

Gift Certificate Selling and Acceptance Procedure

Selling a Gift Certificate:

- 1- Create a new invoice.
 - a. If it is a known customer put the invoice on their account.
 - b. If it is an unknown customer place the sale under the Cash Sale account.

Note: The Gift Certificate Account is no longer to be used.
- 2- When the sale detail box appears
 - a. Select Service on the line type box.
 - b. Select Gift Certificate in the GL Acct # box.
 - c. Select 1 in the quantity box
 - d. Enter the gift certificate amount in the sale price box.
 - e. Insert notes if needed.
 - f. Select OK
- 3- When the new sales detail box appears select cancel.
- 4- Select the Payment box
 - a. Insert the payment amount.
 - b. Insert the Payment Type
 - c. Select OK on Change Payment Box
 - d. Select Close on Enter Payment Box
- 5- Select OK on Invoice page and give printout to the customer.
- 6- Fill out all blanks on the Gift Certificate and include the invoice number.

Accepting a Gift Certificate:

- 1- Verify Gift Certificate is Valid and has not expired.
- 2- Create a new invoice or invoice from the dispatch.
 - a. If it is a known customer put the invoice on their account.
 - b. If it is an unknown customer place the sale under the Cash Sale account.

Note: The Gift Certificate Account is no longer to be used.
- 3- When the sale detail box appears
 - a. Select the part, service, instruction, or rental and proceed as a normal transaction.
 - b. Insert notes if needed.
 - c. Select OK
- 4- When Accepting a payment
 - a. Select the Payment box
 - b. Insert the payment amount.
 - c. Select Gift Certificate as the Payment Type
 - d. Select OK on Change Payment Box
 - e. Select Close on Enter Payment Box
- 5- Select OK on Invoice page and give printout to the customer.