

Issuing Event Refunds to Gift Cards

Instead of immediately issuing refunds, consider asking your registrants to convert their registration fees into donations or into an electronic gift cards that can be used for anything sold through Doubleknot. Your customers can use these gift cards to pay for online purchases and for in-person purchases in Sales Station.

Can My Organization Use this Feature?

This feature is only available for organizations that use Doubleknot gift cards.

- If your organization already issues gift cards through providers like Tendercard and Worldpay (formerly Vantiv), you cannot use Doubleknot gift card features.
- To determine whether your organization can currently issue Doubleknot gift cards, go to the Feature List and click **Financial Accounts**. If the second tab contains the word “Gift Cards,” you can use the steps in this document. (Depending on your organization, the tab may also contain Loyalty Accounts and Grants.)

If the Gift Cards tab is not displayed, contact us at support@doubleknot.com with the subject “Request to turn on electronic gift card processing” to enable the feature.

Required Permissions

To use all the features in this document, you must have Admin permissions in Event Management and Financial Accounts. Contact your organization’s Doubleknot administrator to request access to these features feature.

Overview

The general steps to convert a registration fee to a gift card are:

- Issue a refund to a gift card.
- Delete the registration.

Information about how your customers can use their electronic gift cards to pay for items in Doubleknot is located at the end of this document.

Refund Event Fees to a Gift Card

To refund registration fees for a canceled event to a gift card, follow these steps:

1. Display the management page for the event.
2. Click Manage Registrations.
3. Locate a registration to work with.
4. In the three-dot menu at the right, click **View Payments**. The PAYMENT DETAILS page will be displayed.

On the Payment Details page, click the underlined dollar amount of the payment.

PAYMENT DETAILS FOR REGISTRATION # 2869843						
ID	Transaction Date	Posting Date	Type	Details		Amount
2864033	3/18/2020 3:30:37 PM	3/18/2020	Online Purchase	New registration		\$60.00
2864035	3/18/2020 3:30:37 PM	3/18/2020	Credit Card	Payment made through store order 27812		<u>(\$60.00)</u>
Balance:						\$0.00

[← Go Back](#) [Issue Receipt](#) [Adjust Balance](#)

5. Locate and click the underlined dollar amount that the customer paid. In the image above, the amount is highlighted to demonstrate its location. The TRANSACTION DETAILS page will be displayed.
6. On the bottom of the TRANSACTION DETAILS page, click **Issue Refund**. The ISSUE A REFUND page will be displayed.
7. Enter the following information:
 - In the AMOUNT TO CREDIT field, enter the amount of the refund.
 - In the REASON FOR CREDIT field, enter a short explanation of the refund.
 - In the CREDIT AMOUNT field, enter the amount of the refund.

- Click **Refund to Gift Card**. The CREDIT CONFIRMATION page will be displayed and an email will automatically be sent to the purchaser that contains information about the refund.
- Click **Done**. The PAYMENT DETAILS page will be displayed and show that a gift card was issued to the customer. The balance is not \$0 because the registration hasn't been cancelled yet.
- Click **Go Back**. The MANAGE REGISTRATIONS page will be displayed.

Preparing to issue a refund to a gift card

ISSUE A REFUND

Before issuing an event cancellation refund due to COVID-19, please read this important message.

[Refund Options and Recommendations](#)

Organization Account: Lake Nature Center General
 Payment Description: Order Number 27812
 Payment Date: Mar 18 2020 3:30PM
 Cost to Process Refund: \$0.00
 Original Payment Amount: \$60.00
 Less Previous Issued Refunds: \$0.00
 Available to Refund: \$60.00
 Payer to Refund: Carolyn Alvarez
 Payer's Account: Credit a different credit card
 MasterCard 5555XXXXXXXX4444 Exp. Date: 12/2021

Amount to Credit: \$ 60

Reason for Credit: Spring Workshop cancellation - gift card issued

Account	Item #	Description	Original Amount	Remaining	Credit Amount
General	2869843	Spring Workshop (04/07/2020)	\$60.00	\$60.00	\$ 60.00

Transactions to Credit:

Cancel
Refund
Refund To Gift Card

Delete the Registration

To delete the registration, follow these steps on the MANAGE REGISTRATIONS page:

- In the three-dot menu at the right of the registration, select **Delete Registration**. The DELETE WARNING page will be displayed.
- Click **Delete**. A confirmation dialog is displayed.

Click Delete to delete the registration after issuing the gift card.

DELETE WARNING

Deleting the registration will not undo any payments made. Are you sure you want to delete the registration?

No
Delete
Adjust Balance and Delete

- Click **OK**. The MANAGE REGISTRATION page is displayed and the registration has been cancelled. If you select **View Payments**, the PAYMENT DETAILS page will show that the registration was deleted and the balance is \$0.

After issuing a refund to a gift card and deleting the registration, the balance for the registration will be \$0.

PAYMENT DETAILS FOR REGISTRATION # 2869843						
ID	Transaction Date	Posting Date	Type	Details		Amount
2864033	3/18/2020 3:30:37 PM	3/18/2020	Online Purchase	New registration		\$60.00
2864035	3/18/2020 3:30:37 PM	3/18/2020	Credit Card	Payment made through store order 27812		(\$60.00)
2864038	3/18/2020 3:34:41 PM	3/18/2020	Credit	Credit (Spring Workshop cancellation - gift card issued) issued through store order 27812		\$60.00
2864039	3/18/2020 3:38:00 PM	3/18/2020	Online Purchase	Deleted registration		(\$60.00)
						Balance: \$0.00

← Go Back
Adjust Balance

How Customers Receive the Gift Card

When you issued the gift card, Doubleknot sent the purchaser an email to inform them that their fees were applied to a gift card. The text you entered on the Refund page is displayed. The gift card number is highlighted in the purchaser email below:

City Museum
 123 Santa Clara Street
 San Jose CA 98194
 US

Billing Details:
 One Run
 1 Main St
 R RI 95070
 US
1@run.net
 1818181
 Electronic gift card 27804-4932377 issued - Gift Card balance is \$10.00

Refund

Order Number: 27804
Order Date: 3/18/2020

Description	Qty	Amount
Crab Fest	1	\$10.00
		Tax Refunded
		Total Refunded \$10.00

How Customers Pay with the Gift Card

Online Payments

When electronic gift cards are enabled for your organization, the payments page will display gift card payment as an option. To pay, customers will:

1. Select **Gift Card** as the payment type.
2. Enter their gift card number in the GIFT CARD NUMBER field.

3. Click **Make Payment**.

- If the balance due is greater than the amount of the gift card, customers will be asked to provide an additional form of payment.
- If the balance due is less than the amount of the gift card, the unused funds remain on the card and can be used in the future.

To pay with a gift card, customers will select Gift Card as the payment type (highlighted below) and enter the Gift Card Number in the field (highlighted below).

The screenshot shows a payment interface titled "PAYMENT & BILLING INFORMATION". Below the title, it says "Please choose your payment type:". There is a row of payment method icons: PayPal, VISA, MasterCard, American Express, DISCOVER, ECHECK, Gift Card (highlighted with a yellow box and a hand cursor), Legality, and another icon. Below this row, there is a red asterisk followed by the text "* Indicates required fields". Underneath, the "Gift Card" section is visible, with a label "*Gift Card Number:" and a text input field containing the number "2869586".

Payments at Sales Station

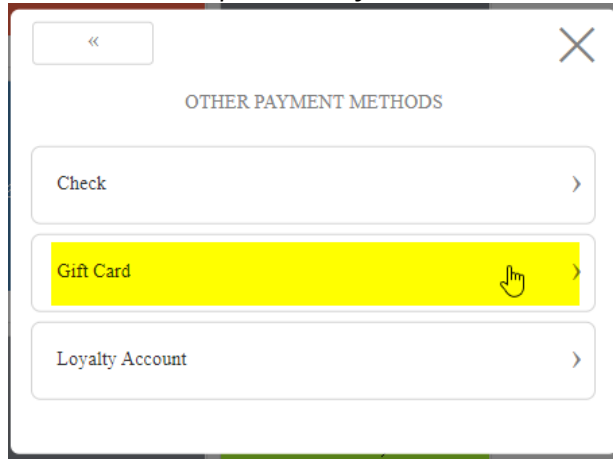
When gift cards are enabled for your organization, they'll be displayed as a payment type on the payment page. To apply a gift card to a Sales Station purchase, follow these steps on the Sales Station payment screen.

1. Tap or click **Other Payment Methods**.
2. Tap or click **Gift Card**.
3. Enter the gift card number in the displayed field.
4. Click **Charge**. The gift card will be applied to the balance due.

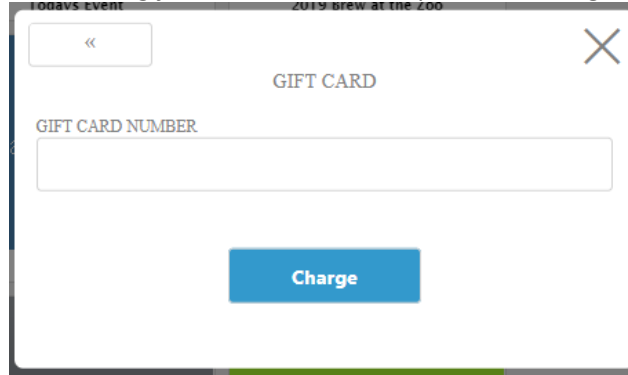
Click or tap **Other Payment Methods**

The screenshot shows a payment screen with a close button (X) in the top right corner. Under the heading "CASH", there are five buttons: "\$12.77", "\$13.00", "\$15.00", "\$20.00", and "Custom". Below this, there are sections for "CREDIT CARD" and "CVV2" with input fields. There are also sections for "EXPIRATION DATE" (with "MMYY" placeholder) and "POSTAL CODE" with input fields. A blue "Charge" button is centered below these fields. At the bottom of the screen, there is a yellow button labeled "Other Payment Methods" with a hand cursor icon and a right-pointing arrow. Below that is a grey button labeled "Purchaser Name & Address" with a right-pointing arrow. At the very bottom, it says "AMOUNT DUE" followed by "\$12.77" in a large blue font.

Tap or click **Gift Card**



Enter the gift card number and tap or click **Charge**.



Viewing Gift Card Transactions and Reports

Viewing a List of Gift Card Transactions.

1. In the FEATURE LIST, click **Financial Accounts**.
2. Click the GIFT CARDS, LOYALTY ACCOUNTS AND GRANTS tab.
3. Click **View Accounts and Transactions**. The VIEW ACCOUNTS & TRANSACTIONS page is displayed.

NOTE: If this item isn't visible, your logon account doesn't have the right permissions to view this information.

4. If the account type at the upper left is not GIFT CARD, select **Gift Card** from the ACCOUNT TYPE menu.

Viewing Gift Card Transactions

VIEW ACCOUNTS & TRANSACTIONS				
Account Number	Description	Create Date	Balance	
27815-4[REDACTED]	[REDACTED] gift card issued as refund from order 27815	3/18/2020	\$10.00	...
27814-4[REDACTED]	[REDACTED] gift card issued as refund from order 27814	3/18/2020	\$10.00	...
27804-4[REDACTED]	[REDACTED] gift card issued as refund from order 27804	3/18/2020	\$10.00	...
27801-4[REDACTED]	[REDACTED] gift card issued as refund from order 27801	3/18/2020	\$10.00	...

Viewing Gift Card Information in Financial Reports

To view summary information of all gift card transactions during a specified date range, follow these steps in Financial Accounts.

1. Click **Financial Reports**. The FINANCIAL REPORTS page is displayed.
2. In the GENERAL panel, click **Gift Cards Loyalty Accounts and Grants Liability**. The report will be displayed.
3. In the date fields, enter the range of dates for the transactions you want to view.
4. Click **Update Results**. The transactions will be displayed. At the bottom of the Gift Cards section, the total amount of liability associated with the transactions is displayed.

REPORT

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FILTERS
FIELDS

Gift Cards Loyalty Accounts and Grants Liability

CreateDate

+

3/17/2020

📅

3/20/2020

📅

🔄 UPDATE RESULTS

▼ Gift Card

Account Number	Account Description	Create Date	Balance
25933-	gift card issued as refund from order 25933	3/18/2020 12:28:02 AM	\$65.00
26515-	gift card issued as refund from order 26515	3/18/2020 12:05:03 AM	\$95.00
26515-	gift card issued as refund from order 26515	3/18/2020 12:20:19 AM	\$95.00
26574-	gift card issued as refund from order 26574	3/17/2020 11:59:36 PM	\$1,260.00
26576-	gift card issued as refund from order 26576	3/17/2020 11:50:12 PM	\$144.00
26767-	gift card issued as refund from order 26767	3/18/2020 10:00:12 AM	\$65.00
27440-	gift card issued as refund from order 27440	3/18/2020 11:21:29 AM	\$36.00
27635-	gift card issued as refund from order 27635	3/18/2020 8:28:35 AM	\$45.00
27656-	gift card issued as refund from order 27656	3/17/2020 11:24:06 PM	\$5.00