

Gift card – user scenario documentation

Prerequisites:

Installed Business Central ver. 19 cloud or higher.

Setting up the gift card module:

1. On the Business Central home page, click the Tell me

 Dynamics 365 Business Central	Q	Q	ø	?

2. Key in 'gift card setup' and choose Gift Card Setup

Tell r	ne what you want to do		2	×
gift	card setup			
Go	to Pages and Tasks			
>	Gift Card Setup	Administration		

3. Click as shown, to make changes to the gift card setup

	<u>}</u> <u>è</u> + î	
Gift Card Setup	Make changes on the page.	
New Actions Fewer options		
Notivate license status 🛛 🔂 Activate license	e 🔰 Activate trial lice se	,
General		
Bal. Account No.	Reason Code · · · · · · ·	
Default Bal. Gen. Bus	Genereal Journal Tem	
Default Bal. Gen. Prod	General Journal Batch	
Default date duration		
Number series		
Giftcard Nos.	Posted Giftcard Nos.	
License		
License status · · · · · · · Trial	Product Key	



4. Enter the mandatory fields as shown:

	Ø B	2 + 🖻	√ Saved	∎ ⊏ 2
Gift Card Set	Jp			
New Actions Fewer o	ptions			
😵 Update license status 🛛 🏚 /	Activate license 🛛 👖 Activ	ate trial license		於
General				
Bal. Account No 01010	~	Reason Code		\sim
Default Bal. Gen. Bus	ANDS \vee	Genereal Journal Tem	KASSE	\sim
Default Bal. Gen. Prod DIV	~	General Journal Batch	STANDARD	
Default date duration ••• 6M				
Number ceries				
Giftcard Nos.	~	Posted Giftcard Nos.	GC+	~
License				
liconse status		Product Key		

5. Activate the trial license, by clicking 'Activate trial license'.

		Ø Ē	+	Û		₫ /
Gift Card S	Setup					
New Actions	Fewer options					
😒 Update license status	🎰 Activate license	🏼 Activat	e trial license			×
General		1				
Bal. Account No.	01010		Reason Co	de · · · · · · · · ·		
Default Bal. Gen. Bus	INDENLANDS		Genereal J	lournal Tem	KASSE	
Default Bal. Gen. Prod	DIV		General Jo	ournal Batch	STANDARD	
Default date duration	6M					
Number series						
Giftcard Nos.	GC		Posted Gif	tcard Nos.	GC+	
License						
License status	Trial		Product K	ey · · · · · · · · · ·	6166f90b86810109000443	e1



6. Choose Yes to activate the trial license:

Do you wish to activate the trial licer	nse?
	Yes No

7. You should now see, that the field 'License status' and Product Key has been filled:

) @	+ Î	✓ Saved 📕 🖬
Gift Card Se	etup			
N Actions Fev	ver options			
Vpdate license status	🏚 Activate license	🛿 Activate t	rial license	
General				
Bal. Account No 01	010	\sim	Reason Code · · · · · ·	~
Default Bal. Gen. Bus	DENLANDS	\sim	Genereal Journal Tem	KASSE ~
Default Bal. Gen. Prod DI	V	\sim	General Journal Batch	STANDARD ····
Default date duration 6N	1			
Number series				
Giftcard Nos. · · · · · · GC	2	\sim	Posted Giftcard Nos.	GC+ ~
License				

- a. **If you don't get a trial license**, you need to allow the gift card extension Http-allowance.
 - i. Go to the menu Extension Management and find the Gift Card extension

meropore		200
AnaGo		Gif
Microsoft	Manage	Inte
Microsoft	📲 Install	Lat
Microsoft	😽 Uninstall	010
Microsoft		Pay
Microsoft		Pay
Microsoft	₽ Configure	Pay



ii. Make sure the field 'Allow HttpClient Request' has been set:

Extension Settings Gift Card	Ø	Ŕ	+	Î		√ Saved	c /
Group							
App ID	c2c7e457-0011-4812-824e-62	20f	Publisher		AnaGo		
Name	Gift Card		Allow Http	pClient Requ	•		

iii. Try to activate the Trial License again:

		Ø	Ŕ	+	Î		2
Gift Card S	Setup						
New Actions	Fewer options						
➡ Update license status	🎰 Activate license	e i A	ctivate ti	rial license			埝
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Default Bal. Gen. Bus	INDENLANDS		-۱	Genereal J	Journal Tem	KASSE	
Default Bal. Gen. Prod	DIV		- 1	General Jo	ournal Batch	STANDARD	
Default date duration	6M						



8. You should now have a setup similar to this:

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Gift Card S	Setup						
New Actions	Fewer options						
😼 Update license status	🏚 Activate license	e 🛿 🕴 Acti	vate t	rial license			Ŕ
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Bal. Account No.	01010			Reason Co	de · · · · · · · ·		
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Default date duration	6M						
Number series							
Giftcard Nos.	GC			Posted Gif	tcard Nos. · · ·	GC+	
License							
License status	Trial			Product Ke	еу · · · · · · · · ·	6166f90b86810109000443e1	



Using the gift card module:

r

After you have made the setup, you should now be ready to create your first gift card.

1. From the search bar, find the Gift Card List. Key in 'gift' and choose the 'Gift Card List':

Tell me what you want to do	2 X
gift	
Go to Pages and Tasks	Show all (50)
> Gift Card List Lis	ts

2. Choose 'New' to create a new gift card:

Gift Card List		
		┢ ७ ≣
No. † Giftcard name	Customer name	Amount Expiration date
	(There is nothing to show in this view)	

3. Key in the fields like shown to fill the gift card:

Gift Card		+ 🗉	✓ Saved 🔲 🖬 🦼
GC00005 · Gift card 1			
Tore options			
General		<u> </u>	Show more
No		Customer	
Giftcard name Gift card 1		Customer no	\sim
Starting date	Ē	Customer name Litware, Inc.	
Expiration date 5/7/2022		Customer address	en
Creation date 11/7/2021		Customer post code US-FL 37125	~
Created by INFO		Customer city	
Posting date 11/7/2021	Ē		
Trade and amounts			
Amount · · · · · · · · · · · · · · · · · · ·	100.00	Currency Code	~
Posting Details			
Bal. Gen. Bus. Posting Group	~	Bal. Gen. Prod. Posting Group	~
5 .			



4. To post the gift card, choose 'Post Gift Card..' from the menu:

Gift Card		+ 🖻	aved 🗍 🗖 🦯
GC00005 · Gift card 1	_		
Post Gift Card More options			
General			Show more
No		Customer	
Giftcard name		Customer no	\sim
Starting date		Customer name · · · · · · Litware, Inc.	
Expiration date		Customer address	
Creation date		Customer post code US-FL 37125	\sim
Created by · · · · · · · · · · · · · · · · INFO		Customer city · · · · · · · · · · · · · · · · · · ·	
Posting date	ti i		
Trade and amounts			
Amount	100.00	Currency Code	~
Posting Details			
Bal. Gen. Bus. Posting Group INDENLANDS	~	Bal. Gen. Prod. Posting Group	~

5. Choose 'Yes' to post the gift card:

?	Do you want to post the gift card.		
		Yes	No

6. After posting, you will get a message showing the number of the posted gift card:

(i)	Gift card GC00005 has been posted to posted gift card PGC00004.
	ОК



7. Find the posted gift card from the 'Tell me' menu:

 Dynamics 365 Business Central	Q	Û	-	?

8. Key in 'posted gift card' and choose 'Posted Gift Card List':

Tell me what you want to do		2 ×
posted gift		2
 Posted Gift Card List 	Lists	

9. You now see the posted gift card:

Oynamics 365	Business Cent	ral							Sandbox	Q	Q	ø	
ONUS Dar	nmark A/S	Sales ~ Poste	d Documents ~ Adminis	tration :	Sales/Purchase – Analy	/sis∨ ≡							
ntacts portunities es Quotes	Sales Orders Customers Items	Active Segments Logged Segments Campaigns	Cases - Dynamitomer S Sales Ordersics 365 Sa Salespersons	ervice Iles	Extension Management Posted Gift Card Posted Gift Card List	Gift Card List Gift Card Setup							焓
ted Gift Card Li	st: All 🗸	\wp Search $+$ New	/ 📋 Delete 🛛 🐯 Edit List	Proces	ss \lor Report \lor Entry \lor	Actions \lor	Fewer options			Ŀ	\geq	; ≣	7 ⁴
. ↑	Gift	card name	Cus	tomer nam	ne		Amount	Redeemed	Expiration date		Posting di	ate	
GC00004	Gif	t card 1	Litv	vare, Inc.			100.00		5/7/2022		11/7/20	21	
	Aynamics 365 CONUS Dar ntacts portunities es Quotes ted Gift Card Li .1 .2 .2 .2 .2 .2 .2 .2 .2 .2 .2 .2 .2 .2	Constant Section 2012 Section 2013 Section	Approximatics 365 Business Central RONUS Danmark A/S Sales \rightarrow Postee stacts Sales Orders Active Segments portunities Customers Logged Segments es Quotes Items Campaigns ted Gift Card List: All \rightarrow \rightarrow Search .1 Giftcard name .200004 E Gift card 1	XONUS Danmark A/S Sales ∨ Posted Documents ∨ Administrators Sales Orders Active Segments Cases - Dynamitomer Stales Ordersics 365 Sales Quotes Items Campaigns Sales Ordersics 365 Sales Persons ted Gift Card List: All ∨ .1 Giftcard name Cus .2 Giftcard name Cus	XONUS Danmark A/S Sales Posted Documents Administration ntacts Sales Orders Active Segments Cases - Dynamitomer Service portunities Customers Logged Segments Sales Ordersics 365 Sales es Quotes Items Campaigns Salespersons ted Gift Card List: All <	XONUS Danmark A/S Sales → Posted Documents → Administration Sales/Purchase → Analy ntacts Sales Orders Active Segments Cases - Dynamitomer Service Extension Management portunities Customers Logged Segments Sales Ordersics 365 Sales Posted Gift Card es Quotes Items Campaigns Salespersons Posted Gift Card List ted Gift Card List: All → P Search + New Delete Edit List Process → Report → Entry → .1 Giftcard name Customer name Custom	XONUS Danmark A/S Sales → Posted Documents → Administration Sales/Purchase → Analysis → ≡ ntacts Sales Orders Active Segments Cases - Dynamitomer Service Extension Management Gift Card List portunities Customers Logged Segments Sales Ordersics 365 Sales Posted Gift Card Gift Card Setup es Quotes Items Campaigns Salespersons Posted Gift Card List ted Gift Card List: All →	Arrow Sales Posted Documents Administration Sales/Purchase Analysis Image: Carrow of the second s	XONUS Danmark A/S Sales > Posted Documents > Administration Sales/Purchase > Analysis > = = ttacts Sales Orders Active Segments Cases - Dynamitomer Service Extension Management Gift Card List portunities Customers Logged Segments Cases - Dynamitomer Service Extension Management Gift Card List es Quotes Items Campaigns Sales Ordersics 365 Sales Posted Gift Card Gift Card Setup es Quotes Items Q Search New Delete Edit List Process > Report > Entry > Actions > Fewer options ct Giftcard name Customer name Amount Redeemed ct00004 E Gift card 1 Litware, Inc. 100.00	Add State Sales Soles Sales Posted Documents Administration Sales Sales	Addbus Sandbus KONUSD Danmark A/S Sales Sales Orders Active Segments Customers Cases - Dynamitomer Service Extension Management Gift Card List Customers Logged Segments Sales Orders Active Segments Sales Orders Cases - Dynamitomer Service Extension Management Gift Card List Customers Logged Segments Sales Orders Sales Orders Campaigns Sales Orders Sales Posted Gift Card Gift Card Setup Posted Gift Card List All > All > Posted Filt List Posted Gift Card List All > All > Posted Filt List Posted Gift Card List Actions > Fewer options <td>Andbox P Q KONUSD Danmark A/S Sales Posted Documents Administration Sales/Purchase Analysis ≡ ttacts Sales Orders Active Segments Cases - Dynamitomer Service Extension Management Gift Card List portunities Customers Logged Segments Cases - Dynamitomer Service Extension Management Gift Card List se Quotes Items Campaigns Sales Ordersics 365 Sales Posted Gift Card Gift Card Setup es Quotes Items Campaigns Sales Ordersics 365 Sales Posted Gift Card List Gift Card Setup ted Gift Card List All ~ P Search New Delete Extension name ct Giftcard name Customer name Customer name Amount Redeemed Expiration date Posting d ct00004 E Gift card 1 Litware, Inc. 100.00 5/7/2022 11/7/20</td> <td>Addition Sandbox P Q</td>	Andbox P Q KONUSD Danmark A/S Sales Posted Documents Administration Sales/Purchase Analysis ≡ ttacts Sales Orders Active Segments Cases - Dynamitomer Service Extension Management Gift Card List portunities Customers Logged Segments Cases - Dynamitomer Service Extension Management Gift Card List se Quotes Items Campaigns Sales Ordersics 365 Sales Posted Gift Card Gift Card Setup es Quotes Items Campaigns Sales Ordersics 365 Sales Posted Gift Card List Gift Card Setup ted Gift Card List All ~ P Search New Delete Extension name ct Giftcard name Customer name Customer name Amount Redeemed Expiration date Posting d ct00004 E Gift card 1 Litware, Inc. 100.00 5/7/2022 11/7/20	Addition Sandbox P Q

10. Redeem the gift card by chose 'Redeem Gift Card' from the menu:

CRONUS Da	nmark A/S	Sales∨ Poste	d Documents ~ Administration	Sales/Purchase ~ Anal	vsis∨ ≡					
Contacts Opportunities Sales Quotes	Sales Orders Customers Items	Active Segments Logged Segments Campaigns	Cases - Dynamitomer Service Sales Ordersics 365 Sales Salespersons	Extension Management Posted Gift Card Posted Gift Card List	Gift Card List Gift Card Setup					Ŕ
Posted Gift Card	List: All 🗸	ho Search + Nev	v 📋 Delete 🐺 Edit List 🛛 Proce	ess V Report V Entry V	Actions \lor	Fewer options			\$ 7 = ,	۲ 📕
No. T	Gif	tcard name	customer na	edeem Gift Card me		Amount	Redeemed	Expiration date	Posting date	
PGC00004	Git	ft card 1	Litware, Inc	1.		100.00		5/7/2022	11/7/2021	



11. Choose 'Yes' to redeem the posted gift card:

?	Do you want to redeem gift card PG	C00004.	
		Yes	No

12. You will get a message saying that Business Central has redeemed the posted gift card:

(j)	Posted gift card PGC00004 has been redeemed.	
		ОК