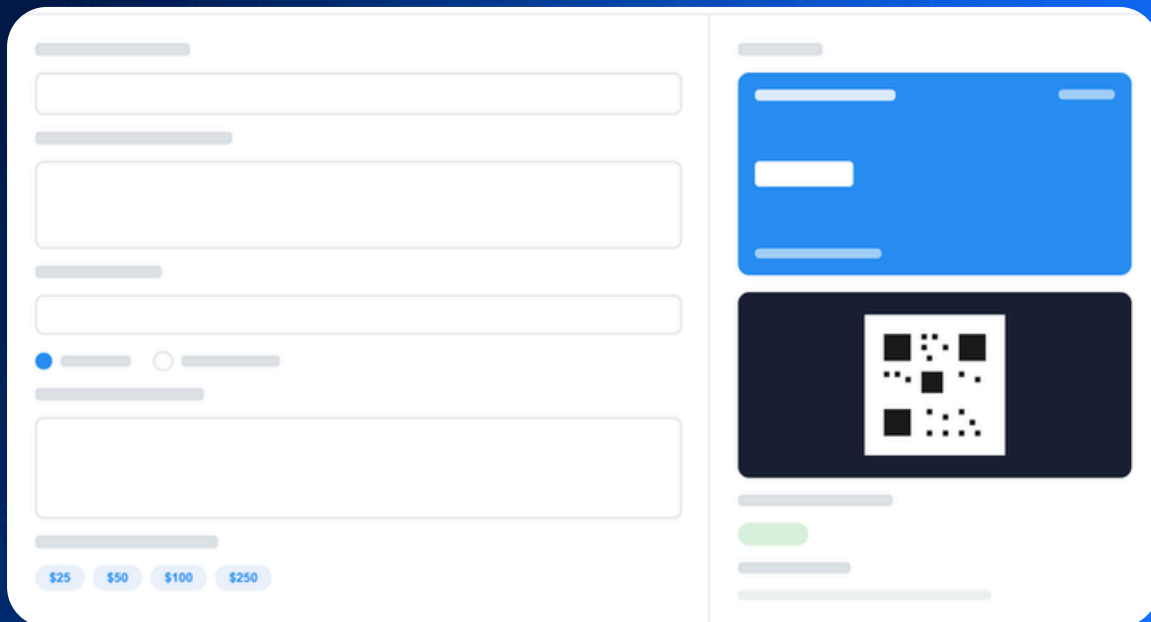


REFERENCE GUIDE

Gift Cards

A complete guide to creating, selling, sending, and redeeming gift cards in your software.



Keep this guide close. It stays useful no matter how many gift cards you create.

What Gift Cards Are & Where They Live

What It Is

A gift card is a prepaid balance. A customer buys or receives a card at a set amount, and the recipient spends it down at checkout until the balance reaches zero. It's a built-in way to drive sales, reward loyalty, and run promotions, without any manual work on your end.

How It Works For Your Business

- Search for Gift Cards: it is where you create, track, and manage every gift card product.
- The Gift Card Orders tab is where you check balances, redemptions, order history, and details for every card that's gone out.
- The dashboard shows four things at a glance: your gift card products, each denomination you offer, order details for buyers and recipients, and balance/redemption activity.
- You can sell a gift card through a checkout, or send one directly to a contact with no payment required at all.
- Gift cards work especially well for holiday specials, referral rewards, customer appreciation, and loyalty campaigns.

Test Mode and Live Mode are kept completely separate. A gift card created or sold in Test Mode only works on test checkouts, and a Live Mode gift card only works on live checkouts.

What Gift Cards Are – Tips & Guidelines

Tips

- Think of your gift card dashboard as the single source of truth for everything gift-card related in your account.
- You don't need a holiday to use a gift card. Customer appreciation and team incentives work just as well.
- Sending a gift card with no payment required is one of the simplest ways to reward a referral or say thank you.
- Review your dashboard regularly, it's the fastest way to see which denominations are actually performing.

DO

- Search for Gift Cards as your home base for this feature
- Use the Gift Card Orders tab to track balances and redemptions
- Treat Test Mode and Live Mode as two separate, non-interchangeable systems
- Review dashboard totals on a regular schedule, not just once

DON'T

- Expect a Test Mode gift card to redeem on a live checkout, or the reverse
- Assume gift cards only work for sales, they also work great for rewards
- Ignore the Gift Card Orders tab once a card is issued
- Forget that sent (not sold) gift cards still count toward your totals

Creating A Gift Card Product

What It Is

Every gift card starts as a product you build once: a name, artwork, one or more denominations, and your terms. Search for Gift Cards, select Create Gift Card and the guided setup walks you through it in a few short steps.

How It Works For Your Business

- Connect a payment integration first (Stripe, PayPal, NMI, Authorize.net, Square, or another supported option). Search for Integrations to set it up.
- Enter basic information: a name, an optional expiration date, an optional redemption URL (or "no link"), and your terms and conditions.
- Choose your artwork: build a gradient card with your own colors and direction, use a pre-designed template you brand to your business, or upload a custom image.
- Set your denominations (for example \$25, \$50, \$75, \$100), an optional quantity limit per denomination, whether to allow sales after stock runs out, automatic tax calculation, and a category.
- Review the preview (card art, denomination, code, QR code, terms, expiration) and select Create Gift Card to finish.

A quantity limit applies separately to each denomination, not to the product as a whole. A limit of 100 on four denominations means up to 400 gift cards total, not 100 combined.

Creating A Card – Tips & Guidelines

Tips

- Set up your payment integration before building your first card, it's the most common missed step.
- Most businesses leave the expiration date blank; add one only if faster redemption genuinely matters to you.
- Save a gradient or template you like so you're not rebuilding your artwork from scratch on the next card.
- A redemption URL works best when you're pointing someone to a specific signup page, funnel, or offer.

DO

- Connect your payment integration before creating your first gift card
- Offer more than one denomination when it fits your business
- Turn on "allow sales after stock runs out" for active promotions
- Save artwork as a reusable template for future cards

DON'T

- Skip the payment integration step and try to create a card anyway
- Set a quantity limit without understanding it applies per denomination
- Forget to add terms and conditions, even a short line helps set expectations
- Assume you can edit the artwork later, it can't be changed after creation

Managing, Editing & Tracking Your Gift Cards

What It Is

As your gift card program grows, your dashboard becomes the place to monitor performance and keep every product current. You can edit, deactivate, or delete a gift card at any time.

How It Works For Your Business

- Five key metrics track performance: total cards issued, total value issued, average order value, number of unique customers, and your top denomination (with a top-5 popularity chart).
- Filter by Today, Yesterday, the last 7 or 30 days, this month, last month, or a custom range, "This Month" is the default view.
- Editing a card lets you update its name, description, expiration, redemption link, terms, denominations, quantity, tax, and category, changes apply to future activity only.
- You cannot edit a card's artwork after it's created. If you want a new look, create a new gift card instead.
- Deactivate a card to stop new sales or sends without losing its history; delete it permanently when you're sure you won't need it again.

Deactivating a product stops its dedicated checkout and store listing, but a card already added to another checkout (a form, funnel, or payment link) keeps working until it's manually removed there too.

Managing & Tracking – Tips & Guidelines

Tips

- Check your top denomination regularly, it's one of the clearest signals of what to promote or expand next.
- If a promotion has ended but might come back, deactivate rather than delete so you can easily turn it back on.
- Test mode transactions never affect your real analytics, so testing is always safe.
- Scheduled gift cards still count toward totals for the date range they're scheduled in.

DO

- Review your five key metrics on a regular cadence
- Deactivate a card you might reuse instead of deleting it
- Remove a deactivated card from any other checkout it's attached to
- Use search and filters to quickly find a specific card or customer

DON'T

- Delete a gift card product you might want again later
- Assume deactivating removes it everywhere at once, other checkouts need manual cleanup
- Try to edit a card's artwork, build a new one instead
- Ignore average order value, it tells you how customers are actually buying

Selling & Sending Gift Cards

What It Is

Gift cards reach customers in two distinct ways: selling, where a customer pays for one through checkout, and sending, where you issue a card directly to a contact with no payment required at all.

How It Works For Your Business

- Sell through a dedicated checkout link (share anywhere, website, funnels, emails, texts), an embed code (drop a working checkout right onto a page), a QR code (great for print and in-person), or your online store.
- You can also add a gift card as a product on an existing form, funnel, payment link, invoice, or calendar.
- To send a gift card: choose the recipient, personalize the message (write it yourself, pick a suggestion, or use AI), choose the amount and a delivery method, then review and send, or schedule it for later.
- Delivery methods depend on the contact's info on file: Email (full visual with artwork), SMS (clean message, no artwork), QR Code via Email, or PDF via Email.
- A business can also redeem a gift card directly during an internal payment collection flow, Orders, Invoices, Charge Now, and Subscriptions all support entering a gift card code to apply its balance toward what's due.

A customer cannot use one gift card to purchase another gift card. Sent gift cards appear only in Gift Card Orders, never in your standard Orders list (search for Orders).

Selling & Sending – Tips & Guidelines

Tips

- The same gift card can sell across every channel at once, all drawing from the same shared inventory.
- Sending works great for loyalty, referral thank-yous, service recovery, and testing your redemption flow.
- Gift cards always live under your Gift Cards screen, even once a card is included in your online store, you'll never manage it from the regular Products screen.
- When collecting payment internally (an invoice, a subscription, a manual charge), only one gift card can be applied per payment, and the balance is applied before any other payment method.

DO

- Share your checkout link across every channel that makes sense for your business
- Use sending for rewards, thank-yous, and recovery, not just selling
- Check which delivery methods are available based on the contact's info
- Apply a gift card balance first, then collect any remaining amount separately

DON'T

- Expect to buy a gift card using another gift card
- Look for sent gift cards under standard Orders, check Gift Card Orders instead
- Try to manage a gift card from the regular Products screen
- Apply more than one gift card to a single internal payment, only one is supported

How Customers Redeem A Gift Card

What It Is

A recipient enters their gift card code (or scans its QR code) at checkout, and the balance applies automatically toward their order. What happens next depends on whether the balance fully covers the total.

How It Works For Your Business

- Supported customer checkouts include forms, funnels, payment links, invoices, your store, and calendars/appointment booking.
- If the balance equals or exceeds a one-time order total, no additional payment is required at all.
- If the balance is less than the total, or the order includes a subscription, checkout collects an additional payment method for the remainder.
- The transaction always shows the gift card amount used as its own separate line item.
- Full redemption support exists on Stripe, NMI, Authorize.net, and Square. PayPal, Adyen, and custom providers support redemption only when the balance fully covers a one-time order, and cannot apply to recurring or subscription products.

There's no dedicated balance-check link yet. For now, the most reliable way to see what's left on a card is to enter it at any supported checkout, the remaining balance displays automatically.

Redemption – Tips & Guidelines

Tips

- Memberships, donation forms, rentals, and older service booking flows do not currently support gift card redemption.
- If your customers use subscriptions, confirm your payment provider offers full (not limited) gift card support.
- A gift card with no remaining balance shows a clear message at checkout letting the customer know it can't be used.
- More redemption features are planned, including order-level validity dates and more fine-grained, product-specific redemption controls.

DO

- Confirm your payment provider before relying on gift cards for subscription sales
- Let customers know up front if a gift card may only cover part of an order
- Check transaction details to confirm the gift card line item applied correctly
- Test a redemption yourself before promoting a new gift card broadly

DON'T

- Assume every payment provider supports gift cards the same way
- Expect gift card redemption to work on memberships or donation forms
- Promise customers a dedicated balance-check page, it isn't available yet
- Forget that a subscription's future recurring payments are never covered by a gift card balance

Using Gift Cards To Grow Your Business

What It Is

Gift cards work best when they feel natural, matched to a season, a holiday, or a community moment. They don't need a big budget to create strong engagement, even a small denomination goes a long way.

How It Works For Your Business

- Think of the year in four friendly phases: winter holidays, New Year, Valentine's Day, summer, and back to school, each has its own natural gift card angle.
- Outside of seasonal moments, gift cards work well as rewards: community drawings, customer appreciation, launch-event giveaways, referral support, and local business partnerships.
- Promote your gift card by adding the checkout link to your email footer, website, and funnels, sharing a short social post, and placing a QR code on printed materials.
- Build your seasonal cards ahead of time so you can reuse them every year with only small updates.
- Track redemptions and activity in your software so you always know which campaigns are actually working.

A simple place to start: one denomination, your brand colors, and a clear description. You can always expand to more denominations and designs later.

Growing Your Business – Tips & Guidelines

Tips

- Keep card amounts simple to understand, and add a short note explaining each card's purpose.
- Match colors or designs to the season or occasion for a more natural feel.
- Announce giveaway winners in a friendly, public way to build excitement for the next one.
- Reuse seasonal cards year over year to save time, small updates are usually all that's needed.

DO

- Start with one clear, simple gift card and build from there
- Plan seasonal cards ahead of the season they're meant for
- Promote your gift card across every channel you already use
- Track performance so you know which ideas to repeat

DON'T

- Wait for a big budget before trying a reward or giveaway card
- Launch a seasonal card without planning ahead of time
- Use confusing or inconsistent amounts across your cards
- Forget to promote a gift card once it's created, visibility drives sales

Key Terms Glossary

Gift Card Product

The card you build and brand, name, artwork, denominations, and terms, that can be sold or sent.

Denomination

A preset dollar amount a gift card is sold or sent at, like \$25 or \$50. A product can offer several.

Gift Card Orders

The tab where every issued card, sold or sent, shows up with its status, balance, and history.

Balance

What's left on a gift card after any redemptions, it counts down from the denomination to zero.

Redemption URL

An optional link included with a gift card that guides the recipient to a specific page to redeem it.

Quantity (Inventory)

An optional cap on how many gift cards can be sold at a given denomination, applied separately to each one.

Deactivate

Turns off a gift card product so it can no longer be sold or sent, without losing its history.

Delete

Permanently removes a gift card product. Use only once you're sure you won't need it again.

Average Order Value

The typical dollar amount customers spend per gift card order.

Top Denomination

The best-selling price point for a gift card product, a signal of what to promote further.

Embed Code

A snippet that places a working gift card checkout directly onto a webpage or funnel.

Full vs. Limited Provider Support

Stripe, NMI, Authorize.net, and Square fully support redemption; PayPal, Adyen, and custom providers support it only when the balance covers a one-time order in full.

Test Mode / Live Mode

Two completely separate environments. A gift card created in one mode only redeems in that same mode.

Gift Card Code

The unique code tied to a specific gift card, entered at checkout to apply its balance.

Business-Initiated Redemption

Applying a gift card's balance directly within an internal payment flow, like an invoice or a manual charge.

Category

A custom label you create to organize your gift card products, for example "General" or "Holiday."

Bringing It All Together

1

Create Your Card

Connect a payment integration, build your first gift card product, and set your denominations.

2

Sell It, Send It, Or Both

Share your checkout link everywhere, or send one directly as a loyalty reward or thank-you.

3

Track What's Working

Check your dashboard regularly, total issued, average order value, and top denomination all tell a story.

4

Build It Into Your Calendar

Plan seasonal and reward cards ahead of time so you're never scrambling to launch one.

You don't need a complicated system, just a few simple cards and a plan for when to use them. That's the perfect gift for everyone: a gift card.

Getting Help

- Keep this guide close any time you're setting up, editing, or troubleshooting a gift card.
- New gift card lessons may be added to this course over time, this guide is built to stay accurate regardless.
- If you have a question this guide doesn't answer, reach out to your support team for help.