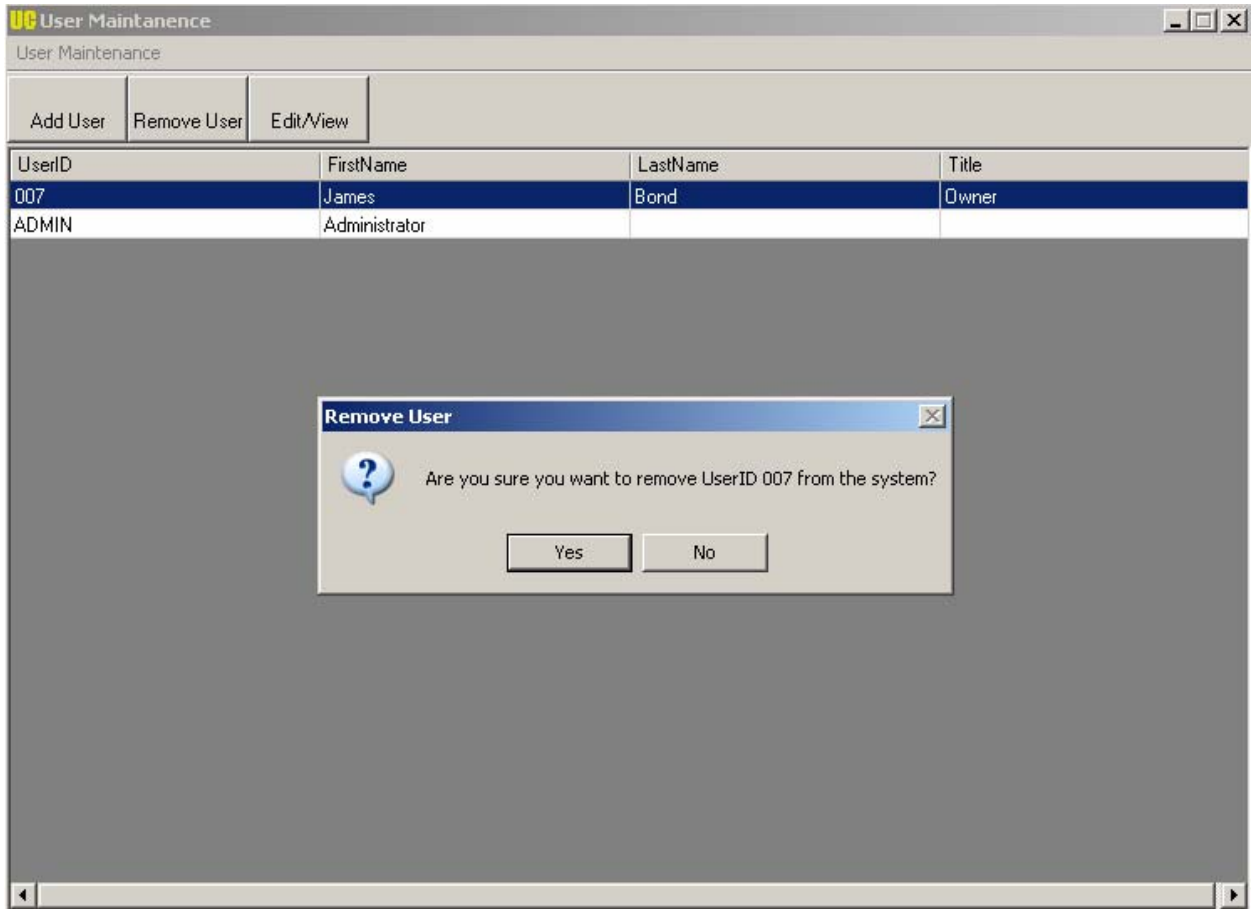
The following screen displays the input screen for Security:



Select which system(s) you want to allow the user to access and what security level they have within that system. For example, if you give a user full administrator rights and access to the Gift Card system, you would check the box beside GC – Gift Card, and select '9' from the pull down menu as follows:  GC - Gift Card 9

## Remove User

To remove a user from the system, highlight the user and press the *Remove* button. You will then be prompted for confirmation. Press *Yes* to delete the selected user, *No* to cancel.

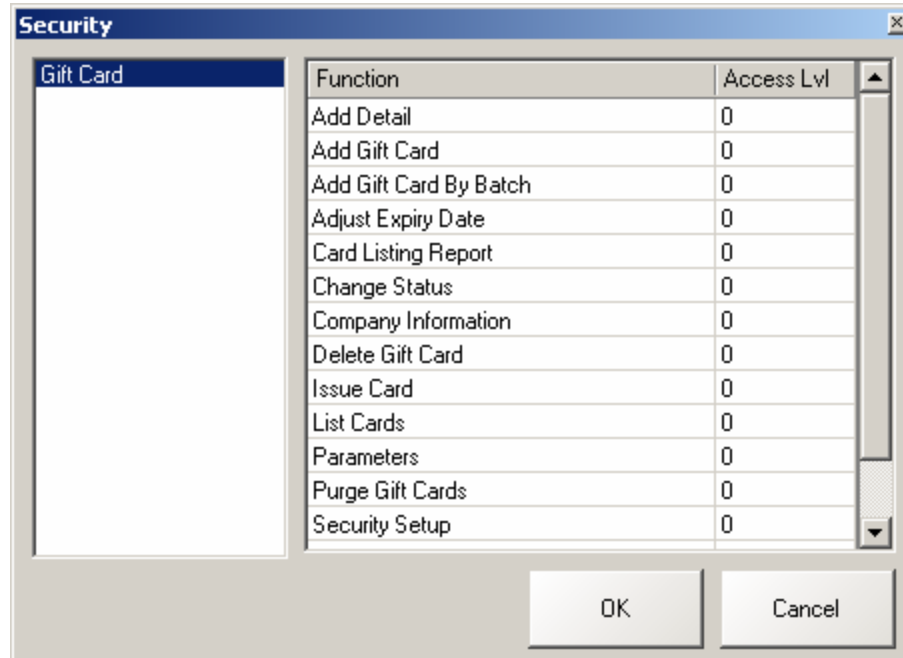


## Edit / View User

Press to edit or view user information and security setup.

## Security Setup

This is where you can control what each user that has access to the Gift Card Manager Program can do. IE: if you want some people be able to print reports only, you can setup the security such that report printing has a lower security level compared to other functions. This means set all other functions to a higher number so that other users do not have access to them except to printing reports.



### Security Table

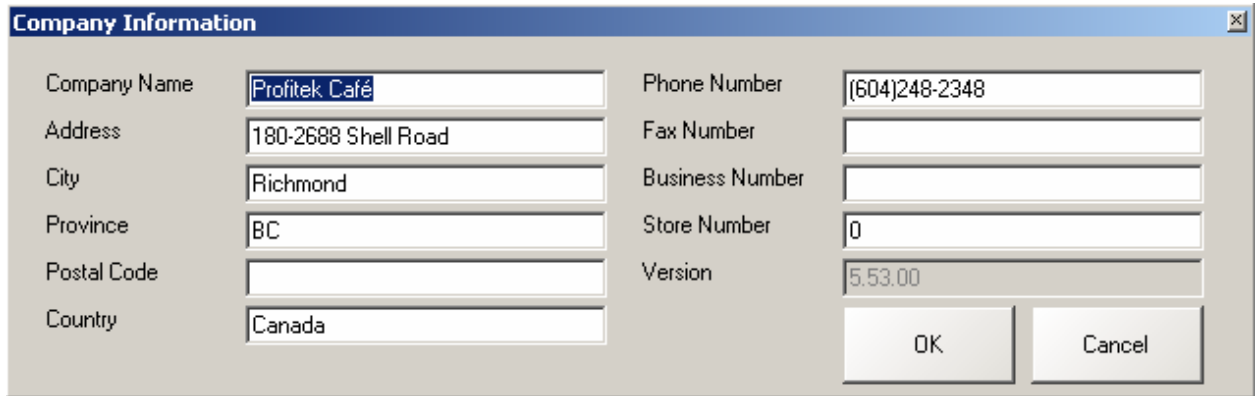
Security Name	Description	Default Recommended Level
Add Detail	Minimum Level for being able to add details to a gift card	1
Add Gift Card	Minimum Level for being able to add a single gift card	1
Add Gift Card By Batch	Minimum Level for being able to add batches of gift cards	1
Adjust Expiry Date	Minimum Level for being able to adjust a gift card's expiry date	9
Card Listing Report	Minimum Security for Print Gift Card Listing Report	1
Change Status	Minimum Level for Changing the Status from Active to Lost	1
Company Information	Minimum Level for Changing Company Information	9
Delete Gift Card	Minimum Level for Deleting Gift Cards	9
Issue Card	Minimum Level for Issuing Gift Cards	9
List Cards	Minimum Level for Listing Gift Cards	1
Parameters	Minimum Level for adjusting the defaults parameters for adding Gift Cards	9
Purge Gift Cards	Minimum Level for Purging Gift Cards	9



Security Setup	Minimum Level for Accessing the Security Setup	9
Transaction Report	Minimum Level for Print Gift Card Transaction Report	1
Users Setup	Minimum Level for Accessing Users Setup	9

## Company Setup

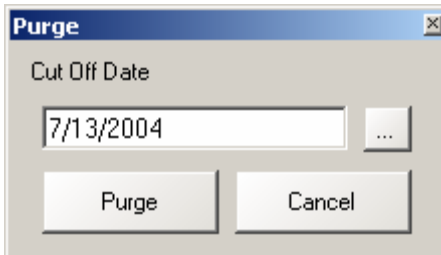
This information is setup during the initial install of the software and cannot be changed as it is directly tied to the Serial number of the software. If you need to make changes to the company setup information you will need to call your Profitek© sales representative to have this done.




Company Information	
Company Name	Profitek Café
Address	180-2688 Shell Road
City	Richmond
Province	BC
Postal Code	
Country	Canada
Phone Number	(604)248-2348
Fax Number	
Business Number	
Store Number	0
Version	5.53.00
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

## Purge Gift cards

Purging gift cards will allow you to keep your database files at a manageable level. What this does is allow you to erase or delete transaction information that happens in your system over the process of time. You just have to select the cut off date and any transactions that happened before the selected date will be removed from the system. This is usually only done after you have completed your fiscal year end process. You also might want to make sure that you have a good data backup before doing this as it is a non reversible process.



Press  to select from a calendar for the Cut Off Date. Press Purge to proceed or Cancel to exit function.