How to Set Up Gift Cards

Blog · https://retailedge.com/docs/how-to-set-up-gift-cards

If you've recently ordered or received your custom plastic barcoded gift cards, this blog is for you. Just follow these steps and you'll be on your way to selling and redeeming gift cards in RetailEdge. And if you're looking for inspiration on how to promote gift cards, check out our other gift card blog for ideas!

First create a Gift Card inventory item:

1. Press the **Inventory** button on the Toolbar to open up the Inventory Manager.
2. Press the **Add** button to create a new inventory item
3. Fill in the required inventory information making sure:
    - The Stock Number is something short like "GIFT" or "G1" to allow it to be quickly typed in at the time of sale.
    - The Cost of Gift Cards are $0.00.
    - If you are not going to have specific Gift Card pricing set the Retail Price to $0.00. RetailEdge will ask at the time of sale for a dollar value.
    - The item is put into a separate Department of its own (so that the Gift Card margin does not affect other department's margins)
    - The Vendor is the Store.
    - The Stock Type is Gift.
4. Press the **Save** button to save the item in your inventory.

Hint: If you are going to have many different price point gift cards you might consider using an alias (like "G") for the gift cards, to make selling the gift cards faster.

To Sell a Gift Card:

1. Open the Sales Screen and **add** a customer to the sale.

2. Then type in Gift (or the stock number you are using for your Gift Cards) in the Stock Number field on the sales screen.
3. If the gift card has an inventory price of $0.00, RetailEdge will ask you to put in the price and quantity of gift cards being sold.
4. If the gift card has an inventory price, continue entering the number of gift cards you are selling.
5. Add any other items you want to the sale and the press the Goto Pmt button.
6. On the Payment Tab, type in the amount paid in the box by the appropriate payment media
7. Press the Post Sale button (or press the plus (+) key for exact change).
8. Type in, scan or swipe the Gift Card Number(s) being sold when prompted.
9. Press the Ok button.

Manually Issuing a Gift Card:

Sometimes it can be useful to manually issue gift cards (e.g., giving gift cards away as promotions). To manually issue a gift card:

1. Choose Issue Gift Card (Manually) from the Customer|Gift Card menu item.
2. Type in, scan or swipe the Gift Card Number being sold when prompted.
3. Type in the Gift Card Amount.
4. Type in any Notes for the gift card.
5. Press the Ok button.

To redeem a gift card:

1. Press the Sales button on the Toolbar if you are not already in a Sales Screen.
2. Enter the items that the customer is purchasing on the Sales Screen and press the Goto Pmt button.
3. On the Payment tab press the Use Gift Card button.
4. Scan, swipe or manually enter the Gift Card Number. If you are manually entering the gift card number and press Enter after each one. If you are redeeming multiple gift cards continue to do this until all of the gift cards to be used are listed. RetailEdge will then display all of the gift card(s) available or remaining balance on the gift card(s).

5. When you are done entering gift cards, press the Ok button. The total amount (or remaining balance) of the gift certificate will then be placed in a Gift Card payment media on the Payment Tab.
6. If the amount of the sale is MORE than the gift certificate, place the amount still due in the appropriate payment media and press the Post Sale button to complete the sale.
7. If the amount of the sale is LESS than the gift certificate, press the Post Sale button. RetailEdge will then display the Change Options Screen and allow you to choose whether you would you like to
    - return the money to the customer as change.
    - keep it on the credit.
    - keep it on a gift card.
8. Choose the method you want and press the Ok button. RetailEdge will then complete the sale.

Note: If you choose to keep the remaining balance on a gift card, RetailEdge will place the remaining balance on the newest gift card. If you are uncertain which card still has a balance, you can check the gift card status by pressing Ctrl-G.