

National Book Tokens Gift Card user guide for booksellers

a. Web Authorisations Application:

Access the website:

1. Go to www.nationalbooktokens.co.uk/giftcard
2. Click Web Authorisations
3. Enter your GLN (BA account number)
4. Enter your user name and password

Note: Your user name and password were supplied to you. If you do not have a user name and password, contact Book Tokens Bookseller Gift Card Helpline on 03303 310345 from the UK, or 18008 560 74 from the Republic of Ireland.

Tip: You can also access the site through the Bookseller Zone link at the bottom of the page www.nationalbooktokens.co.uk

Important: If this is the first time you have used the Web Application to process Gift Cards you first need to set up an Employee PIN. Details on setting up a PIN can be found in the section *Web Administration Application, Setting up new Users and Employee PINs.*

If you also wish to print receipts for your customers, you will also need to set up your printer (if you need help with this please contact Book Tokens Bookseller Gift Card Helpline on the numbers above)



Sell, Redeem or Top-up a Gift Card:

1. Click Sell, Redeem or Top-up
2. Enter your Employee PIN (keep this number safe)
3. Swipe the Gift Card via the Magnetic Stripe reader
4. Enter the value
5. Click Confirm
6. Print a receipt for your customer

Do a Balance Enquiry:

1. Click Balance Enquiry
2. Enter your Employee PIN
3. Swipe the Gift Card via the Magnetic Stripe reader
4. Click Confirm

Need Help? Click on the **Help** Button at any time.

DO NOT use the **Backspace** button to return to a previous page if you have made a mistake, only use the **Cancel** Button.

Tip - Ensure that you have logged on in the morning – this will save you time when your first National Book Tokens customer of the day arrives.

Tip - Add www.nationalbooktokens.co.uk/giftcard to your favourites to save you time in the future.

NOTE: It is possible that a Gift Card may become damaged and unreadable via the magnetic stripe reader. If this happens please manually key the card number. See section on Keyed Number Entry (below)

Print a receipt:

1. Click Print Receipt
2. An image of a receipt will be generated on screen along with a Print Dialogue box.
3. If your printer is set up click Print and a receipt will be printed via your thermal printer. If you need help setting up your printer please contact the Book Tokens Bookseller Gift Card Helpline on 0844 9120397

Tip - Don't forget to run the transaction through your till

How to sell more than one Gift Card at a time

If a customer wishes to purchase multiple Gift Cards you can sell them more than one at a time by using the Multiple Card Button. Simply enter each Gift Card number and the required value. The system will automatically total these for you.

Note: if you want to sell more than 5 cards at one time you will need to use the Bulk Loading facility in the Web Administration Application – refer to *Web Administration Application* section.

Tip - After you have completed a transaction return to the HOME page ready for your next Gift Card transaction

Note: Gift Cards allow customers to retain any unused balance on the card for future use. Please only redeem the value of the books being purchased.

Keyed Number Entry - If a Gift Card is damaged you may be unable to read the data via your Magnetic Stripe reader. If this happens, you can manually key in the card number.

The first six digits are already in the system so all you need to do is key in the remaining.

If you make an error in keying in the data, you will get an error message. You can use the 'CHECK' button to confirm you have entered a correct number.

Note: If your Magnetic Stripe reader stops working, please contact Book Tokens Customer Service as soon as possible.

Please Note: National Book Tokens can also be presented as eGift Vouchers – in this instance they may be displayed on a device or printed on a piece of paper. The card number and PIN are clearly displayed. Simply scan the barcode or key the card number in manually.

If you have any difficulty operating the Web Authorisations Application please call the Book Tokens Bookseller Gift Card Helpline on 03303 310345.

b. Web Administration Application User Guide:

- Create Employee PINs
- Set up User IDs
- Bulk Load Cards

Important: Before you can perform any transactions, you will need to set up an Employee PIN.

Logging in

1. Go to www.nationalbooktokens.co.uk/giftcard and click Web Administration
2. Enter your GLN (BA account number) – the GLN should appear automatically when you next access the site
3. Enter your User ID and password – (these were supplied to you. If you do not have a user name and password, please contact Book Tokens Bookseller Gift Card Helpline on 03303 310345)

NOTE: If this is the first time you have accessed one of the Gift Card sites you will be prompted to change your password

If you are logging in using a head office GLN, you will be prompted to select a branch GLN. If you clear the search field, and press search, all the GLNs in your group will appear in the results.

How to create a new Employee PIN:

Very important: Do NOT set up Employee PINs for everyone, only for those members of staff who need to perform transactions.

Create an Employee PIN

1. Click Employee PINs
2. Click NEW EMPLOYEE
3. Enter the Employee Name in the box provided
4. Enter a PIN for the employee

Tip: Don't forget you will need to set up a PIN for yourself

Confirming and Saving:

1. Once you are happy that the Employee Name is correct and that their PIN is ok, click Save New Employee
2. The Employee PIN has now been created and the Employee Name is now shown in the Employee box at the top of the screen **Note:**

Do NOT use the same Employee PIN for all members of staff – the Employee PIN should be unique to that staff member; this will help eliminate potential fraud or help to identify which staff have performed which transactions.

How to setup a User ID

Very Important: Do NOT set up User IDs for staff members that do not need access to advanced functions such as, user setup, running reports or authorising bulk loads. A PIN will be sufficient for most members of staff.

Create a new User ID:

1. Click User Logins
2. To add a New User click NEW USER
3. Enter a User ID for the user – this should consist of an alpha numeric combination that the user will remember, please use an initial capital letter (eg Bob123)
4. Enter the User Name (eg Bob Taylor)
5. Enter a User Password – this should be eight characters long and alpha numeric. The password should NOT contain any special characters or spaces.

Note: User IDs and Password are case sensitive

Selecting User Roles & Applications:

1. Click the Role you wish the user to have (see details below of how to select a Role and some recommended profiles)
2. Select the Applications you wish the User to be able to access 3. Click Save New User

A few recommended profiles:

Please note: To reduce the risk of theft do NOT assign unnecessary roles or access to members of staff

A Bookseller (i.e. most members of staff) – for an employee who does not need to log in to the system in the morning, please **do not allocate them a User ID or Password**, simply allocate them a PIN. Using a PIN they can perform basic transactions.

A Senior Bookseller – for an employee who may need to log in to the system, we recommend that they are allocated a *Basic Merchant Supervisor Role* with *Authorisations* access only, plus a PIN. This will allow them to log in and perform transactions (other than bulk loads). They should not need access to the Reports or Administration applications.

A Senior Bookseller / Assistant Manager – for a member of staff who might manage the daily activity of the shop we recommend *Merchant Supervisor Role* with *Authorisations and Administration* access, plus a PIN. This will allow them to perform transactions including bulk loads and set up other PINs. They should not need access to the Reports application.

A Manager / Owner – for senior managers who run the business we recommend *Merchant Manager* with access to *Authorisations, Administration and Reports* applications, plus a PIN. This allows them to set up new users and to see all reports as well as perform all transaction types.

There are various configurations you can choose from, for instance you may have Accounts staff who only need access to the Reports application.

NB – When staff leave your business you must delete their User ID AND their Employee PIN immediately as the system can be accessed remotely.

REMEMBER – if you allocate an employee a User ID and Password, they can access the web application remotely. Only allocate User IDs and Passwords for employees who need to log in to the system. For all other employees only allocate PINs.

Tip:

- Anyone with a PIN allocated to them can perform a Gift Card transaction.
- People with PINs DO NOT need to have User Logins if they do not need to perform anything other than Gift Card transactions.
- PINs will usually be sufficient for staff members that work on the shop floor and have no other back office administrative duties

Note:

User ID – this should be unique to each user. It is used when employees initially log in to each application that they have access privileges for. It is good practice to keep each User ID secure. User IDs can contain letters only or letters and numbers, you cannot use gaps, underscores or other characters.

User Name – this should be the user's actual name to allow you to identify each user easily on reports.

User Password – this should be a combination of letters and numbers. It should not be something obvious like your bookshop name or address.

User IDs, Names and Passwords are case sensitive.

Password and PIN Security – passwords and PINs must be kept secure, please do not tell anyone your password or allow others to see you key it in.

Lost Passwords:

Your master User ID and Password are allocated by Book Tokens Ltd. If you lose your password, you should call the Book Tokens Bookseller Gift Card Helpline on 03303 310345.

Strict security protocols are in place governing the issuance of new Passwords. You will need to know your account details and most importantly must call the helpline from the telephone number we have registered on our system. We cannot issue replacement passwords if you are calling from a mobile or other telephone number.

User IDs, Passwords and PINs for store staff, are allocated by the owner or manager. It is the owner or manager's responsibility to replace these if lost or forgotten.

Bulk Loading:

1. Go to www.nationalbooktokens.co.uk/giftcard and click Web Administration
2. Enter your GLN, User ID and Password

Selecting Cards and Entering Bulk Details:

1. Select a pack of unopened sequentially numbered cards
2. Count out the number of cards you need to load, remembering to keep them in order
3. Enter the numbers of the first card and last card in the relevant fields (lowest first)

NOTE: Checking Card Numbers: There are special security features embedded in the card number. Due to this, to check card sequence you should disregard the final 'check' digit and look at the 3 numbers that immediately precede it - shown here in bold 63379208880000**7160**

4. Confirm the number of cards in your sequence by entering the figure in the 'Number of Cards' field

Loading Value:

1. Enter the amount to be loaded onto the cards – each card in the bulk load will have the same value loaded onto it
2. Click Load/Activate
3. Wait for the Results response and check that each card is loaded – this may take a few seconds

Tip:

If you receive any error messages click the Help Button to help resolve the issue or explain the message

PLEASE NOTE – you must only use pre-packed sequential cards for bulk loading. You should always check that the number of cards you have loaded matches the number of cards you supply your customer. Cards come in packs of 10 or 20.

To ensure the integrity of the sequence is maintained you should only use unopened packs. If the pack has been opened, you must manually check that the card numbers are sequential.

c. Using Web Reports:

The Web Reports Engine (WREN) help you keep track of all your Gift Card transactions and your current available credit limit.

To Access the Reports site

1. Go to www.nationalbooktokens.co.uk/giftcard and click REPORTS (you will be directed to a Login Page)
2. Enter your GLN and Password
3. Click Login

To Run a Report

1. Select the report you wish to run and click Run Report
2. Select the dates for the report you wish to view
3. Click Run Report

Tip: To run the same report with different criteria click [Change Criteria](#). To run a different report click [Another Report](#)

What each report does:

- **Invoice Reconciliation Report** – shows a summary of all your sales and redemptions for the month selected. This report will match the data on your month end Statement.
- **End of Day** – shows summary of sales and redemptions for the date(s) selected. You should use this to reconcile your Gift Card transactions with your till.
- **Limit Query Report** – shows how much of your monthly credit limit you have used and what is remaining. If you are concerned about hitting your credit limit at any time, you should contact Book Tokens Credit Control to discuss your options.
- **Transaction Log Report** – shows you the date and time of each transaction, who performed the transaction and which method they used (eg Web, Terminal, Telephone (IVR)).
- **Bulk Load Report** - This report will show you any bulk loads that have been performed.

Note: If you are logged in as a head office, you will be able to filter some of these reports to show you group or individual store transactions.

Note: Only the first 10 transactions are displayed for each report. Transactions may stretch over several pages, so adjust the number shown per page, or view other pages by using the arrow buttons at the top right of the page.

Tip: The best way to interrogate the data in a report is to download as a Excel spreadsheet. You can also save downloaded reports for future quick reference.

The importance of running reports

- Running daily or weekly reports will help to ensure that you keep track of all your Gift Card transactions.
- Reports are useful for comparing against daily till reconciliations
- Running reports regularly will help you spot any errors or staff fraud that may have occurred

Note: Transactions shown in the reports DO NOT take into account the 1% service charge on these transactions. For details of the 1% service charge please refer to your monthly statements.

Please refer to the Bookseller Zone for additional information including details on ordering stock and updated service information. <https://www.nationalbooktokens.com/trade>

