WMS: Did You Know? From Professor Merlot



Gift Certificates - how do I sell one and how to redeem one?

Gift certificates are a special kind of sale. These are setup in WMS just as any other product, but with a slight difference since you **sell** one and then **redeem** it at a later date. WMS tracks these

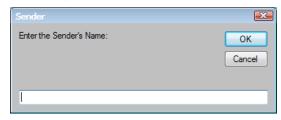
easily, here's how:

Create the Product:

- Gift Certificate open the Products form and create a product, Gift Certificate
- **Set the Unit Price** = \$1.00.
- Set the Gift Certificate Checkbox = Checked
- Set all of the taxes = Unchecked
- Note: this only needs to be done once

Sell a Gift Certificate:

- On an Invoice, select Gift Certificate from the Item Product selection.
- In the **Qty** field, enter the **value** of the gift certificate to be sold. In this instance we will enter 75.5 in the quantity field. Notice the **Total** field will show \$75.50.
- Receive the payment from the customer in the normal manner using the **Payments** button and screen (Visa, Master Card etc).
- Print a Gift Certificate for the customer:
 - Select Gift Certificate Small in the report selector drop down (next to Printer button)
 - Fill the Print Preview checkbox
 - Press the **Printer button** to preview the certificate.
 - Enter the **Sender's Name** in the pop form.
 If this is a charity item, leave blank.
 - Enter the **Recipient's Name** in the pop form. If this is a charity item, leave blank and press OK.
 - The Gift Certificate is displayed and printed. Cut the paper to insert into a #10 envelope or insert into a bottle.
 - Names may be hand written but should be signed by a store staffer.









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Wineman, Kevin

11722-28548 \$75.50

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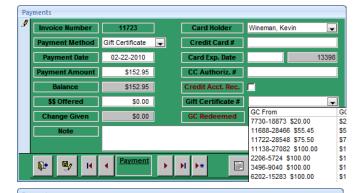
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Redeem a Gift Certificate:

- Complete the Invoice normally, with a total of \$152.95 for example. Press Payments.
- On the Payments form, select the Payment Method of Gift Certificate.
- Values for Payment Date (today) and Payment Amount (\$Total) are set automatically.

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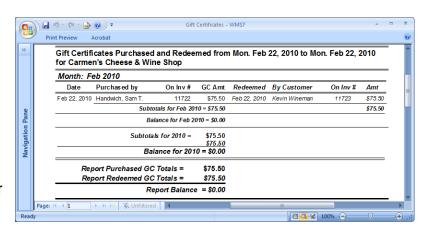
- Open the Gift Certificate # Drop Down to show all the GC's in the system.
- Note the third one down in the list is the one that is to be redeemed, \$75.50.



- Select this one for \$75.50
- Notice that the Payment Amount is changed to \$75.50 and GC Redeemed is checked.
- Save this payment and create a second payment for the balance that is owed on this Invoice, \$77.45.
- This method tracks all GCs in WMS and ensures that it cannot be used more than once.

Check for Outstanding Gift Certificates:

- For year-end statistics, select Gift Certificate
 Status in the Report Selector on the
 Products form.
- Detail of all of those purchased and all of those redeemed is shown.
- Any GCs not redeemed will also be displayed for your accountant's requirements.



\$152.95

\$0.00



