

Gift Certificates | Manage

Managing Gift Certificates On a Daily Basis

When you get a person who wants to BUY a Gift Certificate, sell them one in the House Accounts Screen (**Front Desk | House Accounts**). Make sure you place the Gift Certificate number in the Description field so that you have a note attached in BookingCenter that shows which Gift Certificate number you sold, to whom, and on what date.

When a customer wants to pay for their bookings - or other sale items such as a beverage, shirt, mug - with a Gift Certificate, simply choose the Payment type: "Gift Certificate Redeemed" when issuing a receipt and place the number for the redeeming Gift Certificate in the description field, and voila! You have a record of when you redeemed the Gift Certificate.

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.. You could also use a use a numbering system that will "link" the two transaction together. This could be a numbering system you create or the Folio # of the House Account Folio For example, if you create your own numbering system, it could be based on the date sold like 051316 for May 13, 2016. Or, you could use the Folio # from the Gift Certificate Sale in House Accounts. If you already have a Gift Certificate system set up and have tracking #, then you can use these in the transaction description.

To track the sales of Gift Certificates use the [Transactions Report](#) or the [Inventory Items Report](#).

If you do use another tracking system, It's good practice to update your spreadsheet of Gift Certificates when you sell and redeem them. Reports can help you balance your Gift Certificate program. There are two ways to do this in MyPMS:

1. To find out when you sold a Gift Certificate, choose **Reports | Accounting | Transactions** and choose the date range desired and the Transaction Type ("Gift Certificate Sold") and a list of all the Gift Certificates you SOLD will appear with specific Sale reference information. See [Gift Certificates | Reports](#)
2. To find out when and to whom you redeemed a Gift Certificate, choose **Reports | Accounting | Transactions** and choose the date range desired and the Transaction Type ("Gift Certificate Redeemed") and choose the date range desired. A list of all the Gift Certificates you REDEEMED will appear with the note containing the Gift Certificate number. See [Gift Certificates | Reports](#)

Make a list of the Gift Certificates you sell - using the numbering system you like. In one column, write the Gift Certificate number; in another the Date Sold; in another the Quantity (in \$\$); in another the Date Redeemed. Many of our properties use a spreadsheet (MS Excel) to list the Gift Certificate they are selling and the date at which they were redeemed.

Gift Certificates

- [Gift Certificates | Getting Started](#)
- [Gift Certificates | Setup](#)
- [Gift Certificates | House Accounts](#)
- [Gift Certificates | Sell](#)
- [Gift Certificates | Redeem](#)
- [Gift Certificates | Manage](#)
- [Gift Certificates | Reports](#)