GIFT CARDS

The Gift Cards feature of LightSpeed allows you to sell and track gift cards for a variety of denominations and purposes, including the ability to adjust the card's balance for multiple uses.

1. In the Gift Card setup panel, you have the choice to enter your own gift card serial numbers, or to have LightSpeed generate its own serial numbers for your cards.

If you have gift cards that require serial numbers to be generated, select the first checkbox and choose the label size for the label on which you will print the serial number. Affix this label to the gift card; when the card is redeemed, you will scan this serial number for its retrieval from LightSpeed.

If your gift cards are already serialized, you will be asked to enter/swipe this number when you save the Invoice selling the Gift Card.
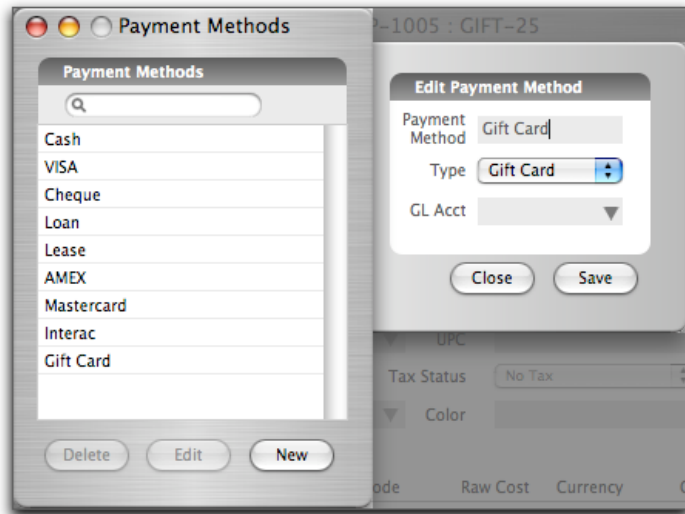
2. Create a new Product to reflect the Gift Card. It must be non-inventoried and non-serialized, and the Tax Status must be set to "No Tax", which will be the default settings when the Gift Card checkbox is checked. Set the Selling Price to the denomination of the Gift Card. Save the Product. You can create a new Product for each value of the Gift Cards you wish to sell. If you prefer, you can check the Editable Selling Price and Editable Description checkboxes and use the same Product for different denominations.

If you do Accounting Exports to MYOB or QuickBooks, choose the Gift Card Liability Account you have set up in your accounting software as the GL Income Account located in the GL tab.
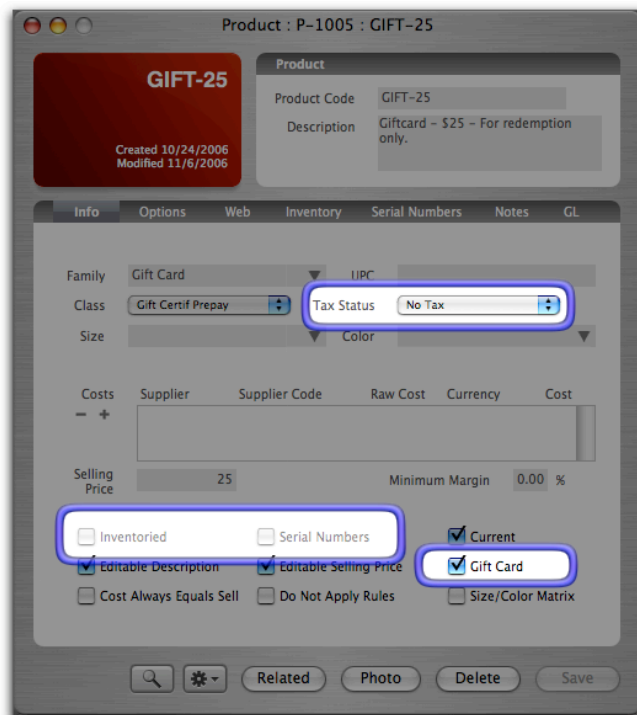
3. In Tools>Setup>Payment Methods, set up a Payment Method called "Gift Card". In the drop-down menu, select Gift Card. Again, if you do Accounting Exports, choose the GL Account that reflects your Gift Card Liability Account. This will be the same GL Account you assigned in the GL tab of the Gift Card Product profile (as outlined above). Click Save.

4. To sell the Gift Card, create a new Invoice and assign the purchasing Customer. Next, add the Gift Card Product. If you are editing the Selling Price, click the Price field and change it to the desired amount; otherwise, leave the amount as set in the profile. Click Save. If you have chosen "Generate Gift Card Serial Numbers" in the Gift Card setup panel, you will be asked if you wish to print the Gift Card label. Clicking OK will result in the label being printed, whch can then be affixed to the Gift Card. The serial number sequence will start at G-1000, and can be changed in Tools>Setup>ID Numbers. Once the Invoice is saved, you will be notified that the Gift Card has been activated.

You can now process the Payment. **Note:** The Payment Method of this Invoice will **not** be Gift Card – the purchasing Customer will pay by normal means – cash, cheque, or credit card.
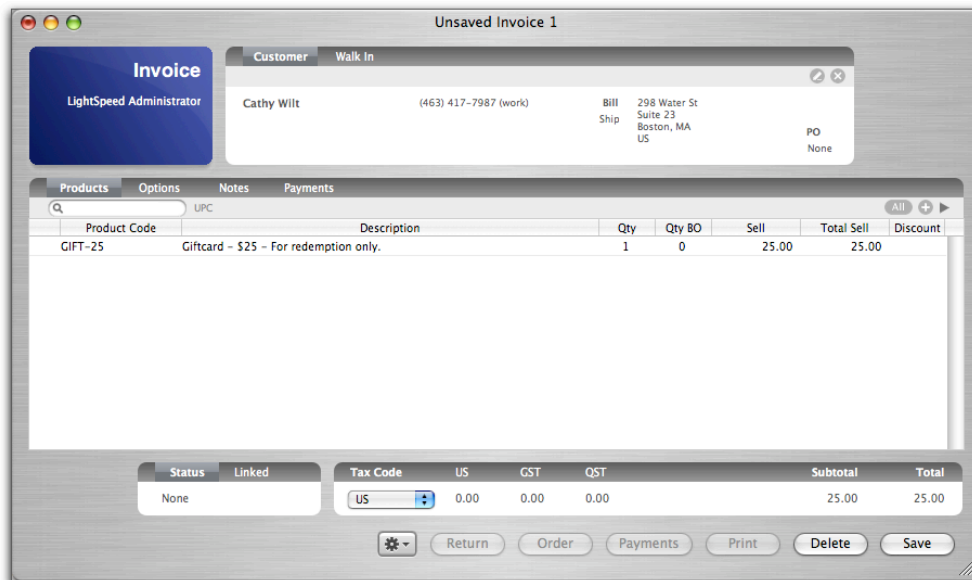
5. To redeem the Gift Card, create a new Invoice and attach the redeeming Customer. Add the Products the redeeming Customer is purchasing, and save the Invoice as you would normally. In the Payment screen, click the Gift Card button. You will be asked to enter/swipe the serial number for the Gift Card, and a window will appear asking you to indicate how much of the remaining balance on the Gift Card you wish to apply to this Invoice (similar to the procedure for applying credits).

If only part of the Gift Card balance is applied, the balance will remain on account for that serial number, and can be redeemed in the future using the same procedure.

Note: Payments made using Gift Cards will be exported with the normal Payment export to your accounting software. Both purchases and redemption of Gift Cards will affect the same GL Account when it is set in both the Gift Card Product profile and the Gift Card Payment Method.

To track the status and history of your Gift Cards, choose the Gift Cards option in the Tools menu. You will be able to check the status of a particular serial number and its remaining balance, as well as any sales documents to which it was applied. Pressing the All button will bring up all Gift Cards which can then be filtered based on whether they're active or inactive. You can use the Reprint button to reprint the label, or click History to open the History drawer to check a particular Gift Card's usage.