



Gift Card Overview

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Gift card vs. Gift certificate

Gift card

When this term is used in CoPOS, it indicates a Gift Card that has been prepaid for use by either the purchasing Member/Customer or another patron. This is sometimes referred to as a Declining Balance Gift Card (DBGC). Gift Card types can be added, edited, viewed, and merged using Option 4.13.

Related System Constants

83
122
123

Paper gift certificate

Paper Gift Certificates, or Gift Certificates, are terms that are often used interchangeably with Gift Cards. Paper Gift Certificates refer to any prepaid amount that is external to CoPOS. CoPOS does not track the use of Paper Gift Certificates at the register. However, Gift Certificates can be purchased at the register by using .G in the Item field.

Related System Constants

69
82

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Purchasing Gift Cards

Purchasing a Gift Card at the Register using F4

A DBGC can be purchased by a Member or Customer for themselves or someone else. This is done by pressing F4 and selecting Gift Card. You will be directed to the Enter/ Recharge a Gift Card screen where you can proceed with the Gift Card Entry. If System Constant 123 is set to Y, you will be prompted to use the purchased Gift Card in the current sale.

Related System Constants

83
122

Purchasing Unlinked Gift Cards

An unlinked Gift Card can be purchased in Option 1.4.1 by entering G/unassigned# or N/unassigned# in the Purchased For field. Purchasing Gift Cards this way will result in the balance becoming lost if the User and/or Customer does not retain the Gift Card number.

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Gift Cards by Raffle

This feature is a work in progress. Please review Release Notes for each Update to learn the status of this feature.

CoPOS can generate Gift Cards for Members selected “raffle style” through the Sales Query. After a Sales Query is compiled Users can select the Poll option from the choice bar. They will be asked to specify the number of Members to randomly select for the raffle. These Members will need to be saved to a List for use in the Gift Card Options menu. Type *POLL in the Purchased for field of Option 1.4.1 to assign Gift Cards.

Gift Cards for Patronage

Users must begin by compiling a list of Members eligible for patronage in Option 7.22. The list should be exported to Drive D. Once this is done the User can return to Option 1.4.10 and select the exported file from Drive D.

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Payments

Payment using Declining Balance Gift Cards

The User is prompted to use the Member/Customer’s Declining Balance at the beginning of a sale. If the User selects “Yes” then the DBGC balance is displayed to the right of the Member name. If the amount of the sale is less than the balance remaining on the DBGC then the sale can be recorded by pressing Enter. The DBGC can still be used if the User selects “No” at the beginning of the sale. This is done by pressing g in the other field or manually entering the amount in the Gift Certificate field.

Payment using Paper Gift Certificates

Payment by Paper Gift Certificate can only be done if the Member/Customer does not have a DBGC. This requires that System Constant 69 be set to Y and that System Constant 82 be set to N. Payment is recorded by pressing g in the other field or manually entering the amount in the Gift Certificate field.

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Multiple Gift Card Types

Users can have multiple Gift Card types. Funds from all Gift Card types are displayed as a single balance at the Register. Gift Card related reports can be restricted to a specific Gift Card or to Gift Card types. These reports include:

- 1.4.1
- 1.4.8
- 1.4.9

Refunding Gift Cards

A User can refund all or a portion of a DBGC. This option can be used when a sale is attached to a DBGC, which prevents it from being deleted. Gift Card refunds are recorded on the Daily Sales Recap.

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Link a Gift Card to a Member or Customer

This Option can be used to link DBGC's purchased without an assigned Member or Customer. Users will need to know the number of the Gift Card to be linked. This information can be found in the Sales Query if the DBGC was sold at the register. The Gift Card Inquiry/Activity Reports can also be used to determine DBGC's purchased within a date range that remain unlinked.

Merge Two Gift Cards into One

This Option can be used to merge DBGC's for two different Members/Customers into one. Once Gift Cards are merged the Gift Card entered in the Merge Gift Card field will no longer be referenced in CoPOS. All of its attributes will be assigned to the Into Gift Card.

Inactivate/Reactivate a Gift Card

DBGC's that have been inactivated cannot be viewed at the register. They retain their funds until they are reactivated for use or refund.

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Remember!

The use of Declining Balance Gift Cards and Paper Gift Certificates is mutually exclusive.

You must collect payment after selecting "Add to this Gift Card's Balance".

View all open Gift Cards at the register by entering G/ or N/ in the Member field.