

Program Installation – Step 1 of 3

Installing the Gift Card Software

Insert CD in computer.

Go to start menu and select “My Computer”

Double Click on the DVD/CD device where you inserted disc

Double Click on the Folder “Giftcards”

Double Click on the File “Setup.exe

Follow these steps on the screen for installation:

- 1.) Welcome to Gift Card set-up Wizard – click Next
- 2.) Select installation folder (default is recommended). You can choose for this installation to be used by everyone or just me – select ‘everyone’ – then click Next.
- 3.) Confirm Installation Screen – click Next.
- 4.) Installation Complete – click Close

Note – You need to complete the installation steps prior to opening program. If you attempt to open the Gift Card Program before completing the next installation steps for your computer, you will receive a .NET Framework error.

Program Installation – Step 2 of 3

Database setup

After the program installation is complete you will need to select the single computer (server) for your **“Database Location”** for the entire Gift Card System. This is the location where all customer gift card information will reside. You will need to insure this information is backed up frequently.

To complete the installation you will need to indicate to each computer in your network where the database file resides.

To set up the “Database Location”:

From your **“Database Location”** computer create a System DSN in Windows XP/2K.

- 1.) Click Start, click Control Panel, double-click Administrative Tools, and then double-click Data Sources (ODBC).
- 2.) Click the System DSN tab, and then click Add.
- 3.) Choose 'Microsoft Access Driver (*.mdb)', and then click Finish.
- 4.) Type 'giftcards' as the data source name, without quotes.
- 5.) Click Select.
- 6.) Browse to database location (default location is C:\Program Files\ACFT\Gift Cards\GCDB).
- 7.) Choose 'GiftCard.mdb'.
- 8.) Click OK, and then click OK.
- 9.) Close Control Panel Window

This Computer is now ready to operate the Gift Card Program.

Program Installation – Step 3 of 3

Directing each network computer to the database location

After the **“Database Location”** installation is complete on your primary computer/server you will need to direct all other network computers you have chosen to load with the Gift Card Program to your **“Database Location”**. This is the location where all customer gift card information will reside.

To complete the installation you will need to indicate to each computer in your network where the database file resides.

To direct a computer to your “Database Location”:

From your other computers create a System DSN in Windows XP/2K.

- 1.) Click Start, click to Control Panel, double-click Administrative Tools, and then double-click Data Sources (ODBC).
- 2.) Click the System DSN tab, and then click Add.
- 3.) Choose 'Microsoft Access Driver (*.mdb)', and then click Finish.
- 4.) Type 'giftcards' as the data source name, without quotes.
- 5.) Click Network then choose any available drive letter from the dropdown box.
- 6.) In the Folder box type '\\server name\gcdb' without the quotes – (**PLEASE NOTE** the server name is the name of your network computer from Step 2 above where the Gift Card Program database resides). Then click Finish.
- 7.) Choose 'GiftCard.mdb' by clicking on it.
- 8.) Click OK, click OK and then click OK.
- 9.) Close Control Panel Window

This Computer is now ready to operate the Gift Card Program.

Program Users Guide

Setting up the Gift Card Program Parameters

Click “**Start**”, point to “**All Programs**” then click “**Gift Cards**”. You will need to complete the 3 following setup steps from one of the network computers prior to first use. Parameter settings can be made from any computer on the network with the exception of **Default Store Location**. This setting is computer specific.

Step 1.) Setting Up Store Locations

Click **File** from the toolbar and then select **Store Location Editor**. You may input a store description from any computer on the Gift Card Program network. Please complete the worksheet template on last page of this manual.

Step 2.) Setting Up a Default Store Location

Click **File** from the toolbar and then select **Store Location Editor**. Select the default location for this computer by clicking on it from the available list of locations that were established in Step 1 above. Then check the box for **Default** and click **Update**. This selection will be the default location for every transaction input on this computer. There is also an option to make other locations not visible in the dropdown box for this computer by de-selecting the **Visible** check box and then clicking **Update**. Exit by clicking the red **X** in upper right corner of the dialogue box.

Step 3.) Setting up Transaction Types

Click **File** from the toolbar and then select **Transaction Type Editor**. Key in a transaction **Name**. Next select whether it is an **Addition or Subtraction** from the card balance. Next select whether or not you want that transaction type visible at this time. In most cases all transaction types would be visible at all times. If there was a need to restriction a transaction type by computer you would de-select the visible button. Once you have made your selection here click **Add**. Please complete the worksheet template on last page of this manual.

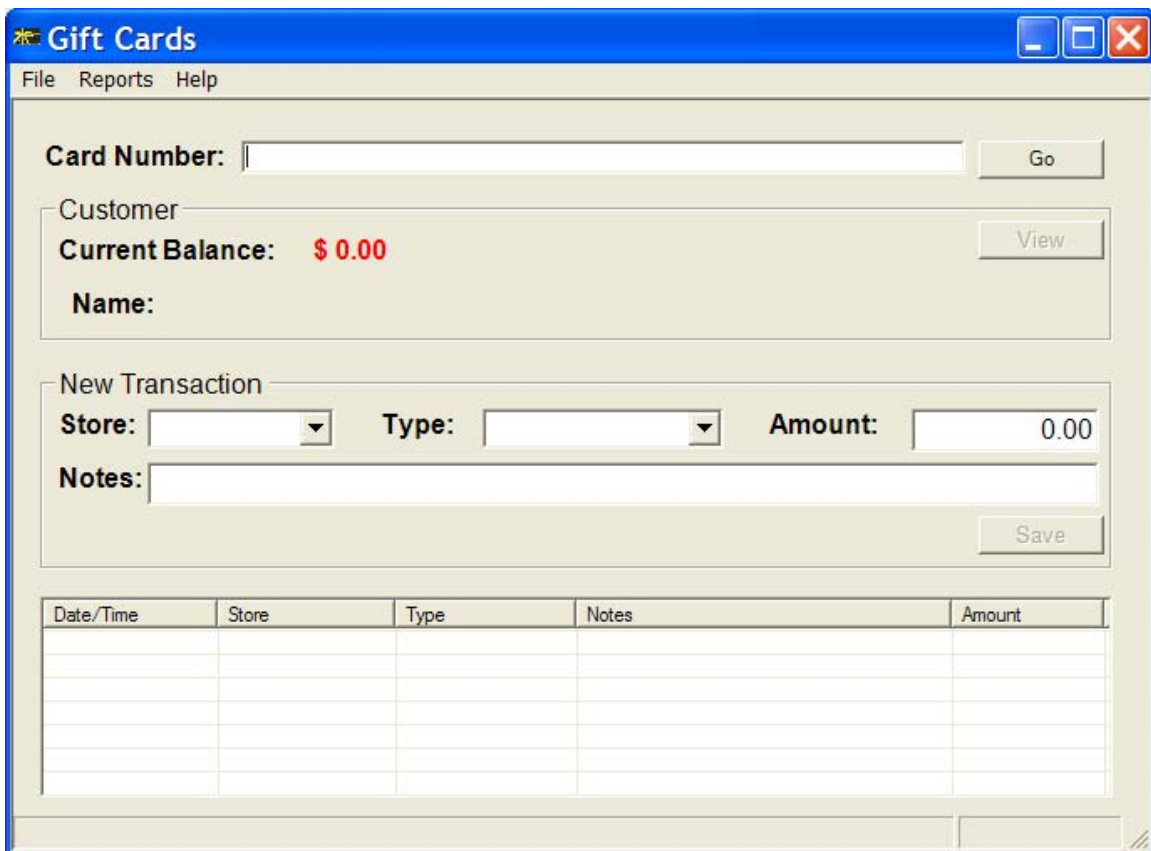
Note – Although all location & transaction types are available on all network computers the Visible function is a setting to the local computer only.

Congratulations, you are now ready to process gift card transactions.

Inputting Gift Card Transactions

Entering Card Data

When the Gift Card Program is opened the cursor will be positioned in the **Card Number** field waiting for the gift card to be entered. Swipe the card to populate the field. The number will be accepted and you are ready to transact. (Note - Only if you key the card number in manually will you need to select the **Go** button to accept the card number.)



The screenshot shows a software window titled "Gift Cards" with a menu bar (File, Reports, Help). The interface includes a "Card Number" input field with a "Go" button. Below this is a "Customer" section with a "Current Balance" of \$ 0.00 and a "Name" field, accompanied by a "View" button. The "New Transaction" section contains "Store" and "Type" dropdown menus, an "Amount" input field set to 0.00, and a "Notes" text area, with a "Save" button. At the bottom is a table with columns for Date/Time, Store, Type, Notes, and Amount.

Date/Time	Store	Type	Notes	Amount

Entering Customer Information

When using a new card the **Customer Information** form will open. You have the option to collect additional information from the card purchaser. You are not required to enter customer information. If you choose to enter additional card holder information, do so and then select **Save**. If you choose not to capture additional information select **Cancel**. You can input or change customer information at any future date by selecting **View**.

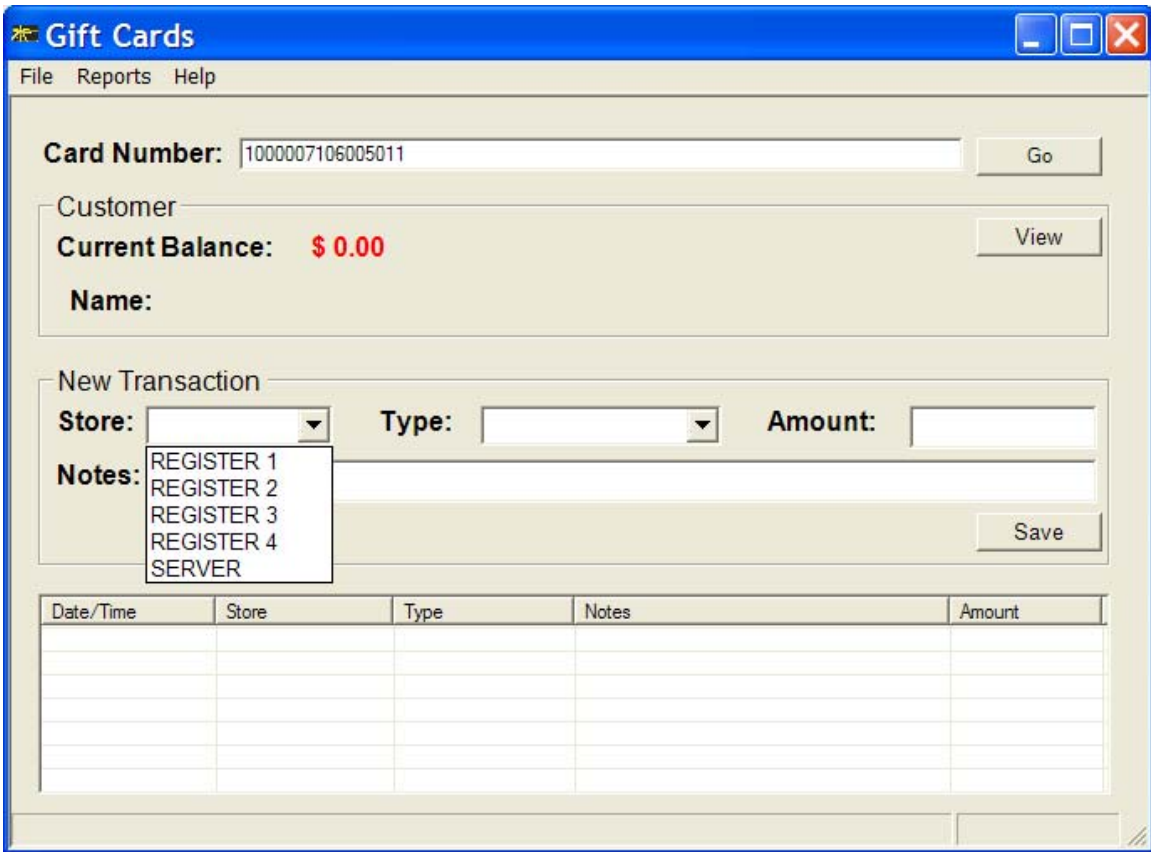
The screenshot shows a 'Customer Information' form with the following data:

Card Number:	100007106005011
Name:	Carol Customer
Address:	324 Oak Avenue
City:	Anytown
State:	MD
Zipcode:	21212
Email:	Carol@customer.com
Phone:	800-555-1212
Create On:	9/29/2005 8:27:49 PM
Modify On:	9/29/2005 8:27:49 PM

Buttons: Save, Cancel

Entering a transaction

Select your location from the **Store** dropdown box. (Note – see setting up a default store location above).



The screenshot shows a software window titled "Gift Cards" with a menu bar (File, Reports, Help). The main area contains several sections:

- Card Number:** A text box containing "1000007106005011" and a "Go" button.
- Customer:** A section containing "Current Balance: \$ 0.00" and a "View" button.
- Name:** A text box for entering the customer's name.
- New Transaction:** A section with three dropdown menus: "Store:", "Type:", and "Amount:". Below these is a "Notes:" text box and a "Save" button.

The "Store:" dropdown menu is open, showing a list of options: REGISTER 1, REGISTER 2, REGISTER 3, REGISTER 4, and SERVER.

At the bottom of the window is a table with the following columns: Date/Time, Store, Type, Notes, and Amount. The table is currently empty.

Next select a transaction type from the **Type** dropdown box. (Note – see setting up transaction types above).

★ **Gift Cards**

File Reports Help

Card Number:

Customer

Current Balance: \$ 0.00

Name:

New Transaction

Store: **Type:** **Amount:**

Notes:

Date/Time	Store	Type	Notes	Amount

Next enter in the **Amount** of the transaction. You have the option to attach a **Note** to this transaction, however it is not a required entry. Select **Save** to complete the transaction.

Gift Cards

File Reports Help

Card Number:

Customer

Current Balance: \$ 0.00

Name:

New Transaction

Store: **Type:** **Amount:**

Notes:

Date/Time	Store	Type	Notes	Amount

After either inputting a card number or saving a transaction the Gift Card screen will reflect the card balance along with the last seven transactions on this card. All card previous card activity can be viewed in the report section.

Gift Cards

File Reports Help

Card Number:

Customer

Current Balance: \$ 54.00

Name: JOHN CUSTOMER

New Transaction

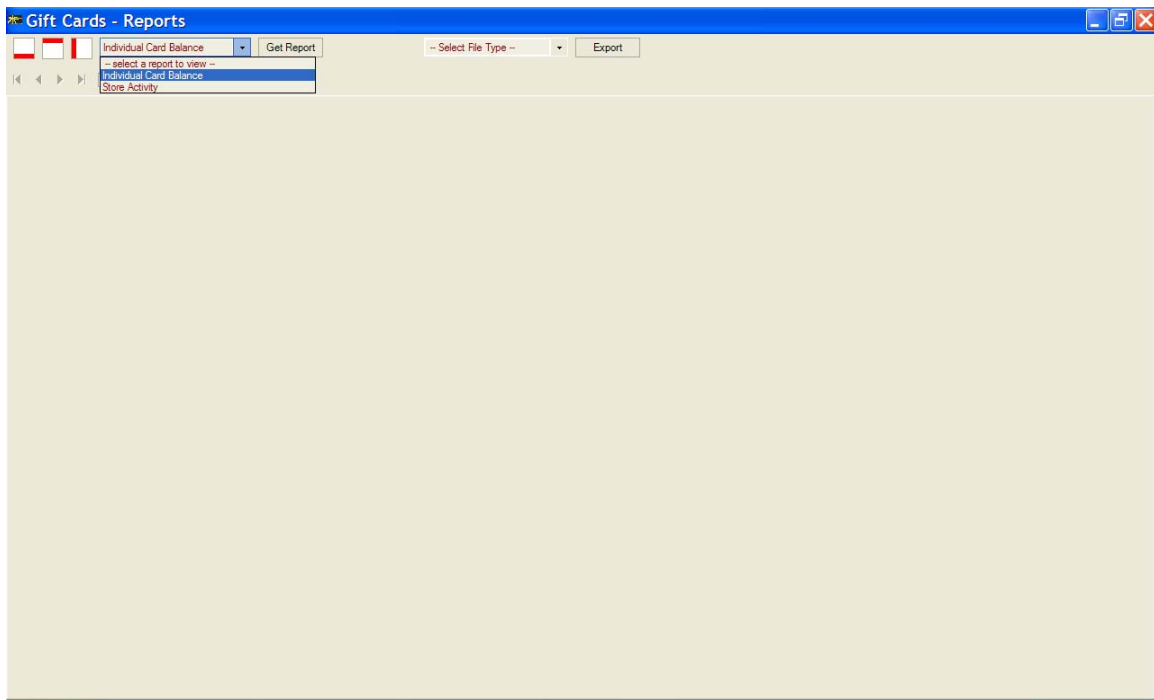
Store: **Type:** **Amount:**
Notes:

Date/Time	Store	Type	Notes	Amount
09/26/05 01:52	REGISTER 2	PURCHASE	SHIRT	-14.00
09/21/05 03:07	REGISTER 1	PURCHASE		-57.00
09/21/05 03:06	REGISTER 2	ADD VALUE	RETURNED CHAIR	25.00
09/21/05 06:31	REGISTER 2	ADD VALUE		200.00
09/21/05 06:30	REGISTER 2	PURCHASE	B.D. GIFT FOR MOM	-100.00

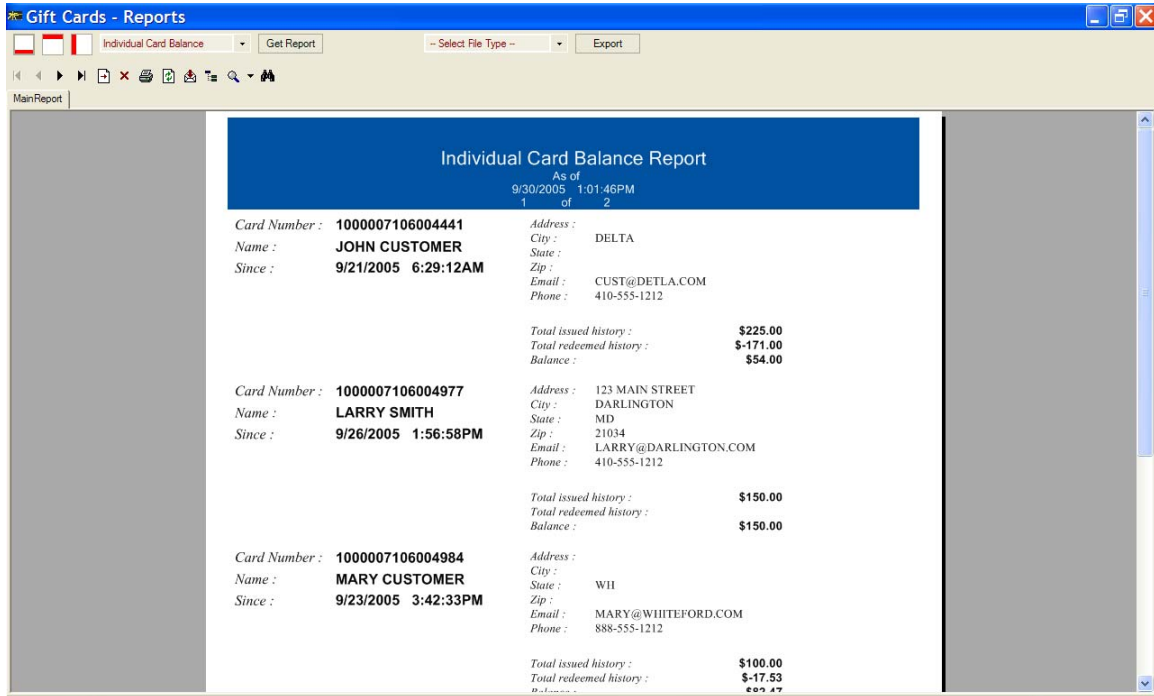
Report Selection & Printing Guide

Individual Card Balance Report

- 1.) From the toolbar click **Reports**.
- 2.) From the 'select a report to view' dropdown box select **Individual Card Balance**.



3.) Then click the **Get Report** button.

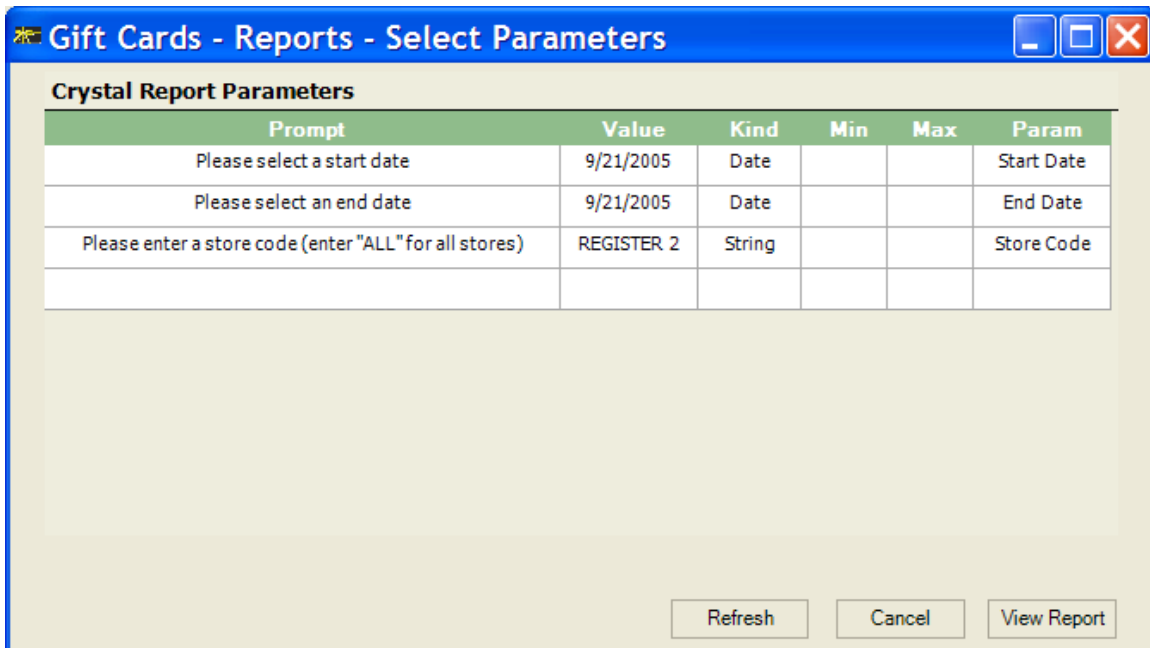


4.) Exit by clicking the red **X** in upper right corner of the dialogue box.

The individual card balances will be displayed with the Grand Totals at the bottom of the last page. This reflects the current outstanding balances for all cards in your Gift Card Program Network.

Store Activity Reports

- 1.) From the toolbar click **Reports**.
- 2.) From the 'select a report to view' dropdown box select **Store Activity**.
- 3.) Then click the **Get Report** button.
- 4.) The default settings will display all activity for the default computer selected in **Setting Up a Default Store Location** above. Today's dates will also be the default start and end dates. This will reflect your total activity for this computer for today to balance out your POS receipts. You may select any start or end dates by clicking on the date field. You may also select any individual computer or display the total network activity by entering 'ALL' in the **Store Code** field.



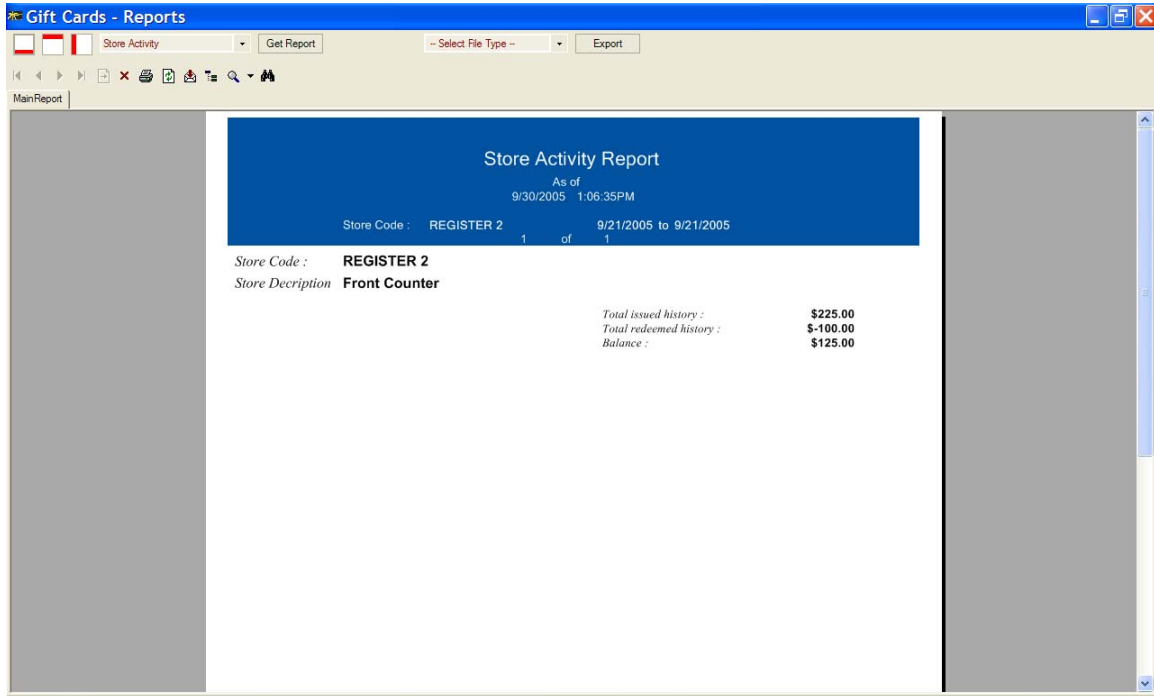
Gift Cards - Reports - Select Parameters

Crystal Report Parameters

Prompt	Value	Kind	Min	Max	Param
Please select a start date	9/21/2005	Date			Start Date
Please select an end date	9/21/2005	Date			End Date
Please enter a store code (enter "ALL" for all stores)	REGISTER 2	String			Store Code

Refresh Cancel View Report

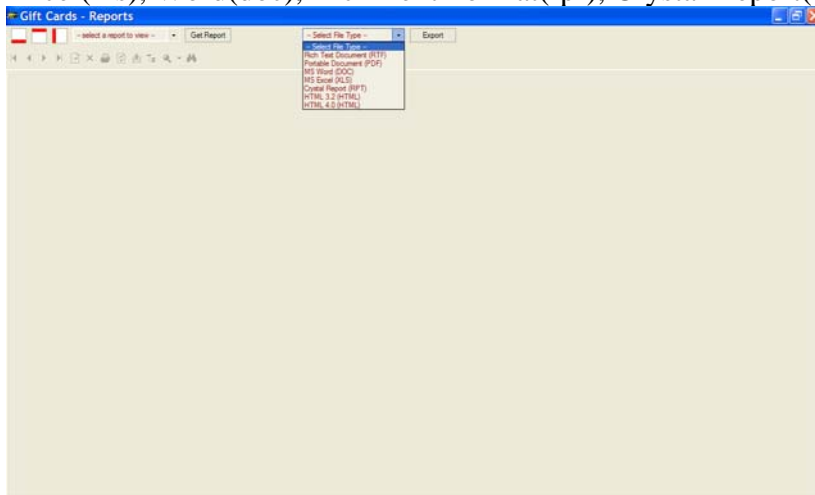
Report View



5.) Exit by clicking the red **X** in upper right corner of the dialogue box.

Printing or Exporting

All reports are in print format and can be sent to any printer by selecting the 'printer' icon at the top of the report screen. Reports also may be exported as Acrobat (PDF), Excel(xls), Word(doc), Rich Text Format(rpf), Crystal Report(rtp) or HTML(3.2 or 4.0).



Worksheet

Sample Store Codes

Your Store Code Choices

Store Code	Store Description	Store Code	Store Description
Store 1	Front Counter		
Store 2	Station 1		
Register 1	Main Sale Counter		
Register 2	Mary Brown		
Store A1	Retail Only		
Store A2	Holiday Station		
Darlington	Office		
Whiteford	Warehouse		
Baltimore	Charles Street		

(Store Code field name limited to 10 characters)

Sample Transaction Types

Your Transaction Type Choices

Transaction Type	Add/Subtract	Transaction Type	Add/Subtract
Issue Card	Add to Balance		
Add Value	Add to Balance		
Redeem Card	Subtract from Bal.		
Return	Add to Balance		
Store Credit	Add to Balance		
Purchase	Subtract from Bal.		