Anthology, Inc.

How to Use the Visual Anthology In-House Giftcard Module

The optional add-on module for "Anthology In-House giftcards" will enable you to sell, accept, and maintain your own in-house gift cards where your system tracks the balances. If you would like more information on this module contact Jim@anthologysoftware.com or contact Jim in sales at 800392-1726.

Please note that to sell and accept In-House gift cards, the module must first be enabled by an Anthology technician. You must also have created a Tender of the In-House gift card type.

The main functions are as follows.

NOTE: If you use the Element Payment Services system for credit cards, gift cards should not be swiped using the encrypted credit card swiper as this will render the card number unusable. Use the barcode scanner on the back of the card or manually key in the card number instead.

To activate a card:

1) Go to Cash Register, Actions, Gift Cards, Activate.
2) Scan the number of the card you want to activate into the Card Number field.
3) Press <Enter> or <Tab> to move to the Amount field and enter the face value of the card.
4) Press F12
5) The Activation charge will be added as a line item to the Sale. It can be combined with any other Sale, Return, or other line items.

Note that the card will not actually be Activated until payment has been received and the transaction completed.

To accept a card as payment:

1) At the completion of the sale, select the In-House gift card tender type.
2) A field will appear allowing you to scan in the card's number
3) When the transaction is completed, the amount of the sale will be deducted from the gift card balance.

4) If the card's balance is not sufficient to cover the Total Due, you may select another payment type as well.

To check a card's balance:

1) Go to Cash Register, Actions, Gift Cards and select Check Balance.
2) Scan or enter the number of the card whose balance you want to check
3) The balance will be shown on screen; you can also print a receipt showing the balance on the receipt printer

To cancel a gift card transaction:

1) The simplest way to cancel a gift card transaction is to Void the sale that contained it. As with other Visual Anthology Voids, this can only be done before the Ztape for the day is run.
2) If you want to void a Gift Card transaction from previous day, you can do so through Cash Register, Actions, Gift Cards, Cancel. Please bear in mind that canceling the gift card transaction does not in itself reverse the other elements of the transaction, like selling books.

To see the history of a card:

1) To see the history of a card's transactions, go to Master Files, Gift Cards
2) Input the number of the card you want to edit and click Enter button 3) All the transactions for that card will be shown

To edit the balance of a card:

4) To edit the balance on an existing activated card, go to Master Files, Gift Cards
5) Input the number of the card you want to edit and click Enter button
6) All the transactions for that card will be shown
7) Press F12 Edit Balance, enter in new balance amount, enter reason for change, press F12 Change to save.

To see summaries of gift card transactions:

1) Go to Reports, Gift Cards
2) Choose the type(s) of transactions you want to report on.

To see totals of all cards:
1. Go to Reports, Gift Card Balances
2. Choose the type of transactions you want to report on, and any sorting options.

Frequently Asked Questions

Q: What kinds of cards can we use?

A: We recommend using only a barcode to identify a gift card. While magnetic stripes are an option, gift cards should **never** be swiped with your encrypted credit card reader. Unlike credit cards which should be encrypted, gift cards should not be. Using the EPS credit card swiper to activate a gift card will result in lost and unrecoverable information. Please ensure all new staff persons are fully trained on this aspect.