



Information Integration Group, Inc.

## Point Of Sale / Fast Sale For MAS 90/200

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**GOLD**

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## Installation Instructions and Cautions

**PLEASE NOTE: MAS 90** must already be installed on your system before installing any IIG enhancement. If not already done, perform your MAS 90 installation and setup now; then allow any updating to be accomplished automatically. Once MAS 90 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

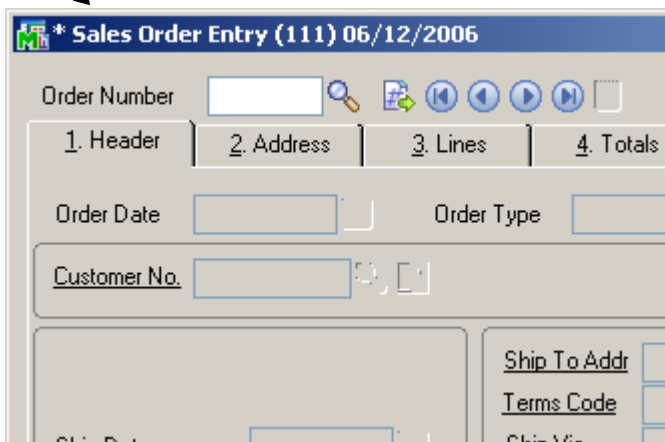
### Wait! Before You Install – Do You Use CUSTOM OFFICE?

**THIS IS AN IMPORTANT CAUTION:** If you have Custom Office installed, **and** if you have modified any MAS 90 screens, you must run **Customizer Update** after you do an enhancement installation.

**But wait! BEFORE** you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. **Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update!**



Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the MAS 90.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement Name	4.20		AAAAAAAAAAAAAAAAAA	BBBBB

Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

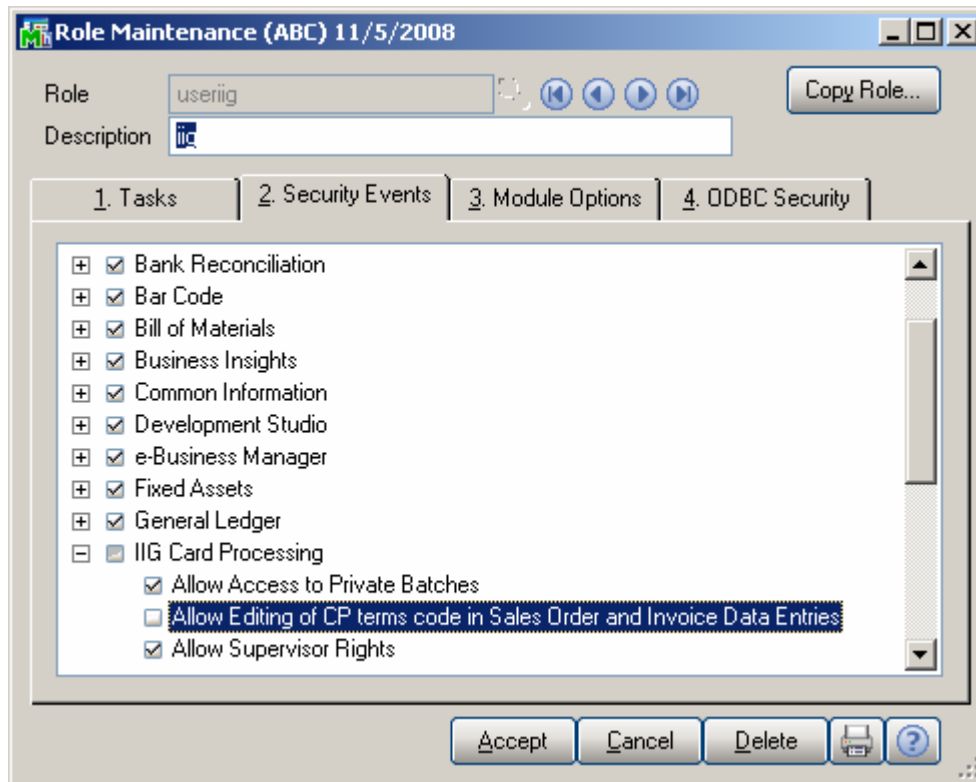
If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

## Role Maintenance

After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.

The **Allow Editing of CP terms code in Sales Order and Invoice Data Entries** task has been added to the **IIG Card Processing** menu.



## Introduction

IIG's Point Of Sale/Fast Sale Enhancement allows user to conduct more streamlined sales transactions at working locations. Specific improvements allow quicker invoice transactions. Integration with IIG's Credit Card Processing allows fuller functionality and a wider range of payment and credit options.

## Fast Sale Data Entry

Select the **IIG Fast Sale Entry** program under the **Sales Order Main** menu.

Fast Sale Data Entry (ABC) 8/8/2007

Inv. No.  Date  Type

S/O No.  Customer No.

Salesperson

1. Lines | 2. Totals | 3. Header | 4. Address

Item Code	Ordered	Shipped	Unit Price	Extension	Co

Quick Row

Description	
Warehouse	
Unit Of Measure	
Back Ordered	.00

Total Amount

Quick Print Recalc Tax Defaults... Customer... Credit... Accept Cancel Delete

In this screen, the standard Sales Order/Invoice fields are rearranged to simplify data entry.

Some of the entry fields, which were originally on the **Header** tab of the **Invoice Data Entry** screen, are located at the top of the **Fast Sale Data Entry** screen.

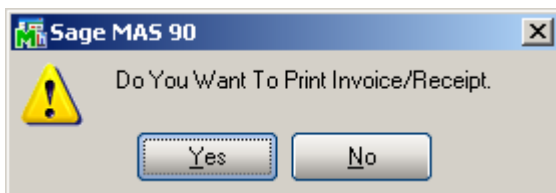
The **Quick Print**, **Customer**, **Credit** buttons are placed at the bottom of the screen.

Click the **Next Invoice No.** button to start new invoice, or select an existing Invoice Number using the **Lookup** button. If the selected Invoice refers to a Sales Order, the Sales Order Number is displayed in the **S/O No.** field, which is display-only.

If entering a new invoice, select **Customer**. Now the **Lines** tab is available for entering items. The **Lines** tab is identical to standard **Invoice Data Entry Lines** tab.

After filling out the information on the **Lines** tab, go to the **Totals** tab and Accept the invoice. Necessary changes can be made on the **Header** and **Addresses** tabs, too.

If the corresponding setting has not been changed in the Defaults (see later in the manual), when clicking the **Accept** button, a message is prompting to print invoice/receipt. Click **Yes** to print the invoice.





Search in Detail/Grid file for selected Item Code.

The **Item Code** field has been added on the **Lines** tab of **Fast Sale Data Entry** to be used for scanning.

Fast Sale Data Entry (ABC) 3/18/2009

Inv. No. 0100381 Date 3/16/2009 Type Standard Invoice Batch 00037

S/O No. 0000288 Customer No. 01-0000001 American Business Futures

Salesperson 0100 Jim Kentley

1. Lines 2. Totals 3. Header 4. Address

Item Code [ ] Quick Row 2

	Item Code	Ordered	Shipped	Unit Price	Extension	Co
1	1001-HON-H252	1.00	1.00	84.000	84.00	
2	1001-HON-H252LK	5.00	1.00	84.390	84.39	
3	6652-28-24-15	4.00	4.00	429.000	1,716.00	
4	8953	9.00	3.00	4.450	13.35	
5		.00	.00	.000	.00	

Description: HON 2 DRAWER LETTER FLE W/ LCK  
 Warehouse: 001  
 Unit Of Measure: EACH  
 Back Ordered: 4.00

Total Amount 1,813.35

Quick Print Defaults... Customer... Credit... Accept Cancel Delete

The program works depending on the **Auto Default Quantity Ordered to 1** check box.

The screenshot shows a dialog box titled "Default Values for Fast Sale Data Entry". It contains several input fields and checkboxes. The "Auto Default Quantity Ordered to 1" checkbox is checked and highlighted with a blue border. Other fields include "Next Invoice No." (0100383), "Invoice Date" (3/18/2009), "Invoice Type" (Standard Invoice), "Ship Date" (3/18/2009), "Warehouse" (001 EAST WAREHOUSE), and "Sales Tax Schedule".

Next Invoice No.	0100383		
Invoice Date	3/18/2009	Print Invoices	<input type="checkbox"/>
Invoice Type	Standard Invoice	Bypass Print (Y,N) prompt	<input type="checkbox"/>
Ship Date	3/18/2009		
Ship Via			
FOB			
Warehouse	001 EAST WAREHOUSE		
Sales Tax Schedule			
Auto Default Quantity Ordered to 1	<input checked="" type="checkbox"/>		
Auto Increment Invoice Number	<input type="checkbox"/>		
Process Sales Order	<input type="checkbox"/>		
Force For Full Payment	<input type="checkbox"/>		
Cash Customer			
Replace Customer Default Sales Person	<input type="checkbox"/>		

If the **Auto Default Quantity Ordered to 1** option is on, the Quantity Shipped Move grid is increased to display that line. Otherwise if the option is off, the **Item Code** field, caption, and lookup are disabled.

## Default Values for Fast Sale Data Entry

Before selecting the **Invoice Number** on the **Fast Sale Data Entry**, click the **Defaults...** button (at the bottom of the Fast Sale Data Entry screen).

Fast Sale Data Entry (ABC) 08/10/2006

Inv. No.  Date  Type  Batch 00014

S/O No.  Customer No.

Salesperson

1. Lines | 2. Totals | 3. Header | 4. Address

Quick Row

Item Code	Ordered	Shipped	Unit Price	Extension	Co
-----------	---------	---------	------------	-----------	----

Description   
Warehouse   
U/M   
Back Ordered  .00

Total Amount  .00

Quick Print Recalc Tax **Defaults...** Customer... Credit... Accept Cancel Delete

The **Default Values for Fast Sale Data Entry** screen allows for entry of the default values to speed up the entry of invoices. Several fields can be defaulted to these values, so that the user will not enter them repeatedly for each new invoice.

Default Values for Fast Sale Data Entry

Next Invoice No. 0100140

Invoice Date 8/8/2007 Print Invoices

Invoice Type Standard Invoice Bypass Print (Y,N) prompt

Ship Date 8/8/2007

Ship Via

FOB

Warehouse 001 EAST WAREHOUSE

Sales Tax Schedule

Auto Default Quantity Ordered to 1

Auto Increment Invoice Number

Process Sales Order

Force For Full Payment

Cash Customer

Replace Customer Default Sales Person

OK Cancel ?

The **Next Invoice No.** field displays the number to be assigned to the next invoice by clicking the corresponding button on the **Fast Sale Data Entry** screen.

The **Invoice Date**, **Invoice Type**, **Ship Date**, **Ship Via**, **FOB**, and **Warehouse** fields are similar to standard Invoice Data Entry.

The **Sales Tax Schedule** is the current Point of Sale tax schedule. Entry in this field, if any, will overwrite the customer's tax schedule.

Fast Sale Data Entry (ABC) 08/10/2006

Inv. No. 0100165 Date 08/10/2006 Type Standard Invoice Batch 00014

S/O No. Customer No. Salesperson

1. Lines 2. Totals 3. Header 4. Address

Quick Row 1

	Item Code	Ordered	Unit Price	Extension
1		.00	.000	.00

Description Warehouse U/M Back Ordered

Total Amount .00

Quick Print Defaults... Customer... Credit... Accept Cancel Delete

Check the **Auto default quantity ordered to 1** box to automatically fill in the single quantity, pricing, and accept line when an item is selected.

Check the **Auto increment invoice number** box to assign automatically the next available invoice number after acceptance of previous invoice.

Check the **Process Sales Orders** box to make the **S/O No.** field available to allow the user to create invoices based on the existing sales orders.

Check the **Force for full payment** box to require full payment to accept an invoice. This option works only if IIG's Credit Card Processing module is integrated with MAS 90. If this box is checked, clicking the **Totals** tab

displays the **Deposit/Prepayment Entry** screen. The program will not accept the invoice till the payment is less than the entire invoice amount.

Select the default **Cash Customer**. To select this default Customer for the current invoice on the Fast Sale Data Entry screen, click the \$ (dollar) button next to the Customer No. field.

Check the **Replace Customer's Default Salesperson** box to activate the **User Logon** field. Select the User, which will replace the Salesperson for all the Customers not having Primary Ship To. The user will be added as new Salesperson to the system. The Salesperson Name field will contain 28 characters: 14 from the User's first name and 14 from the last name.

Default Values for Fast Sale Data Entry

Next Invoice No. 0100141

Invoice Date 8/8/2007 Print Invoices

Invoice Type Standard Invoice Bypass Print (Y,N) prompt

Ship Date 8/8/2007

Ship Via

FOB

Warehouse 001 EAST WAREHOUSE

Sales Tax Schedule

Auto Default Quantity Ordered to 1

Auto Increment Invoice Number

Process Sales Order

Force For Full Payment

Cash Customer

Replace Customer Default Sales Person

User Logon CCP First Name User CCP Last Name User CCP

OK Cancel ?

The **Default Salesperson** field will display the User Logon on the **Fast Sale Data Entry** screen:

Fast Sale Data Entry (ABC) 8/8/2007

Inv. No. [ ] Date [ ] Type Standard Invoice

S/O No. [ ] Customer No. [ ]

Salesperson [ ] Default Salesperson CCP

1. Lines 2. Totals 3. Header 4. Address

Quick Row 1

Item Code	Ordered	Shipped	Unit Price	Extension	Co
-----------	---------	---------	------------	-----------	----

Description  
Warehouse  
Unit Of Measure  
Back Ordered

Total Amount .00

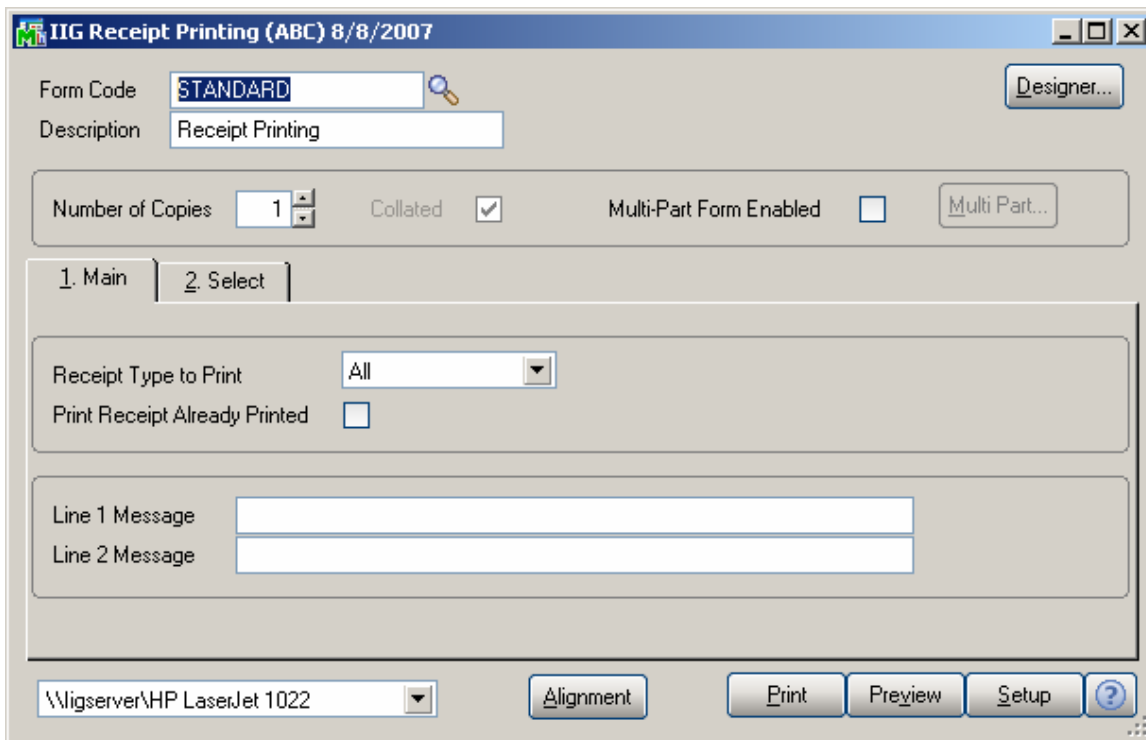
Quick Print Recalc Tax Defaults... Customer... Credit... Accept Cancel Delete

Check the **Print Invoices** box to print the invoices when accepting them.

If the **Print Invoices** box is checked, the **Bypass Print (Y/N) prompt** box can be checked to print documents without asking for confirmation.

## Fast Sale Receipt Printing

The **IIG Fast Sale Receipt Printing** program has been added under the **Sales Order Main** menu.



Here is an example of printout:



View IIG Receipt Printing

powered by crystal

Preview

ABC Distribution and Service Corp. 1

Mon - Fri 9 to 5 Sat 10 to 2

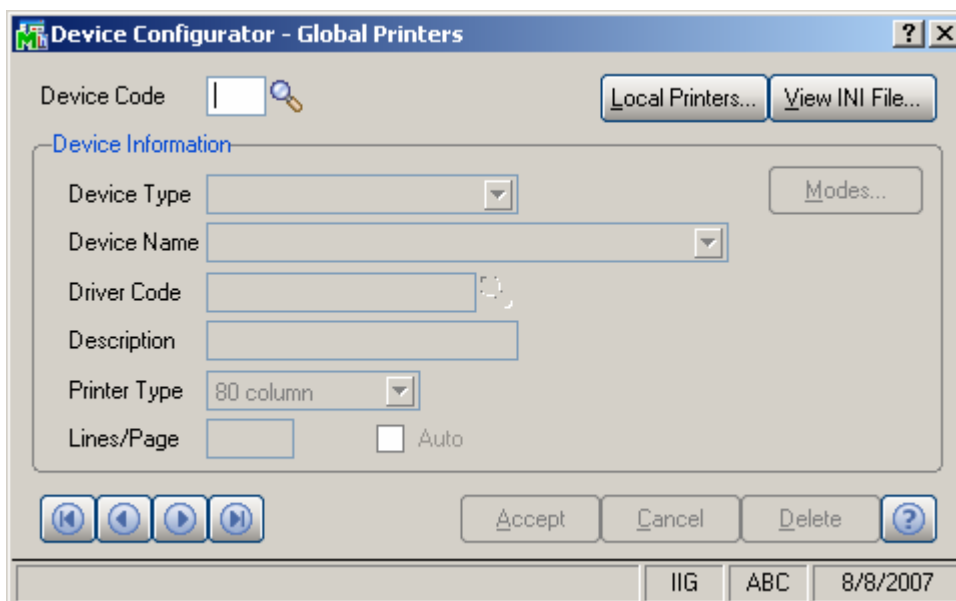
Inv Nbr. 0100239-IN 08/17/2006 01-ABF

HON 2 DRAWER LETTER FLE W/O LK			EACH
1001-HON-H252		<b>Whse:</b>	001
	2.00	84.00	168.00
DESK FILE 8" CAP 50			EACH
2480-8-50		<b>Whse:</b>	001
	3.00	34.95	104.85
<b>Lot Number:</b> JAN10			3.00
DESK FILE 3 1/2" CAP 50			EACH
2551-3-50		<b>Whse:</b>	001
	5.00	24.20	121.01

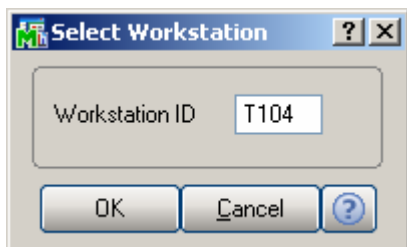
## Receipt Printer Setup

Setting up the receipt printer is a key element of satisfactory Point Of Sale operation. We recommend the following:

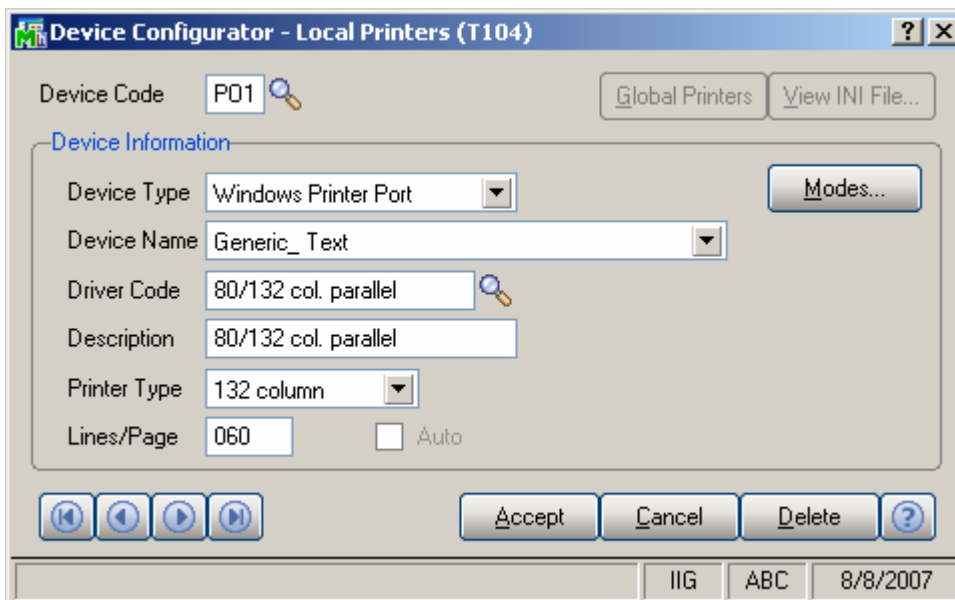
1. Connect the receipt printer as a local printer (directly to the workstation).
2. Go to **Library Master, Setup, and Device Configurator**.



3. Click on the “**Local Printers...**” button to set up the receipt printer as a unique local printer. The Workstation name will be automatically displayed for the Workstation ID. Delete it and enter your current Terminal ID (without T) available from **IIG Card Processing/Setup/Terminal Control Maintenance program**. Click **OK** to accept the workstation ID. We recommend configuring the receipt printer from that workstation.



4. Enter a unique printer **ID**. This printer ID must be unique for the system, not the terminal. Due to the limits of Windows, two different workstations may not have the same printer ID. This means that you can't set up LP1 as the local workstation printer if LP1 is already used on another workstation or is set up as a Global Printer. Our recommended method is to use either "L" or "P" plus the last two digits of the workstation. In this example, it would be P01 or L01.

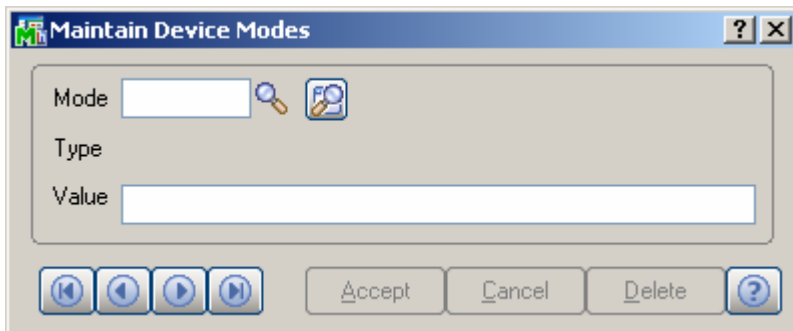


5. Device type would be Windows Printer Port. Under Windows 2000 and higher, you no longer can print directly to the parallel port. We suggest setting up a Generic Text Printer for your receipt printer. In this case, we've set up the printer "Generic\_text".

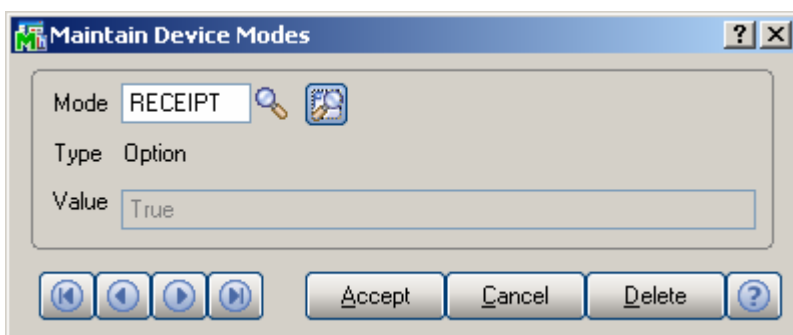
6. For **Driver Code**, use "80/132 parallel printer."

7. Set **Printer Type** to 132 columns. Lines/Page will default to 60. This is okay.

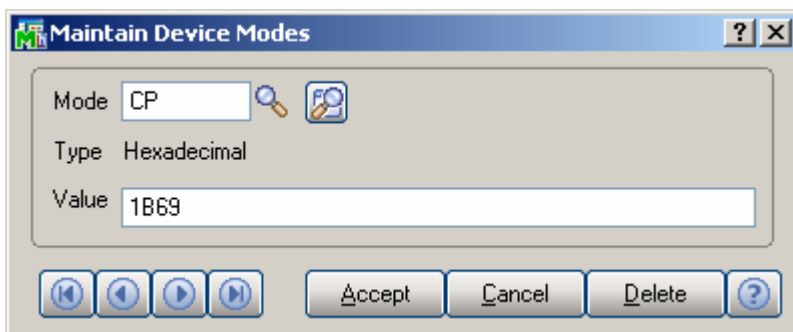
8. Now click on the **Modes...** button.



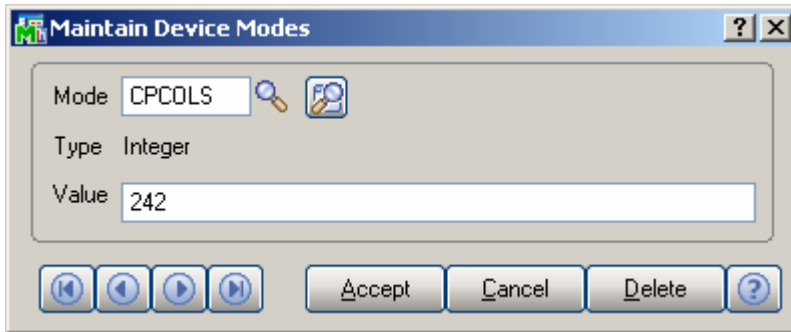
9. Add **RECEIPT** mode to this printer. This is critical for proper retail operations.



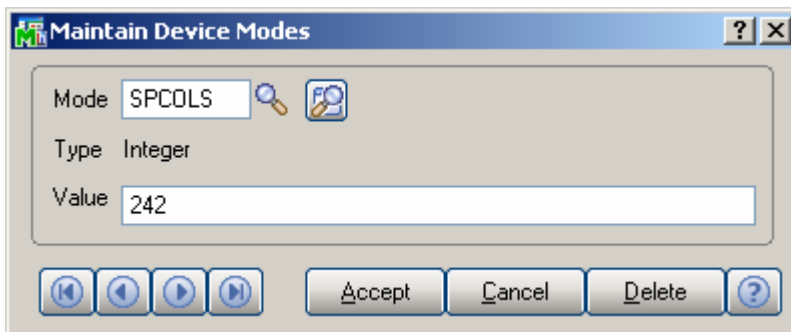
10. Change the CP mnemonic to the **Cut Paper** command for your receipt printer. See the table at the end of this document for the **Epson T88ii printer** recommended by IIG. If you are using a different printer, consult that printer's manual or that printer's manufacturer for the correct code.



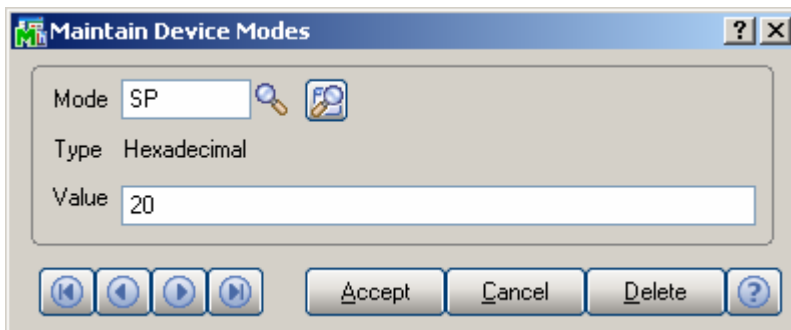
11. Change the CPCOLS setting to 242.



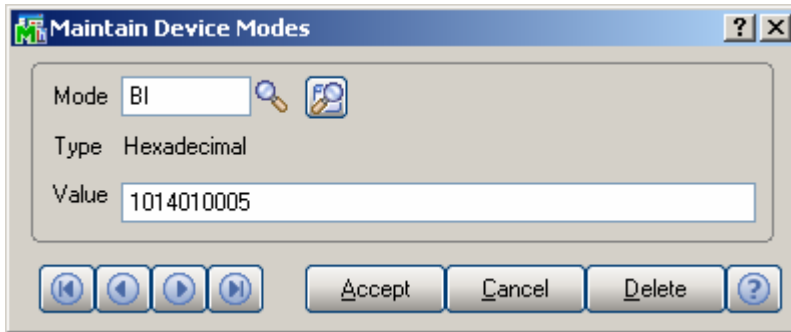
12. Change the SPCOLS setting to 242.



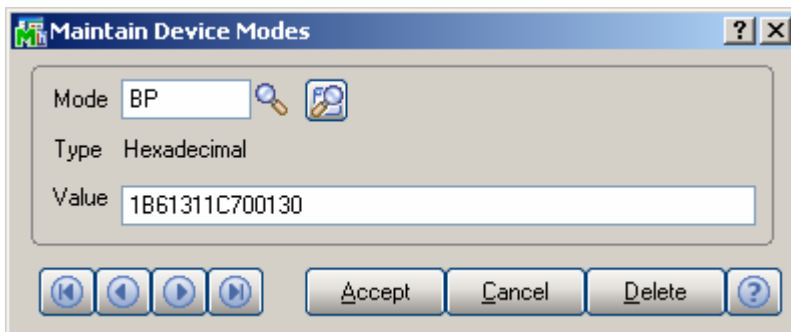
13. Delete the SP mnemonic or use 20 for the space setting.



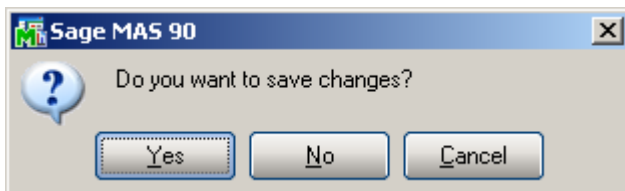
14. Add the mnemonic BI (Bee Eye) with the code to open the cash drawer (AKA the "drawer kick" code).



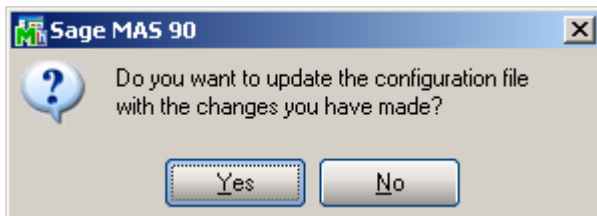
15. If you purchased the custom logo option, then add the mnemonic BP, which will instruct the printer to print the logo at the start of the receipt.



16. Click on the "X" in the upper right hand corner to exit the Maintain Device Modes



17. The program will then ask you to confirm the new changes.



18. Click **Yes** to save the changes.

19. In the next step, you will list the forms of payment acceptable at this register, and for which the cash drawer should open.

20. Go to the **IIG Credit Card Setup Menu**, and select **C/C Payment Type Maintenance**.

The screenshot shows the 'IIG C/P Payment Type Maintenance' window. At the top, there are search fields for 'Payment Type' (containing 'MC') and 'Description' (containing 'MASTER CARD'). Below these are several configuration options:

- Open Drawer For This Payment Type
- Use Mag Stripe For This Payment Type
- Default payment Amount To Balance Due
- Include This Payment Type In Bank Dep.
- User Defined Payment Data Entry Field 1: ACCOUNT NUMBER
- User Defined Payment Data Entry Field 2: ACCOUNT NAME
- User Defined Payment Data Entry Field 3: EXP. DATE
- User Defined Payment Data Entry Field 4: APPROVAL CODE
- Bank Code To Use For Payment Deposit: [Field with magnifying glass]
- Debit Payments To G/L Account: [Field with magnifying glass]

At the bottom of the window, there are summary statistics for 'Current Period: 5':

	Period To Date	Year To Date
Payments Received:	.00	.00
Payments Refunded:	.00	.00

Navigation buttons include back, forward, and search icons, along with 'Accept', 'Cancel', 'Delete', and a printer icon. The status bar at the bottom right displays 'IIG ABC 8/8/2007'.

21. In **C/C Payment Type Maintenance**: check the “**Open Drawer for this Payment Type**” option for each payment code representing a payment type you will accept cash or receipt tickets that requires opening the cash drawer.

22. In the **Credit Card Options** screen, under the **Credit Card Setup** menu, check **Register Processing**. This is required for cash drawer processing.

23. Under the **Credit Card Setup** menu, select the **Terminal Control Maintenance**.

**Terminal**

Terminal ID: T102    Description: POS Example

Register ID: T102    Location: Front counter

POS/Register Terminal:

Credit Card Allowed in Sales Order:     Credit Card Allowed in HTI POS:

Credit Card Allowed in Invoicing:     CC Swipe Reader Installed:

Default Merchant Code (Swiped): 0000    Name: \_\_\_\_\_

Default Merchant Code (Keyed): 0000    Name: \_\_\_\_\_

Merchant Code Gift Cards: 0000    Name: \_\_\_\_\_

**IIG POS/Fast Sale Setup**

Receipt Printer Only?

Receipt Printer Test: P01    Receipt Printer

Print Receipt Message: (none)

Receipt Message File: P01 \MAS\ENHANCEMENTS\430\POS\MAS9    Show Text

Buttons: Accept, Cancel, Delete

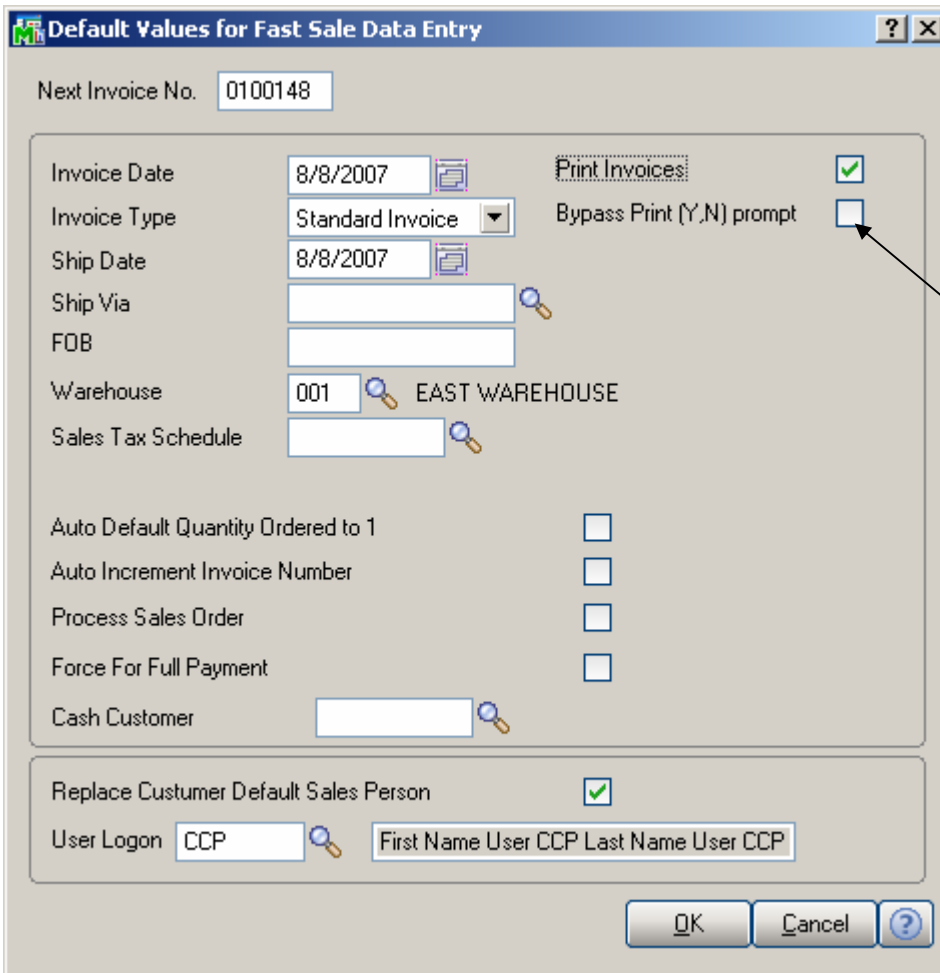
Status: IIG ABC 2/24/2009

- a. If you are on the terminal that will be printing the receipts, click on the terminal icon to select the correct terminal.
- b. In the **IIG POS/Fast Sale Setup** section, you may check **“Receipt Printer Only”**, which will only allow printing to the receipt printer.
- c. Select the **Receipt Printer** from the list that shows in the drop box for that station. The program will verify that the printer selected is a receipt printer based on the printer setup done in step four.
- d. Click Accept to save these changes.

24. Now, go to the **Sales Order Main Menu**, and select **Fast Sale Entry**. If Fast Sale is set for Auto Increment Invoice Number, you will need to cancel the invoice to enable the Defaults screen.



25. In the **Fast Sale Defaults**, uncheck the **“Bypass Print”** box.



Select or create a transaction, and process it through until the print dialog appears. Select the local printer you defined for this workstation and print the receipt document. Now go back into **Fast Sale Defaults**, and check the **“Bypass Print”** box again. The receipt printer will stay selected for future use. Codes used for the Epson TM88II printer:

Printer Mode	Description	Hex Code
BP	Print logo	1B61311C700130
BI	Open cash drawer	1014010005
CP	Cut paper	1B69

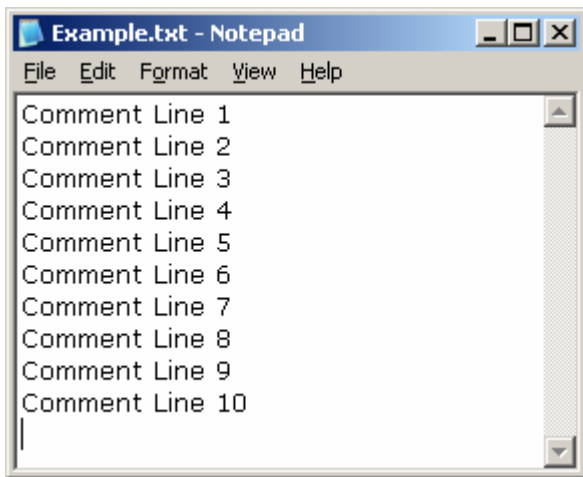
## IIG C/P Terminal Record Maintenance

The “**Print Receipt Message?**” check box, **Receipt Message File** field, and **Select Receipt Message File** and **Show Text** buttons have been added to **IIG C/P Terminal Record Maintenance**.

Select the “**Print Receipt Message?**” check box to activate the **Receipt Message File** field with **Select Receipt Message File** button. The **Select Receipt Message File** defaults to showing files with the extension of “.txt”. When a file is selected the **Show Text** button will be also activated which opens the selected file for review.

*Note: the user must use **Notepad** or a similar text editor. Using Microsoft **Word**, **WordPad**, or **Excel** will create an invalid file.*

Here is an example of “.txt” file opened:



*Note: This file's information can be any length, but should be formatted for the receipt printer (e.g. should be no more than 40 characters wide for each line). There can be a different text file for each company and terminal.*

The **Receipt Printing** program has been modified to print the selected file's lines at the end of the Receipt Printing.

**View IIG Receipt Printing** powered by crystal

100% || ◀ ▶ || 🔍

Preview

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2

ABC Distribution and Service Corp.

Mon - Fri 9 to 5 Sat 10 to 2

Inv Nbr. **0100348-CM**      9/18/2008      **01-ABF**

---

HON 2 DRAWER LETTER FLE W/O LK	<b>Whse:</b>	001	EACH
1001-HON-H252	-2.00	84.000	-168.00

CASH Appv: YDEMO APPROVAL-R 30.00

CASH Appv: YDEMO APPROVAL-R 2.00

---

0100	Sub-Total	-168.00
	Discount	0.00
	Sales Tax:	0.00
	Freight:	0.00
	Payments	-32.00
	<b>Balance</b>	<b>-136.00</b>

Comment Line 1  
 Comment Line 2  
 Comment Line 3  
 Comment Line 4  
 Comment Line 5  
 Comment Line 6  
 Comment Line 7  
 Comment Line 8  
 Comment Line 9  
 Comment Line 10

The **PRINT RECEIPT MESSAGE** and **RECEIPT MESSAGE FILE PATH** columns have been added to the **Terminal Control Listing**.

ABC Distribution and Service Corp.  
C/P TERMINAL CONTROL LISTING By Terminal ID

TERM. ID	DESCRIPTION/ LOCATION	POS REGISTER	MERCHANT CODES	CC SWIPE READER	ALLOW CC PROCESSING IN POS? S/Os? INW?	TERM. REG.	RECEIPT PRINTER	FORM CODE	PRINT RECEIPT MESSAGE
T101	Term IIG37	N	0000 0000 0000	N	N Y Y	T101	PO1	1	Y
T102	POS Example Front counter	N	0000 0000 0000	N	Y Y Y	T102	PO1	1	Y
T103	Current Terminal ARMEN ARMEN	N	0000 0000 0000	Y	Y Y Y	T104	PO1	1	N
T104	POS Example Front counter	N	0000 0000 0000	N	Y Y Y	T104		1	N

RECEIPT MESSAGE FILE PATH

## Appendix

### Gift Certificate Processing in IIG Credit Card and IIG POS

Processing Gift Certificates requires tracking the liability the store has generated by accepting payments in advance, which is really what a gift certificate is. There are several methods, with pros and cons for each.

One issue that we must stress is that Gift Certificates have a fairly long life. There are both Federal and State statues that cover how long these must honored, and what the merchant may do to limit the liability. We suggest that you consult an experienced business attorney for your store (or stores) area on what requirements you must meet for gift certificates.

#### Preprinted Gift Certificates:

These are generally in fixed denominations in logical steps (5, 10, 20, 25, 50, etc.) with a certificate number that is sequential. These are loaded into the system as a serial number item (ex: GIFTC05, serial number A000152). This allows you to see all non-issued certificates.

When sold at the register, the operator selects the correct certificate denomination and the serial number on the sheet. She would sell as many as the customer needed.

When the certificate was redeemed, it would be treated as a miscellaneous payment type of GIFTC. To redeem:

1. Set up a GIFTC payment type, and use the Gift Certificate number as the check/account number.
2. Use a different Bank or G/L code to reconcile at the end of the week or month.
3. Any balance remaining on the certificate would be paid out in cash.

Some issues to consider:

- With today's printers and scanners, it is easy for criminals to forge US currency, let alone something simple like a gift certificate. You will need to keep tight control over the number of gift certificates you have in circulation.
- The same holds true internally. Gift Certificates are just like checks, and just like checks, you must keep track of what was issued and what is remaining.

- Gift certificates cost money to print, process, and redeem, in the form of labor and the certificates themselves. We suggest that you keep a close eye on these costs, because in most retail markets, there isn't a whole lot of room in the margin.

#### On Demand Gift Certificates:

These are generated using the Sales Order Invoice function, and using a custom form to print the certificate. We recommend printing on check stock, where the lower third is the gift certificate, and the upper two sections (stubs) would print a duplicate receipt of the monies received. Unlike the pre-printed gift certificates, you must process these individually, because the invoice is the certificate.

Because these are generated "on demand" you won't be able to track them as serialized inventory. So you would use either a generic item number (GIFT CERT) or a miscellaneous item or charge.

Redeeming them is the same as with pre-printed gift certificates.

Some issues to consider:

- We strongly suggest that you turn on the Retain Detailed Invoice/Shipping History, Retain Deleted Invoices, and Retain Comment Lines in History as a precaution.
- Periodically review the value of sold gift certificates versus redeemed gift certificates. This is your Open Gift Certificate Liability.

#### Special Gift Certificate Programming

IIG can assist you with programming to meet your specific industry and business needs, and we are also happy to assist you or your reseller in setting up Gift Certificate Processing.

#### Gift Card Processing:

Gift card processing is quite different from Gift Certificates. Gift Cards fall into two categories:

- Rewritable, which requires special equipment to write the value of the amount and the amount remaining on the card.
- Gift processor, which the gift card is treated like a credit card through the credit card software.

Both of the above require special setup. Contact IIG for more information.