



Gift Certificates Overview

Gift certificates are setup in the Gift Certificate Setup screen. For more information, see "Gift Certificates" on page 321.

Setup Menu (Navigation Bar) → Configuration Icon → Sales Setup Menu (Configuration Bar) → Gift Certificate Icon



Gift Certificate Setup

General Gift Certificate Options

There are three general options which are system-wide, and apply to **ALL** gift certificates:

- **Employee receives ___% on Sale**

Employees can be given credit (put towards their sales figures) for selling gift certificates. This option allows to specify how much value (in %) an employee will receive when they sell a gift certificate. For example, if you want an employee to receive 50% of the value of the gift certificate whenever they sell one, type in 50% in the **Employee receives ___% on Sale** option. By default, the value that an employee receives for selling a gift certificate is 0%.

If you are not using the Clubs feature of Shortcuts, you may skip the following two options.

- **Award Points on Sale / Award Points on Redemption**

Decide whether a client is awarded points when they purchase a gift certificate, or when they redeem a gift certificate. If clients receive points when they redeem a gift certificate, tick the **Award points on redemption** option. By default, this option is ticked.

If clients receive points when they purchase a gift certificate, tick the **Award points on sale** option.



When checking either (or both) of the above settings, keep in mind that gift certificates are often purchased by people who give it to someone else as a gift, so it will not necessarily be the same person who purchases and redeems it.

Setting up a Standard Gift Certificate

1. Click the **New** button. The Gift Certificate Name window will appear.
2. Using the keyboard, type in the name of the new gift certificate.
3. Click the **Done** button. The new gift certificate name will appear in the Gift Certificates drop-down list.
4. If you want to track gift certificates by number when sold and redeemed at the Point of Sale, place a tick in the **Requires Tracking Number** tickbox.
5. If you want an employee to receive credit when selling a gift certificate, click to place a tick in the **Employee Receives Credit on Sale** tickbox.
6. Click to select the **Amount** field. Using the keyboard, type in the price for this gift certificate. You may want to leave this field at 0.00 if you want to change the price as required at the Point of Sale.
7. If tax is applied on gift certificates, click to select the relevant tax schedule from the **Tax Rate** drop-down list. Otherwise, click to select the **<Exempt>** option from the drop-down list.
8. If you want to specify an expiry date (in months) for a gift certificate, click to select the **Expiry** field and enter in the desired number of months. This expiry is calculated in terms of months from the date the gift certificate was first sold. For example, if the expiry date is set to 3 months, and the gift certificate was sold on 15th March, the gift certificate would expire on 15th June.

Once a gift certificate has expired, clients will not be able to redeem it. However, employees with the relevant security access will still be able to process expired gift certificates.



The Expiry field does not apply to Gift Card gift certificates.

9. Click the **Save** button to save your changes.

Setting up a GiftME Gift Certificate

If you are using GiftME in your business, you will need to create one or more GiftME gift certificates. These are sundry income items with pre-set values that, when purchased by a client, add the specified value to the client's gift card. For example, if you created a GiftME \$20 gift certificate sundry income item, a client can purchase the \$20 gift certificate to add the value of \$20 to his or her gift card.

1. Click the **New** button. The Gift Certificate Name window will appear.
2. Type in the name of the new GiftME gift certificate into the **Certificate Name** field, then click the **Done** button. A new gift certificate will be created, and the name of the new certificate will be displayed in the Gift Certificates drop-down list.
3. Ensure that the **Active** and **Is a Gift Card** options are ticked.

-
4. If you are creating a gift certificate with a pre-set value, click to select the **Amount** field and type in the desired amount.
If you are creating a gift certificate with an open value, leave the Amount field as 0.
 5. Click to select the **<Exempt>** option from the Tax Rate drop-down list.
 6. Click on the **Save** button to save your changes.
 7. If you want to create additional pre-set or open value gift certificates, repeat Steps 1 - 6 for each gift certificate you want to create.

Setting up a GiftME Adjustment Gift Certificate

If you are using GiftME in your business, you will need to setup an Adjustment Gift Certificate as well. This gift certificate is used for adjusting the value of a client's gift card in the event of refunds and similar circumstances.

1. Click the **New** button. The Gift Certificate Name window will appear.
2. Type in the name of the GiftME adjustment gift certificate into the **Certificate Name** field, then click the **Done** button. A new gift certificate will be created, and the name of the new adjustment certificate will be displayed in the Gift Certificates drop-down list.
3. Ensure that the **Active** and **Is a Gift Card Adjustment** options are ticked.
4. **IMPORTANT!** Ensure that the **Amount** field has a value of 0.
5. Click to select the **<Exempt>** option from the Tax Rate drop-down list.
6. Click on the **Save** button to save your changes.

Gift Certificate Status

An active gift certificate is one that is currently being sold in your business. If a gift certificate is no longer needed you can make it inactive. To view inactive gift certificates, tick the Display Inactive tickbox.

Making a Gift Certificate Inactive

1. Select the required gift certificate from the **Gift Certificate** drop-down list.
2. Click to remove the tick from the **Active** tickbox.
3. Click the **Save** button to save your changes.

Gift Certificate Redemption Setup

Shortcuts uses payment types to redeem gift certificates at the Point of Sale. By using payment types, the tax component of the service/product will be collected and recorded at the time the gift certificate is redeemed. By default, the Gift Certificate payment type is automatically setup and active, but if you have previously disabled it and want to re-enable it, follow the steps below in the Payment Type Setup screen.

Setup Menu (Navigation Bar) → Configuration Icon → Sales Setup Menu (Configuration Bar) → Payment Types Icon

The screenshot displays the 'Payment Types Setup' interface. The 'Payment Name' dropdown is set to 'Gift Certificate'. The 'Active' checkbox is checked, while 'Banking' and 'Income' are unchecked. The 'Description' field contains the text 'Sold Gift Certificates that are allocated Tracking Numbers'. The 'Club' dropdown is set to '< Payment not for a Club >'. At the bottom, there are three buttons: 'New' (with a star icon), 'Edit' (with a pencil icon), and 'Save' (with a folder icon). A 'Done' button with a green checkmark is located in the bottom right corner. The left sidebar includes 'Sales Setup' and 'Payment Types' icons. The right sidebar includes 'Setup' and 'Configuration' icons.

1. Click to select the **Gift Certificate** payment type from the Payment Name drop-down list.
2. Ensure the **Banking** and **Income** options for the are NOT ticked.
3. Click the **Save** button to save your changes.

Gift Certificate Barcodes

When you add a new gift certificate type in the Gift Certificate Setup screen, Shortcuts will automatically assign a barcode. Each gift certificate type can only have one barcode (but individual gift certificates can have a unique tracking number).

If you wish to enter a different barcode for the selected gift certificate type, double-click to highlight the **Barcode** field and using the keyboard, type or scan the barcode characters. Barcodes can be alpha-numeric and can store up to 15 characters.

Scanning a gift certificate barcode in the Gift Certificate screen will select the appropriate gift certificate type from the drop-down list.



If you are printing your own barcodes (i.e. barcodes you have generated yourself), it is recommended that you keep them to 5 or 6 characters only. See “Printing Product Barcodes” on page 209 for more information.

If a Barcode will not Scan:

1. Press F5 on the keyboard. The Enter Barcode window will appear.
2. Using the keyboard, type the barcode characters.
3. Click the **Done** button. The gift certificate information will appear in the Gift Certificate Setup screen.