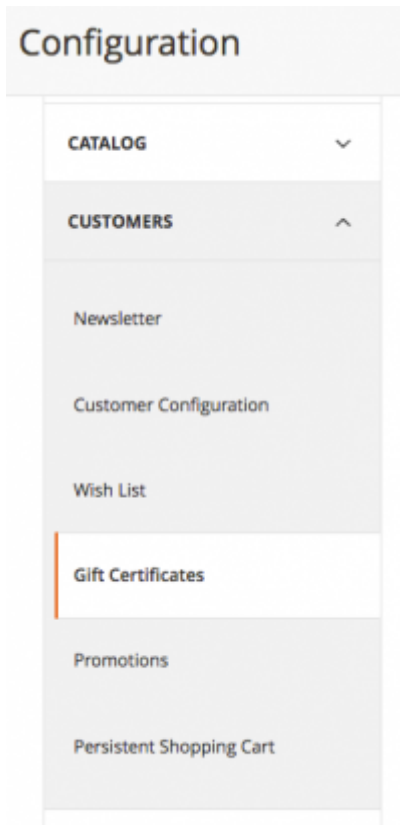


# Global uGiftCert configuration

Main configuration of uGiftCert can be found in Stores → Configuration → Customers section, Gift Certificates tab.



Entire configuration tab consists of 5 groups:

- Defaults
- Gift certificate totals
- Gift certificate customer interface on catalog product view
- Email delivery options
- Physical delivery options
- Administrative Configuration

We will cover all sections.

## Defaults

Defaults



Auto generate certificate number [website] Yes

Certificate number pattern [website] [A\*5]-[AN\*5]

Use PIN [website] Yes

Auto generate PIN [website] Yes

PIN pattern [website] [N\*4]

Pattern examples:  
[A\*8] - 8 alpha chars  
[N\*4] - 4 numerics  
[AN\*5] - 5 alphanumeric  
CERT-[A\*4]-[AN\*6] - CERT-HQNB-BA1N03

Default status [website] Pending

Change status to active on payment completion [website] No

Amount values configuration [website] 50-1500

Pattern examples:  
50 - 1500 : a range between \$50 and \$1500  
25; 50; 100 : a dropdown with values of \$25, \$50, \$100  
50 : a static value of \$50  
- : enter "dash" to allow any amount value  
For multi-currency setups enter configuration for each currency on new line, like this:  
EUR: 25; 50; 100  
CAD, USD: 50; 100; 200  
\*: 100; 200; 500  
Whitespaces are optional and will be ignored.

Default Expiration Timespan (in days) [website]

Used only for frontend orders.

Use certificate conditions [global] Yes

Add certificate info to order details [store view] No

Domains included in your license [store view]

Provide a list of domains included in your license. Leave empty if you have single domain Magento or server level license.  
**Note:** Any value provided here will be compared to current domain on frontend, if a match is not found some GC features will be disabled.

Allow only one certificate per order (Single mode) [store view] No

Error message in single mode [store view] You can use only one certificate per order.  
Message that will be displayed to client when "Single mode" is enabled and more than one certificate is applied to order.

Disallow coupons with certificates [store view] No

Disallow coupons for specific certificates only [store view] No

Disallow coupons only if certificates in cart are set to not allow them.

Error message when coupons are not allowed. [store view] You can not use both certificate and coupon in same o  
Message that will be displayed to client when coupons are not allowed with certificates and user tries to apply coupon code.

Check certificate store [store view] No

## Auto generate certificate number

Auto generate certificate number [website] Yes

If set to Yes all certificate codes will be auto-generated. If set to No, admin user will need to go to Customers → Gift Certificates menu and set certificate code manually before the certificate could be used. There is a chance that if payment for certificate order is received before code is set the

customer will receive gift certificate email without certificate code. Generally it is recommended to auto generate codes.

---

### Certificate number pattern

Certificate number pattern [website]

Simple pattern expression used for certificate code generation.

---

### Use PIN

Use PIN [website]

Should PINs be used for customer gift certificates balance checking.

---

### Auto generate PIN

Auto generate PIN [website]

Should PIN be auto generated or input by admin user (similar to **Auto generate certificate number** setting)?

---

### PIN pattern

PIN pattern [website]   
Pattern examples:  
**[A\*8] - 8 alpha chars**  
**[N\*4] - 4 numerics**  
**[AN\*5] - 5 alphanumeric**  
**CERT-[A\*4]-[AN\*6] - CERT-HQNB-8A1NO3**

Simple pattern expression used for PIN generation

---

### Default status

Default status [website]

Default status for when certificate is generated - **pending** means certificate is valid, but cannot be used yet, **active** means certificate is valid and can be used, **inactive** means certificate cannot be used anymore.

### Change status to active on payment completion

Change status to active on payment completion [website]

Should certificate status be changed to active automatically when payment is received? If set to No then certificates will have to be enabled manually.

### Amount values configuration

Amount values configuration [website]

Pattern examples:  
**50 - 1500** : a range between \$50 and \$1500  
**25; 50; 100** : a dropdown with values of \$25, \$50, \$100  
**50** : a static value of \$50  
 - : enter "dash" to allow any amount value  
 For multi-currency setups enter configuration for each currency on new line, like this:  
**EUR: 25; 50; 100**  
**CAD, USD: 50; 100; 200**  
**\*: 100; 200; 500**  
 Whitespaces are optional and will be ignored.

Default certificate amounts. This setting can be overridden on by certificate basis. If using single value, make sure that it is just the value without semicolons or any other character following it. If using currency coded setting make sure you have at least 2 rows set. Setting only USD: 25; 50; 100 by it self will produce 3 prices with \$0 for first entry. Generally if you use one currency then you should not use currency coding.

### Default Expiration Timespan (in days)

Default Expiration Timespan (in days) [website]

Used only for frontend orders.

Period after certificate **creation** during which certificate can be used. This setting can be overridden on by certificate basis on certificate management page. **Is it possible to set this on by product**

## basis???

---

### Use certificate conditions

Use certificate conditions  [global]

Enable usage of conditions similar to shopping cart conditions, which determine if certificate can be used with current cart items. These conditions can be set on per Gift Certificate product or per Certificate basis.

---

### Add certificate info to order details

Add certificate info to order details  [store view]

This allows to add information for purchased and redeemed certificates to order data. Mostly useful if you want to integrate this data with external accounting system.

---

### Domains included in your license

Domains included in your license  [store view]

Provide a list of domains included in your license. Leave empty if you have single domain Magento or server level license.  
**Note:** Any value provided here will be compared to current domain on frontend, if a match is not found some GC features will be disabled.

Comma separated list of domains that the license of Giftcert is valid for.

---

### Allow only one certificate per order (Single mode)

Allow only one certificate per order (Single mode)  [store view]

Enable this if you want to allow to your customers to be able to use only one certificate per order.

---

## Error message in single mode

Error message in single mode  
[\[store view\]](#)

You can use only one certificate per order.

Message that will be displayed to client when "Single mode" is enabled and more than one certificate is applied to order.

You can customize what is shown to customers when they try to use more than one certificate, when this is not allowed.

---

## Disallow coupons with certificates

Disallow coupons with certificates  
[\[store view\]](#)

No

Enable this when you want to prevent coupons and certificates from being used together. **This may not work out of the box with 3rd party checkout modules.**

---

## Disallow coupons for specific certificates

Disallow coupons for specific certificates only  
[\[store view\]](#)

No

Disallow coupons only if certificates in cart are set to not allow them.

Enable this when you want to prevent coupons from being used to discount certificates. **This may not work out of the box with 3rd party checkout modules.**

---

## Error message when coupons are not allowed

Error message when coupons are not allowed.  
[\[store view\]](#)

You can not use both certificate and coupon in same o

Message that will be displayed to client when coupons are not allowed with certificates and user tries to apply coupon code.

Customize/translate error message here

---

## Check certificate store

Check certificate store  
[\[store view\]](#)

No

Enable this to limit certificate usage only to the store which is assigned to certificate.

## Gift certificate totals

Gift certificate totals ⤴

Exclude these totals [website]

- None
- Subtotal
- Tax Subtotal
- Weee
- Shipping
- Tax Shipping
- Discount
- Tax
- Weee Tax

Any selected totals will be excluded from certificate total calculations.

In case for example you don't want shipping to be paid with certificates, you can select it in above list and it will be excluded from calculations.

## Gift certificate customer interface on catalog product view

### Gift certificate customer interface on catalog product view



|  |   |
|--|---|
| Allow multiple recipients<br><small>[website]</small>        | <input type="text" value="No"/>   |
| Allow custom message<br><small>[website]</small>             | <input type="text" value="Yes"/>  |
| Custom message max length<br><small>[website]</small>        | <input type="text" value="320"/><br><small>Leave empty for unlimited</small>                        |
| Enable custom message preview<br><small>[store view]</small> | <input type="text" value="No"/>   |
| Display full totals info in cart<br><small>[website]</small> | <input type="text" value="Yes"/>  |
| Use customer group limitation<br><small>[store view]</small> | <input type="text" value="No"/>   |
| Balance check URL<br><small>[store view]</small>             | <input type="text"/><br><small>Leave empty for default url<br/>(ugiftcert/customer/balance)</small> |

### Allow multiple recipients

|                           |                                 |           |
|---------------------------|---------------------------------|-----------|
| Allow multiple recipients | <input type="text" value="No"/> | [WEBSITE] |
|---------------------------|---------------------------------|-----------|

**Experimental.** Enable to allow adding multiple certificates to different recipients from same product. All added certificates will have same settings, except for sender and recipient data.

### Allow custom message

|                      |                                  |           |
|----------------------|----------------------------------|-----------|
| Allow custom message | <input type="text" value="Yes"/> | [WEBSITE] |
|----------------------|----------------------------------|-----------|

Allow custom gift message that will be attached to confirmation email. If physical shipping is used, store owner has to take care of printing out the message. What html are tags allowed???

### Custom message max length

|                           |  |           |
|---------------------------|--|-----------|
| Custom message max length | <input type="text" value="320"/>           | [WEBSITE] |
|                           | <small>▲ Leave empty for unlimited</small> |           |

Maximum message length.



## Enable custom message preview

|                               |                                 |              |
|-------------------------------|---------------------------------|--------------|
| Enable custom message preview | <input type="text" value="No"/> | [STORE VIEW] |
|-------------------------------|---------------------------------|--------------|

### Deprecated

Provide real time message preview. If Yes then text sample is shown above product image.

**This setting will probably be removed as it does not show reliable preview, do not rely on it and best leave it to 'No'**

## Display full totals info in cart

|                                  |                                 |           |
|----------------------------------|---------------------------------|-----------|
| Display full totals info in cart | <input type="text" value="No"/> | [WEBSITE] |
|----------------------------------|---------------------------------|-----------|

If set to No then Gift Certificate applied in cart is allowed to be removed and its code is displayed.

## Use customer group limitation

|                               |                                 |              |
|-------------------------------|---------------------------------|--------------|
| Use customer group limitation | <input type="text" value="No"/> | [STORE VIEW] |
|-------------------------------|---------------------------------|--------------|

Enable this to have certifiante usage limited to specified customer group. Customer groups are specified in certificates or certificate products.

## Balance check URL

|   |  |              |
|---|--|--------------|
| Balance check URL   | <input type="text" value="balances.html"/> | [STORE VIEW] |
| <small>▲ Leave empty for default url<br/>(ugiftcert/customer/balance)</small> |  |              |

Set this to whatever URL path fits your SEO or store needs. The page will show balance check form regardless of customer being logged in or not.

## Email delivery options

## Email delivery options



|   |   |
|---|---|
| Enable email notifications<br><small>[website]</small>                          | Yes   |
| Allow recipient's email<br><small>[website]</small>                             | Yes   |
| Send new GC confirmation<br><small>[website]</small>                            | On order completion   |
| Allow scheduled sending<br><small>[store view]</small>                          | Yes   |
| Gift Certificate Email Sender<br><small>[store view]</small>                    | General Contact   |
| Gift Certificate Email Template for Someone Else<br><small>[store view]</small> | New Gift Certificate to Someone Else (Default)  |
| Enable PDF printouts<br><small>[global]</small>                                 | Yes   |
| Gift Certificate PDF Template<br><small>[store view]</small>                    | Blue card PDF   |
| PIN format for email confirmations<br><small>[store view]</small>               | <code>&lt;br /&gt;PIN: %s&lt;br /&gt;</code><br>%s will be replaced with PIN.<br>Pattern example:<br><code>&lt;br /&gt;PIN: %s&lt;br /&gt;</code> |
| Enable email and PDF variants<br><small>[store view]</small>                    | Yes   |

### Enable email notifications

|                            |     |           |
|----------------------------|-----|-----------|
| Enable email notifications | Yes | [WEBSITE] |
|----------------------------|-----|-----------|

Set this to Yes to have email notifications at all.

### Allow recipient's email

|                         |    |           |
|-------------------------|----|-----------|
| Allow recipient's email | No | [WEBSITE] |
|-------------------------|----|-----------|

If set to Yes customer will be allowed to fill in another recipient email address so that when order is completed, the other person receives Gift Certificate email straight away. If set to No and buyer wants to buy GC for someone else, she will need to manually forward details to that person, or use physical address for shipping.

### Send new GC confirmation

|                          |                     |           |
|--------------------------|---------------------|-----------|
| Send new GC confirmation | On order completion | [WEBSITE] |
|--------------------------|---------------------|-----------|

### When to send GC confirmation email

1. **On order completion** - right after order is placed, or
2. **On payment completion** - after payment is made or
3. **Never** - (send confirmation manually).

Beware that if you set this to **On order completion** buyer can get Gift Certificate details before paying for it. Best to use this option if your payment method submits order **after** receiving payment. If set to **Never** no notifications will be sent

### Allow scheduled sending

Allow scheduled sending  [STORE VIEW]

Enable schedule for certificates. If this is set to 'Yes', customers will get a calendar widget via which they can choose a date for sending certificate. For this to work, Magento cron jobs must be configured and running for the site.

### Gift Certificate Email Sender

Gift Certificate Email Sender  [STORE VIEW]

Email contact on whose behalf GC emails will be sent. Configurable in System→Configuration→General→Store Email Addresses

### Gift Certificate Email Template for Someone Else

Gift Certificate Email Template for Someone Else  [STORE VIEW]

Transactional email template to be used when GC is bought for someone else but the customer. This and above setting templates can be edited in Transactional email menu. You can edit template files directly, but this is not recommended because your changes will be lost upon extension update. Since in v.2 we have opted for explicit sender and recipient names, we only need one email template. Template for someone else has fields for both sender and recipient and is more suitable than template for self was. Name of this field will probably be changed to only Gift Certificate Email Template

### Enable PDF printouts

Enable PDF printouts  [GLOBAL]

Enable PDF printouts for certificates. If set to Yes, PDFs will be generated and attached to each certificate email.

## Gift Certificate PDF Template

Gift Certificate PDF Template PDF Template for: default [STORE VIEW]

Default PDF template to use. PDF templates can be set per store, per product and per certificate level. If certificate does not have a template assigned, it will use default one for its store. When gift products are sold, their PDF template setting is inherited by created certificates. If product does not have a template configured, then store template is used.

## PIN format for email confirmations

PIN format for email confirmations  [STORE VIEW]  
▲ %s will be replaced with PIN.  
Pattern example:  
<br />PIN: %s<br />

Text format to be used for representing PIN code in customer email.

## Enable email and PDF variants

Enable email and PDF variants Yes [STORE VIEW]

This feature is available only in **Pro** add-on, if it is enabled customers will be able to choose from variations of certificate looks. These variations are configured by admin in product settings.

## Delivery options

## Address Options



Allow recipient's address

[website]

Please note, that in current release shipping estimates will be calculated by purchaser's shipping address and not recipient's.

Always handle GC as virtual products

[website]

Recipient address options

[website]

- Use customer entry
- Use billing address
- Use shipping address

Sender address options

[website]

- Use customer entry
- Use billing address
- Use shipping address

### Allow recipient's address

If set to yes and recipient address is provided, then order process will be conducted as per simple product type (a product that has physical representation and needs to be shipped to customer). If this is No then gift certificates will always be treated as virtual products, that don't need to be shipped.

### Always handle GC as virtual products

If set to 'Yes' then products will always be treated as virtual and no shipping will be calculated during checkout. Still if "Allow recipient's address" is "Yes", customer will be able to fill in recipient physical address.

## Recipient address options

Select how to provide recipient address

- **Use customer entry** means that user will enter recipient email or physical address.
- **Use billing address** means to use checkout billing address for recipient addresses.
- **Use shipping address** means to use shipping address. It is usable only if certificate product is not virtual.

If only selected option is **billing** or **shipping** address, that will effectively send the certificate to the customer who buys it. This is equivalent to previous **send to my self** option.

If you would like to provide customer with option to choose to send to him self or to someone else, select both **billing address** and **customer entry**, this will present customer with dropdown to choose from.

## Sender address options

Select how to provide sender address

- **Use customer entry** means that user will enter sender email or physical address.
- **Use billing address** means to use checkout billing address for sender addresses.
- **Use shipping address** means to use shipping address. It is usable only if certificate product is not virtual.

## Always handle GC as virtual products

If set to Yes GC will always be treated as virtual products regardless if above setting is set to Yes and recipient address is provided.

# Administrative Configuration

## Subscribe for extension update notifications

### Administrative Configuration



Subscribe for extension update notifications  
[global]

Yes

If set to Yes store will receive notification whenever new extension version is available, the same type of notifications as per new Magento releases

From:  
<https://secure.unirgy.com/wiki/> - **UnirgyWiki**

Permanent link:  
<https://secure.unirgy.com/wiki/ugiftcert-3/configure>

Last update: **2017/05/19 19:08**

