

# GiftPlanr™

## User Manual

AI-Powered Gift Recommendations

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*Never miss a moment that matters.*

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# 1. Getting Started

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GiftPlanr™ takes the stress out of gift-giving. Whether you need a great idea right now or want to stay ahead of every birthday, anniversary, and holiday on your calendar, you're in the right place.

You can use the Gift Finder on the home page without creating an account. When you're ready to do more, a free account gives you:

- Save the people you shop for — with their interests, occasions, and your gift notes all in one place
- Get email reminders before birthdays, anniversaries, holidays, and other events — so nothing sneaks up on you
- Save gift ideas for later and come back to them any time
- Track what you've purchased or given
- See all upcoming occasions in a visual monthly calendar

## 2. The Gift Finder

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The Gift Finder is right on the home page — no account needed. Just tell us a little about who you're shopping for, and our AI gets to work finding personalized ideas.

### Gift Finder Fields

- **Age:** The recipient's age (1–150)
- **Gender:** Male, Female, or Other
- **Approximate Budget:** Choose from \$25, \$50, \$100, \$200, or \$500
- **Relationship:** How you know them (e.g., Parent, Friend, Spouse/Partner, Colleague)
- **Occasion:** What you're celebrating (e.g., Birthday, Christmas, Anniversary, Graduation)
- **Interests & Hobbies:** A few words about what they enjoy — e.g., “golf, cooking, reading”
- **Gift Guidance & Exclusions:** Optional notes for the AI — e.g., “No cookbooks, they already have 50 of them”

### Running a Search

Click “Have AI Search the WWW for Perfect Gift Selections” to submit the form. A loading screen will appear while the AI works. Results typically arrive within a few seconds.

Every gift recommendation card shows:

- **Product Name**
- **Description**
- **Why this gift is a great fit** for your recipient
- **Estimated price range**
- **“View on Amazon”** — opens the product on Amazon in a new tab

### Amazon-Only Search

Prefer to shop directly on Amazon? Click “Run an Amazon Only Gift Search” to open a targeted Amazon search in a new tab based on your inputs.

### Saving Results to Your List

After running a search:

- **Not logged in?** A “Save this person to my list” button appears. Click it to create a free account — you’ll be taken directly to a pre-filled profile so saving takes just one more click.
- **Logged in?** An “Add this person to my list” button appears. Click it to go straight to a pre-filled profile and save them instantly.

### 3. Sign Up — It's Free

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Ready to get the most out of GiftPlanr™? Signing up takes less than a minute and unlocks everything the app has to offer — reminders, your personal gift list, saved ideas, and more.

To sign up, click “Save this person to my list” after a gift search, or click Login in the navigation bar and choose to create an account.

#### What You'll Fill In

- **Your name:** How you'd like GiftPlanr™ to address you
- **Email address:** Used to log in and receive gift reminders
- **Password:** Minimum 8 characters
- **Confirm password:** Just to make sure it's right
- **Terms & Privacy Policy:** Click the links to read each — you'll need to agree to continue

Click “Save & Continue” and you're in. If you ran a gift search first, you'll land directly on a pre-filled profile — one more click and they're saved to your list.

Prefer to keep browsing first? Click “Continue Without Saving” to close the window without creating an account.

## 4. Logging In

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Click Login in the navigation bar, enter your email and password, and you're in.

- **Remember me on this device:** Check this to stay logged in for 30 days without re-entering your password.
- **Show/hide password:** Click the eye icon in the password field to toggle visibility.

## 5. Forgot Your Password?

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No worries — it happens to everyone. On the Login screen, click “Forgot your password?”, enter your email address, and click “Send Reset Link”. Check your inbox for a reset link from GiftPlanr™.

On the reset page:

- Enter your new password (minimum 6 characters)
- Confirm your new password
- Click “Reset Password”

A confirmation message will appear as soon as your password has been updated.

## 6. Your Dashboard

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Your Dashboard is gift-planning headquarters. After logging in, click Recipient List in the navigation bar to see everyone on your list and what's coming up — sorted so the most urgent occasions are always front and center.

### Urgency Colors

Upcoming occasions are color-coded so you can spot the time-sensitive ones instantly:

- **Red:** 7 days or fewer — act soon!
- **Yellow:** 8–14 days away
- **Blue:** 15–30 days away

### Sorting and Filtering

- **Sort by Date:** All upcoming occasions in chronological order (default)
- **Sort by Name:** Occasions grouped under each person in an expandable list
- **Calendar:** Switch to a monthly calendar view — see Section 11 for details
- **Show Inactive:** Include people you've marked as inactive
- **Show People with No Occasions:** Show anyone on your list who doesn't have occasions set up yet — automatically checked if that applies to anyone

### Quick Actions

Every person on your list has a row of action buttons:

- **Gift icon:** Get AI gift recommendations for that person and occasion
- **Heart icon:** View saved gift ideas for that person
- **Pencil icon:** Edit their profile
- **Toggle icon:** Mark them as active or inactive
- **Trash icon:** Remove them from your list

### Adding Someone New

Click "+ Add Recipient" in the upper right corner of the dashboard to open a blank profile.

### Email Reminder Settings

At the top of the dashboard you can quickly adjust your reminders:

- **Email me reminders:** Toggle reminder emails on or off
- **Weeks in advance:** Choose how far ahead you'd like to be notified (1–4 weeks)

Click Save to apply.

## 7. Adding People to Your List

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The more GiftPlanr™ knows about each person on your list, the better the gift ideas get. Click “+ Add Recipient” from the dashboard, or click the pencil icon to update someone’s profile.

### Basic Information

- **Name:** Their name (required)
- **Gender:** Male, Female, or Other
- **Relationship:** How you know them
- **Year of Birth:** Used to calculate their age for gift recommendations
- **Interests:** Comma-separated hobbies and passions — e.g., “hiking, photography, coffee”
- **Approximate Budget:** What you typically like to spend on them
- **Gift Guidance & Exclusions:** Anything the AI should know — what to avoid, what they already have, what they love
- **Active:** Uncheck to hide someone from your dashboard without removing them entirely

### Recurring Occasions

Select the occasions that repeat every year for this person. For date-specific ones (Birthday, Anniversary, and custom occasions), a date picker will appear so GiftPlanr™ knows when to send your reminder.

Fixed holidays — Christmas, Valentine’s Day, Easter, Mother’s Day, Father’s Day, Thanksgiving — don’t need a date, just check the box.

Available recurring occasions:

- Birthday
- Anniversary
- Christmas / Holiday Season
- Valentine’s Day
- Easter
- Mother’s Day
- Father’s Day
- Thanksgiving
- Other #1, #2, #3 — name and date anything not on the list above

## One-Time Occasions

One-time occasions send a single reminder and are then marked complete. Just enter the date:

- Graduation
- Wedding
- Baby Shower
- Housewarming
- Retirement
- New Job
- Other #1, #2, #3 — name and date any custom one-time event

## Saving

Click “Save Recipient” for a new person or “Update Recipient” for an existing one. Click Cancel to discard any changes.

## 8. Getting AI Gift Ideas

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This is where the magic happens. Click the gift icon next to any person and occasion on your dashboard, and a recommendation panel opens — pre-loaded with their profile and the occasion — ready to search.

You can also click “Find Gifts” from within someone’s profile to get general gift ideas for them at any time.

Each recommendation card shows the product name, description, why it’s a great fit, estimated price, and a link to view it on Amazon.

## 9. Saving Gifts for Later

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Spotted something perfect? Click “Save to List” on any recommendation card and it’s safely stored for later — no need to remember it yourself or keep a browser tab open.

Your saved ideas are always accessible from:

- The heart icon next to any person on your dashboard
- The Saved Items view linked from the dashboard

## 10. Your Saved Gift Ideas

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All your saved ideas live in one place. Click the heart icon next to any person on your dashboard to see what you've set aside for them, or browse everything across your whole list.

### What Each Saved Item Shows

- **Product Name:** The name of the gift
- **Description:** What it is and what makes it great
- **Why it was suggested:** The AI's reasoning for recommending it
- **Estimated Price:** Price range at the time of the recommendation
- **Store:** Where to get it (e.g., Amazon)

### What You Can Do With Saved Items

- **View on Amazon:** Jump straight to the product page in a new tab
- **Mark as Purchased:** Flag it as bought — it stays visible so you remember what you got them
- **Remove from List:** Permanently delete the saved item

## 11. The Occasions Calendar

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Love seeing the big picture? The Occasions Calendar shows every upcoming occasion across all the people on your list in a month-by-month view — color-coded by type so you can spot what’s coming at a glance.

### Opening the Calendar

From your Dashboard, click the Calendar button (next to Sort by Date and Sort by Name). The list view is replaced by a full monthly grid. Click Calendar again to switch back.

### Getting Around

- ← Prev: Go back one month
- Next →: Go forward one month
- Today: Jump back to the current month instantly

Today’s date is highlighted so you always know where you are.

### Reading the Calendar

Each day shows colored chips for any occasions falling on that date — the chip shows the person’s name and the occasion. If a day has more than three occasions, a “+X more” button appears. Click it to see the full list for that day.

### Color Guide

- **Purple:** Birthday
- **Pink:** Anniversary
- **Red:** Christmas / Valentine’s Day
- **Teal:** Mother’s Day / Father’s Day
- **Amber:** Easter / Thanksgiving
- **Blue:** One-time occasions (Graduation, Wedding, etc.)
- **Green:** Custom recurring occasions

### Checking Saved Gifts from the Calendar

See a ♥ next to a name? That means you already have saved gift ideas for that person. Click

any chip to open a panel showing what you've saved — handy for a quick check without leaving the calendar.

## 12. Gift Guides

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Not sure where to start? Our Gift Guides are curated collections of crowd-pleasing ideas organized by recipient and budget. No account needed — just browse, click, and shop.

### Finding the Gift Guides

Click Gift Guides in the navigation bar, or go to [giftplanr.com/guides/](https://giftplanr.com/guides/). The landing page shows all available guides with a short description and budget range for each.

### Available Guides

- **Best Gifts for Mom** — Under \$50
- **Best Gifts for Dad** — Under \$50
- **Best Birthday Gifts** — Under \$30
- **Best Christmas Gifts** — Under \$100
- **Best Last-Minute Gifts** — Under \$25

### Using a Guide

Each guide lists six handpicked gift ideas with a description and estimated price. Click “View on Amazon” on any item to open an Amazon search for that product in a new tab.

At the bottom of every guide, a “Try the AI Gift Finder” link takes you to the home page where you can get a recommendation personalized to your specific recipient and budget.

## 13. Account Settings

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Everything about your GiftPlanr™ account is in one place. Click My Settings in the navigation bar anytime to make changes.

### Account Information

Shows your name, email address, the date you joined, and your total estimated gift budget across everyone on your list for the next 12 months.

### Notification Settings

- **Email Reminders:** Toggle reminder emails on or off
- **Reminder Weeks in Advance:** Choose how far ahead you want to be notified — 1 to 8 weeks

Click “Save Notification Settings” to apply.

### Recommendation Settings

- **Recommendations per Search:** Choose how many gift ideas the AI returns each time — anywhere from 1 to 12. The default is 6.

Click “Save Recommendation Settings” to apply.

### Update Email Address

Enter your new email address and current password, then click “Update Email”.

### Change Password

Enter your current password, then your new password (minimum 8 characters) and confirm it. Click “Change Password” to save.

## 14. Navigation

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The navigation bar is at the top of every page, giving you quick access to everything.

### Always Visible

- **GiftPlanr™ (logo):** Takes you back to the home page
- **About:** Learn about GiftPlanr™
- **FAQ:** Frequently asked questions
- **Gift Guides:** Browse the curated gift guide library
- **Login:** Opens the login screen (shown when you're not logged in)

### When You're Logged In

- **Recipient List:** Your gift-planning dashboard
- **Saved Items:** All your saved gift ideas
- **My Settings:** Your account settings
- **Logout:** Signs you out

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