

Sell a gift certificate – Use TP Phone Sales as MOS

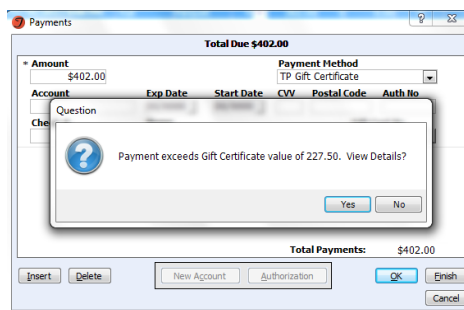
1. Enter a patron into the account
2. Enter a “source”
3. Choose a Delivery Method
4. Ask patron if they want a message (use notes for one line messages, use CSI for up to 3 lines)
5. Click the MoneyBags
6. Use “TP Gift Certificate” payment method
7. Enter the desired amount in the Amount box. This should be entered in as a negative amount. (e.g. \$-100.00). This will populate a number in the GC Number box.
8. Click “Insert” (the amount box will automatically populate with the amount of the GC)
9. Use “TP Visa/Amex/Etc.” payment method
10. Authorize the credit card.
11. Check to be sure that “total payments” = \$0.00
12. Read the patron the GC number WITH DASHES
13. Click “Done” on order
14. To get order #, click “Orders -> Load Last Order”

Redeem a Gift Certificate

1. Go to the money bags.
2. Chose “TP Gift Certificate” as the payment method.
3. Enter the Gift Certificate number **with the dash**.
4. Click OK.
5. Click done.
6. Reload the order to give remaining balance for Gift Certificate. (Go to order history and click on the chicklet to see remaining balance).

If the amount due exceeds the remainder of the Gift Certificate...

1. A dialog box will appear saying the amount of the Gift Certificate has been exceeded.



2. Enter the remaining Gift Certificate value in the amount box.
3. Select Insert in the bottom left corner of the “Payments” window.
4. Select the payment method the patron wishes to use for the remaining balance.
5. Enter all credit card information and select authorize.
6. Select “Done”.

Check the value of a gift certificate

If you can find the original GC purchase order...

1. Go to the “order history” tab
2. Scroll to the right, click on the chicklet next to the GC number

If you only have the GC number...

1. In the constituent search screen, do an “advanced” search for “Gift Certificate No.” equal to (enter GC number)

2. The search will show a list of every patron who has had a transaction with that GC number, including the original purchase order as well as every purchase made *with* that GC.
3. Double-click on any of the patron listings to open their account details.
4. Go to the “Transactions” tab.
5. Select the “Payment” radio button.
6. You will see a list of every payment that patron has ever completed. This **INCLUDES** payments to and from a gift certificate.
7. Look for your GC# in the “Gift Certificate No.” column – which is blank for payments that did not involve a GC. *See screenshot, below.*

General	Names	Contact Details	Plans	Relationships	Research		
History	Connections	Contributions	Transactions	Ticket History	Orders		
<div><input type="radio"/> Transactions <input checked="" type="radio"/> Payments <input type="radio"/> Seat History <input type="radio"/> Credit Cards <input type="radio"/> Audit <input type="radio"/> SEPA Direct Debits</div>							
Payment Type	Payment Method	Amount	Payment Date	Transaction	Gift Certificate	Account	Check No
Marion Baider							
Credit Card	POPS-TP VISA (Sub Serv)	\$330.00	4/25/2014 16:34	7367994		****_****_****-1855	
Check	POPS-TP Check Corr. (Sub !	(\$330.00)	4/24/2014 15:10	7363478			2167
Check	POPS-TP Check (Sub Serv)	\$330.00	4/10/2014 10:53	7333851			2167
Gift Certificate	TP Gift Certificate	\$50.00	4/10/2014 10:52	7333851	BDFC-3723273		
Gift Certificate	TP Gift Certificate	(\$50.00)	3/17/2014 17:14	7263832	BDFC-3723273		
Other	TP Cust Service Refund	\$50.00	3/17/2014 17:08	7263832			
Credit Card	TP 2VISA (Call Center)	\$20.00	3/14/2014 17:38	7255482		****_****_****-6815	
Credit Card	POPS-TP VISA (C.C.)	\$161.00	3/14/2014 12:52	7253234		****_****_****-6815	
Marion Baider		\$561.00					

Enter a CSI – for gift certificate and reprint/change-name requests

1. In the “Consituents” screen, navigate to the “Connections” tab
2. Make sure the “Customer Service” radio button is selected
3. Click “add” in the lower left corner
4. Choose “inbound phone” for contact method
5. Use the following categories - “TP Gift Certificate”
6. Use the following activity types -
 - a. For GC message that is longer than one line use – “TP Gift Cert Message”
 - b. If a patron calls saying a GC was not received please use – “TP Gift Cert Not Rcv’d”
7. Enter message into the **notes** field – this should not be more than 3 lines.
8. Save and close.

Selling a Gift Certificate with FedEx Delivery Method

1. Once in the patron’s account enter the appropriate Source Code.
2. Select the Fed Ex delivery option.
3. Go to the Fees tab

Line Items	Sub Line Items	Fees	Contributions	Custom Data
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and select

Add

4. Choose fee type “14 Fed Ex Fee Gift Certs” and click “OK”.

Add User Defined Fee

Fee: 14 FedEx Fee Gift Certs

Fee Amount: 25.00

Override Ind: ☐

Override Amt: 0.00

Fee Text:

OK Cancel

This will populate a line item on the fees page and the fee can be seen in the fees box at the bottom of the screen. There will be no line item visible on the Line Items tab.

5. Click the “Moneybags”.
6. Use “TP Gift Certificate” payment method.
7. Enter the desired amount in the Amount box. This should be entered in as a negative amount. (e.g. \$-100.00). This will populate a number in the GC Number box.
8. Click “Insert”(the amount box will automatically populate with the amount of the GC and the Fed Ex fee).
9. Use “TP Visa/Amex/Etc.” payment method
10. Authorize the credit card.
11. Check to be sure that “total payments” = \$0.00
12. Read the patron the GC number WITH DASHES

13. Click “Done” on order

14. To get order #, click “Orders -> Load Last Order”