



DYNAMICS 365 COMMERCE INTERNAL GIFT CARDS OVERVIEW

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Agenda

Overview

Gift Card Possible Scenarios

Configuration/Setup

GL Posting

Intercompany Gift Cards

Demo

Q&A

Overview

A gift card is a **prepaid debit card** that contains a specific amount of money available for use for a variety of purchases.

Microsoft Dynamics 365 Commerce supports both **internal and external gift cards**. Internal gift cards are managed entirely in Dynamics 365 Commerce, whereas external gift cards are administered by a third party.

For External gift card setup: [Support for external gift cards - Commerce | Dynamics 365 | Microsoft Docs](#)



Gift Card Prerequisites

Feature Enablement

- Omni-channel payments
- Omni-channel Commerce order payments
- Purchasing gift card on e-Commerce feature
- Unified payment posting journal defaults for Commerce: [Note: Before enabling this feature, ensure you have configured a default Journal name in Commerce or Call Center parameters forms for both payments and refunds.]
- Enable duplicate payment protection on invoicing
- Enable manual void of expired credit card payment lines when authorizations are expired

Gift Card Scenario Supported by Different Channels

Scenario	E-Commerce	Point-of-Sale	Call center
Sell electronic	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Sell physical	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Redeem electronic/physical	* <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Check balance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Add balance		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Void			<input checked="" type="checkbox"/>
Cash out		<input checked="" type="checkbox"/>	

Product Configuration

- Product master service item with variants
- Commerce Tab
 - Blocked at register
 - Discounts turned off
 - Style group – display order
- Trade Agreements
- Item Group

Released product details
9996 : Gift Card

General

IDENTIFICATION	Product service type Not specified	FURTHER IDENTIFICATION	Search name GiftCard2	ADMINISTRATION	Item model group GT
Product type Service	Item number 9996	Product name Gift Card	Description	Storage dimension group SiteWH	Reservation hierarchy
Product subtype Product master	Product number 9996			Tracking dimension group None	

Commerce

VARIANT	BAR CODE	PRODUCT LIFE CYCLE
Color group	Bar code setup	Season
Size group	Bar code	Valid from
Style group GC	ACTIVATION	Valid to
Print variants shelf labels <input type="radio"/> No	Issue date	POS REGISTERS
COMPARISON PRICE		Scale product <input type="radio"/> No
Base comparison unit		Key in price Not mandatory
Comparison price 0.00		Key in quantity Not mandatory
BLOCKING		Must key in comment <input type="radio"/> No
Blocked at register <input checked="" type="radio"/> Yes		Zero price valid <input type="radio"/> No
Date blocked 10/5/2021		Quantity becomes negative <input type="radio"/> No
Date to be blocked		Prevent all discounts <input checked="" type="radio"/> Yes
		Prevent manual discounts <input checked="" type="radio"/> Yes
		Prevent retail discounts <input checked="" type="radio"/> Yes
		Prevent tender based discounts <input checked="" type="radio"/> Yes

Released product variants | 9996 : GIFTCARD

Filter

Product number	Product name	Search name	Style	Total weight	Product lifecycle state
9996 : : : 100E	Gift Card	GiftCard	100E	1	
9996 : : : 100P	Gift Card	GiftCard	100P	1	
9996 : : : 25E	Gift Card	GiftCard	25E	1	
9996 : : : 25P	Gift Card	GiftCard	25P	1	
9996 : : : 50E	Gift Card	GiftCard	50E	1	
9996 : : : 50P	Gift Card	GiftCard	50P	1	

View trade agreements | 9996 : GIFTCARD2

Filter

Relation	Currency	Product c...	Item	Style	Unit	T...	F...	To	Amount in tran...	Price unit
Price (sales)	USD	Table	9996	100E	ea		0...		100.00	1.00
Price (sales)	USD	Table	9996	100P	ea		0...		100.00	1.00
Price (sales)	USD	Table	9996	25E	ea		0...		25.00	1.00
Price (sales)	USD	Table	9996	25P	ea		0...		25.00	1.00
Price (sales)	USD	Table	9996	50E	ea		0...		50.00	1.00
Price (sales)	USD	Table	9996	50P	ea		0...		50.00	1.00

Setup/Configuration

- Add new line for :
 - Start/End Date
 - Gift Card number
- Gift card product
- Gift card company
- Journal
- Void journal name
- Allow concluding gift card transactions in offline mode
- Electronic mode of delivery is to set

Commerce parameters

General | **Set up the retail parameters for posting**

Posting

Periodic discounts

Post periodic discount: Yes

Ledger account type: Periodic

Discount: 403200

Quantity discount: 403210

Mix and match number: 403220

Threshold discount number:

Post infocode discount: No

Post periodic discount for orders: No

Gift card

+ New | Delete

Start date	End date	Gift card number
1/1/2015		GC#####

Gift card product: 9996

Tax on gift cards: No

transactions to print: 0

Gift card company: USRT

Journal: WriteOff

Void journal name: WriteOff

Allow concluding gift card transacti...: Yes

Commerce parameters

General | **Set up the retail parameters for customer orders**

Posting

Customer orders

Order

Default order type: Sales order

Days quotation expires: 30

Process return orders as sales orders: No

Enable returns for multiple orders: No

Default deposit percentage: 10.00

Disposition code: 71

MODE OF DELIVERY

Pickup mode of delivery: 60

Carry Out mode of delivery: 70

Charges

Cancellation charge percentage: 5.00

Shipping charge code: FREIGHT

Cancellation charge code: Cancel

Electronic mode of delivery

Electronic mode of delivery: 12

Use default batch id when batch nu...: Yes

Hold code for order synchronizati...:

Mode of deli...	Description	Carrier company	Carrier ID
10	Truck		
11	Ground		
12	Electronic		
20	Air		
21	Next day air		
26	Standard overnight		
30	Rail		

Setup/Configuration

- Retail and commerce > Channel setup > Modes of delivery
 - Create/Select the **Electronic** mode of delivery in the list pane, and then add the digital gift card product to the grid on the Products

Finance and Operations

Modes of delivery

Mode of delivery	Description	Charges group	Expedite
12	Electronic		

Retail channels

Add line Remove

Name	Party ID
Fabrikam call center	000001741
Adventure Works	000002480
<input checked="" type="checkbox"/> Fabrikam online store	000001568
Fabrikam extended online store	000002231

Products

+ Add line + Add products Remove

Category	Product	Product variant	Name	Line type
<input checked="" type="checkbox"/>	9996	9996 : : : 100E	Gift Card	Include
	9996	9996 : : : 25E	Gift Card	Include
	9996	9996 : : : 50E	Gift Card	Include

Finance and Operations

Modes of delivery

Mode of delivery	Description	Charges group	Expedite
99	Standard	01	

Retail channels

Add line Remove

Name	Party ID
<input checked="" type="checkbox"/> Electronics	000000355
Sporting	000000356
Fashion	000001569
San Francisco	000002230
Fabrikam extended online store	000002231
Fashion call center	000002255
San Jose	000002280

Products

+ Add line + Add products Remove

Category	Product	Product variant	Name	Line type
<input checked="" type="checkbox"/>	ALL			Include
	Gift Cards	9996 : : : 25E	Gift Card	Exclude
	Gift Cards	9996 : : : 50E	Gift Card	Exclude
	Gift Cards	9996 : : : 100E	Gift Card	Exclude

Channel Configuration

Add gift card product to :

- Commerce product hierarchy
- ECommerce
 - Channel navigation hierarchy
 - Assortments

Commerce product hierarchy

General

Name: Gift Cards Commodity code: _____ Active: Yes

Products

+ Add + Add products Remove

✓	Product number	Product name	Display or... ↑
	9997	Gift Card	0.00
	9996	Gift Card	0.00

Retail product properties

Commerce product hierarchy | FASHION NAVIGATION HIERARCHY

General

Name: Gift Card Commodity code: _____ Active: Yes

Products

+ Add + Add products Remove

✓	Product number	Product name	Display or... ↑
	9996	Gift Card	0.00

Product attribute groups

Channel Configuration

- Once the gift card is set-up, the commerce channels must be configured to accept gift cards as a payment method

[Edit](#) [+ New](#) [Delete](#) Configuration status | Channel **Set up** Options [🔍](#)

Attribute groups
 Channel attributes
 Sales order attributes

Set up
 Modes of delivery
 Payment methods
 Fulfillment group assignment
 Channel database

Online store

✓ Retail Chann...	Name	Channel type	Operating unit number	Legal entity
000032	AW online store	Online store	067	usrt
000033	Contoso online store	Online store	068	usrt
000037	Fabrikam online store	Online store	077	usrt
000137	Fabrikam extended online store	Online store	128	usrt
000210	Adventure Works	Online store	202	USRT

[Edit](#) [+ New](#) [Delete](#) Electronic payment setup Currencies Options [🔍](#)

Payment methods | ONLINE STORE : FABRIKAM ONLINE STORE

Payment method	Payment method name	Function
8	Gift Card	Card

General

IDENTIFICATION	COMMERCE
Terms of payment	Operation name Pay gift card
	Connector name

Posting

ACCOUNT	Account type	Account number	DIFFERENCE ACCOUNT
Ledger account	Ledger account		Difference account 618150
Account number 112140	Account number		Account name Cash Discrepancies
GIFT CARD ACCOUNT	Gift card item number 9999		Maximum difference amount 0.00
Company USRT			

Cash Out Gift Card - POS

- Select store > Setup > Payment methods
- Enter the gift cash out threshold
- Allow overtender

Doc article :

[Cash out gift card balance for a retail customer - Commerce | Dynamics 365 | Microsoft Docs](#)

The screenshot shows the 'Payment methods' setup for 'HOUSTON : HOUSTON'. The 'Gift Cardsss' method is selected. The 'CASH OUT GIFT CARD' field is highlighted with a red box, indicating the gift card cash out threshold is set to 110.00. Other visible fields include 'Allow overtender' (Yes), 'Overtender maximum amount' (0.00), and 'Gift card cash out threshold' (110.00).

Field	Value
Allow overtender	Yes
Overtender maximum amount	0.00
Gift card cash out threshold	110.00

Gift Card Transactions

➤ All gift card transactions get logged here

Finance and Operations all gift cards

+ New Delete Unlock Void Options

Filter

Gift card number ↑	Balance	Currency	Channel
4565	25.00	USD	
56585	500.00	USD	Houston
5757	200.00	USD	Houston
750923842	100.00	USD	
7777	52.20	USD	
7847	250.00	USD	
787878	100.00	USD	
7898896	500.00	USD	
8898	500.00	USD	Houston
89853	50.00	USD	Houston
898888	900.00	USD	Houston
8989	50.00	USD	
898989	1,000.00	USD	
9898	200.00	USD	
989898	1,000.00	USD	Houston
9997	50.00	USD	
GC0020989259	29.16	USD	
GC0355920537	100.00	USD	
GC1111111111	333.30	USD	
GC124545454	462.81	USD	
GC1400104157	0.00	USD	
GC1820273057	20.31	USD	
GC2677180819	0.00	USD	
GC2695256633	100.00	USD	
GC4444	502.19	USD	
GC5555	555.00	USD	
GC6229442145	25.00	USD	
GC8472518126	54.77	USD	

Gift cards

Gift card number	Balance	Currency
GC0020989259	29.16	USD

Blocked

Locked No

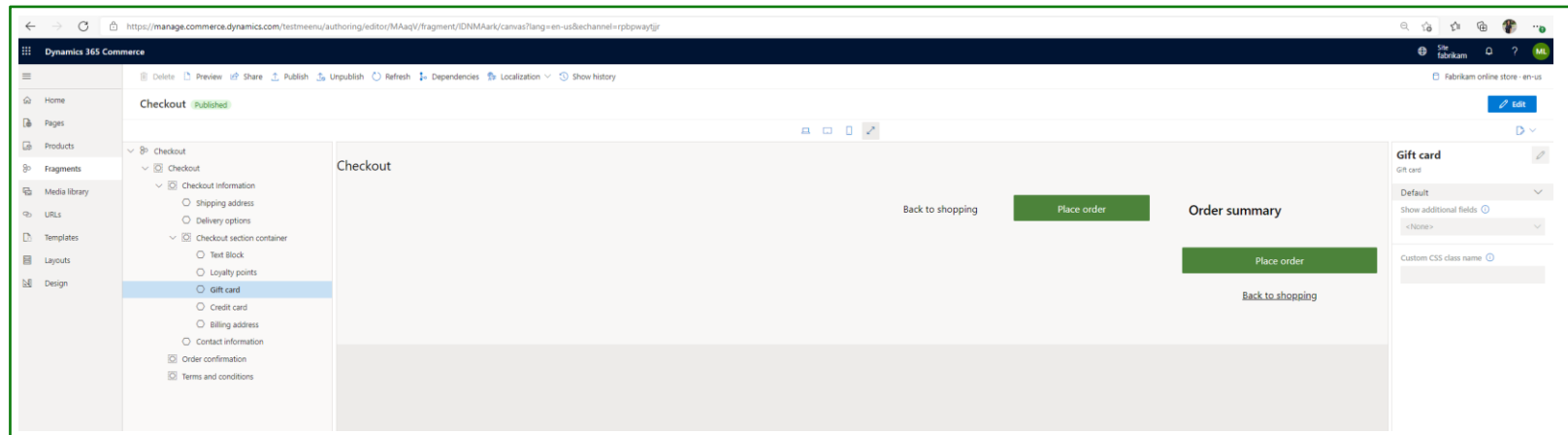
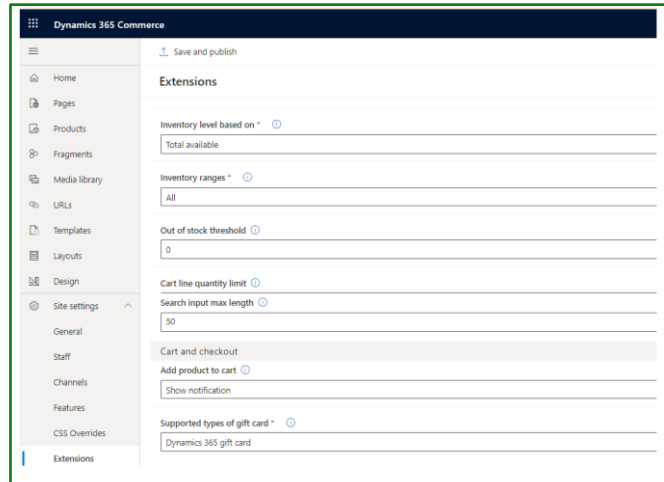
Name	Register number

History

✓ Name	Regist...	Transactio...	Operator ...	Date	Transactio...	Amount	Operation	Created by
Fabrikam online st...				10/6/2021	06:27:06 ...	100.00	Issue	Admin
Fabrikam online st...	~vc76h...	004071		10/25/2021	07:15:05 ...	-70.84	Redeem	RetailServiceAccount

E-Comm site settings

- Supported types of gift card
- Checkout fragment



Email setup and template

- Commerce Parameters > Commerce email notification profile
- Setup email template

Filter

ENProfile
Event notification profile
Yes

Email notification profiles

Email notification profile	Description	Active
ENProfile	Event notification profile	<input checked="" type="checkbox"/> Yes

Retail event notification settings

+ New Delete Configure modes of delivery

✓ Email notification type	Email ID	Active
Order created	NewOrder	✓
Order confirmed	CnfmOrder	✓
Picking completed	PickOrder	✓
Packing completed	PackOrder	✓
Order shipped	ShipOrder	✓
Payment failed	PmtFailur	✓
✓ Issue gift card	GiftCard	✓
B2B prospect approved	b2bapprov	✓
Order invoiced	ShipOrder	✓

A gift card is waiting for you!

Greetings! Here is your gift card for shopping at Fabrikam.com. We hope you enjoy your shopping experience, and the fabulous clothing and apparel that you'll only find at Fabrikam.

Shop at Fabrikam.com

Gift card number
GC2695256633

Amount
\$100

From

Message
Happy Demo!

Additional Questions?
View our [help pages](#)
Read our [return policy](#)

Share your enthusiasm and join our team. [View all careers](#) at the Fabrikam retail store.

Fabrikam respects your privacy. Please view our online [Privacy Statement](#). To set your contact preferences for other Fabrikam communications, see the communications preferences section of the [Fabrikam Privacy Statement](#).

Fabrikam Corporation, One Fabrikam Way, Redmond, WA, 98052, USA

Save + New Delete Email message Options

Organization email templates

Email ID	Email description	Sender name	Sender email
GiftCard	Issue gift card e-mail	Order Admin	mbsuser2@microsoft.com

General

Default language code:

Priority: Normal

Batch group:

Email message content

+ New Delete Edit

✓ Language	Subject	Has body
en-us	You have a new gift card	<input checked="" type="checkbox"/>

Upload email template

Specify email template by uploading appropriate HTML content

Upload email template

Upload Cancel

HTML body of the email message.

Fabrikam Online logo

A gift card is waiting for you!

Greetings! Here is your gift card for shopping at Fabrikam.cc your shopping experience, and the fabulous clothing and ap find at Fabrikam.

Shop at Fabrikam.com

Integration with Financials

- Outstanding gift cards are a liability
- Sales and Payments typically post to the same liability account
- Sale account set up
Released product > Item group > Sales order > Revenue
- Payment account set up
Retail store > Payment methods > Gift card payment method >
Posting > Account number

Item groups

Item group	Name
GiftCard	GiftCard

Sales order

Account type	Main account
Cost of units, delivered	
Cost of goods sold, delivered	
Cost of units, invoiced	
Cost of goods sold, invoiced	500100
Revenue	222190
Discount	403200
Commission	

Segment	Value	Name
MainAccount	222190	Other Current Liabilities

Purchase order

Inventory

Payment methods | HOUSTON : HOUSTON

Payment method	Payment method name	Function
8	Gift Cardsss	Card

General

Amount

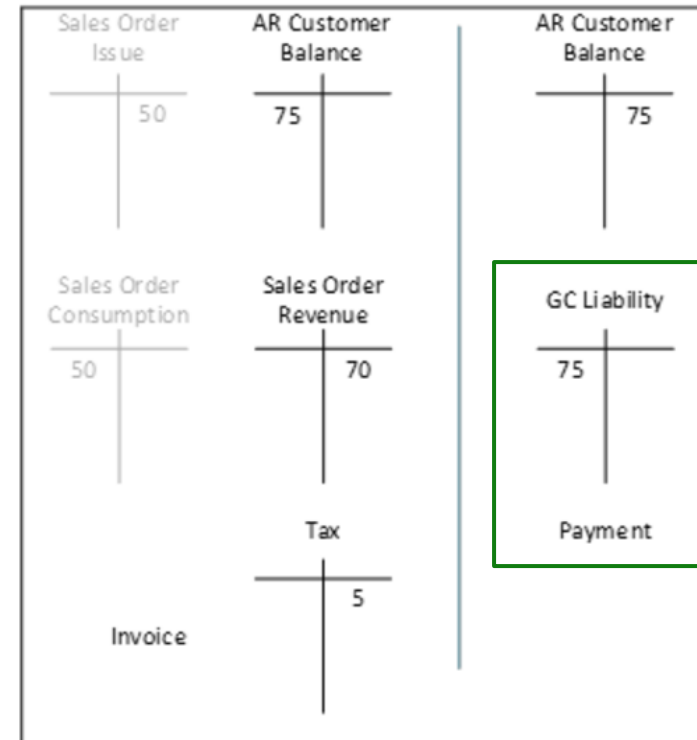
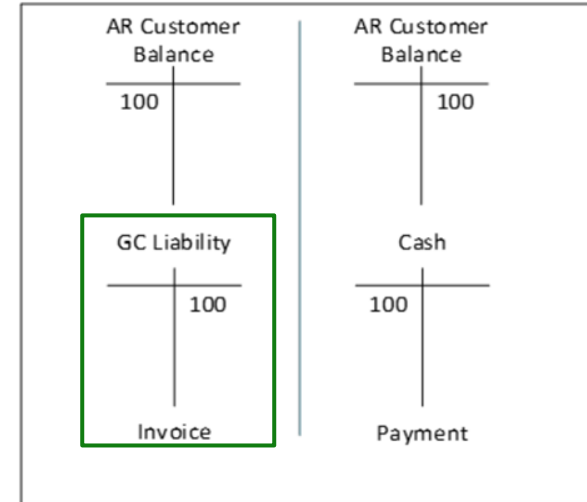
Posting

ACCOUNT	Account number	Maximum difference amount
Account type Ledger account		0.00
Account number 222190	Gift card item number 9999	Big difference account 618140
GIFT CARD ACCOUNT	DIFFERENCE ACCOUNT	Account name Bid Difference
Company USRT	Difference account 618150	TENDER DECLARATION OPTIONS
Account type Ledger account	Account name Cash Discrepancies	Compress payment entries <input type="radio"/> No

Integration with Financials

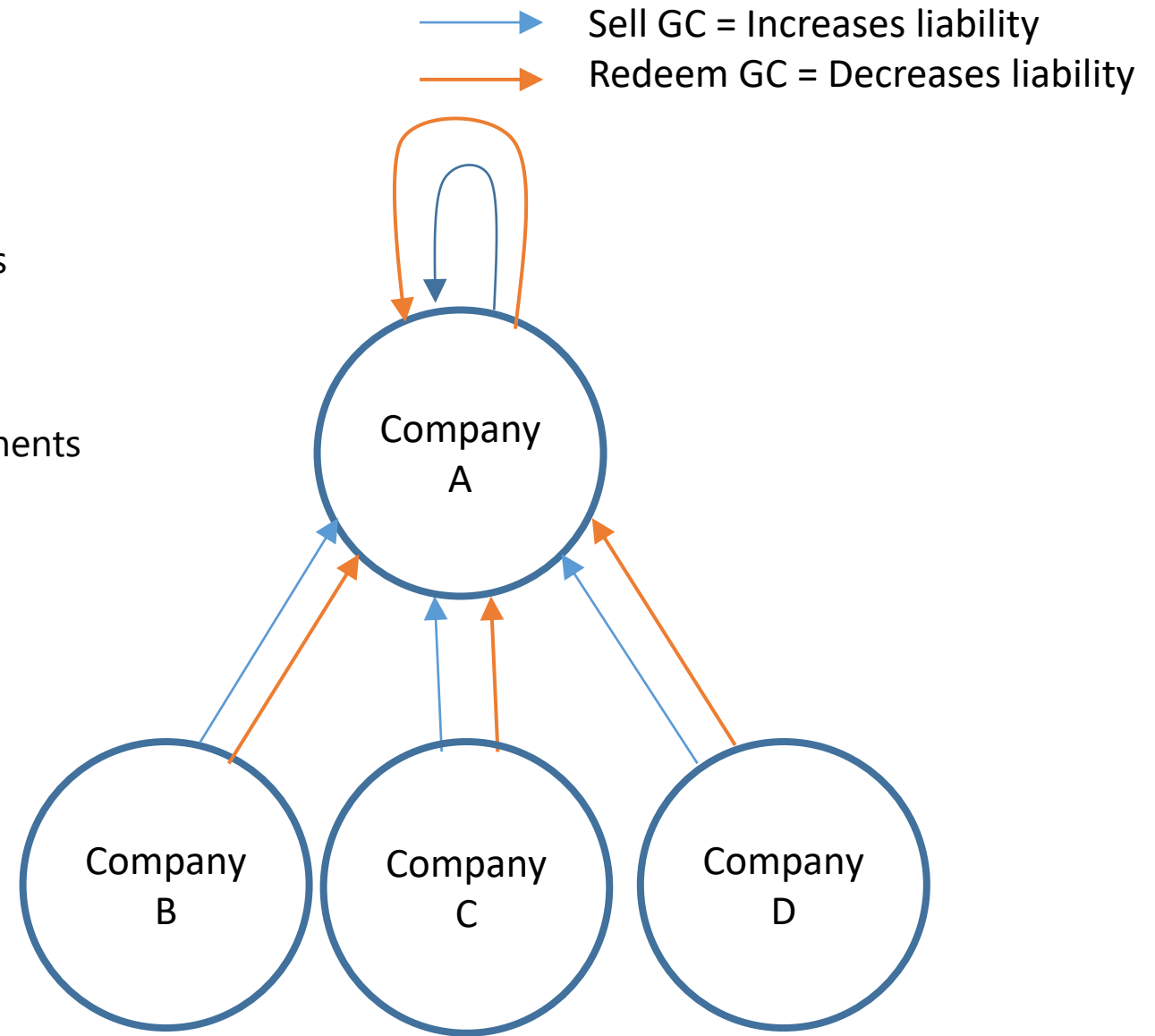
- Sales of gift cards credit the liability account
- Payments with gift cards debit the liability account

- Example
- \$100 gift card is sold
- \$75 purchase using the gift card



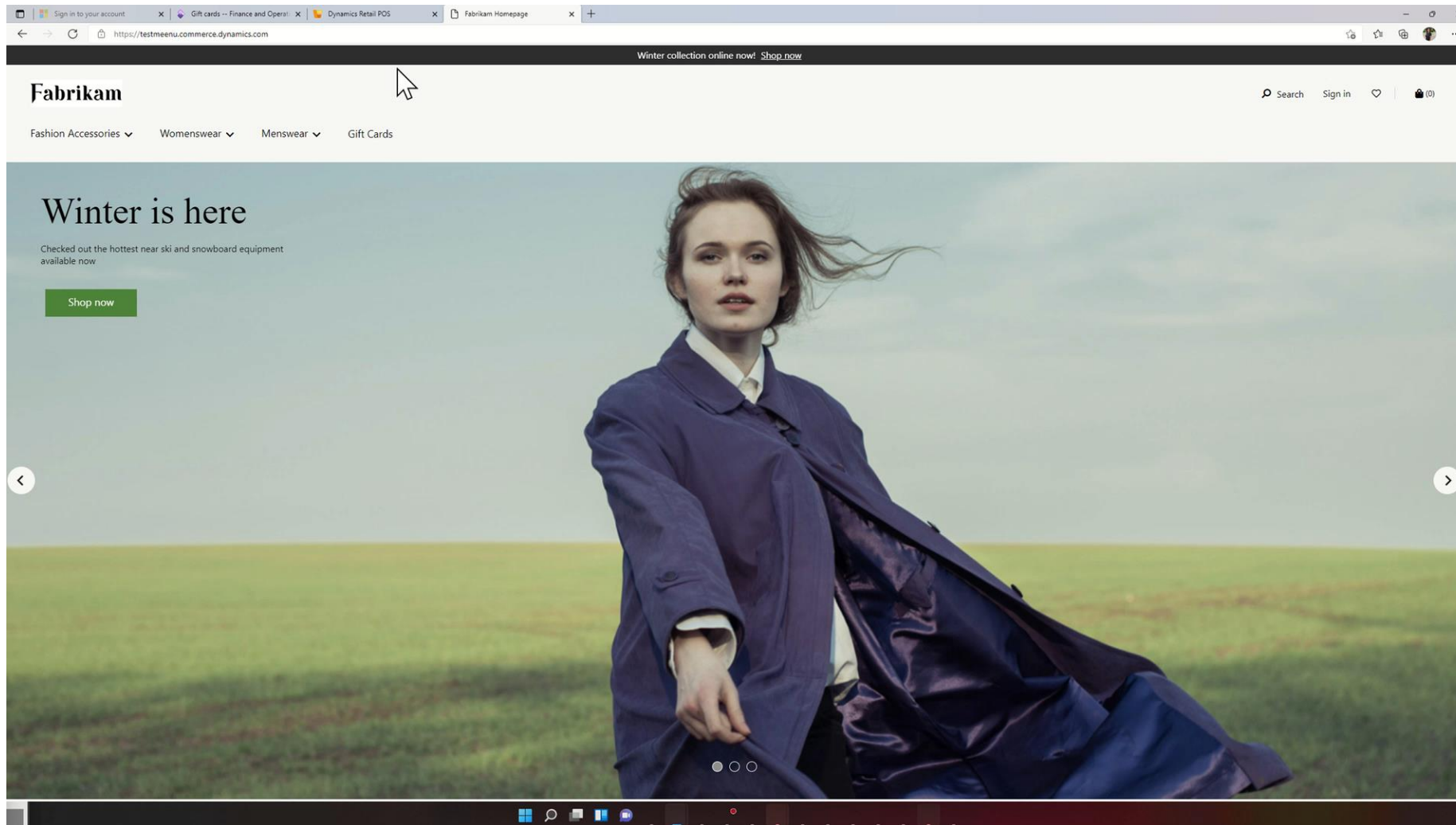
Cross-company Gift Cards

- Parent company model only
- Company A holds the liability for outstanding gift cards balances
 - Companies can share gift cards or process gift cards independently
 - Other companies transfer gift card liabilities and payments during retail statement posting
- Gift cards are created in Company A
 - Gift card transactions are recorded in company A



Demo

Scenario 1: Buy electronic gift card at E-comm and use at POS



Demo

Scenario 2: Fulfill and buy gift cards in Call Center

The screenshot displays the Microsoft Dynamics 365 Finance and Operations user interface. At the top, the browser address bar shows the URL: <https://d365commerce.sandbox.operations.dynamics.com/?cmp=USRT&mi=DefaultDashboard>. The page title is "Contoso Retail USA".

The main content area features a navigation pane on the left with a calendar for November 2021. The calendar shows the 15th as the current date. Below the calendar, there is a section titled "Work items assigned to me" with a sub-note: "Work items will be displayed here after they are assigned to you."

The central part of the dashboard is a grid of 25 functional area tiles, each with an icon and a label:

- Bank management
- Cost analysis
- Financial analysis - current company
- Personnel management
- Retail and Commerce IT
- Benefits
- Cost control
- Financial period close
- Pricing and discount management
- Sales order processing and inquiry
- Budget planning
- Customer credit and collections
- Fixed asset management
- Product readiness for discrete manufacturing
- Sales return processing
- Business processes for human resources
- Customer invoicing
- General journal processing
- Product readiness for process manufacturing
- Store financials
- Business processes for payroll
- Customer payments
- Invoicing
- Product variant model definition
- Store management
- Cash overview - all companies
- Data management
- Ledger budgets and forecasts
- Production floor management
- System administration
- Cash overview - current
- Data validation checklist
- Maintenance request
- Project management
- Vendor bidding

The Windows taskbar is visible at the bottom of the screen, showing various application icons.

Demo

Scenario 3 : Buy Gift Card at POS and use it as POS


The screenshot displays the Dynamics Retail POS interface. At the top, there are browser tabs for 'Gift cards -- Finance and Operat...', 'Gift cards -- Finance and Operat...', and 'Dynamics Retail POS'. The address bar shows 'https://d365commercepos.sandbox.operations.dynamics.com'. The user is identified as 'Emma Harris' with '3 - HOUSTON-20'.

The main interface is divided into several sections:

- Transaction Header:** Includes a search bar and navigation icons.
- Lines Section:** A table with columns: ITEM, QUANTITY, DELIVERY, SALES REPRESENTATIVE, and TOTAL (WITHOUT TAX). It contains one row with '0' in the QUANTITY column. Below the table is a button 'Add product'.
- Payments Section:** A table with columns: LINES, DISCOUNTS, TAX, SUBTOTAL, and PAYMENTS. It shows a total of '\$0.00' for the AMOUNT DUE. Below the table is a button 'Add customer'.
- Action Panel (Right Side):** A vertical stack of buttons for various actions: Set quantity, Add loyalty card, Change unit of measure, Line comment, Return product, Gift card, Voids, Transaction options, Pay cash, and Pay card.
- Navigation Panel (Left Side):** A vertical stack of icons for home, search, and other functions.

ITEM	QUANTITY	DELIVERY	SALES REPRESENTATIVE	TOTAL (WITHOUT TAX)
	0			

LINES	TAX	SUBTOTAL	PAYMENTS
0	\$0.00	\$0.00	\$0.00
DISCOUNTS			
AMOUNT DUE			\$0.00

A photograph of two women in a clothing store. The woman on the left, with dark hair in a bun, is smiling and holding a card reader. The woman on the right, with long blonde hair, is holding a card to the reader. They are both holding brown paper shopping bags. The background shows clothing racks and framed pictures on the wall.

Questions?

