Gift Card - User guide

by CedCommerce Products Documentation

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1. Overview

Gift Card Extension for Magento 2 by CedCommerce facilitates customers to purchase Gift Cards and send them to their friends over their email address.

Gift cards are discount coupons that the user can use for making a purchase on our website. Admin can create multiple gift cards with different pricing models, enabling the customer to do the shopping via gift card coupons. The key features of the Gift Card module are as follows:

- 1. The Customer who wants to sent a Gift Card to Other choose the image for the Gift Card from the available options. He can also upload an image of his own choice.
- 2. Then he is allowed to choose the amount of the Card from the Pre-Defined amounts set else he can also add any random amount as per his requirement.
- 3. Customer sending the Gift Card can also mention a Message that he/she wants the receiver to see in their Fmail
- 4. Customer sending the Gift Card even has a privilege to Schedule the Delivery of Gift card as on any specific date even after he has already completed his purchase, so the Customer receiving the gift card will automatically receive a gift card mail on the specified date.

Note:

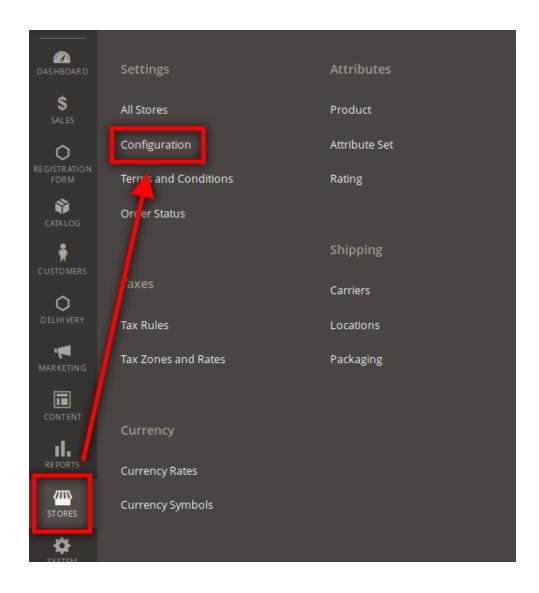
- 1. At a time of Purchasing a Gift Card; Coupon-Code of any earlier gifted card will not be applicable as well as any discount code.
- 2. The gift card once bought cannot be refunded it means that the Credit Memo cannot be generated.
- 3. To enable the Gift Card Checkout feature for any product admin need to Enable the attribute "Gift Card Checkout Allowed" from the admin panel at the time of creating the product.
 Now at the store frontend, if the customer wants to use the Gift card coupon code to purchase a product,

he needs to enter the coupon code at "Apply Gift Coupon".

- 4. Admin cannot create the Gift card order on behalf of any customer from *Create Order* at Magneto Admin Panel.
- 5. Multicurrency is not supported for gift card purchase.
- 6. The discount coupon and gift card are not applied for gift card purchase.
- 7. Reorder of a gift card with the current date and with that of the gift card with a future date would not be added to cart, on this case it would be taken to new gift card product page purchase.
- 8. Credit memo on product purchase with gift coupon would not refund the gift card amount applied.

2. Configuration Setting

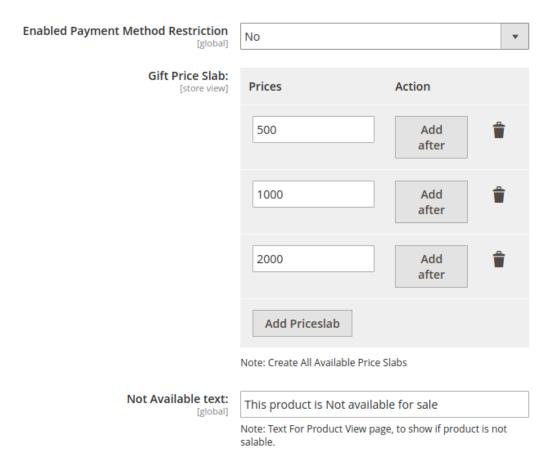
In order to use the gift card for your store, you need to configure the gift card settings. Navigate to configuration section on the Admin Setting.



Magento Admin Panel > Stores > Configuration

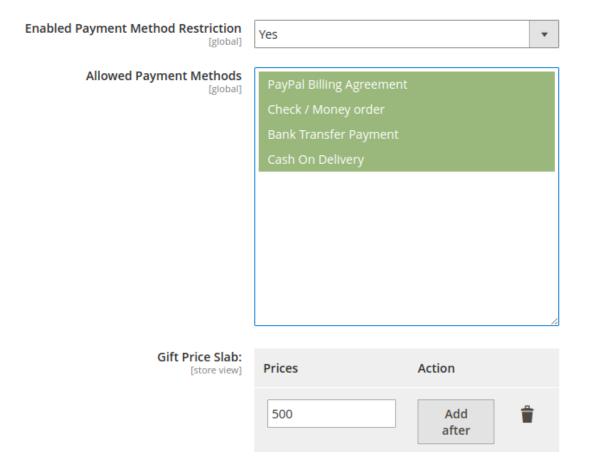
Now, we will see the **gift card** option. There are following options which need to be selected by the admin:

• Enabled Payment Method Restriction: There are 2 options available .



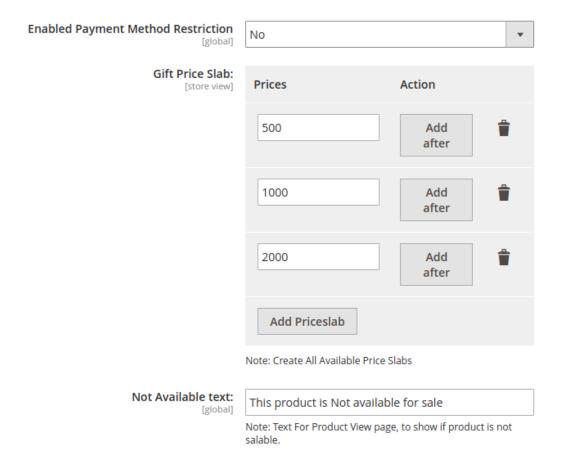
If the option is selected as \mathbf{No} , then for the order to purchase all the payments method that is selected as "yes" would be available for gift card purchase.

2. Yes



If selected as "Yes" then on that condition, for gift card purchase the payment methods selected from here would be only available for the purchase of gift cards and others. Thus, all the sales from admin if not here but still enabled would not be shown in the frontend.

• **Gift card slab:** This section enables the admin to enter the different price values, that he wants to show for the gift card products.

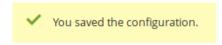


- Thus, the admin can set the slab values. If the admin wants to add the values after one slab, probably he would be clicking on the **Add Pricelab** button, if the admin wants to add slab between two slab values you can probably click on **Add after** button.
- Not Available text: The admin can write down whatever text to show if the stock is not available for the gift card type product.

Once, the admin does so click on **Save configuration** button to save the changes.

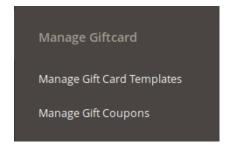


Thus, the admin would be getting a success message as "You saved the configuration".



3. Manage gift card

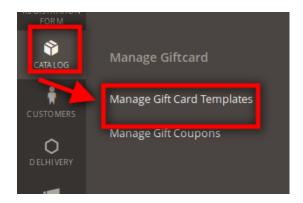
The Manage Gift card is used to provide 2 options as follows:



- 1. **Manage Gift Card Templates:** This section is used to create the templates rule and coupon code format for gift cards.
- 2. **Manage Gift Coupons:** This section shows admin the list of gift card coupons that are created for the customers.

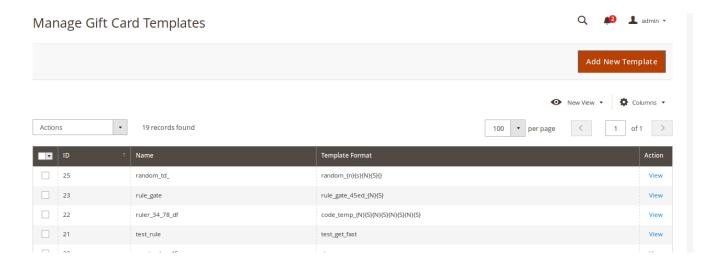
3.1. Manage Gift card templates

This page allows the admin to create the template rule and the coupons code format for gift card type product. In order to navigate to Gift card template the steps are as follows: **Admin panel > Catalog >Manage Gift Card Templates**



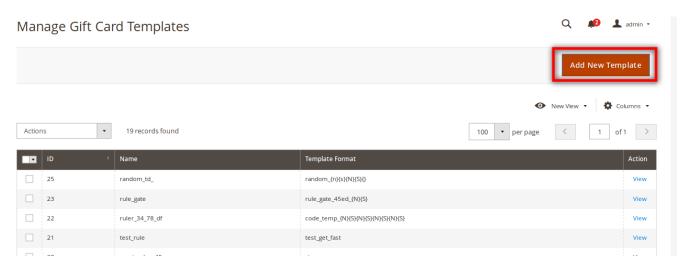
On clicking **Manage Gift Card Templates**, we would be redirected to the Manage Gift card template. The following things can be performed over here:

- 1. Creation of new gift card template
- 2. Edit the gift card template
- 3. Delete the gift card template

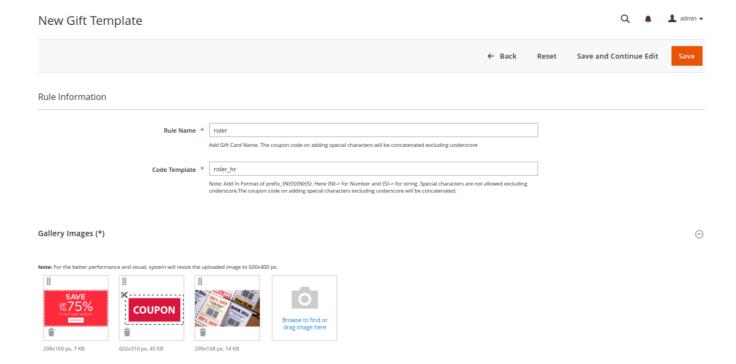


1. Creation of new gift card template

In order to create the gift card template, click on "Add New Template" button.



Once we click on the "Add New Template" we would be redirected to the New Gift Template page. This page consists of many fields and is as follows:



Rule name: The admin can set the name of the template in this field.

Note: The special characters apart from "_" will be automatically truncated on being saved

Code template: The admin can set the format of the coupon code that he wants for the particular gift card product.

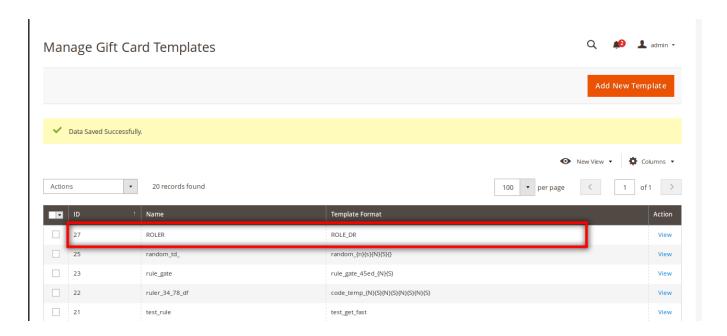
Note: The special characters apart from "_" will be automatically truncated on being saved.

Gallery Image: The admin needs to upload the image for the gift card template. This allows the customer to choose the particular image which he wants to send as a gift card image.

The admin can also give the name of the gift card template design. In order to do so, click on the image and type the name of the gift card in the alt-tab text field, followed by a close button.

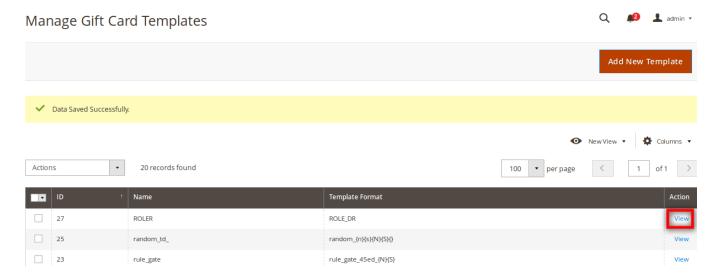
Note: We can upload multiple images for the gift card template.

Once the admin chooses the options from the required fields, he clicks on the **Save** button in order to save the changes. On clicking, we will be redirected to the Manage Gift Card template page and there we would be getting a success message" **Data Saved Successfully**" along with the gift card template name.



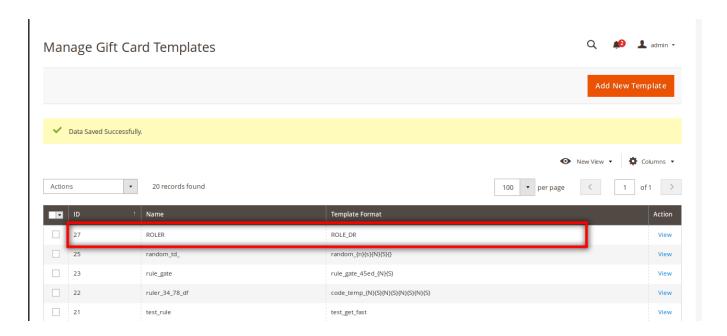
Edit the gift card template

In order to edit the gift card template, click on the **view** button. On clicking, we would be redirected to the edit page of the gift card.

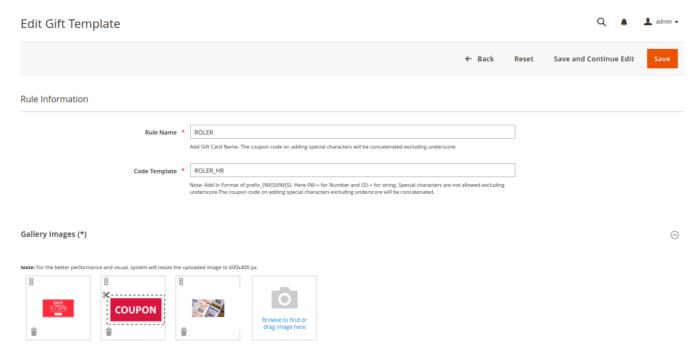


The admin can make the necessary changes in the fields required and click the "Save" button.

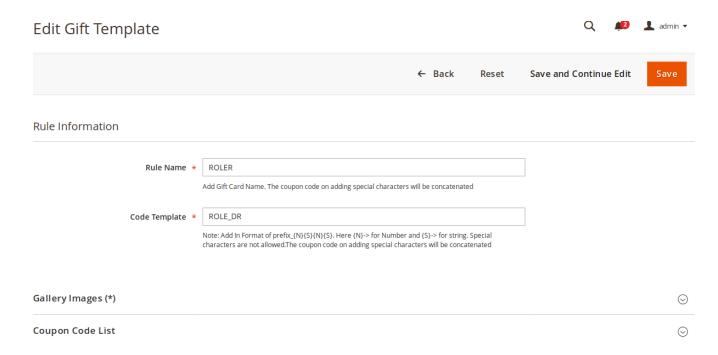
On clicking the "Save" button, we would be redirected to the Manage Gift Card template page. Over that page we would be getting a success message" Data Saved Successfully" and we can also see the changes in the grid view for the particular gift card template.



In case admin wants to go back to the Manage Gift card page, click the **back** button.

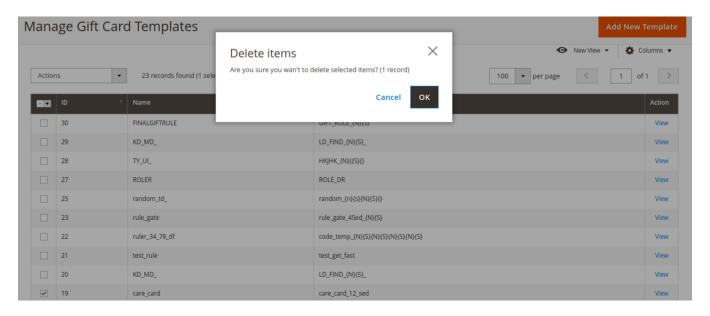


If the admin is not satisfied with the kind of changes that he had done, he can click on the "**Reset**" button. In doing so, it would show us the previously selected values in the field.

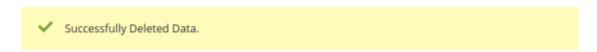


Delete the gift card template

In order to delete the gift card template, click on the checkbox of that particular gift card template that admin does not require. Once, the admin checks those particular rows that he wants to remove. The admin chooses the delete option from the drop-down available above the grid.



On select the delete button, an alert box turns up on the screen, asking the admin " Are you sure you want to delete selected items?".



Once admin chooses the option as "Delete", that particular template gets deleted along with that admin can see

a success message "Successfully Deleted Data"

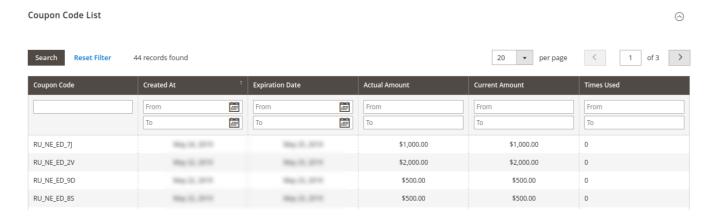
Viewing the coupon codes on the templates

The admin can view the coupon codes that are generated for that template.

In order to view so, click on the edit button of the template whose coupon code is generated.

Note: The admin can only view the coupon codes after the gift card type product invoice is generated and gift card type product contains the template that we are viewing.

Once the template is open, click down to the Coupon Code List.

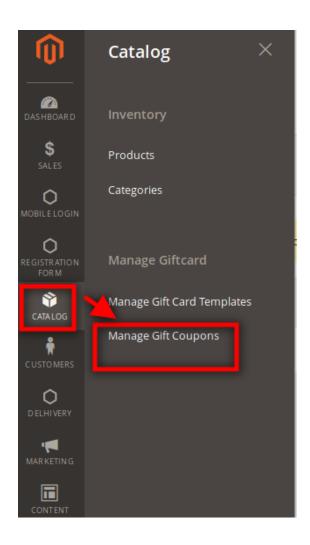


Here, in the grid we can able to clearly see the following things:

- **1. Coupon Code:** The admin can view what is the coupon code that is generated.
- 2. Created At: The admin can view when the coupon code is created
- 3. Expiration Date: The admin can view when the coupon code will get expire.
- 4. Actual Amount: The admin can view for the particular coupon code what the original amount the coupon had.
- 5. Current Amount: The admin can view what is the current status of the coupon code.
- 6. Times used: The admin can view how many times the coupon code has been used.

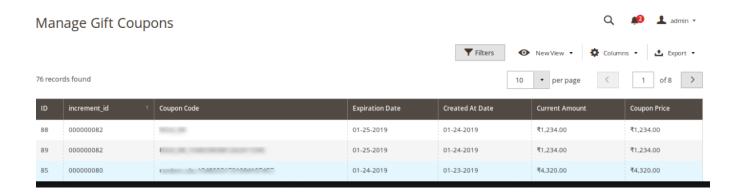
3.2. Manage Gift coupons

This will show us the list of gift card coupons that are already assigned to the customer. In order to go to the Manage Gift coupon page, from the admin panel click on **Catalog>Manage Gift Coupon**.



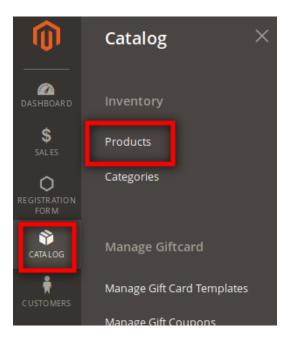
On clicking, we will be redirected to the **Manage Gift Coupons** page. The gift coupon by default show us the following details:

- 1. Gift coupon id: It consists of the order for which the coupon is generated
- 2. Coupon code: It consists of the coupon code that is generated for the particular order.
- 3. Expiration date: The date when the coupon code will get expired.
- **4. Created at the date:** The date when the coupon code is created.
- 5. Current amount: This section shows us the amount that is still available in the coupon code.
- **6. Coupon price:** This section shows us what was the price of the coupon while sending to the receiver customer.



4. Gift card Product

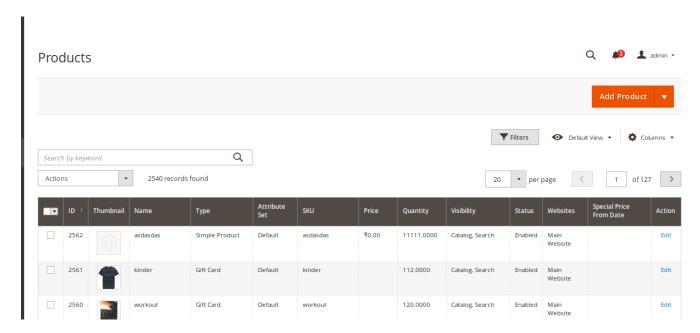
This section is used to create the gift card type product. In order to create the gift type product from the admin panel, we click on :



Catalog > Products

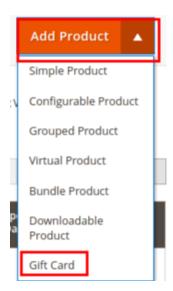
Once we do so we would be taken to the product page where we see the list of already created products. The admin can perform 3 things in this section:

- 1. Creation of gift card product
- 2. Editing the gift card product
- 3 Deleting the gift card products



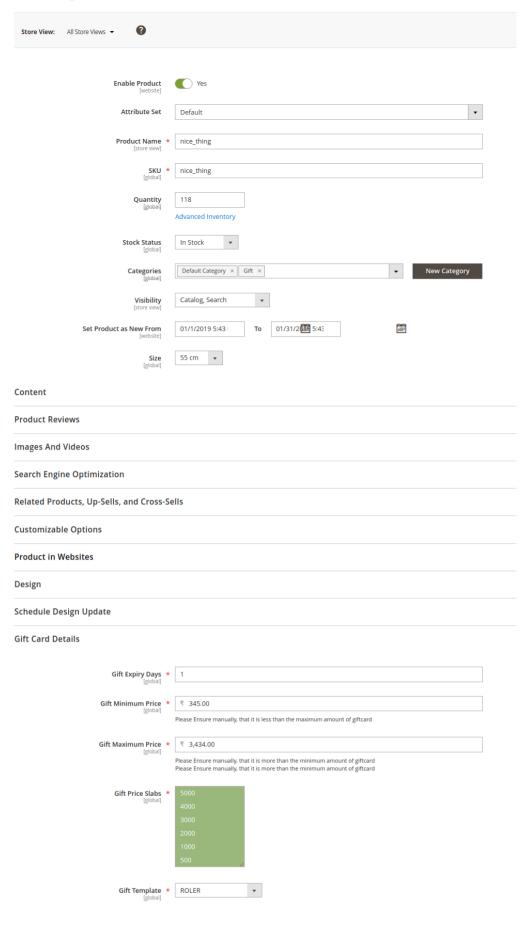
1. Creation of gift card product

In order to create a Gift card, we need to click on the Add button>Gift card



Once, we click we will be taken to the new product page.

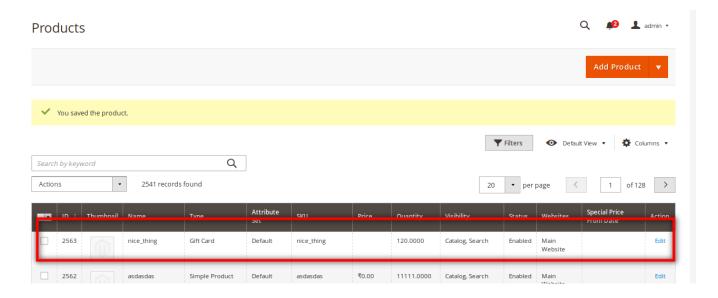
nice_thing



Fill the details in the same way as we create for a simple product type, here we have an extra section that needs also to be filled in order to create gift card type product.

- 1. **Gift Expiry Date:** Enter after how many days the gift card coupon should expire.
- 2. Gift Minimum Price: Enter the minimum amount that should be entered for the gift card product.
- 3. Gift Maximum Price: Enter the maximum amount that should be entered for the gift card product.
- 4. Gift Price Slab: Select price slabs, that admin wants the customer to choose from.
 Note: For the gift card price slab values if values are not between the minimum and maximum amount, then those prices would not be reflected in the gift card product page.
- 5. **Gift template:** Select the template which admin want's to apply for the gift card product Once, admin does so and fill the other fields values, admin clicks on the "**Save**" button.

Once admin clicks the **save** button, he would be redirected to the product page along with that he would also get the success message "You saved the product". In the grid, admin can see the gift card product that he had created in the list.



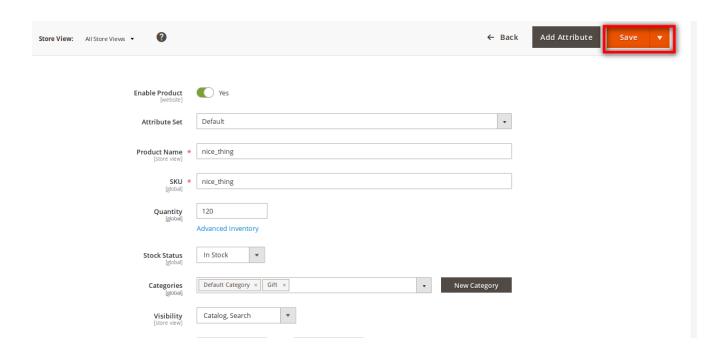
2. Editing the gift card product

In order to edit the gift card product, go to the particular product and click on the edit button.

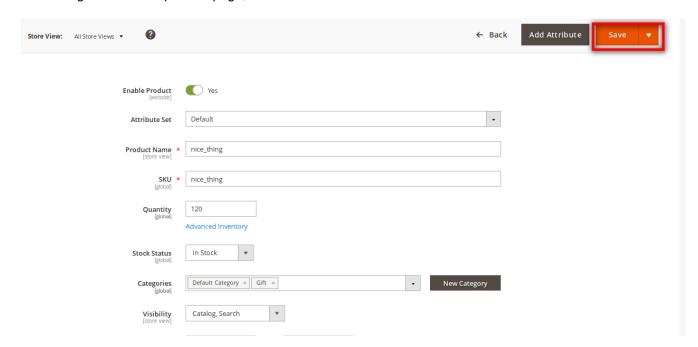


Once, admin click on the edit button he would be redirected to the edit page. Over there he can change the values based his requirement and click the **save** button.

Once, the admin clicks the save button he would be shown the success message "You saved the product".

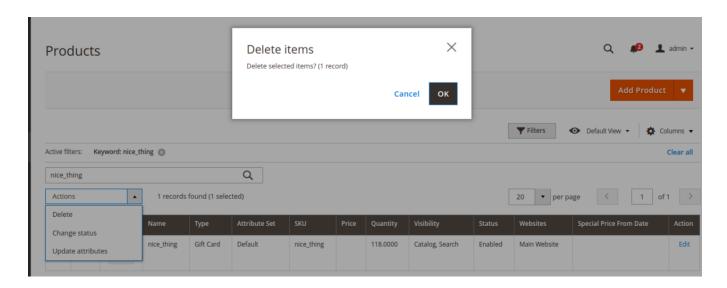


In order to go back to the product page, we click on the **back** button.

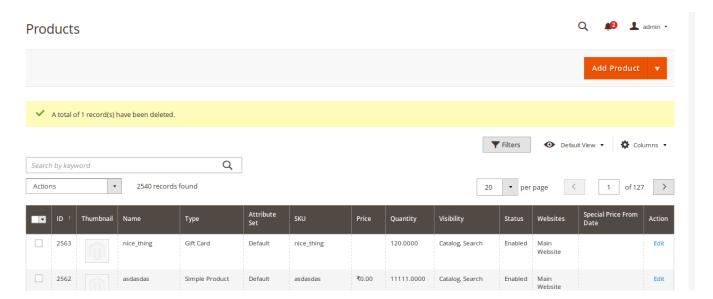


3. Deleting the gift card product

The admin needs to select the gift card product that he needs to remove as products. In order to do so, click on the checkbox for that particular product that admin does not require from his own end. Once admin selects the products, he needs to click on the delete option from the available drop-down list present above the product grid. Once, admin selects the delete button, we would be getting an alert check box. Click on the "Ok" button in order to delete that particular product.



Once the admin, click on "ok" he would be getting a success message "A total of 1 record have been deleted"

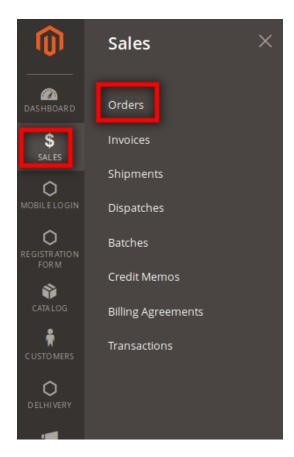


5. Gift Card Order Place

This section comes into the picture when the gift card payment is done through the offline mode. Therefore, for such cases, the admin has to generate the invoice.

In order to do so:

From the admin panel: Click on



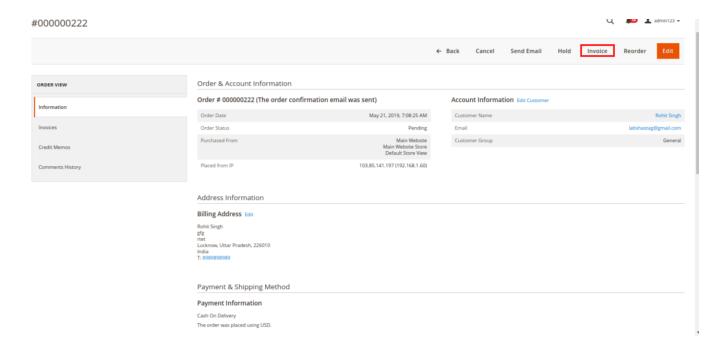
Sales > Orders

Once we click on the "Orders" button admin would be redirected to the orders page.

Here, the admin sees the grid of order that is available.

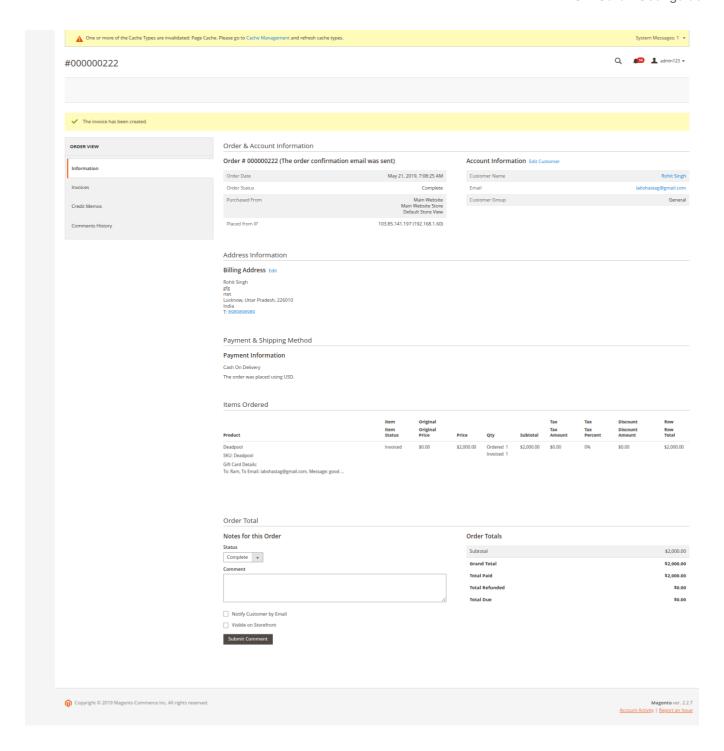
For the order whose invoice needs to be generated, admin goes to that particular order and click on "View" button

Once admin click the "View" button, an admin would be redirected to that particular order.



In order to generate the invoice for that particular order, we click the "Invoice" button.

Here, we update the number of items for which we need to generate the invoice. Once admin does so, he clicks on the "Submit button".



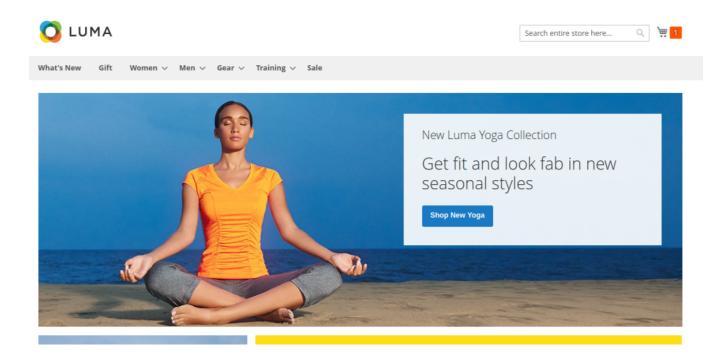
Now, we will be getting a success message "The invoice has been generated". And we could clearly see the status has been changed to "**Completed**".

Note: The credit memo will not be shown for the gift card product purchase.

6. Gift card Purchase: Customer's End by Sender

In this section, we will see how the customer will purchase the gift card product and send it to the other customer. In order to purchase the gift card coupon, go to the customer panel and search the gift card product either from the category or search the item in the search box for the gift card.

Note: We can search the product either through the product name or through the SKU.



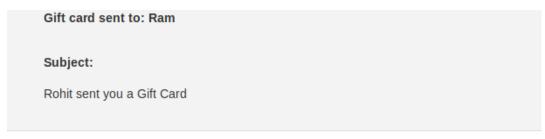
Select any gift card product and click on it.

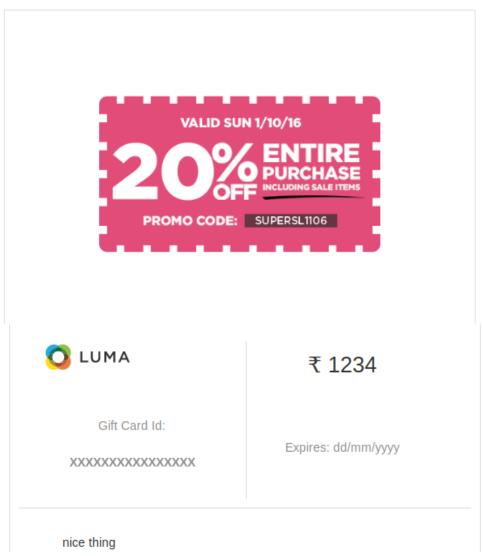
Once, customer click on it he would be taken to that particular product, where the customer needs to fill the available fields which are as follows:

- 1 **Choose the card:** From the list of gift card template images available, choose the image which customer need while sending the gift card product.
- 2 **Price:** Select the price from the price slab that the customer wants to send. The customer can also add his on price, but the condition is that the price amount should be within the price range of the product.
- 3. From: Enter the name of the sender, who will be sending the gift card.
- 4 Recipient Name: Enter the name of the receiver, who will be receiving the gift card.
- 5 Recipient Email: Enter the email of the receiver, who will be receiving the email.
- 6 **Delivery date:** Enter the date of sending the gift card. If the sender wants to send at that moment leave the space as blank and if he wants to send on a particular date, then from the calendar available select the day when he wants to send the gift card to the receiver.
- 7 Having something to say: Enter the text which sender want to show to the receiver in the email template.
- 8 Qty: Enter here the number of coupon codes that sender wants to send to the receiver.

Note: The multicurrency is not supported in this module as of now.

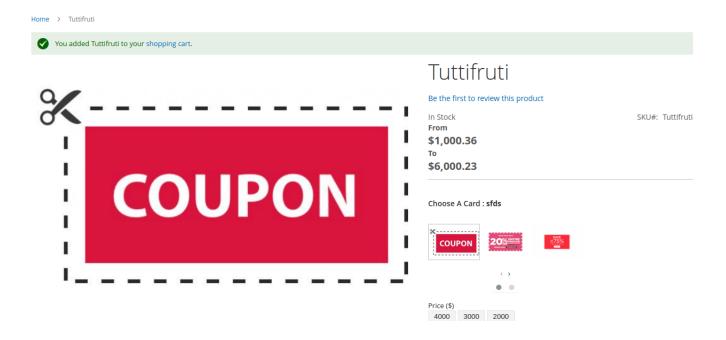
Here, before adding the template to the cart, in order to see how the template would look into the email of the receiver, we have got the button as "Click here to Preview". On clicking it, we can see how the gift card would be visible at the receiver email.



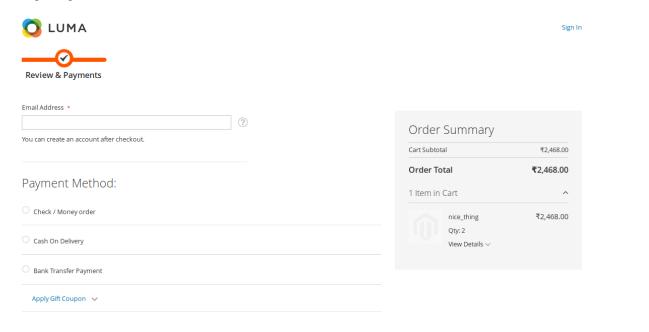


Once, we do so, we click on the "Add to cart" option. After clicking the product would be on the cart.

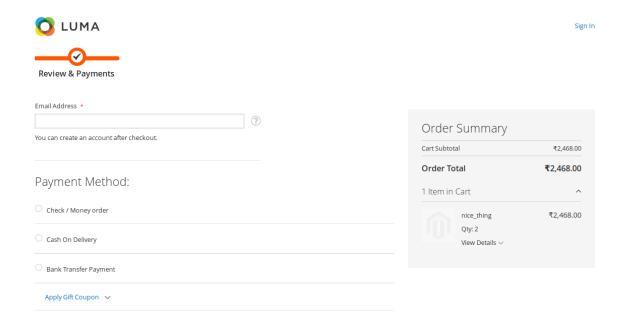
Now, click on the cart button present at the top right corner and press the "**Proceed to checkout**" button. Once, we do so we will be directed to the review and payment page. So, if we are a guest user, we can just give our email address for that.



The next section consists of the payment methods. Here, the customer can choose the payment method of purchasing the gift card.

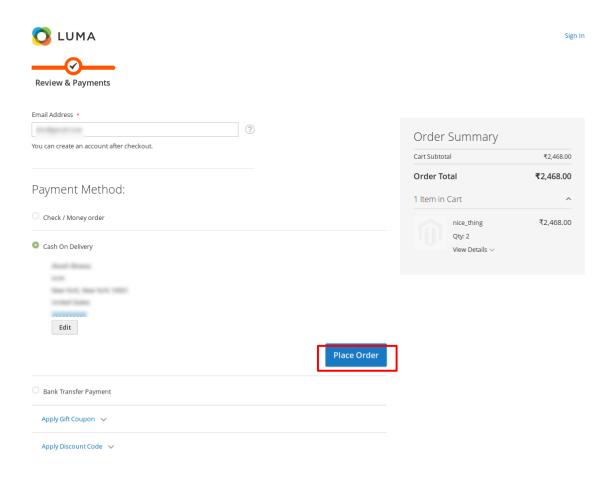


Fill all the options that are available for that payment method.



Once we are done with the data filling for the payment method, we can click on the update button followed by the "Place Order" button.

Note: Gift coupon and Discount Code is not applicable here for the gift card purchase.



Thank you for your purchase!

Your order number is: 000000082.

We'll email you an order confirmation with details and tracking info.

Continue Shopping

For a registered customer, go to payment methods. Here, the customer can choose the payment method of purchasing the gift card.

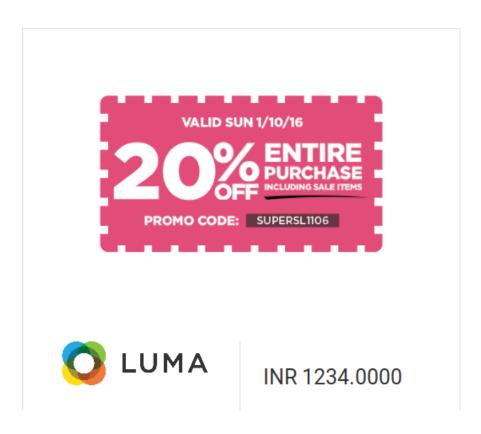
Fill all the options that are available for that payment method.

Once a customer has done with the data filling for the payment method, he can click on the update button followed by the "**Place Order**" button.

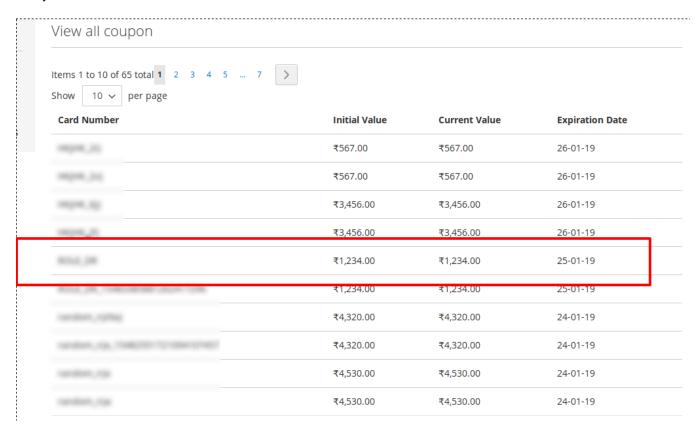
7. Product Purchase: Customer's End by Receiver

The receiver could see the coupon through 2 ways:

1. Either from the email id.



2. My account>Check Gift card values



Email received by the receiver

The receiver would be getting an email, regarding the gift card. Here, the customer could see who had sent the

gift card. Once we click on the gift card, the customer could see the coupons we received. Along with that customer can also see the total amount of gift card the customer received and time of expiration of the gift card.

Customer panel

Once, the customer logged in, if the customer had the gift card coupons then in order to see the gift card coupons, click on the "My accounts section"

Once, customer click on that, a customer will be directed to the My account section. Click on the "Check Gift Card Values".

Once, the customer does so, a customer will see all the coupons that are available for the gift card. The grid shows us the following details:

Card number: This shows us the coupon code.

Initial value: This shows us the original value in the coupon code. **Current value:** This shows us the actual value in the coupon code. **Expiration date:** This shows us when the coupon code is getting expired.

Purchasing the product

Select any product that the customer wants to purchase. Once customer does so, then select to "add to cart" button.

Note: The gift card could be applied to only those product for which "Gift card Checkout Allowed" is enabled.

Now, click on the card button present at the top right corner.

Click on the "Proceed to checkout" button. Once, we click we will be taken to the page, where we need to select the shipping address and the shipping method.

Select the shipping address and shipping method as per the customer choice and click on the "Next" button.

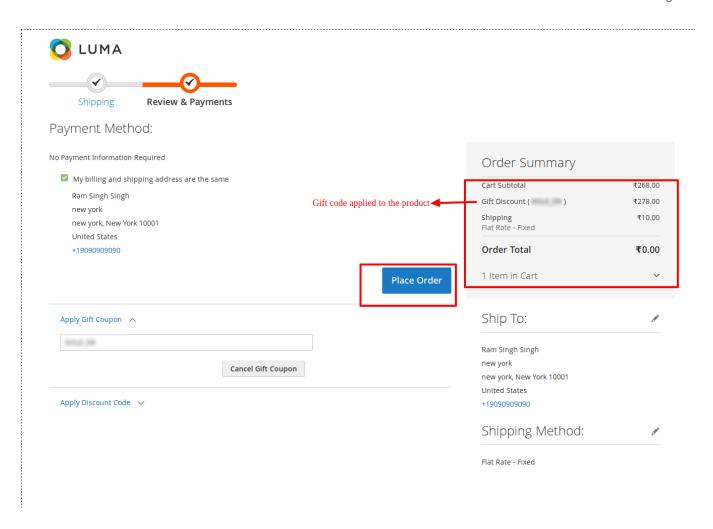
Once we do so, we will be directed to the Payment method page. From the list of payment method choose the payment as per the convenience of the customer

After that, click on "Apply gift coupon" field. Enter the coupon code if a customer has it and click on "Apply gift Coupon". If the coupon code is valid and has the amount, a success message would generate as "Success: Your coupon was successfully applied". If we have the discount code, we can apply that also.

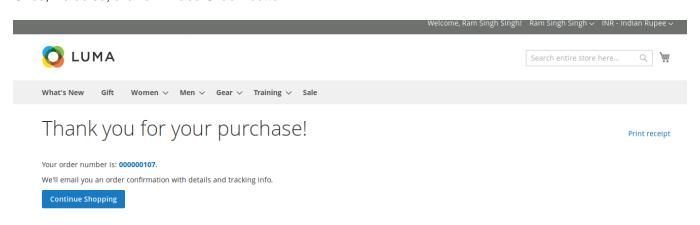
Note: Either the discount code is applied or gift card coupon is applied.

If we look at the "Order Summary" present at the right corner, we could see:

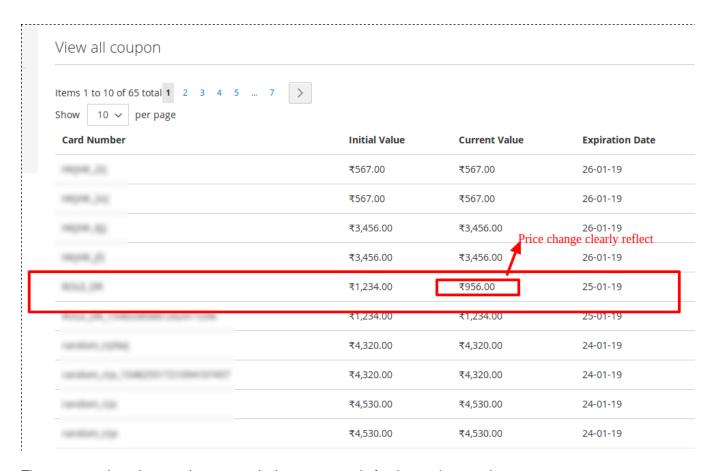
- 1 Cart subtotal: The total amount in the card
- 2 Card discount: If card discount is applied we could see that
- 3 Gift discount: The gift discount that is applied to cart
- 4 Shipping: Shipping amount that is needed to be applied
- **5 Order total:** (Card subtotal+Shipping)-(Giftcart code/Discount code)



Once, we do so, click on "Place Order" button.



On clicking so, we will be taken to the success page where we see the message as "**Thank you for your purchase!**"



The coupon price, change when we apply the coupon code for the product purchase.

8. Support

If you need any further support or have any questions directly related to the Gift card, please use our Online Message Form to contact us or send us an email at support@cedcommerce.com

Best Regards,

eCommerce Team