

Getting started with Smartix Studio

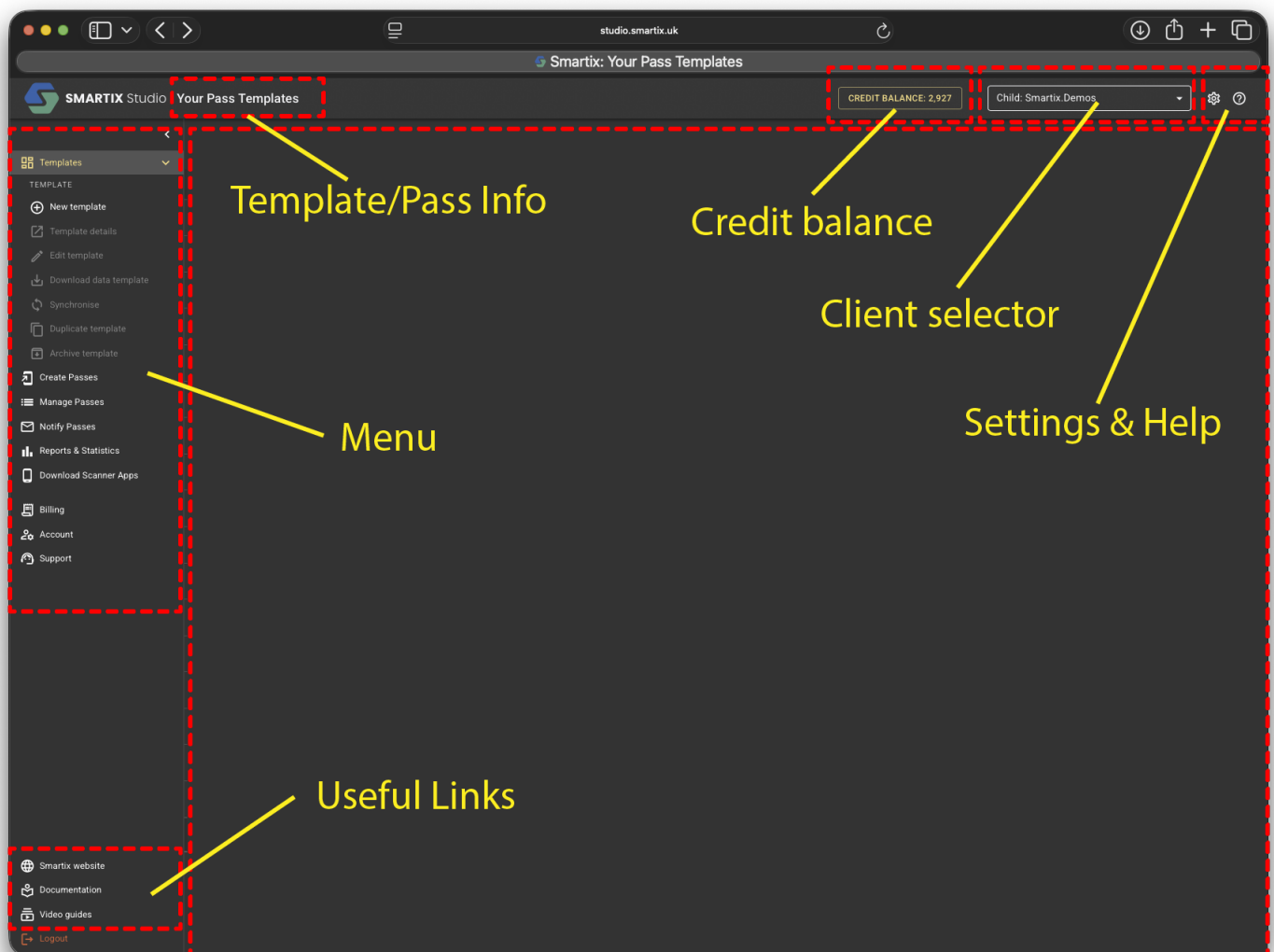
Introducing Smartix Studio.

Smartix Studio is our web application that you will use to design and manage your pass templates. This applies to all users, regardless of whether you will manage your passes from within Studio or externally via our API, Shopify plugin or Zapier plugin, or our customer self-signup for loyalty and stamp cards.

Before you can issue any passes, you must design at least one template. This guide will touch upon that, but refer our [YouTube](#) channel for more in-depth tutorials.

Overview

The screenshot below shows the main parts of the Smartix Studio application interface.



[Website](#)

[Smartix Studio](#)

[Documentation](#)

[YouTube](#)

[Demo Passes](#)

[Template /Pass Info](#)

This will show your currently selected template name and pass ID if you have either of those selected.

This is useful to confirm which template/pass you are working on.

[Menu](#)

This is the main navigation menu. As you select top level items, the menu will expand to show additional options relevant to your current selection.

[Useful links](#)

Links to the Smartix main website, our documentation site and our YouTube channel. You can find more details about pass types, using Studio, API, Shopify and Zapier here along with instructional videos.

[Credit balance](#)

Here you can see your current credit balance. This includes both free and paid credits. If you have purchased a credit bundle, you will also have a small overdraft allowance. This is not shown here. [Click here](#) to show more details and to purchase credits.

If you move from PAYG to one of our monthly contract plans, then credit balance is no longer applicable and will not be shown.

[Client selector](#)

This is only applicable if you have an agency account, you can manage templates for your own clients separately. This gives you separation of templates per clients, allows separate API keys and users for each client. Contact us via support if you require an agent account.

[Settings & Help](#)

Settings allows you to quickly toggle setting such as application theme, editor settings etc.

Every page has its own help. Click the help icon to display this.



Your list of templates

Once you have been through signup and onboarding, this will be your default view when you log into Studio. It shows a list of your current (active) templates along with some useful information about those templates.

When you first log into your account your list will have a single sample pass template so you can explore more quickly. This is a managed loyalty card template, so is compatible with Smartix Scan. You can edit and use this pass if it suits your needs, or just archive/delete it and create one that meets your needs. We'll cover creating new templates later on.

Template Name	Template ID	Synchronisation	Template Group	Smartix Scanner	Issued	Current	Expired
Alice Loves Crafting Loyalty	smartix_loyalty_M1B_E5M_D2B_2G0_DBT	No sync required	loyalty		124	49	0
Aston Martin	other_s_VJC_9L8_C9A_5Y7_Q5M	No sync required	other		4	3	0
Auto Rescue	generic_A0G_0B7_770_FMJ_QNB	No sync required	other		0	1	0
Black & White Club	smartix_membership_EKP_L31_RAB_MPA_BNY	No sync required	membership		41	32	1
Black car owners club	membership_6D4_V6P_6HD_AR2_4FU	No sync required	membership		4	4	0
Earthquake monitor	generic_29K_02Q_97A_C7N_D8B	No sync required	other		5	1	0
Food & Drink co. Coffee offer	offer_YAL_9CW_G1L_OQK_YK7	Check required	offer		0	0	0
Gamestore Gift Card (managed)	smartix_gift_KAC_92M_86V_6YW_YGC	Check required	gift		8	0	0
Gamestore Giftcard	giftCard_N4H_M3_URE_8N9_GUV	Check required	gift		0	0	0
Lunar Republic Backstage Pass	other_P16_2C6_D22_YAF_M05	Check required	other		0	0	0
Mermaid's Bar Stampcard	stamp_J5W_7PU_QGF_FAB_KX9	Check required	stamp		21	2	0
Riverside vs Northbridge	event_UVG_AYD_WTH_L8B_RBW	Check required	event		0	0	0
Summer Athletics	event_MUA_AXC_2LH_QP9_WB3	Check required	event		5	0	0
Today in history	other_e_MSK_K88_1WW_PTX_F41	No sync required	other		1	1	0
Widget Test	other_2_Y0M_C4Y_WKN_H9N_9U2	Check required	other		0	0	0
Wine Club Loyalty Card	loyalty_EDV_V1W_QNP_JHF_65F	Check required	loyalty		24	24	0
Wine World	smartix_event_YRD_SLJ_F29_6B0_KFT	Check required	event		0	0	0
Totals					5	237	117

Template name & ID

Every template is allocated an ID by Smartix. You can also provide a more memorable name for each. Click the template ID to copy it to your clipboard.

Synchronisation status

This status shows whether a check / sync is required to update issues passes with any design changes. We'll cover this in more detail later on.

Affected

Shows the number of passes that require synchronisation

Template group

Template group just shows you the type of pass template.

[Website](#)[Smartix Studio](#)[Documentation](#)[YouTube](#)[Demo Passes](#)

Smartix Scanner

Shows whether this template is intended for use with our Scan App. It also indicates that a pass is compatible with Shopify, although with Shopify only Scan compatible loyalty, stamp card and membership discount passes are compatible.

Issued

Shows the total number of LIVE issued passes including and that have expired or have been deleted. TEST passes are not counted.

Current

Shows the number of live passes. This includes expired, but not deleted passes. TEST passes are not counted

Expired

Shows the number of expired (but not deleted) LIVE passes.

Installed (Apple & Google)

Shows the number of LIVE passes that are currently installed on Apple and/or Google devices.

Test Passes

Shows the number of TEST passes that you have created. Includes current, expired and deleted passes.

Created

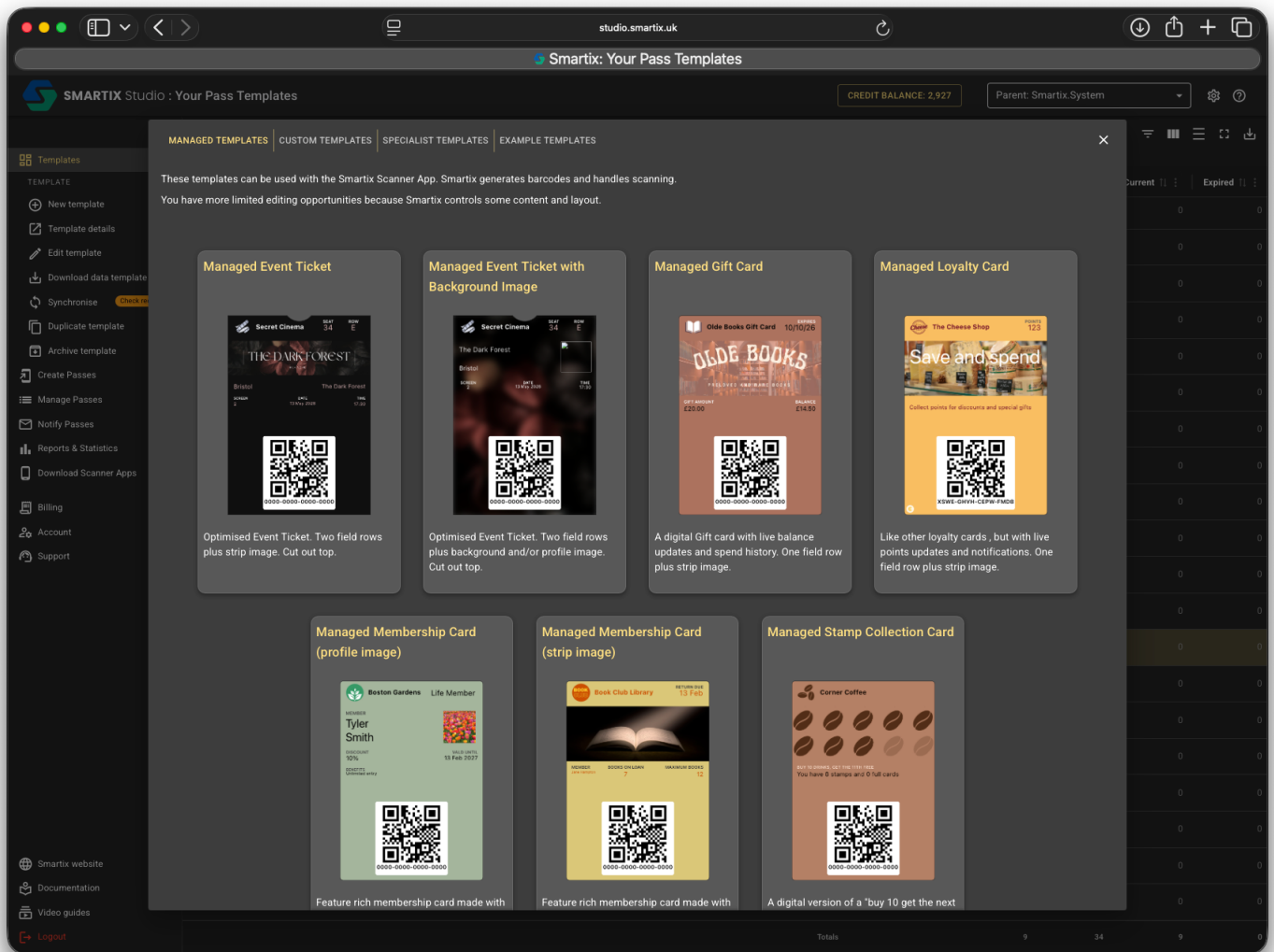
Date and time this template was created

Last Modified

Date and time this template was last modified.



Whilst you may find that editing one of the sample templates we created for you meet your needs (once you have customised them), but chances are you will want to create other pass types. Select [New Template](#) from the menu to bring up the template selection.



Across the top you will find a choice of [Managed Templates](#), [Custom Templates](#) and [Example Templates](#). If Smartix is providing you with a specialised pass then you will also see [Specialist Templates](#) in the menu.

[Managed Templates](#)

Managed templates are ones where Smartix controls the barcode content. This enables Smartix Scan to be used to scan and interact with passes such as loyalty cards, stamp cards, event tickets, membership cards etc.

Smartix Scan is a mobile app for iOS and Android that allows you to add/redeem loyalty points and stamp card stamp, verify membership and event entry.

These templates are also compatible with the Smartix's [Shopify plugin](#) for StoreFront and POS terminals. This plugin enables you to seamlessly integrate loyalty cards, stamp cards and membership discount cards into your Shopify online store and/or your physical store using Shopify POS app.

Managed loyalty and stamp cards are also compatible with our self-signup system. We provide QR code that you can display in your store. Customers scan the QR code in order to generate their own card to join your loyalty scheme automatically.



Custom Templates

With custom templates you also control the barcode (or omit the barcode if you prefer) and you provide your own scanning system. Passes generated from these templates are not compatible with [Smartix Scan](#) or our [Shopify app](#), but they are compatible with our [Zapier plugin](#).

Choose custom templates if you do not require a barcode / scan capability, or you have your own scanning system.

Example Templates

These are a few examples of templates we have created using our base Managed and Custom templates. Use them for inspiration, or take a copy and use them as the basis for your pass.

Specialist Templates

Upon request, Smartix can supply more complex templates where Smartix provide additional functionality or content layout. For example, we already have accredited UK rail ticket templates for approved ticket retailers. These automatically generate itineraries and detailed customer information.

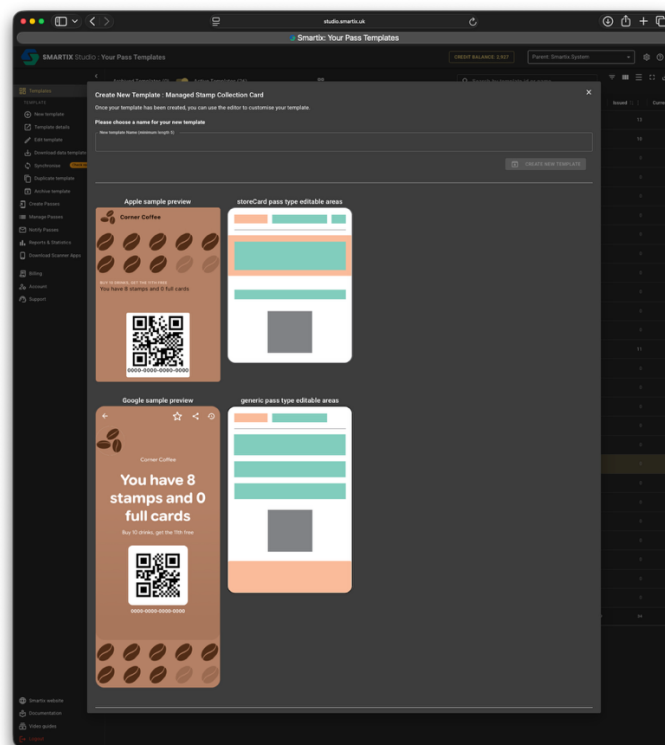
If you have a use-case for something other than our standard [Managed](#) and [Custom](#) passes then get in touch and we will see what we can do to help.

Choose a base template

Click on a template to bring up more details. This shows a preview of the Apple and Google passes and indicates the number of editable regions. Pay attention to the Apple templates. Whilst most Google templates are very flexible, Apple's are more limited. There is a trade-off between the shape of the pass, the number of editable regions and which images you can use with Apple.

Sometimes it can be better to ignore the pass Apple intended for your use-case in favour of an alternative template which gives you more flexibility. Unsure which to choose? Drop us a line. We are happy to advise.

If you are happy, provide a name for your template and click [create new template](#) button. Smartix will create a duplicate of our base template and place it into your passes list. You'll be taken straight to the editor to begin customising your template.



[Website](#)

[Smartix Studio](#)

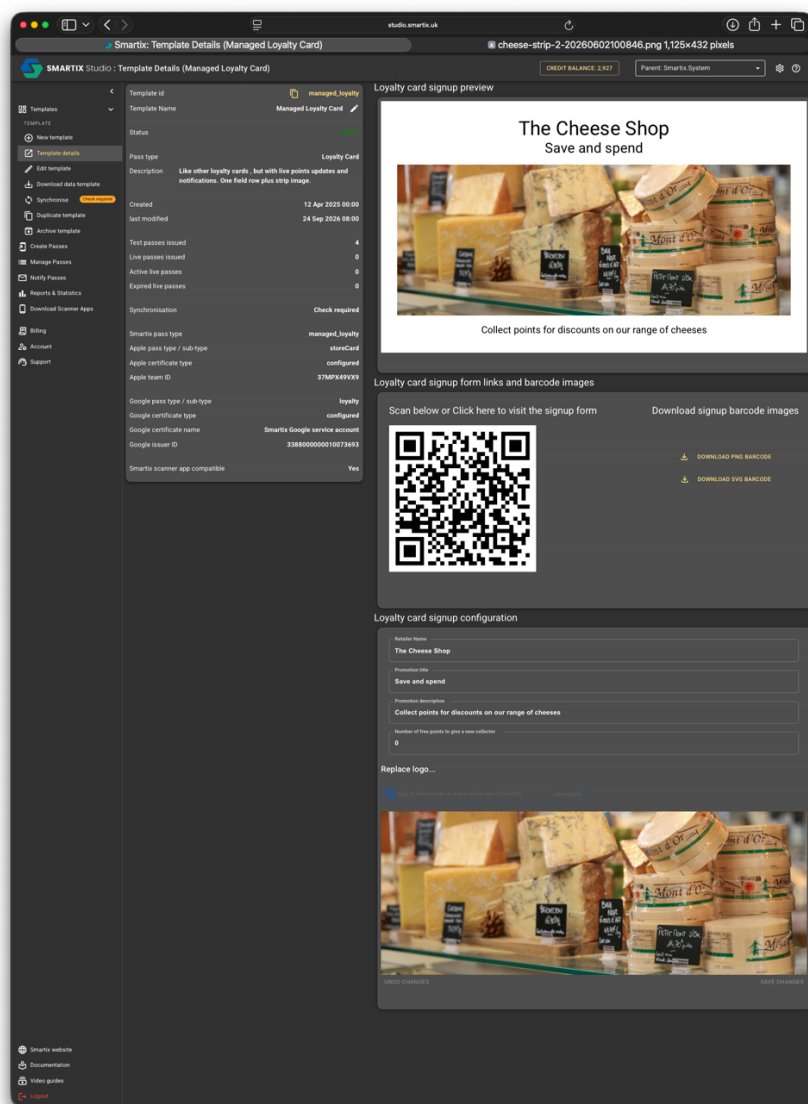
[Documentation](#)

[YouTube](#)

[Demo Passes](#)

Template Details

Here you can see a range of information about your template. You can also edit your template name here.



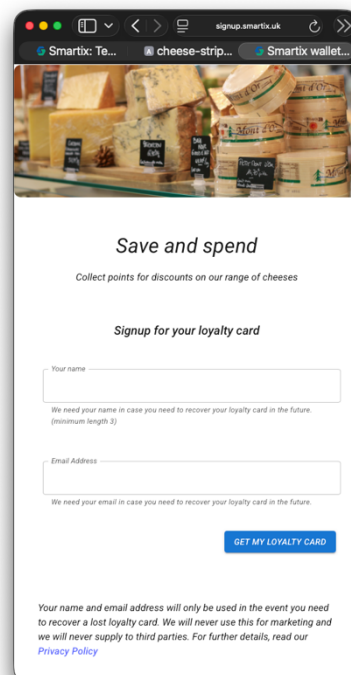
Managed Loyalty / Stamp Card

Managed loyalty and stamp cards have a self-signup system so your customers can just scan a QR code to create and install a pass for themselves.

You configure the information we display on the self-signup form here. Set your title, image etc.

You can also download the self-signup QR code here. We provide it in PNG and SVG format. Grab the SVG one for professional printing / laser cutting etc.

Scan the QR code with your mobile to view your signup form.



[Website](#)

[Smartix Studio](#)

[Documentation](#)

[YouTube](#)

[Demo Passes](#)

Managed Gift

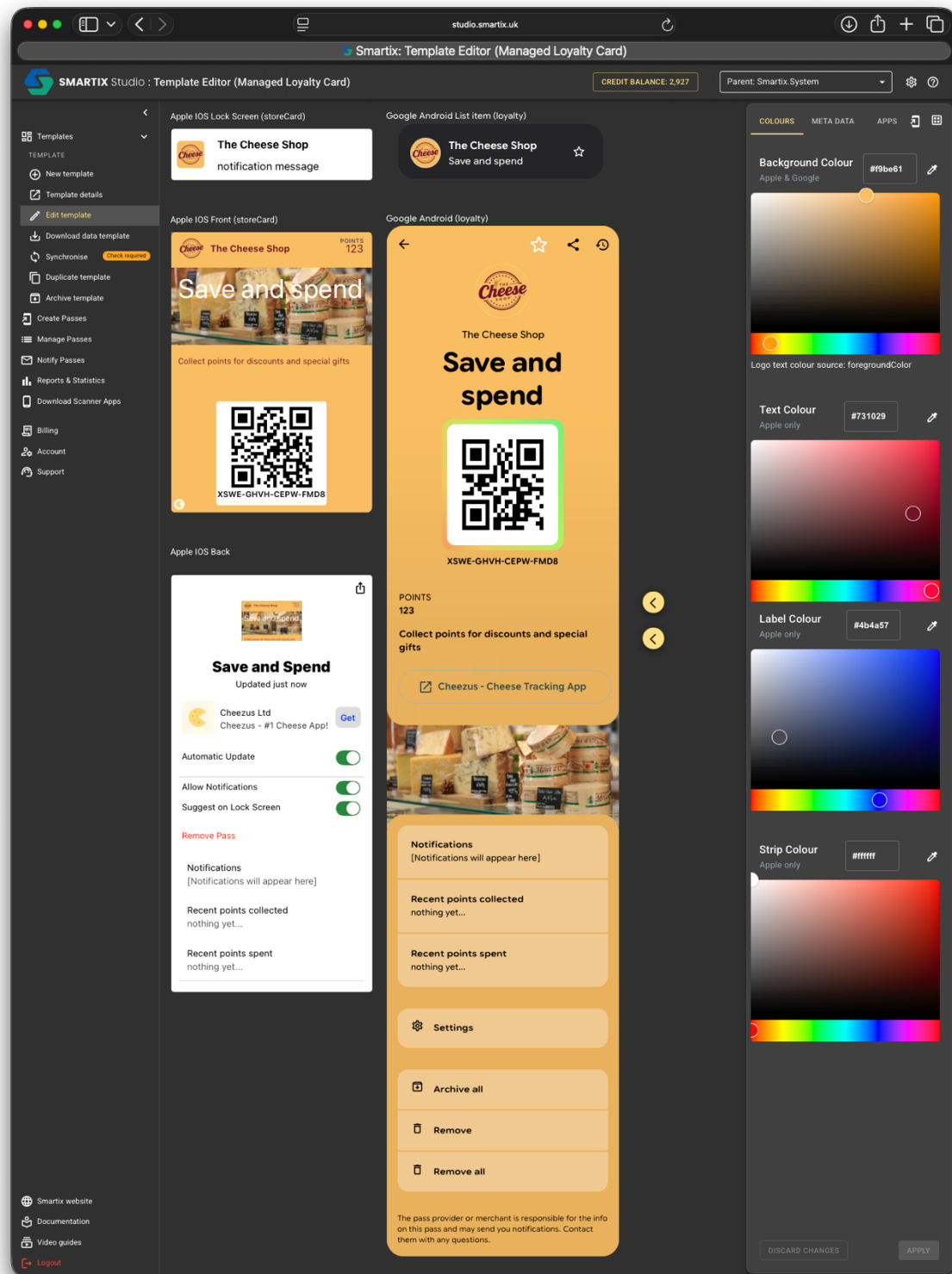
You can upload an image here which will appear in Smartix Scan when you scan one of these gift cards.

Edit Template

Our template editor is a WYSIWYG editor for both Apple and Google passes. You can choose to see Google templates in both the new format or the legacy format that users with older devices / versions of the wallet app will see (Change this in your Settings).

Our rendition of passes of both devices is extremely accurate and can be relied upon to give you an accurate representation of what your passes will look like when installed on devices. That said, both Apple and Google have some quirks, so do create some test passes to verify before rolling out live passes.





Editor Layout

On the left you see the Apple template editor. Starting at the top we have a representation of what a lock-screen notification will look like. Below that we have the main (front) part of the pass and below that the details section (back of pass).

Then we have the Google template editor. With the new Google pass layout, we show what a list item looks like (the theme of this matches your theme preferences). Our example above shows what it would look like on a device with dark mode. Below that we have the pass which is split into main details, hero image (optional) and details.



[Website](#)

[Smartix Studio](#)

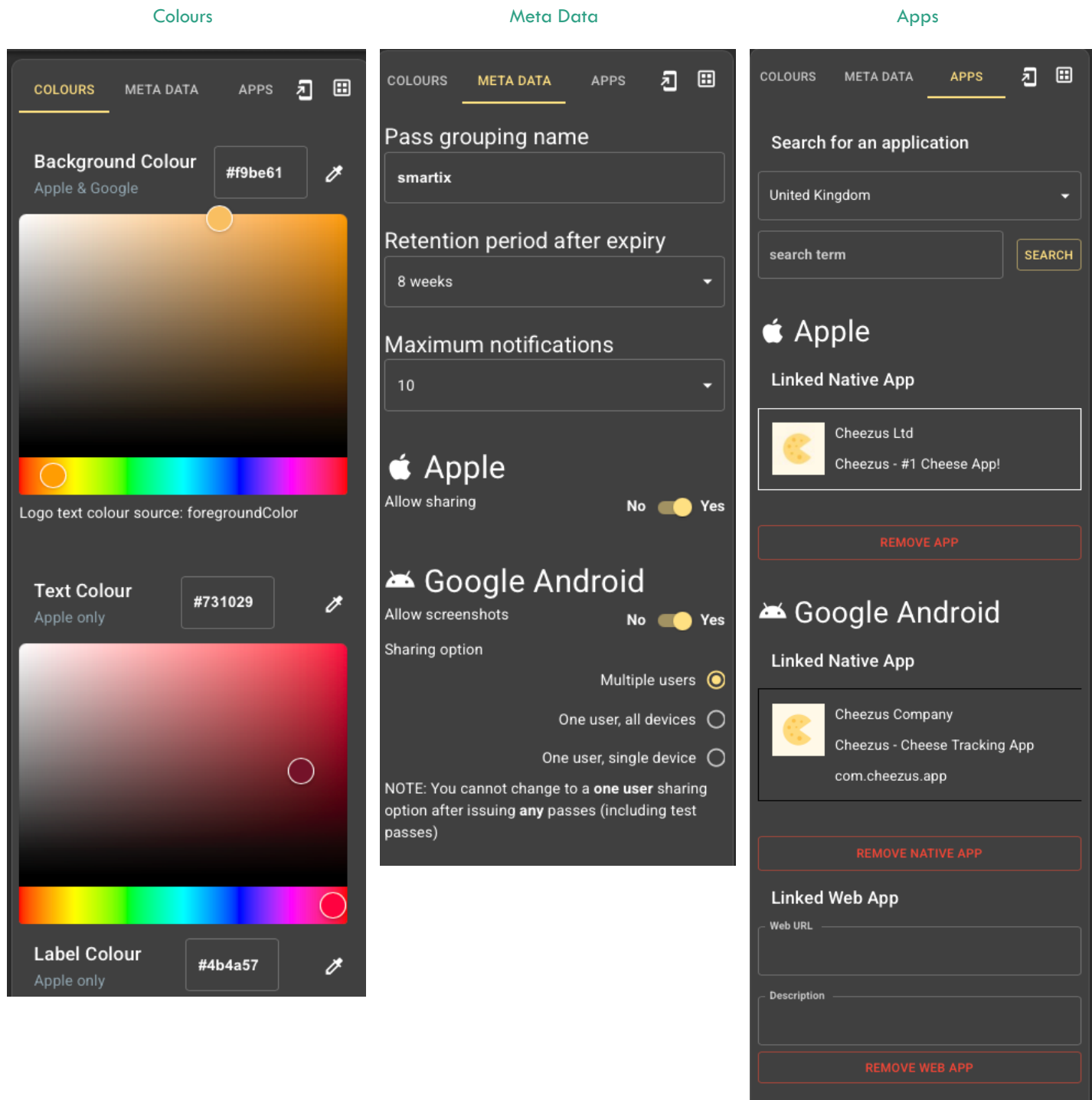
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[YouTube](#)

[Demo Passes](#)

You can change to view the older Google format (which many customers might still see if they have an older version of Android and/or the wallet app. With the older version, the main (front) and pass and details (back of pass) are displayed separately like the Apple layout.

On the right we have the main editor panel. There are three tabs:



Colours

Set the colour for your pass. With Apple you can set the background colour, the main text colour, label colour and if applicable, the colour of text that sits over the strip image. With Google you can only choose the background colour, Google then chooses either black or white for your text colour.



[Website](#)

[Smartix Studio](#)

[Documentation](#)

[YouTube](#)

[Demo Passes](#)

There are a few quirks... Apple will usually use your text colour for the text next to the logo. However, if you choose some background colours, it will switch and use your label colour! This behaviour is not documented by Apple, but we have done our best to reverse-engineer their algorithm. In the vast majority of cases what we show is correct. But do verify with a TEST pass if it is important to you. A small tweak to the background colour can switch the logo text colour.

Similarly, Google do not document how they choose the text colour from the background colour. Again, we have reverse-engineered it and believe we are mostly accurate. As always, verify with a TEST pass if it is important to you.

You can use the eye dropper to pick a colour from an image in your pass.

Use the iOS / Android icons to toggle between previewing the new colour on an Apple or Google pass.

Colour can be overridden on a per-pass basis by supplying **colours.background**, **colours.foreground**, **colours.label** and **colours.strip** in your pass data.

Meta Data

Pass grouping name: If your customers will install more than one of your passes, you might like to have them grouped together. You can group passes with the same template by entering a group name here (whatever text you like). You can also group text from different templates by using the same value in each of them. If you do not care about grouping passes together you can ignore this.

Retention period after expiry: When you issue passes you can choose whether they have an expiry date or not. If you do set an expiry date then passes will automatically become disabled (barcode deactivated) on Apple devices and for both Apple and Google the pass will be moved to the archive

Expired passes are automatically deleted from Smartix. You can use this setting to determine how long after a pass expires when that deletion will occur. This is useful for example where a membership expires, you might like to keep the pass in the system for many months so it can be activated again if your customer renews their membership. On the other hand, you might like to expire event tickets quite soon after the event.

The reason why this is important is if you send notification or pass updates to “all passes”. “All passes” includes expired passes, so you will use credits for the updates and notifications for these expired passes as well as current actives ones. This can be a good thing; a timely notification or update can bring a customer back to you. Use such notification for renewal reminders, special offers etc.

However, at some point you might no longer wish to use credit on long expired passes. So use this to ensure that you control when Smartix deletes these expired passes.

You can, of course, also delete passes manually at any time.

Maximum notifications: Notifications are displayed on the details (back) section of passes. Latest at the top, older notifications below. If you send many notifications that list could get rather long. Here you can set how many older notifications are displayed. Any in excess of this number are retained in the pass data but are not displayed.

Individual notification can also be deleted from a pass if required.

Apple – allow sharing: This determines whether Apple displays the share icon on your passes. It does not prevent someone sharing the install link. Apple does not have any provision for preventing pass sharing. If this is important to your use-case, get in touch with us and we can explain options that can be used to limit sharing.

Google – Allow screenshots: Setting this on disabled Google’s screenshot tool when your pass is displayed. It only prevents static screenshot from being shared.

Google – Sharing options: Google passes are linked to a Google user account when installed. You have a few options: Multiple Users – pass can be installed by any number of user accounts; One user, all devices – pass can be installed in only one Google user account, but on all the devices that user owns (or their account it logged into); One user single device – As it says, this can be installed once. Be aware that if a user loses a device, they cannot install the pass onto a replacement so ensure you have support in place if you use this option.



CAUTION: Google will not permit you to swap from Multiple Users to either of the single user options after you have issued any passes (including TEST passes). So, if you want to use one of those options, you must set this before you issue any passes. If you do issue a pass you would need to duplicate the template and delete the current one.

Apps

You can link any native app that you have to your pass. This displays a link for customer to install your app.

Just search for your pass (We search Apple App Store and Google Play Store) and assign it to Apple and Google

Additionally, Google can have a link to a web app. This is not displayed when the pass is on a device but is shown when a user views their google passes in a browser (<https://wallet.google.com/wallet/passes>).

Buttons

You will also see two icon buttons. Next to the tabs. Clicking the phone icon will generate a test pass and present install links. This is a quick and convenient way to verify your pass design on real devices without leaving the editor. The other brings up the dynamic value editor. More about that later...

Editor

To edit content in your pass simple click on it – text or images. When you do this, an edit panel will slide in from the right. What you see depends on what content you click on.

Pass titles and other “fixed” text will bring up a basic panel like this. All content is managed by “variables” or “dynamic values”. These all have default values which are what you see when editing the template. Some are fixed for all passes; some can be overwritten with individual values for each pass.

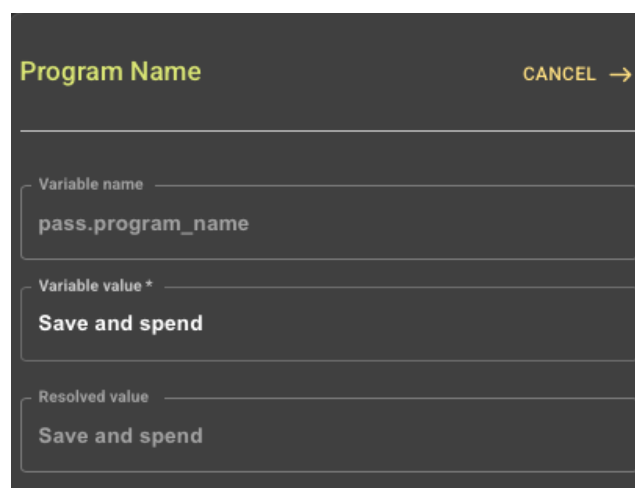
The variable name is the value you would need to provide to overwrite this for a pass. If you do not provide a pass specific value the template default is used.

You can change the default by changing the variable value.

You can also reference other variables by making a note of their name then entering then in the variable value inside `{{}}`.

For example “You have `{{loyalty.points.balance}}` loyalty points” will display “you have 123 loyalty points”. (assuming the customer has 123 points of course!).

The resolved value shows the value after these variable names have been replaced with values.



The screenshot shows a dark-themed edit panel titled "Program Name" with a "CANCEL" button and a right arrow. It contains three input fields: "Variable name" with the value "pass.program_name", "Variable value *" with the value "Save and spend", and "Resolved value" with the value "Save and spend".



Other text might bring up this panel. This is a field panel where you have a varied number of items. You can add more (up to the limit, usually 4 on Apple and 3 on Google) and reorder items.

For main/front of pass fields, there is a little indicator so you can see where the item will be displayed.

Click the panel to bring up the detail for a single item...

The image shows two panels from the Smartix Studio interface. The top panel is for configuring a 'label' and the bottom panel is for configuring a 'value'. Both panels have a 'Fixed text' or 'Use a variable' option. The 'label' panel shows a 'label' field with the text 'DATE'. The 'value' panel shows a 'Dynamic value name' dropdown set to 'event.datetime', a 'value' field showing '2026-05-13T17:30:00Z', a 'Resolved value' field showing '2026-05-13T17:30:00Z', and a 'formatted value' field showing '13 May 2026'. Below these are 'Read Only' options for both label and value, 'Alignment' options (left, middle, right), 'Formatting' options (None (Text), Number, Date, Time, Date and Time, Money), 'Date format' options (None (hide date), Short (DD/MM/YY), Medium (DD MMM YYYY), Long (DD MMMM YYYY), Full (dddd DD MMMM YYYY)), 'Date/time options' (Ignore time zone, Adjust to user's time zone, Display as absolute date, Display as relative date), and a 'Change Message' field. A note at the bottom states: 'NOTE: Must contain %@. This will be substituted with the new value. eg. "Date changed to @" will appear as "Date changed to 12 May 2026" if the new value is "12 May 2026" Apple will display a generic change message if you do not include %@.'

The image shows the 'auxiliary Fields' panel in Smartix Studio. It has a title bar with a plus icon, the text 'auxiliary Fields', and a 'CANCEL' button with a right arrow. Below the title bar are two fields: 'label colour : model.labelColor' and 'value colour : model.foregroundColor'. There are three rows of configuration options. The first row is for 'SCREEN' with a value of '2'. The second row is for 'DATE' with a value of '13 May 2026'. The third row is for 'TIME' with a value of '17:30'. Each row has a red square icon, a plus icon, a minus icon, and a settings gear icon.

Fixed text/variable: If you want the same text (usual for labels) on every pass, then use Fixed Text. If you want to be able to set different values for each pass the chose “Use a variable”. Select from existing variables, or create a new one (We will cover this in variable / dynamic values manager later on).

Alignment (Apple only): Choose how text aligns. This aligns text within the items slot (left, middle, right) it does not change their slot.

***TIP:** Since items always go into the left slot (unless you have only 1 row of items in the new Google format in which case it goes into the middle). Add a second and it goes to the right. Add another and you can have left, middle (2 middles for Apple) and right.*

If you want a single item in the right-hand column, just add two and use spaces for the left hand one. It'll take up space, pushing your item to the right, but will not be visible.

Formatting: Choose how your content will be formatted. If you know about Google wallet passes you might know that this formatting is not supported by Google. Smartix applies the formatting itself and send the formatted value to Google. This ensure you can have the same look on both Apple and Google.

Change message: Again, if you happen to know about wallet passes, you’ll recognise this as an Apple only option. However, Smartix uses Google notifications to provide a similar message when pass values change.

You can add whatever text you like, but you must include %@ somewhere (You can use just %@ and no other text if you wish). If you do not, Apple will ignore your change message and updates will be silent. %@ is replaced with the new value.

For example, you might have an item which displays an event time. You could set a change



[Website](#)

[Smartix Studio](#)

[Documentation](#)

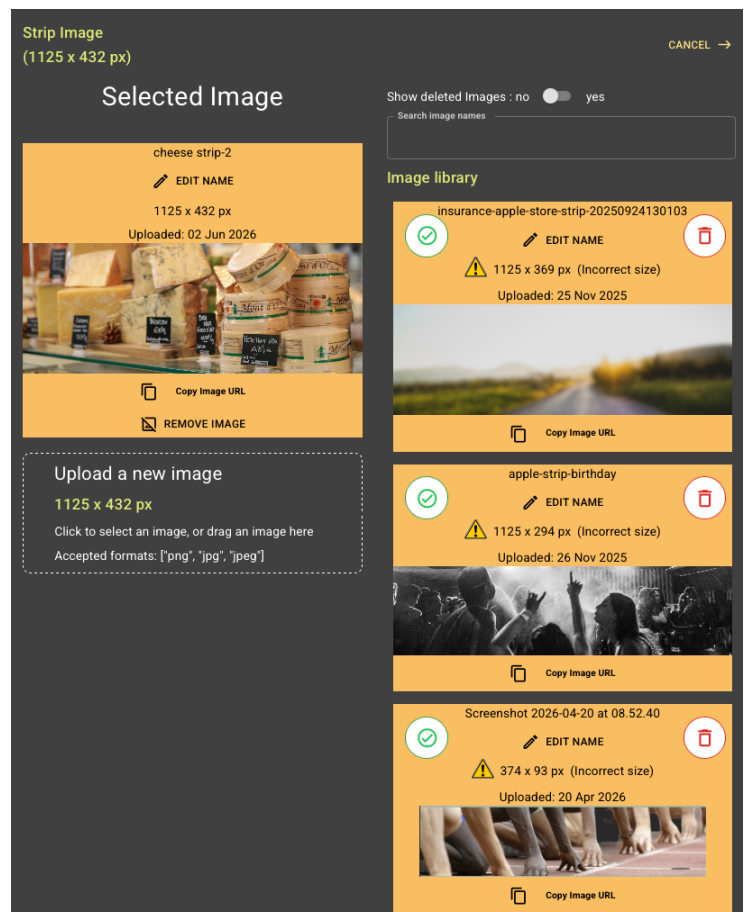
[YouTube](#)

[Demo Passes](#)

message to “UPDATE: Event time changed to %@”. Then if you do update the event time, the user will see a notification “UPDATE: Event time changed to 18:45”.

Images will bring up the image selector. Select from your existing images or upload a new one. Note that the ideal size for an image is shown top left.

Remember to name your images when you upload them. This will enable you to search for images when you want to reuse them later.



Managed stamp cards: If you are editing a stamp card template then you will have to upload one image for each stamp state. So, if your stamp card requires 10 stamps then you need to upload 11 (0 – 10 stamps); if your stamp card has 6 stamps then you need to upload 7.

You'll see a panel like this first. Click each one in turn to open the above editor to select your image for each stamp state.

Smartix then takes care of displaying the correct image depending on the number of stamps your customer has.



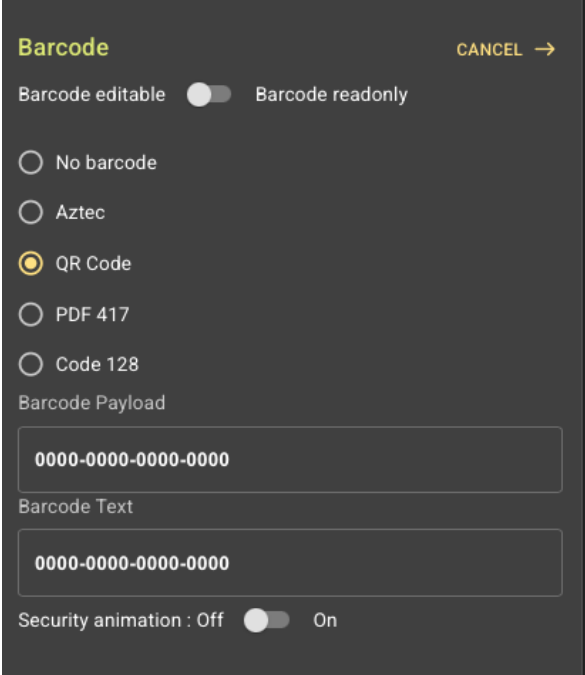
Barcodes will bring up the barcode editor.

Choose the type of barcode you need. We have limited the list to the barcodes that both Apple and Google support.

If you are editing a managed template, then you will not be able to edit the barcode.

To provide barcode data when you create passes, you provide the data in **barcode.payload** and **barcode.text**

Barcode.text is displayed below the barcode.

A screenshot of the 'Barcode' editor interface. It has a dark background. At the top left is the title 'Barcode' in yellow, and at the top right is a 'CANCEL' button with a right arrow. Below the title, there are two toggle switches: 'Barcode editable' (which is turned off) and 'Barcode readonly' (which is turned on). Underneath are five radio button options: 'No barcode', 'Aztec', 'QR Code' (which is selected), 'PDF 417', and 'Code 128'. Below these is a section labeled 'Barcode Payload' with a text input field containing '0000-0000-0000-0000'. Below that is a section labeled 'Barcode Text' with another text input field containing '0000-0000-0000-0000'. At the bottom, there is a 'Security animation' toggle switch, currently set to 'Off'.

Pass details / back of pass: have the same field editor as the front fields. However, the [latest] notification field cannot be removed (Smartix needs this to display notifications). Older notification field can be removed if you wish. You can also add any other fields that you require and position the notification where you wish.

Google main/front pass fields: Google passes can have up to three rows of fields. Click the chevron icon to the right of the pass to add or remove and reorder rows.

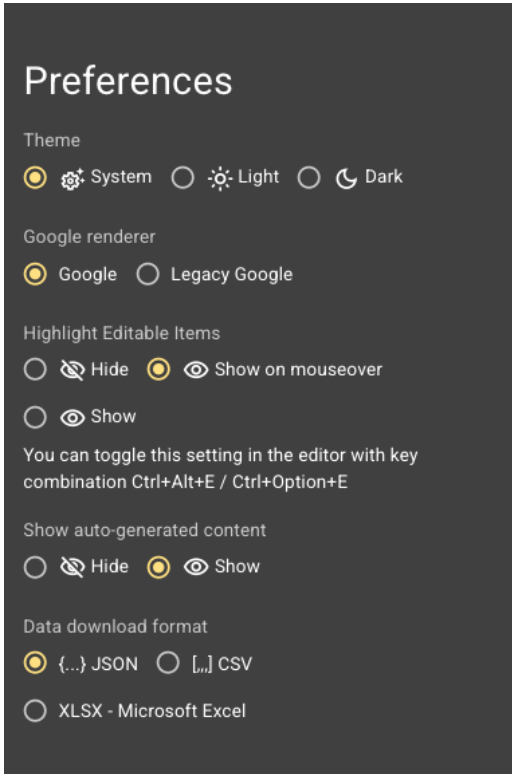
Editor settings

Click the setting icon (top right of the page) to open the setting drawer.

Here you can change the **theme** (dark or light mode), whether you want to see google templates/passes in the new **google format** or the old legacy format (Useful during the transition whilst some users with newer version of Android/wallet app will see the new format, but other user may still see the older format).

You can choose to hide or show indicators around editable fields on the passes. Hide for the best representation of the pass, show for easy editing, or show on mouse-over to show when you move your mouse near to one.

Apple and Google both add additional (non-editable) items to your passes, such as options for the user to manage their pass. You can choose whether to show these (most accurate preview) or hide them if you wish to focus only on the content you can edit.

A screenshot of the 'Preferences' drawer. It has a dark background and a title 'Preferences' at the top. Below the title are several settings sections. The 'Theme' section has three radio buttons: 'System' (selected), 'Light', and 'Dark'. The 'Google renderer' section has two radio buttons: 'Google' (selected) and 'Legacy Google'. The 'Highlight Editable Items' section has two radio buttons: 'Hide' and 'Show on mouseover' (selected). Below this is a text note: 'You can toggle this setting in the editor with key combination Ctrl+Alt+E / Ctrl+Option+E'. The 'Show auto-generated content' section has two radio buttons: 'Hide' and 'Show' (selected). The 'Data download format' section has three radio buttons: '{...} JSON' (selected), '[...] CSV', and 'XLSX - Microsoft Excel'.

[Website](#)

[Smartix Studio](#)

[Documentation](#)

[YouTube](#)

[Demo Passes](#)

Some text content on you passes can be fixed to the template so every user sees that exact same value. Other text, images, colours etc can be different for each pass.

Example might be, show an expired membership with a grey background instead of the usual colour; or show images representing different levels in a theatre depending upon where the customer will be sitting. There are endless possibilities for customising passes.

For any content that might be changes you must have a variable (or dynamic value – same thing, different names). By using a variable such as `{{customer.name}}` instead of just “Fred Bloggs”, or `{{event.date}}` instead of “14-06-2028” means you have the option to change these even after you have issued the pass and your customer has installed it.

`{{customer.name}}` can be used to supply a different name for each pass. Whereas `{{event.date}}` would probably not be used that way, it could still be used to update **all passes** in the event you have to change the date of your event. Combined with a notification to explain why the event date was changed; it becomes a great way to ensure the pass still shows the correct event details even after the change.

You could use a variable for almost anything – membership tier, so you can update it if user upgrades their membership, latest news, personalised links, current loyalty points, insurance policy details...

Manage Dynamic Values

Use pre-defined dynamic values where possible. Create custom dynamic values where needed.

You can use other dynamic value names in value to build complex results
eg. "You have `{{loyalty.points.balance}}` loyalty points"

ADD ITEM DOWNLOAD

Value name	Encrypted	Read only	Pass data	Value	Action
barcode.format			☐	QR_CODE	Required
barcode.payload			☒	A very long string used to generate a se	IN USE
barcode.text			☒	<code>{{pass.pass_id}}</code>	IN USE
				#ffca85	
colours.background			☐	 #432d09	Required

CANCEL SAVE

Value Name: The data value name. Use this name to provide a data value for this variable. You can use the dot notations shown in the table (eg. "barcode.text": "my value") or you can use nested JSON such as:

```
"barcode": {  
  "payload": "my barcode payload",  
  "text": "my value"  
}
```

Encrypted: Indicates whether this variable is stored encrypted or not. Non-encrypted values can be searched and filtered on. eg. you could ask to send a notification to all passes that have between 100 and 200 loyalty points. Encrypted values cannot be searched, but are held in a secured format.

Read only: Indicates that a value is provided by Smartix and cannot be overwritten. eg. Loyalty point balance for a managed loyalty card.

Pass data: You set this to indicate which variables you wish to be supplied on a per-pass basis and which are to be used for the template only. eg. You might have an insurance policy number variable that needs to have a different value for each policy/pass. Whereas a variable holding contact details for the company would be the same for all passes.

Value: A default value for this variable. This is the value that will be used in the editor to provide you with the pass preview. It is also the value that will be used when passes are created unless overwritten in the pass data.

Action: If a variable can be deleted (must not be in use) then you will have a button here to do so. It's best to remove unused variables so your template is easier to manage.



Add a variable

You can add more variables to your template by using “add Item”. You can choose from the library of built-in variables, or you can create a custom variable that is unique to your template

The screenshot shows the 'Manage Dynamic Values' interface. At the top, there's a header 'Manage Dynamic Values' and a sub-header 'Use pre-defined dynamic values where possible. Create custom dynamic values where needed.' Below this, a note says 'You can use other dynamic value names in value to build complex results eg. "You have {{loyalty.points.balance}} loyalty points"'. There are 'ADD ITEM' and 'DOWNLOAD' buttons. A table lists variables with columns: Value name, Encrypted, Read only, Pass data, Value, and Action. The table contains three rows: 'barcode.format' (QR CODE, Required), 'barcode.payload' (IN USE), and 'barcode.text' (IN USE). Below the table, there's a section for 'colours.background' with a color picker showing '#432d09'. An 'Add data variable' modal is open, showing a list of variable families: business, images, notifications, pass, person, and custom. The 'business' family is selected.

Value name	Encrypted	Read only	Pass data	Value	Action
barcode.format				QR CODE	Required
barcode.payload					IN USE
barcode.text					IN USE

colours.background

#432d09

CANCEL SAVE

The 'Add data variable' modal form is shown. It has fields for 'Variable family' (set to 'custom'), 'Custom variable name' (set to 'books.loaned'), 'Variable type' (set to 'number'), and 'Default value' (set to '0'). There are toggle switches for 'Encrypt this variable' (off) and 'Allow in pass data' (on). A note at the bottom states: 'Any variable containing personally identifiable data, or "magic links", should be encrypted.' There are 'CANCEL' and 'ADD' buttons.

Variable family: custom

Custom variable name: books.loaned

The variable will be stored under custom.*

Variable type: number

Default value: 0

Encrypt this variable: ☐

Allow in pass data: ☒

Any variable containing personally identifiable data, or "magic links", should be encrypted.

CANCEL ADD

When adding a custom variable, you will need to say what sort of data the variable will hold (so we know how to format it), whether to encrypt it and whether to allow it in pass data or not.



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[Smartix Studio](#)

[Documentation](#)

[YouTube](#)

[Demo Passes](#)

You can also [download](#) the variable list if needed.

Download data template

You can use this option to download a template that can be used to provide pass data for creating passes within Studio or via the API.

You can choose between JSON, CSV or MS Excel format. You can also set your preferred data format in Settings.

If you are creating passes in Studio then you can use any of the three formats.

To create passes simply edit the downloaded file and add as many rows as needed with the individual pass data.

If you will be creating passes via the API then you must choose the JSON format and remove the outer square brackets. With the API you create passes individually, but you can send multiple requests in parallel.



Synchronise

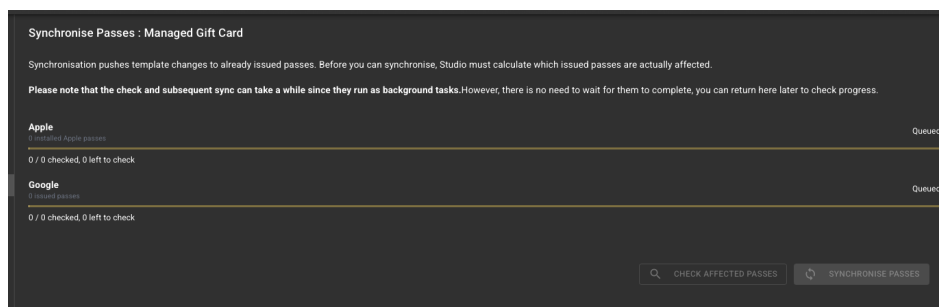
If you change the design of your pass template after you have issued passes then those changes are generally not seen in those issued passes. Some Google changes will be, but most will not.

It is your choice whether you wish to synchronise those changes to the issued passes or not. You may prefer them to pick up the changes organically when some other specific change is made to the pass. Or you may simply have more changes to make and wish to delay the update until all changes are complete. There is a credit cost to update passes, so plan your updates accordingly.

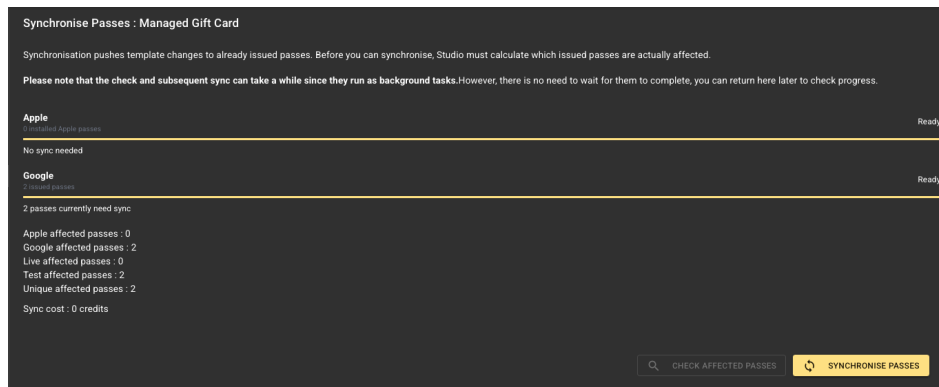
If there is a badge next to the Synchronise menu item then it will indicate that changes have been made since passes were issued, or if you have already done a check, that some passes needed to be synchronised.

Click the [check affected passes](#) button to initiate a check. The check is run as a background task and may take quite a while to run if you have many issued passes. You do not need to wait for the result; you can return later. The badge is also present in the template list, so you can see there when the check is completed.

This shows a sync in progress:



And a sync has completed with some passes requiring a sync:



You can see how many passes require synchronisation and the credit cost to do so.

Click the synchronise passes button to initiate the sync. Again, this runs as a background task and may take some time to complete.



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[Documentation](#)

[YouTube](#)

[Demo Passes](#)

Duplicate Template

As well as adding new templates from the Smartix library, you can copy one of your existing templates to use as a base.

Archive Template

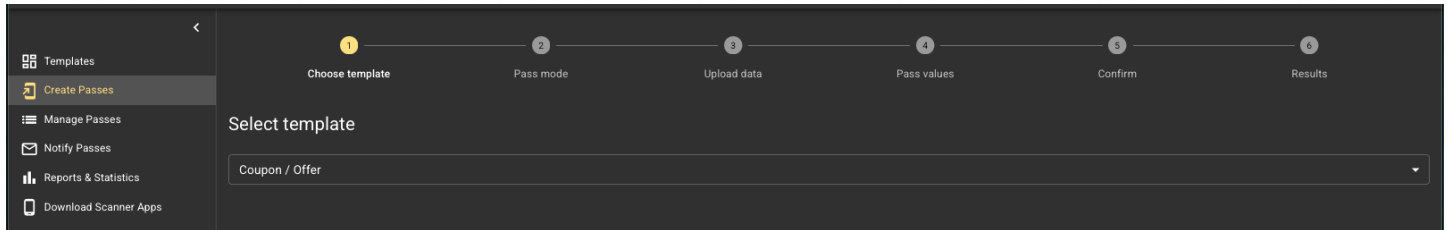
If you no longer require a template or will not be issuing new passes then you can archive a template. This moves it out of your current template list. However, you can still access archived templates and restore them at a later date. If you definitely do not need a template, then once archived you have the option to delete it.



Create Passes

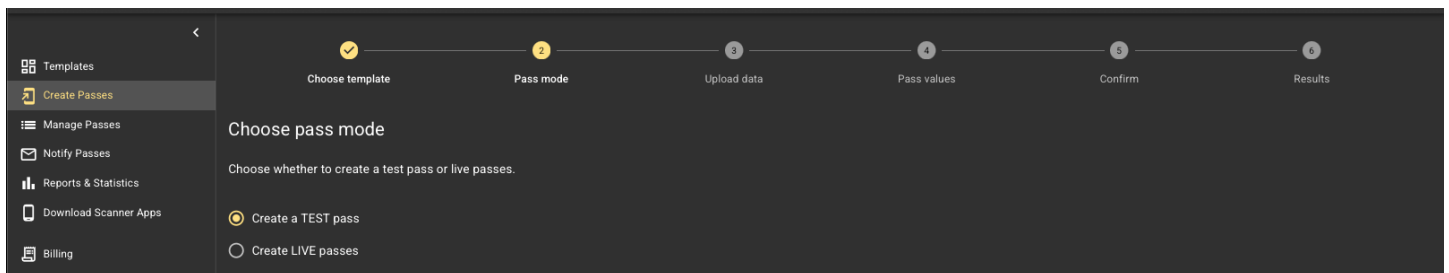
You can create both TEST and LIVE passes from within studio.

After clicking create passes menu item, select the template you wish to create passes for (it'll always default to the last template you were working with).

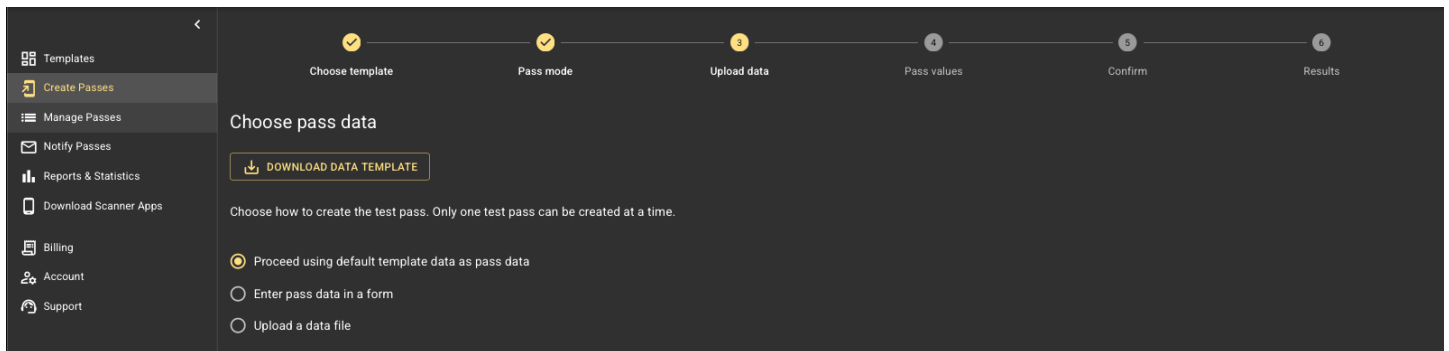


Click next and choose whether to create a LIVE or TEST pass.

Creating LIVE passes uses credits; TEST passes are free to create but expire after 48 hours.



Choose how to provide the pass data. If you are creating a TEST pass you can just use the template defaults, or you can supply your own data. If you are creating a LIVE pass then you must supply data.



If you are creating a single pass you can use the form to provide the data:



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[Smartix Studio](#)

[Documentation](#)

[YouTube](#)

[Demo Passes](#)

Templates

Create Passes

Manage Passes

Notify Passes

Reports & Statistics

Download Scanner Apps

Billing

Account

Support

Choose template

Pass mode

Upload data

Pass values

Confirm

Results

Choose pass values

Only pass variables can be overridden.

barcode.payload

A very long string used to generate a seemingly valid looking barcode without having any real payload data {{pass.pass_id}}

Matches template default (will not be overridden).

barcode.text

{{pass.pass_id}}

Matches template default (will not be overridden).

If you are creating multiple passes (LIVE only. You can only create a single TEST pass at a time), you must upload a data file. This is NOT the file you may have downloaded from the variable editor since this will contain both pass and template variables). You can use the [download data template](#) button to download a template for your data.

Templates

Create Passes

Manage Passes

Notify Passes

Reports & Statistics

Download Scanner Apps

Billing

Account

Support

Choose template

Pass mode

Upload data

Pass values

Confirm

Results

Choose pass data

DOWNLOAD DATA TEMPLATE

Choose how to create the test pass. Only one test pass can be created at a time.

Proceed using default template data as pass data

Enter pass data in a form

Upload a data file

The first row will be used to create one test pass.

Upload data file

Click to choose a file, or drag one here (json, csv, xlsx)

Confirm your selection. If you are creating live passes, you will see the credit cost for creating those passes.

Templates

Create Passes

Manage Passes

Notify Passes

Reports & Statistics

Download Scanner Apps

Billing

Account

Support

Choose template

Pass mode

Upload data

Pass values

Confirm

Results

Confirm pass creation

Review the request before creating the pass.

Template: Coupon / Offer

Mode: LIVE

Passes to create: 1

This action will use 10 credits. 2,927 credits are available.

When your passes have been created you'll see a table with the results.

Choose template

Pass mode

Upload data

Pass values

Confirm

Results

Total: 1 Processed: 1 Left: 0 Failed: 0

Recipient Name	Recipient Email	Pass ID	Status	Install URL	Apple Install URL	Google Android Install URL	View
		BTVP-82PW-VLN4-HB3C	Created	https://api.smartix.uk/i/PjJJ88...	https://api.smartix.uk/pkpass/e...	https://pay.google.com/gp/v/sa...	VIEW

You be given the pass_id for each pass along with install URLs. As well as the main install URL (which give the user the option to install both Apple and Google versions), you will also see separate Apple and Google install URLs. Use these if you wish to provide direct links from an email etc.



Clicking VIEW will bring up an install window:



You can directly add a pass with the button, or scan the barcodes from a mobile.

The copy email content buttons enable you to copy a formatted snippet that can be pasted into an email client to provide the same options.

Manage passes

Manage passes allow you to interact with the passes you have already created. The table will list your passes. You can toggle between viewing LIVE and TEST passes.

Car Insurance Policy Example (Protect-a-car) Test Passes Live Passes REFRESH DATA									
☐	Pass ID	Install URL	Created	Status	Expiry Date	Install Status	Updates, syncs and notifications today	Free engagements left	barcode / text
☐	HZYN-8AQ8-L9SL-KEGW	https://api.smartix.uk/i/nu0bBV2BPYkHsf3	10 Sep 2026 17:53	active	-	never used	0	5	scan to exchange details
☐	L2VA-LPJS-999Z-CHP8	https://api.smartix.uk/i/qgveT1ohrLOI7hj5	10 Sep 2026 17:53	active	-	never used	0	5	scan to exchange details
☐	Q24W-F7RE-TCS9-6YGG	https://api.smartix.uk/i/MGoIGJHRWMTomig	10 Sep 2026 17:17	active	-	never used	0	5	scan to exchange details
☐	Q8H7-NFHS-M99K-44QA	https://api.smartix.uk/i/hl8PrTDfuzkWN0Jk	10 Sep 2026 17:17	active	-	never used	0	5	scan to exchange details
☐	XYYE-7AX7-2WGY-HJQW	https://api.smartix.uk/i/TUQJOTMoVf62ENoZ	10 Sep 2026 17:16	active	-	never used	0	5	scan to exchange details
☐	43KY-BZBF-SNK8-WB4P	https://api.smartix.uk/i/cjA4KJLYb9RnzSJl	10 Sep 2026 17:14	active	-	never used	0	5	scan to exchange details

You can select a single pass or multiple passes. Use the checkboxes to select multiple. Click a pass row to select a single. Multi-selected passes are highlighted in grey, singles with a green (light theme) or gold (dark theme) colour.

Selecting a single pass enables the [view pass details](#), [edit pass](#), and [install pass](#) buttons (and [pass actions](#) and [scan history](#) for managed template). Selecting multiple enables the [edit selected passes](#), [delete selected passes](#) buttons.

View pass details

This shows all relevant data for a given pass including a visual preview.

You can add / change or remove the expiry date for a pass here.

Pass id

L2VA-LPJS-999Z-CHP8

Created

10 Sep 2026 17:53

Last Modified

10 Sep 2026 17:53

Install status

Never used

First installed

-

Last installed

-

Last uninstalled

-

Free engagements remaining

5

Expires

no

Grouping id

Template id

insurance_demo

Template last Modified

24 Sep 2026 07:59

CHANGE EXPIRY DATE

NEVER EXPIRE

EXPIRE IMMEDIATELY

Protect-a-car

POLICY NUMBER M2

Car insurance policy

VEHICLE Toyota Yaris

REGISTRATION FG17 ADF

EXPIRES 13 May 2026

scan to exchange details

Car Insurance

Protect-a-car

Car insurance policy

scan to exchange details

POLICY M2

REGISTRATION FG17 ADF

VEHICLE Toyota Yaris

Ends

starts



[Website](#)

[Smartix Studio](#)

[Documentation](#)

[YouTube](#)

[Demo Passes](#)

Edit pass

This enables you to edit the data for a pass. You can see the default values for each variable as well as any pass override value. To override a variable where the current value comes from the template default, simply toggle the switch and enter the required value.

Unlike editing a template, any changes you make to an individual pass are automatically synchronised. So the new values are pushed to any devices that pass is install on.

Templates Create Passes Manage Passes VIEW PASS DETAILS EDIT PASS PASS ACTIONS SCAN HISTORY INSTALL PASS EDIT SELECTED PASSES DELETE SELECTED PASSES Notify Passes	Template values are shown for reference. Enable a checkbox to override a variable for this pass.			
	Variable	Template value	Pass override	Pass value
	custom.loyalty_tag_line	Collect points for discounts on future orders	☐	Override disabled
	custom.new_products	New home fragrances.<a href="http://localhost	☐	Override disabled
	custom.next_market	Clevedon Community Hall10am to 2pm on 25 M	☐	Override disabled
	custom.offers	Coming soon...	☐	Override disabled

Pass Actions

This is only applicable to managed gift cards, loyalty cards and stamp cards.

Loyalty cards – you can add or redeem points

Stamp cards – you can add stamps or redeem full cards

Gift cards – you can redeem or refund

Scan history

This table displays a list of interaction with Smartix Scan and/or Shopify app.

You can see when managed passes have been scanned and what action took place.

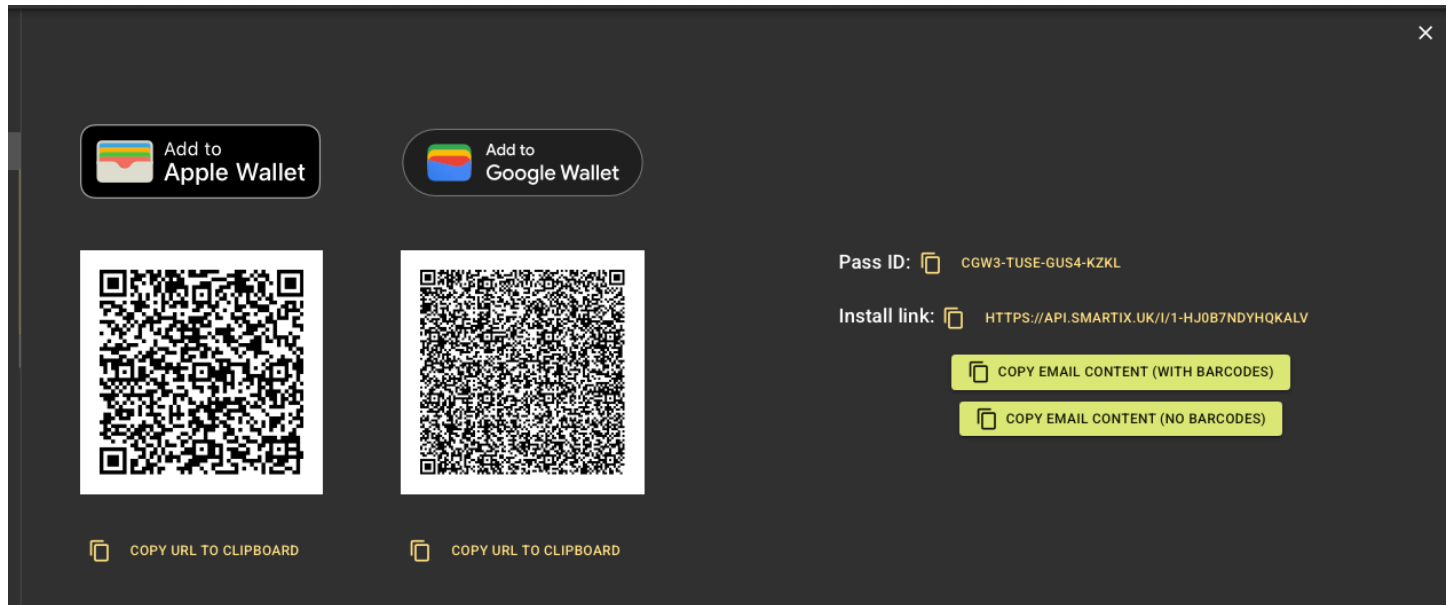
Scanned	Admin Adjustment	Action	Stamps	Cards
03 Sep 2026 11:30		collect		1
03 Sep 2026 11:26		collect		1
03 Sep 2026 11:20		redeem		
03 Sep 2026 11:19		redeem		
02 Sep 2026 15:43		redeem		

[Website](#)[Smartix Studio](#)[Documentation](#)[YouTube](#)[Demo Passes](#)

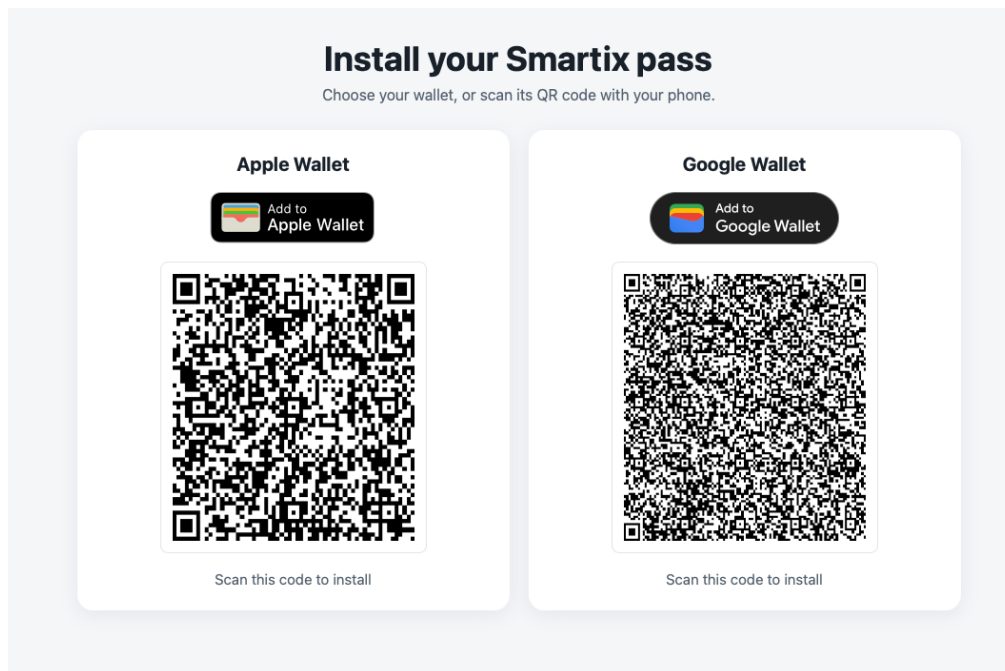
Install pass

Display install links for this pass.

Use the copy email content buttons to copy a formatted version suitable for pasting into an email. You can choose to include or exclude the barcodes.



Apple and Google install URLs can be used to provide separate direct links to install the two pass types. Alternatively use the [shorter] "Install link" which will take the customer to this page:



Edit passes

You can edit more than one pass at a time provided you want to make the same changes to all of them.

The form is the same as editing a single pass, but the new passes will be sent to all of your selected passes.

×

Template values are shown for reference. Enable each variable you want to update across 2 selected passes.

Variable	Template value	Pass usage	Update	New value
pass.validity.end	NULL	Template only – not present in loaded selected passes	☐	Override disabled
pass.validity.start	NULL	Template only – not present in loaded selected passes	☐	Override disabled

Save will update 2 selected passes and trigger platform updates where needed.

UPDATE SELECTED PASSES

Delete passes

You can also delete passes. This action will remove those passes from the Smartix system. You will no longer be able to update or notify these passes. They can no longer be used with Smartix Scan or Shopify or via our API.

However, this does not remove them from any device they are installed on. This is not something that either Apple or Google permit.

You can, of course, send an update to passes to remove barcode or and other data prior to deleting the pass. However, be aware that it may take some time for the update to reach the pass – so allow time for that before you delete. Also, the user may have disabled updates, so this action is not guaranteed.



Notify passes

As well as updating pass content, you can also send a notification to one or more passes.

A notification is a message. How this message is perceived depends upon the platform:

With Apple, the notification appears on the device's lock screen if locked, otherwise it displays an alert. Tapping the alert will take the user to the pass in their wallet. NOTE: Apple does not inform users that a notification is present. It is displayed but no audible alert or vibration is provided.

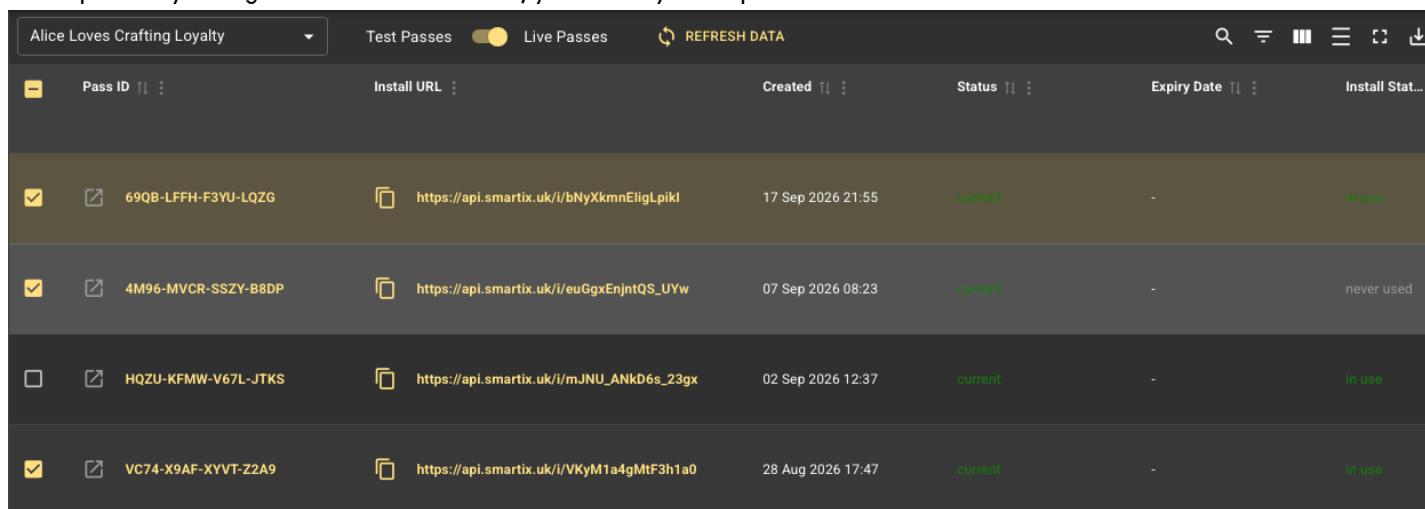
With Google and alert is provided along with a lock screen message. The user needs to tap that to be taken to their pass in wallet to view the notification.

The most recent notification is displayed on the back/details section of the pass. You can optionally also include past notifications (and choose how many to display – see template editor for details).

To send a notification to a single pass, select it and

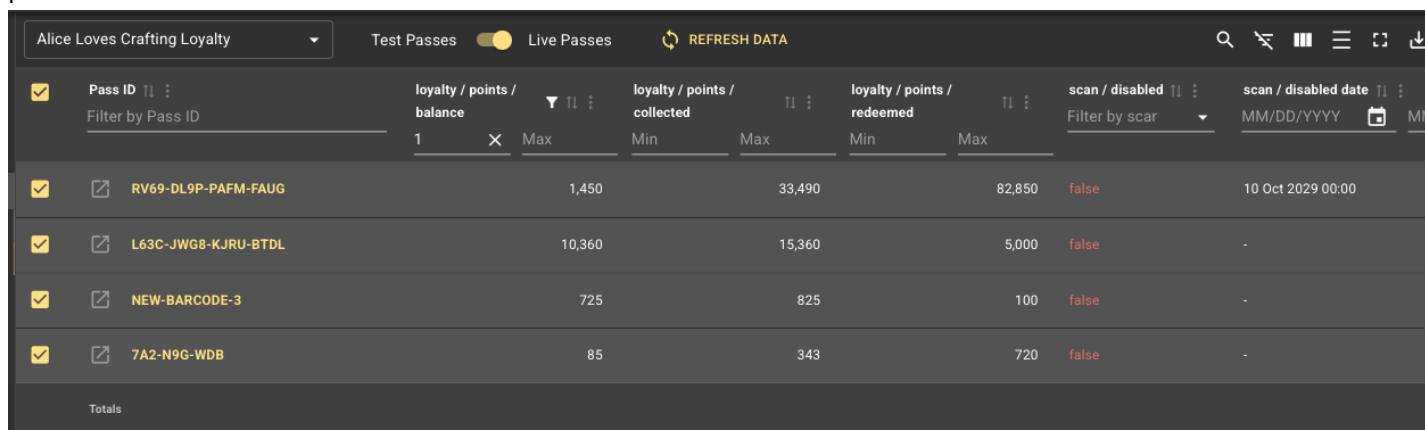
To send a notification to multiple passes you have two options:

- 1) Select passes by ticking the checkbox. Of course, you can only check passes that have been loaded into the table.



Pass ID	Install URL	Created	Status	Expiry Date	Install Stat...
☒ 69QB-LFFH-F3YU-LQZG	https://api.smartix.uk/i/bNyXkmmEligLpikl	17 Sep 2026 21:55	current	-	in use
☒ 4M96-MVCR-SSZY-B8DP	https://api.smartix.uk/i/euGgxEnjntQS_UYw	07 Sep 2026 08:23	current	-	never used
☐ HQZU-KFMW-V67L-JTKS	https://api.smartix.uk/i/mJNU-ANKD6s_23gx	02 Sep 2026 12:37	current	-	in use
☒ VC74-X9AF-XYVT-Z2A9	https://api.smartix.uk/i/VKyM1a4gMtf3h1a0	28 Aug 2026 17:47	current	-	in use

- 2) Apply a filter to the table to select passes matching a criterion, eg. select all passes that have 9 stamps. Then check the “all passes” button.



Pass ID	loyalty / points / balance	loyalty / points / collected	loyalty / points / redeemed	scan / disabled	scan / disabled date
☒ RV69-DL9P-PAFM-FAUG	1,450	33,490	82,850	false	10 Oct 2029 00:00
☒ L63C-JWG8-KJRU-BTDL	10,360	15,360	5,000	false	-
☒ NEW-BARCODE-3	725	825	100	false	-
☒ 7A2-N9G-WDB	85	343	720	false	-
Totals					

In the first case we send the selected pass IDs to the API. In the second case, we send your selection criteria. The API then locates ALL passes that match that criteria.



Notification history

View a list of past notifications sent to a pass.

Templates Create Passes Manage Passes Notify Passes NOTIFICATION HISTORY NOTIFY SELECTED PASSES NOTIFY ALL PASSES	SEND NOTIFICATION		🔍 ⚙️ 📄 📑 🔄 ⬇️
	Created	Message	
	26 Aug 2026 10:35	Testing notify all ZAP	
	24 Jul 2026 16:17	Testing notify stamps 5	

You can also send a new notification to the pass from here.

Notify selected passes / Notify ALL passes

Select one or more passes then enter your notification message.

You can use the filter selection to notify all passes that match a criteria.

We'll calculate and display the credit cost before you confirm.

Notify Selected Passes : Alice Loves Crafting Loyalty

This will send a notification to 1 selected passes.

This action will use 1 credits. 2,917 credits are available.

Notification text

CANCEL

NOTIFY SELECTED PASSES



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[Smartix Studio](#)

[Documentation](#)

[YouTube](#)

[Demo Passes](#)

Reports and statistics

We provide a selection of reports. You can select which template (or all templates) and a timeframe for each report.

Pass Activity

A chart which shows pass issues, updates and notification total.

Adoption

Shows issued passes, active passes, expired along with numbers install on Apple and Google devices.

Template changes

Count of template created and updated over the selected period.

Installs

Shows number of passes installed on devices by platform (Apple and Google)

Scans

Number of scans (Smartix Scan and Shopify) over the selected period

Pass types

Shows the number of templates and issues passes for each pass type

Install report

This generates a downloadable report of the number of passes installed on devices. This can only be run once per hour.

Managed pass data

This generates a downloadable report of the data Smartix manages for your managed passes: loyalty point, history, event entry etc.



Billing

Manage and review your credit use here.

Buy credits

Here you can see when your next free credit top-up is due and how many free credits you will receive.

You can see your current credit balance and purchase a credit bundle.

Free Credits

All customers get a free credit top up each month. These do not roll-over to the following month.

On your billing day, your free credit allowance is reset to 100 credits.

Any unused free credits from the previous month are replaced. Purchased credits are held separately and are not reduced by this reset.

Free credits are always used before purchased credits.

Next topup

01 Oct 2026

Maximum free credits

100 credits

Credit balance

Free Credits Remaining	0
Next Free Credits	01 Oct 2026
Paid Credits Remaining	2,917
Total Available Credits	2,917
Overdraft Limit	200
Total With Overdraft	3,117
Last Purchased Bundle	pro
Purchased	01 Jan 2026
Credits Purchased	25,000
Price	£150
Expires	01 Jan 2027
Auto Top-Up	Disabled
Auto Top-Up Bundle	starter 2,000 credits price £5.00 £4.75
Email Notification Threshold	10% remaining

Purchase a credit bundle

Show prices ex VAT ☒ Inc VAT

Starter overdraft limit: 200 credits	2,000 Credits price : £6.00
Growing overdraft limit: 1,000 credits	10,000 Credits price : £24.00
 Pro overdraft limit: 5,000 credits	50,000 Credits price : £90.00
Business overdraft limit: 10,000 credits	160,000 Credits price : £240.00
High Volume overdraft limit: 20,000 credits	440,000 Credits price : £600.00

Pro : Enough for around 6000 newly issued passes, 4200 passes with occasional updates and notifications, or 400 highly active passes with daily engagement.

PURCHASE PRO CREDIT BUNDLE FOR £90.00

[See pricing page for credit cost breakdown](#)

If you move to one of our pay monthly plans, then you will no longer see this page.

Invoices

Here you will find past invoices.

Credit usage

This report shows you when you have used credits.

Payment card

Add a payment card before you buy credits. We use Stripe to manage our payments. Smartix retains only your expiry date and last four card number digits. Your actual card details are only held by Stripe.

Apply for contract plan

Smartix offers a monthly payment plan. We offer lower rates in exchange for a minimum monthly spend and a notice period.

Monthly contract plans are available to verified businesses. We may carry out a credit check.



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[Smartix Studio](#)

[Documentation](#)

[YouTube](#)

[Demo Passes](#)

Account

Manage your account here.

Profile

Manage your name, email and password here

Company details

Manage your company name (where applicable) and contact details.

Users

You may add additional users to your account. These can have access to Studio and/or access to Smartix Scan App.

Admin users can buy credits, manage company details and delete your Smartix account.

API keys

In order to use our API, Zapier or Shopify you will need an API key.

You can have as many API keys as you need. You should have a separate API key for each application that connects to Smartix.

Rotate your keys from time to time to maintain maximum security.

When you create an API key you must choose the application that will use the key: Zapier, Shopify or a custom application (ie. Use our API directly).



Table options

Test Passes	☐	Live Passes	 REFRESH DATA					
-------------	--------------------------	-------------	--	---	---	---	---	---

All our tables have the same options on the right:

Search – filter table by searching for a value

Filter – filter the table data – you can apply a filter to any number of columns. Eg. filter on expired > a date, or value is between 10 and 20 etc.

Columns – decided which columns you wish to see

Compact – shrink rows to fit more data into the visible area

Full screen – make the table use the entire browser window. Hit ESCape to return

Download – download the table data in your preferred format.



Introducing Smartix Studio.....	1
Overview	1
Your list of templates.....	3
New template	5
Choose a base template	6
Template Details	7
Managed Loyalty / Stamp Card.....	7
Managed Gift.....	8
Edit Template	8
Editor Layout	9
Editor	12
Editor settings.....	15
Variables / Dynamic Values editor	16
Add a variable	18
Download data template.....	19
Synchronise.....	20
Duplicate Template.....	21
Archive Template.....	21
Create Passes	22
Manage passes.....	26
View pass details	26
Edit pass.....	27
Pass Actions.....	27
Scan history	27
Install pass.....	28
Edit passes	29
Delete passes.....	29
Notify passes	30
Notification history	31
Notify selected passes / Notify ALL passes	31
Reports and statistics	32
Pass Activity.....	32
Adoption	32
Template changes	32
Installs.....	32
Scans.....	32
Pass types.....	32



Install report	32
Managed pass data	32
Billing	33
Buy credits	33
Invoices	33
Credit usage	33
Payment card	33
Apply for contract plan	33
Account	34
Profile	34
Company details	34
Users	34
API keys	34
TIPS	35
Table options	35