

# gift certificates

Follow these steps to issue, redeem and view a gift certificate.

## Selling a Gift Certificate

1. From the SalonBiz®/SpaBiz® menu bar, click on the Ticket icon.
2. Click on the New Ticket button.
3. From the Sales Ticket screen, enter the purchaser's name on the sales ticket. Note: A gift certificate should never be sold on a walk-in ticket because it is difficult to track.
4. Click on the Add Gift button.
5. Type the first few letters of the customer's first and last name (use the Tab key on your keyboard to move between fields) in the corresponding fields, press the Enter key.
  - If the recipient is already in the system select their name from the Search For Customer screen.
  - If the recipient is not in the system and the purchaser knows the information necessary to add the customer, press the Add New button. Fill out the required fields in the Add New Customer screen.
  - If this information is not available, click the Same as Ticket button to record the gift certificate under the purchaser's name.
6. Click in the serial number field and scan the gift certificate or type in the serial number.
7. From the drop down menu Gift Type select a gift type from the list.
8. Type in the dollar value of the gift certificate in the Value of Gift field.
9. Type in the amount of days the gift certificate will be valid. If there will be no expiration leave 0 in the days valid field.
10. Click the Save Gift Certificate button.
11. Enter in a staff code in the Staff1 field.
12. Select the payment type.
13. Click the Process Ticket button.



### Auto Calculating a Gift Certificate

1. Follow steps 1-7 above.
2. Click on the Service button to automatically add a service to the value of the gift certificate.
3. Click the Products button to automatically add products to the value of the gift certificate.
4. Click the Packages button to automatically add any packages to the value of the gift certificate.
5. To include tax in the value of the gift certificate click on the Add Product Tax and/or Add Service Tax button.
6. To view all products and/or services added click the drop down menu in the Selected Products/Services/Packages field.
7. Type in the amount of days the gift certificate will be valid. If there will be no expiration leave 0 in the days valid field.
8. Click the Save Gift Certificate button.
9. Enter in a staff code in the Staff1 field.
10. Select the payment type.
11. Click the Process Ticket button.

### Redeeming a Gift Certificate

1. From the Sales Ticket screen, click on the Gift button (may be located under the See More button).
2. All gift certificates that are issued for this client will be displayed in the Open Gift Certificates for Customer field.
3. In the Serial Num field type in or scan the gift certificate.
4. If you are unable to scan or type in the number click on the drop down menu and select a gift certificate from the list.
5. Enter the amount of the sale in the Payment field.
6. Click the Save Payment button.
7. If the gift certificate does not cover the entire amount due, type in the amount in the Payment field, then click the Save Payment button. From the Sales Ticket screen select an additional payment type and click the Process Ticket button.
8. If the certificate balance is greater than the amount of the ticket, type in the amount due in the Payment field, then click the Save Payment button. From the Sales Ticket click the Process Ticket button to process and close the sales ticket. Note: The balance of the gift certificate will be retained on the customer's file and the gift certificate.
9. Click the Process Ticket button.



### Viewing a Gift Certificate

1. From the SalonBiz®/SpaBiz® menu bar, click on the Ticket icon.
2. Select Gift Certificate in the View List field.
3. Choose from the drop down menu list in the Filter By field.
4. Click on the gift certificate you wish to view.
5. Click the View It button.
6. Click the Return to Previous Screen button.

### Voiding a Gift Certificate

1. From the SalonBiz®/SpaBiz® menu bar, click on the Ticket icon.
2. Choose the method that you wish to view the gift certificate and follow the steps (listed above) for viewing a gift certificate.
3. When the gift certificate is displayed on the screen, highlight the Gift Certificate, and then click the Void Gift Certificate button.
4. Answer Yes to the message “Are sure you wish to void the Gift Certificate?”
5. The gift certificate will be voided.

### Returning a Gift Certificate

1. From the SalonBiz®/SpaBiz® menu bar, click on the Ticket icon.
2. Click the New Ticket button.
3. Type in the customer's first and last name on the ticket.
4. Click the Return Item button.
5. From the Type of Item Being Returned field, click on the Gift button.
6. Click in the Gift Certificates Open for Customer field and choose the gift certificate that the client is returning.
7. The gift certificate serial number and value will appear on the screen.
8. Click the Return Item button.
9. Choose the type of payment that you will use to refund the gift certificate.
10. Click the Enter button on your keyboard when the Pay Form screen appears. This will enter the amount of the gift certificate.
11. Click the Save Payment button.
12. Click the Process Ticket button.
13. Follow your procedure for returning.
14. The gift certificate will be voided.

