

Tab Wizard Integrated Gift Card User Manual

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Section 1 - Introduction

A great way to acquire new customers while retaining the loyal ones is to set up a gift card program. The many benefits of the gift card are often overlooked by merchants. Gift cards can be displayed at the cash register or front desk for easy access. Below, find more benefits of Tab Wizard Gift Cards

1. Attract New Customers

Gift Cards are usually effective at a business accepting credit cards for products or services that most people want or need - at a bar or restaurant, for example, which carries food menu or drinks that many customers wouldn't normally buy. Gift cards encourage people who might not otherwise visit your business to take a look around and likely return to make additional purchases.

2. Increase Brand Awareness

When your gift cards is designed to match your company logo and brand, it essentially works as a marketing tool in the customer's pocket. As people purchase more gift cards to give to their friends on birthdays and holidays, your brand continues to be dispersed among new customers.

3. Improve Sales

Although gift cards are often set to a specific amount, many customers will end up spending more. The gift card encourages customers to enter the store and try different menu items, beverages and products.

4. Reduce Fraud

The use of an electronic Gift Card allows for partial redemption, leave the rest of the balance stored on the gift card and eliminating cash backs. You can also use gift cards for store credit, eliminating fraud that occurs when customers try to make expired returns for cash. Issuing Gift Cards in place of cash encourages more sales.

Some of the Tab Wizard Gift Card Features include:

- Gift Card is another form of currency payment
- Ability to activate new gift cards
- Load and check balances on gift cards
- Refund or Void balances to gift cards
- Detailed reports to track the history of any gift card
- Monthly / Date Range reporting by cards sold with remaining balances
- Store Propriety only used in your store location
- Scan / Swipe / QR / Manual entry
- Password protected activations
- Password protected reports

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Section 2 - Gift Card Button Location

Note: The Gift Card redemption method uses the current Gift Card button located from the [**Cash Tender**] button and disables the original Gift Card feature. The original Gift Card button allowed reporting of papered daily gift card sales but was never used as a means of accountability and functionality.

1. There is now a new button under [**Main**] > [**Gift Card**]. This button is where most of the Gift Card activity will occur to activate new cards, check balances, reload funds and check gift card history.
2. A new button located under [**Reports**] > [**Gift Card**] (to be modified later) for selecting reports of Gift Cards sold on a Date Range with the ability to sort and print by: Card Number, Date Activated, Date of Last Use, Balance Low to High, Balance High to Low and also displays the total balance open for all cards.
3. [**Cash Tender**] > [**Gift Card**]. This button allows to redeem the Gift Card as a form of payment.

Section 3 - Activating New Gift Cards

1. Gift cards must be activated first by selecting [**Main**] > [**Gift Card**]
2. You will be prompted to **swipe, scan** or **manually** enter a card number. (if manually entering a number, the system will track that it was entered manually however, it is up to the business how they track placement of the customer card with no actual card)
3. If the card has not been previously used in the system, you will be prompted to activate by adding an amount to the card. Select [**Add Value**] (example: \$20.00) > [**Accept**] where you will be taken back to the sales grid.
4. Add any other items to sell to the grid and select a form of payment or select [**Accept**]
5. **All gift card transactions will print a balance receipt** to give to the customer with their card in hand. This feature cannot be turned off however, if a receipt didn't print, go back to [**Main**] > [**Gift Card**] > **Swipe the card** > [**Print Balance**]

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Section 3 - Using a Gift Card as a form of payment

1. After the sales grid is complete with products to sell, select [**Cash Tender**] > [**Gift Card**] > **Swipe or Scan a Gift Card**.
2. If a balance is on the card, you will then be back to the Sales Grid to finalize payment. Select [**Accept**] and wait for the receipt balance to print.
3. Hand the Gift Card and Receipt back to the customer.

Section 4 - Partial Payment - Cash, Check, Charge or Gift Card

1. After the sales grid is complete with products to sell, select [**Cash Tender**] > [**Gift Card**] > **Swipe or Scan a Gift Card**.
2. Type in the **amount** you would like to pay via [**Cash**], [**Check**] or [**Charge**]
1. Notice the new **Balance Due amount**. Select [**Cash Tender**] > [**Gift Card**] where you will then taken to the Gift Card swipe screen.
2. **Swipe the Gift Card** > [**Accept**] and wait for the receipt balance to print.
3. Hand the **Credit Card, Gift Card** and **Balance Receipt** back to the customer.

Section 5 - Partial Payment - Credit Card (Integration) & Gift Card

1. After the sales grid is complete with products to sell, select [**Cash Tender**] > [**Gift Card**] > **Swipe or Scan a Gift Card**.
2. Select [**Credit Card**] > [**Amount**] and change the credit card amount to the amount you would like to pay using the credit card.
3. Follow the credit card swipe prompts > [**Accept**]
4. Notice the new Balance Due amount. Select [**Cash Tender**] > [**Gift Card**] where you will then taken to the Gift Card swipe screen.
5. **Swipe the Gift Card** > [**Accept**] and wait for the receipt balance to print.
6. Hand the **Credit Card, Gift Card** and **Balance Receipt** back to the customer.

Section 6 - Balance Inquiry - Individual Card

Select [**Main**] > [**Gift Card**] > **Swipe the card** > **View** or [**Print Balance**]

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Section 7 - Refunds / Voids to a Gift Card as a form of Credit

Note: A Gift Card cannot be discounted. The Check Adjust button has been disabled on Gift Card sales.

1. Select an item from the Menu item to be refunded or voided > [**Refund**] or [**Void**]
2. Select [**Cash Tender**] > [**Gift Card**]
3. **Swipe the Gift Card** > [**Accept**] and wait for the receipt balance to print.
4. Hand the **Gift Card** and **Balance Receipt** back to the customer.

Section 8 - Reporting

- **Individual Balance & History Report**

Select [**Main**] > [**Gift Card**] > **Swipe the card** > [**History**] > **View**, [**Print**] or [**Close Report**]

- **Individual Balance & History without having the physical card present**

1. Select [**Report**] > [**Gift Card**] > [**Sort**] (desired sort). Keep note or print the report of the Gift Card in question > [**Exit**]
2. Select [**Main**] > [**Gift Card**] > [**Manual Entry**] > Type the card number > [**OK**]
3. Select [**History**] > **View**, [**Print**] or [**Close Report**]

- **Balance Reports - All Gift Cards**

1. Select [**Report**] > [**Gift Card**]
2. Sort by: **Card Number**, **Date Activated**, **Date of Last Use**, **Balance High to Low** or **Balance Low to High**
3. View or [**Print**] > [**Exit**]

More to come...