Members

What this page is for

Members is where you look after the people in your loyalty program. Find a member by the number or phone they show you, see what they hold in their wallet, put an offer in it, look after their points, see their visits, and, when a person asks to be forgotten, erase them.

A member is known by their mobile number. You add members here, and your own systems can add them through the Loyalty API. A person can also join on their own inside a conversation that offers it - one they start by scanning your QR code or texting a keyword - because the conversation already knows the number they are texting from; the conversation needs a joining moment for that. Joining from the sign-in on your own website is coming.

What you see

- *Find a member.* One field for a member number or a phone, with **Find**. When your workspace runs more than one program, choose the program the phone belongs to.
- *Everyone in your program.* Loyalty managers see the list: each member's name and number, their phone and email, their status and tier, their points and visits, and when and how they joined. Search by name, number, phone or email, or narrow it by status and program.
- *One member.* At the top, their points (and what they have earned in all), their tier and how far they are from the next, their visits and their status. Below, the tabs **Profile**, **Wallet**, **Points**, **Visits**, **Gift links** and, for whoever may, **Erase**.

Store staff at a merchant you work with see a member trimmed: their number, first name, status, tier and balance. Their phone, email and birthday stay private, and staff open a member by their member number.

What you can do

Find a member

1. Type the member number or the phone the member shows you, then select **Find**.
2. The member's page opens. A Loyalty manager can also type any words to search the list.

Add a member

1. Select **Add a member**.
2. Type their phone with its country code, and their name and email if you have them.
3. Select **Add them**. The member's page opens.

The program's terms and a choice to hear about offers belong to the member. They accept them in their own conversation, never on this page.

Change a member's profile

1. On **Profile**, change their name, email, phone or birthday.
2. Select **Save** on the bar at the bottom of the page.
3. When you changed the phone, Converse asks first, because the phone is the key to the member's wallet and points. Select **Change the phone and save** only when the member asked you to.

A member who came from another system keeps the name, email and birthday that system sends. Change those there.

Suspend a member, or mark that they left

1. On **Profile**, under *Status and tier*, choose the new status, then select **Change the status**.
2. Read what it does, then select **Yes, change their status**.

A suspended member can't use their wallet or earn points until they are active again. A member who leaves keeps their redemptions and points as history.

Set a member's tier by hand

1. Choose the tier, then select **Set this tier**, and **Set the tier** to confirm.
2. Or select **Work it out from the rules** to put them back where the program's rules say.

A tier set by hand holds until their next points entry, because every entry works the tier out again.

Put an offer in a member's wallet

1. On **Wallet**, select **Put an offer in their wallet**.
2. Choose the offer. Converse says which version of the offer they get and whether a code comes from its pool, or that the pool is empty.
3. Select **Put it in their wallet**.

The member keeps the terms as they were published that day. Later changes to the offer never change what they hold. Deals are bought, never handed out, so they are not listed.

Expire, reactivate or take back an item

1. On **Wallet**, select **Open** beside the item. You see its version, its dates, its code and what happened to it.
2. Select **Mark it expired**, **Make it ready again** or **Take it back**, read what it does, and confirm.

An item that was used, given to a friend or taken back stays that way.

Record that a member used an item

Use this when a member tells you they used a coupon online, or at a store with no scanner.

1. Open the item and select **Record that they used it**.
2. Choose where, and add their receipt or order number if you have it.
3. Select **Record the use**. It is recorded once, even if you select it twice, and reported apart from register redemptions.

Change a member's points

1. On **Points**, select **Change their points**.
2. Choose **Add**, **Take away**, **A bonus** or **Expire**, and type how many.
3. Under **Why**, say why. It is required for **Add** and **Take away**, and the ledger keeps it.
4. Select the button to write it. The new balance shows at once.

The ledger is never edited. Every change is a new line, newest first.

When Converse can't tell whether a change was written, it says so and reads the ledger again, and the change can't be edited. Check the newest lines. Select **Try again** to send the same change - it is never written twice - or **Cancel** to leave it.

See a member's visits

On **Visits**, choose **Last 30 days**, **Last 90 days**, **Last year** or **Every visit**. Each visit says the store, the day and how it was proved, from scanning the register's code (the strongest proof) to picking the store (no proof). For a shared location you see only how far from the store they were.

See a member's gift links

On **Gift links**, see every coupon this member shared with a friend and every gift they claimed from one, newest first. Each line says the offer, whether it was a copy (both keep one) or passed on (it leaves the sender), when the link was made, when it ends or was claimed, and whether it is *Open*, *Claimed*, *Expired* or *Taken back*. The other member shows only by number. The link itself is never shown here: only the member who made it holds it. While a link is open, the Loyalty manager can select **Take the link back** to stop it working.

Erase a member

Before you start, check whether a legal hold covers the person: a hold stops the erase. Holds are on the **Compliance** page, under **Evidence**.

1. On **Erase**, select **See what an erase removes**.
2. Read what goes and what stays. Redemptions and points entries stay as your stores' sales history, with nothing left that leads back to the person.
3. Type their member number, then select **Erase this person**.

A legal hold on the person stops the erase, and nothing is erased. Release the hold on the **Compliance** page first.

Look after a member's gift certificate

A gift certificate in a member's wallet shows what is left on it and only the last four characters of its code, because whoever holds the code can spend it. Select **Open the sale** to reach the sale it came from, where you can print a fresh copy of the certificate or refund it.

When a member uses points toward a purchase, their points history says **Toward a purchase** and names the order the points went toward.

Good to know

- Only a Loyalty manager who works across the whole workspace sees the member list, changes a profile, status or tier, changes points or erases a member.
- Store staff see only the wallet items of their own merchants' offers, and the visits to their own stores.
- **Recount their totals** in the ⋯ menu works a member's balance, lifetime points and visits out again from their ledger.
- **See their redemptions** in the ⋯ menu opens the redemptions list for this member alone. **Open the register desk** opens the register with the member already looked up.
- On **Wallet**, each use in an item's story opens that redemption, where it can be undone.
- Every look at a member is recorded in the Compliance Center's read-access log.
- Members can share some coupons with a friend from their wallet on your website or in the conversation, when the offer's rules allow it: as a copy they keep, or passed on so it leaves their wallet when the friend claims it. The friend's coupon arrives in their wallet as a gift, and the item's story says where it came from. A member's shares are not listed on this page yet. Your systems or an AI assistant on Converse's MCP server can look at one share by its link and take back one nobody has claimed.

Related pages

- Redeem at the register: look a shopper up and redeem what they show you.
- Redemptions: what members used, where and when.
- Coupon codes: the codes the items in a wallet carry.
- Offers: the coupons, deals and rewards you put in a wallet.
- Stores & Loyalty Center: your program, its points and tiers.