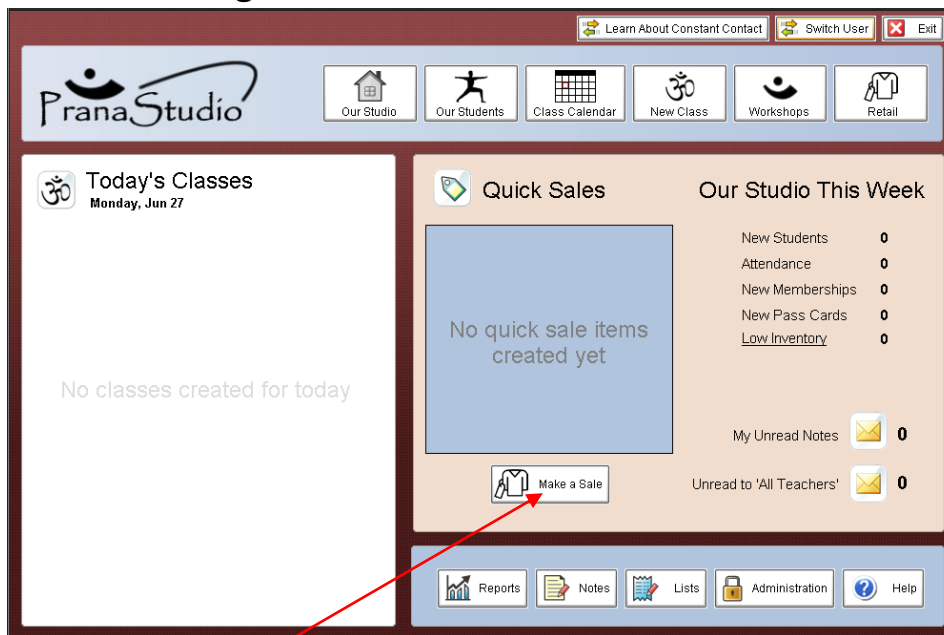


Tutorial 25: Selling and Redeeming Gift Cards

This tutorial explains how to sell and redeem gift cards. Gift cards can be sold containing any value you wish. You are able to use both magnetically encoded gift cards, or manually numbered gift cards. When composing gift card numbers it is advised that you do not use sequential numbers as this may place you at risk of forgery. Randomly generated numbers are advised; however you may wish to prefix these with a batch number to guarantee uniqueness. For example, A9228388453, A8737774843... for the first batch and B2093882198, B92170025522... for the second batch, and so on.

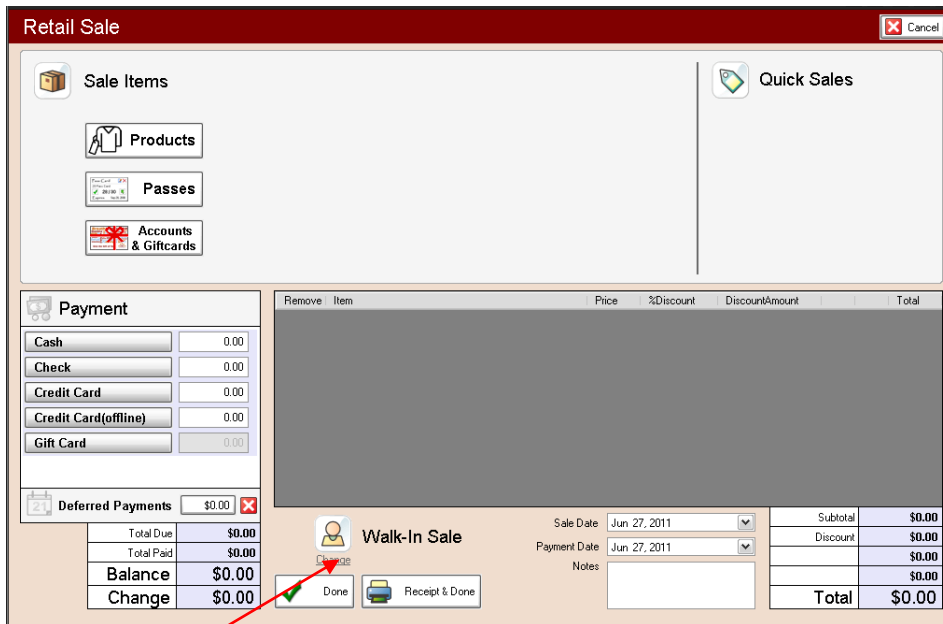
Part 1: Selling a Gift Card



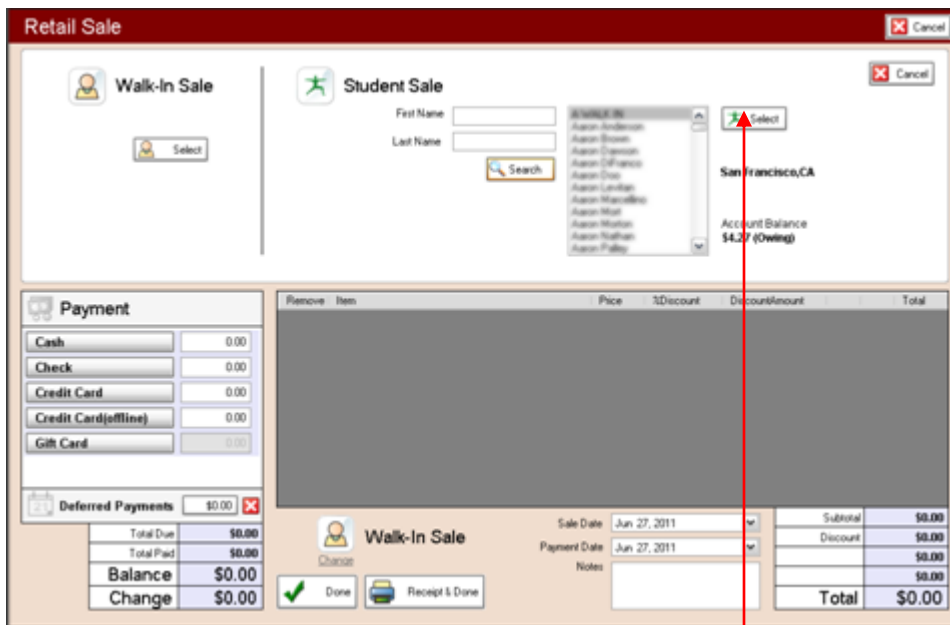
Click on the *Make a Sale* button.

Step 1: Select a Student

Gift cards **must** be sold to a student, this allows that student to be reissued a gift card in case they lose it.



Click on the *Change* button in order to select a student.



Select the purchaser from the list of students and click the *Select* button. If the purchaser has not yet been added to PranaStudio, you will need to create them first. Please see **Tutorial 3: Adding a New Student Record** for instructions on how to do so.

Part 2: Adding a Gift Card to the Order

The screenshot shows the 'Retail Sale' window. In the top right, there is a 'Quick Sales' button. Below it, there are two main sections: 'Account Payment' and 'Purchase Giftcard'. The 'Purchase Giftcard' section has a 'Giftcard Amount' input field containing '100.00' and an 'Add' button below it. A red arrow points from the 'Add' button to the 'Giftcard Amount' field. To the left of these sections are icons for 'Products', 'Passes', and 'Accounts & Giftcards'. Below the main sections is a 'Payment' section with buttons for 'Cash', 'Check', 'Credit Card', 'Credit Card (offline)', 'Gift Card', and 'On Account \$0.00'. There is also a 'Deferred Payments' section with a '\$0.00' value and a 'Change' button. At the bottom, there are 'Done' and 'Receipt & Done' buttons, along with 'Sale Date' and 'Payment Date' dropdowns set to 'Jun 27, 2011'. A summary table at the bottom right shows 'Subtotal \$0.00', 'Discount \$0.00', and 'Total \$0.00'.

Enter the amount that you wish to load onto the gift card in the *Giftcard Amount* box and click the *Add* button directly below it.

The screenshot shows the 'Process Gift Card' dialog box. It has a title bar with 'Process Gift Card' and a close button. Inside, there is a section titled 'Swipe or Enter Gift Card Now'. Below this title, it says 'Amount to Load: \$100'. There is a 'Card Number' label followed by an empty text input field. At the bottom left, there is a 'Cancel' button with a red 'X' icon.

The above screen should appear allowing you to enter the gift card number manually, or if you have magnetically encoded cards to swipe it. You should use an unused card from your stock. Reusing cards or card numbers that have already been issued is not currently supported.

Retail Sale
Cancel

Products

Passes

Accounts & Giftcards

Account Payment
 Payment Amount

Add

Purchase Giftcard
 Giftcard Amount

Add

Quick Sales

Payment

Cash	0.00
Check	0.00
Credit Card	0.00
Credit Card(offline)	0.00
Gift Card	0.00
On Account \$0.00	0.00
Deferred Payments	\$0.00

Total Due	\$100.00
Total Paid	\$0.00
Balance	\$100.00
Change	\$0.00

Remove	Item	Price	%Discount	DiscountAmount	Subtotal	Total
Remove	Gift Card #A736622883	\$100.00	0	\$0.00	\$0.00	\$100.00

Change
 Done

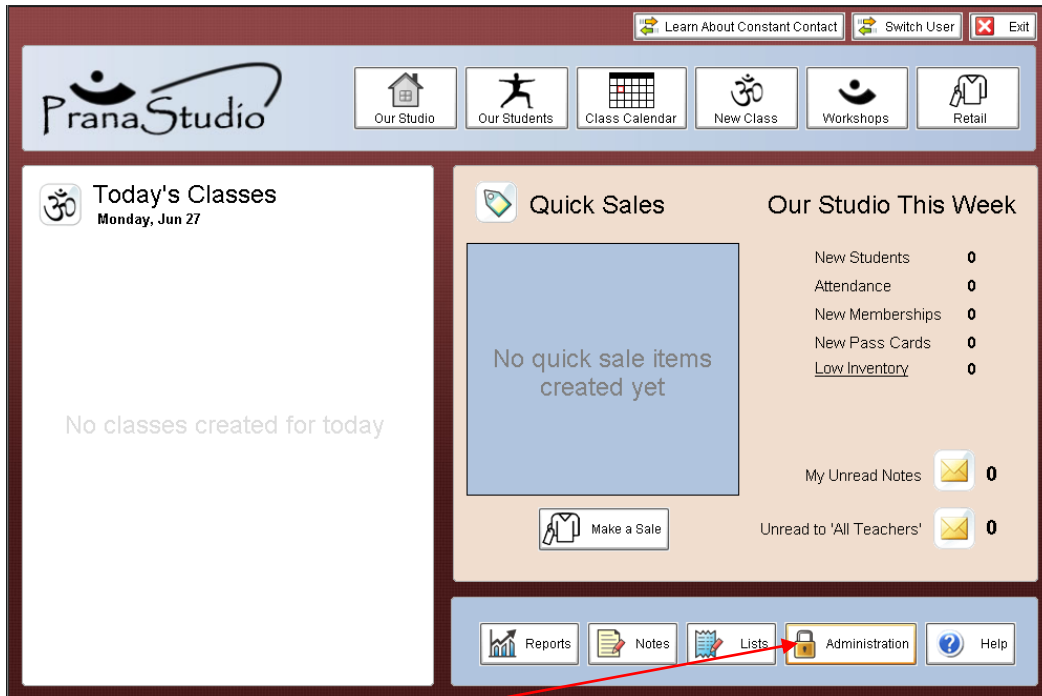
Sale Date: Jun 27, 2011
 Payment Date: Jun 27, 2011
 Notes:

Subtotal	\$100.00
Discount	\$0.00
	\$0.00
	\$0.00
Total	\$100.00

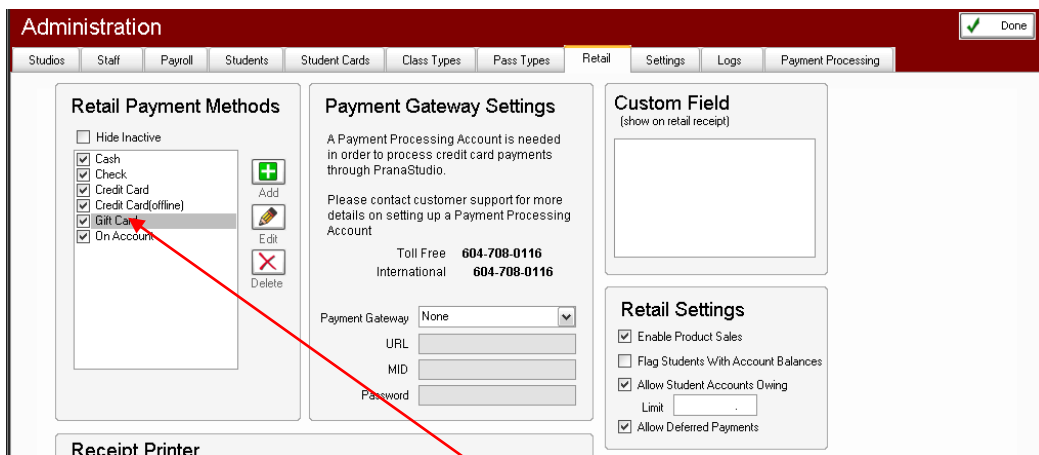
Proceed through the sale process as per usual. Once the sale is completed, issue the gift card to the customer (make sure it is the same gift card that was entered in the previous step). You may add additional items, or even additional gift cards to the same sale if you wish.

Part 2: Redeeming Gift Cards

Step 1: Enabling Gift Card Payments



Click on the *Administration* button on the main screen.



On the *Retail* tab, make sure that the **Gift Card** payment method is selected as active then click *Done*.

Step 2: Redeeming a Gift Card towards a Sale

Retail Sale [Cancel]

Products [Filter By] [Close Products]

Search By: [] [Search]

Category: []
 All Category
 Class Packages
 Clothing
 Clothing
 Food and Drink
 Gift Cert./Payment
 Gift Certificate
 Intro/Refer
 Inventory
 Management
 Mat/Towel/Rental Card
 Rental Items
 Yoga Supplies

Payment to Account

ID: pro2
 SKU:
 Supplier: Our Studio
 Category: Gift Cert./Payment
 Price: \$0.00
 Inventory: N/A
 Quantity: 1 [Add]

Payment

Cash: 0.00
 Check: 0.00
 Credit Card: 0.00
 Credit Card(offline): 0.00
Gift Card: 0.00
 On Account \$0.00

Deferred Payments: \$0.00 [X]

Remove	Item	Price	%Discount	DiscountAmount		Total
Remove	5 Class	\$75.00	0	\$0.00	\$0.00	\$75.00
Remove	Water	\$2.00	0	\$0.00	\$0.00	\$2.00
Remove	YOGA MAT	\$20.00	0	\$0.00	\$0.00	\$20.00
Remove	Mat Bag	\$15.00	0	\$0.00	\$0.00	\$15.00

Sale Date: Jun 27, 2011
 Payment Date: Jun 27, 2011

Aaron Anderson [Change] [Done] [Receipt & Done]

Total Due	\$112.00	Subtotal	\$112.00
Total Paid	\$0.00	Discount	\$0.00
Balance	\$112.00		\$0.00
Change	\$0.00	Total	\$112.00

Create a sale as usual. Once the customer presents her gift card for redemption, click on the *Gift Card* button in the *Payment* section.

Process Gift Card [X]

Process Gift Card

Swipe or Enter Gift Card Now

Card Number
 A123456789 [Done]

[Cancel]

The above screen will pop up allowing you to swipe or enter their gift card.

If there are any problems with redeeming the gift card a message will appear stating the reason.

Retail Sale Cancel

Sale Items

Products

Passes

Accounts & Giftcards

Category	Product
ALL	
Class Packages	1 Week \$20
Clothing	10 Class
Clothing	10 days Intro
Food and Drink	10 FDR \$10
Gift Cert./Payment	2 Months
Gift Certificate	3 Mo SPECIAL not offered
Intro/Refer	3 Month Special
Inventory	3 Month Special
Management	30 days for \$30
Mat/Towel/Rental C	5 Class
Rental Items	6 Month Special
Yoga Supplies	ALO beverage

ID: **pro15000082**

SKU:

Supplier: **Our Studio**

Category: **Class Packages**

Price: **\$0.00**

Inventory: **N/A**

Quantity:

Quick Sales

Payment

Cash	12.00
Check	0.00
Credit Card	0.00
Credit Card(offline)	0.00
Gift Card	100.00
On Account \$0.00	0.00
Deferred Payments	\$0.00

Total Due	\$112.00
Total Paid	\$112.00
Balance	\$0.00
Change	\$0.00

Remove	Item	Price	%Discount	DiscountAmount	Total
Remove	5 Class	\$75.00	0	\$0.00	\$0.00 \$75.00
Remove	Water	\$2.00	0	\$0.00	\$0.00 \$2.00
Remove	YOGA MAT	\$20.00	0	\$0.00	\$0.00 \$20.00
Remove	Mat Bag	\$15.00	0	\$0.00	\$0.00 \$15.00

Sale Date: Jun 28, 2011

Payment Date: Jun 28, 2011

Notes:

Subtotal	\$112.00
Discount	\$0.00
	\$0.00
	\$0.00
Total	\$112.00

The value of the gift card will be applied as a payment toward the sale. Any balance outstanding can be paid using any other payment method. Any residual amount/balance will automatically be applied as an account payment item in the sale which can then be used for future purchases by the student.

NOTE: If the student wishes to redeem more than one gift card towards a sale, this can be achieved by firstly applying any additional gift cards towards an account payment (see Part 3 or this tutorial) then using that positive account balance to pay the remainder.

Part 3: Redeeming Gift Cards for an Account Payment

If a student does not wish to redeem their gift card toward a retail or yoga product, they can apply the gift card as an account payment.

NOTE: As gift cards do not expire, they could just as easily retain their gift card for use at a later date.

The process to redeem a gift card towards an account payment is exactly like redeeming it against a sale, however you will need to add an account payment item by clicking the *Accounts & Giftcards* button and entering a value as shown below.

The screenshot shows the 'Retail Sale' software interface. On the left, there are buttons for 'Products', 'Passes', and 'Accounts & Giftcards'. The 'Accounts & Giftcards' button is highlighted with a red arrow. In the center, there are two panels: 'Account Payment' and 'Purchase Giftcard'. The 'Account Payment' panel has a 'Payment Amount' field set to '100.00' and an 'Add' button. The 'Purchase Giftcard' panel has a 'Giftcard Amount' field set to '0.00' and an 'Add' button. Below these panels is a 'Payment' section with various payment methods: Cash, Check, Credit Card, Credit Card (offline), Gift Card, and On Account \$0.00. The 'On Account \$0.00' option is highlighted with a red arrow. To the right of the payment methods is a table with columns: Remove, Item, Price, %Discount, DiscountAmount, and Total. The table contains one row: 'Account Payment' with a price of \$100.00, 0% discount, and a total of \$100.00. Below the table are fields for 'Sales Date' and 'Payment Date', both set to 'Jun 28, 2011'. At the bottom right, there is a summary table with columns: Subtotal, Discount, and Total. The summary table shows: Subtotal \$100.00, Discount \$0.00, and Total \$100.00. At the bottom left, there is a 'Balance' field showing '\$100.00' in red, and a 'Change' field showing '\$0.00'. There are also 'Done' and 'Receipt & Done' buttons.

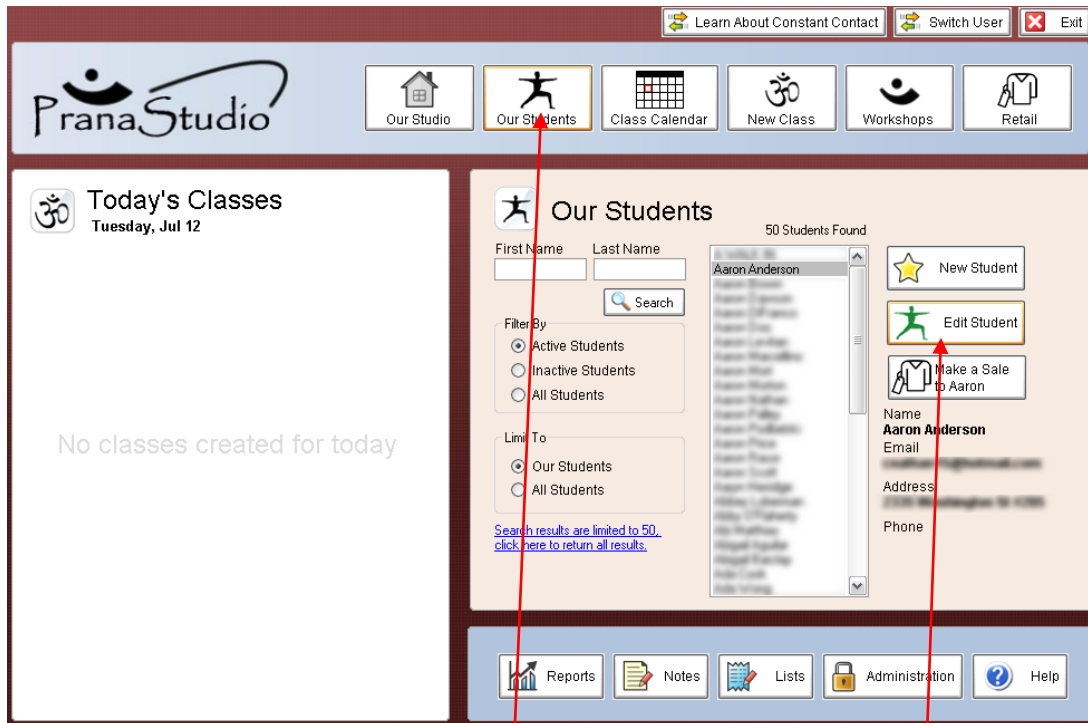
Once an account payment item has been added to the sale, you may apply the value of the gift card as a payment as per the instructions in Part 2 of this tutorial.

This positive student account balance can then be used for future purchases by the student by selecting the *On Account* payment method. The student's account balance (positive or negative) will always be displayed on this button.

Part 4: Reissuing Gift Cards

If a student misplaces their gift card, you may be able to issue them with a replacement gift card as long as it has not yet been redeemed. It is recommended that you only allow the purchaser of a gift card to request a reissue as well as verify their identity.

Step 1: Locate the purchaser's account



The screenshot displays the PranaStudio web application interface. At the top, there is a navigation bar with the PranaStudio logo and several menu items: 'Our Studio', 'Our Students', 'Class Calendar', 'New Class', 'Workshops', and 'Retail'. The 'Our Students' button is highlighted with a red arrow. Below the navigation bar, the main content area is divided into two sections. On the left, there is a 'Today's Classes' section for Tuesday, Jul 12, which states 'No classes created for today'. On the right, the 'Our Students' section shows a search interface with fields for 'First Name' and 'Last Name', a 'Search' button, and filter options. The 'Filter By' section has radio buttons for 'Active Students' (selected), 'Inactive Students', and 'All Students'. The 'Limit To' section has radio buttons for 'Our Students' (selected) and 'All Students'. A list of 50 students is displayed, with 'Aaron Anderson' selected. To the right of the list, there are buttons for 'New Student', 'Edit Student' (highlighted with a red arrow), and 'Make a Sale to Aaron'. Below the main content area, there is a footer bar with icons for 'Reports', 'Notes', 'Lists', 'Administration', and 'Help'.

From the home screen, click on the *Our Students* button located near the top of the screen. Type in the **purchaser's** (not recipient) name and click search. If the gift card was purchased at a different studio or if the purchaser is not an active student you may have to adjust the search options in the *Filter By* and *Limit To* boxes.

Once the purchaser is located, select them from the list and click on the *Edit Student* button.

Step 2: Locate the gift card order

Student

Done Cancel

First Name: Aaron
Last Name: Anderson
Gender: Male Female
Email: [redacted]
Do Not Contact:
Country: United States
Address: [redacted]
City: San Francisco
State: California
Zip Code: 94115

Experience Level: [redacted]
Classes: [redacted]
Date Created: Jan 1, 2011
First Class With Us: Jan 1, 2011

Person ID: [redacted]

Medical Notes: [redacted]
Make A Sale

Notes Passes Student Account **Purchase History** Deferred Payments Student Card Classes

Purchase History Show 5 Most Recent Purchases Only

Date	Sale ID	Total	Studio ID	Studio Name	Notes
July 12, 2011	1113	\$100.00	2	Blaze Yoga Studio	
January 25, 2011	[redacted]	\$100.00	2	Blaze Yoga Studio	
January 25, 2011	[redacted]	\$100.00	2	Blaze Yoga Studio	
January 13, 2011	[redacted]	\$100.00	2	Blaze Yoga Studio	

Sale Details Receipt Edit Sale

Item	Total	Status
Gift Card #GC123456	\$100.00	Sold

Click on the *Purchase History* tab to view the list of orders made by that student.

Locate the order which includes the gift card purchase. Note that you may need to uncheck the *Show 5 Most Recent Purchases Only* option if the gift card's order is not immediately visible.

Once the gift card order is located, select the order from the list and click on the *Edit Sale* button.

Step 3: Reissue the gift card

The screenshot shows the 'Edit Sale' window with the following details:

- Header:** Edit Sale (Done, Cancel)
- Purchased Items:** Sale ID: 1113, Sale Date: Jul 12, 2011. Buttons: Return Entire Sale, Return to Inventory (checked).
- Item Table:**

SKU	Item	Qty	Price	Discount	Total	
	Gift Card #GC123456	1	\$100.00	\$0.00	\$100.00	Reissue
- Summary Table:**

Subtotal	\$100.00
Discount	\$0.00
GST	\$0.00
PST	\$0.00
Sale Total	\$100.00
- Refund Section:**

Paid To Date	\$100.00
Deferred Payments	\$0.00
Returns Total	\$0.00
Refund Due	\$0.00

Refund Date: Jul 12, 2011
Refund Method: Cash
Refund Amount: \$0.00
Return Now (checked)
- Payments Table:**

Id	Scheduled Date	Received Date	Payment Method	Payment Type	Amount	Settlement Result	Message
1115	Jul 12, 11 12:52 PM	Jul 12, 11 12:52 PM	Cash	Customer Payment	\$100.00		

If the gift card has not been redeemed yet, a *Reissue* button will be visible next to the gift card item in the order. Click on this button to reissue the gift card.

Reissue giftcard?

This will invalidate the original card & allow you to issue a new one - are you sure you wish to proceed?

OK Cancel

A warning message will appear. Read this and click *OK* only if you wish to proceed with the reissue.



The gift card issue screen appears which will allow you to enter (or swipe) a new gift card.

If entering a gift card number manually, you will need to click *Done* when finished.

Please note that the value of the gift card may not be altered during a reissue.

Once complete, you may then close the windows and issue that new gift card to the customer.