

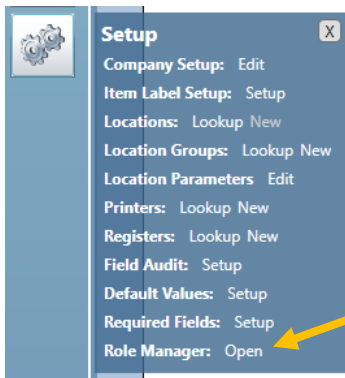
Gift Card Data Management Module

The Gift Card Data Management module has been created so that you can import and edit your own Gift Cards within OpSuite. Within this module, you can upload new Gift Card Numbers against an Item Type “Voucher” SKU, edit Gift Card Numbers, set an expiry date and change the originating SKU.

Please note: Gift Cards cannot be imported with a balance/the balance cannot be added within Gift Card Data Management Edit, as the balance must be added to an OpSuite transaction.

Role Actions

In order to start using the Gift Card Import and Edit Module, please ensure the below Role Actions are in place:
Navigate to Settings > Role Manager > Open



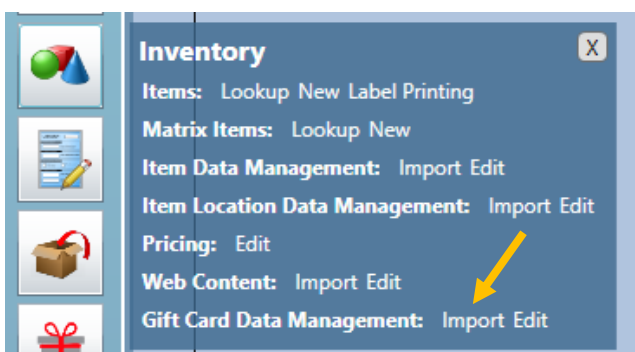
For Importing Gift Cards– ImportGiftCards

For Editing the Gift Cards once in OpSuite - EditGiftCards

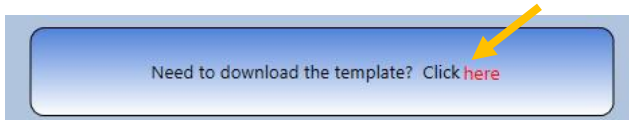
☒	ImportGiftCards	Import Gift Cards
☒	EditGiftCards	Edit Gift Cards

Gift Card Data Management - Import

- 1) Once the Role Action is enabled, navigate to Inventory > Gift Card Data Management > Import



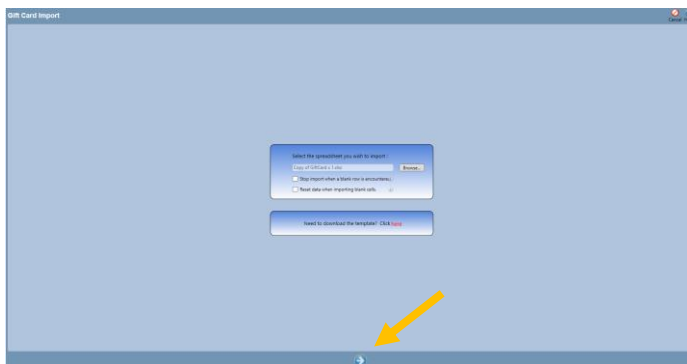
- 2) To obtain the Import template, click to download the template from the Import Wizard



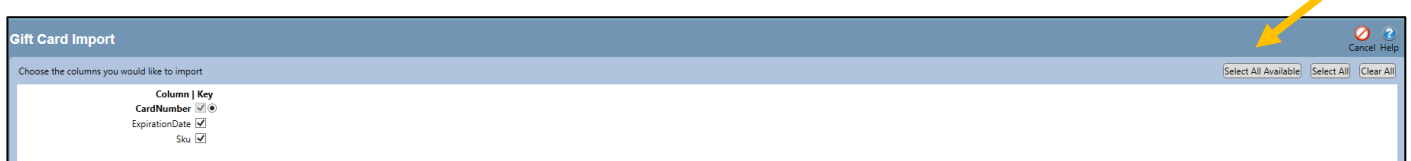
- 3) In the excel document for the Import, you will need to include the Gift Card Number, Sku and Expiration Date (if required) of each gift card

	A	B	C
1	CardNumber	Sku	ExpirationDate
2	9998744111045	01209	19.05.2024
3	9998744111046	01209	19.05.2024
4	9998744111047	01209	19.05.2024
5	9998744111048	01209	19.05.2024
6	9998744111049	01209	19.05.2024
7	9998744111050	01209	19.05.2024
8	9998744111051	01209	19.05.2024
9	9998744111052	01209	19.05.2024
10	9998744111053	01209	19.05.2024

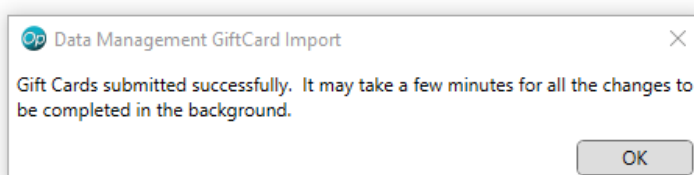
- 4) Once complete, save the excel document and close excel. Then navigate back to OpSuite > Gift Card Data Management > Import. Browse for the complete Gift card import sheet and then click on the arrow to move to the next step



- 5) OpSuite will map to the CardNumber column only, this is to ensure there are no duplicates within OpSuite. In the right hand corner chose 'Select All Available' – this way OpSuite will also pick up the other completed columns > then click on the next arrow



- 6) OpSuite will then import the spreadsheet
- 7) Double check the Gift Card Import and check for any validation errors, if there is a red invalid warning – hover over the red cell to check the error details. Once ok, click 'Import' in the top right hand corner. OpSuite will then present a message to state the import has been successful

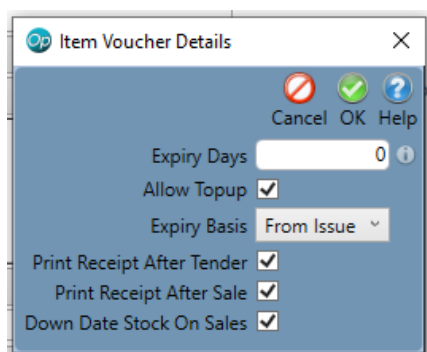


- 8) To double check the import, or to lookup gift cards in OpSuite – navigate to Reports > Active Reports > Own Gift Card Balances

Sales		
	Name	Description
		
	Own Gift Card Balances	Own gift card/voucher or credit note balances. Filter by location and gift card or credit note number.

Please note: The expiry dates imported using the spreadsheet for Gift Card Data Management will only be valid if the Gift Card Item Master expiry date is set to 0. If the Gift Card Item Master has an expiry date present, this will be valid for all the Gift Cards associated to this SKU.

To check within the Item Card, navigate to Voucher Details:



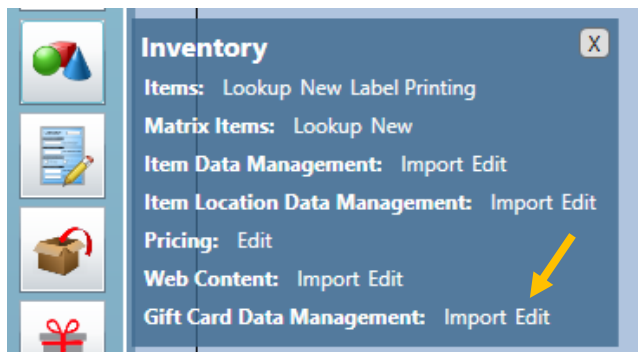
The 'Item Voucher Details' dialog box contains the following fields and options:

- Expiry Days: 0
- Allow Topup: ☒
- Expiry Basis: From Issue
- Print Receipt After Tender: ☒
- Print Receipt After Sale: ☒
- Down Date Stock On Sales: ☒

Buttons: Cancel, OK, Help

Gift Card Data Management - Edit

- 1) Once the Role Action is enabled, navigate to Inventory > Gift Card Data Management > Edit



- 2) In the Lookup Criteria Filters – you can choose to filter on the Gift Cards Expiration Date, Voucher Items and Gift Card Number. Once the details have been added to the required Filter, click Apply at the bottom of the screen

- 3) OpSuite will then bring back the items based on the search criteria

	Card Number	Sku	Expiration Date	Balar	Date Created	Date Sold	Last Used
1	AS000112343	GC		£51.00	29/11/2021	29/11/2021	29/11/2021
2	AS000112344	GC		£36.00	29/11/2021	29/11/2021	29/11/2021
3	6691	GC	01/08/2024	£20.00	20/05/2022	20/05/2022	20/05/2022
4	6412	GC	20/05/2023	£0.00	20/05/2022		
5	6413	GC	20/05/2023	£0.00	20/05/2022		

- 4) Each column can be filter on to find specific Gift Card details

	Card Number	Sku	Expiration Date	Balar	Date Created	Date Sold	Last Used
1	6691	GC	01/08/2024	£20.00	20/05/2022	20/05/2022	20/05/2022

- 5) The columns can also be sorted by clicking on the column header - so values run from high to low or vice versa

	Card Number	Sku	Expiration Date	Balar	Date Created	Date Sold	Last Used
1	AS000112343	GC		£51.00	29/11/2021	29/11/2021	29/11/2021
2	AS000112344	GC		£36.00	29/11/2021	29/11/2021	29/11/2021
3	6691	GC	01/08/2024	£20.00	20/05/2022	20/05/2022	20/05/2022
4	6412	GC	20/05/2023	£0.00	20/05/2022		

- 6) Expiry Dates can be amended by you; however SKU changes can only be made if the Gift Card has a zero balance or has not been sold.

- 7) These results can also be exported to excel by using the 'Export' functionality in the top right hand corner of the screen

