

Gift Certificates | Getting Started

Many properties sell and accept Gift Certificates as a normal course of business. The first step is to prepare a Gift Certificate system that works for your property. The way you record Gift Certificate transactions in MyPMS depends on several factors. Before you set up Gift Certificates in MYPMS, think about these questions and prepare any necessary information. The transactions recorded in MyPMS can be used in conjunction with another accounting system.

- How many Gift Certificates do you sell per year?
- Do you have an expiry date?
- Do you have different Gift Certificates for specific items like Spa or Restaurant?
- Do you need to track Gift Certificates using a # system that has already been created on Printed Gift Certificates or spreadsheet.
- Are you already tracking gift Certificates in another program like Excel?

Gift Certificates

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Overview of Gift Certificates in MyPMS

MyPMS gives you the ability to sell, redeem and track Gift Certificates by transaction, not by Booking or Guest. What this means is that gift certificates can be tracked by date sold or redeemed, by Folio # or Name in Transactions Reports, but they will not be attached to a specific guest or tracked in an accounts payable account. If you need further tracking, more details, a flag for expiration dates, tracking by Guest, etc., then we recommend incorporating the transaction details from MyPMS into an additional tracking method such as an excel spreadsheet. See [Manage Gift Certificates](#)

A **Gift Certificate is an Inventory Item** which can be sold in a folio using "Add Charge". See [Gift Certificates | Setup](#)

When a **Gift Certificate is sold**, the charge is recorded and paid for using the chosen payment method, ie. cash, credit card, etc. in a House Account Folio. See [Gift Certificates | Sell](#). There are two ways to use the House Accounts for Gift Certificates. See [Gift Certificates | House Accounts](#)

When a **Gift Certificate is redeemed**, it is applied as a payment to a guest folio using payment type "Gift Certificate Redeemed". See [Gift Certificates | Redeem](#)

Since the two transactions (Sold and Redeemed) are recorded in different folios and on different dates, the best way to "match" a Gift Certificate to sold and when it is redeemed is to use the **transaction description** record details like purchaser name, folio #, gift certificate #, expiry dates, etc.. If you already have a Gift Certificate system set up and have tracking #, then you can use these in the transaction description. [Gift Certificates | Getting Started](#)

To **track the sale and redemption** of Gift Certificates, see [Gift Certificates | Reports](#)

Here is an Example. For step-by-step instructions, see each section.

Gift Certificate Sold in HOUSE ACCOUNTS: A Gift Certificate is sold for \$150 to Kim Johnson. It expires 1 year from purchase date.

- In the House Account Folio for Gift Certificate charge is added with In the Description, enter the name, expiry date. Remember the Transaction Type will already say "Gift Certificate" so add other details to the description. For example, "Kim Johnson. Expires 10/31/17"
- Go to Add Payment and choose the payment type. In the Description, enter Gift Certificate, the name, expiry date, etc. Remember the Transaction Type will only say the payment type so add "Gift Certificate" to the description. For example, "Kim Johnson.. #101116 Expires 10/11/17"

Front Desk Booking Reports Arrivals In House Departures Search System Date: 11-OCT-2016

Front Desk Phone List Housekeeping AR Accounts **House Accounts** Pass On Log Night Audit

House Accounts [Edit Folio Setup](#) | [Add New Charge](#) | [Add Payment](#)

Primary Folio/\$0.00 Spa Treatments/\$0.00 Restaurants/\$0.00 Gift Shop/\$0.00 FrontDesk Items/\$0.00

Gift Certificates/\$0.00 [Add New Folio](#) [Search Folio](#)

Folio #: 4602631 Expires 365 days from date of purchase. [Print Folio](#) | [Folio to Excel](#)

Date	Site Date	User	Type	Description	Qty	Charges	Payments
24-OCT-2016	11-OCT-2016	BC	Gift Certificate	Kim Johnson. #101116 Expires 10/11/17	1	\$150.00	
24-OCT-2016	11-OCT-2016	BC	Visa	Kim Johnson. #101116 Expires 10/11/17 Visa	1		\$150.00
Transfer checked items to Select From List						Total:	\$150.00 \$150.00
Print checked items to POS Printer Select						Balance:	\$0.00

[Close this Folio](#)

Redeeming the Gift Certificate in Guest Folio: Then, a guest presents this Gift Certificate as Payment.

- When adding a payment to the Guest Folio, choose the Payment type you created for Gift Certificates, i.e. "Gift Certificate Redeemed". and apply payment.
- In the Description, enter the same description as was used in the Gift Certificate Sale, ". Remember the Transaction Type will already say "Gift Certificate Redeemed" so add other details to the description. For example, "Kim Johnson. #101116 Expires 10/11/17"

If you need to locate the Gift Certificate sold, then search in the House Account Folios. See [Gift Certificates | Manage](#)

Front Desk Booking Reports Arrivals In House Departures Search System Date: 11-OCT-2016

Booking by Inquiry Booking by Availability Tape Chart Group Booking Wizard Search Bookings Group Bookings

Load Last Booking

85508 - Williams Jane

# Guests: 1/0/0	Booking for: 09-OCT-2016-11-OCT-2016	Room Type: SUITE - 2 Bedroom	Room: 109	Status: Active
Projected Inc: \$714.00	Projected Inc + Charges: \$714.00	Projected Bal: \$564.00	Folio Bal: \$564.00	

Booking Data **Folio** Edit Room Assignment Guest History Letters Log

Choose Folio: Primary Folio: \$564.00 [Add New Folio](#) | [Folio Setup](#) [Email Folio](#) | [Print Folio](#) | [Folio to Excel](#)

Primary Folio: \$564.00

Folio #: 4578707

11-OCT-2016	10-OCT-2016	NtAudit BC	Room Rent	Room Rent 109--Occupancy Tax	1	\$57.00	
11-OCT-2016	09-OCT-2016	NtAudit BC	Room Rent	Room Rent 109	1	\$300.00	
11-OCT-2016	09-OCT-2016	NtAudit BC	Room Rent	Room Rent 109--Occupancy Tax	1	\$57.00	
25-OCT-2016	11-OCT-2016	BC	Gift Certificate Redeemed	Kim Johnson. #101116 Expires 10/11/17 Gift Certificate Redeemed	1		\$150.00
Transfer checked items to Select From List						Total:	\$714.00 \$150.00
						Balance:	\$564.00