# datacandy

# Gift & Loyalty: Transaction Guide

For Verifone Terminals

NOTE 1:  If the transaction option you're looking for is not displayed on the screen, select the **DOWN ARROW** or **MORE** to scroll down through the menu.

NOTE 2:  Following a power interruption or re-initialization of the terminal, you will be prompted to enter the SUPER PASSWORD.

## Getting Started

1. Select **DATACANDY** on the touchscreen
2. If prompted, enter the SUPER PASSWORD (1234) and press **OK**.
3. You may be prompted to enter an EMPLOYEE ID and an EMPLOYEE PASSWORD.
   a. Enter your EMPLOYEE ID and press **OK**.
   b. Enter your EMPLOYEE PASSWORD and press **OK**.
4. You are now in the DataCandy menu.

## Accessing the Prepaid or Loyalty menu

From the DataCandy menu, select **PREPAID** or **LOYALTY**, and then swipe card.

## Checking the balance of a gift or loyalty card

**Verifies the balance on a card.**

1. Select **BALANCE**.
2. Swipe the card. If the card is de-magnetized, you can manually enter the card number.
3. The balance is displayed on the screen.
4. Press **OK** to print a receipt displaying the card balance.

## Activating a gift card

**Activates a gift/prepaid card with a specific amount.**

1. Select **ACTIVATE**.
2. When prompted, swipe the card through the reader.
3. Enter the transaction amount and press **OK**.
4. An invoice number is automatically generated. Press **OK** to use this number, OR enter a new number to override and press **OK**.
5. A receipt is printed.
* Use the **REPRINT** function from the DataCandy menu if you want to print a copy of the customer's receipt.

## Reloading a gift card

**Adds an amount to a previously activated gift card. This function is only available on prepaid/gift cards that are rechargeable.**

1. Select **RELOAD**.
2. Swipe the card.
3. Enter the transaction amount and press **OK**.
4. Enter the invoice number and press **OK**.
5. A receipt is printed.

## Reimbursing a gift card balance

**Where required by law (Ex. Province of Quebec). Cardholders with a remaining balance of 5.00$ or less who request it, must be reimbursed in cash. This transaction will empty the card.**

1. Select **CASH REMITTANCE**.
2. Swipe the card.
3. A receipt is printed.

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## Adding loyalty points

**Accumulates points on a loyalty card.**

1. Select **ACCUMULATE**.
2. Swipe the card.
3. Enter the transaction amount before taxes and press **OK**.
4. Enter the invoice number and press **OK**.
5. A receipt is printed.

## Paying with a gift or loyalty card

**Allows a cardholder to pay for a purchase with the amount on the prepaid/gift card or to pay with their accumulated dollar/point.**

1. Select **REDEEM**.
2. Swipe the card.
3. Enter the transaction amount and press **OK**.
4. Enter the invoice number and press **OK**.
5. A receipt is printed.

## Cancelling part of a transaction

**Partially cancel a previous gift or loyalty card transaction.**

NOTE: You must have the original receipt with the Confirmation and Invoice Numbers

1. Select **PARTIAL CANCEL**.
2. Swipe the card.
3. Enter the partial transaction amount and press **OK**.
4. Enter the Confirmation Number found on the original receipt and press **OK**.
5. Enter the Invoice Number of the transaction found on the original receipt and press **OK**.
6. A receipt is printed.

## Cancelling an entire transaction

**Completely cancel a previous gift or loyalty card transaction.**

NOTE: You must have the original receipt with the Confirmation and Invoice Numbers

1. Select **COMPLETE CANCEL**.
2. Swipe the card.
3. Enter the transaction amount and press **OK**.
4. Enter the Confirmation Number found on the original receipt and press **OK**.
5. Enter the Invoice Number of the transaction found on the original receipt and press **OK**.
6. A receipt is printed.

## Daily Reports

**These reports are organized by employee. They allow employees to balance their cash at the end of their workday.**

1. Access the DataCandy menu (see steps above).
2. If prompted to swipe card, press the red button.
3. Select **DAILY REPORTS**.
4. Select the desired report:
   - **Employee Summary**: includes a total amount for each transaction type.
   - **Employee Details**: includes all the transactions for the employee logged into the terminal, including any made on other terminals.
   - **Merchant Summary**: includes the transactions for all employees on all terminals.
5. Select the desired time period OR enter a date.
6. The report is printed.

*All reports are based on a 24-hour day running from 00:00:00 to 23:59:59.