Vision POS – Gift Certificates QRG

Purpose and Overview

This document provides the steps to process Gift Certificates using the Vision POS. The goal of this process is to digitally refund the Gift Certificate / Layaway in the amount that was taken and transfer those funds to the other store via a receipt voucher.

Each process will be broken down into two sections, one for the store selling the Gift Certificate, and another for the store redeeming the Gift Certificate.

Note: There is no change in the process of selling and redeeming Gift Certificates from Legacy to Legacy.

Select the appropriate section for your situation and follow the steps provided to process Gift Certificates.

ISSUING STORE	REDEEMING STORE
Legacy	Legacy
Vision	Vision

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Issuing Store – Legacy

Follow these steps when working in a store using the Legacy POS and you receive a call from another store that needs to redeem a Gift Certificate issued from your location.

Step	Action
1	From Invoice Sales, select Layaway Balance List.
2	Select the Customer entry.
3	Select Refund tab.
4	Type Salesman ID number.
5	Type the refund deposit amount in the cash payment type (even if the deposit was made with another payment type).
6	Select Transaction Final tab.
7	Complete a Cash Receipt Voucher transaction in the amount of the Gift Certificate using Cross-Store Layaway as the type. **Note:** Make sure to note the store redeeming the Gift Certificate in the comment line.
8	From Wizards, go to Receipt Vouchers.
9	Select Cross Store Layaway.
10	Type amount of deposit, date of deposit, customer information, and Layaway account number from the refunded Gift Certificate.
11	Print receipt voucher.

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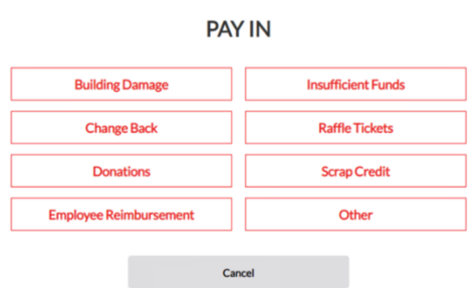
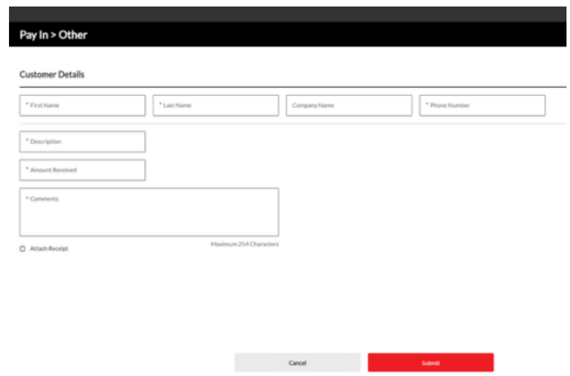
Issuing Store – Vision

Follow these steps when working in a store using the Vision POS and you receive a call from another store that needs to redeem a Gift Certificate issued from your location.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Pull up the sales order with the information provided by the store where the customer is attempting to redeem the Gift Certificate to validate the Gift Certificate information.</td></tr>
<tr><td>2</td><td>Once verified, delete this sales order which will refund this as cash.</td></tr>
<tr><td></td><td>Complete a Pay In Voucher to “Other” for the amount of deposit to offset this. Include the deleted sales order number and the store that is redeeming the Gift Certificate in the Comments field. See Vision POS – Creating Vouchers QRG for more information.





</td></tr>
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Redeeming Store – Legacy

Follow these steps when working in a store using the Legacy POS and you need to redeem a Gift Certificate issued from another location.

Step	Action
1	Call the issuing store with the Gift Certificate information and confirm there is an open sales order with the deposit.
2	Wait for the issuing store to clear the Gift Certificate from their system.
3	Once the issuing store has completed their process, go to Wizards, select Payment Vouchers, and then select Cross Store Layaway.
4	Type the Gift Certificate amount. Type the originating store number, sales order number, date of last deposit, and the customer information.
5	Print the payment voucher.
6	Complete an Invoice for products to be purchased.
7	Type the Gift Certificate amount in the Cash Payment field. Collect additional payment if needed.
8	Select Transaction Final. **Note:** 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.

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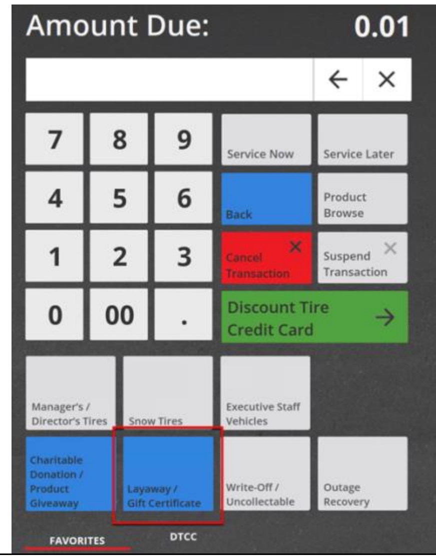
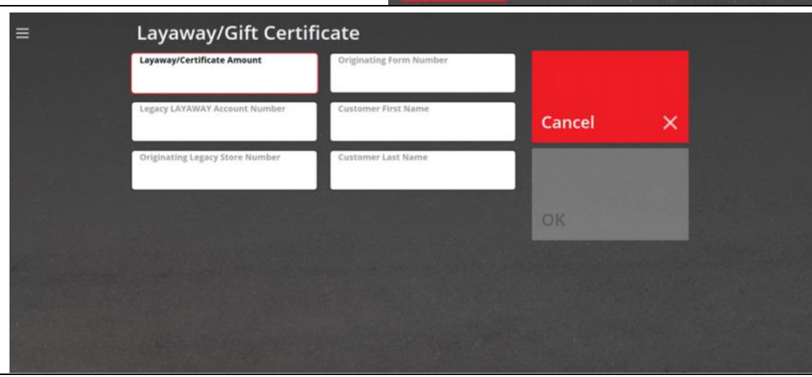
Redeeming Store – Vision

Follow these steps when working in a store using the Vision POS and you need to redeem a Gift Certificate issued from another location.

Step	Action
1	Call Legacy store to validate Gift Certificate provided by the customer.
2	Complete the sales process as normal until you get to the payment screen (if not already completed).
3	Use internal tender **Layaway / Gift Certificate** for the amount of the deposit. 
4	Fill out all required fields with the Customer and Originating Store information. 
5	**If the purchase amount is MORE than the Gift Certificate amount**, do a split payment with any other tender for the remaining amount. If there are **multiple Gift Certificates being redeemed**, only one payment should be applied at a time referencing the original layaway number. Repeat Steps 3 and 4 as needed for each redemption. **If the purchase amount is LESS than the Gift Certificate amount**, create a new Service Later for the remaining amount using labor code 80085. Once you checkout, use Internal Tender as Payment Type, Gift/Layaway, and enter remaining credit.

Contact

Contact the Service Desk at support@discounttire.com or 800-366-4399.

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