

SOP: Gift Card Expiry

Customer Service > Gift Card Expiry · Oct 26, 2026 · @Ivy

Purpose

Use this SOP to contact customers whose gift cards are about to expire, so they use the card or get it extended before it lapses, and to record what happened. Every gift card is **one row** on the list. The row shows when it expires, who is dealing with it and what the outcome was, so nothing depends on memory. The pictures use made-up sample customers and card numbers.

Who does what

Role	What they do
Admin	Adds each gift card, contacts the customer, sets the status and writes a note, and keys the new expiry when it is extended.
Manager	Looks at the list and the count on the tab, and chases anything still marked To contact as the expiry gets close.

Before you start

- You are signed in to the ERP and can open **Customer Service**. Without edit access you can read the list, but the status menus and the + **Add card** button are not available.
- For a new card you have the **customer's name**, **contact number**, the **8-letter gift card number**, the **amount** and the **expiry date**.

Steps

Step 1 — Open the list and read it

Go to **Customer Service** > 🎁 **Gift Card Expiry**. The list opens on the cards that expire from today through the next 30 days, soonest first.

Complaint Cases

★ Reviews

🕒 Return OT · Owed hours

1 Gift Card Expiry (2)

Deposits & Refunds

📄 Manual Deposits

📄 Policy Follow Up

Training Dates & Model Slots

👉 Ingrown Nail Tech

✳️ Outlet Machines & Equipment

📄 Final Roster

Service Matrix

🎁 Gift card expiry

The list opens on cards expiring from today through the next 30 days, soonest first. When a card was extended, the new expiry is the one that counts. A card expiring within 7 days is highlighted. Search looks through every card. Status and notes are stored on this list and shown on the customer's CRM profile — they are not copied into a second place.

2

🎁

NEXT 30 DAYS

4

from today, soonest first

🕒

EXPIRED

1

effective expiry has passed

📅

NOT YET DUE

2

more than 30 days away

📄

ALL

7

every card, 50 at a time

3 + Add card

4 Export CSV

5 Search name, phone or card no

Next 30 days 6

NAME	CONTACT	AMOUNT	GIFT CARD NO	EXPIRY	NEW EXPIRY	APPOINTMENT	SERVICE BOOKED	NOTES	ADMIN	STATUS
7 Sample Customer A	65 9123 4560	\$200.00	ABCDEFGA	29/10/2026					Sample Admin	To contact 7 days
Sample Customer B	65 9123 4561	\$100.00	ABCDEFGB	04/11/2026				WhatsApp sent, waiting for reply	Sample Admin	Contacted
Sample Customer C	65 9123 4562	\$300.00	ABCDEFGC	09/11/2026		12/11 & 13/11	Hydra facial	booked at Kovan	Sample Admin	Booked
Sample Customer E	65 9123 4564	\$50.00	ABCDEFGE	17/11/2026					Sample Admin	To contact

1 The tab shows a number in brackets: the cards in the next 30 days that still need someone to contact them. The same number is on the **Gift cards to contact** card at the top of Customer Service. 2 The four tiles switch the list: **Next 30 days**, **Expired**, **Not yet due** (more than 30 days away) and **All**. 3 **+ Add card** (Step 5). 4 **Export CSV** downloads the rows that match the filter. 5 **Search** by name, phone number or card number. A search looks through **every** card and pauses the date filter. 6 The date filter box does the same as the tiles. 7 A card that expires **within 7 days** is shaded amber with a **7 days** tag: contact these first. A card whose date has passed is grey with a **Passed** tag. When a card was extended, the **New expiry** is the date that counts.

Step 2 — Contact the customer and set the status

Message or call the customer. Then, on the right of the row, set what happened. Scroll the table sideways to see the right-hand columns.

NEW EXPIRY	APPOINTMENT	SERVICE BOOKED	NOTES	ADMIN	STATUS	CRM	UPDATE
				Sample Admin	To contact	No CRM match Last visit — · Outlet — Bookings are not imported from Fresha	To contact Edit Delete
			WhatsApp sent, waiting for reply	Sample Admin	Contacted	No CRM match Last visit — · Outlet — Bookings are not imported from Fresha	Contacted Edit Delete
12/11 & 13/11	Hydra facial	booked at Kovan		Sample Admin	Booked	No CRM match Last visit — · Outlet — Bookings are not imported from Fresha	Booked Edit Delete
				Sample Admin	To contact	No CRM match Last visit — · Outlet — Bookings are not imported from Fresha	To contact Edit Delete

1 The **Status** of the card (Step 3). 2 The **CRM** box shows the matching customer profile with their last visit and outlet, found by phone number. It says **No CRM match** when none is found. 3 The **status menu**: choose the new status and it saves at once. 4 **Edit** opens the full card (Steps 4 and 5). 5 **Delete** is only for a row added by mistake (Step 7).

Always write what you did in the **Notes** (for example “WhatsApp sent 27/10, no reply” or “called, booking 5 Nov”), through **Edit**. The note and the status also show on the customer's CRM profile.

Step 3 — What each status means

Status	Use it when	Still counts as “to contact”?
To contact	Nobody has reached the customer yet	Yes
Contacted	You messaged or called, and are waiting for a reply	No
Booked	The customer booked a service to use the card	No
Extended	The expiry was extended and a new expiry is keyed	No
No need	The customer does not need to be contacted	No
Expired	The effective expiry has passed	No (shows on the Expired tile)

If you leave the status on **Auto** in the Edit box, the page works it out from the card: a date in the past is **Expired**; notes saying “no need” give **No need**; an appointment or service booked gives **Booked**; a new expiry gives **Extended**; notes saying texted, WhatsApp, called, informed, contacted, emailed or sms give **Contacted**; anything else is **To contact**. A status you pick yourself always wins.

Step 4 — Extend the expiry

When the card is extended, press **Edit** on the row and fill in the **New expiry**.

Edit gift card

NAME *

CONTACT

Sample Customer D

65 9123 4563

AMOUNT \$

GIFT CARD NO *

150

ABCDEFGD

EXPIRY *

1

 / EXPIRY

28/10/2026

28/11/2026

APPOINTMENT DATE

SERVICE BOOKED

15/10 & 16/10

ADMIN

2

 STATUS

Sample Admin

Auto

NOTES

extended 1 month, informed by call

Leave status on Auto to take it from the notes, the appointment, the new expiry, or the date. Dates are dd/mm/yyyy.

Cancel

Save

1 New expiry as dd/mm/yyyy. From now on this date is the one that counts: the card leaves the 30-day list until the new date gets close. Keep the original **Expiry** as it is, so the history stays. **2 Status**: leave on Auto (it becomes Extended) or pick **Extended**. Add a line in **Notes** saying who agreed and when. Press **Save**.

Step 5 — Add a gift card

Press + **Add card**. Fill in the boxes and press **Save**.

The screenshot shows a mobile app interface for adding a gift card. The form is titled 'Add gift card' and has a close button (X) in the top right corner. The form is divided into two columns. The left column contains fields for: 1. Name (required), 2. Amount \$, 3. Expiry (required), 5. Appointment date, and 7. Notes. The right column contains fields for: CONTACT (phone number), 2. Card no (required, 8 letters), 4. New expiry, SERVICE BOOKED, and 6. Status (Auto). At the bottom, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red circle and the number 8.

1 **Name** (required) and **Contact** (the phone number is how the CRM profile is found). 2 **Gift card no** (required): exactly **8 letters**. The same number cannot be added twice: edit the existing row instead. 3 **Expiry** (required) as dd/mm/yyyy, and it must be a real date. 4 **New expiry** only if it was already extended. 5 **Appointment date** and **Service booked** once the customer books. 6 **Status**: leave on **Auto** unless you want to set it yourself. 7 **Notes**. 8 **Save**. The new row appears on the list, in the right place by date, and the numbers on the tab and the Customer Service card update.

A gift card can also be added straight from a customer's CRM gift card list: the name, phone, expiry and amount come across.

Step 6 — Find an old card, or check what has expired

- To find one card, type the name, the phone number or the card number in **Search**.
- Press the **Expired** tile to see cards whose effective expiry has passed. Press **All** to see every card, 50 at a time (use **Next** and **Previous**).
- Press **Export CSV** to download the rows that match the filter.

Step 7 — Delete only a row added by mistake

Press **Delete** on the row and confirm. Do not delete a card that was contacted, booked or has expired: change its status instead, so there is a record.

Where else it shows

- **Customer Service top cards: Gift cards to contact** counts the cards in the next 30 days that are still **To contact**. Once you set Contacted, Booked, Extended or No need, the card drops out of the count.
- **Customer Service Analysis:** an insight line tells the admin how many cards expire within 30 days.
- **CRM:** the customer's profile lists their gift cards with the same status and notes. Changing them in either place changes both, because it is one record.

Checks and tips

Start with the amber rows. A card expiring in 7 days or less is the most urgent: contact it first, and do not leave it on To contact.

Always leave a note. Write the date and how you contacted the customer. The next person should not need to ask.

Use the new expiry, not a new row. When a card is extended, key the New expiry on the same row. Do not add the card again.

Check the card number. It is exactly 8 letters. A card that will not save usually has a typo or is already on the list.

Weekly check. Open **Next 30 days** once a week and make sure nothing is still on To contact.