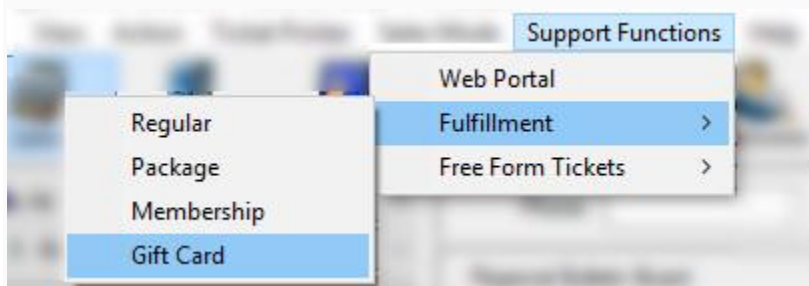


Gift Card Bulk Fulfillment

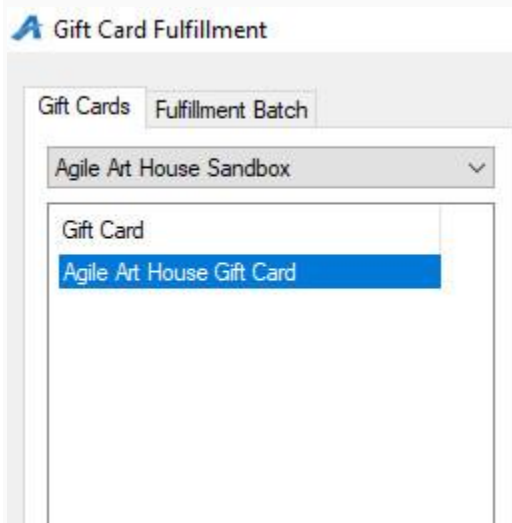
Clients that sell their Gift Cards online can process the cards through bulk fulfillment to fulfill these cards. Follow the steps below:

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.

Orders To Fulfill

Delivery	Order #	BuyerType	Customer #	Customer Name	Gift Card	Balance Due
<input checked="" type="checkbox"/> Gift Card Mail	139611	AMS - Box Office	94583	Smith, John	Agile Art House Gift Card	\$0.00
<input type="checkbox"/> Gift Card Mail	139612	AMS - Box Office	74002	Munster, Herman	Agile Art House Gift Card	\$0.00
<input type="checkbox"/> 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**

Fulfillment Options

Selected Options

Header Format: No Header Print

Order Receipt: No Receipt Print

Print Payment Receipts:

Sort Orders By: Last Name

Batch Description:

How to fulfill gift cards:

Save gift card info to file

Print/Assign gift cards

Available Printers:

Selected Printers: Ticket Printer (Ticket)

Fulfillment Summary:

From Types Card

0 Headers

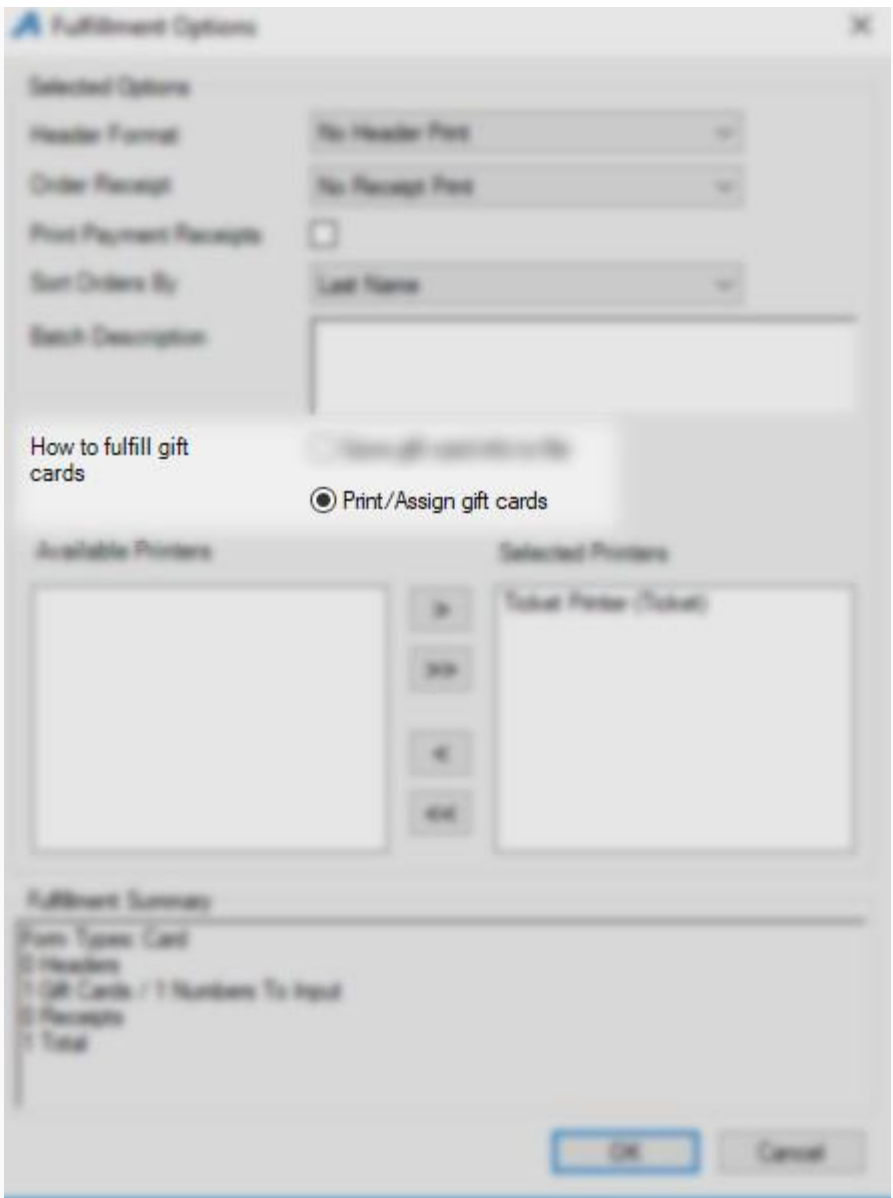
1 Gift Cards / 1 Numbers To Input

0 Receipts

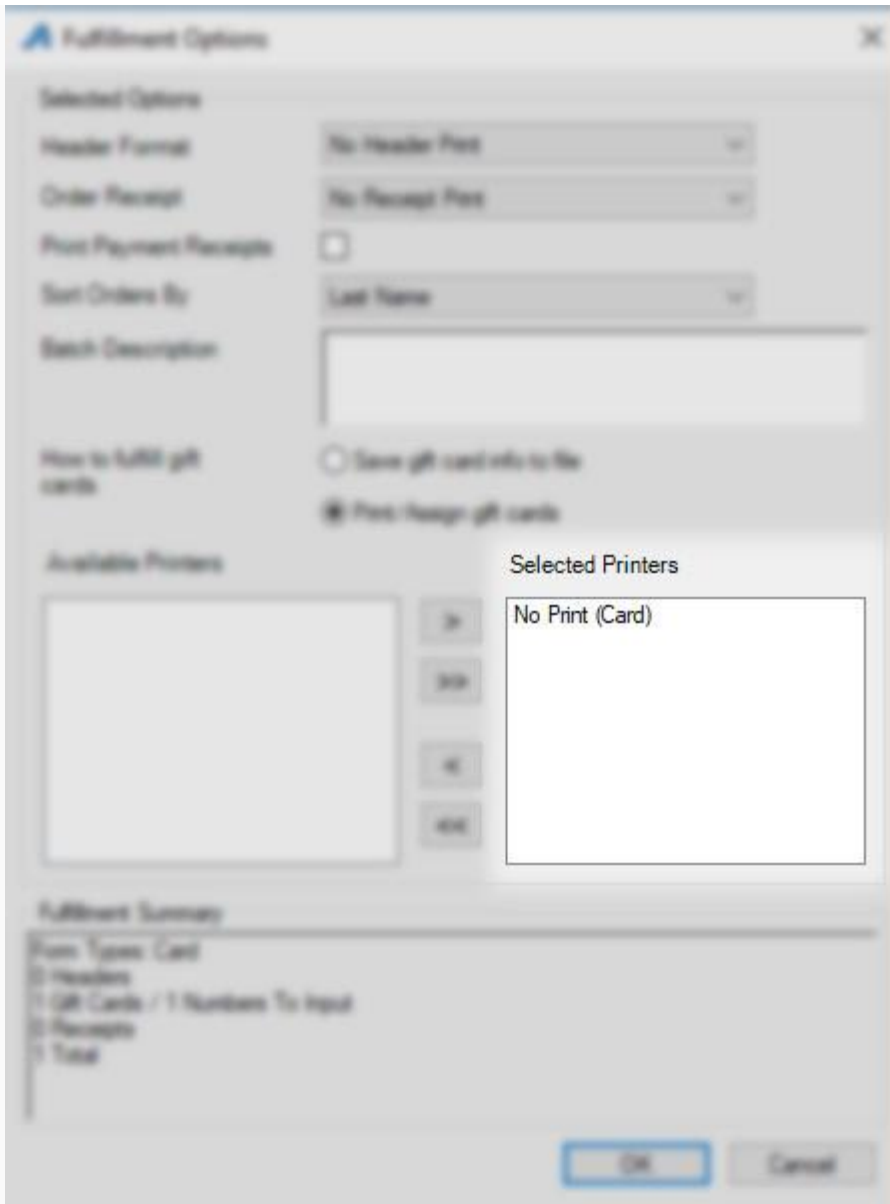
1 Total

OK Cancel

* Select the **Print/Assign gift cards** Radio Button

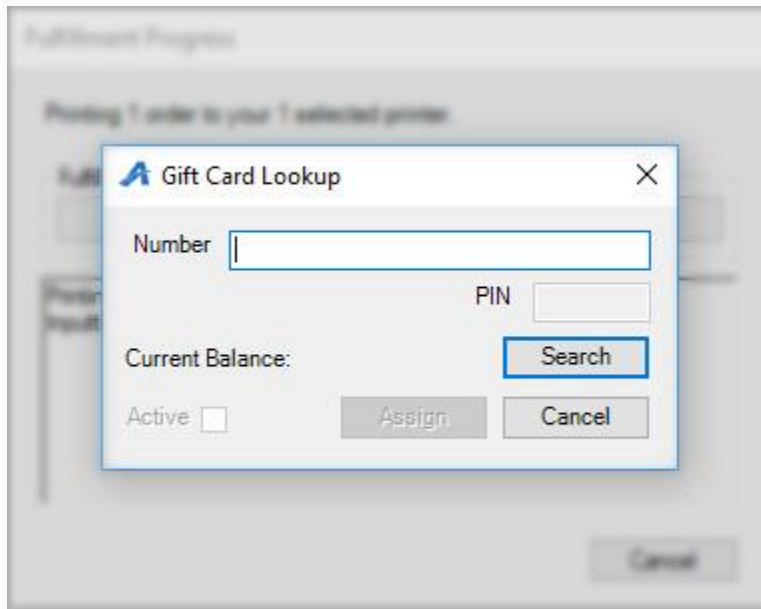
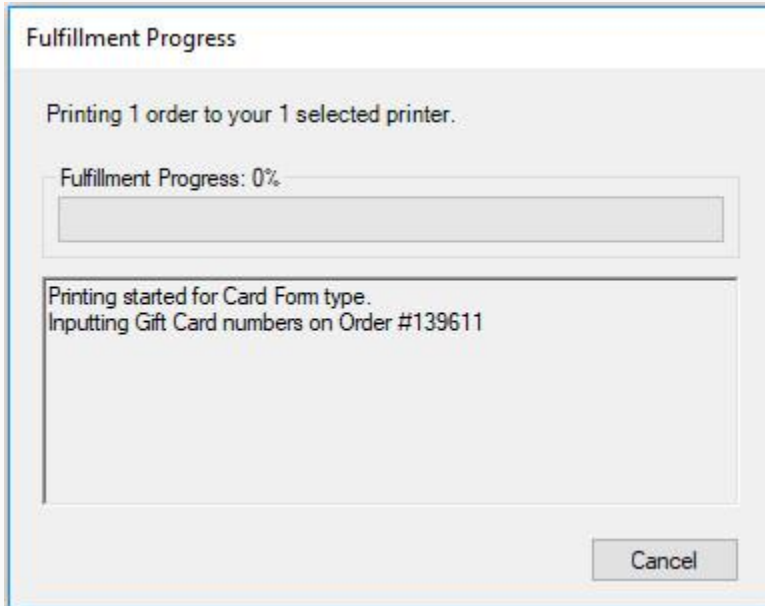


* Make sure that the "Faux Printer" is in the Selected Printers column.

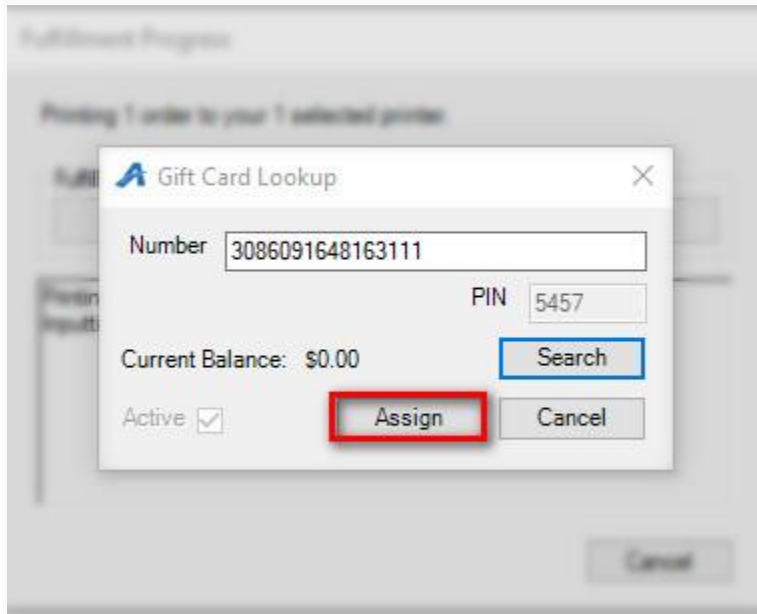


* Click on **OK** to start the fulfillment process.

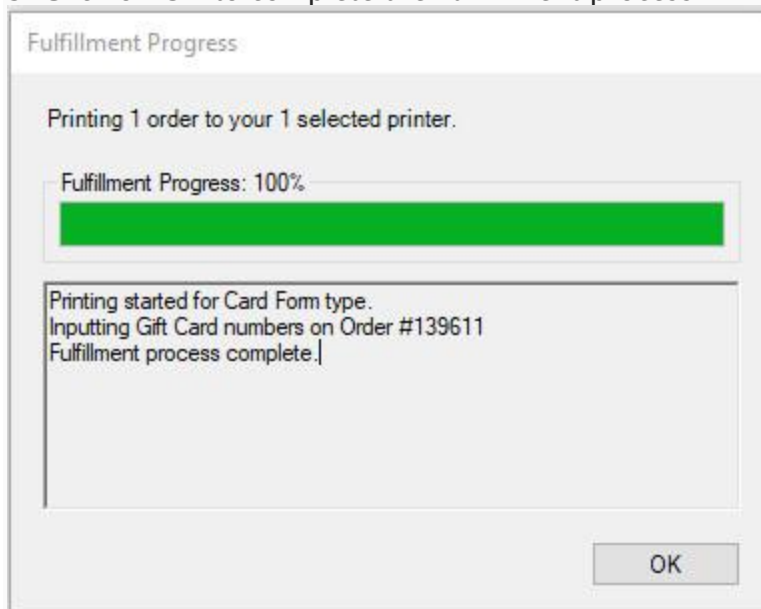
7. The Fulfillment Progress window will appear, and then the Gift Card Lookup window will appear.



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.



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



Printing the Gift Card Letters for Mailing

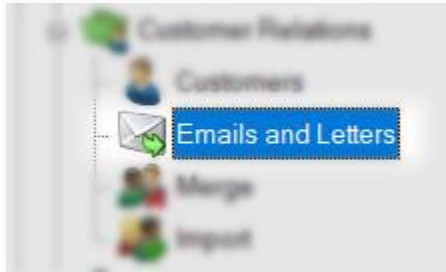
1. Switch to Administration in Agile.
2. Open the **House** Icon to see all the folders in the organization tree.



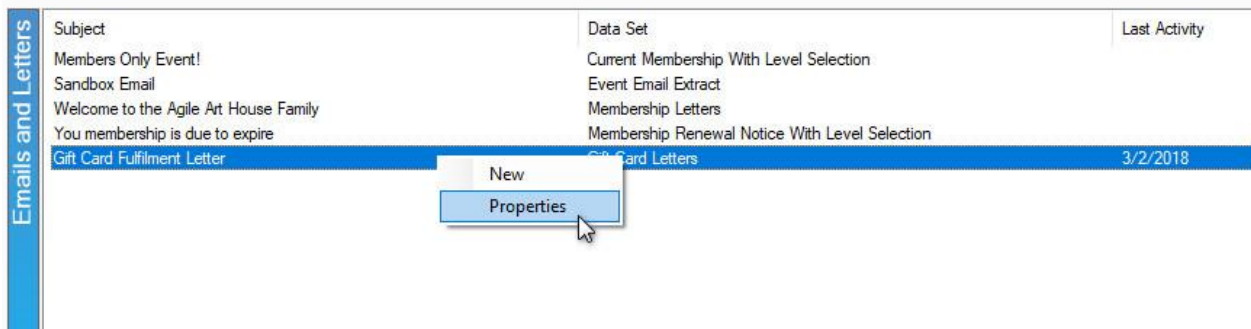
3. Click the Green **Customer Relations** folder.



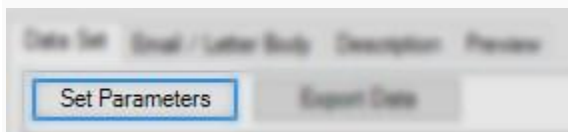
4. Select **Emails and Letters**.



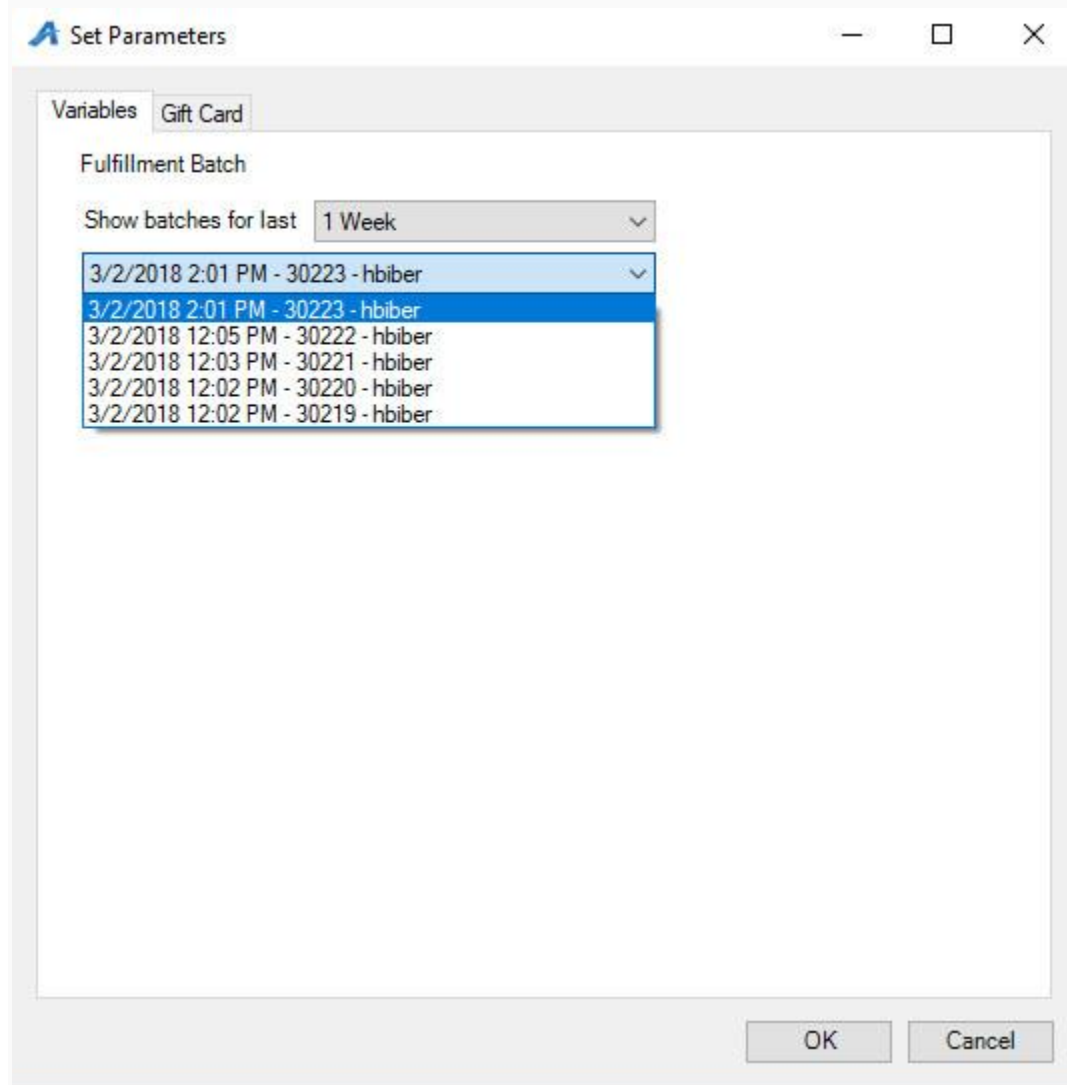
5. Right-click on **Gift Card Fulfillment Letter**, and select **Properties**.



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



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



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

The screenshot shows a window titled "Email / Letter" with a sub-header "Agile Art House Sandbox". Below the header are tabs for "Data Set", "Email / Letter Body", "Description", and "Preview". The "Data Set" tab is active, showing a table with the following data:

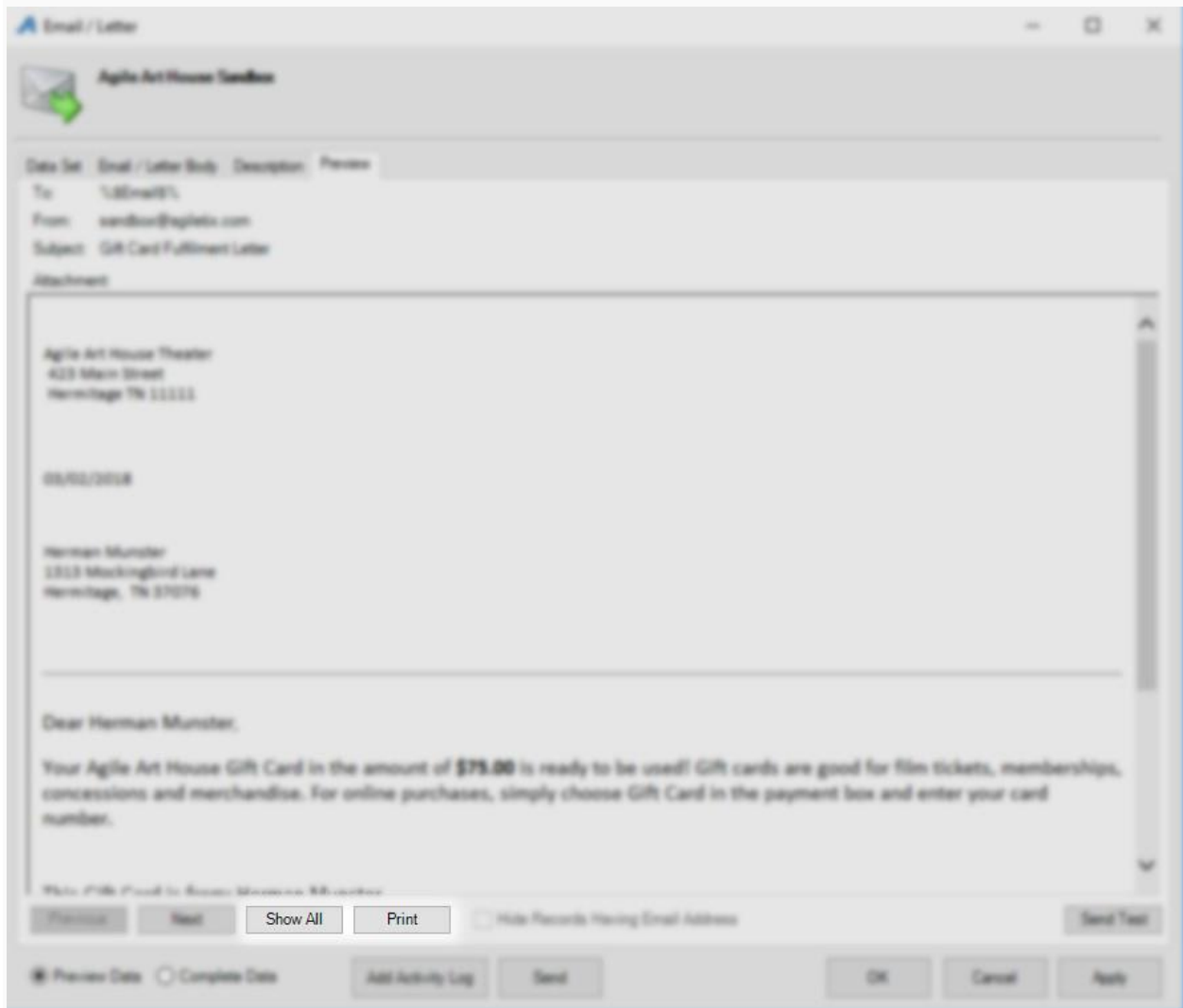
GiftCardName	Amount	FromFirstName	FromLastName	ToName	ShipAddress1	ShipAddress2	ShipCity	ShipState
Agile Art House Gift Card	75.00	Herman	Munster	Herman Munster	1313 Mockingbird Lane		Hermitage	TN
Agile Art House Gift Card	1,000.00	Harry	Potter	Harry Potter	4 Privet Dr.		LONDON	OH

At the bottom of the window, there are radio buttons for "Preview Data" (selected) and "Complete Data", along with buttons for "Add Activity Log", "Send", "OK", "Cancel", and "Apply".

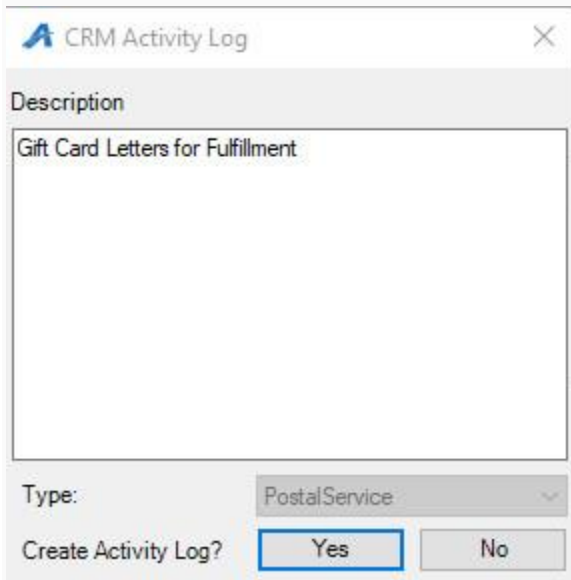
9. Click the Preview tab.

The screenshot shows the same "Email / Letter" window, but now the "Preview" tab is selected. The data set table is visible, showing the same two rows of data as in the previous screenshot.

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

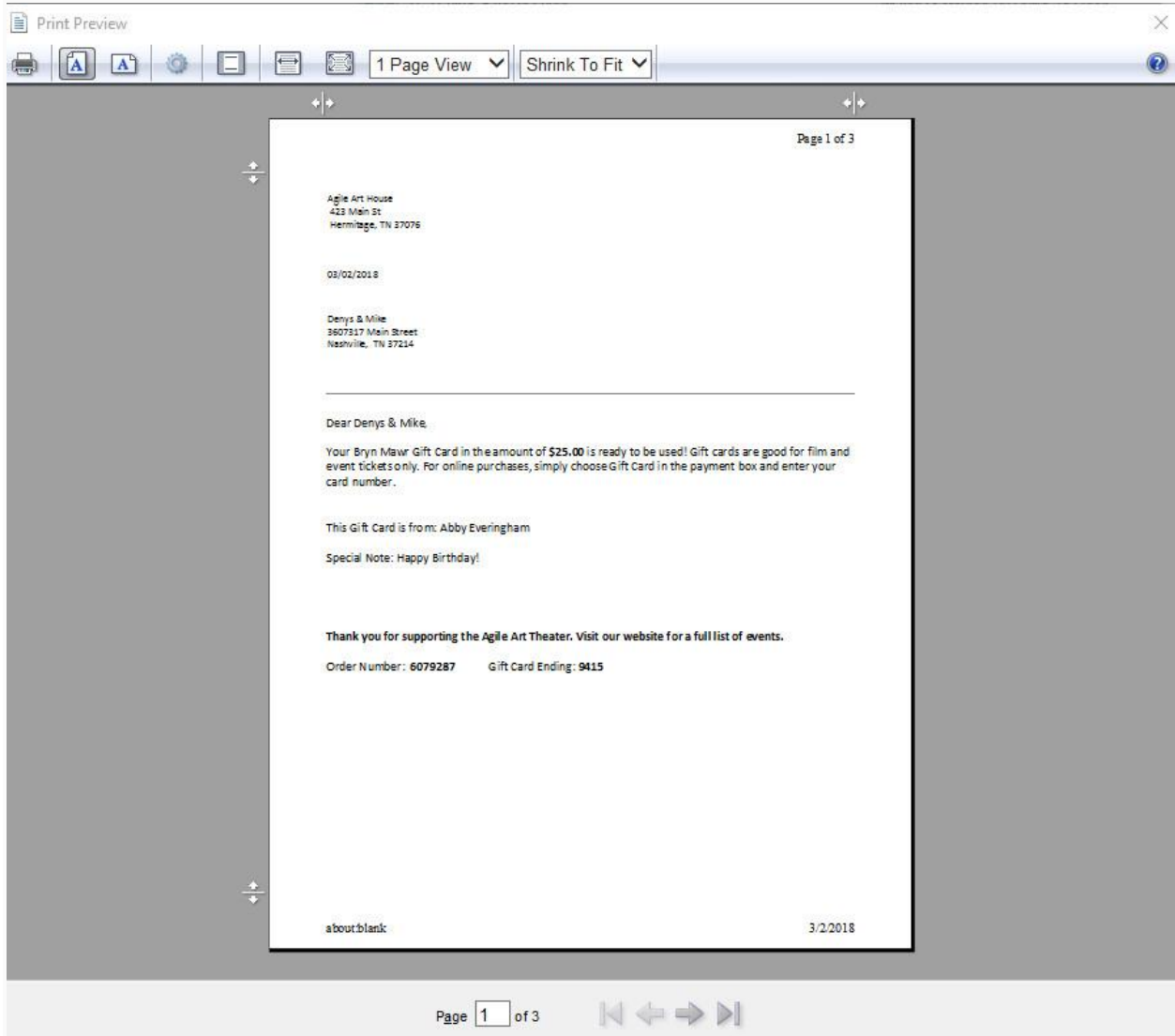


11. A CRM Activity Log window will appear. Click **Yes** so that the activity log will be saved for when you printed these letters.

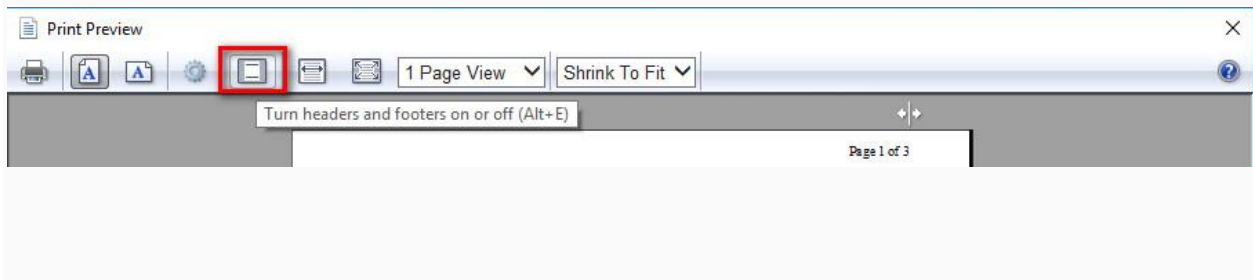


The image shows a dialog box titled "CRM Activity Log" with a close button (X) in the top right corner. Below the title bar is a section labeled "Description" containing a text area with the text "Gift Card Letters for Fulfillment". Below the text area is a "Type:" label followed by a dropdown menu showing "PostalService". At the bottom, there is a "Create Activity Log?" label followed by two buttons: "Yes" (highlighted with a blue border) and "No".

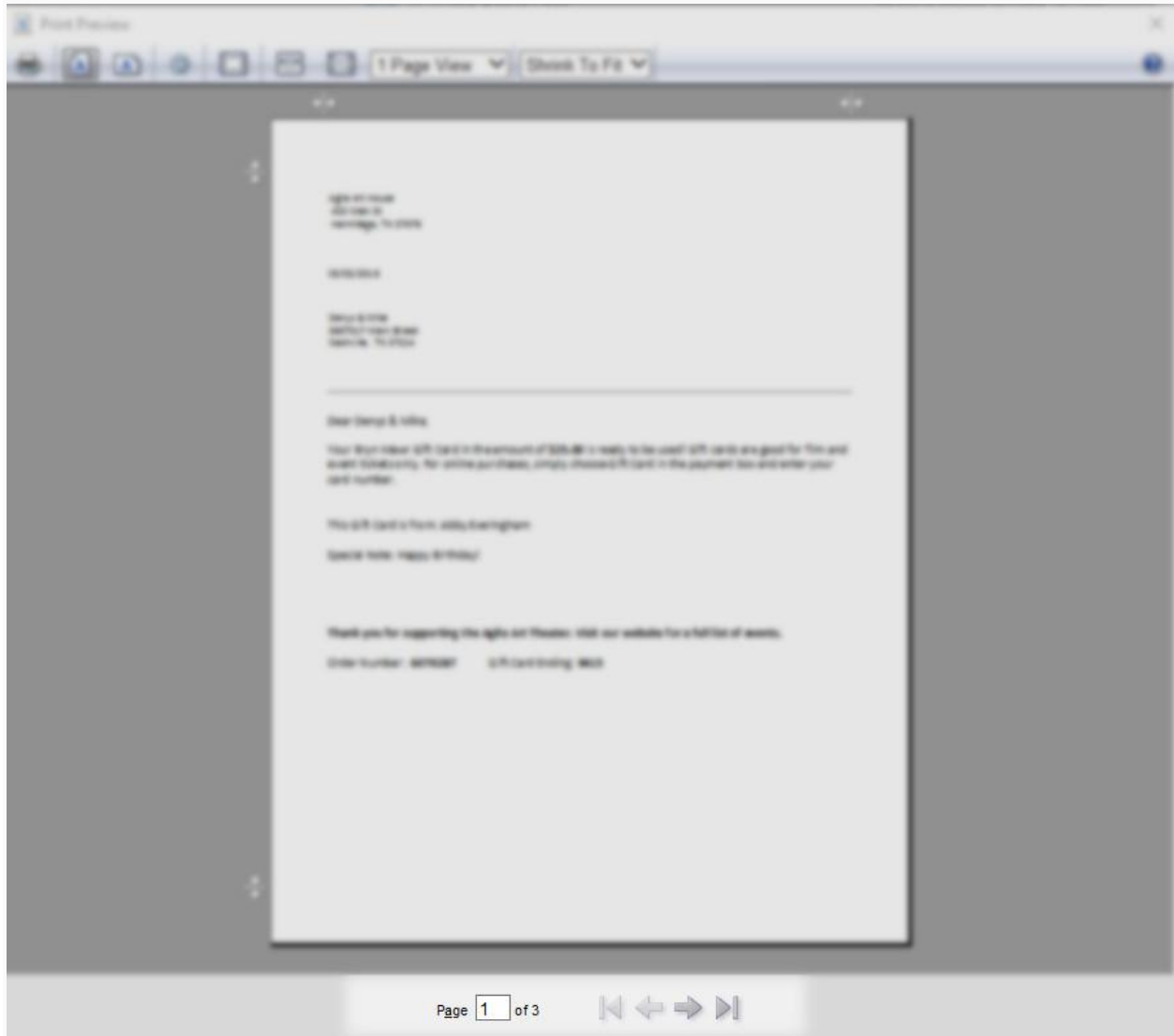
12. The Print Preview window will open.



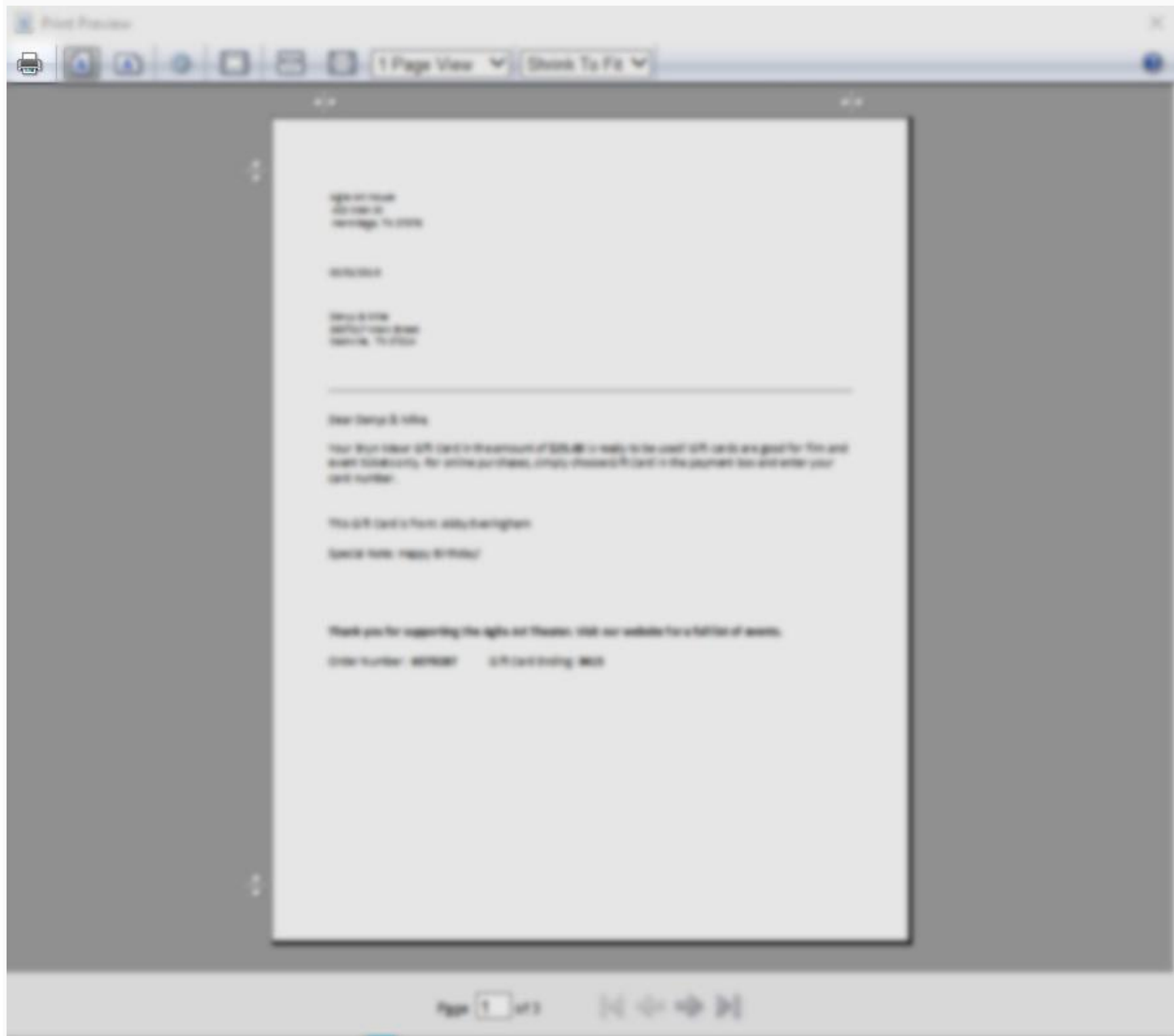
13. In the menu at the top of the screen, click the middle icon to turn the headers and footers off.



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



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



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