



## Gift Cards

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Cartzy offers the following three powerful features to drive sales on your store:

- Discounts
- Gift cards
- Upselling products

Discounts reduce the price of specific items or orders during the current transaction, while **gift cards** are monetary vouchers for future purchases. Upsell promotes higher-priced alternatives, increasing order value and maximizing revenue in e-commerce.

This article mainly explains the process of configuring gift cards in your **Cartzy** store. Gift cards can be effective in generating immediate revenue, fostering customer loyalty, providing valuable data insights, reducing returns, and boosting brand exposure. They also serve as a seasonal sales booster and a marketing tool to attract and retain customers.

### Path: Discounts > Gift Cards

On the main **Gift Cards** page, all the generated gift cards are listed with the following information:

- Gift card voucher code
- Status (enabled/disabled)
- Note (added by the admin)
- Customer name to whom the gift card was issued

- Date created
- Amount (total value of the gift card)



## Creating a gift card

Follow these simple steps to create a new gift card:

1. Click on the Issue **Gift Card button** at the top right corner of the **Gift Cards** page. You will be navigated to the **Issue Gift Card** page.



2. On the Issue **Gift Card** page, there are four sections that you need to configure to issue a new gift card. Therefore, have this information on hand before you sit to generate gift cards for your valued customers.

- a. Gift Card code and value
- b. Customer information
- c. Notes
- d. Expiration date



3. Please refer to the image shared below to understand the following two fields.

**Gift card code:** Here you can enter the voucher code according to your business standards and formats. It could be a mix of characters and numbers. For example, GFT-2024-001.

This is the code that will be sent to the customer so that they can use it on your site for their future purchase.

**Initial value:** Specify the amount you wish to grant the customer as a free purchase value on the gift card. Please note that the currency that will be used here is the one that is set up for your store at the path: **Settings > General settings**.



### 4. Find and add a customer

Using the search bar, find and select the customer to whom you want to issue the gift card.

**Notes:**

- - The customer should be registered on your store. If the customer is not registered, you need to first add the customer to your customers' records.
  - You can add only one customer against one gift card.



5.  Here you can add notes for management or administration purposes. For example, you can add a note for future reference that you are creating a gift card for the first time for a specific customer. These notes are visible only to the admin.



## 6. Expiration date

**a. No Expiration Date:** Select this option if you don't want to set any expiration of the voucher. The customers will be able to use it whenever they want regardless of the period from the issue date.

**b. Set Expiration Date:** Select this option if your gift card is valid for a specific time, for example, **Christmas** holidays. You can then, define the expiration date and time to define the validity of the gift voucher.



7. Once, everything looks good on the Issue **Gift Card** page, click the **Save** button at the top right corner of the page.



8. As soon as you hit the **Save** button, the following occurs:

- a. The new gift card is generated and saved successfully in the system.
- b. A notification of success appears at the top right corner of the page.

- c. The page refreshes to display the new gift card listed on the main **Gift Cards** page.
- d. An email is sent to the customer notifying them that a gift card has been generated for them.



The image shared below demonstrates the email sent to the customer against the gift card details added in the previous steps (images above).

□ The gift card email content can be customized at the path: **Settings > Notifications > Gift Card Created.**



## Editing a gift card

Once, you have created a gift card, you can always edit it. To do so, follow these steps:

1. Click on the **kebab menu icon** against the gift card on the main **Gift Cards** page, and select the **Edit Gift Card** option from the dropdown.



2. The gift card will be opened in the edit mode. On the **Edit Gift Card** page, you can make your desired changes. For example, in the image shared below, the **Notes** are updated. Click the **Save button** to save the edits.



3. As soon as you click the **Save** button, the following occurs:
  - a. The gift card is saved with the changes.
  - b. A notification of success appears at the top right corner of the page.
  - c. The page refreshes to display the updated gift card information on the main **Gift Cards** page.
  - d. An email is sent to the customer notifying them that a gift card has been

issued to them.



## Disabling / enabling a gift card

Rather than deleting a gift card, you can simply disable it. Similarly, you can enable an inactive gift card.

No email is sent to the customer upon enabling/disabling a gift card.

### Disabling a gift card

To disable a gift card, do the following:

1. Click on the **kebab menu** icon against the gift card name, and select the **Disable Gift Card** option from the dropdown.
2. You will be prompted to confirm this action. Click on the **Disable** button to proceed. Please note that a disabled gift card will be of no use to the end customers.



Once you hit the **Disable** button on the confirmation popup, the following will occur:

- The gift card will be disabled successfully.
- A success notification will appear at the top right corner of the page.
- The **Gift Cards** page will refresh to display the updated status of the gift card.



### Enabling a gift card

To enable a gift card, follow the same steps as explained for disabling a gift card. Except now you will select the **Enable Gift Card** option from the dropdown.



Once you hit the **Enable** button on the confirmation popup, the following will occur:

- The gift card will be enabled successfully.

- A success notification will appear at the top right corner of the page.
- The **Gift Cards** page will refresh to display the updated status of the gift card.



## Deleting a gift card

To delete a gift card, simply click on the **kebab menu** icon against the gift card name, and select the **Delete Gift Card** option from the dropdown.

You will be prompted to confirm the deletion action. Click on the **Delete** button to delete the gift card permanently. Please note that this action of deleting the card is irreversible.



Once you hit the **Delete** button on the confirmation popup, the gift card will be deleted from the system successfully. A success notification will appear at the top right corner of the page. The **Gift Cards** page will refresh to display the updated list of gift cards.

