12.0 Setting up House Accounts and Gift Cards

The ***House Accounts*** function can be used to set up a revolving account for customers or employees where account activity is tracked for a period of time. The account activity can then be reset at the end of a billing cycle when the customers are billed, and the balances can either be carried forward or reset to zero, depending upon whether or not account payments are entered into the system. *<u>In this case, customers are billed after their purchases on whatever billing cycle you decide to use.</u>*

This function can also be used to track ***Gift Certificates*** or ***Gift Cards***. The accounts are marked as “Credit Only” which means that the account cannot be used if the total charges to the account are higher than the payments that have been made. *<u>In this case, customers must prepay money to their account in order to use it for purchases.</u>*

House Accounts can be setup to use either an account “number” or a magnetic stripe card. The account “number” either way must be at least 5 characters long and no more than 50, but it can use any combination of alphabetic and numeric characters. This account “number” is what will print on the payment receipts when a payment is made to the account, so if you are not using magnetic stripe cards, you may want to use an account name with a numeric suffix for each account “number” so that the account name will print on the receipts. If you are using magnetic stripe Gift Cards, then the account name and the account number will both be the alphanumeric designation that is encoded onto the magnetic card.

12.1 Setting up the *Gift Card* or *House Account* payment tender

Go to Register Setup to Register Configuration, and click on the *Credit Card, Paid Outs, Customer Requests, Job Titles, Voids* tab. Press the Tender Types button on the left side of the screen. Type a name for the tender (Gift Card, Gift Certificate, or House Account, for example). Click the box marked “House Account” to put a check mark in it, and then click Save. This will add the new tender type to the list of available payment options that appear on the tender screen when checks are closed

12.2 Setting up Accounts

On the Manager Menu, click the ***Gift Certificates/ House Accounts*** button. Type a name (1a) for the account. Type the address and phone number information, if desired. The address and phone number are optional. Then type an account number (1b) or click in the account number box and swipe a magnetic card. The account number should be from 5 to 50 characters long and can include letters and numbers. Select *House Account* from the drop-down menu (2) on the top right corner of the screen.

Type a Maximum Daily and/ or Weekly amount (7) that can be charged to this account. The Daily and Weekly Limits are optional. Other optional selections are the *special events* (3) feature which allows you to put in important dates for that account (i.e. birthdays and anniversaries), the *special interest* (4) area which will allow you to enter in up to four selections, and the *expiration date* (5), which will allow a time limit to be set by number of days on any house account or gift card. Hit save (6) and your new *House Account* is created, now all you have to do is apply a payment to it and you’re done.

12.3 Gift Cards

On the Manager Menu, click the ***Gift Certificates/ House Accounts*** button. Select *Gift Card* from the drop-down menu (2) at the top of the screen. Type in a name (1a) for the *Gift Card* account and type in an account number (1b) or swipe a gift card and hit save.

12.4 Applying A Payment

To apply a payment to a *House Account* or *Gift Card* you first need to create a menu item for House Account Payment. To create a new menu item you need to go to the managers menu->menu maintenance->menu items and pricing. It doesn't matter what you call the item as long as you set it to the department *Account Payment*. Make it an open priced item and take the check mark out of the box next to *Taxable*. Touch the save button. Micro$ale will ask you if you want assign this new menu item to a button, touch the yes button.

After you have created the apply payment button you can now apply credit to your house account or gift card. Simply go to the server screen, either open up a table or select the express order button. Touch the category button that the *Apply Payment* button is assigned to. Touch the *Apply Payment* button. A window will pop up asking you to enter the amount of the payment; type in the amount of the payment and then hit done. Touch the tender button and when it takes you to the tender screen select payment method. After it is tendered a window will pop up asking you to enter in the account number. Type the number or swipe your card, hit process and the payment will be applied.