



# Givex<sup>®</sup> WebPOS

## User Guide

**Disclaimer:**

*It is the Merchant's sole responsibility to ensure that its stored value or loyalty program is in compliance with the laws, rules and regulations that apply in the Merchant's jurisdiction. Givex is in no way responsible should a Merchant program not be in compliance with such applicable laws. Should a Merchant require functionality for the program to be in compliance, Givex will provide the needed functionality upon request.*



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## 1 Givex WebPOS – Getting Started

The WebPOS is a secure gift card transaction website used by stores to:

- Perform Transactions (i.e. Activations, Redemptions, Balance, etc.)
- Access store reports at [portal.givex.com](http://portal.givex.com)

### 1.1 WebPOS site

To access the WEBPOS web site, open a new web browser and type the following into the address field: <http://webpos.givex.com> (do not type in “www”).

### 1.2 Logging In

When prompted, enter your Terminal User ID and Password as provided by Givex.

Operator IDs are set up on your administrative website. Please refer to your Givex Administrative Website User Guide to find out how to set up operator IDs and passwords.



### **1.3 Operator Logout**

Once an Operator completes a transaction, they can log out by selecting the Operator Logout button at the top of the page. If they do not log out, they can run consecutive transactions without having to log in each time.

### **1.4 Change Password**

It is important to note that IDs and Passwords should be kept confidential at all times, and operator passwords should be changed periodically in order to prevent misuse.

To change a password, enter the Operator ID and current password. Create a new password that is a minimum of 8 numeric digits. To confirm the password, re-enter it into the second password field.

### **1.5 Understanding IDs and Passwords**

For added security and tracking, Givex has two levels of IDs and Passwords on the WebPOS: Terminal IDs and Operator IDs.

#### **Terminal IDs**

A terminal ID and password is required when logging in to the WEBPOS. During a transaction, the terminal ID is communicated to the Givex host, identifying the PCs location. This ID will be provided directly from Givex.

#### **Operator IDs**

These are used to track individual operators or cashiers, and are required when performing transaction on the WEBPOS

**Note: Givex will create a default Operator ID called "0". This is a mandatory ID that is required and cannot be modified in any way.**

### **1.6 Help**

This page contains definitions on each of the online transaction types.

### **1.7 Support Page**

This page contains support information about your merchant's program.



## 2 WebPOS Transactions

### 2.1 Activate

This transaction lets you activate a Givex card for a specified amount.

When a dollar value is printed on a card, the card should be activated for the listed dollar value. When a dollar value is not printed on a card, then the card should be activated for the amount requested by the customer.

1. Enter quantity of Card(s) to activate and click **Go**
2. Select your Operator ID and enter your password
3. Enter the Card Number(s) and amount to Activate. If you are activating more than one card, enter each card on a different line.
4. Click **Submit**
5. On the confirmation screen press the Print Receipt button to print a receipt for the customer

**To avoid duplicate transactions fill out the form completely by using the tab key or mouse to move from field to field, and then click the Submit button.**

Givex Cards

Select Transaction
[Operator Logout](#) | [Change Password](#) | [Help](#) | [Support](#) | [Reports](#)

Activate  Card(s)   
max 25

Redeem  Card(s)   
max 25

Balance Check    
max 25

Increment

Merchandise Credit

Cancel

Register

Balance Transfer

Points issuance

Points redemption

**Activate**

1. Select Operator ID and Password:

Operator ID:  Password:

Remember Operator ID and Password

2. Enter currency amount(s) and Card Number(s) to Activate:

Amount:  Card Number(s):

Security Codet(s):

Total:



## 2.2 Redeem

This Transaction lets you deduct dollars from the Givex card online. This occurs when the dollars on the card are being applied towards the purchase of a product or service.

1. To redeem a Card, click on **Go**
2. Select your Operator ID and enter your password
3. Enter the Card Number and amount to Redeem
4. Click **Submit**
5. On the confirmation screen press the Print Receipt button to print a receipt for the customer

## 2.3 Balance Check

This Transaction lets you check the remaining balance of a Givex card online.

1. To check the balance on a Card, click **Go**
2. Select the Givex Number (full card number) or Certificate Number (partial card number) option
3. Enter the Card Number
4. Click **Submit**

## 2.4 Balance Transfer

This transaction lets you transfer both the monetary and points balance from one card to another

1. To transfer a Card balance, click on **Go**
2. Select your Operator ID and enter your password
3. Enter the 'From' Card Number and the 'To' Card Number
4. Click **Submit**
5. On the confirmation screen press the Print Receipt button to print a receipt for the customer

## 2.5 Cash Back

This transaction lets you convert the full or a partial balance to cash

1. To cash back a Card, click on **Go**
2. Select your Operator ID and enter your password
3. Enter the Card Number and amount to be issued as cash
4. Click **Submit**
5. On the confirmation screen press the Print Receipt button to print a receipt for the customer



## 2.6 Increment

This Transaction lets you add dollars to an already active Givex card online.

1. To Increment a Card, Click **Go**
2. Select your Operator ID and enter your Password
3. Enter the Card Number and amount to Incremented
4. Click **Submit**
5. On the confirmation screen press the Print Receipt button to print a receipt for the customer

## 2.7 Merchandise Credit

This Transaction lets you add dollars to a Givex card online. It operates similarly to the Increment transaction but is used for merchandise store credit or 'comp' scenarios

1. To Increment a Card, Click Go
2. Select your Operator ID and enter your Password
3. Enter the Card Number and amount to be credited to the card
4. Click **Submit**
5. On the confirmation screen press the Print Receipt button to print a receipt for the customer

## 2.8 Cancel

This transaction lets you cancel any previous transaction online as long as it is within the last 24-hours.

1. To cancel a transaction, Click **Go**
2. Select your Operator ID and enter your Password
3. Enter the Card Number and the Amount to be cancelled
4. Click **Submit**
5. On the confirmation screen press the Print Receipt button to print a receipt for the customer

**Note: You can only cancel the last transaction performed on the card and within 24 hours of the original transaction.**

## 2.9 Register

This transaction lets you register a Givex gift certificate. It creates and activates a Givex number. This feature may be password protected.

1. To register a gift certificate, click on **Go**
2. Select your Operator ID and enter your password
3. Select the amount to be registered





4. Click **Submit**
5. On the confirmation screen press the Print Receipt button to print a receipt for the customer This receipt will contain the full Givex number and can be used as a gift certificate

### **2.10 Points Issuance**

This transaction lets you add points to an already active Givex card when the customer purchases a good or service. This is an optional feature that is available for loyalty transactions and is not included in all programs.

1. To issue points, click on **Go**
2. Select your Operator ID and enter your password
3. Enter the dollar amount of the sale
4. You may be prompted to enter a Promo Code (this is an optional feature)
5. You may be prompted to enter the number of Units sold (this is an optional feature)
6. Enter the card number
7. Click **Submit**
8. On the confirmation screen press the Print Receipt button to print a receipt for the customer

### **2.11 Points Cancel**

This transaction lets you cancel a points issuance transaction. This is an optional feature that is available for loyalty transactions and is not included in all programs.

1. To cancel points, click on **Go**
2. Select your Operator ID and enter your password
3. Enter the Card Number and the dollar amount of sale and/or number of units sold (units sold is an optional feature)
4. Click **Submit**
5. On the confirmation screen press the Print Receipt button to print a receipt for the customer.

### **2.12 Points Redeem**

This transaction lets you redeem points in exchange for goods or services. This is an optional feature that is available for loyalty transactions and is not included in all programs.

1. To redeem points, click on **Go**
2. Select your Operator ID and enter your password
3. Enter the Card Number and amount of points to redeem
4. Click **Submit**
5. On the confirmation screen press the Print Receipt button to print a receipt for the customer





### 2.13 Transaction Reports

This transaction lets you generate a report displaying transaction totals for the virtual terminal and operators.

1. To generate Transaction Reports, click on **Go**
2. Select your Operator ID and enter your password
3. Select either All or a specific Operator to report on.
4. Select either Terminal or Operator Report type.
5. Click **Submit**
6. The report will be displayed on the following screen. Click **Print Report** at the bottom of the page to print.

### 2.14 Cash out

This transaction lets you close off all transactions for the day, similar to performing a cash out on a physical terminal or till.

1. To cash out the virtual terminal, click on **Go**
2. Click the **Submit** button to close all open transactions.
3. The cash out report will be displayed on the following screen. Click **Print Report** at the bottom of the page to print.

## 3 Additional Equipment

### 3.1 Bar Code and Magnetic Stripe Scanners

If you are using a magnetic stripe scanner or bar code reader to swipe gift cards, the reader MAY be programmed to input a carriage return (ENTER) at the end of the card number. When a card number is entered into the card number field on the screen, it will automatically process the order. You will NOT need to hit the submit button otherwise the transaction may go through twice.

To find out whether your card reader enters the carriage return, run a gift card transaction. If after 5 seconds of swiping the card you remain on the same page, then there is no carriage return and you will have to select the Submit button to process the transaction. If you want to remove the carriage return, please refer to the manual accompanying the scanner or contact the manufacturer of the card scanner directly.



### 3.2 Receipt Printers

The receipt from the WebPOS was designed to print on an 8 ½ X 11 paper. To print to a receipt printer, make sure that you are using a generic text driver.

If your receipt is printing blank spaces at the end of the transaction information, remove the html header and footer under Page Setup. On the Internet Explorer browser select File/Page Set-up and remove the text in the header & footer fields. Then run a transaction and print the receipt. The size of the receipt should be reduced.

## 4 Glossary

**Givex Number:** This is the primary reference number for Givex cards and it appears as the full number on the back of all Givex cards. This number is also encoded in a magnetic strip and printed as a bar code.

**Certificate Number:** This is a 4-10 digit number embedded within the full Givex Number. It is printed on receipts. This will be the number that will be viewed when generating reports.

**Authorization Number (Transaction ID):** The Authorization number is a 7-9 digit number that is provided to the operator after every transaction (i.e. Activation, Redemption, etc.).

For a full glossary of terms and definitions, please see the Glossary section of the Client Support Site on the Givex Portal [here](#) (must be logged into Portal).

## 5 Contact Givex

For more information about the Givex Administrative Portal Website or other Givex products and services, please feel free to contact us. Contact information can be found under the Help section in Portal or on [www.givex.com](http://www.givex.com).

### HELP

EMAIL SUPPORT

TELEPHONE SUPPORT

WEB SUPPORT