

# Vouchers

2016 - Fall Edition

## User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Office Setup](#)

[Accessing the Tool](#)

[Credit Item Setup](#)

[Voucher Item\(s\) \(Redeemed\) Setup](#)

[Voucher \(Package\) Item Setup](#)

[POS - Voucher Sale and Redemption](#)

[Voucher Sale](#)

[Voucher Redemption](#)

[Best Practices](#)

[Common Questions and Concerns](#)

[When is Revenue recognized in the system?](#)

[What if I add a new Voucher Item to the Voucher Package after initial setup and sale?](#)

# Overview

A Voucher provides a mechanism for a Club to sell an item through the POS system that can later be redeemed for goods or services. The Office Accounting system as well as the POS are utilized to ensure Vouchers are set up properly, sold, and redeemed in accordance with the Voucher specifications.

## Use Case(s)

A Member bought a package of (10) 1-hour golf lessons today at the Pro Shop, and looks forward to redeeming them (approximately one lesson a week) for the next three months.

## Office Setup

For the voucher process to work properly, the appropriate Items must be set up in the system, and linked properly within the voucher setup.

(1) **Voucher (Package) Item** - Item initially sold

Example: Package of (10) 1-hour lessons; Retail Price is \$800.00

(2) **Voucher Item** (Redeemed) - Single Item of the Package redeemed

Example: (1) 1-hour lesson; Retail Price is \$80.00

(3) **Credit Item** - Offset to the Redeemed Item

Example: (1) Lesson Credit; Retail Price is (\$80.00)

When Member purchases initial package, Member pays \$800.00 up front for the **Voucher (Package) Item**.

When Member takes their first lesson, Member pays \$0.00, and (1) Voucher is used. **Voucher Item** (Redeemed) \$80 + **Credit Item** (\$80) = \$0 due at time of lesson.

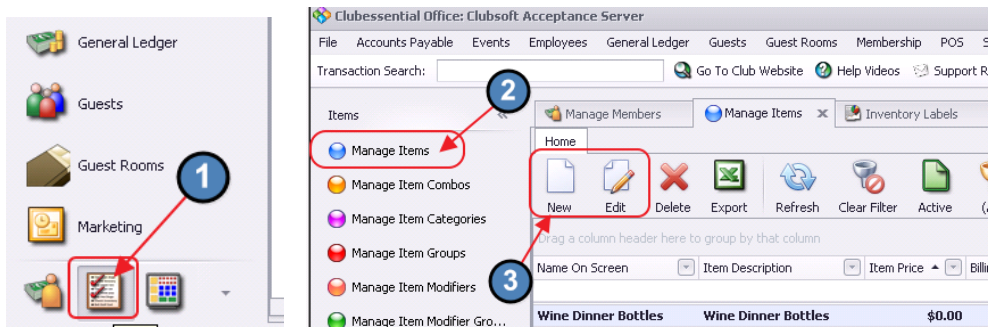
*Key points to remember during the setup:*

- Once a voucher is sold, changes to the voucher setup will not affect vouchers previously sold. Only vouchers sold after that change will contain the new setup.

## Accessing the Tool

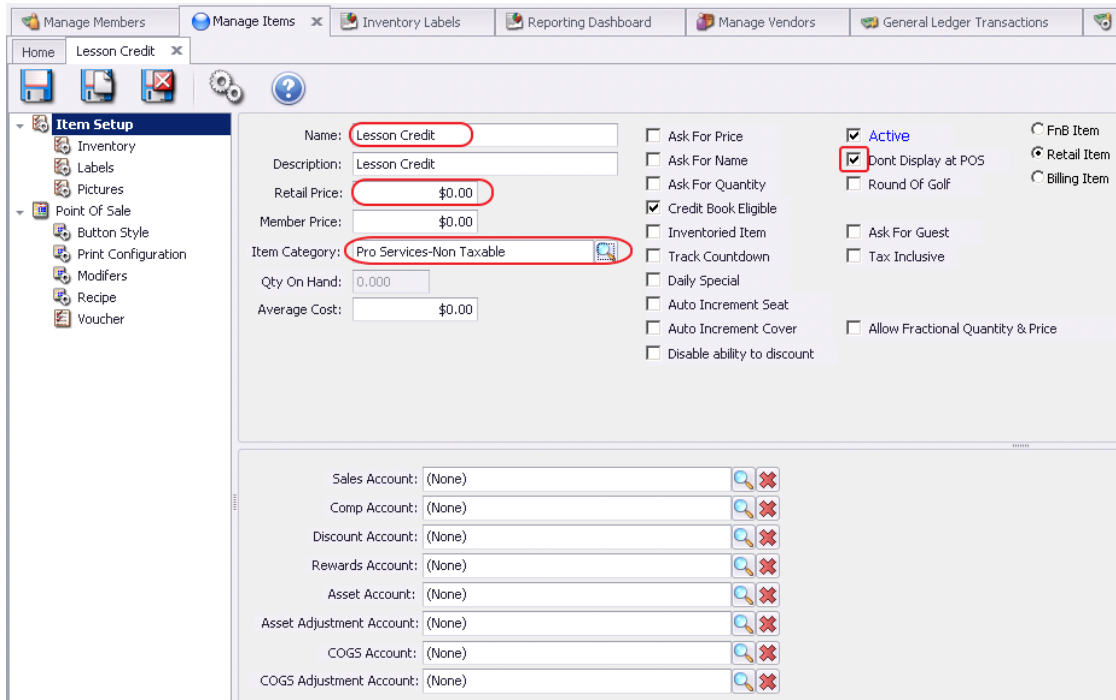
Prior to building the **Voucher (Package) Item**, the **Credit Item** and the **Voucher Item(s) (Redeemed)** must exist, as they are utilized in the **Voucher (Package) Item** setup.

Navigate to **Items, Manage Items**, and click **New** to create or **Edit** to use existing Items in the process documented below.

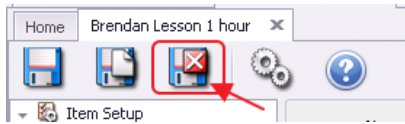


## Credit Item Setup

First, create the **Credit Item**. Create Credit Item as regular POS item; however, **set the Price to \$0.00**. Set the **Item Category** to the same Category as the **Voucher Items (Redeemed)** to ensure the default GL and Tax Codes match. It is appropriate to click the **Don't Display at POS** because this Item will be automatically attached, and not sold individually.



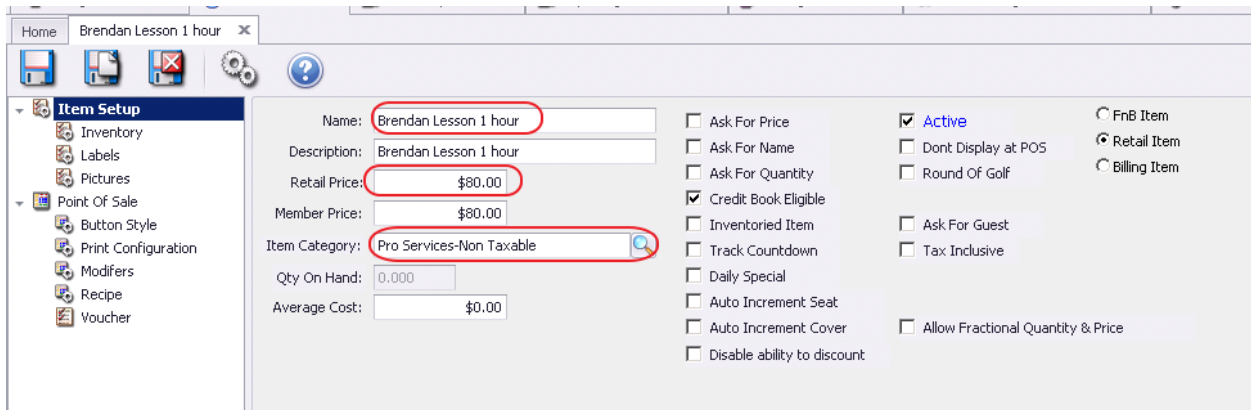
When finished, click **Save and Close**.



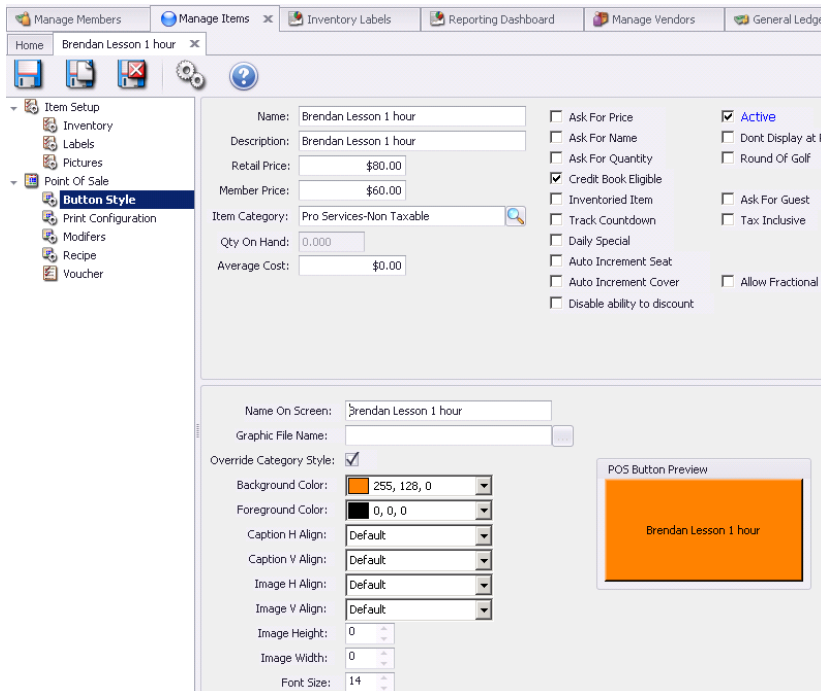
### Voucher Item(s) (Redeemed) Setup

Next, create the **Voucher Item(s) (Redeemed)**. Create Voucher Item(s) that will be redeemed as regular POS item(s). In instances where a (1) hour lesson or (2) ½ hour lessons would equate to (1) unit of the Voucher, ensure Items exist for both the 1 hour lesson, and the ½ hour lesson.

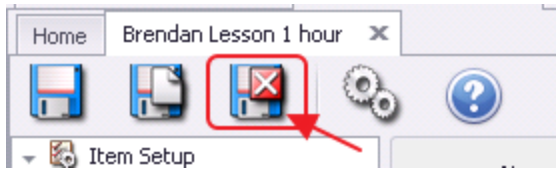
Enter a Name, Price and Category. Category needs to match Voucher Credit Category.



Additionally, **Button Options** may be saved so that the Item is available on the POS screen.



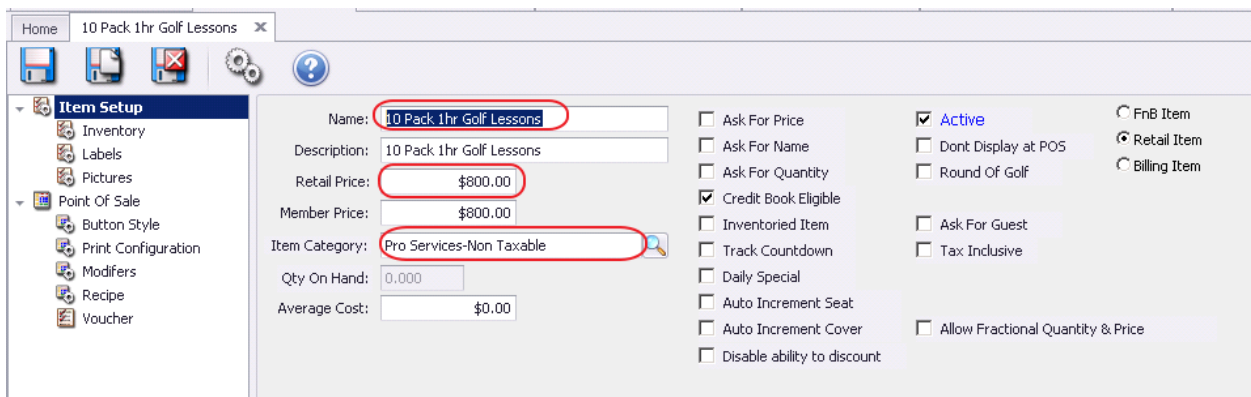
When complete, click **Save and Close**.



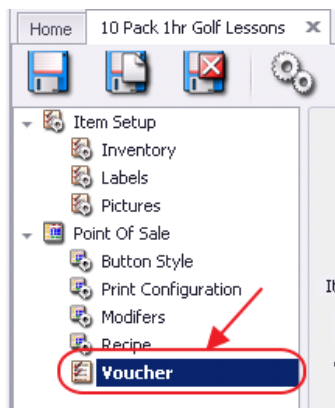
### Voucher (Package) Item Setup

Finally, create the **Voucher (Package) Item**. Create Voucher (Package) Item as regular POS item; however, **set the Price to the total amount of the Package**. In this example, a 10 pack of lessons costs \$800.00.

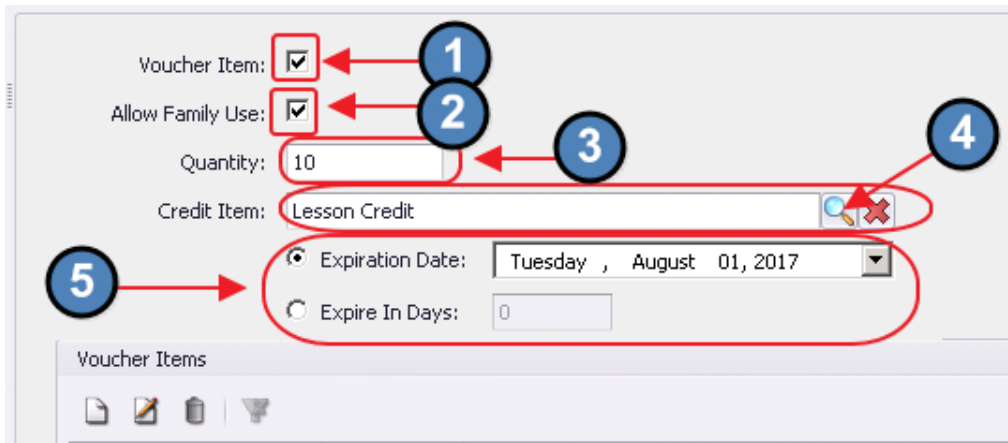
Enter a Name, Price and Category. Again, Category should match other Items created.



Then, click on the **Voucher** tab for the Item.



Designate the Item as a **Voucher**. Indicate whether the Voucher can be utilized by **Family** Members. Indicate the number of vouchers or **quantity** that will be included in this Voucher package. Designate the **Credit Item** (previously set up). Enter an **Expiration**, either based on a specific date, or based on number of days from purchase.

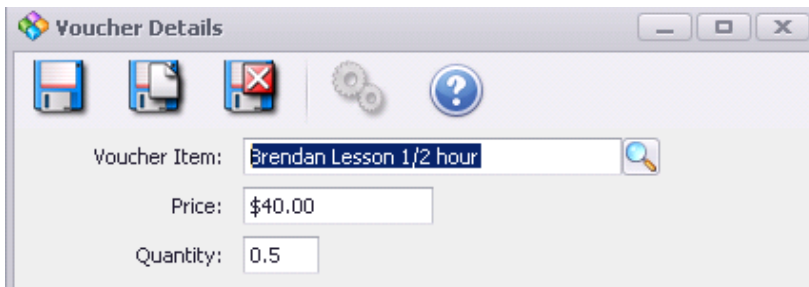


Next, attach the **Voucher Items (Redeemed)** that were also previously built. To do, click the **New** button. Select the **Voucher Item (Redeemed)**, enter **price**, and **quantity** assigned. Then, click **Save and Close**.



Attach additional Items as necessary by repeating the above.

For example, setup for a ½ hour lesson could look as follows.

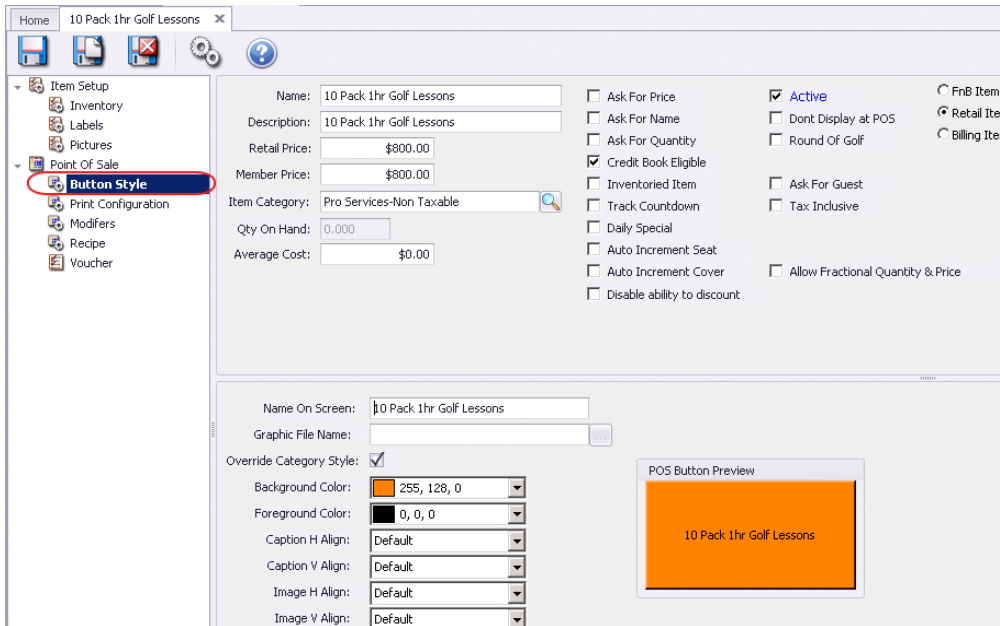


Once attached, Voucher Items will be listed in the Voucher grid.

Voucher Item	Quantity
Brendan Lesson 1/2 hour	0.5
Brendan Lesson 1 hour	1

2 of 2 records found.

Additionally, **Button Options** may be saved so that the Voucher Package Item is available on the POS screen.



Home 10 Pack 1hr Golf Lessons

Item Setup

- Inventory
- Labels
- Pictures
- Point Of Sale
  - Button Style**
  - Print Configuration
  - Modifiers
  - Recipe
  - Voucher

Name: 10 Pack 1hr Golf Lessons

Description: 10 Pack 1hr Golf Lessons

Retail Price: \$800.00

Member Price: \$800.00

Item Category: Pro Services-Non Taxable

Qty On Hand: 0.000

Average Cost: \$0.00

Ask For Price  
 Ask For Name  
 Ask For Quantity  
 Credit Book Eligible  
 Inventoried Item  
 Track Countdown  
 Daily Special  
 Auto Increment Seat  
 Auto Increment Cover  
 Disable ability to discount

Active  
 Dont Display at POS  
 Round Of Golf  
 Ask For Guest  
 Tax Inclusive  
 Allow Fractional Quantity & Price

FrnB Item  
 Retail Item  
 Billing Item

Name On Screen: 10 Pack 1hr Golf Lessons

Graphic File Name:

Override Category Style:

Background Color: 255, 128, 0

Foreground Color: 0, 0, 0

Caption H Align: Default

Caption V Align: Default

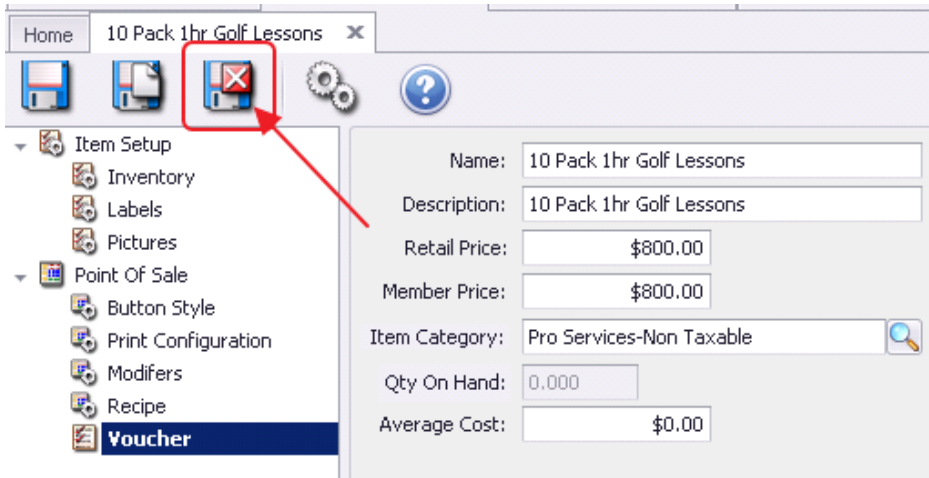
Image H Align: Default

Image V Align: Default

POS Button Preview

10 Pack 1hr Golf Lessons

When complete, click **Save and Close**.



Home 10 Pack 1hr Golf Lessons

Save and Close  
 Save  
 Print  
 Refresh  
 Help

Item Setup

- Inventory
- Labels
- Pictures
- Point Of Sale
  - Button Style
  - Print Configuration
  - Modifiers
  - Recipe
  - Voucher**

Name: 10 Pack 1hr Golf Lessons

Description: 10 Pack 1hr Golf Lessons

Retail Price: \$800.00

Member Price: \$800.00

Item Category: Pro Services-Non Taxable

Qty On Hand: 0.000

Average Cost: \$0.00

# POS - Voucher Sale and Redemption

## Voucher Sale

Within the Point of Sale System, once a new transaction has been started and a Member has been selected, a Voucher (Package) may be selected for purchase. Depending on setup, buttons may appear in various places.

In this example, selecting the **Lesson/Fitting** Group Button provides a list of additional options where the **Voucher (Package) Item** is included.

test2, test      Area: Golf

**Member Info** ID: 558  
Type: Business  
Credit Book: \$0.00

Prefs

History

UPC:  Enter UPC

1 2 3 4 5 6 7 8

Q Name Price

Main		Member	Balls	Cart Fee	Guest Ticket Name	Putter
18 Hole Cart	9 Hole Cart	Cart Fee	Guest Fee	Guest Book		
Woods	Irons	Putters	Wedges	Balls		
Hats	Gloves	Socks	Shoes	Linda GC FB		
Brendan Lesson	10 Pack 1 hour Lesson	Lesson/ Fitting	Respike Golf Shoes	Open Fractional Price		
Mens Clothing	Womens Clothing	Issue Rain Check	Redeemed Rain Check	Gift Card Issued		
Misc Taxable	Misc. Non-Taxable	Open Message	Other Club Fee	Beer		
Tournament Combo	Acorn Cup Invitational	Great Saturday Morning Get Together	Tennis Home			
Pro Services-Non Taxable	10 lesson Pack	Payment Received	Practice Swing	Gift Card		

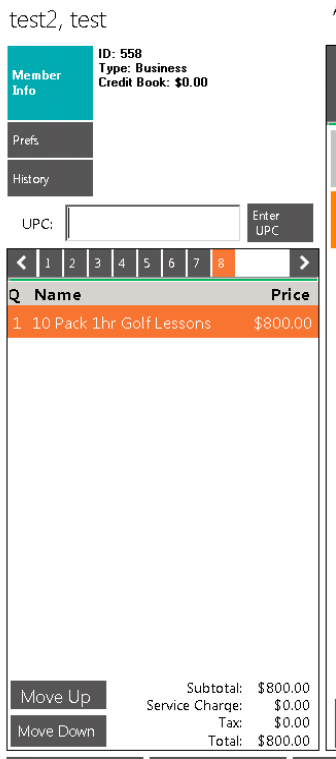
The Voucher Package Item - **10 Pack 1 hr Golf Lessons** has its own button and is the item initially sold for future redemption. In this example, the 10 pack retails for \$800.00.

Area: Golf      Ticket #1.

Main		Member	Balls	Cart Fee	Guest Ticket Name	Putter					
Garrett Hr Lesson	Garrett 1/2 hr lesson	Lessons Package	Jim Lesson	Brendon Package Lessons	10 Pack 1 hour Lesson	10 lesson Pack	Brendan Lesson 15 minutes	Brendan Lesson 1/2 hour	Chris Lesson	10 Pack 1hr Golf Lessons	Tammy Lesson
Tammy Fitting	Brendan Lesson 1 hour	Brendan Fitting	Ray Lesson	Ray Fitting	Practice Swing	testing for new sku					

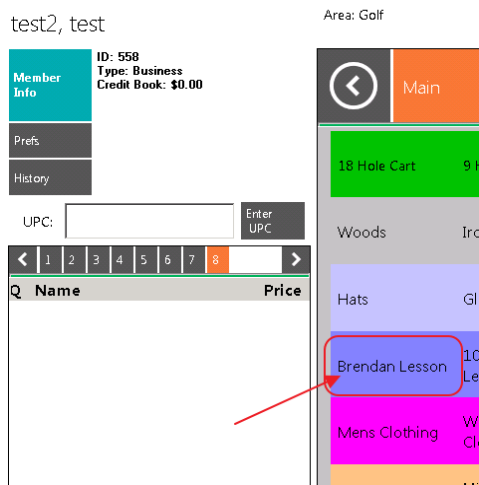


Once selected, the Item is added to the ticket, and the ticket can then be closed based on Member payment preference.



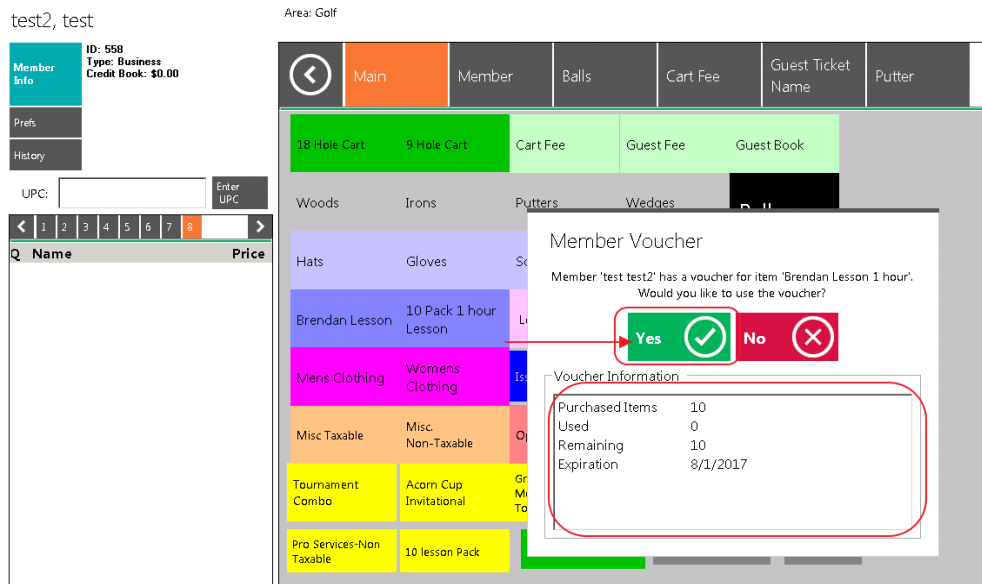
## Voucher Redemption

When the Member redeems their first lesson, a separate button (for the Voucher Item (Redeemed)), is selected.

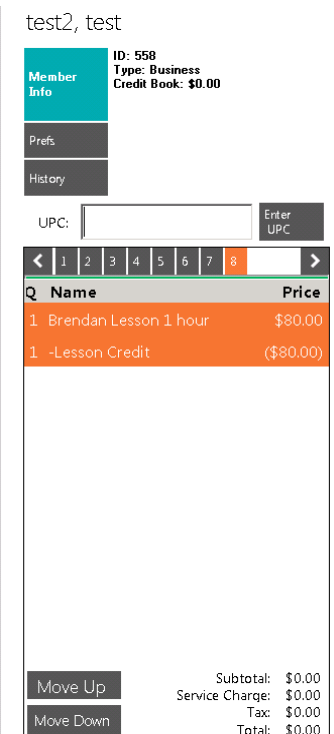


When the Item is selected, the system automatically provides a prompt/alert that the Member has an existing Voucher for the item, and asks for permission to use the Voucher.

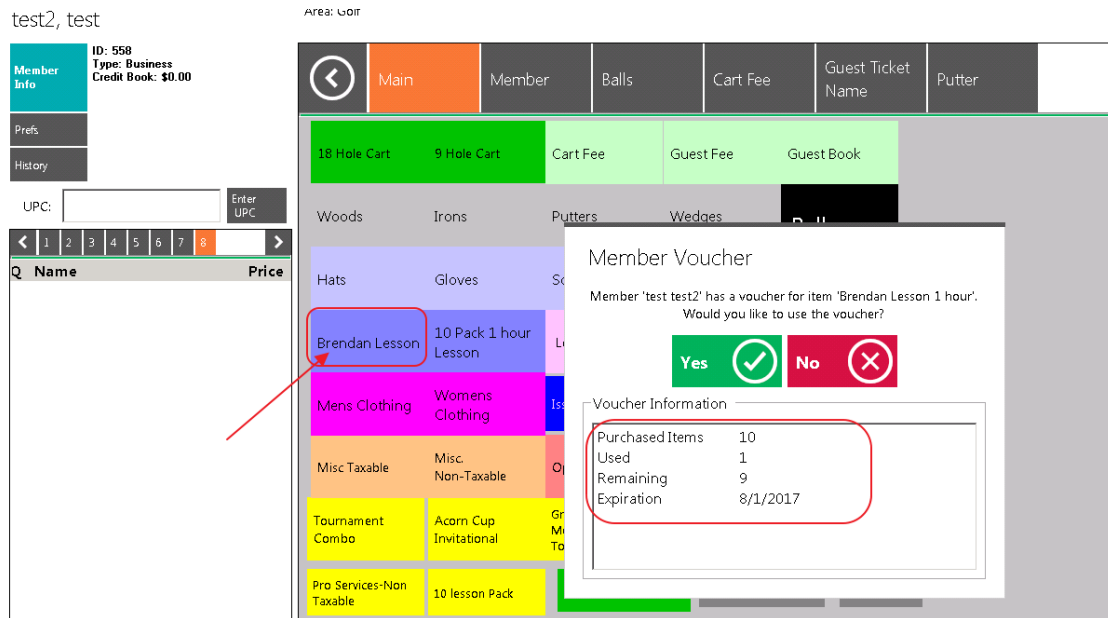
Click **Yes** to use voucher, and add Item to ticket.



Note that the 1 Hour Lesson, as well as an equal credit for the item, is displayed in the ticket, and therefore, the resulting charge is \$0. After closing out the ticket, the system will automatically deduct (1) voucher from the original quantity purchased(10), leaving (9) available for future use.



Upon next visit, the prompt/alert will again appear, and will reflect that (1) voucher has been utilized, leaving (9) available for use.



If Member would like the Item, but would not like to use a Voucher for this lesson and instead would like to purchase the lesson outright, click **No** to add item to ticket, without using a voucher. Close ticket based on Member payment preferences.

## Best Practices

Ensure the Categories for the Voucher Package Item, Voucher Item (Redeemed), and Voucher Credit are set to the same Category.

Generate POS buttons and placement that makes finding Voucher Packages as well as Voucher Items easy to find. Use same color to tie related Items together.

## Common Questions and Concerns

### When is Revenue recognized in the system?

Revenue is recognized either at the time of sale of the original Voucher, or when the Voucher Item is redeemed, depending on Club setup.

## What if I add a new Voucher Item to the Voucher Package after initial setup and sale?

Only Vouchers sold after the change, would reflect the additional item. For example, if a Voucher was originally set up to only include a ½ hour lesson (in exchange for .5 voucher), or an hour lesson (in exchange for 1 Voucher), but later was adjusted to also include a 15 minute lesson (in exchange for .25 Voucher), Members purchasing the voucher prior to the 15 minute lesson being added would be required to pay for a 15 minute lesson, rather than exchanging it for .25 Voucher. Members purchasing the Voucher after the change, would be able to exchange .25 Voucher for a 15 minute lesson.