

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

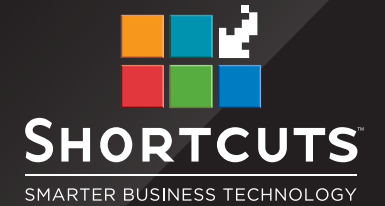
CLINIC

GIFT CARDS

REFUNDING A GIFT CARD BALANCE

HOME & MOBILE

BEAUTY



it suits you

Last updated 3 November 2016

By Erin Lewis

Product: Gift Cards

Software version no: 8.0.19.1

Document version no: 1.0

Country: Australia

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- SETTING UP A GIFT CARD REFUND SUNDRY ITEM..... 1**
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ABOUT THIS DOCUMENT

Currently, Shortcuts Gift Cards do not support the process of directly refunding a gift card balance (i.e. allowing clients to hand in their gift card and convert the remaining balance into cash). However, it is possible to refund a gift card balance using the method shown in this document. This method involves setting up a sundry item which the client pays for with their gift card, and then refunding the sundry item.

SETTING UP A GIFT CARD REFUND SUNDRY ITEM

You only need to set up the sundry item once. Once it has been set up, you can use it time and time again to refund gift card balances.

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **sales** setup menu.
- 4 Click on the **sundry income** icon.
- 5 Click on the **new** button.
- 6 Type in the name of the sundry item (e.g. gift card balance refund).
- 7 Click **done**.
- 8 Select **<exempt>** from the tax rate drop-down list.
- 9 Click **save**.

The screenshot displays the 'Sundry Income Setup' interface. On the left is a sidebar with navigation icons: Sales (3), Point Of Sale, Payment Types, Discounts, Receipt, Sundry Income (4), Expenses, Gift Certificates, Terminals, and Payment Processor. The main area is titled 'Sundry Income Setup' and contains the following fields: 'Gift Card Balance Refund' (dropdown), 'Description' (text area), 'Amount' (0), 'Tax Rate' (<Exempt> - 8), 'Sundry Type' (Sundry), 'Barcode' (0007Y), and 'External Id'. At the bottom of the main area are 'New' (5), 'Edit', and 'Save' (9) buttons. A modal dialog titled 'Sundry Income Name' is open, showing 'Sundry Name' with 'Gift Card Balance Refund' (6) entered. Below the modal are 'Done' (7) and 'Cancel' buttons. On the right side, there is a 'SHORTCUTS' menu with options: Main, Tools, Stock, Setup (1), Configuration (2), Employees, Employee Groups, Capabilities, Services, Series, and Contraindications. At the bottom right, there is a 'Done' button and a user profile for 'Anna Owner' with a 'Log Off' button.

SELLING THE GIFT CARD REFUND SUNDRY ITEM

The client will pay for the gift card refund sundry item using their gift card, thus removing the remaining balance from the gift card.

- 1 Click on the **main** menu.
- 2 Click on the **Point of Sale** icon.
- 3 Select the client so they appear at the Point of Sale.
- 4 Click on an empty sale line.
- 5 Select **sundry**.

Client Information: Alex Peters
 Club: VIP Club Exp: No Expiry
 Local Points: 0 / 0

Employee	Product/Service	Qty.	Price	Disc.	GST	Total

Summary:
 Discount: 0.00
 TIP: 0.00
 Sales Total: 0.00
 GST: 0.00
 Redemptions: 0.00
 Amount Owing: 0.00
 Payment Received: 0.00
 Change: 0.00

Shortcuts: Main (1), Arrivals, Walkin Manager, Point Of Sale (2), Clients, Performance, Exit, Tools, Stock, Setup, Anna Owner Log Off

Product or Service?

Product	Service	Sundry (5)	Account	Gift Card	Member
---------	---------	------------	---------	-----------	--------

6

Select the **gift card balance refund** sundry item that you set up earlier.

7

Click **done**.

Sundry Income

Gift Card	
Gift Card Balance Refund 6	
Gift Card Reload	
Green Fee	
Smiles for Starlight Donation	

Done

Cancel

Help

SHORTCUTS

5:18 PM
Wed, 2 Nov '16

Main

Tools

Stock

Setup

Configuration

Employees

Employee Groups

Capabilities


Services


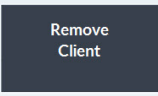
Series


Contraindications


Anna
Owner
Log Off

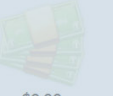
- 8 Click on the price cell for the sundry item.
- 9 Enter the value of the client's remaining gift card balance.
- 10 Click **done**.



Clients



Alex Peters
Club: VIP Club Exp: No Expiry
Local Points: 0 / 0




Trans# 31

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Anna	Sundry Income Gift Card Balance Refund	1	0.00	8	0.00	0.00


\$0.00


\$0.00


\$0.00


\$0.00

Discount

TIP

0.00

0.00

0.00


0.00


0.00


0.00


0.00

0.00


Card


End Sale


History


No Sale

Enter Amount

40

9

1	2	3
4	5	6
7	8	9
0	C	.

✓

10

Done

✕

10

Cancel


Configuration


Employees


Employee Groups


Capabilities



Services


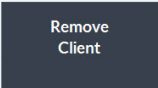

Series



Contraindications



Anna
 Owner
Log Off


- 11 Click on the **custom payment type** button.
- 12 Select the **gift card** option.
- 13 Scan the gift card.
- 14 Enter the full amount remaining on the gift card.
- 15 Click **done**.



 Clients



 Alex Peters
 Club: VIP Club Exp: No Expiry
 Local Points: 0 / 0



 Transactions

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Anna	Sundry Income Gift Card Balance Refund	1	40.00	0.00	0.00	40.00




\$0.00


\$0.00


\$0.00

Discount
 TIP


0.00
 0.00

Sales Total
GST
Redemptions
Amount Owing
Payment Received
Outstanding

Other Payment Type

Series Redemption	
Gift Card 12	
Loyalty	


 Cancel


Amount for Gift Card (Max \$40.00)


40.00

14

C

1	2	3
4	5	6
7	8	9
0	.	-









 Done


 Cancel

SHORTCUTS

9:02 AM
Thu, 3 Nov '16


Main


-  Appointments
-  Arrivals
-  Walkin Manager
-  Point Of Sale
-  Clients
-  Performance
-  Exit


16 The card's status will change to 'validated'. Click **done** to continue.

17 Click **end sale**.


18 Click **redeem** to collect the payment and update the balance on the gift card.


Clients


Alex Peters
Club: VIP Club Exp: No Expiry
Local Points: 0 / 0


Transactions

Remove Client

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Anna	Sundry Income Gift Card Balance Refund	1	40.00	0.00	0.00	40.00

\$0.00

\$0.00

\$0.00

\$0.00

\$40.00

\$0.00

Discount

TIP

Sales Total 40.00
 GST 0.00
 Redemptions 0.00
Amount Owing 40.00
 Payment Received 40.00
Change 0.00

Card

End Sale


History


No Sale

Enter Gift Card Payment(s)

Outstanding: \$0.00

Number	Balance	Amount	Status
6299740000149212365	\$40.00	\$40.00	Validated



Done



Cancel

Redeem Gift Card Payment(s)

Outstanding: \$0.00

Number	Balance	Amount	Status	Offline
6299740000149212365	\$40.00	\$40.00	Validated	<input type="checkbox"/>


Redeem


Cancel

 SHORTCUTS

9:18 AM
 Thu, 3 Nov '16

Main

Tools

Stock

Setup


Configuration


Employees


Employee Groups


Capabilities


Services


Series



Contraindications

 Anna
 Owner
 Log Off


REFUNDING THE TRANSACTION

Once you have sold the gift card refund sundry item, you can then refund the transaction.

1 While the client is still selected at the Point of Sale, click on the **history** button.




Clients




Alex Peters

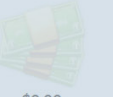
Club: **VIP Club** Exp: No Expiry
Local Points: 0 / 0


Remove Client

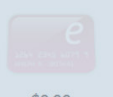


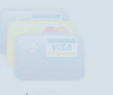
Trans# 1

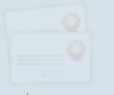
Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Anna	Sundry Income Gift Card Balance Refund	1	40.00	0.00	0.00	40.00



\$0.00


\$0.00


\$0.00


\$0.00


\$40.00


\$0.00

Discount 0.00

TIP 0.00

Sales Total 40.00


GST 0.00

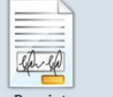
Redemptions 0.00


Amount Owing 40.00


Payment Received 40.00

Change 0.00


Card


Receipt


History


No Sale

SHORTCUTS

9:48 AM
Thu, 3 Nov '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

Tools

Stock

Setup

Anna Owner
Log Off

- 2 Right click on the **gift card balance refund** item that you just sold to the client.
- 3 Select **refund**.
- 4 A message will appear telling you that the transaction has been transferred to the Point of Sale. Click **done**.
- 5 Click **done** to return to the Point of Sale screen.

History for Alex Peters

History List	History Totals	Points
- Alex Peters (home: ???????? work: ???????? mobile: 0444000404)		
- Today		
	Gift Card \$40.00	\$40.00
Anna	<div style="display: flex; align-items: center;"> <div style="margin-right: 5px;">2</div> <div>Gift Card Balance Refund</div> <div style="margin-left: 10px; border: 1px solid #ccc; background-color: #333; color: white; padding: 2px;"> history </div> </div>	\$40.00
- Wed 2 Nov 2016		
	Cash \$100.00 Gift Card \$	
Anna	Gift Card	\$100.00
Anna	Mens Cuts Mens Style Cut	\$40.00
Anna	Mens Cuts Cut Throat Sha	\$20.00
- Tue 1 Nov 2016		
	Cash \$42.00	\$42.00
Anna	Mens Cuts Mens Style Cut	\$40.00
Anna	Movember Donation	\$2.00
- Tue 25 Oct 2016		
	Cash \$100.00	\$100.00

Visit Notes (0)
Clinic Notes (0)

Notes

Show only date with notes

Employee

Service

Date Range

New

Edit

View

Treatment

Print

Help

Visit Details

Done

SHORTCUTS
9:50 AM
Thu, 3 Nov '16

Main

Tools

Stock

Setup

Anna Owner
Log Off

Information - Shortcuts Point of Sale


i

Alex Peters has been Transferred to the Point Of Sale ready to complete the Transaction.


4


Done

- 6 Click **end sale**.
- 7 Select the payment type you wish to refund to.
- 8 Select the appropriate reason for the refund.
- 9 Click **done**.


Clients

Alex Peters
 Club: **VIP Club** Exp: No Expiry
 Local Points: 0 / 0

Remove Client

Trans# 1

Employee	Product/Service	Qty.	Price	Disc.	GST	Total
 Anna	Sundry Income Gift Card Balance Refund	-1	40.00	0.00	<Exempt>	-40.00

Discount

TIP

\$0.00

\$0.00

\$0.00

Sales Total

GST

Redemptions

Amount Owning

0.00

0.00

-40.00

0.00

-40.00

0.00

Card

End Sale

DEC

End Sale

6

Select Payment Type to Refund To

Cash
Account
Amex
Visa
MasterCard
EFTPOS
Gift Card
Loyalty

X

Cancel

Refund Information

You are Refunding a Gift Card Balance Refund

Select a Reason for the Refund

Other

✓

Done



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