Gift certificates

What this page is for

A gift certificate is money your members pay you now and spend later, in the store or online, a little at a time if they like. **Gift certificates** shows you two things about them: how much your certificates have sold and how much you still owe on them today, and every sale, so you can print a fresh copy for someone or refund one.

Gift certificates never expire. What a person paid for stays theirs until it is spent or refunded, so the amount you still owe is the number to keep an eye on.

How a member buys a gift certificate

A gift certificate is an offer of the kind **Gift certificate**, which you make on the Offers page. You choose the amounts it sells, such as 25, 50, 100 and 250, and whether shoppers may also choose their own amount in a range.

Members buy one in a conversation 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. The certificate lands in their wallet with its own code, ready to print or pass on. On your website, the gifts add-in shows your certificates with a Buy button for each amount that opens the conversation with the amount already chosen.

The code on a gift certificate is spent like cash: whoever holds it can spend it. That is why Converse shows only its last four characters everywhere except the printed certificate itself and the till that scans it.

The codes are ready as soon as you publish a gift certificate. Unless you loaded your own codes, Converse makes a batch of its own and keeps it topped up, so you can see the certificate's codes on Coupon codes before anyone buys one.

What you see

- *The tabs.* **Still owed** shows the money side, and **Sales** lists every certificate sold.
- *The days.* **Last 7 days**, **Last 30 days** and **Last 365 days** choose the window for what was sold, spent and refunded. What you still owe is always as of right now, whatever the window.
- *Still owed.* For each currency you sell in: what you still owe and on how many certificates, how many have not been used in a while, and in the window how many were sold, how many of those were gifts, what was spent at the till and what was refunded. Amounts in different currencies are never added together.
- *The table.* The same numbers for each gift certificate offer.
- *Sales.* One row per sale: when it was bought, the member's number, who it was bought for, the price and the status. Select the time to open the sale.

What you can do

See what you still owe

1. Open **Gift certificates** and stay on **Still owed**.
2. Read the money still owed on certificates people hold today, and how many of them have not been used in a while.
3. Choose **Last 30 days** or another window to see what was sold, spent and refunded in it.

Download the numbers

1. On **Still owed**, select **Download**.
2. Open the file in a spreadsheet. It has one line per offer and currency, with every number on the page.

Open one sale

1. Select **Sales**, then select the time of the sale you want.
2. The sale opens as **Gift certificate sale**. It shows what was bought, the price, the member, **Bought for** (themselves, or a gift with who it is to and from and the message) and the certificate's **Reference**, which you can quote to the holder.
3. When the member used points toward it, the sale says how many points and how much they took off, and what was charged to the card.

Print a fresh copy for someone

1. Open the sale and find **The certificate**.
2. Select **Print the certificate**. Converse opens the certificate with its words, the amount and its code, ready to print or save as a PDF.

A certificate that was passed on to someone else, refunded or spent in full can't be printed here.

Correct the words on a certificate

1. Open the sale of a gift and select **Correct the words**.
2. Change **To**, **From** or **Message**. Leave a box empty to take its words off.
3. Select **Save the words**. The next print carries the new words.

Refund a gift certificate

1. Open the sale and go to **Refund**.
2. Read what you can refund: the balance still on the certificate. Leave **Amount to refund** empty to refund all of it, or type less to refund part of it - when the panel says the certificate keeps the rest. Under **Why**, say why.
3. Select **Refund**, read the amount, then select **Yes, refund it**.

Refund the whole balance and Converse stops the certificate working first, so nobody can spend it while the refund goes through, and then the money goes back through your payment provider. Whoever holds the certificate loses it, so let them know.

Refund part of it and Converse takes that amount off the balance first, then the money goes back through your payment provider. The certificate keeps working for the rest, and the page says how much is still on it. If your provider turns the refund down or can't be reached, the amount stays held while Converse checks with your provider, then goes back on the certificate - within about a quarter of an hour - unless the refund did go through after all.

How it fits

Gift certificates bring money in before anyone shops and bring people back into your stores to spend it. Make the certificate on Offers, put a "Buy a gift certificate" conversation's launch code in your program's **On your website** settings, and members can buy from your site or a message. When a holder spends it, the till takes the amount from the certificate, and this page shows what is left to owe.

Good to know

- Gift certificates never expire and carry no fees. The start and end dates on the offer only say when it is on sale.
- A gift certificate earns no points when it is spent at the till, and no coupon applies to it. A member scans their own member card for their points.
- When your program lets points pay toward gift certificates, points put toward one become value a person can spend like cash. Check with your counsel before you turn it on in the program's **Use points toward purchases** settings.
- This page names members, so it is for the Loyalty manager. A merchant's own staff see only their merchants' certificates.
- One refund per sale. After part of a certificate has been refunded, the rest stays on it to be spent.
- If the refund panel offers only the whole balance, partial refunds are not switched on for your workspace yet.
- If you see that a refund is already under way, look again in a few minutes. While a refund is going through, a link someone sent to pass the certificate on waits too.

Related pages

- Offers: make a gift certificate and choose its amounts.
- Deal sales: the deals your members bought.
- Redeem at the register: take an amount from a certificate at the till.
- Members: the certificates in a member's wallet.