



indition Gift Cards

Gift Cards

User Manual

For store administrators and operations staff · Version 1.0 · 2026-07-28

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1. Card Designer & Templates

The card designer creates the visual artwork for issued gift cards. Every card issued from a product uses the design linked to that product — changing the design later does not re-render already-issued cards.

Creating a design

Navigate to **Admin → Shop → Gift Cards → Card Designs → New Design**. The designer opens on a canvas.

- **Canvas size:** Landscape (3.375 × 2.125 in), Square, or Portrait. Choose before picking a template — the canvas shape determines which templates are available.
- **Template:** select a built-in or saved custom template. The design is applied immediately and can be further customized.
- **Logo upload:** PNG file only; max 1 MB; max 1024×1024 px. Logo appears in the upper-left corner of the card.
- **Colors:** background and text color via color picker.
- **Code type:** QR code, barcode (Code 128), or text-only. QR code is recommended for mobile wallet compatibility.

Click **Save Design** to save. Assign a name, optional category, and sort order for organization.

Templates

Built-in templates include: Classic, Refined, Celebration, Minimal, and seasonal sets (Christmas, Thanksgiving, Valentine's Day, St. Patrick's Day, Independence Day, Labor Day, Cyber Monday, Black Friday, USA 250th Birthday, and more). They are always available and never require import.

Custom templates: After creating a design, click **Save as Template**. The design will appear in the template picker for all future designs under a "Custom" section. Templates can be sorted and categorized for easy access.

2. Gift Card Products & Denominations

A gift card product is a special product type in the Shop catalog. Each product is linked to one card design and one expiry configuration. Multiple denominations (price points) are added as sub-products.

Field	Description
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Card Design	The saved design that will be rendered on every card issued through this product.
Expiry Mode	None (no expiry), Fixed Date (same expiry for all cards), or Relative (N months/days after purchase).
Expiry Value	The specific date (Fixed) or quantity + unit (Relative). Unused if expiry mode is None.
Denominations	One or more price points (e.g., \$25, \$50, \$100). Each is a separate purchasable variant.

A single "Gift Cards" product with multiple denominations is simpler than separate products per amount. However, separate products allow different designs or expiry rules per denomination.

3. Storefront Experience (Customer View)

Browsing gift cards

Customers browse gift cards on the Gift Cards catalog page (Listing + Filter widgets). Cards are shown with their design image, name, available denominations, and price. Filters allow narrowing by category or price range.

Purchasing for self

1. Customer selects a denomination and clicks **Add to Cart**.
2. At checkout, the "for myself" option is selected (or no recipient section appears, depending on template configuration).
3. Order is placed. The card is issued immediately in *active* status and appears in My Cards.
4. A purchaser confirmation email is sent with the card image and code.

Purchasing as a gift

1. Customer selects "Give as a Gift" on the product page or at checkout.
2. A recipient details form appears: recipient name, recipient email, and optional personal message.
3. Order is placed. The card is issued in *pending_claim* status.
4. The recipient receives a delivery email with the card image and a claim link.
5. The purchaser receives a confirmation email noting that the card will be delivered to the recipient.

Claiming a gifted card

1. Recipient clicks the claim link in the delivery email.
2. If the recipient already has an account, they log in and the card is immediately added to their My Cards. Status changes to *active*.
3. If the recipient does not have an account, one is auto-created for them (credentials sent in the email), and the card is added to the new account.

The claim link is single-use and contains a signed token. It expires based on the card's expiry settings (if configured). Once claimed, the link cannot be reused.

Redeeming at checkout

1. Customer adds items to cart and proceeds to checkout.
2. In the payment section, enters a gift card code in the gift card code field.
3. The system validates the code and shows the available balance.
4. If the cart total is less than or equal to the card balance, the cart is fully covered — no credit card needed.
5. If the card balance is less than the cart total, the customer pays the remaining amount by credit card.
6. Multiple gift cards can be combined.
7. A gift card cannot be used to purchase gift cards (circular redemption prevention).

4. My Cards (Customer Account)

The My Cards page (</account/my-cards>) shows all gift cards linked to the customer's account.

Column	Description
Card image	The branded card graphic with the code (QR / barcode / text)
Card name	Product name (e.g., "Holiday Gift Card")
Status	Active, Expired, Depleted, Voided
Balance	Current remaining balance
Expiry	Expiry date if set; "Never" otherwise
Wallet buttons	Add to Apple Wallet / Add to Google Wallet (if enabled)

Expired and voided cards are shown with a greyed-out status but remain visible for reference. Depleted cards (\$0 balance) remain visible.

5. Mobile Wallet Passes

When Apple Wallet and/or Google Wallet are configured, customers see wallet buttons on the My Cards page.

- **Apple Wallet:** tapping the button downloads a `.pkpass` file (storeCard type). The system signs the pass with the store's Apple certificate. On desktop, a QR code is displayed that the customer can scan with their iPhone to add the pass.
- **Google Wallet:** tapping redirects to Google's save-to-wallet flow using a signed JWT. The pass appears in the customer's Google Wallet app as a Generic Pass.

Both wallet passes display the card code, current balance, store name, and expiry information.

6. Admin: Issued Cards Grid

Navigate to **Admin → Shop → Gift Cards → Issued Cards**.

Column	Description
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Last 4	Last 4 characters of the card code (for support lookup)
Product	The gift card product linked to this card
Status	active, pending_claim, expired, depleted, voided, pending_payment
Balance	Current remaining balance
Issued to	Customer account or "recipient (pending claim)"
Issued at	Date and time of issuance
Expires	Expiry date or "Never"
Actions	Adjust, Expire, Void, Resend Claim Email

Use the filter controls to search by status, product, last4, or customer. Results can be exported.

7. Admin: Balance Ledger

Navigate to **Admin → Shop → Gift Cards → Ledger**. Every balance event for every card is shown here as an immutable row. The ledger is append-only — no rows are ever deleted or modified.

Entry Type	When it is created
Issue	Card first issued (order paid or gift checkout)
Claim	Pending card claimed by recipient
Redeem	Card balance applied at checkout
Refund	Balance restored after a partial or full refund
Adjust	Admin manually adjusts balance (up or down)
Expire	Admin expires a card; balance zeroed
Void	Admin voids a card

Each row shows the entry type, amount, resulting balance, actor (system or admin username), and timestamp. Filter by card last4, entry type, or date range.

8. Admin: Liability Report

Navigate to **Admin → Shop → Gift Cards → Liability Report**. This report shows outstanding gift card liability — the total dollar value of all active (un-redeemed) cards.

Results are grouped by status and product, with subtotals and a grand total. The grand total is the number your accounting team needs for the balance sheet gift card liability line item. Export as CSV for inclusion in financial reports.

Run this report at the end of each accounting period and reconcile against your general ledger's deferred revenue account.

9. Admin: Card Operations

Adjust balance

Select a card in the Issued Cards grid and click **Adjust**. Enter the new balance amount. The system creates an *adjust* ledger entry with the delta. The adjusted balance cannot exceed the card's face value unless the admin has raise-balance permission.

Expire a card

Click **Expire** on any active card. The card status changes to *expired*. The remaining balance is zeroed and an *expire* ledger entry is created. The card can no longer be used at checkout.

Void a card

Click **Void** on any card that has not been depleted. The card status changes to *voided*. A *void* ledger entry is created. Voiding a card with a balance does not refund the purchaser automatically — handle any refund separately through the order's refund flow.

Resend claim email

For any card in *pending_claim* status, click **Resend Claim Email**. A new delivery email is sent to the recipient address recorded on the card. A new signed claim token is generated; the previous token becomes invalid.

10. Orders with Gift Card Tender

When a customer redeems one or more gift cards at checkout, the order record shows the gift card tender alongside any credit card payment.

- Order summary shows each gift card's last 4 and the amount applied from that card.
- Credit card charge covers any remaining amount after gift card(s) are applied.
- `shop_order_gift_card` records each card-to-order attribution with the exact amount from each card.

11. Refunds & Cancellations

When an order that includes gift card tender is refunded or cancelled, the system offers options for how to restore the gift card value.

Partial refund

In the refund modal, after selecting items to refund, a gift card breakdown section shows the split between gift card value and credit card charge for the selected items. Three restore modes are available:

Mode	Behavior
Proportional (default)	Gift card and CC portions are restored proportionally to the original split
Gift cards only	Entire refund is credited back to gift card(s); no CC refund issued
Manual	Admin specifies the exact restore amount per card

If applicable, a discount clawback tooltip shows the portion of the refund that is offset by a discount that applied only to the gift-card-covered items.

Full cancellation

The cancellation modal presents the same three restore modes. Additionally:

- Any gift cards in *pending_claim* status from this order are voided automatically on cancellation.
- If a card that was redeemed on the original order is now expired, the system prompts for a new expiry date before restoring balance to that card.
- If a card has been voided since the original order, its restore share is redistributed to the remaining live cards.

