



Functions and Options

# Gift Sale

- Actions
- Gift Sale
- Loyalty Sale
- Merchandise Return Credit

Card  kb

Amount  kb    Fixed    Full

Points  kb

Invoice  kb

Iip  kb

Do not save Loyalty information

Card Data    Last Transactions

Card / Customer

Gift Data	
Credit	0.00
Debit	0.00
Balance	0.00

Loyalty Data	
Spent Amount	0.00
Visits	0
Points	0

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Available Actions   **Gift Sale**   Action Title

Actions

**Gift Sale**

Loyalty Sale

Merchandise Return Credit

Card: [ ... ] kb

Amount: [ ] kb   Fixed   Full

Points: [ ] kb

Invoice: [ ] kb

Tip: [ ] kb

Do not save Loyalty information

OK

Clear

Card Data   Last Transactions

Card / Customer		Loyalty Data	
Gift Data		Loyalty Data	
Credit	0.00	Spent Amount	0.00
Debit	0.00	Visits	0
Balance	0.00	Points	0

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# Gift Sale

Actions



Gift Sale



Loyalty Sale



Merchandise Return Credit



Card  kb

Amount  kb   Fixed   Full

Points  kb

Invoice  kb

Iip  kb

Do not save Loyalty information

OK

Clear

Transaction Input Area

Card Data   Last Transactions

Card / Customer

Gift Data

Credit	0.00
Debit	0.00
Balance	0.00

Loyalty Data

Spent Amount	0.00
Visits	0
Points	0



### Card Lookup

# Gift Sale

#### Actions



Gift Sale



Loyalty Sale



Merchandise Return Credit



Card  kb

Amount  kb

Points  kb

Invoice  kb

Iip  kb

Do not save Loyalty information

Utilizes Magnetic Stripe, Bar Code, or Manual Search

Card Data | Last Transactions

#### Card / Customer

Gift Data	
Credit	0.00
Debit	0.00
Balance	0.00

Loyalty Data	
Spent Amount	0.00
Visits	0
Points	0



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# Gift Sale

Predefined Value

**Actions**

Gift Sale

Loyalty Sale

Merchandise Return Credit

Card ... 1003

Amount 25

Points 250

Invoice 250 sale

Tip

Do not save Loyalty info

Fixed Full

\$25.00

Full Value

OK

Clear

These Features Reduce Data Entry

Card Data Last Transactions

Card / Customer 1003 / Melissa Morgan

Gift Data

Credit	\$25.00
Debit	\$0.00
Balance	\$25.00

Loyalty Data

Spent Amount	\$0.00
Visits	0 (last 12:01:00 AM)
Points	0



# Gift Sale

**Actions**

Gift Sale

Loyalty Sale

Merchandise Return Credit

Card

Amount

Points

Invoice

Iip

Do not save Loyalty information

**Card Information Area**

Card Data | Last Transactions

Card / Customer 1003 / **Melissa Morgan**

<b>Gift Data</b>		<b>Loyalty Data</b>	
<u>Credit</u>	\$25.00	Spent Amount	\$0.00
Debit	\$0.00	Visits	0 (last 12:01:00 AM)
Balance	\$25.00	Points	0



# Gift Sale

**Actions**

Gift Sale

Loyalty Sale

Merchandise Return Credit

Card

Amount

Points

Invoice

Iip

Do not save Loyalty information

**Quick Links to data / reports**

Card Data

[Card / Customer](#) 1003 / **Melissa Morgan**

Gift Data		Loyalty Data	
<a href="#">Credit</a>	\$25.00	Spent Amount	\$0.00
Debit	\$0.00	Visits	0 (last 12:01:00 AM)
Balance	\$25.00	Points	0

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# Gift Sale

**Actions**

 Gift Sale

 Loyalty Sale

 Merchandise Return Credit

Card  kb

Amount  kb   Fixed   Full

Points  kb

Invoice  kb

Iip  kb







OK

Clear

Do not save Loyalty information

**Quick Transaction History**

Card Data **Last Transactions**

Action	Card No	Amount	Points	Record Date
 Gift Sale	99	\$1.00	10	02/11/03 22:55
 Add Value	99	\$1.00	0	02/11/03 22:54
 Gift Sale	1003	\$26.98	270	02/11/03 21:33
 Add Value	1003	\$25.00	0	02/11/03 21:31
 Loyalty Sale	1003	\$25.00	250	02/11/03 21:30
 Add Value	1003	\$25.00	0	02/11/03 21:02



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# Balance

Actions

Card Activate / Deactivate

**Balance**

Tips

Visits

Card  kb

Print

Name	Debit	Credit
Issued Value		
Corrections		
Added Value		<b>\$50.00</b>
Merchandise Return Value		
Redeemed Value		
Gift Sales	<b>\$26.98</b>	
Tips		
Total	<b>\$26.98</b>	<b>\$50.00</b>
<b>Balance</b>		<b>\$23.02</b>
Loyalty Sales		<b>\$25.00</b>
Loyalty Points		<b>519.8</b>
Loyalty Visits		<b>2</b>
Spent Amount		<b>\$51.98</b>

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Pre-defined reports

- Sales
- Daily Sales
- Daily Changes
- Daily Loyalty Report
- ReportAll

# Gift Sale

Actions



Gift Sale

kb   Fixed   Full

Points kb

Invoice kb

Tip kb

All reports export to Excel files

OK

Clear

Loyalty

Merchant

Report "Sales"

Action	Amount	Tip	Points	Invoice	Employee Card	Employee	Customer Card	Customer
Loyalty Sale	150	0	1500				1234	Mr. Robert Cam
Loyalty Sale	25	0	250				1003	Mr. Melissa Mor
Gift Sale	26.98	0	269.8				1003	Mr. Melissa Mor
Gift Sale	1	0	10				99	Mr. Bill Brucks
	202.98	0	2029.8					

Exit

Print

Filter

Export

## Detailed Report Query

**Report Unknown**

**All Actions**

- Gift Sale
- Loyalty Sale
- Merchandise Return Credit
- Loyalty Redemption
- Card Credit Change**
  - Add Value
  - Redeem Value
- Card Points Change**
  - Add Points
  - Redeem Points
- Card Activate / Deactivate**
  - Activate Card
  - Refund Deactivate Card
  - Void card
- Balance

Free Fixed

Employee	n.a.		...
Employee Card	n.a.		...
Customer	n.a.		...
Customer Card	exact	1003	...
Amount	n.a.		
Point	n.a.		
Tips	n.a.		
Date	in	2 / 4 /03	2 /11/03

Save Relative Dates     Show in Menu

Save As    Load    Reset    OK    Cancel



Log In



Cards



Reports



Setup



Utilities



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Hide



Exit

# Gift Sale

### Actions



Gift Sale



Loyalty Sale



Merchandise Return Credit



Loyalty Redemption



Card

Amount

Points

Invoice

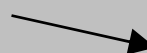
Tip

Do not save Loyalty information

OK

Clear

Touch Screen Features



Keyboard

1	2	3	ok
4	5	6	<-
7	8	9	
-	0	.	

Card Data | Last Transactions

Card / Customer 1003 / Melissa Morgan

#### Gift Data

Credit \$50.00

Debit -\$26.98

Balance \$23.02

#### Loyalty Data

Spent Amount \$51.98

Visits 2 ( last 2/11/03 9:34:00 PM)

Points 519.8





Log In



Cards



Reports



Setup



Utilities



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About



Hide



Exit

# Sale

- Operators ...
- Operator Templates ...
- Receipts ...
- Loyalty offers ...
- Fixed Values
- Screen Keyboard ...
- Card Reader ...
- Receipt Printer ...
- Report Printer ...
- Preferences ...

Setup & Configuration Options

Actions



Gift Sale



Loyalty Sale



Merchandise Return Credit



Loyalty Redemption



Card   
 Amount  
 Points  
 Invoice  
 Tip

kb  
 Fixed Full  
 kb  
 kb

OK  
 Clear

Card Data | Last Transactions

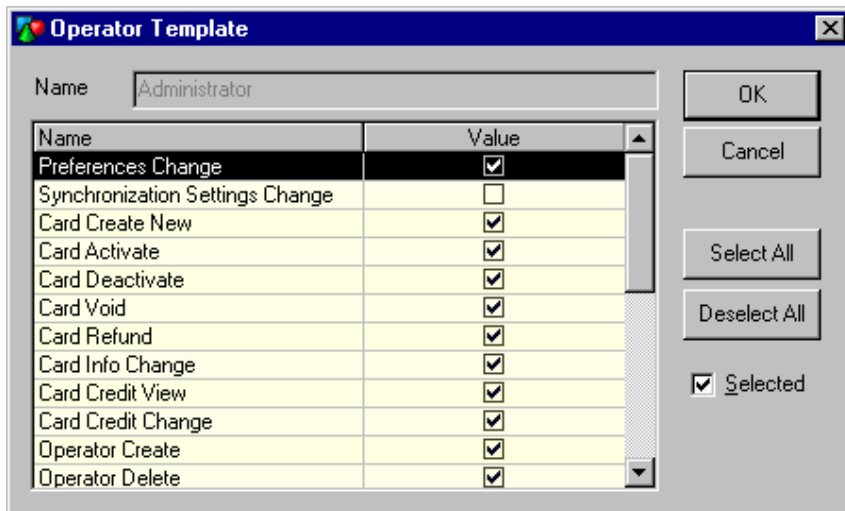
Card / Customer 1003 / Melissa Morgan

Gift Data

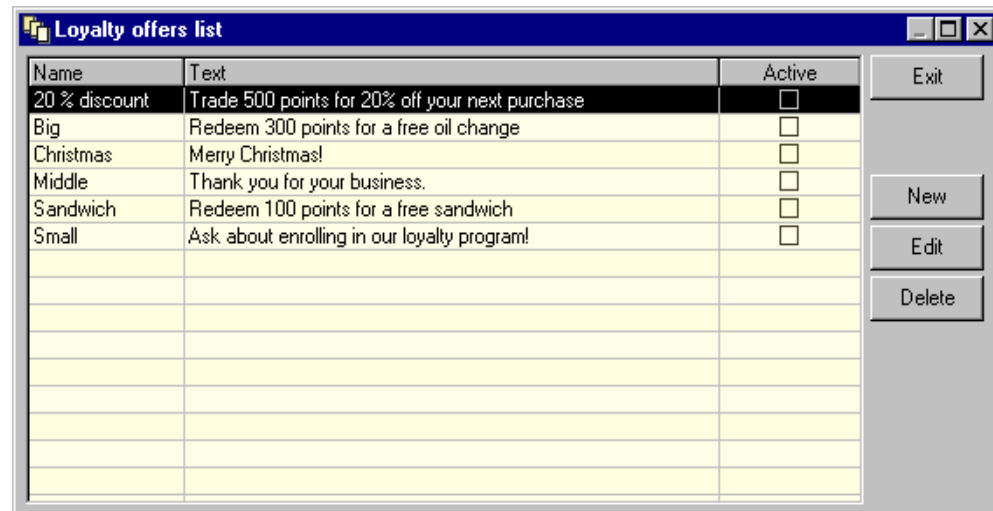
<u>Credit</u>	\$50.00
<u>Debit</u>	-\$26.98
Balance	\$23.02

Loyalty Data

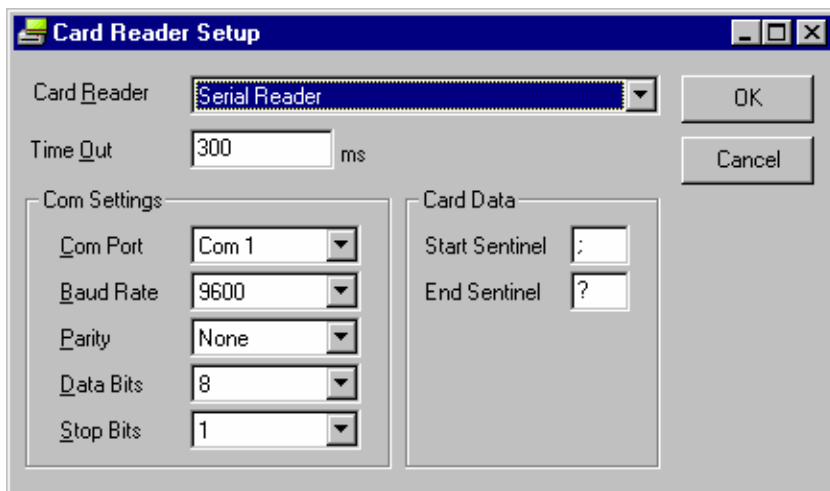
Spent Amount	\$51.98
Visits	2 ( last 2/11/03 9:34:00 PM)
Points	519.8



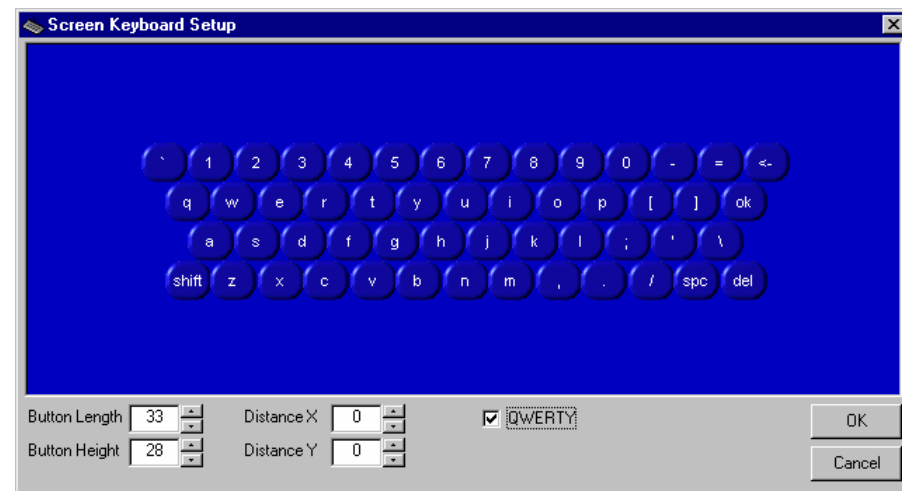
**Define User Types & Rights**



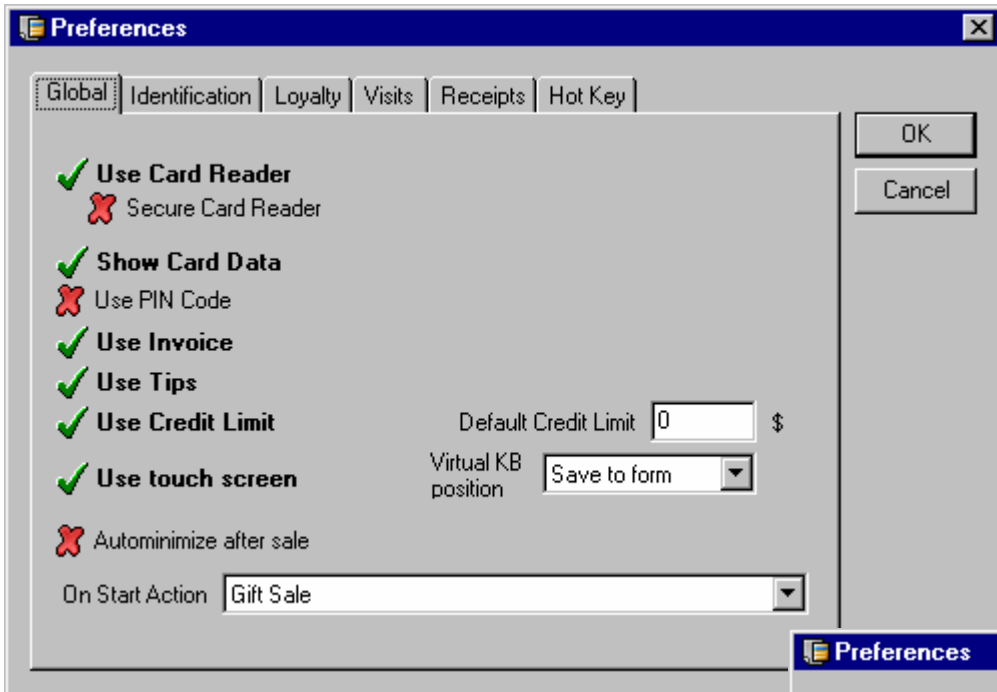
**Create Loyalty Offers**



**Setup Card Reader**

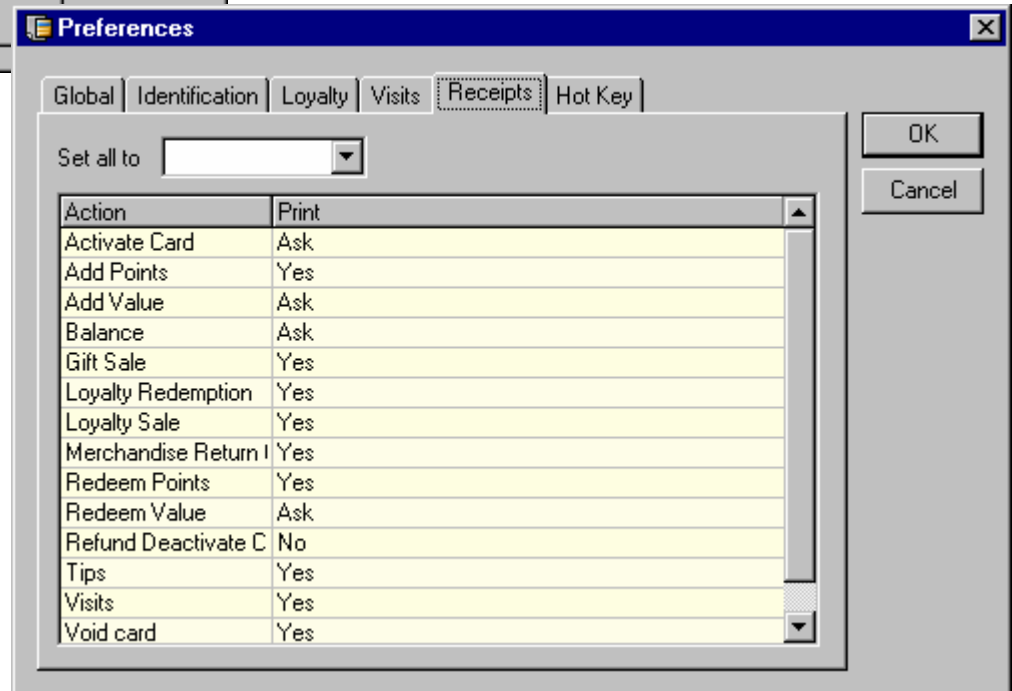


**Set Touchscreen Preferences**

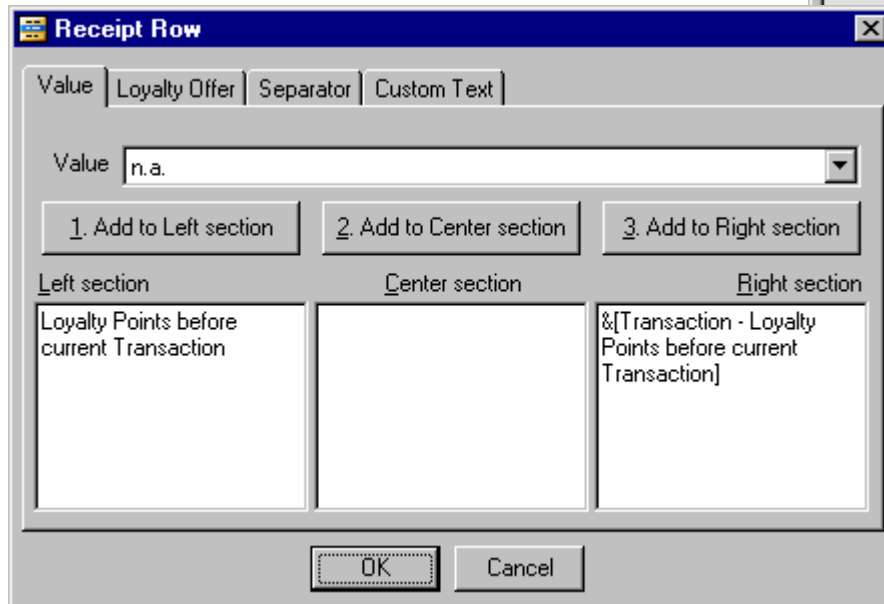
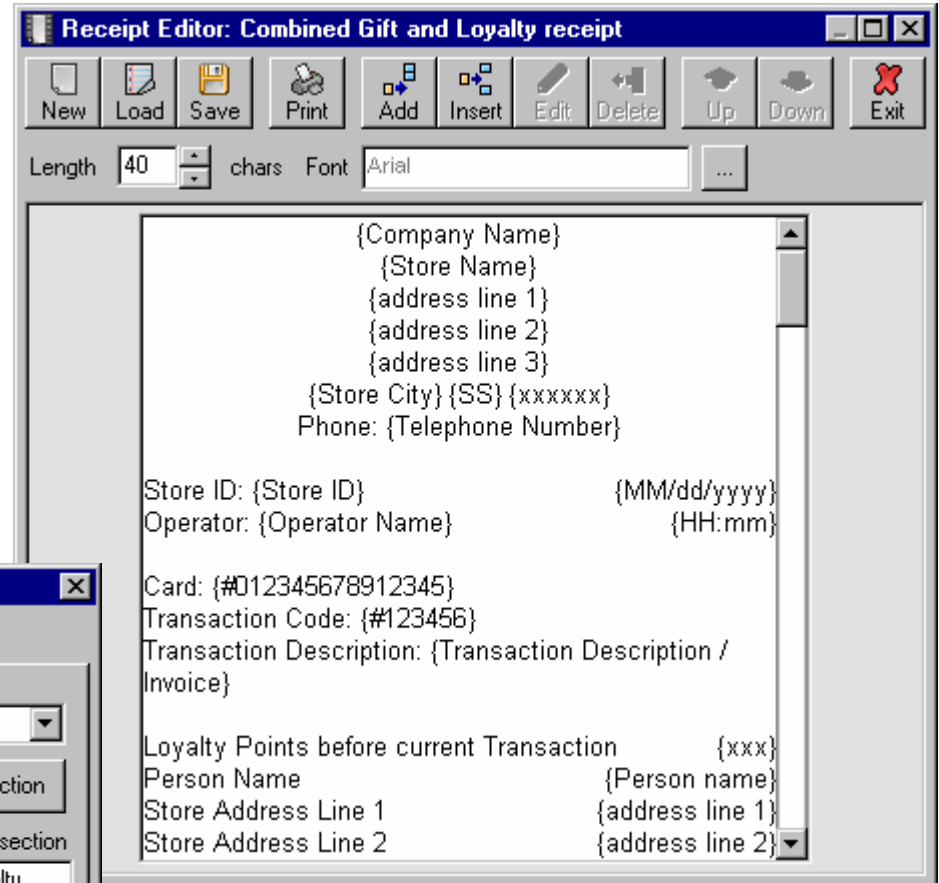
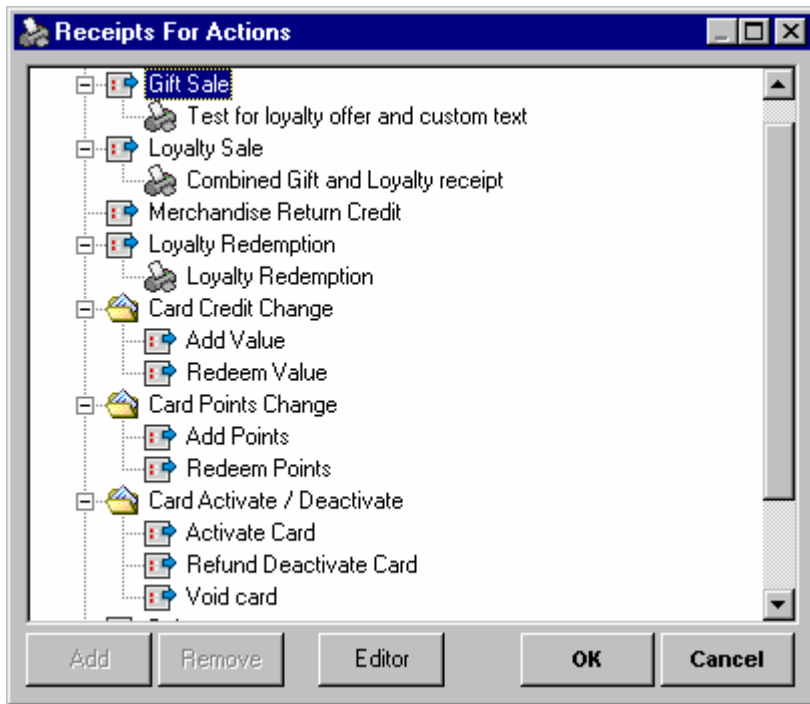


## Set Global Variables

## Define Printing Behavior



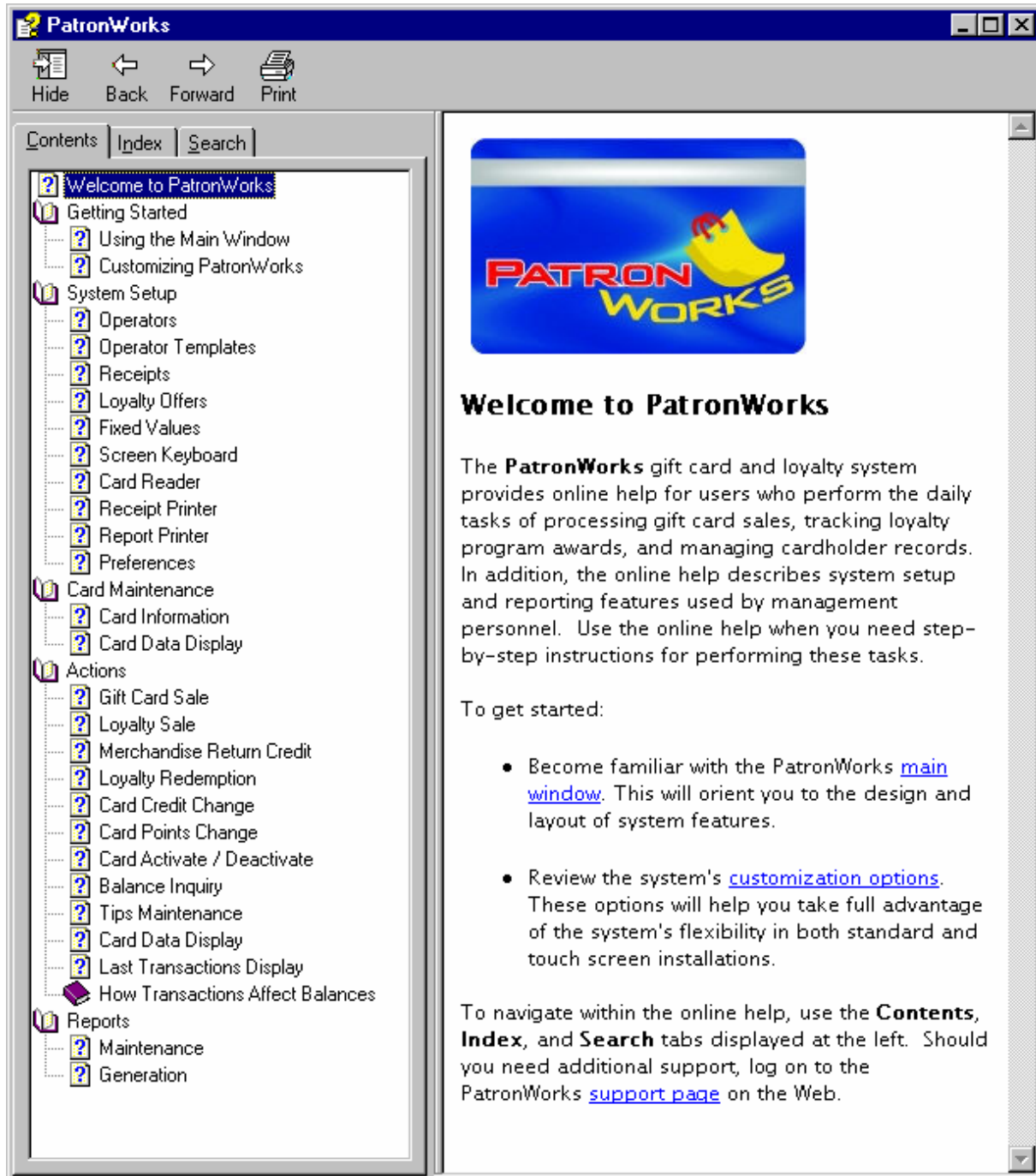
## Separate Receipt for every action



**Fully customizable receipts – ultimate flexibility**



## Complete online help system



**PatronWorks**

Hide Back Forward Print

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### Welcome to PatronWorks

The **PatronWorks** gift card and loyalty system provides online help for users who perform the daily tasks of processing gift card sales, tracking loyalty program awards, and managing cardholder records. In addition, the online help describes system setup and reporting features used by management personnel. Use the online help when you need step-by-step instructions for performing these tasks.

To get started:

- Become familiar with the PatronWorks [main window](#). This will orient you to the design and layout of system features.
- Review the system's [customization options](#). These options will help you take full advantage of the system's flexibility in both standard and touch screen installations.

To navigate within the online help, use the **Contents**, **Index**, and **Search** tabs displayed at the left. Should you need additional support, log on to the PatronWorks [support page](#) on the Web.



Questions?  
Contact Us At

847-850-2577

[gary@patronworks.com](mailto:gary@patronworks.com)

Plus... many more features, more than  
we could cover in this overview.

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**Think inside the wallet.**

