



TRIMIT B2C GIFT CARDS

This Document contains information about TRIMIT B2C Shop Gift Cards and Promotions functionality

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INTRODUCTION

The TRIMIT B2C Shop has the possibility to sell and utilize **Gift Cards**.

Gift Cards can be bought in the B2C Shop as Items and the consumer will get a unique **Gift Card Number** (Passcode).

This Gift Card Number (Passcode) can be used in another Order on the B2C Shop where the Gift Card Number has to be entered, to reduce the total basket's amount for a certain amount taken from the Gift Card.

Besides Gift Cards, the TRIMIT B2C Shop also has the possibility to make use of so called **Promotion Discounts** which is also added in this document.

The functionality described is the functionality in **TRIMIT 2016 W1** and **TRIMIT Portals 2016**.

The pictures in this White Paper are based on the demo database for **TRIMIT 2016 W1** in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. from Microsoft Dynamics NAV 2016).

COMPONENTS

Table	<i>6038148 B2C Promotion</i> <i>6038173 Gift Card</i> <i>6038176 Gift Card Batch</i> <i>6038177 B2C Promotion Log</i>
Codeunit	<i>6038173 Gift Card Handling</i>
Page	<i>6038144 B2C Promotions</i> <i>6038173 Gift Cards</i> <i>6038174 Gift Card Batches</i> <i>6038177 Gift Card Batch List</i>

Also in other objects changes have been implemented because of the TRIMIT B2C Shop Gift Cards and Promotion Discounts:

Codeunit	<i>6036570 Provision Handling Sales</i> <i>6038000 TRIMIT Service Sales Create</i>
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SETUP FOR GIFT CARDS

SALES & RECEIVABLES SETUP

Via **Departments/Sales & Marketing/Administration/Sales & Receivables Setup:**

Sales & Receivables Setup			
General			
Dimensions			
Numbering			
Customer Nos.:	CUST	Issued Reminder Nos.:	S-REM+
Quote Nos.:	S-QUO	Fin. Chrg. Memo Nos.:	S-FIN
Blanket Order Nos.:	S-BLK	Issued Fin. Chrg. M. Nos.:	S-FIN+
Order Nos.:	S-ORD-1	Posted Prepm. Inv. Nos.:	S-INV+
Return Order Nos.:	S-RETORD	Posted Prepm. Cr. Memo Nos.:	S-CR+
Invoice Nos.:	S-INV	Direct Debit Mandate Nos.:	DDM
Posted Invoice Nos.:	S-INV+	+TRIMIT	
Credit Memo Nos.:	S-CR	Summary Order Nos.:	S-SUMORD
Posted Credit Memo Nos.:	S-CR+	Campaign Discount Nos.:	CAMPDISC
Posted Shipment Nos.:	S-SHPT	Complaint Order Nos.:	COMPLAINT
Posted Return Receipt Nos.:	S-RCPT	Item Replacement Nos.:	REPLACE
Reminder Nos.:	S-REM	Consignment Journal Nos.:	CONS
		Gift Card Batch Nos.:	GCBATCH

FIELD GIFT CARD BATCH NOS.

Here you can enter the No. Series for the Gift Card Batch Numbers that can be used to create Gift Cards Numbers that can be used on the B2C Shop to pay with.

+ Info and Prices	
Availability Check	
Standard Inventory Profile Setup:	
Availability Date Format:	Week
Time of Availability Check:	None
Skip Reservation when Overbooked:	☐
Availability Check by Location:	☐
Instant Reservation Underlying Level:	☐
Discounts	
Extended Discount Search:	No
Line Discount Combination:	☐
Show Line Discounts of 0 %:	☐
Approve Change of Line Discount %:	Ask if existing Line Discount % is larger than...
DateManagement	
Sales Header Date -> Sales Line Date:	No
Commission	
Extended Commission Search:	Total
Approve Change of Commission:	Ask if existing Commission is larger than 0 (Defa...
Prices	
Use Base Unit Price:	Yes without Warning
Approve Change of Unit Price:	Ask if Existing Unit Price is Larger than 0 (Default...
Price Group Retail Unit Price:	RETAIL

FIELD PRICE GROUP RETAIL UNIT PRICE

Here you can enter a **Customer Price Group** that will be used to determine the Sales Price for the Gift Cards in the B2C Shop.

MASTER

Via **Departments/Warehouse/Product Design (PDM)/Masters**

You need to create a **Master** for the **Gift Cards** so it can be bought on the B2C Shop and can be taken into the **Categories** that will be shown in the B2C Shop.

FIELD COSTING METHOD

For this Master, the **Costing Method** (on FastTab **Invoicing**) needs to be **NINO** (never-in-never-out). Therefore, it will have no effect on MRP or Availability, and it will not be posted to the regular Inventory G/L Accounts, and there will not be any stock issues.

SALES PRICES

If the different values of your Gift Cards will be different Items, you might need to enter the Sales Prices on the individual Items.

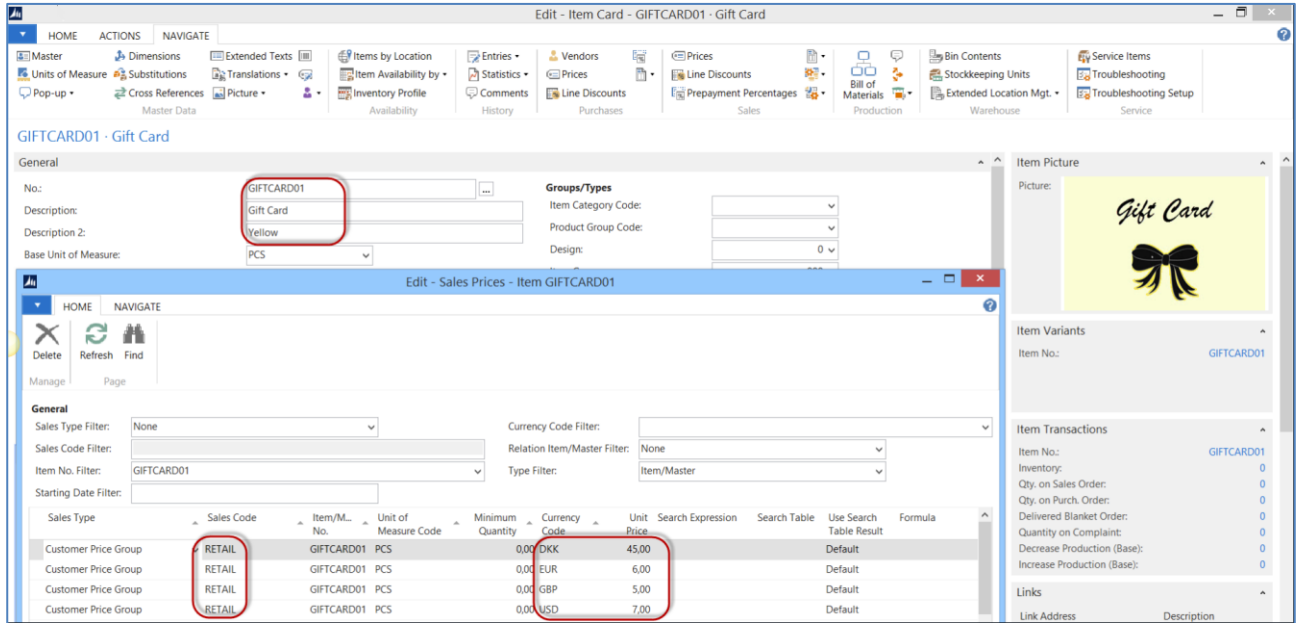
Keep in mind to enter at least the Sales Prices for the **Customer Price Group** that is set in the **Sales & Receivables Setup** as the **Price Group Retail Unit Price (RETAIL)**. Because that will be the Sales Price shown in the B2C Shop.

EXAMPLE:

You could setup a Master with a sequential Number (don't forget to fill the **Sequence No. Counter** on the FastTab **VarDim**) and create individual Items for the different values of the Gift Cards.

GIFTCARD · Gift Card			
General			
No.:	GIFTCARD	Collection Relation:	No
No. System:	MMMMMMMMLL	Private Label:	No
Description:	Gift Card	Blocked:	☐
Description 2:		Groups/Types	
Base Unit of Measure Code:	PCS	Item Type:	Finished Goods
Automatic Extended Texts:	☐	Item Category Code:	
Status Code:		Product Group Code:	
Search Description:	GIFT CARD	Design:	0
Group Master:		Item Group:	999
Collection No.:		Gender:	0
Delivery Period:		Item Statistics Group 4:	0
		Item Statistics Group 5:	0
Invoicing			
Costing Method:	NINO	Sales Unit of Measure:	PCS
Posting Groups		Global Dimensions	
General Product Posting Group:	GIFTCARDS	Brand Code:	
VAT Business Posting Group (Price):		Season Code:	
VAT Product Posting Group:	NO VAT	Job No.:	
Inventory Posting Group:	FINISHED	Commission / Bonus	
Allow Invoice Discount:	☒	Item Commission Group:	
Item Discount Group:		Item Bonus Group:	

On individual created Items that you can create based on this Master via **Departments/Warehouse/Product Design (PDM)/Items**, you can connect the specific Picture for the Gift Card that you also want to see on the B2C Shop and the Sales Price for this Gift Card.

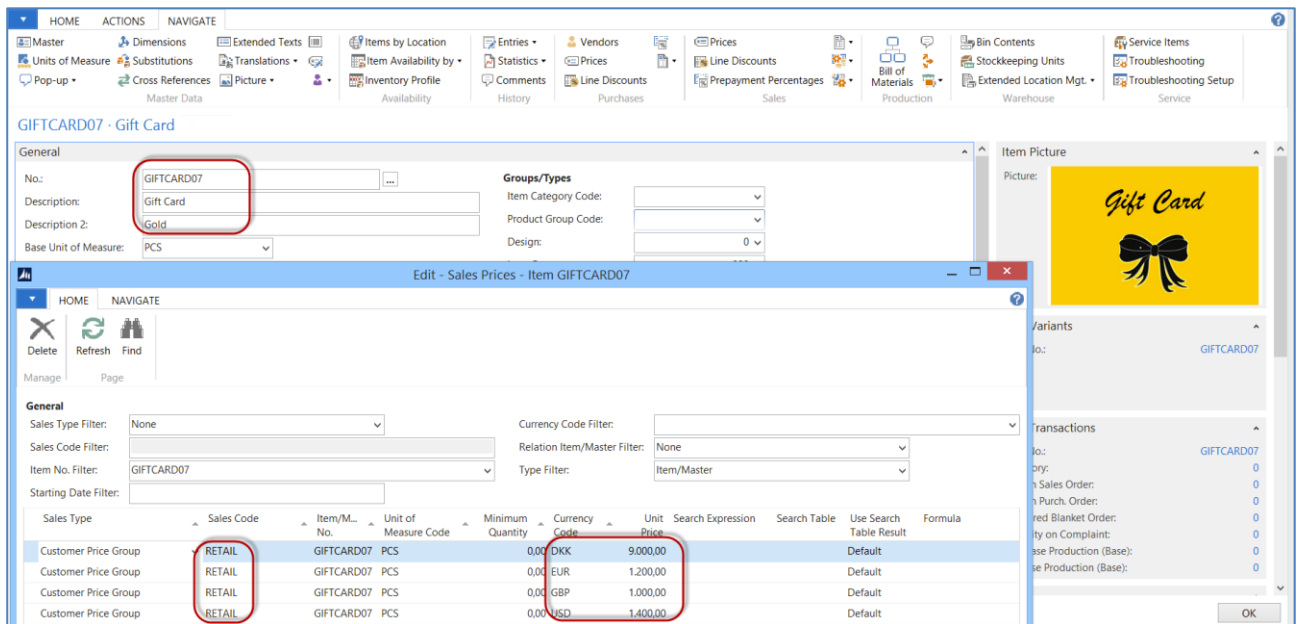


The screenshot shows the 'Edit - Item Card - GIFTCARD01 - Gift Card' window. The 'General' tab is active, showing the item number 'GIFTCARD01', description 'Gift Card', and base unit of measure 'PCS'. The 'Sales Prices' window is open, showing a table with the following data:

Sales Type	Sales Code	Item/M.L. No.	Unit of Measure Code	Minimum Quantity	Currency Code	Unit Price	Search Expression	Search Table	Use Search Table Result	Formula
Customer Price Group	RETAIL	GIFTCARD01	PCS	0.00	DKK	45.00		Default		
Customer Price Group	RETAIL	GIFTCARD01	PCS	0.00	EUR	6.00		Default		
Customer Price Group	RETAIL	GIFTCARD01	PCS	0.00	GBP	5.00		Default		
Customer Price Group	RETAIL	GIFTCARD01	PCS	0.00	USD	7.00		Default		

Item *GIFTCARD01* is a Yellow Gift Card for 5,00 GBP.

But if customers could buy it in other currencies on the B2C Shop you might need to add Sales Prices to the Item for the different currencies.



The screenshot shows the 'Edit - Item Card - GIFTCARD07 - Gift Card' window. The 'General' tab is active, showing the item number 'GIFTCARD07', description 'Gift Card', and base unit of measure 'PCS'. The 'Sales Prices' window is open, showing a table with the following data:

Sales Type	Sales Code	Item/M.L. No.	Unit of Measure Code	Minimum Quantity	Currency Code	Unit Price	Search Expression	Search Table	Use Search Table Result	Formula
Customer Price Group	RETAIL	GIFTCARD07	PCS	0.00	DKK	9,000.00		Default		
Customer Price Group	RETAIL	GIFTCARD07	PCS	0.00	EUR	1,200.00		Default		
Customer Price Group	RETAIL	GIFTCARD07	PCS	0.00	GBP	1,000.00		Default		
Customer Price Group	RETAIL	GIFTCARD07	PCS	0.00	USD	1,400.00		Default		

Item *GIFTCARD07* is a Gift Card for 1000,00 GBP, but will have prices in several currencies for the **Customer Price Group RETAIL**.

You can also setup the Master/Items completely different:

Master with a Size (Price) Table where the variants are the values of the Gift Cards, and where the specific Gift Card pictures are related to these Sizes (Prices).

It depends on which Gift Cards you can have and if you have them in different currencies.

PROVISION SALES

Specifically if you sell Gift Cards to consumers, you are able to post a Provision for it in your General Ledger via the **Provision Sales** if you have the **Calculation Base Provision** set to *Gift Card*.

Therefore, you can setup the **Provision Sales** via **Departments/Financial Management/Administration/Provisions Sales**.

Provision Sales							Type to filter (F3)	Name		
No filters applied										
Name	General Business Posting Group	General Product Posting Group	Description	Calculation Base Provision	G/L Account Debit	G/L Account Credit	Reason Code			
GIFT CARD	EU	GIFTCARDS	Gift Cards EU/GIFTCARDS	Gift Card	6900	5465	GIFT CARD			
GIFT CARD	EXPORT	GIFTCARDS	Gift Cards EXPORT/GIFTCARDS	Gift Card	6900	5465	GIFT CARD			
GIFT CARD	NATIONAL	GIFTCARDS	Gift Cards NATIONAL/GIFTCARDS	Gift Card	6900	5465	GIFT CARD			

The Provision for the Gift Cards then gives you an overview of which value for Gift Cards has been sold/created already and which value you might expect in the future to be deducted from your Sales Revenue.

CATEGORIES

You need to connect the Items for the Gift Cards that you created to a **Category** via **Departments/TRIMIT Portals/Categories/Categories**.

EXAMPLE:

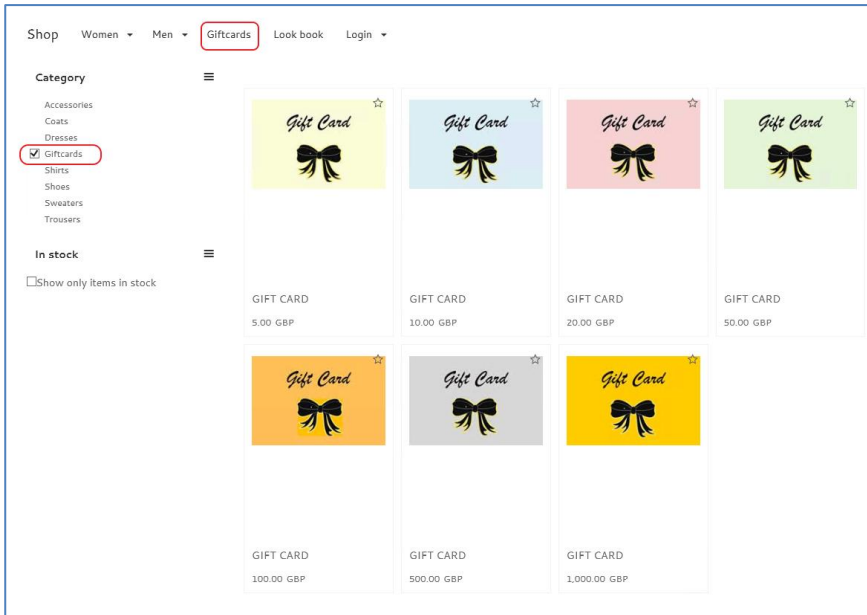
Edit - Category Lines - GIFTCARDS												
Type to filter (F3) Type												
Filter: Category GIFTCARDS												
Type	No.	Expand on level	Matrix Limitation	Description	Filter Collection Shipment Date Code	Category Lines	Gift Card	Customer Club Level	Alternative Sorting	Effective Date	Expiry Date	Handle Item as
Item	GIFTCARD01			Giftcard Yellow	No		☒	Level 0	0			Item
Item	GIFTCARD02			Giftcard Blue	No		☒	Level 0	0			Item
Item	GIFTCARD03			Giftcard Red	No		☒	Level 0	0			Item
Item	GIFTCARD04			Giftcard Green	No		☒	Level 0	0			Item
Item	GIFTCARD05			Giftcard Bronze	No		☒	Level 0	0			Item
Item	GIFTCARD06			Giftcard Silver	No		☒	Level 0	0			Item
Item	GIFTCARD07			Giftcard Gold	No		☒	Level 0	0			Item

In this example we created a specific category *GIFTCARDS* with all the Items for the Gift Cards in different colors (values) and added it as a Category Line to the Category *B2C* (the top-level in the category structure for the B2C Shop).

FIELD GIFT CARD

The field **Gift Card** must be checked for the Category Lines that are Gift Cards.

This might result on the B2C Shop as:

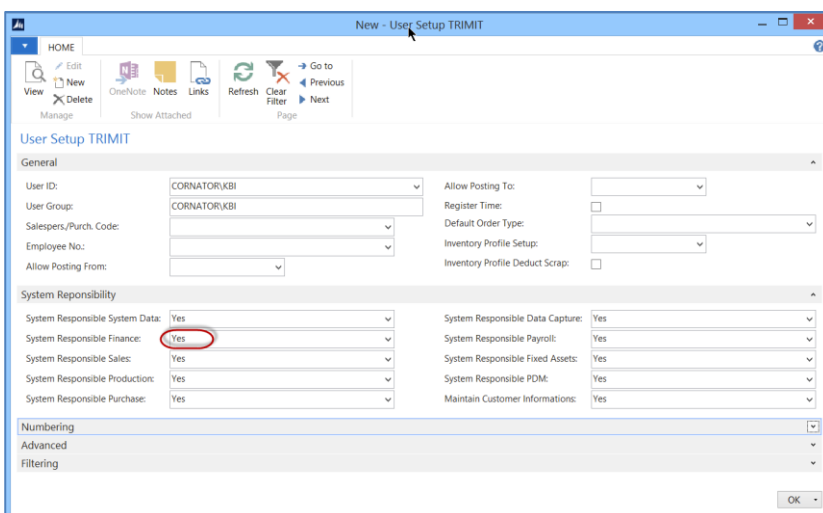


GIFT CARD BATCH

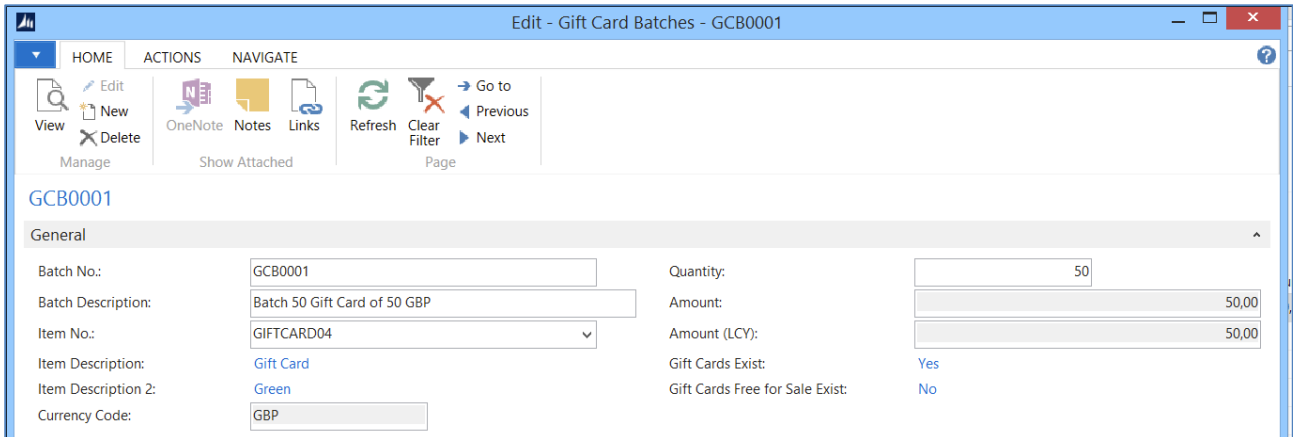
It is possible to create a batch of Gift Card Numbers up front, via **Departments/TRIMIT Portals/Gift Card/Gift Card Batch List**, which you might sell up front to a customer – a shop - or simply give away. In that case, a consumer can buy or get such a Gift Card Number in the shop, which he can use on the B2C Shop to reduce the amount he has to pay.

USER SETUP - SYSTEM RESPONSIBLE FINANCE

To be able to create Gift Card Numbers based on a Gift Card Batch, the user needs to have a checkmark in **System Responsible Finance** in the User Setup Card via **Departments/Administration/Application Setup/Users/User Setup**



FASTTAB GENERAL



BATCH NO.

The unique Number for this Batch.

With <Enter> a new number can be created based on the **No. Series** that was entered in the **Sales & Receivables Setup**.

In addition, you could enter a **Batch No.** manually for this Gift Card Batch – if the **No. Series** will allow it.

BATCH DESCRIPTION

You can enter a **Description** for this Batch.

ITEM NO.

In this Field, you need to enter an **Item No.** that represents the Gift Card Numbers that you want to create by using this Batch.

ITEM DESCRIPTION AND ITEM DESCRIPTION 2

Will be shown based on the entry of the **Item No.**

CURRENCY CODE

In this Field, you need to enter the **Currency Code** for the value of the Gift Card Numbers you want to create by using this Batch.

NOTE

If you already created Gift Cards for a specific **Item No.** you can't change the **Currency Code** or the **Amount** and **Amount (LCY)** anymore – even if that was in another batch.

QUANTITY

In this Field, you need to enter the quantity of Gift Card Numbers that you want to create by using this Batch.

AMOUNT

In this Field, you need to enter the **Amount** for the Gift Card Numbers in the currency you entered in **Currency Code**.

AMOUNT (LCY)

The value of **Amount (LCY)** will be calculated based on the **Amount** and the current Exchange Rate of the **Currency Code** you entered earlier.

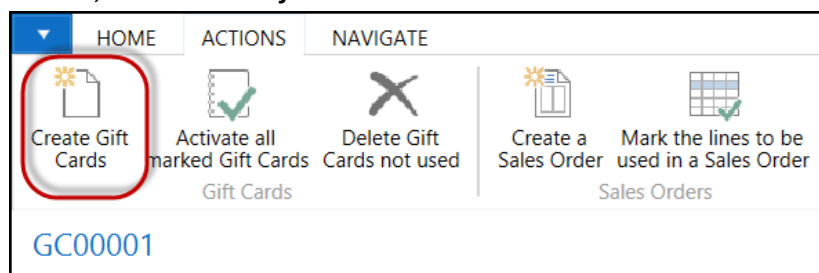
GIFT CARDS EXIST

Flow field to show you if already Gift Card Numbers have been created

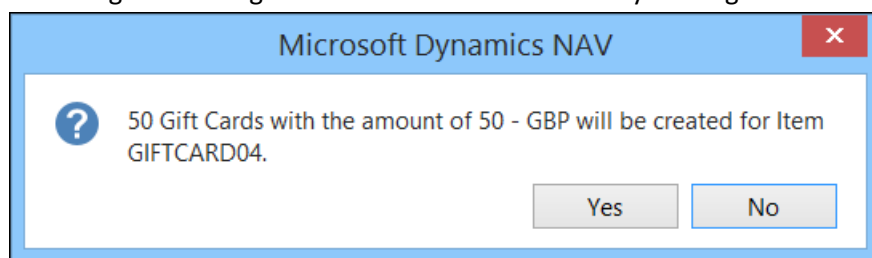
GIFT CARDS FREE FOR SALE EXIST

Flow field to show you if there are created Gift Card Numbers of this Batch that have not been sold already to a Customer.

After the fields of FastTab **General** have been entered, you can create the Gift Card Numbers via ribbon **Actions**, click **Create Gift Cards**.



You will get a message that needs to be confirmed by clicking **Yes**:



Now the system has created the **Quantity** Gift Card Numbers, which can be viewed via ribbon **Navigate**, click **Gift Cards**:

Edit - Gift Cards

HOME ACTIONS NAVIGATE

View List Edit List Set/Remove Mark All Lines Gift Card Batch Navigate Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Gift Cards - Type to filter (F3) Mark Line Filter: GCB0001

Mark Line	Type	Document Type	Document No.	Document Line No.	Created from	Batch No.	Currency Code by Creation	Item No.	Item Description	Passcode	Amount	Amount (LCY)	Provision Posted	Activated	Posted Date	Posted Document No.
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	5D7ED7EF	50,00	50,00	☐	☒		
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	6A969648	50,00	50,00	☐	☒		
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	75C57429	50,00	50,00	☐	☒		
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	CD88C73F	50,00	50,00	☐	☒		
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	FFF850B3	50,00	50,00	☐	☒		
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	DA9A63D1	50,00	50,00	☐	☒		
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	9D44D645	50,00	50,00	☐	☒		
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	24B7731F	50,00	50,00	☐	☒		
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	9B6AB8EE	50,00	50,00	☐	☒		
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	AFC59BC0	50,00	50,00	☐	☒		

OK

The **Passcode** have been automatically created, and is the code that can be used on the B2C Shop to pay with.

In the Demo Company there are 50 Gift Cards / Passcodes created and activated, that can be used on the Demo B2C Shop.

These 50 Passcodes are:

5D7ED7EF	6A969648	75C57429	CD88C73F	FFFB50B3
DA9A63D1	9D44D645	24B7731F	9B6AB8EE	AFC59BC0
9D663A4D	4F4F095D	5306CF02	66BDC0AA	21E270A3
23DC70A3	2278E41F	92FE6D20	D02C5569	D9FF709E
193E1A17	5EA88EE6	FE853638	3C4666A1	BACEBE39
6CACA72D	40679AE5	CE676109	65B0C45E	A5E304B1
DE50253B	99FBD651	7266F451	0D9DAD77	E7CB7D0E
7D4C7F8E	DE00B43A	AB83D2EE	FF146B7C	C73B05C9
6104B97C	20AAD484	848760C6	291A1F7C	22D57475
7DC19A4F	077F97BE	EE03C80D	B8713B7F	64A1FFF4

FASTTAB CREATE A SALES ORDER

Create a Sales Order

Sell-to Customer No.: 2000

Free of Charge: ☐

Posting Date:

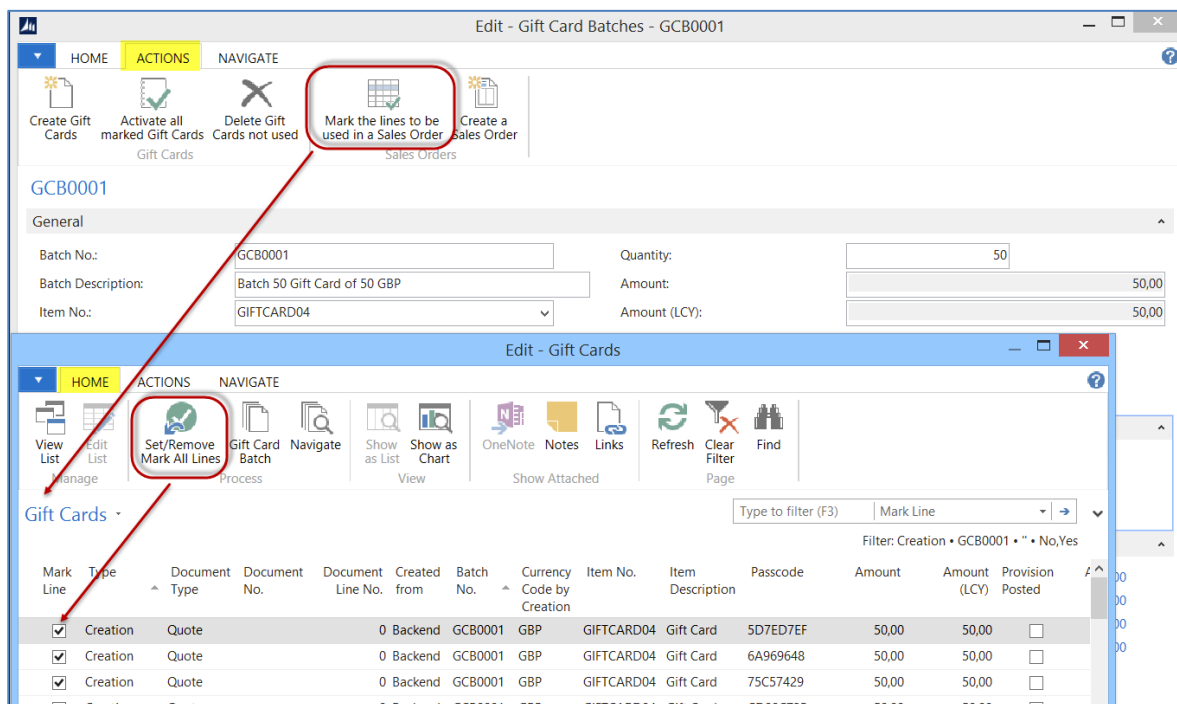
Activate and Post the Order: ☐

Marked Lines Exist: No

You can create a Sales Order for the Gift Card Numbers that you created by using the Gift Card Batch to sell them to a specific customer.

Therefore, you need to follow the following steps:

1. Enter a **Sell-to Customer No.**
2. Mark the first 10 Gift Card Numbers that you want to sell. Via ribbon **Actions**, click **Mark the Lines to be used in a Sales Order**. You can use ribbon **Home**, click **Set/Remove Mark all Lines** to set the marks for all the Gift Card Numbers or mark lines manually.



Edit - Gift Card Batches - GCB0001

Actions

Create Gift Cards | Activate all marked Gift Cards | Delete Gift Cards not used | **Mark the lines to be used in a Sales Order** | Create a Sales Order

GCB0001

General

Batch No.: GCB0001 | Quantity: 50
Batch Description: Batch 50 Gift Card of 50 GBP | Amount: 50,00
Item No.: GIFTCARD04 | Amount (LCY): 50,00

Edit - Gift Cards

Actions

View List | Edit List | **Set/Remove Mark All Lines** | Gift Card Batch | Navigate | Show as List | Show as Chart | OneNote | Notes | Links | Refresh | Clear Filter | Find

Gift Cards

Type to filter (F3) | Mark Line | Filter: Creation • GCB0001 • " • No, Yes

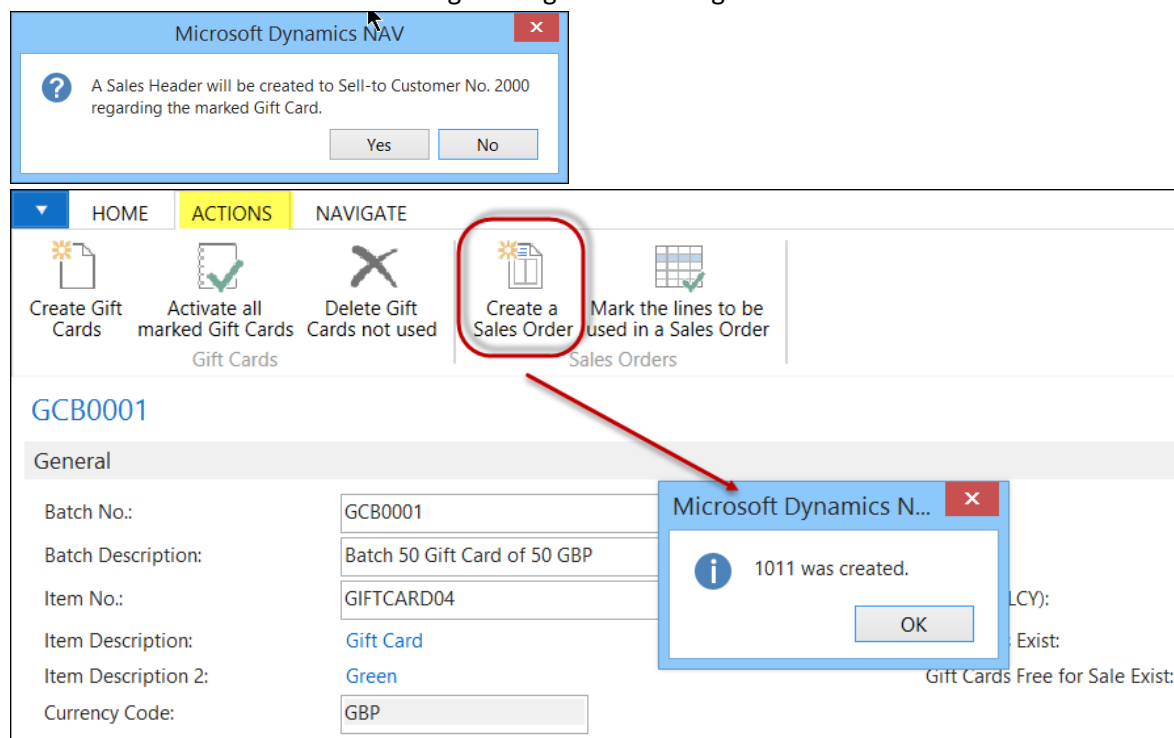
Mark Line	Type	Document Type	Document No.	Document Line No.	Created from	Batch No.	Currency Code by Creation	Item No.	Item Description	Passcode	Amount	Amount (LCY)	Provision Posted
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	5D7ED7EF	50,00	50,00	☐
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	6A969648	50,00	50,00	☐
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	75C57429	50,00	50,00	☐
☒	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	CD88C73F	50,00	50,00	☐

NOTE

The system will only show you the Gift Cards that have not been activated yet.
Therefore, you might have to change the Filter of the page of the Gift Cards to see the previous created and activated Gift Cards.

- Back in the Gift Card Batch Card, you can create a Sales Order via ribbon *Actions*, click **Create a Sales Order**:

You will have to confirm the following message with clicking Yes:



The screenshot shows the Microsoft Dynamics NAV interface. A message box at the top states: "A Sales Header will be created to Sell-to Customer No. 2000 regarding the marked Gift Card." with "Yes" and "No" buttons. Below, the ribbon has tabs for HOME, ACTIONS, and NAVIGATE. The ACTIONS tab is active, showing icons for "Create Gift Cards", "Activate all marked Gift Cards", "Delete Gift Cards not used", "Create a Sales Order" (highlighted with a red circle), and "Mark the lines to be used in a Sales Order". Below the ribbon, the "General" section shows fields for Batch No. (GCB0001), Batch Description (Batch 50 Gift Card of 50 GBP), Item No. (GIFTCARD04), Item Description (Gift Card), Item Description 2 (Green), and Currency Code (GBP). A second message box at the bottom right states: "1011 was created." with an "OK" button.

A message will appear to give you the **No.** of the created Sales Order.

The created Sales Order **1011** will look like:

1011 - The Fashion Store UK									
General									
Lines									
Line	VarDim	Related Order	Functions	Order	Find	Filter	Clear Filter		
Expand Matrix	Type	No.	Description	Description 2	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Amount Excl. VAT
☐	Item	GIFTCARD04	Gift Card	Green		1	PCS		
☐	Item	GIFTCARD04	Gift Card	Green		1	PCS		
☐	Item	GIFTCARD04	Gift Card	Green		1	PCS		
☐	Item	GIFTCARD04	Gift Card	Green		1	PCS		
☐	Item	GIFTCARD04	Gift Card	Green		1	PCS		
☐	Item	GIFTCARD04	Gift Card	Green		1	PCS		
☐	Item	GIFTCARD04	Gift Card	Green		1	PCS		
☐	Item	GIFTCARD04	Gift Card	Green		1	PCS		
☐	Item	GIFTCARD04	Gift Card	Green		1	PCS		
☐	Item	GIFTCARD04	Gift Card	Green		1	PCS		

NOTE

The specific 10 Passcodes of the 10 sold Gift Cards, should also be send to the Customer, or the company that created the Gift Cards, should be able to print/make Gift Cards with these Passcodes to send to the Customer.
This is however not foreseen in TRIMIT because this really depends on company layout.

NOTE

The **Currency** and **Amount** of the Gift Card Batch will only determine the Currency and Value of the Gift Card Nos. It will NOT determine the **Unit Price** for the Sales Order that you might create; this will always be determined via the normal price search rules.

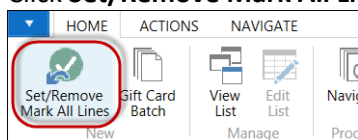
At this point, you created the Gift Card Nos. and sold them to a specific Customer. These Gift Cards Nos. can however not be used in the B2C Shop until they are activated.

Therefore, you need to take the following steps to activate the Gift Card Nos.:

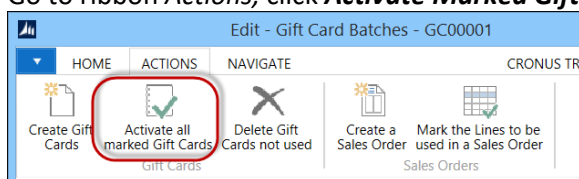
1. Go to ribbon *Navigate*, click **Gift Cards**



2. Click **Set/Remove Mark All Lines**



3. Go back to the Gift Card Batch
4. Go to ribbon *Actions*, click **Activate Marked Gift Cards**



5. If you now go to ribbon *Navigate*, click **Gift Cards** you can see that your 50 Gift Card Nos. are now activated.

View - Gift Cards																
HOME ACTIONS NAVIGATE																
Gift Cards																
Mark Line	Type	Document Type	Document No.	Document Line No.	Created from	Batch No.	Currency Code by Creation	Item No.	Item Description	Passcode	Amount	Amount (LCY)	Provision Posted	Activated	Posted Date	Posted Document No.
☐	Creation	Order	1011	10000	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	5D7ED7EF	50,00	50,00	☐	☒		
☐	Creation	Order	1011	20000	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	6A969648	50,00	50,00	☐	☒		
☐	Creation	Order	1011	30000	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	75C57429	50,00	50,00	☐	☒		
☐	Creation	Order	1011	40000	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	CD88C73F	50,00	50,00	☐	☒		
☐	Creation	Order	1011	50000	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	FFB5083	50,00	50,00	☐	☒		
☐	Creation	Order	1011	60000	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	DA9A63D1	50,00	50,00	☐	☒		
☐	Creation	Order	1011	70000	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	9D44D645	50,00	50,00	☐	☒		
☐	Creation	Order	1011	80000	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	24B7731F	50,00	50,00	☐	☒		
☐	Creation	Order	1011	90000	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	9B6A88EE	50,00	50,00	☐	☒		
☐	Creation	Order	1011	100000	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	AFC59BC0	50,00	50,00	☐	☒		
☐	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	9D663A4D	50,00	50,00	☐	☒		
☐	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	4F4F095D	50,00	50,00	☐	☒		
☐	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	5306CF02	50,00	50,00	☐	☒		
☐	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	66BDC0AA	50,00	50,00	☐	☒		
☐	Creation	Quote		0	Backend	GCB0001	GBP	GIFTCARD04	Gift Card	21E270A3	50,00	50,00	☐	☒		

6. Now the **Passcode** of the Gift Cards can be used on the B2C Shop.

FREE OF CHARGE

This field will make sure that if you create a Sales Order for the Gift Card Nos. the **Unit Price** will be zero – you give them away for free.

Create a Sales Order	
Sell-to Customer No.: 2000	Free of Charge: ☐
Posting Date: 22-1-2015	Activate and Post the Order: ☒
	Marked Lines Exist: No

POSTING DATE

Here you can enter the **Posting Date** for the Sales Invoice you want to create if you have a checkmark in **Activate and Post the Order**.

ACTIVATE AND POST THE ORDER

A checkmark in this field will automatically activate the Gift Card Nos. and post the Sales Order immediately when you **Create the Sales Order** via the ribbon *Actions*, click **Create the Sales Order**.

FASTTAB QTY. AND AMOUNTS

The Flow Fields on the FastTab **Qty. And Amounts** give you the totals of the Gift Card Nos. that are attached to this specific Gift Card Batch.:

Qty. And Amounts			
Number of Gift Cards:	50	Total Value Activated (LCY):	2.500,00
Number of Gift Cards Activated:	50	Outstanding Amount:	2.500,00
Number of Gift Cards for Sale:	0	Outstanding Amount (LCY):	2.500,00
Total Value:	2.500,00	Outstanding Amount Activated (LCY):	2.500,00
Total Value (LCY):	2.500,00		

NOTE

The **Number of Gift Cards for Sales** give you the total number of Gift Cards that are not activated and not sold yet to a customer.

If all Gift Cards are activated; this Number will therefore be 0 (Zero).

NOTE

Once you have created Gift Card Nos. by using a Gift Card Batch, and even might have sold some to a customer, you are still able to create another quantity of Gift Card Nos. within the same Batch.

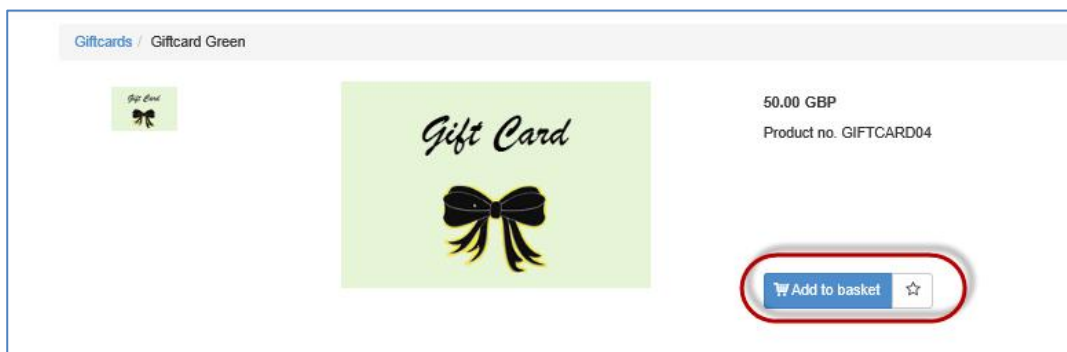
They will also get the same value based on the **Currency** and **Amount** of the Gift Card Batch.

Once you have used a specific **Item No.** in a Gift Card Batch with a specific **Currency** and **Amount**, in a new Gift Card Batch the same **Item No.** will always get the same **Currency** and **Amount** and this can't be changed.

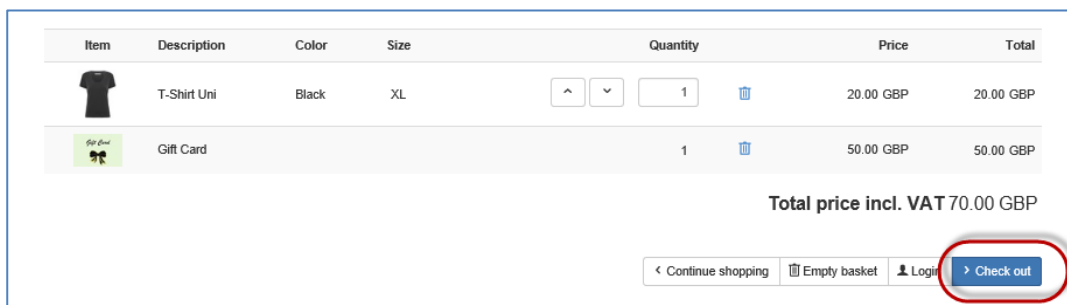
GIFT CARD PROCESS

CONSUMER BUYS GIFT CARD

A consumer can buy a Gift Card on the B2C Shop, by adding the right Item to his Basket:



And it will show up in the **Basket** as a 'normal' Item:



When the Gift Card is bought by a consumer on the B2C Shop – this consumer could receive a Gift Card Number in an Order Confirmation file (.pdf) which is sent to consumer's E-Mail address after the payment of the Order is accepted.

As an option a Gift Card Number could be printed from the consumer's list of Orders using special "fancy" layout.

TRIMIT B2C Shop does not have these options out-of-the-box, they need to be customized per company.

NOTE

When customer has only Gift Card in the basket then it is possible to skip the **delivery address** page when finalizing the order. This comes from the fact that the Gift Card can be sent by E-Mail. The E-Mail is specified by customer on **billing address** page for non-authorized users. Authorized users specify the E-Mail during the registration process. Theme value "*GiftCardSkipAddressDetails*" on B2C view in CPO admin controls whether to show **delivery address** page when having only Gift Card in basket (value *FALSE*) or not to show (value *TRUE*).

NOTE

Discounts cannot be added to order lines of type Gift Card.

In TRIMIT you are now able to see the sold Gift Cards via **Departments/TRIMIT Portals/Gift Card/Gift Cards:**

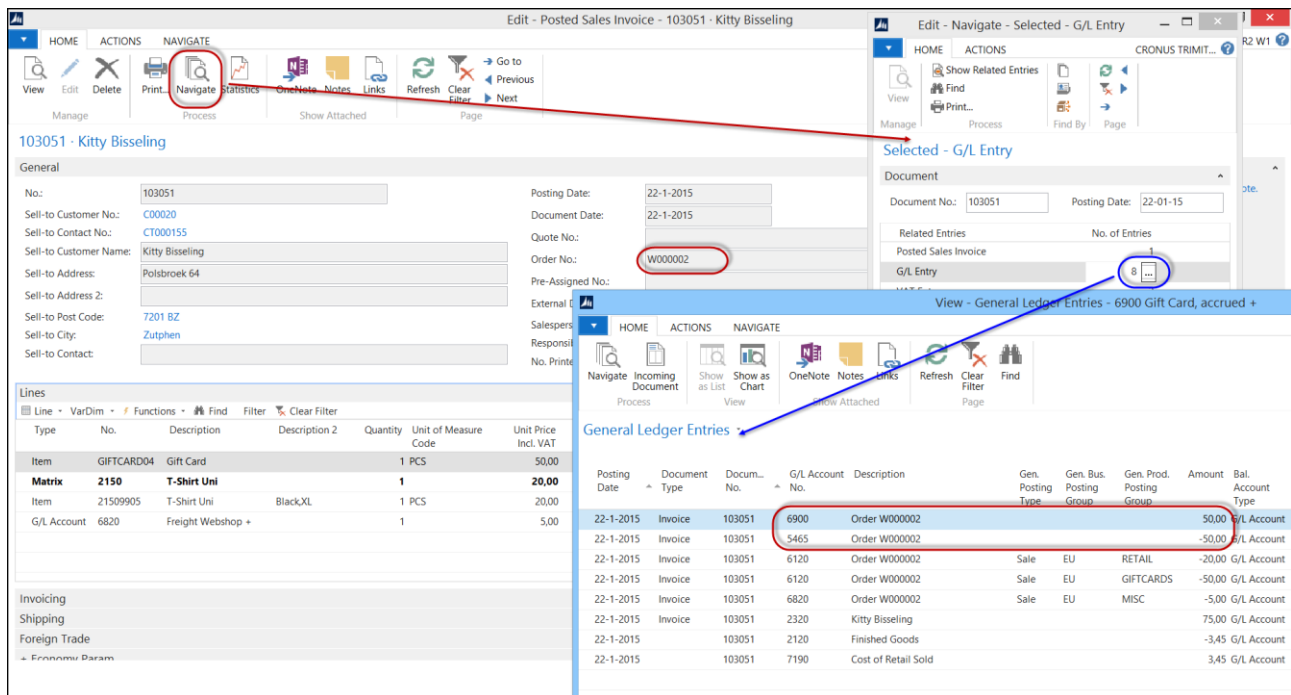
Gift Cards														
Mark Line	Type	Document Type	Document No.	Document Line No.	Created from	Batch No.	Currency Code by Creation	Item No.	Item Description	Passcode	Amount	Amount (LCY)	Provision Posted	Activated
☐	Creation	Order	W000001	10000	Frontend		GBP	GIFTCARD07	Gift Card	14BC2B10	1,000.00	1,000.00	☐	☒
☐	Creation	Order	W000002	10000	Frontend		GBP	GIFTCARD04	Gift Card	C2E24CCD	50.00	50.00	☐	☒

The **Type** will be *Creation* because you created this Gift Card.

The **Passcode** is the specific Gift Card Number that needs to be communicated with the consumer.

You can now deliver and invoice the Sales Order *W000002*, the same way as you might usually handle your orders.

In the **Posted Sales Invoice** you will also find the **Provision Sales G/L Entries**, as we have setup in [Provision Sales](#).



103051 - Kitty Bisseling

General

No.: 103051
 Sell-to Customer No.: C00020
 Sell-to Contact No.: CT000155
 Sell-to Customer Name: Kitty Bisseling
 Sell-to Address: Polsbroek 64
 Sell-to Address 2:
 Sell-to Post Code: 7201 BZ
 Sell-to City: Zutphen
 Sell-to Contact:

Posting Date: 22-1-2015
 Document Date: 22-1-2015
 Quote No.:
 Order No.: W000002
 Pre-Assigned No.:
 External Salesperson:
 Responsibility:

Lines

Type	No.	Description	Description 2	Quantity	Unit of Measure	Unit Price Incl. VAT
Item	GIFTCARD04	Gift Card		1	PCS	50.00
Matrix	2150	T-Shirt Uni		1		20.00
Item	21509905	T-Shirt Uni	BlackXL	1	PCS	20.00
G/L Account	6820	Freight Webshop +		1		5.00

Invoicing
Shipping
Foreign Trade

General Ledger Entries

Posting Date	Document Type	Document No.	G/L Account No.	Description	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount	Bal. Account Type
22-1-2015	Invoice	103051	6900	Order W000002				50.00	G/L Account
22-1-2015	Invoice	103051	5465	Order W000002				-50.00	G/L Account
22-1-2015	Invoice	103051	6120	Order W000002	Sale	EU	RETAIL	-20.00	G/L Account
22-1-2015	Invoice	103051	6120	Order W000002	Sale	EU	GIFTCARDS	-50.00	G/L Account
22-1-2015	Invoice	103051	6820	Order W000002	Sale	EU	MISC	-5.00	G/L Account
22-1-2015	Invoice	103051	2320	Kitty Bisseling				75.00	G/L Account
22-1-2015		103051	2120	Finished Goods				-3.45	G/L Account
22-1-2015		103051	7190	Cost of Retail Sold				3.45	G/L Account

After the Sales Invoice has been created and posted the fields in the Gift Card page will have changed as well:

Gift Cards														
Mark Line	Type	Document Type	Document No.	Document Line No.	Created from	Batch No.	Currency Code by Creation	Item No.	Item Description	Passcode	Amount	Amount (LCY)	Provision Posted	Activated
☐	Creation	Order	W000001	10000	Frontend		GBP	GIFTCARD07	Gift Card	14BC2B10	1,000.00	1,000.00	☐	☒
☐	Creation	Order	W000002	10000	Frontend		GBP	GIFTCARD04	Gift Card	C2E24CCD	50.00	50.00	☒	☒

Because **Provision** has been posted a checkmark will indicate that the Provision for the Gift Card has been posted, the **Posted Date** will show the **Posting Date** of the Posted Sales Invoice, and the **Posted Document No.** will show the number of the Posted Sales Invoice.

In the above example the **Posting Date** would be filled with *22-01-15* and the **Posted Document No.** with *103051*.

CONSUMER USES GIFT CARD

The specific **Passcode** can now be used in the B2C Shop in an Order on the **Confirm order** page in field **Vouchers & gift cards**:

Item	Description	Color	Size	Quantity	Price	Total
	Cardigan	Red	XXL	1	44.00 GBP	44.00 GBP

Vouchers & gift cards

5D7ED7EF Apply

Comment

write your comment Save Comment

Wrapping test another line Yes, I would like wrapping for 1.50 ☐

Delivery: GLS to Home Address 5.00 GBP

Total price incl. VAT 49.00 GBP

☐ I accept [terms and conditions](#)

< Delivery > Pay now simulation

After clicking **Apply** the Amount of the Gift Card will be deducted from the **Total price incl. VAT**. In this case, only 49,00 GBP.

A Gift Card's amount can be used fully or partly on a single Order. In case a Gift Card's amount has not been used fully - this card, with the remaining amount, can be used on other Orders until the amount is fully used.

The amount specified by the Gift Card is deducted from the orders total amount **Total price incl. VAT**

Item	Description	Color	Size	Quantity	Price	Total
	Cardigan	Red	XXL	1	44.00 GBP	44.00 GBP

Vouchers & gift cards

Enter your gift card or voucher code Apply  Gift card -49.00 GBP

Comment

write your comment Save Comment

Wrapping test another line Yes, I would like wrapping for 1.50 ☐

Delivery: GLS to Home Address 5.00 GBP

Total price incl. VAT 0.00 GBP

☐ I accept [terms and conditions](#)

< Delivery > Pay now simulation

In TRIMIT you are now able to see what happened with the Value of the Gift Cards via

Departments/TRIMIT Portals/Gift Card/Gift Cards:

Gift Cards																
Mark Line	Type	Document Type	Document No.	Document Line No.	Created from	Batch No.	Currency Code by Creation	Item No.	Item Description	Passcode	Amount	Amount (LCY)	Provision Posted	Activated	Posted Date	Posted Document No.
☐	Creation	Order	W000001	10000	Frontend		GBP	GIFTCARD07	Gift Card	148C2B10	1,000,00	1,000,00	☐	☒		
☐	Creation	Order	W000002	10000	Frontend		GBP	GIFTCARD04	Gift Card	C2E24CCD	50,00	50,00	☒	☒	22-1-2015	103051
☐	Decrease	Order	W000003	38276	Frontend		GBP	GIFTCARD04	Gift Card	C2E24CCD	-49,00	-49,00	☐	☒		

You got a line with **Type Decrease** for **-49,00 GBP**.

You can now deliver and invoice the Sales Order **W000003**, the same way as you might usually handle your orders.

W000003 · Kitty Bisseling

General

No.:

W000003

Sell-to Customer No.:

C00020

Sell-to Customer Name:

Kitty Bisseling

Sell-to City:

Zutphen

Posting Date:

1-5-2014

Order Date:

1-5-2014

Document Date:

1-5-2014

Requested Delivery Date:

External Document No.:

Salesperson Code:

Status:

Open

Use Value Date:

☐

Blocked:

☒

Ignore Blocking:

☒

Skip Availability Check:

☐

Order Type:

WEB

Collection No.:

Show more fields

Lines

Expand Matrix

Line

VarDim

Related Order

Functions

Order

Find

Filter

Clear Filter

Line	Type	No.	Description	Description 2	Related Order No.	Quantity	Unit of Measure Code	Unit Cost (LCY)	Unit Price Incl. VAT	Line Amount Incl. VAT	Shipment Date	Qty. to Ship
☒	Matrix	2250	Cardigan			1		0,00	44,00	44,00	1-5-2014	1
☐	Item	22507006	Cardigan	Red,XXL		1	PCS	10,347	44,00	44,00	1-5-2014	1
☐	G/L Account	6820	Freight Webshop +			1		0,00	5,00	5,00	1-5-2014	1
☐	Item	GIFTCARD04	Gift Card			1	PCS	0,00	-49,00	-49,00	1-5-2014	1

In this case, there might be the situation that the total amount of the Sales Order has been 'paid' by using a Gift Card, like in our example.

In that case, the field **Blocked** will be set to Yes, and you need to enter a checkmark in the field **Ignore Blocking** before the Order can be posted.

This can be prevented by using the parameter **Disable Order Blocking** in the B2C Profile Setup as described in the **White Paper – TRIMIT B2C NAV Setup**

Edit - Portal B2C setup - B2C

HOME

NAVIGATE

CRONUS TRIMIT 2015 W1 - TRIMIT2015...

View

Edit

New

Delete

OneNote

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Manage

Show Attached

Page

B2C

General

Customer Registration

Order Setup

Order Nos.:

S-ORD-W

Default Price Group:

RETAIL

Default Order Type:

WEB

Campaign Pricelist:

Default Currency:

GBP

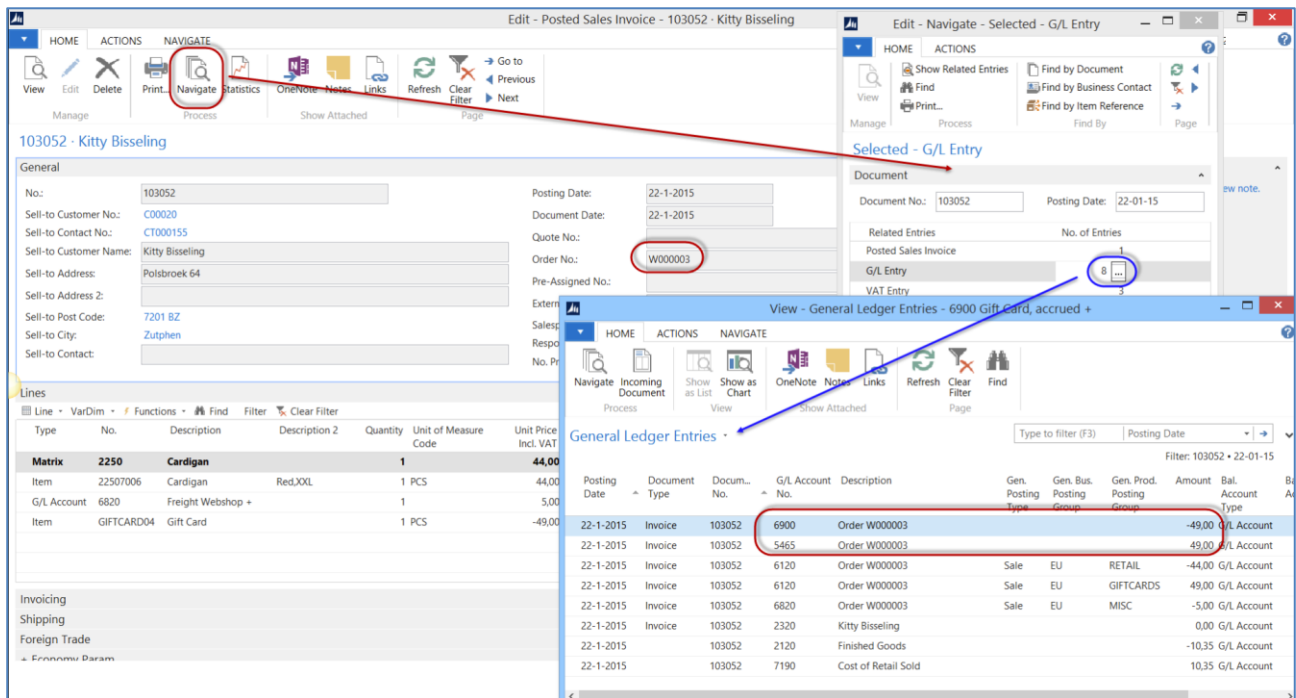
Payment Terms Code:

14 DAYS

Disable Order Blocking:

☐

In the **Posted Sales Invoice** you will also find the **Provision Sales G/L Entries** again, as we have setup in [Provision Sales](#).



End result:

On the G/L Accounts of **Provision Sales** you will see the total amount of Gift Cards that have not been used.

We bought one of 50,00 GBP; we paid an order of 49,00 GBP: remaining = 1,00

General Ledger Entries										
Posting Date	Document Type	Document No.	G/L Account No.	Description	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount	Bal. Account Type	Entry No.
22-1-2015	Invoice	103051	6900	Order W000002				50,00	G/L Account	2885
22-1-2015	Invoice	103052	6900	Order W000003				-49,00	G/L Account	2893

PROMOTIONS

Promotion is used in TRIMIT B2C as another discount option. Promotions can be created or found in TRIMIT via the following path: **Departments / TRIMIT Portals / B2C / Promotions**.

Type	Description	Value	Start Date	Expiry Date	Once per Customer	Not on Campaign Items	Customer Club Level	Passcode
Discount Code	10 Percent	10,00			☐	☒	Level 0	70BD3226

Description of the fields

TYPE

Select the B2C Shop Promotion's type.

You can choose the following two options:

Blank	The line will not be accepted. This option is reserved for customizations
Discount Code	The promotion/voucher is set to be as a Line Discount on a Sales Order Line

DESCRIPTION

Specify the B2C Shop Promotion Description here.

VALUE

Specify the B2C Shop Promotion Discount Percentage here.

START DATE

Specify the Promotions validity Start Date here

EXPIRY DATE

Specify the Promotions validity Expiry Date here.

ONCE PER CUSTOMER

If set to *TRUE* then system allows usage of the Voucher (Passcode) only once per Customer.

If set to *FALSE* then usage of the Voucher by the same Customer is unlimited if other conditions allow this.

NOT ON CAMPAIGN ITEMS

If set to *TRUE* then this voucher cannot be applied to Items which price has already been decreased based on a Campaign.

If set to *FALSE* then the voucher can be applied to Items with reduced prices

CUSTOMER CLUB LEVEL

Set a Customer Club Level from which the voucher can be available.

Available options: *Level 0, Level 1, Level 2, Level 3, Level 4, Level 5*

PASSCODE

The passcode will be auto generated after entering the Promotions Value.

Promotion's information can be given/sent to a customer. Promotion's **Passcode** can be used on the **Confirm order** page on B2C Shop in the same field as a Gift Card.

Discount Percentage, specified by Promotion, will be deducted on the B2C Shop from the **Total** for every Item for current Order after entering the Passcode in **Vouchers & gift cards** and clicking **Apply** button.

Item	Description	Color	Size	Quantity	Price	Total
	Cardigan	Red	XXL	1	44.00 GBP	44.00 GBP

Vouchers & gift cards

Comment

Wrapping test another line
Yes, I would like wrapping for 1.50 ☐

Delivery: GLS to Home Address
5.00 GBP

Total price incl. VAT
49.00 GBP

☐ I accept [terms and conditions](#)

< Delivery > Pay now simulation

All additional expenses as delivery, wrapping, etc. will be added afterwards and will not be effected by the Promotion Discount.

Item	Description	Color	Size	Quantity	Price	Total
	Cardigan	Red	XXL	1	44.00 GBP	39.60 GBP

Vouchers & gift cards

Comment

Wrapping test another line
Yes, I would like wrapping for 1.50 ☐

Delivery: GLS to Home Address
5.00 GBP

Total price incl. VAT
44.60 GBP

☐ I accept [terms and conditions](#)

< Delivery > Pay now simulation

Promotion is meant to be used unlimited times unless it is specified otherwise in the setup.

In TRIMIT the Promotion Discount will be handled as a Line Discount % on every Sales Line of the Order.

W000007 · Kitty

General										C00040	29-1-2015	Open
Lines												
Line VarDim Related Order Functions Order Find Filter Clear Filter												
Expa...	Type	No.	Description	Description 2	Qua...	Unit of Measur...	Unit Price Incl. VAT	Line Discount %	Line Discount Amount	Line Amount Incl. VAT		
☒	Matrix	2240	Ladies Sweater		1		44,00	10	4,40	39,60		
☐	Item	22403504	Ladies Sweater	Orange,L	1	PCS	44,00	10	4,40	39,60		
☐	G/L A...	6820	Freight Webshop +		1		5,00		0,00	5,00		