

Gift Certificates Sold at Store - Product Code: **80003**

## Gift Certificate Procedures

### SELL a Gift Certificate

1. From **Wizards**, select **Gift Certificate**.
2. Select **Create a New Gift Certificate** (default). Select **Next**.
3. Type the gift certificate dollar amount. Select **Next**.
4. Type the recipient's first name, last name and desired comments (these fields are optional). Select **Next**.
5. Complete the recipient information on the **Customer Inquiry** screen.

**EXISTING CUSTOMER:** Type the phone number or last name. Select **Search**. Select **Next**.

**NEW CUSTOMER:** Select Add Customer, type the customer's telephone, name and address information. Select Add.

6. On the **Invoice Payment** screen, type salesman number and the gift certificate amount in the preferred payment field. Select **Finish**.
7. Select **OK** to print the invoice.

### REDEEM a Gift Certificate (sold at same store location)

1. From **Wizards**, select **Gift Certificate**.
2. Select **Redeem a Gift Certificate**. Select **Next**.
3. After viewing the gift certificate, type the store name, gift certificate form number and the transaction date. Select **Next**.

4. Type the recipient's name. Select **Search**. Click on the correct entry. Select **Next**. Select a listed vehicle or add a vehicle. Select **Next**. Select the product type and quantity.

5. On the **Invoice Payment** screen, type the Salesman ID. Type the remaining balance dollar amount in the preferred payment field. Select **Transaction Final**.

*If the purchase amount is less than the gift certificate amount, create a new gift certificate for the remaining amount as cash, or contact your regional office to verify the refund policy.*

6. Select **OK** to print the invoice.

### REDEEM a Gift Certificate (sold at different store location) (Temporary Procedure)

1. On the **Customer Inquiry** screen, type the recipient's name or phone number, select **Search**. Click the desired entry, select **Customer History**.
2. Confirm the entry is the **gift certificate transaction**.

*Call the originating store with the gift certificate information. Ask the store to complete a Cash Receipt Voucher transaction, in the amount of the gift certificate, using Cross-store Layaway as the type. The store redeeming the gift certificate should be noted in the comment line. A Layaway Refund No-sale should then be completed afterwards.*



*A Cash Receipt Voucher **MUST** be completed **BEFORE** the Layaway Refund No-sale!*

3. Complete a **Cash Payment Voucher**, in the amount of the gift certificate, using **Cross-store Layaway**. Type the gift certificate amount, layaway account information (listed under Customer History), and customer information. The store where the gift certificate originated should be noted in the comment line.
4. Complete an **Invoice** for products to be purchased. On the **Invoice Payment** screen, type the Salesman ID and mileage. Type the gift certificate amount in the **Cash** payment field. Collect additional payment if needed. Select **Transaction Final**.  
*If the purchase amount is **LESS** than the gift certificate amount, create a new gift certificate for the remaining amount as cash, or contact your regional office to verify the refund policy.*