Gift Cards
Magento Extension

User Guide

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1. Extension Description

Gift Cards Magento Extension adds some magic of gift-giving process to your shop. The add-on allows customers to buy gift cards of different types and lets admins configure all the necessary options in a flexible and seamless way.

Gift Card Types – choose one of the three types of gift cards:

- Email Gift Card (a code is sent via email to a recipient)
- Print-Out Gift Card
- Mail Gift Card (a physical Gift Card delivered by post office).

Gift Cards Pricing – assign individual values to gift cards using one of the 3 pricing schemes:

- a fixed price (the gift card value can't be changed)
- a drop-down with a predefined list of prices
- a price range (a gift card amount can be chosen within the price range set by the store admin).

Partial Payment – let customers spend the full or participial gift card amount to pay the transaction.

Full Backend Control – specify gift card value, balance and currency. Create gift cards for different Store Views. Set expiration time span.

Manage Gift Cards with API – control every aspect of gift cards in your shop: create/delete, manage, view gift card(-s) without the necessity to log in to the Admin panel.

Gift Cards Usage – allow both registered customers and guests to use gift cards. Let shoppers display custom gift messages/images on gift cards. Redeem gift card codes in a separate block both in a shopping cart and during the checkout.

Pre-generated Gift Codes – allow customers to pre-generate a certain amount of gift card codes.

Export / Import – export Gift Cards codes into .csv and .xml files. Import gift card information into your Magento store.

2. Extension Installation

To install the extension, please follow the steps below:

1. Disable the *Compilation Mode* (if enabled).

2. Log out from *Magento Admin Panel* (if logged in).

3. Unpack the contents of the *Extension folder* (depending on your current Magento version) from the package file purchased from Mageworx to your Magento root folder.

4. Log into *Magento Admin Panel*.

5. Go to *System → Cache Management*, select the *Refresh* option under the *All Cache* drop-down menu and press the *Save Cache Settings* (if Cache Control is enabled in Magento).

6. Enable the *Compilation Mode* back (if necessary).

7. Go to *System → Configuration → Webtex→ Gift Cards*. If you see the Gift Cards section, the installation is done.

Note! To display gift card codes in the Order View section, insert the following

`<?php echo Mage::helper('giftcards')->getUsedGiftCards($_order- >getId())?>` after line 47 in the file app/design/adminhtml/default/default/template/sales/order/view/tab/info.phtml
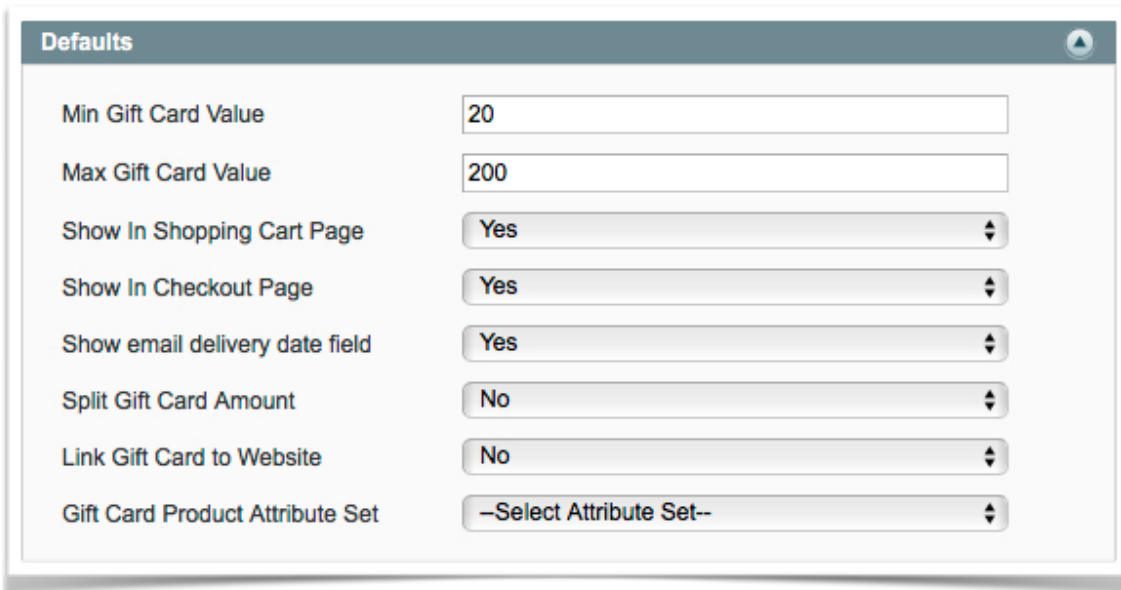
Note! Check the shopping cart page on the front-end. If the Gift Card Block is missing, insert it manually:

1. Find the file cart.phtml here app/design/frontend/default/<your design>/template/checkout/cart.phtml

2. Find the line with "<?php echo $this->getChildHtml('coupon') ?> and *below* it insert the following code <?php echo $this->getChildHtml('giftcards') ?>

3. General Settings

To configure the Gift Cards extension settings, go to _System - Configuration - Webtex - Gift Cards._
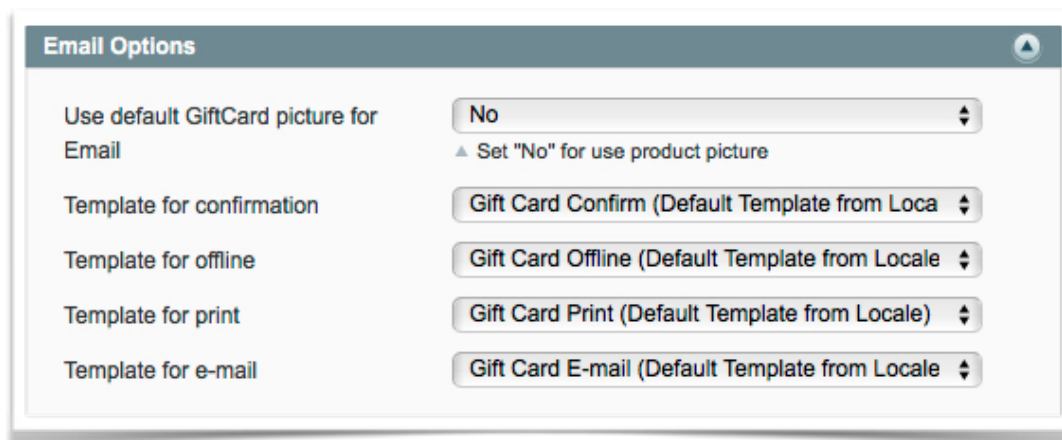
The Defaults section settings:

- _Min/Max Gift Card Value_ – limits the price range for the gift cards.
- _Show in Shopping Cart Page_ – allows users to apply Gift Cards in the shopping cart.
- _Show in Checkout Page_ – allows users to apply Gift Cards during the checkout.
- _Show Email Delivery Date Field_ – lets users set an email delivery date.
- _Split Gift Card Amount_ – allow users to split the Gift Card amount.
- _Link Gift Card to Website_ – links a Gift Card to a specific Website.
- _Gift Card Product Attribute Set_ – specifies the attribute set for a Gift Card Product.

The Email Options section:

- *Template for confirmation* – sets the template for the confirmation page.
- *Template for offline* – specifies the template for the offline Gift Card page.
- *Template for print* – defines the template for the print Gift Card page.
- *Template for email* – sets the template for the email Gift Card page.

Gift Card Email Templates

When an Email Gift Card is sent, the following template will appear in the inbox:
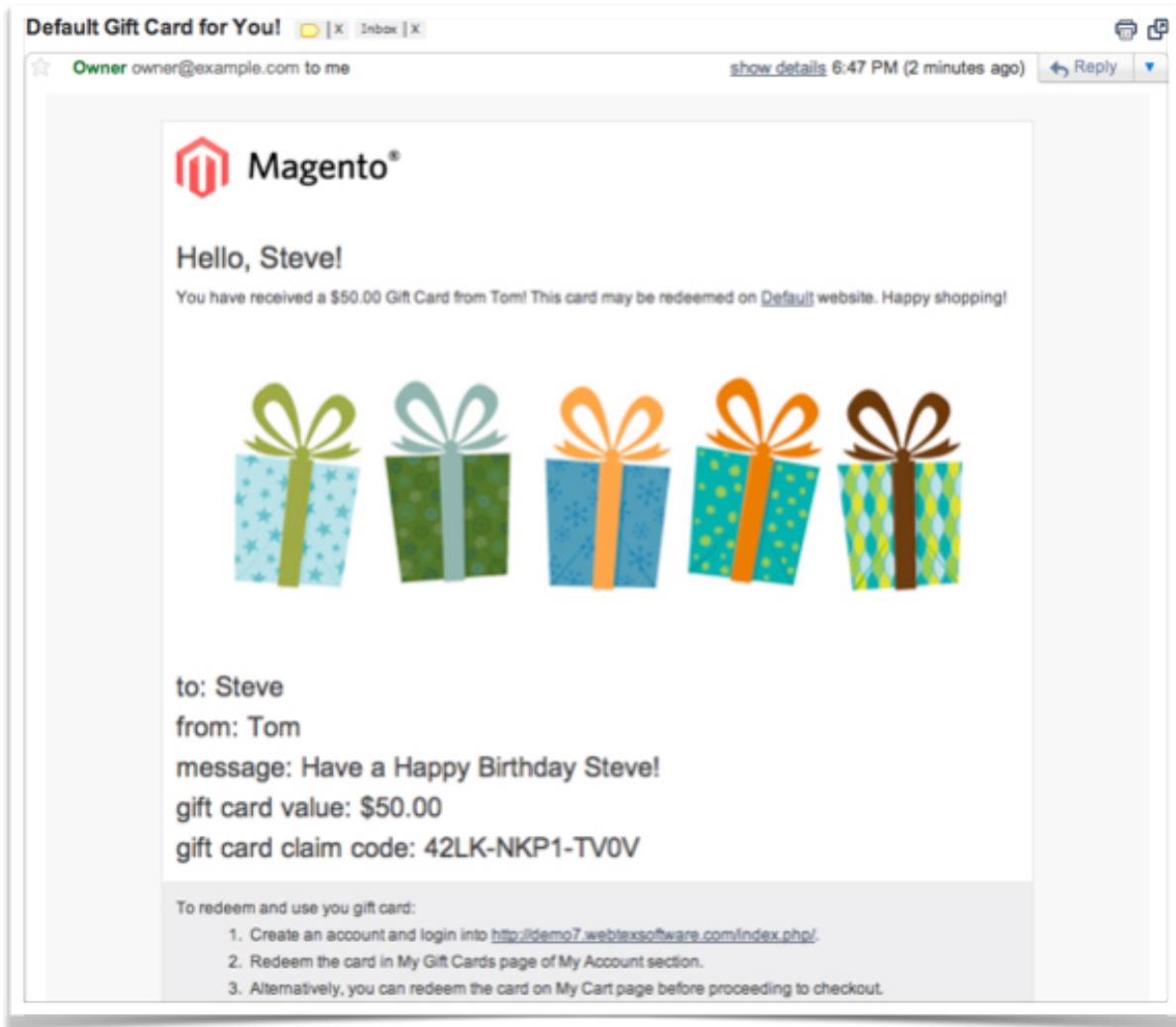
When a Print Gift Cards is purchased, the customer receives an email similar to this one:
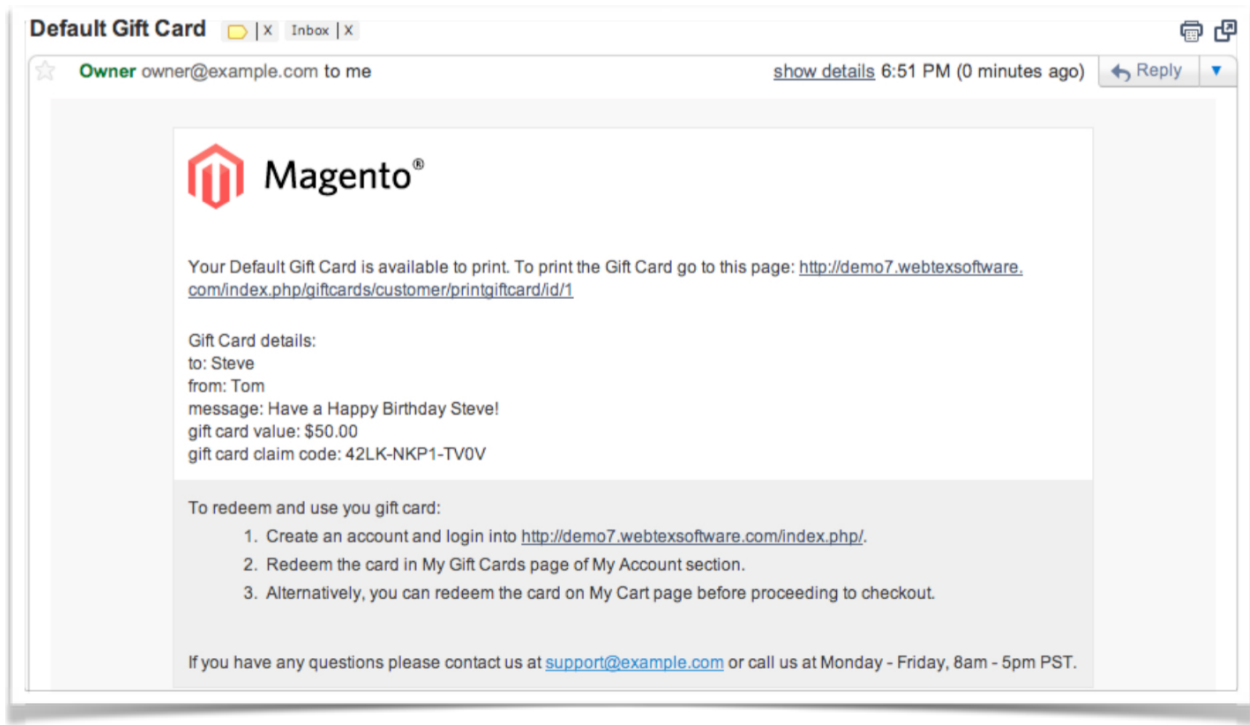
4. Gift Card Product Creation

Gift Card is a prepaid card that can be purchased and used in your shop by customers.

To create a new Gift Card product, you need to go through the standard product creation procedure.

Jump to _Customers - Gift Cards - Gift Card Products_ or _Catalog - Manage Products_ and hit the _Add (Gift Card) Product_ button. Set the Product Type to _Gift Card_ from the dropdown and press _Continue_.
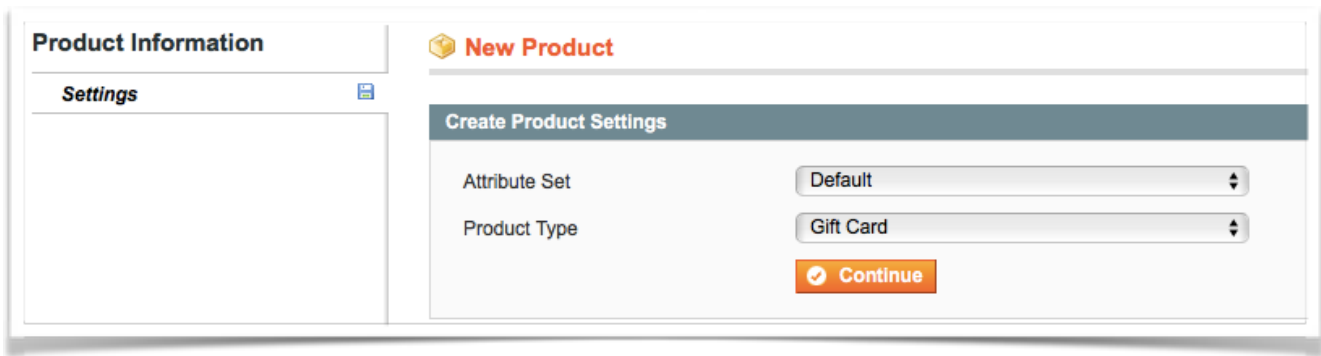
Under the General tab, fill in the required fields:

- **Name** – the gift card name (usually corresponds to its type).
- **SKU** – Stock Keeping Unit (identifies the new product in your shop).
- **Status** – enables or disables product.
- **Tax Class** – lets you choose a suitable tax class.
- **Visibility** – allows you to select where the Gift Card product would be visible in your shop.
- **Gift Card Type** – lets you choose the appropriate Gift Card type:

Email - a code is sent via *email* to a recipient;
Offline - a physical gift card delivered via a *post office*;
Print - a gift card that you can print at home.
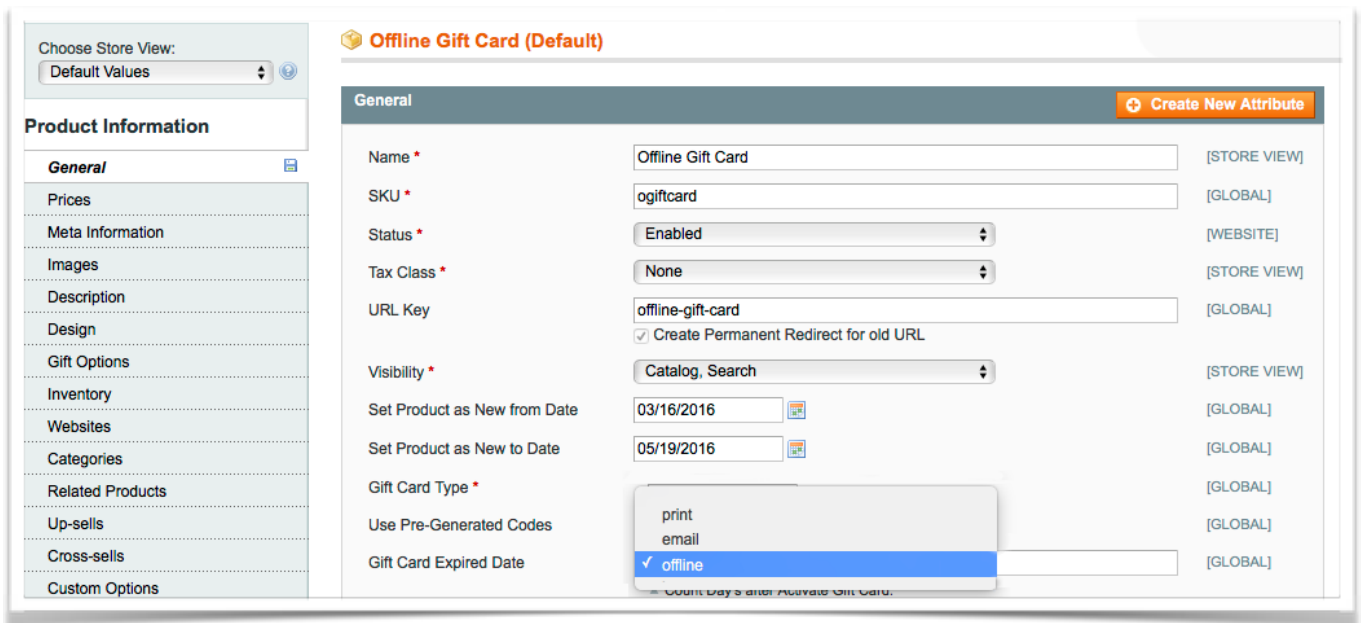
You can also fill in the optional fields:

- *URL Key* – a unique value used to build a user-friendly URL.
- *Set Product as New from Date* – marks product as new from a specific date.
- *Set Product as New to Date* – marks product as new until a specific date.

- *Use Pre-Generated Codes* – allows pre-generating codes for selected type of a Gift Card product.
- *Gift Card Expired Date* – specifies the date after which a gift card is no longer in effect.

5. Gift Card Pricing

Under the Price tab, you can set one of the three types of prices for a gift card:

1. **Fixed price** - the gift card value can't be changed on the front-end;

2. **Price Range** - set the price as 0 to allow customers enter their own amount for Gift Cards;

Note! The price range min and max value is specified under <u>System - Configuration - Gift Cards.</u>

3. **Predefined prices** - set a list of prices customers can choose from.

6. Gift Cards Back-End Management

To track the list of all gift cards or create/edit gift cards, go to _Customers – Gift Cards – Manage Gift Cards_.

Gift Cards Creation

To create a new Gift Card**,** jump to _Customers - Gift Cards - Manage Gift Cards_ and hit the _Add New Gift Card_ button.

Here is what each of the setting does:

- _Enter Card Code_ – lets you manually enter a Gift Card Code if the checkbox _Generate Card Code_ is disabled.
- _Number of Gift Cards_ – sets the number of cards created at a time.

- *Card Currency* – chooses the appropriate Gift Card Currency from the list of the supported currencies in your shop.
- *Status* – specifies the current Gift Card status from the Active, Inactive, Used, Expired or Refunded.
- *Gift Card Store* – defines the store view with available Gift Cards.
- *Gift Card Expiration Date* – specifies the date after which the Gift Card is no longer in effect.

Recipient Info

The extension allows entering/changing the Recipient Info when creating/editing a Gift Card:

Here is what each of the settings does:

- *To Name* – the name of the recipient;
- *To Email* – the email of the recipient.
- *From Name* – the name of the sender.
- *Message* – a custom Gift Card message.
- *Mail Delivery Date* – the final date when a gift card must be delivered.

Gift Cards Codes Export

Newly created Gift Cards can be instantly exported to .csv file:

1. Enable the checkbox *Save Gift Cards Codes to CSV;*
2. Specify the *Path to Export Gift Cards Codes* or leave it as is.

7. Gift Card Code Redeem

Gift Cards can be used both by *registered customers and guests*. When someone need to redeem a Gift Card code, he has two options:

1. To redeem and use it right *on the shopping cart page.*

To redeem a Gift Card a user will simply need to enter a Gift Card code and hit the *Activate* button*.* The Gift Card amount will be automatically deducted from the cart total.

2. To redeem the gift card code *during the checkout:*

In both ways customer can spend a full or a participial Gift Card amount to pay for the transaction.

8. Pre-Generated Gift Card Codes

The Gift Cards Extension allows pre-generating Gift Card codes. You can generate any amount of codes and easily manage them in the back-end.

To activate the Pre-Generating Gift Cards Codes option do the following:

1. Jump to *Customers – Gift Cards – Gift Cards Product*;
2. In the *General* tab switch the *Use Pre-Generated Codes* option to *Yes* and hit the *Save* button. The *Pre-Generated Codes* tab in the left Product Information menu should appear.
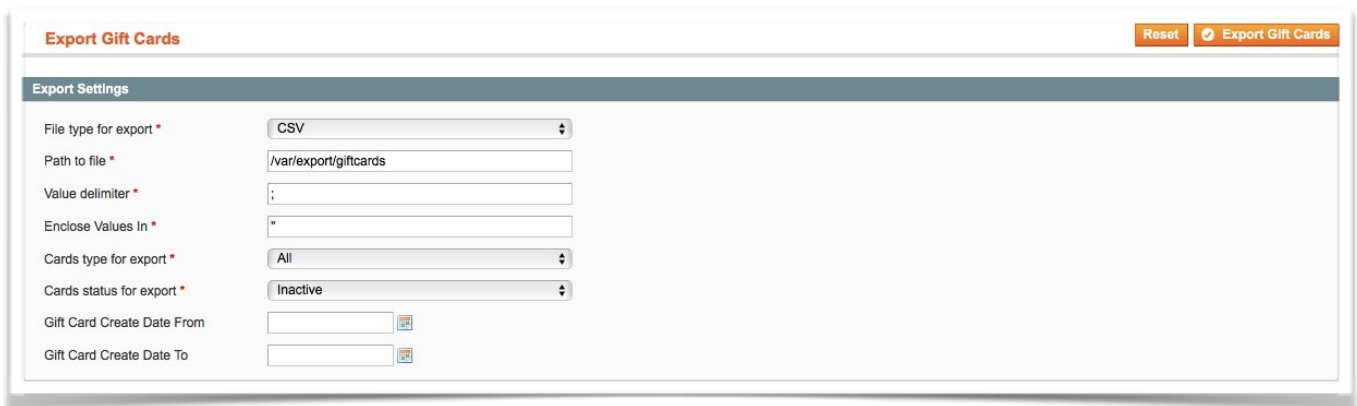
Open the *Pre-Generated Codes* tab in the left Product Information menu, enter the amount of pre-generated codes and hit the *Generate* button. When the codes were generated, you can monitor how many codes have been sold and how many are still available.

9. Gift Card Codes Export/Import

Depending on how you plan to use your gift certificates, you may want to distribute your gift codes in different ways.

Export

The extension can export a list of generated gift codes in a .csv or .xml file. Jump to *Customers - Gift Cards - Export Gift Cards*. Set *File type*, *Cards type* and *Cards Status*, then choose the appropriate export dates. Hit the *Export Gift Cards* button to complete the operation and save the result.
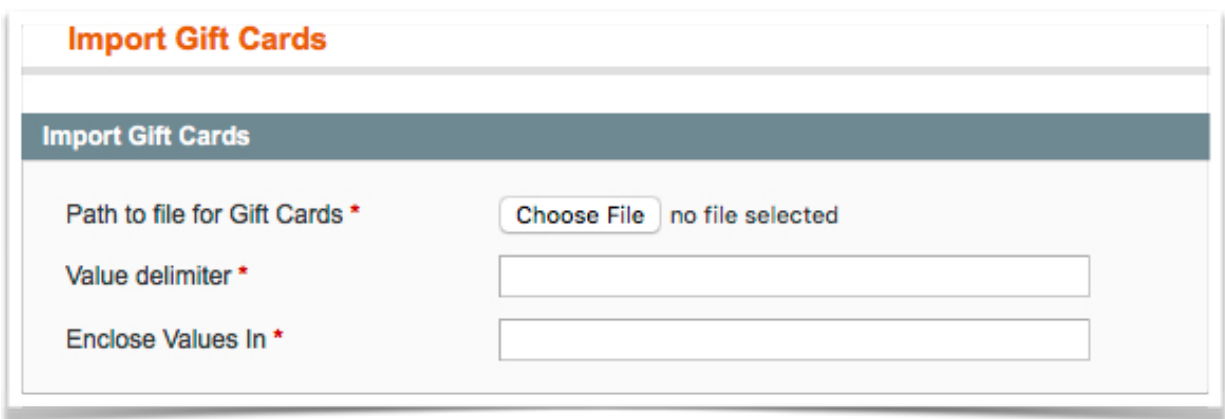

Import

The extension allows you to import the gift card information into your Magento store from .csv or .xml files. Go to *Customers - Gift Cards - Import Gift Cards*, choose the file to import and press the *Import Gift Cards* button.

11. Support

GOT QUESTIONS?

MageWorx offers FREE lifetime support and updates for any extension developed for Magento.

Need help with the extensions? Feel free submit a ticket from http://support.mageworx.com

GETTING HELP WITH MAGENTO

MageWorx offers outstanding services developing custom tailored solutions for Magento platform to attain your eCommerce objectives.

Our professional impassioned team provides profound and custom oriented development of your project in a short timeframe. You are most welcome to contact us at sales@mageworx.com