Gift Certificates

Cavallo Support - 2024-11-22 - Sales

Overview

The Gift Certificate function supports the sale and redemption of serialized gift certificates. This functionality requires setup in both GP and SalesPad.

Setup

Note: In order to sell and use Gift Certificates, they must be received into inventory. Set up gift certificates as a Serialized Inventory Item.

To enable gift certificate payments:

IN DYNAMICS™ GP:

1. Set up a gift certificate payment type in Credit Card Setup (**Microsoft Dynamics GP** dropdown > Tools > Setup > Company > Credit Card).
2. Enter “GIFT CERT” into the Card Name field (the name MUST be “GIFT CERT”)
3. Check the **Accepted from Customers** box, select a card type, and enter the required data
4. Click **Save**
5. Set up an Item Number for the gift certificate in Item Maintenance (Cards > Inventory > Item).
    1. Enter an item number that will be used to identify the gift certificates
    2. Enter data pertaining to the new item as required
    3. Click the **Options** button to open the Item Maintenance Options screen
    4. Select Serial Numbers from the **Track** dropdown
    5. If desired, click the blue arrow button next to the field to configure a mask for received items (will control automatically generated serial numbers)
    6. Click **Save**

Note: For Step 5, you can also use the Item Maintenance feature within SalesPad.

IN SALESPAD:

1. Go to Modules > Settings
2. On the Filter line, type “gift”
3. Next to Gift Certificate Item Number, type the item number for gift certificates as configured in GP. **Note:** If this is left blank, gift certificate payments will be disabled and the Gift Certificate tab on the Payments screen will not appear
4. Click **Save**

Usage

SELLING A GIFT CERTIFICATE

Follow the steps below to sell a gift certificate:

1. Add the Gift Certificate Item Number as a line item on an order or invoice
2. Enter the value of the gift certificate in the price field on the line item
3. The sale of the card must be invoiced, and that invoice must be posted in Dynamics GP.

A printed Gift Certificate Report form may be created and printed at the point of sales document entry.

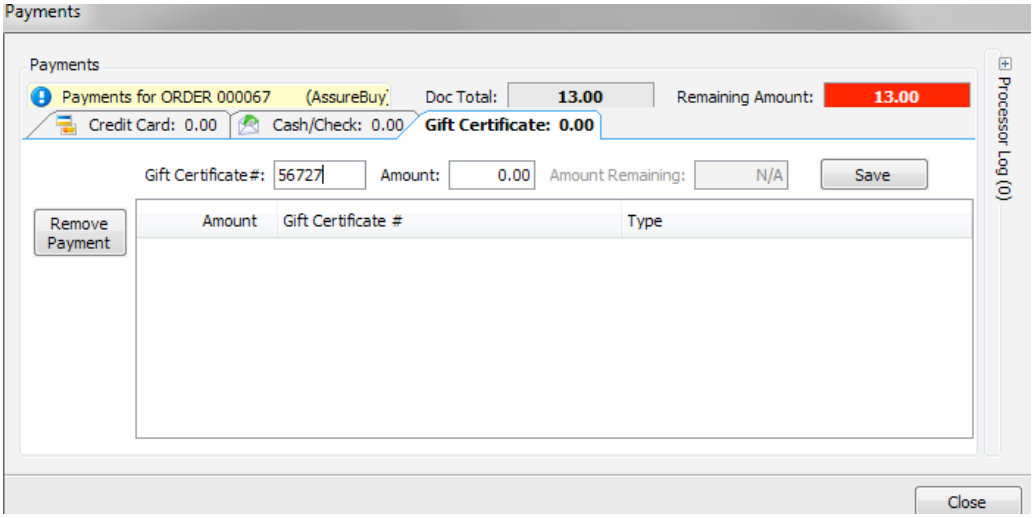
REDEEMING A GIFT CERTIFICATE

Note: Prior to redeeming a gift certificate, the certificate must be sold to the customer.

Follow the steps below to apply a gift certificate as payment on an order:

1. Open/create an order or invoice

2. On the header, or click the amount hyperlink in the Payment field (In versions prior to 4.1, you can also go to **Actions** ( ) > Payments). The Payments window appears
3. Click on the Gift Certificate tab



4. Enter a valid Gift Certificate #. The Amount will default to the value of the Sales Order and the Amount Remaining will automatically calculate based on the gift certificate's value.
   Note: The Gift Card number is actually a Gift Card serial number.
5. Click **Save**
6. SalesPad will keep track of any remaining amount left on the Gift Card.

Note: If you enter an invalid Gift Certificate number, an error message will appear, and will persist until the invalid number is changed or removed:

