

Retail Omni Selling Gift Cards Online

Introduction

In a nutshell, we will be creating a Non-Inventory matrix and each matrix variant will be a different denomination of the Gift Card's value. We will also be creating a Tax override in the ecom site, which will keep you from collecting taxes on Gift Card sales.

Disclaimer:

- This how-to article is provided as-is.
- Although you will be able to sell gift cards online, they can only be redeemed in-store, unless you use the Discount Code custom solution explained at the end of this guide.

Get Started

Let's begin!

Let's create a new Matrix Attribute Set called Gift Card Amount.

- 1 Log into your Retail POS and navigate to **Inventory > Matrix Attribute Sets**
- 2 Click on [New Matrix Attribute Set](#)
- 3 Name it "Gift Card Amount" or "Amount"
- 4 Make sure it stays as 1 Attribute and save changes:



The screenshot shows a form with three input fields. The top field contains the text "Gift Card Amount". The middle field is a dropdown menu currently showing "1 Attribute" with a small up/down arrow icon. The bottom field also contains the text "Gift Card Amount".

Create a Category called eCom Gift Cards

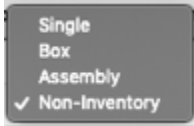
- 1 Go to **Inventory > Categories > New Category** > Give it a **name** example: eCom Gift Cards

Now let's create the Matrix!

- 1 Navigate to **Inventory > Matrix** > Click on [New Matrix](#)

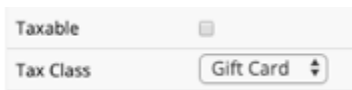
2 Give it a name in the Description field. Ex. Gift Cards, eCom Gift Cards, etc.

3 Change the matrix type to Non-Inventory:



4 Assign the previously created Category

5 Uncheck the Taxable option and select the Gift Card Tax Clas:



6 Under the Matrix Type box (left-hand-side) select the previously created Attribute. Ex. Amount, Gift Card Amount

7 In the Default Price and Online Price fields, enter the price of the lowest tiered gift card amount. For example, if the lowest Gift Card amount you intend to sell is \$25, enter \$25 in each of those fields. Save changes.

8 Now we need to enter the gift card amount options in the Gift Card Amount Box.

For example,

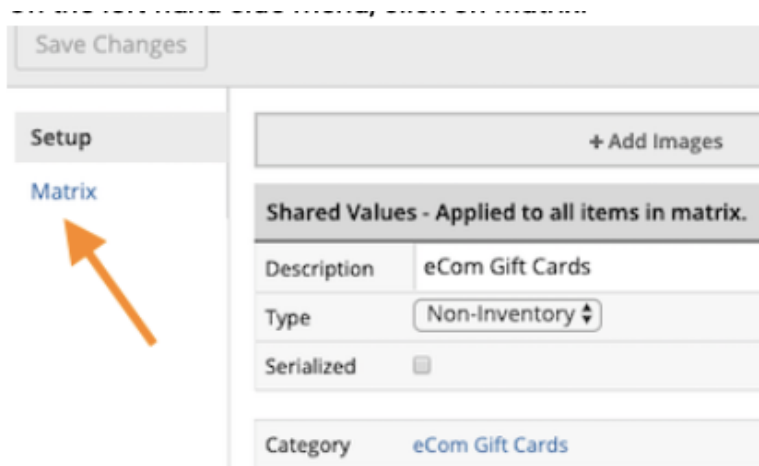
Gift Card Amount	
::	25
::	50
::	75
::	100
::	

9 Once you have determined what your denominations will be, click on Save Changes

Now, let's create the denomination variants!

1

On the left-hand side menu, click on Matrix:



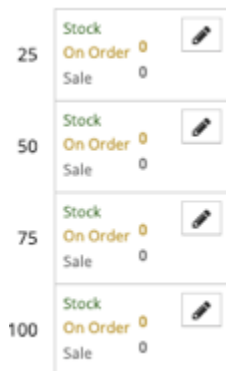
2

To create each variant, click the plus sign (+) next to each denomination (variant):



3

Once you are done, it should look like this:



The next steps take place on the eCommerce side. Switch over to it.

We need to make sure that the Gift Card is not taxable in eCom. To do that we need to create a Tax Override.

First, we need to create a [Tax Class](#):

1

On the left menu of the eCom Back Office click **Settings > Payment Settings > Taxes**.

2 Click **United States (or Canada)**.

3 From **Tax Classes** click **Add a tax class**.

4 Give the tax class a name, such as *Gift Card*

5 Click the tax class you created.

6 Click **Add products**

7 Search for Gift Card (or the name you assigned to your Matrix)

8 Click **Choose** beside the Gift Card product to add it to the tax class:



9 Click **Save**.

Now let's create the Tax Override:

10 Click on Close

11 **Click on** Back to United States (or Canada)



12 Click **Add a tax override** and select the **tax class** you created:

Add a tax override x

Tax class

Select a tax class v

Gift Card

Close Save

13 In the Tax Override area, click the tax override to configure it.

14 In the Tax Rates area, for each state that you have a store in, **ZERO** as the rate:

Name	Rate
Indiana (State)	0 %
Indiana State (County)	0 %
City tax (City)	0 %
District tax (District)	0 %


15 Make sure the tax "Enable tax override" is toggled ON, and save changes:

Enable tax override

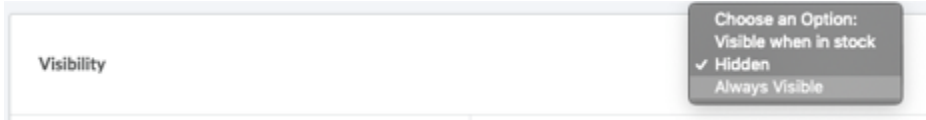
The next and final step in to make the product visible!

1 In eCom, navigate to Products

2 Locate and click on your Gift Card product:

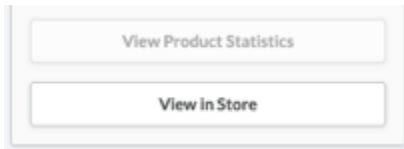
<input type="checkbox"/>		Product
<input type="checkbox"/>		eCom Gift Cards

3 Change its visibility from "Hidden" to "Always Visible" and save changes:



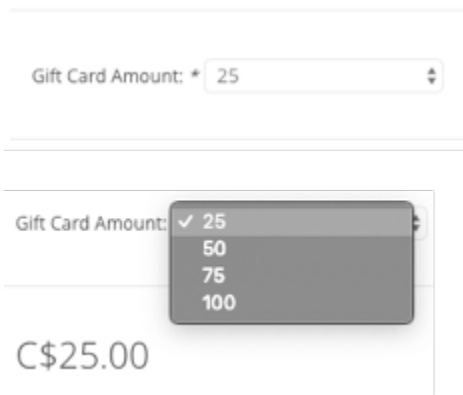
4

Click on View in Store:



5

A new tab will appear, and you will see your Gift Card product, along with a drop-down!



Additional information

- You can set up an image to it in Retail
- It's good practice to let the customer know that the gift card can only be redeemed in-store, therefore we recommend that you specify that in the product's content section.
- You can increase the visibility of the Gift Card product by adding it to the navigation menu. This is done by navigating to Products > Categories > Click on the Gift Card category > Scroll down to Visibility > Toggle on "Include in catalogue".
- If you wish to sell gift cards online with the intent of having the customer use it at the checkout, you must create a discount code for the amount of the gift card. For example, if someone purchases a \$25 gift card you will create and email the customer a \$25 OFF discount code. However, the customer must use the \$25 discount in its entirety. Make sure to enable usage limits and set the discount code's usage limit to 1 time.

Resources:

- [Creating discount codes](#)
- [Creating custom matrix attribute sets](#)

- [Creating matrices](#)
- [Changing automatic taxes by creating a tax override](#)

How to fulfill an order with a gift card

- 1 Once the customer pays for the order online, you will be able to see it on the Retail side by going to **Reports > All transactions > filter by the date of the order > pick the eCom register > Search**
- 2 Once you find the transaction you need to click on the **ID** and open it
- 3 Click on "**Refund**" on the top left. This will redirect you to the Refund page
- 4 Click on the "**REFUND**" button for the gift card item only
- 5 Navigate back to the "**SALE**" tab and add a gift card, add the amount and scan the number
- 6 At this point, you should be seeing a balance of **0\$**
- 7 Finish sale under the eCom payment method
- 8 Your gift card is active and ready to be sent to the customer (shipped or send the gift card number by email)

Here are some useful articles you can use for the setup:

- [Understanding gift cards](#)
- [Doing refunds and exchanges](#)