Using Gift Cards and Discounts

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Overview

If you use gift cards or gift certificates as part of your business, you can adapt this practice by creating a **Part** to stand in place of the gift. This can work like a **Credit Memo**. We also suggest using notes on the Proposal and the Contact to remind yourself that a gift card/certification was used. This is also a similar method to offering customers **Discounts**.

If you want to track the gifts for marketing or reporting purposes, you may want to use the **Part** method. Use the **Part Summary** report to see details on when gift cards/certifications are used. This also works the same way for discounts.

Create A Part

Create a **Part** that is named **Gift Certificate**, and use it to apply a discount. Go to Control **Panel > Parts > Add**. The part itself would have a price of \$0, unless you know you only provide \$50 gift cards. Then the **Unit Price** should be set at -\$50.

You can do the same thing for discounts, and you can have as many as you would like. However, we strongly suggest that you keep your list of parts as simplified as possible. Only having 3 discounts is easier to remember than having 20 discounts, as an example.

You will want to Exclude from royalty reporting for this part.



Add To Proposal

Send a proposal to the person purchasing using the gift certificate (make sure you are requiring a 100% deposit on the proposal) then generate the invoice directly from there. Add a note to the invoice that it is a gift certificate for the customer. You can also add a note to the contact's profile that they have a credit and include the invoice number for reference.

Then add the **Gift Certificate** part at the end of the proposal. If the part has a \$0 amount, you can either enter a negative dollar amount for the **Rate** or type the discount percentage into the quantity column.

Option	Item	Description	Quantity	Rate	Amount
Select a template V	Basic Build	I'm going to build something fabulous in your abode. $\hfill \ell$	1	0	\$0.00
-option-	Example Part 1	Example Part 1	1	150	\$150.00
-option-	Example Part 2	Example Part 2	<i>b</i> 1	225	\$225.00
-option-	Example Part 3	Example Part 3	<i>[i</i>	75	\$75.00
-option-	Gift Certificate	Gift Certificate	// 100%	0	\$0.00

When you press enter, the **Amount** changes to a negative value and the total amount due is \$0.

Option	Item	Description	Quantity	Rate A	mount
Select a template ▼	Basic Build The State St	I'm going to build something fabulous in your abode.	<i>[</i>	0	\$0.00
		1			
-option-	Example Part 1	Example Part 1	// 1	150 \$	150.00
-option-	Example Part 2	Example Part 2	1	225 \$2	225.00
		1			
-option-	Example Part 3	Example Part 3	1	75	\$75.00
		/			
-option-	Gift Certificate	Gift Certificate	1	-\$4	450.00
		· · · · · · · · · · · · · · · · · · ·			
-option-	-part-	Search			
			Subtotal		\$0.00
			Tax		\$0.00
			Total		\$0.00

Reporting

Use the **Part Summary** report (org-level report) to see how often and who the gift card/gift certificate/discount was used for.

FAQs

Does this bypass the step to "schedule" this proposal?

Scheduling can still be performed from the proposal after acceptance.

What if the discount is more than the total cost of the job? Will I need to manually track how much of the credit they've used or can I set up a credit memo once this invoice is paid and use that credit to pay for each service moving forward?

A credit memo will keep track of the remaining amount. Create a credit memo of the overpayment, then you can go through and apply that to the invoices you want it on. If you are making a payment and it's over the balance of that invoice, then check that box to **Apply Excess to Other Invoices**, which will allow any other open invoices to be paid.



How do I apply a 50% discount on a proposal?

For percentage discounts you create the part that you will put on the proposal with a \$0 Unit Price, then you designate the value of the discount on the proposal itself by typing the percentage into the Quantity field.

You can create a part that always applies a consistent dollar amount discount (i.e., \$10 off) by typing a negative value into the Unit Price, but for percentages you have to enter the value of the discount on the proposal because the Unit Price field for Parts does not accept a percentage as a value.