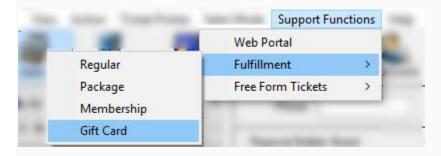
Gift Card Bulk Fulfillment

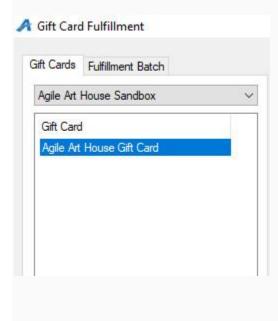
Clients that sell their Gift Cards online can process the cards through bulk fulfillment to fulfill these cards. Follow the steps below:

Fulfillment to Assign the Amount to Gift Cards

- 1. Log into Agile and Cash In.
- 2. At the top of the screen, click **Support Functions/Fulfillment/Gift Cards**.



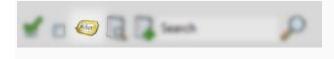
3. In the Gift Card Fulfillment window, select the Gift Card program that is listed (i.e Agile Art House Gift Card, etc.).



4. You will see a list of orders that need to be fulfilled. Checkmark the order(s) you wish to fulfill.

Delivery	Order#	BuyerType	Customer#	Customer Name	Gift Card	Balance Due
🗹 Gift Card Mail	139611	AMS - Box Office	94583	Smith, John	Agile Art House Gift Card	\$0.00
Gift Card Mail	139612	AMS - Box Office	74002	Munster, Herman	Agile Art House Gift Card	\$0.00
Gift Card Mail	139613	AMS - Box Office	94756	Potter, Harry	Agile Art House Gift Card	\$0.00

5. Click the **Ticket** Icon at the bottom of the screen.



- 6. In the Fulfillment Options window:
 - * Uncheck the Print Payment Receipts

A fultility of Options			
Selected Optoria			
Header Format	No Header Per	e	
Order Receipt	No Peccept Per	e v	
Print Payment Receipts			
Sant Onders By	Last Name		
Batch Description			
How to fulfill pill cards	O favo git car O favo favoge		
Available Protect		Selected Porters	
		Total Partie (Total)	
	20		
	14		
Futboard Surroup From Speen Card Dimension 1 (24 Cards / 1 Numbers St Differentiate 1 Tatal	i Tepul		
		OK Canod	

* Select the Print/Assign gift cards Radio Button

Fulfilment Options			×
Intented Options			
Headler Format	No Header Pers		
Dritter Receipt	No Record Pers		
Print Payment Receipts			
fart Onlers By	Last Name		
land-Description			
low to fulfill gift	Character		
ards	Print/Assign gif	t cards	
Available Printers		Selected Protein	
		Taket Pinter (Taket)	
	200		
ultiment Surmary no Types Card Namber GR Cards / 1 Numbers To Recepto Total	ingent		

* Make sure that the "Faux Printer" is in the Selected Printers column.

A Fulfilment Options			ж
Selected Options			
Header Format	No Header Pers		
Order Receipt	No Percept Perc		
Proc Payment Receipts			
Sart Onlars By	Last Name		
Batch Description			
Nov to fulfil pit cards	Class phone		
Available Promes		Selected Printers	
	20 A	No Print (Card)	
Additional Surrowy From Typess Card Interaction 1-Opt Cards / 1 Numbers To Interaction 1 Total	input		

 * Click on \mathbf{OK} to start the fulfillment process.

7. The Fulfillment Progress window will appear, and then the Gift Card Lookup window will appear.

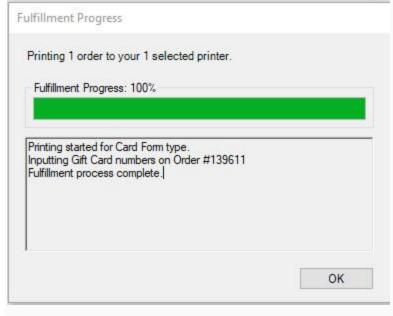
Printing 1 order to your 1 selected print	ter.
Frinting 1 order to your 1 selected prin	ler.
Fulfillment Progress: 0%	
Printing started for Card Form type.	20011
Printing started for Card Form type. Inputting Gift Card numbers on Order #1	39611
Printing started for Card Form type. Inputting Gift Card numbers on Order #1	39611
Printing started for Card Form type. Inputting Gift Card numbers on Order #1	39611
Printing started for Card Form type. Inputting Gift Card numbers on Order #1	39611
Printing started for Card Form type. Inputting Gift Card numbers on Order #1	39611

🔏 Gift Card Lookup	×
Number	
	PIN
Current Balance:	Search
Active Assig	Cancel

8. Enter the Gift Card Number to assign the amount the customer has purchased. You can manually enter the number, or, if you have a credit card swipe attached to your computer, you can swipe the card. Click **Search** to find the PIN and then click **Assign** to add the amount to the card.

🗚 Gift Card Lookup		×
Number 308609164810	53111	
	PIN	5457
Current Balance: \$0.00		Search
Active 🔽	Assign	Cancel

9. Click on **OK** to complete the Fulfillment process.



Printing the Gift Card Letters for Mailing

- 1. Switch to Administration in Agile.
- 2. Open the **House** Icon to see all the folders in the organization tree.



3. Click the Green **Customer Relations** folder.



4. Select Emails and Letters.



5. Right-click on Gift Card Fulfillment Letter, and select Properties.

Subject	Data Set	Last Activity
Members Only Event!	Current Membership With Level Selection	
Sandbox Email	Event Email Extract	
Welcome to the Agile Art House Family	Membership Letters	
You membership is due to expire	Membership Renewal Notice With Level Select	ion
Gift Card Fulfilment Letter	New Confland Letters	3/2/2018
	Properties	
	3	

6. Click the **Set Parameters** button.

to be ideal / Late	-	Description	-
Set Parameters	in a	or Data	

7. In the Variables tab, select the Fulfillment batch that you just printed from the dropdown and select **OK**.

Variables Gift Card			
Fulfillment Batch			
Show batches for last 1 Week	~		
3/2/2018 2:01 PM - 30223 - hbiber	~		
3/2/2018 2:01 PM - 30223 - hbiber			
3/2/2018 12:05 PM - 30222 - hbiber 3/2/2018 12:03 PM - 30221 - hbiber			
3/2/2018 12:02 PM - 30220 - hbiber			
3/2/2018 12:02 PM - 30219 - hbiber			
		ОК	Cance

8. The orders you just printed will appear in the Data Set window.

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e TN
3
Apply

Data Dat Eral / Latter Body	Description	Preview						
Sectionation 8								
	laport Data							
GACadNare		FrontingName	Front and Farm	ToName	ShipAddees1	ShipAddress2	ShipCity	-
Colif.CardName	Amount	Frond indiana	Front addison		ShipAddeen1 1313 Muskingbird Lane	Ship-Address2	ShipCity Institute	Ebe Th

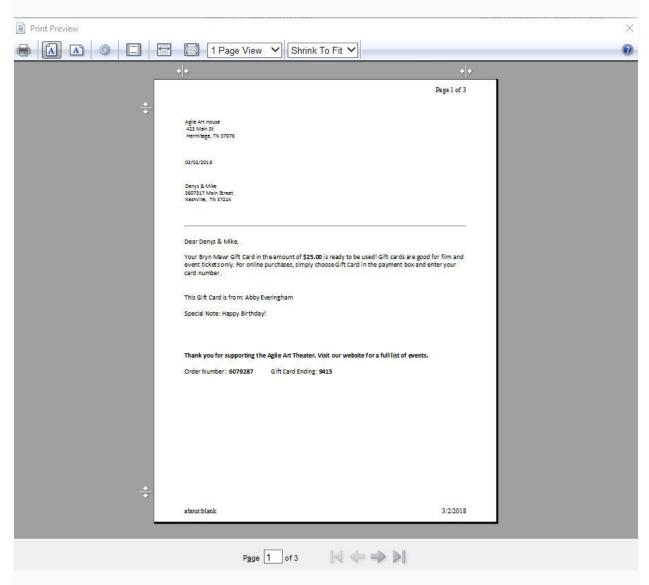
10. At the bottom of this window, click the **Show All** button, and then click **Print**.

A Email / Latter	-		×
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Data Sat Dout / Later Boly Description Persons			
To VallevallYs From sendless/Regists.com			
Subject: Gill Card Fulliment Latter			
Machinet			_
Agrie Art House Theater 433 Marin Wreat Hermitage Th 11111			Î
05/52/3014			
Herman Munster 1313 Mechingbird Lane Hermitage, Tel 37076			
Dear Herman Munster, Your Agile Art House Gift Card in the amount of \$75.00 is ready to be used! Gift cards are good for film tickets, o concessions and merchandise. For online purchases, simply choose Gift Card in the payment box and enter your number.		rships,	
This fills Food is former Mersons Mersons			¥
Show All Print		Serd 7	•
@ Perior Data Complete Data Anti-Indu Eng Send Dit Care		Auto	

11. A CRM Activity Log window will appear. Click **Yes** so that the activity log will be saved for when you printed these letters.

🔺 CRM Activity Log	9	\times
Description		
Gift Card Letters for Fulf	illment	
Туре:	PostalService	~
Create Activity Log?	Yes	No

12. The Print Preview window will open.



13. In the menu at the top of the screen, click the middle icon to turn the headers and

footers off.

Print Preview		×
🖶 🔝 🚳 🔲 🖻 🖾 1 Page View 🗸 Shrink To Fit 🗸		0
Turn headers and footers on or off (Alt+E)	+ +	
	Page 1 of 3	

14. You can click the arrows at the bottom of the window to scroll through each letter, if there is more than one letter.

X Post Preview		×
	1 Page View V Should To Fit V	
	<pre>status stat</pre>	
	Page 1 of 3	

15. Click the **Printer** Icon from the menu at the top of the window when you are ready to print the letters.

R Post Preview	
CO C	
Image:	
Page 1 ars ((((() + () + ())))	

16. Once completed, click **OK** to close the letter window.