Gift Certificates | Sell

A Gift Certificate is an Inventory Item which is charged to a folio through "Add Charge". Before you sell a Gift Certificate it must be set up as an Inventory Item first. See Gift Certificates | Setup

When a Gift Certificate is sold, the transaction is charged and paid for in the same House Account folio. When a Gift Certificate is redeemed, it is applied as a payment in 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.

To track the sales of Gift Certificates use the Transactions Report or the Inventory Items Report.

Gift Certificates

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There are two options for using the House Accounts for Gift Certificates. For details on using each option, see Gift Certificates | House Accounts

See step-by-step instructions on how to record a Gift Certificate sale using each option below

- **Option 1: Use One Folio to Track Gift Certificates:** Use one House Accounts Folio to track all Gift Certificates purchased and redeemed.
- **Option 2: Setup a new folio for each gift certificate purchased:** Add a new House Accounts folio for each gift certificate purchased.

Regardless of which option you chose, adding the charge and receiving payment in the folio for the Gift Certificate is the same. To make tracking easier, be sure that that the descriptions of each transaction matches and contains as much detail as possible.

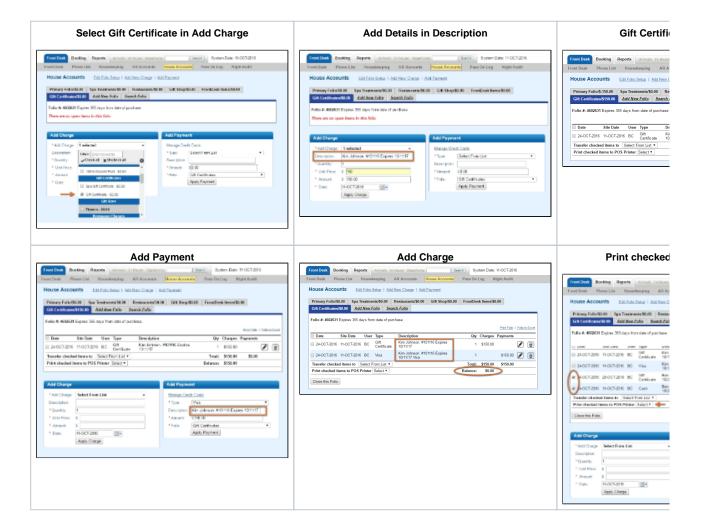All Transactions can be tracked in the Transactions Report.

Option 1: Sell Gift Certificates in One House Account Folio

- Go to **FRONT DESK | HOUSE ACCOUNTS** and click on the "Gift Certificates" Folio.
- **Add Charge:** Go to Add Charge and choose "Gift Certificate" (or whatever you have named this inventory item) from the Charge type drop-down list.
  - In the Description, enter the name, Gift Certificate#, expiry date, etc. Remember the Transaction Type will already say "Gift Certificate" so add other details to the description. In this example, we included the name, a gift Certificate #, and Expiry Date. "Kim Johnson. #101116 Expires 10/11/17"

- **Add Payment:** Go to Add Payment and choose the payment type. Ie. Visa, cash, etc.
  - In the Description, enter the name, GC#, expiry date, etc. Be sure that that the description matches the description in Add Charge. Remember the Transaction Type will only say the payment type ie "Visa" so add "Gift Certificate" to the description. For example, "Gift Certificate: Kim Johnson. #101116 Expires 10/31/17"
- **Print Folio**: If you are using one folio to record all Gift Certificate Sales, then there will eventually be multiple transactions that have occurred in the past. Just clicking "print folio" will generate a receipt of all transactions. To print or email specific transactions, click the check box next to the transactions and use the "Print checked items to POS Printer". You must have a POS Letter setup in Letters to use this option. See POS Receipt Function

Remember all folios must be balanced in order to complete night audit, so be sure to make charges and take payments in the correct folios.

 Example: In this example a Gift Certificate is sold for $150 to Kim Johnson. It expires 1 year from purchase date. We created a numbering system using the date purchased. Ie. Purchase date is Oct. 11, 2016. Gift Certificate # is 101116. In the "Print checked items to POS Printer" gives an example of a second Gift Certificate Sale added and the transactions chose to print.

Click on images to enlarge

Select Gift Certificate in Add Charge	Add Details in Description	Gift Certific

Add Payment	Add Charge	Print checked

Option 2: Setup a new folio for each gift certificate purchased

Add a new House Accounts folio for each gift certificate purchased. You can create as many folios as you need and each folio will function independently using the basic folio operations.

- Go to **FRONT DESK | HOUSE ACCOUNTS**
- Set up your new folio for the Gift Certificate Sale. **Name the Folio**: Since this is for an individual sale, use the name of the person and/or the word GC for Gift Certificate for easy searching. The name of the folio depends on what works best for your system and what will be easy to search. This can be the Folio # or Folio Name.
- **Add Charge:** Go to Add Charge and choose "Gift Certificate" (or whatever you have named this inventory item) from the Charge type drop-down list.
  - In the Description, Gift Certificate#, expiry date, etc. Remember the Transaction Type will already say "Gift Certificate" and the folio may already have the name of the customer so this can be used for other details like expiry date. Ie. "Expires 10/11 /17"

- **Add Payment:** Go to Add Payment and choose the payment type. Ie. Visa, cash, etc.
  - In the Description, enter the the description matches the description in Add Charge. Remember the Transaction Type will only say the payment type ie "Visa" so add "Gift Certificate" to the description. For example, "Gift Certificate: Expires 10/31 /17"
- **Print Folio**: Since this folio was created for this one sale and only contains the charge and payment, then you can just choose to "print the folio".
- **Close Folio**: After the payment has been applied and the folio is balanced, then close the folio when you are ready. This prevents the House Accounts area from becoming cluttered with multiple folios.
- **Search Folio:** Click on the "Search Folio" Tab in House Accounts to search for the folio after it has been closed. Enter the name of the folio and it will appear in the list. To see the Folio details, click on the "pencil" icon. This may be useful when the Gift Certificate is redeemed. See Gift Certificates | Redeem

Remember all folios must be balanced in order to complete night audit, so be sure to make charges and take payments in the correct folios.

 Example: In this example a Gift Certificate is sold for $100 to Ben Smith. It expires 1 year from purchase date. A new folio is created with his name and the code GC for Gift Certificate. This will make it easy to search for the folio by name or GC. After the charge and payment has been added, we print the folio and then close it. We will use the Search Folio function, when the Gift Certificate is presented as payment to get the Folio # to enter in the payment description.

Setup and Select the Folio you set up for the Gift Certificate sale.

Print Folio