



RMH GIFT VOUCHERS GUIDE

Retail Management Hero (RMH)

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Support is provided through the RMH support system: <http://support.rrdisti.com/account/login>.

RMH Product Website: www.rmhpos.com

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Retail Management Hero Gift Vouchers

Overview

Vouchers in Retail Management Hero (RMH) can include gift certificates and gift cards. The voucher holder can spend any amount up to the voucher's limit. A gift card is like a debit card. Customers pre-pay an amount towards the gift card. When the customer uses the gift card, the purchase amount is deducted from the card. Gift cards can be renewed with an additional pre-payment.

NOTE: To define the expiration date for vouchers, click the **Configuration** option in the **File** menu, click the **Tender** tab, and then enter the number of days the customer has until the voucher expires.

Voucher Configuration in Back Office Manager

Creating a Voucher Item

Before you can sell vouchers at the point-of-sale, you need to create both the voucher item and the voucher tender type. This way, you can track them as items you sell and when they are redeemed. If a customer loses a voucher, the cashier can also transfer credit from the existing voucher to a new one.

To create a Voucher Item:

1. Open the **Manager** program.
2. On the **Database** menu, click **Items**, and then click **New**.
3. Click **Standard**, and then click **OK**.
4. On the **General** tab, enter the **Item Lookup Code** and **Description** (e.g., "Gift Card").
5. In the **Item Type** box, select **Voucher**.
6. Click the **Serial** tab. Use this tab to enter the voucher (serial) numbers.
7. Under **Serial number count**, select **1 serial number**, and then click **Add**.
8. In the **Serial Number Properties** dialog box, enter the voucher number in the **Serial number 1** box, and then click **OK**.
9. Click the **Pricing** tab.
10. If you are selling vouchers that have pre-defined amounts (\$25.00, \$50.00), you can enter an amount in the **Price** field. You must create a new voucher item for each pre-defined amount. If you are not selling vouchers with pre-defined amounts and want to enter the amount at the point-of-sale, set the **Price** to \$0.00. Also, select the **Must enter price at the POS** check box on the **Options** tab. Store Operations will then require the cashier to enter a price for each voucher sold.
11. Click the **Inventory** tab, and either confirm or modify the quantity you have in stock.

TIP: To quickly add multiple voucher numbers, select the **Automatically generate serial numbers** check box, and then, in the **Number to create** box, enter the number of voucher numbers you want to create. You can also specify a starting voucher number in the **Start S/N 1 with** box and a voucher number prefix in the **Serial 1**

Prefix box. (The **Serial number 1** box changes to the **Serial 1 Prefix** box when you select the **Start S/N 1 with** check box.)

Before customers can redeem vouchers, you must create a voucher tender type.

Creating a Voucher Tender Type

1. On the **Database** menu, click **Tender Types**. The **Tender Types** dialog box appears.
2. Click **New**.
3. In the **Description** box, enter a name (i.e., Gift Card).
4. In the **Tender code** box, enter a unique code (i.e. GC).
5. In the **Tender type** box, select **Voucher**.

You can now sell and redeem vouchers at the point-of-sale.

Linking Voucher to a Tender

You can link a voucher item to a voucher tender type via the item properties -> **Voucher** tab. See following sample figure:

Substitutes	Special	Serial	Kit	Options
General	Inventory	Pricing	Discounts	Commission
Voucher				
Options			Numbering	
<input type="checkbox"/> Item can not be sold			<input checked="" type="radio"/> Cashier entered	
<input type="checkbox"/> Item can not be returned			<input type="radio"/> Auto generated	
Linked Tender			Make voucher numbers recognizable by using a voucher number format. To require numbers of a certain length, type # for each digit in the number (ex. #### gives 0001, etc.). You can also type specific characters where desired (ABC001-### gives ABC001-001, etc.)	
Coupon			Number Format	
			Sample	
			0	

Use the tab to configure the following options:

- Options
 - **Item cannot be sold:** If selected, an item will not appear in the item list and you cannot issue it from the POS screen. The specific item will be treated as a store credit and you can issue it during the refund of money.
 - **Item cannot be returned:** If selected, you cannot return vouchers that are once issued. For example, you have bought two items: R/C glider and global gift card. In case of the latter item, global gift card, you have selected **Item cannot be returned**. At the time of returning the transaction you will be prompted with a message, "**Item GC cannot be returned.**" Here GC is Item Lookup Code.
 - **Linked Tender:** This list will consist of the Voucher tender type. The linked tender will only display those tender types for the Local voucher, which are not linked to a Global voucher.

- Numbering
 - **Cashier Entered:** If selected, you can use the MSR or scanner to read the voucher number, or you can manually enter the voucher number.
 - **Auto Generated:** Select this option if you want to automatically create a voucher number whenever a voucher is issued by a cashier.
 - **Number format:** To specify the format for voucher numbers, type numbers, letters, and symbols in combination. Type a # symbol for each digit of the voucher number. Sample displays the effect of what you specify. See the examples in the following table:

Number format	Voucher number
####	0001
GC100####	GC100-0001
GC4#	GC41
GC4###	GC4001

Voucher Operations at the POS

Selling a Voucher

1. To select a Voucher to sell, you can either scan the voucher or manually enter the item lookup code for the voucher and then find the serial number you want to issue to the customer.
2. When looking up a Voucher by serial number, scroll/select or look up the applicable voucher number using the *Serial Number Lookup* search box. When the exact serial number match is found, only the voucher whose number is matched appears in the following grid.

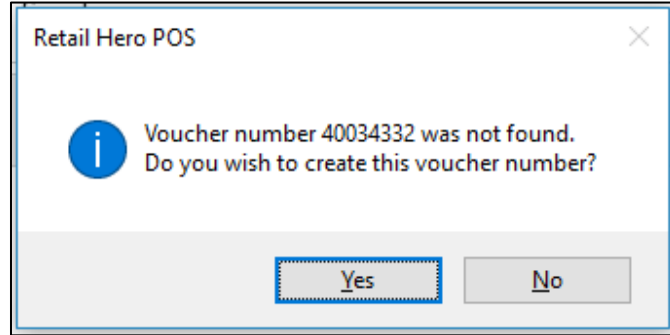
Select Serial Number

Code: COUPON
Description: Promotional Coupon

Show Sold Serial

	Number 1	Status
✓	300309	Sold

3. If a match is not found, the application will open a screen notifying you that the voucher number was not found and prompting the user to enter a new serial number.



4. If the voucher has a pre-defined amount, that amount will appear on the transaction screen. If, however, you have selected the **Must enter price at the POS** option, the application will display a window where you can enter the desired price for the voucher and press **Enter**.
5. After you ring up the voucher item, you can enter additional items or press F12 to tender the sale.

Checking a Voucher Balance

Use the **Ctrl-Shift-F3** keys to display the balance for a particular voucher. See following sample figure:

Check Voucher Balance

Number

Voucher #	Description	Balance	Expiration Date
300309	Promotional Coupon	\$100.00	3/8/2017

You can also click the **Details** button to view the transaction history details for that voucher.

Voucher Details

Voucher: Promotional Coupon
Voucher Number: 300309
Balance: \$100.00

Trans #	Amount	Date
137	\$41.92	11/8/2016
133	(\$41.92)	11/8/2016
132	\$100.00	11/8/2016
131	\$0.00	11/8/2016

OK

Redeeming a Voucher

After you sell a voucher (gift card, gift certificate), the customer can then use it for purchasing items in your store. Ring up the voucher just like a serialized item, however, use the voucher tender type to tender the sale.

1. Scan or manually enter the item(s) the customer wants to purchase.
2. Press **F12** to display the Tender window.
3. In the **Voucher** tender type box, you can enter either a partial or entire amount of the voucher that will be used towards the sale. If the customer wants to pay with both cash and voucher, enter the applicable amount in the appropriate tender type boxes.
4. Press **Enter** to display the **Voucher Verification** window.
5. Enter the applicable voucher number, and then press **Enter**. See following sample figure:

Voucher Verification

Tender: Coupon
Amount: \$18.61
Number:

Voucher #	Description	Balance	Expiration Date	Status
300309	Promotional Coupon	\$100.00	3/8/2017 11:34:21 AM	Sold

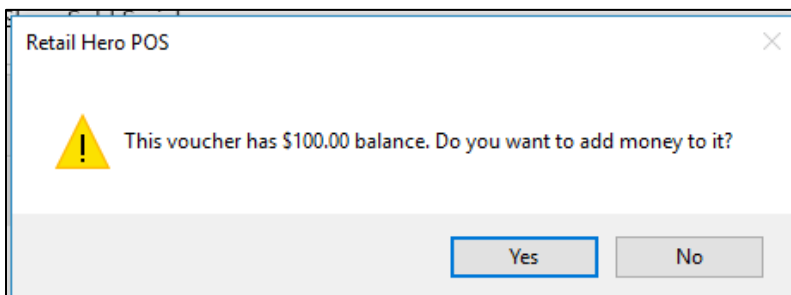
Select Cancel

NOTE: At any time, you can press **Ctrl-Shift-F3** to display the Voucher Details window on which you can enter the applicable voucher (serial) number and press **Enter**. You will then see that voucher's history. Use this feature to check the customer's voucher balance.

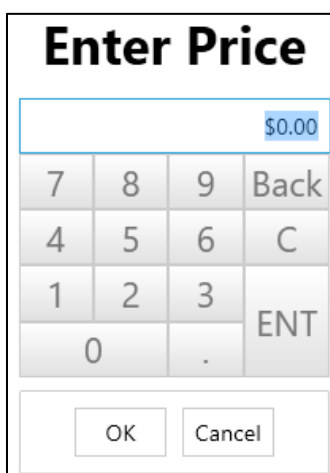
Adding Money to a Voucher

You can only add money to a voucher that has been already sold.

1. To select a sold Voucher to add money to, you can either scan the voucher or manually enter the item lookup code for the voucher and then find the serial number.
2. When looking up a Voucher by serial number, scroll/select or look up the applicable voucher number using the *Serial Number Lookup* search box. When the exact serial number match is found, only the voucher whose number is matched appears in the grid.
3. Select the found voucher. A pop-up window appears, displaying the voucher balance and prompting you to confirm that you want to add money:



4. Enter the amount you would like to add:



5. Tender the transaction.

Refunding to a Voucher

When processing a return, you can refund all or part of the funds to a voucher. The following workflows exist:

Refunding to an existing voucher:

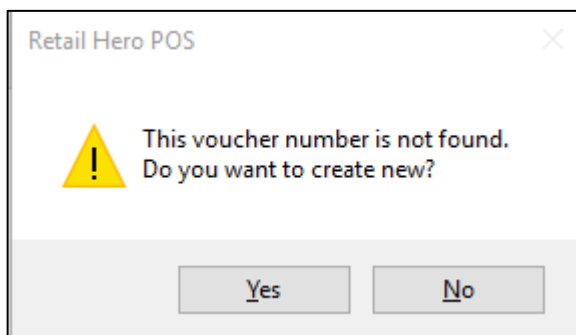
1. Select **Recall for Return (F11)**, select the sale you would like to return, and then click **Add**.
2. Select the **Reason Code**, and then click **OK**.
3. Select **Tender the Transaction (F12)**.
4. Enter the full or partial amount against the Voucher Tender type associated with the Voucher you would like the refund to go to.
5. When the Voucher Refund Verification screen displays, scan or enter the serial number of the voucher you would like to refund to.

NOTES:

- If there are multiple voucher items linked to that tender, the user will be prompted to select the correct voucher item
- If the voucher has not been already sold, the transaction will automatically change the status of the voucher item to sold

Refunding to a voucher that has not been created:

1. Select **Recall for Return (F11)**, select the sale you would like to return, and then click **Add**.
2. Select the **Reason Code**, and then click **OK**.
3. Select **Tender the Transaction (F12)**.
4. Enter the full or partial amount against the Voucher Tender type associated with the Voucher you would like the refund to go to.
5. When the Voucher Refund Verification screen displays, scan or enter the serial number of the voucher you would like to refund to.
6. When the confirmation pop-up window displays, click **Yes**.



NOTE: If there are multiple voucher items linked to that tender, the user will be prompted to select the correct voucher item after the last step above.