



[TIPS & TRICKS]

Managing Gift Certificates.

Prerequisite:

1. In the Section Admin, Products, Misc. Products, Categories, you need to create a category called Gift Certificate.
2. In the Section Admin, Products, Suppliers, create a supplier named Clinic, if it doesn't already exist.
3. In the section Brands, Misc. Products, add the brand " - " to your Clinic supplier, if it doesn't exist.
4. In the section Products, Misc. Products, create a new product called Gift Certificate. This product needs to have Clinic as a supplier with the brand " - " and the category Gift Certificate. Do not put a Unit Price as it is unnecessary.

How to sell a Gift Certificate

In an Invoice add a Misc. Product "Gift Certificate". In the Detail window, insert the Unit Price.

Type	Misc. Product
Detail	Group - Gift Certificate, Gift Certificate
Detail	
Item no	
Description	Gift Certificate
Quantity	1
Unit Price	\$2.00
Sub Total	\$2.00
Discount	
Tax 1	<input type="checkbox"/> \$0.00
Tax 2	<input type="checkbox"/> \$0.00
Total	\$2.00
Payment	\$2.00
Balance	\$0.00
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Office	
Assistant	

How to apply a Gift Certificate as a payment mode

1. In the menu Admin, select Invoicing and Payment Methods. Create a new Payment Method called Gift Certificate. Verify that the « Included in cash » box is not checked.
2. Apply the payment method to the Invoice and Save.

Payment - Last Name, First Name	
Company	001 Company 001
Date	02/06/2009
Payer	Patient
Payment Method	Gift Certificate
Amount	\$150.00
Note	