Gift certificates - sell them, print them, spend them

Gift certificates are the simplest thing a store can sell: money a customer pays you now and spends later. Listrak Converse sells them in a conversation on the shopper's own phone and on your website, prints them on paper, spends them at your till a little at a time, and tells your finance team exactly what you still owe. This guide walks through the whole life of a certificate, from the offer you make to the last dollar spent.

What a gift certificate is in Converse

A gift certificate is an offer of its own kind, **Gift certificate**, beside coupons, deals and rewards. What makes it different:

- **It is cash.** Whoever holds its code can spend it, so Converse shows only the last four characters of the code everywhere except the printed certificate itself and the till that scans it.
- **It never expires and carries no fees.** The offer's start and end dates only say when it is on sale.
- **It is spent by an amount.** The till takes what the shopper wants to spend, and whatever is left stays on the certificate for next time.
- **It is bought, never handed out.** A courtesy certificate you give away is a promotion, not a gift certificate, so a certificate can't be granted, clipped or earned as a reward.
- **It earns no points and takes no coupon** when it is spent. Points are earned on what the shopper buys with it, by scanning their own member card.

Make one

In the Portal, open **Offers**, select **New offer** and choose **Gift certificate**. Then:

1. Type the amounts it sells, such as 25, 50, 100 and 250. You can list up to nine.
2. Choose whether shoppers may also pick their own amount in a range, and in what increments.
3. Choose whether a gift may carry the buyer's message.
4. Optionally add bonus points for buying one, such as "Buy a $50 gift certificate, get 500 bonus points".
5. Publish it. Each certificate has a ceiling of 2,000.00, and a buyer can buy up to 2,000.00 of certificates in a day.

Converse gives every certificate its own code from a pool it keeps topped up for you, or from a pool of codes you uploaded from your own system.

Sell it

In a conversation. Shoppers buy a certificate the same way they buy a deal: in a chat on their phone they pick the amount, say whether it is for themselves or a gift, write who it is to and from and an optional message, and pay in the payment moment. The certificate lands in their wallet with its code. The ready-made Loyalty presets include the moments to buy one.

On your website. The gifts add-in shows your certificates with a Buy button for each amount. A tap opens the shopper's messaging app with the amount already chosen, and they finish in the chat. A certificate you sell in one amount shows that amount on its card. **Another amount** opens the chat with the shopper's choice in the message: a "Buy a gift certificate" conversation built to read that choice asks for their own amount straight away, and one that does not read it yet shows the amounts again, where the shopper picks **Another amount**. On a computer, the add-in says the short code to text and the number to text it to. Your website never takes a payment. See Loyalty on your website `developer sign-in` for the line of code.

With points. When your program lets points pay toward gift certificates, a member can put their points toward one and pay the rest on their card. This is off by default, because points put toward a certificate become value a person can spend like cash - see Gift certificates and the law.

Print it and pass it on

The holder prints the certificate from their wallet on your website or from the chat: it opens on its own page with your name (and your logo, once your workspace has one), the amount in figures and in words, who it is to and from, the message, the whole code with a barcode and a QR code, how to use it and its terms. They can print it or save it as a PDF. The page opens even if your program is not on your website: the signed print link is the proof.

A certificate can be passed on as a gift. When the friend claims it, it moves to their wallet with a new code, and the old code stops working - a paper copy printed before it moved no longer works either.

Your team can print a fresh copy for a holder from the sale's page in the Portal, and correct the words printed on a gift.

Spend it at the till

At the register, on the phone till or in the Portal, the clerk scans the certificate's barcode or QR code, or types its code. The till shows **Gift certificate** and what is left on it, and names no shopper, because whoever holds the code spends it. The clerk types the amount to take, or leaves it blank to take the smaller of what is owed and the balance, and selects **Redeem**. The receipt says what is left on the certificate. See the Merchant redemption guide.

A point-of-sale system does the same through the Loyalty API: look the code up, then redeem it with the amount to take. A certificate is tender, applied after any discounts. See the POS integration guide.

Check a balance

Anyone holding a certificate can check what is left on it by typing its code into **Check a balance** on the gifts add-in. The answer never says who holds it, and repeated guesses are slowed down like a sign-in.

Refunds

A refund sends money back through your payment provider, and you choose how much of the balance still on the certificate to return.

- **The whole balance.** The certificate stops working at once. Whoever holds it loses it, so the Portal reminds your team to let them know.
- **Part of it.** The certificate keeps the rest, ready to spend at the till or online. Converse takes the refunded amount off the balance before your provider is asked, so nobody can spend it while the money goes back. If your provider turns the refund down or can't be reached, Converse checks with it before putting the amount back - within about a quarter of an hour - so a refund that did go through is never paid twice.

Each sale is refunded once, so after a partial refund the rest is spent, not refunded. When a member used points toward the certificate, their points come back in the same share as the money. If a refund is interrupted, refund again - Converse finds the refund your provider already made and never pays anyone back twice. The refund panel in the Portal tells you which refunds your workspace offers: if it offers only the whole balance, partial refunds are not switched on for you yet.

What you still owe

The Portal's **Gift certificates** page shows, for each currency, what you still owe today and on how many certificates, how many have not been used in a while, and what was sold, spent and refunded in any window - by offer, ready to download for your finance team. Amounts in different currencies are never added together.

Related documents

- Gift certificates and the law - what Converse enforces and what your counsel decides.
- Merchant redemption guide - spending one at the till.
- POS integration guide - the register calls.
- Loyalty on your website `developer sign-in` - the gifts add-in.