



LEADERS HOLDING CO.TM

Est. 1971

Gift Certificates

Gift Certificates can be bought as a gift or for personal use. The gift certificate's value must be associated with the seven-digit number on the back of a Leaders Gift Certificate.

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Selling a Gift Certificate

The gift certificate should be sold under the account of the person paying for the gift certificate. During the selling process, you can assign the gift certificate to a recipient.

1. In NetSuite, find the customer account for the person buying the gift certificate. If they do not have a customer record create one.
2. Write a New Sale sale like you would for regular product
3. Complete "1. Primary Information"
4. Enter "Gift Certificate" as a line item
5. Fill out the value of the gift card in the amount field.

The screenshot shows the 'Items' tab in NetSuite. At the top, there are tabs for '2. Items', '3. Shipping/Billing/Signature', 'Communication', 'Delivery Information', 'System Information', and 'Promotions'. Below these, there's a 'SHIP COMPLETE' checkbox and an 'ESTIMATED READY DATE' field set to '05/19/2031'. There are also links for 'If No Stock in DC / PO Forecast' and 'If No Stock in Distribution Center / Reserve Store Stock'. The main table has columns: ITEM, DESCRIPTION, QUANTITY, PRICE LEVEL, EACH, ESTIMATED AVAILABILITY DATE, AMOUNT, COMMIT STATUS, and RESERVE FROM / CURRENT ITEM(S) LOCATION. The first row is 'Gift Certificate' with a quantity of 1.00. The 'AMOUNT' field is highlighted in yellow. A red arrow points to the 'Gift Certificate' text in the 'ITEM' column, and another red arrow points to the 'AMOUNT' field.

6. On the right side of the Gift Certificate line item, click in the Gift Certificate box.


This is a close-up of the 'Gift Certificate' line item. It shows a table with columns: SCHEDULE DELIVERY METHOD, SCHEDULE DELIVERY RECORD, TAX, SPECIAL ORDER, COMMIT, OPTIONS, GIFT CERTIFICATE, RELATED ORDER, BXX SERVICE ITEM, and CLOSED. The 'GIFT CERTIFICATE' column is highlighted in yellow. A red arrow points to the 'GIFT CERTIFICATE' column header. Below the header, there's a text input field with the placeholder '<Type then tab>'. The 'RELATED ORDER' column also has a similar placeholder.

7. Fill out the window that pops up as follows

| | |
|-------------------------------------|--|
| From | Person Giving Card |
| Recipient Name | Person Receiving Card |
| Recipient Email | Recipients Email |
| Gift Message | Message from giver to recipient. This will print in the email sent to the recipient. |
| Code | 7 Digit Code on the back of the gift certificate you are issuing |
| <input type="button" value="Done"/> | |

| | |
|--|--|
| This Gift Card can be redeemed for merchandise or services at Leaders Casual Furniture® stores and cannot be redeemed for cash or credit except where required by law. For further information please contact Customer Service @ 877-538-5783 (toll free) or 727-538-5783 (local). | For: |
| | Value: \$ |
| |  0001979 |

8. Write the recipient's name in the "For" box.
- This is a gift, please take care and write neatly. Let it dry before handling it to prevent smudging.
9. Write the Gift Certificate Value in the "Value" box
- This is a gift, please take care and write neatly. Let it dry before handling it to prevent smudging.

| | |
|--|---|
| This Gift Card can be redeemed for merchandise or services at Leaders Casual Furniture® stores and cannot be redeemed for cash or credit except where required by law. For further information please contact Customer Service @ 877-538-5783 (toll free) or 727-538-5783 (local). | For: Maria and Robin Gonzalez |
| | Value: \$ 1,000 |
| |  0001979 |

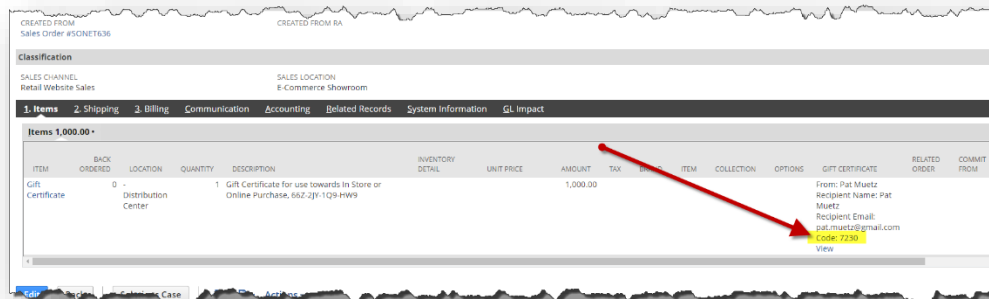
10. Complete the Sales Order and **Save**
- a. The delivery method should be "Customer Pick-Up In-Store."
11. Click **Take Payment** on the top of the sales order. Pay the gift card in full.
12. You can **Bill** and Invoice the Sales Order if it does not have any other items on it, or you can wait till the automatic process happens once every six hours.

The screenshot shows a web interface for a Sales Order. At the top, it says "Sales Order" with a search icon. Below that, the order number "SOWHS3325" and customer name "91126 Saturday BeachHouse" are displayed. A "PENDING BILLING" status tag is visible. A row of buttons includes "Edit", "Back", "Bill", "Close Order", "Take Payment", and "Recalculate Date Available". A red arrow points to the "Bill" button. The form is divided into sections: "1. Primary Information" containing fields for DATE (02/27/2021), ORDER # (SOWHS3325), CUSTOMER (91126 Saturday BeachHouse), PHONE NUMBER ((727) 244-9448), LOCATION (-Distribution Center), SALES REP (Tim Newton), and checkboxes for SPLIT SALE, ITEM(S) READY TO DELIVER, ELIGIBLE FOR COMMISSION (checked), and SPECIAL ORDER ON HOLD. It also shows BALANCE DUE (0.00) and AMOUNT PAID (100.00). The "Order Information" section at the bottom includes a CUSTOMER MESSAGE, CUSTOMER REFERENCE #, DELIVERY RECORDS, and options for CREATED FROM OPPORTUNITY or RETURN AUTHORIZATION (RA).

A Gift Certificate will not be active until it is billed and invoiced.

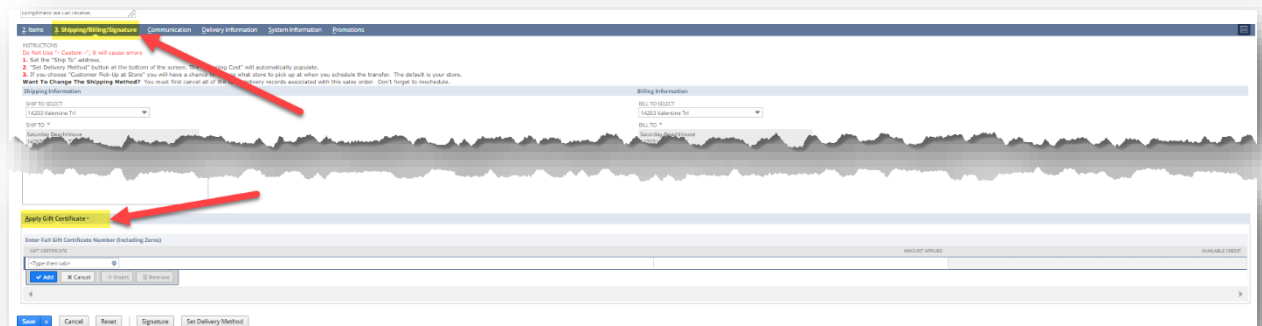
Redeeming

To redeem a Gift Certificate, you will need the Gift Certificate number that can be found on the sales order where the gift card was sold in NetSuite. Gift Certificates can only be applied to Sales Orders in Edit mode.



| ITEM | BACK ORDERED | LOCATION | QUANTITY | DESCRIPTION | INVENTORY DETAIL | UNIT PRICE | AMOUNT | TAX | ITEM | COLLECTION | OPTIONS | GIFT CERTIFICATE | RELATED ORDER | COMMIT FROM |
|------------------|--------------|---------------------|----------|---|------------------|------------|----------|-----|------|------------|---------|--|---------------|-------------|
| Gift Certificate | 0 | Distribution Center | 1 | Gift Certificate for use towards In Store or Online Purchase. 662-2JY-1Q9-HW9 | | | 1,000.00 | | | | | From: Pat Muetz Recipient Name: Pat Muetz Recipient Email: pat.muetz@gmail.com Code: 729K | | View |

1. Write a Sales Order for product as you would normally.
2. On the tab 3. Shipping/Billing/Signatures, at the bottom, is the Gift Certificate section.



Shipping/Billing/Signatures

Enter Full Gift Certificate Number (including Serial)

Gift Certificate

Add Cancel Insert Remove

3. Fill out the Apply Gift Certificate fields
 - a. Enter the code on the back of the gift card



- b. Enter the amount you would like to apply to the Sales Order from the Gift Certificate. It can be the full amount of the gift card or any amount less than the total.
 - c. Available Credit is the amount of funds still available on the Gift Card after the amount you would like use for this transaction. Unused funds will stay on the Gift Certificate
 - i. Cross out the original amount on the card and write this new value on the back.
 - d. Click ✓ Add to save

Apply Gift Certificate •

Enter Full Gift Certificate Number (Including Zeros)

| GIFT CERTIFICATE | AMOUNT APPLIED | AVAILABLE CREDIT |
|------------------------|----------------------|----------------------|
| 0000002 a | 20.00 b | 50.00 c |

✓ Add ✗ Cancel ➕ Insert ➖ Remove

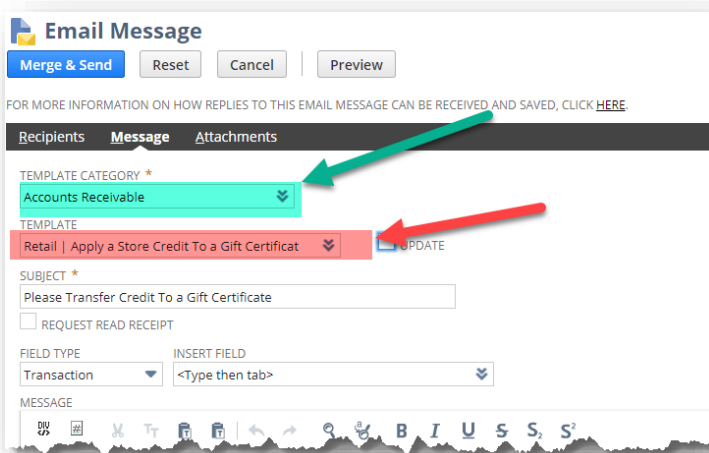
d

4. Finish entering all of the information on the Sales Order and click Save

Issuing a Gift Card for In-Store Credit

The sales team can create in-store credits by creating Return Authorizations and fulfilling them. Because of automation limitations, sales team members cannot apply these credits to a Sales Order. Please send the "Retail | Apply a Store Credit To a Gift Certificate" email template from the Sales Order you wrote the gift certificate on.

1. Complete a return. Once the return is received and in inventory the Credit Memo will show status "Fully Applied" and a credit will be on the account.
2. Write a sales order for a Gift Certificate and save it.
3. Issue the Gift Certificate as outline in this section above.
4. From the Sales Order, you wrote the Gift Certificate on, send the email template
 - a. Template Category: Accounts Receivable
 - b. Template: Retail | Apply a Store Credit To a Gift Certificate



Email Message

Merge & Send Reset Cancel Preview

FOR MORE INFORMATION ON HOW REPLIES TO THIS EMAIL MESSAGE CAN BE RECEIVED AND SAVED, CLICK [HERE](#)

Recipients **Message** Attachments

TEMPLATE CATEGORY *
Accounts Receivable

TEMPLATE
Retail | Apply a Store Credit To a Gift Certificat UPDATE

SUBJECT *
Please Transfer Credit To a Gift Certificate

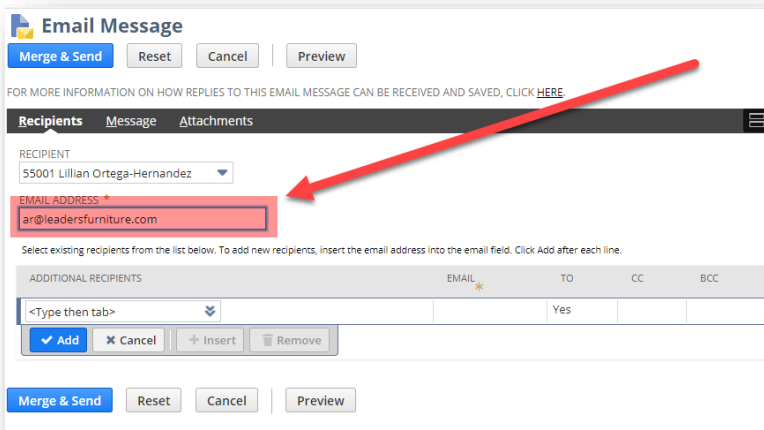
☐ REQUEST READ RECEIPT

FIELD TYPE INSERT FIELD
Transaction <Type then tab>

MESSAGE

Rich text editor toolbar with icons for bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, undo, redo, and text color.

- c. Be sure to erase the customer's email address and type in ar@leadersfurniture.com



Email Message

Merge & Send Reset Cancel Preview

FOR MORE INFORMATION ON HOW REPLIES TO THIS EMAIL MESSAGE CAN BE RECEIVED AND SAVED, CLICK [HERE](#)

Recipients **Message** Attachments

RECIPIENT
55001 Lillian Ortega-Hernandez

EMAIL ADDRESS *
ar@leadersfurniture.com

Select existing recipients from the list below. To add new recipients, insert the email address into the email field. Click Add after each line.

| ADDITIONAL RECIPIENTS | EMAIL * | TO | CC | BCC |
|-----------------------|---------|-----|----|-----|
| <Type then tab> | | Yes | | |

✓ Add ✕ Cancel ➕ Insert ➖ Remove

Merge & Send Reset Cancel Preview

5. Click Merge & Send