SL Gift Cards & Store Credits

Sell, issue, and track gift cards and store credit balances

Version 1.0.11 | WordPress Plugin User Manual

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1. Overview

SL Gift Cards & Store Credits adds two related but distinct balance systems to your WooCommerce store: sellable, transferable **gift cards** (physical or e-gift, with their own card numbers), and per-customer **store credit** balances you issue directly (refunds, compensation, loyalty).

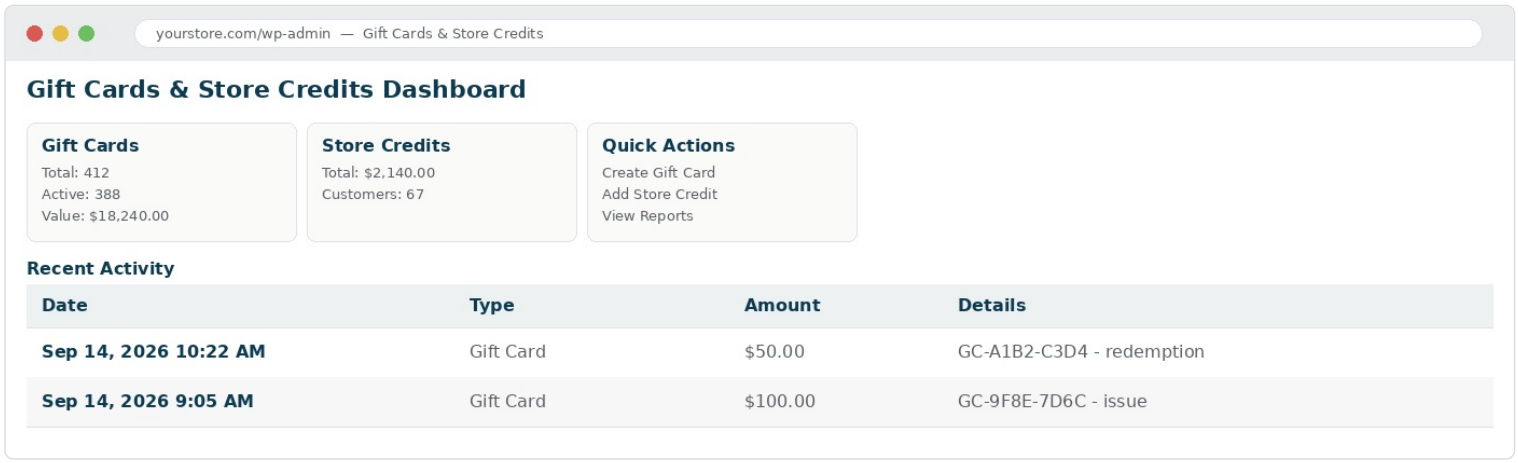
- **Gift cards** — physical or e-gift, auto-generated or custom card numbers (scannable barcodes supported), linked to a customer or fully anonymous
- **Combine gift cards** — transfer a card's remaining balance onto another active card
- **Store credit** — a running balance per customer, added or deducted with a reason on file
- **Reports** — issued/redeemed totals, top customers, transaction history, and a customer lookup tool
- **Import/Export** — bulk CSV for both gift cards and store credits
- **Customer-facing** — My Account balance viewing, linking, and combining; Cart/Checkout redemption
- **POS Integration** — apply gift cards and store credit directly from Streamline POS

Component	Minimum
WordPress	5.8
WooCommerce	Required, active
PHP	7.4

2. Installation

1. Go to **Plugins → Add New → Upload Plugin**, select the ZIP, and click **Install Now**, then **Activate**.
2. A new **Gift Cards** menu appears in the WordPress admin sidebar, with eight pages: Dashboard, Gift Cards, Create Physical Card, Store Credits, Add Store Credit, Reports, Settings, and Import/Export.
3. Go to **Settings** (Section 8) and fill in your Store Information before creating any physical gift cards — this is what actually prints on them.

3. Dashboard



Dashboard — totals for both systems, quick actions, and recent activity.

Go to **Gift Cards** — this loads as the first page automatically.

Card	Shows
Gift Cards	Total Cards (all statuses), Active Cards, and Total Value (sum of current balances on active cards only)
Store Credits	Total Credits (sum of every positive balance across all customers) and how many distinct Customers hold a balance
Quick Actions	Create Gift Card, Add Store Credit, View Reports

Recent Activity lists the 10 most recent gift card transactions — date, type, amount, and the card number with its transaction type (issue, redemption, transfer, etc).

4. Gift Cards

4a. The Gift Cards List

Go to **Gift Cards → Gift Cards**.

1. Search by card number, recipient email, or notes.
2. Each row shows: Card Number, Balance (current / initial), Status, Customer (or "Anonymous"), Type (Physical or E-Gift), Recipient, and Created date.
3. Actions per row: **Edit** (4c), **Combine** (4d — only shown for an active card with a balance greater than $0), and **Deactivate**/**Activate**.
4. **Delete** only appears on an already-inactive card — active cards can't be deleted directly, since you'd deactivate first as a safeguard against removing a card that's still usable. Deleting is permanent and also removes that card's transaction history.

4b. Create Physical Card

Go to **Gift Cards → Create Physical Card**.

1. **Card Number** — scan a barcode directly into this field or type one in, or leave it blank to auto-generate one in the `GC-XXXX-XXXX-XXXX` format.
2. **Amount** — the initial (and starting current) balance.
3. **Link to Customer** — optional; attaches the card to a real customer account so they can see it under My Account (Section 9). Leave as "No Customer" for a fully anonymous card.
4. **Card Type** — Physical Card is checked by default (enables the printable layout below); uncheck it if you're creating this one as a record for an e-gift card instead.
5. **Internal Notes** — optional, staff-only.
6. Click **Create Gift Card**.

> **After creating a card, a printable layout appears immediately** — your store logo (if uploaded in Settings), store name, "GIFT CARD," the card number, and the dollar value, with your store address and phone at the bottom. Click **Print Gift Card** to print it directly; the customer-account and screen-only details are automatically excluded from the printed version.

4c. Edit Gift Card

Reached via the **Edit** button on any card in the list (4a) — not in the main menu.

Card Number and Initial Balance are locked and shown read-only. You can change: **Current Balance** (to manually correct it), **Status** (Active/Inactive), **Recipient Email**, and **Notes**. Customer, Type, Created date, and Expiration (if set) are shown for reference only.

4d. Combine Gift Cards

Reached via the **Combine** button on an active card with a balance (4a) — not in the main menu.

1. The source card (**From Card**) and its current balance are shown, pulled from whichever card you clicked Combine on.
2. Type the **To Card Number** — the destination card that will receive the balance. It must already exist and be active.
3. Click **Combine Cards**.

The entire balance moves from the source to the destination card; the source card's balance becomes $0 (it isn't deleted or deactivated automatically — do that separately from the list if you want it fully retired). Both sides of the transfer are logged in the transaction history (Section 6).

> **This always transfers the full balance** — there's no option to move a partial amount. To split a balance instead of combining it, use Edit Gift Card (4c) to manually adjust both cards' balances.

5. Store Credits

5a. The Store Credits List

Go to **Gift Cards → Store Credits**. Lists every customer who currently holds a positive balance — Customer, Email, Balance, sorted highest balance first — with an **Add/Deduct** button per row that jumps to 5b with that customer already selected.

> **Only positive balances are listed here.** A customer with a $0 or negative running total won't appear on this screen — use Add Store Credit (5b) directly and search for them by name if you need to adjust their balance from zero.

5b. Add Store Credit

Go to **Gift Cards → Add Store Credit** (or click Add/Deduct from the list in 5a).

1. **Search Customer** — type to find by name or email. If you arrived from the list (5a), their current balance is already shown.
2. **Action** — Add Credit or Deduct Credit.
3. **Amount** — always entered as a positive number regardless of direction; the Action dropdown determines whether it's added or subtracted.
4. **Reason** — required, e.g. "Compensation for issue," "Loyalty reward," "Refund to store credit."
5. **Notes** — optional additional detail.
6. Click **Update Store Credit**. A confirmation shows the customer's new balance immediately.

6. Reports

Go to **Gift Cards → Reports**.

Date Range

Choose a preset window or **Custom** with your own From/To dates. Some figures (like current outstanding balances) are always store-wide "as of now," regardless of the range — only the issued/redeemed activity figures are actually scoped to the selected range.

Gift Card Activity

Total Issued (all time), Active Count, Outstanding Value (sum of active balances right now), plus Issued and Redeemed totals for the selected date range specifically — so you can see both your current overall liability and recent activity side by side.

Card Type Breakdown

Physical vs. e-gift cards, all time.

Charts

Gift cards issued per day, and redemptions per day, across the selected range.

Top Gift Card Customers & Highest Store Credit Balances

Two ranked tables for the selected period — your biggest gift card holders, and the customers currently sitting on the largest store credit balances.

Gift Card Transactions & Transaction History

A detailed, filterable log of every individual transaction — issues, redemptions, transfers (from combining cards), and admin adjustments.

Customer Lookup — Gift Cards & Store Credits

Search for one specific customer to see everything about their account in one place: every gift card linked to them plus their full store credit activity history, without having to cross-reference the Gift Cards and Store Credits lists separately.

7. Settings

Go to **Gift Cards → Settings**.

Store Information (For Gift Card Printing)

Everything here appears directly on printed physical gift cards (Section 4b) — fill this in before creating any:

Field	Notes
Store Name	Required
Store Address	Full address, shown on the printed card
Store Phone	
Store Logo	Upload an image file — shown at the top of the printed card

Gift Card Settings

- **Enable Gift Cards** — turns the whole gift card system on/off
- **Gift Card Expiry (Days)** — set to 0 for cards that never expire
- **"Buy More Gift Cards" Link** — the URL shown to customers on their My Account gift card page (Section 9) inviting them to purchase another. Defaults to your Shop page filtered to a gift-certificates category; a few example formats are shown right on this settings screen.

Store Credit Settings

Enable Store Credits — turns the whole store credit system on/off.

8. Import / Export

Go to **Gift Cards → Import/Export**.

Export

Download your current Gift Cards or Store Credits data as CSV.

Import Gift Cards

Click **Download Template** for a correctly-formatted starting file.

Column	Required?
card_number	Required, must be unique
initial_balance	Required
current_balance	Required
status	Required — active or inactive
customer_email	Optional
recipient_email	Optional
notes	Optional
is_physical	Optional — yes or no
expires_at	Optional — YYYY-MM-DD

Import Store Credits

Column	Required?
customer_email	Required — must match an existing user account exactly
amount	Required
notes	Optional
expires_at	Optional — YYYY-MM-DD

9. Customer-Facing Features

My Account → My Gift Cards

Logged-in customers can view all gift cards linked to their account, check balance and transaction history for each, **link a received card** by entering its number, and **combine cards** themselves.

Cart & Checkout

- Apply a gift card on the Cart or Checkout page using the "Apply Gift Card" field
- Remove an applied card with a single click
- A $0 checkout notice appears if the gift card fully covers the order total
- Applied cards persist in the session across page loads

10. POS Integration

When **Streamline POS** is active alongside this plugin, the POS checkout screen gains an **Extensions** tab:

Sub-tab	What it does
Gift Cards	Enter a gift card number to apply it to the current transaction, with real-time balance validation
Store Credits	Shows the current customer's balance and lets you apply all or part of it to the order
Coupons	Apply WooCommerce coupon codes to the POS cart

The customer's store credit balance also appears directly in the customer profile panel whenever a customer is loaded at the terminal.

> **Permissions:** gift card issuance and store credit adjustments from the POS respect the permission levels configured in Streamline POS settings.

11. Troubleshooting & Quick Reference

Issue	What to check
Can't delete a gift card	Only inactive cards can be deleted (Section 4a) — deactivate it first, as a deliberate safeguard against removing a still-usable card.
Combine button missing on a card	Only shows for a card that's both Active and has a balance greater than $0 (Section 4a).
Combine Gift Cards says destination not found	The "To" card must already exist and be Active — you can't combine into a card you haven't created yet, or one that's inactive.
Printed gift card is missing the logo/address	Fill in Store Information under Settings (Section 7) before creating the card — this can't be added retroactively to an already-printed card.
Customer doesn't appear on the Store Credits list	Only customers with a positive balance are listed (Section 5a) — use Add Store Credit and search by name for anyone at $0 or below.
CSV import fails	Download the template first (Section 8) and match its columns exactly — card_number must be unique, and store credit imports require an exact, existing customer_email match.
POS Extensions tab for gift cards/credits isn't showing	Confirm Streamline POS is active and the user's POS permissions include this extension (Section 10).

Create a physical gift card to print	Create Physical Card → fill in amount → Create → Print
Issue store credit for a refund	Add Store Credit → search customer → Add Credit → reason
Move a balance from one card to another	Gift Cards list → Combine (on the source card) → enter destination card number
See a customer's full gift card + credit picture	Reports → Customer Lookup
Bulk-load existing gift cards or credits	Import/Export → Download Template → fill in → Import
Set what prints on physical cards	Settings → Store Information

12. Version History

What's changed in each release of SL Gift Cards & Store Credits, in plain language — for reference and troubleshooting.

Version	Date	What Changed
1.0.11	—	Fixed store credit/gift card amounts being deducted or restored twice on POS orders and returns. Added CSV exports to the Reports page — including customer-specific exports from Transaction History and Customer Lookup (Section 6) — and a picker for when a customer search matches more than one person. Fixed HTML showing up inside CSV export files.
1.0.8	—	Security hardening (nonce verification on checkout and admin handlers, safer redirects, escaped output) and internal cleanup — no visible feature changes.
1.0.4	—	Initial release: gift card management with e-gift and physical card support (Section 4), store credit tracking (Section 5), WooCommerce checkout integration (Section 9), My Account integration (Section 9), combine/edit gift cards (Section 4c, 4d), CSV import/export (Section 8), and Streamline POS integration (Section 10).

About the dates: these releases predate this Version History section, so exact ship dates aren't recorded — entries are backfilled from the plugin's own changelog, which doesn't include every intermediate version (1.0.5–1.0.7, 1.0.9–1.0.10 have no changelog entries). Every future update gets a dated row here going forward.