

Value-Added Products



Gift Cards

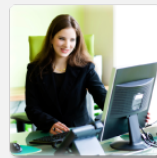
- Creating a New Gift Card Product -

Last updated: July 2010



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Before creating a New Gift Card Product, you may want to consider creating a new category for Gift Cards. To create a new category, please see the [Creating a New Product Category Help File](#) for more information. **Our Recommendation:** Create two product sub-categories under the Gift Card category:

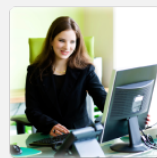
- **Ranged Gift Cards** - Range pricing will allow the user to set the min/max price and when sold at the POS, the product will default to load the min price, but be editable up to the max price.
- **Set Gift Cards** - Fixed pricing will allow the user to set the 'unit price' and when the product is sold at the POS, the product will default to load the unit price amount.

Gift Cards are created as Non-Serialized items. A Serial Number is only attached to a Gift Card at the Point of Sale.

To create a New Gift Card Product, please do the following:

Inventory Console | New Product | New Gift Card Product to open the **New Gift Card Product** screen.

When the **New Gift Card Product Screen** pops up, you will notice you are presently situated in the **Details Tab** for this product. This is where you start entering general information about this new product.

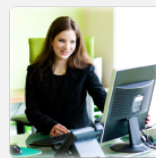


Details Tab

You have the option to disable this product if so desired to ensure that it is not used until the appropriate time. To do so, check off the **Product Disabled** drop down box. Disabled products will not appear in the inventory tree and therefore cannot be chosen at the POS or in a transfer etc.

Product Category

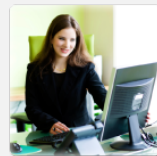
- Click on the **Category Tree** button underneath the Product SKU field to select which category this new product belongs in.
- Once you have selected your category, type in your **Description** of the product.
- Use the Warehouse Location to note where this product is stocked in your central warehouse. Leave this field blank if you do not use a warehouse to house your product.



- Tab to the next field, which is the **Short Description** Field and you will notice that the program has automatically taken the first 30 characters from your long description and placed them in the short description field for you. If this does not satisfy you, you can make any adjustments you feel necessary to the Short Description field. This field is primarily used in association with bar codes; therefore this is the description you will see on any bar codes you may print for this item.

Pricing Method

- Tab to the **Pricing Method** field and select whether or not you would like a **Fixed** pricing structure for this item or a **Range** pricing structure. Fixed pricing will allow the user to set the 'unit price' and when the product is sold at the POS, the product will default to load the unit price amount. You will notice the Min Price and Max Price fields are inactive when choosing the Fixed Pricing Method. Range pricing will allow the user to set the min/max price and when sold at the POS, the product will default to load the min price, but be editable up to the max price. You will notice the Unit Price field is inactive when choosing the Range Pricing Method.
- If you have chosen the Range Pricing Method above, the **Min Price** and **Max Price** fields will be available in the **Pricing** Tab for editing. Enter your Min and Max Prices in these fields. The Min price will be the lowest amount the user will be able to associate to the card and must be less than or equal to the Max price. The Max price will be the highest amount the user will be able to associate to the card and must be higher than \$0.00. A \$0.00 Max value would mean that no value can be put on the card as the min and max would be \$0.00.
- Tab over to the **Min Qty** and **Max Qty** fields. Enter a minimum and maximum inventory level for this item, if you so choose. These fields are needed when using the Auto Ordering and Auto Transfer features of the software. If you enter values in either of these fields, when you tab out of the respective field, you will be asked "Do you want this value applied to all locations?" Click Yes to continue or No to cancel your request.
- Tab over to the **Price** field. If you have chosen Fixed Pricing as your pricing method, the Unit Price is the Suggested RQ4 Price, or your selling price. Enter the Unit Price. Once you tab off, you will be asked if you would like to apply this price to all locations. Click Yes to apply this price to all available locations. Click No to set the price for the current location only.



Manufacturer

- Tab down to the **Manufacturer** field and choose the manufacturer of this product from the drop-down menu.
- Tab down to the **Manufacturer SKU** field and enter the manufacturer's SKU for this item. If you do not know it, or choose not to use this field - you may bypass it.
- The next field is the **Average Cost** of this item - please enter a positive currency value in this field.
- Next, you can add any **Bar Codes** that may be associated to this product. Click in the Bar Codes field and scan in the UPC on the item itself, and the bar code will show up here. Click the Add button and repeat to associate multiple barcodes to this product. These bar codes can then be used to search for this product in various places throughout the software.

Ecommerce

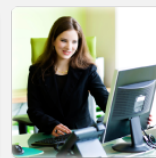
- Tab to the **Ecommerce Item** check box. If you are using the Ecommerce software addition to RQ4, you can check off this box to include this item on your ecommerce site, which means you can sell a gift card on your site, it **does not** mean you can redeem a gift card on your site.

Invoice Comments

- Click on the **Invoice Comments** button if you would like to write something about this product to show up on each and every invoice that is billed with this item on it, such as warranty information. The maximum number of characters for this field is 1000 characters.

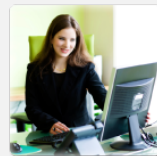
Maintenance Fee

- **Maintenance Fee details** are designed to move monies from the liability account to the profit side of the books; the user will set the rules for each Gift Card Product. Maintenance Fees cannot be used in many provinces in Canada as it is illegal to do so. Checking the **Apply Maintenance Fee** will activate the remainder of the maintenance fields.
- **Apply Fee After 'X' Months** means that after the number of months indicated have transpired after the sale of the product, the card will either depreciate per month (if that is the rule the user has set up) or the full amount remaining on the card expires. If the



Apply Maintenance Fee checkbox is checked, this field is required for a save of the product. It is based on a calendar month (For example, June 2nd to July 2nd). Must be 1 or greater. No decimal is required.

- The **Fee Schedule** lets the user determine how the fee is applied. Choose either **Monthly** or **Expire** from the drop down menu.
- Choosing the **Monthly** option means that each month the amount set by the user will be moved from the liability account into a sales account, until the balance is zero. It will default to Monthly. The zero balance can be achieved through the fee being taken off the balance and the customer using the card after the time threshold has been met. If you choose the Monthly option, please enter the **Amount** in the field below. This is required to save the product.
- The **Expire** option means that once that time threshold has been met, the entire amount remaining on the card will be moved from the liability account into a sales account.
- The Amount of funds to be processed will be defined in the product configuration; monthly or expire (full amount).
- Funds are to be transferred from and to, the G/L accounts defined in the product configuration (out of liability and into revenue).
- The System will process cards that require a maintenance on a specific day once a month.

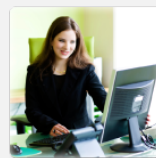


Accounting Setup

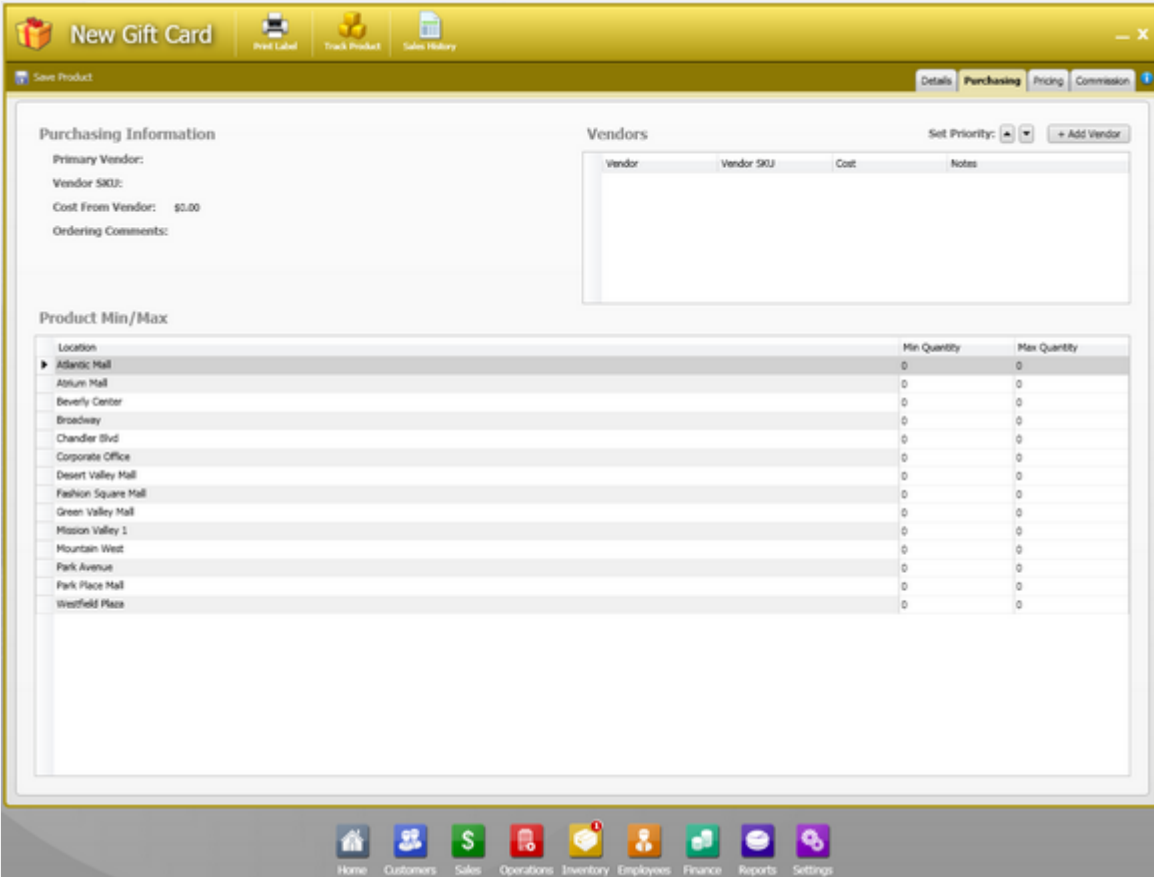
The screenshot shows the 'New Gift Card' software interface. The top navigation bar includes 'Print Label', 'Track Product', and 'Sales History'. The main content area is divided into two columns: 'Product Details' and 'Product Attributes'. The 'Product Details' section includes fields for Product SKU, Category, Description, Short Description, Pricing Method (Fixed Pricing), Price (\$0.00), Ordering / Costing (Average Cost: \$0.00, Most Recent Cost: \$0.00), Manufacturer, and Manufacturer SKU. The 'Product Attributes' section includes 'Ecommerce Item' (checked), Warehouse Location, Invoice Comments, and Maintenance. The 'Accounting' section at the bottom-left is expanded, showing five fields for General Ledger (G/L) accounts: G/L Cost of Sales Acct, G/L Sales Acct, G/L Inventory Acct, G/L Inventory Corr Acct, and G/L Liability Acct. Each field has a small tree icon to its left.

Click on the Accounting option at the bottom-left part of the screen of the New Gift Card Product **Details tab** screen to set which General Ledger accounts your **Cost of Goods Sold, Sales Liability, Sales Revenue, Inventory on Hand, and Inventory Corrections** gets written too. Please note - If defaults have been set in the Company Setup, Finance Tab, G/L Defaults section, these defaults should appear here, however they can still be changed if needed.

- Use the Category button to open your tree of General Ledger Accounts for each field.
- Open the tree using the +/- icons.
- Double-click on the G/L account to associate this product to.

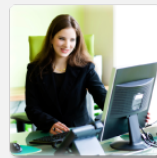


Purchasing Tab



Click on the Purchasing Tab at the top of the New Gift Card Product screen.

- Click the **Add Vendor** icon and find the **Vendor** you will be purchasing this item from. Double click your selection. Note: you can add more than one vendor for each product.
- Tab over to the **Vendor SKU** column in the **Vendors** grid and enter the vendor part number for this item.
- Tab over to the **Cost** field and enter your cost here.
- Click on the **Notes** button at the end of the row to add any additional notes when ordering this product or about the vendor being used.
- The first vendor in the list is considered the primary vendor.



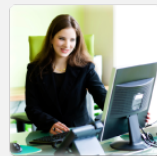
- You can use the **Up and Down Arrows** in the top right to set the priority of your vendors if you have more than one.

Pricing Tab

Click on the Pricing Tab at the top of the New Gift Card Product screen. This is where you can see which of your locations are eligible to sell this item.

Location Pricing

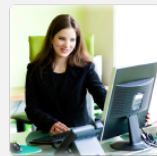
- If this item is only sold in a specific region or location, you can delete any stores who will not be selling it. This can be done by clicking on the row in the **Pricing Details By Location** grid and pressing delete on your keyboard. You can also use the SHIFT/CTRL buttons on your keyboard to select multiple rows and then press the Delete key on your keyboard. A warning message will appear asking "Are you sure you want to remove the selected row(s)?" Click Yes to continue or No to cancel your request.



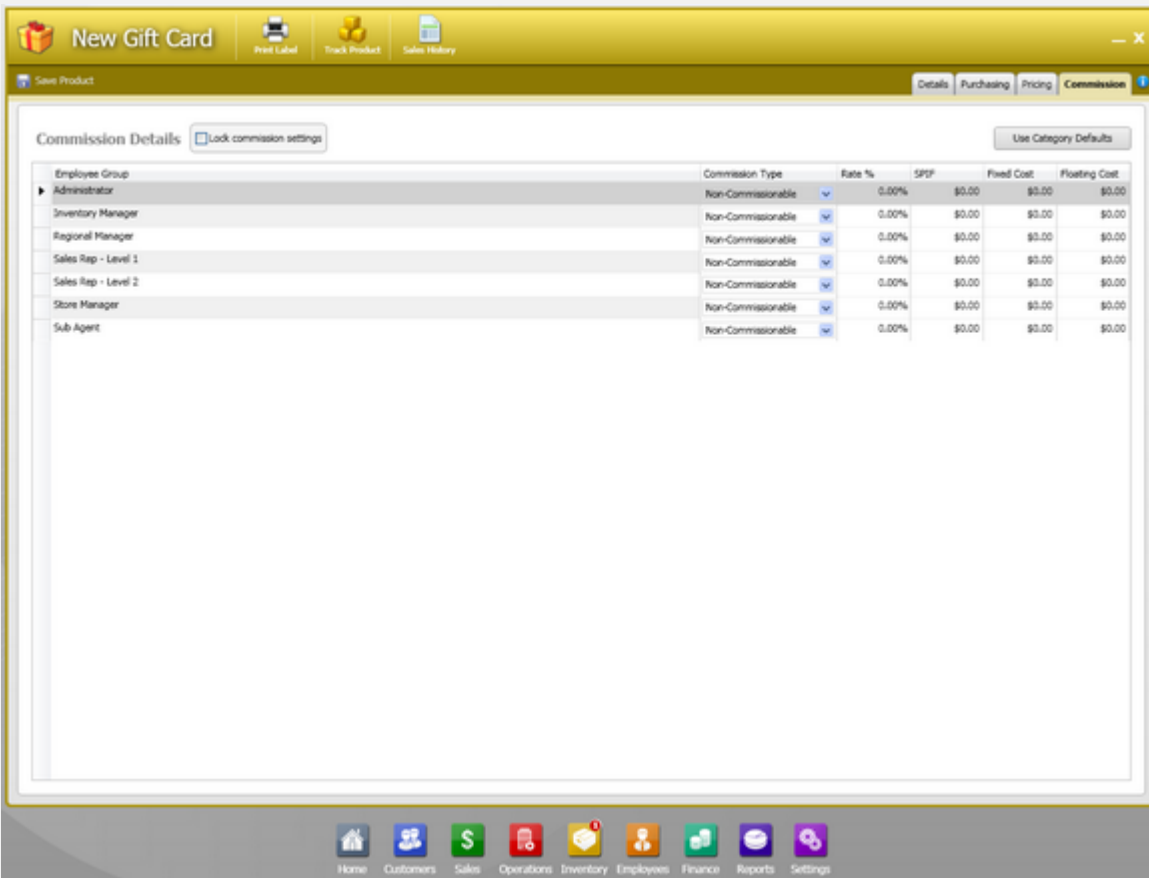
- You will notice the price is that of the unit price you previously entered. If you want to change the **Unit Price** at one or more locations, tab into the appropriate row, enter the new amount and tab out. You will receive a message saying "Do you want this value applied to all locations?" You can choose Yes or No.

Min/Max Pricing

- The **Min Price** and **Max Price** represent the min/max prices from the General Tab if you chose the **Range Pricing** option. The **Min Price** and **Max Price** fields will be available for editing in the Pricing Tab as well. Enter your Min and Max Prices in these fields. The Min price will be the lowest amount the user will be able to associate to the card and must be less than or equal to the Max price. The Max price will be the highest amount the user will be able to associate to the card and must be higher than \$0.00. A \$0.00 Max value would mean that no value can be put on the card as the min and max would be \$0.00.
- The **Min** and **Max** Quantities represent the min/max inventory levels you added under the General Tab and will trigger product for re-order when using the Auto Order Report. It will also come into play in the Auto Transfer In/Out Reports. You can change the Min and Max Quantities in the pricing tab as well. By doing so, once you tab out of a specific field, you will be prompted "Do you want this value applied to all locations?" Click Yes to continue or No to cancel your request.



Commissioning Tab



Click the Commissioning Tab at the top of the New Gift Card Product screen to set the **default commissions for each group** that you have set up in your company. This tab allows you to commission each group differently.

- Check off the **Lock Commissions Settings** so that Mass updates do not reset them if you do not want anybody to accidentally change the commission on this new product unknowingly.
- Click the **Get Commission Defaults** button to set the commissioning that was set for the category you have selected to hold this product.
- Use the grid to make manual adjusts on commissioning for this product. Select the **Commission Type** from the drop down at the end of each cell and enter the corresponding field(s) in the grid to set the commission.



- You can rearrange the columns by clicking on the column headers and dragging them to where you'd like them.
- You can sort the grid by clicking on the column header.
- Double check the information you have added under all tabs. If it is satisfactory, click the **Save And Close** or **Save** button at the top left hand corner of the screen. At this moment, you will receive your **Product SKU (Stock Keeping Unit)**. This SKU is created automatically using information you have supplied and can be used in the future for selling the product, creating purchase orders, receiving product, etc.
- This should be the last step in creating a new product. If you are satisfied with this click the **Save And Close** button on the toolbar.

