Refer a friend

Bosbec Services
English
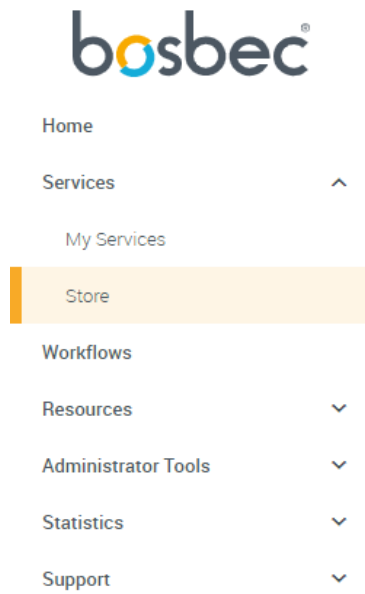
Table of Contents

Preparations

To help you get started with the Refer a friend service, this document will not only show you how to use it but also how to install and configure it.
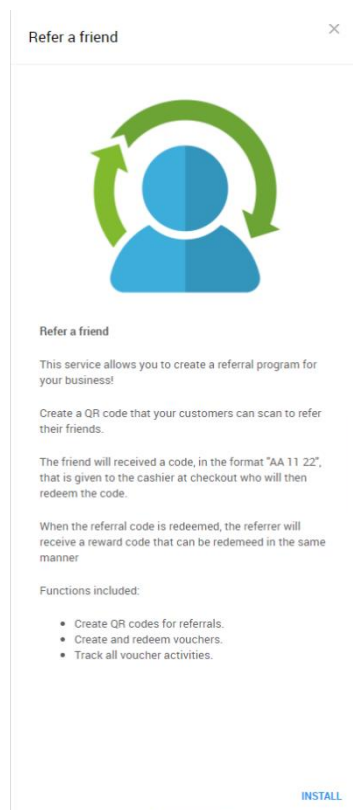
Installation

All Bosbec Services, including the services in the retail package, can be installed from the **Service Store**.

You will find the Service Store in the main navigation menu to the left.

Image 1: Navigation Menu

Find the Refer a friend icon and click it to open the **installation page**.

The installation page contains some information about the features of the service and an install button in the bottom right. Click the install button.

This will bring up an installation prompt where you simply click "*Install*" again.

Image 2: The installation page for Refer a friend

Configuration

You now have your service and related resources installed and you are ready to configure it!

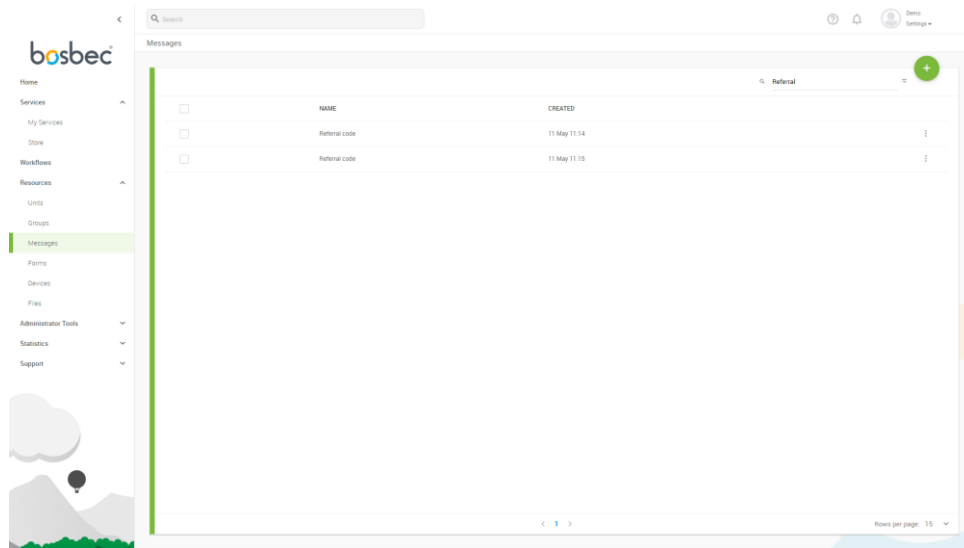Start by going to **Messages** in the main navigation menu.

Image 3: The Messages page

On the Messages page, you will find two new message templates. Click on the first one to bring up its settings.

This is where you can change the message text to whatever suits your business or referral program! Simply change the text in the **Message Body** field.

Note that it is important that the text in brackets is left in the message template, but you are free to move it to a place where it makes the most sense in your custom text. The text *[code_formated]* will be replaced by a code generated for the recipient of the message.

Image 4: "Edit message" drawer

With the message template configured, let us head over to the **My Services** page using the main navigation menu.
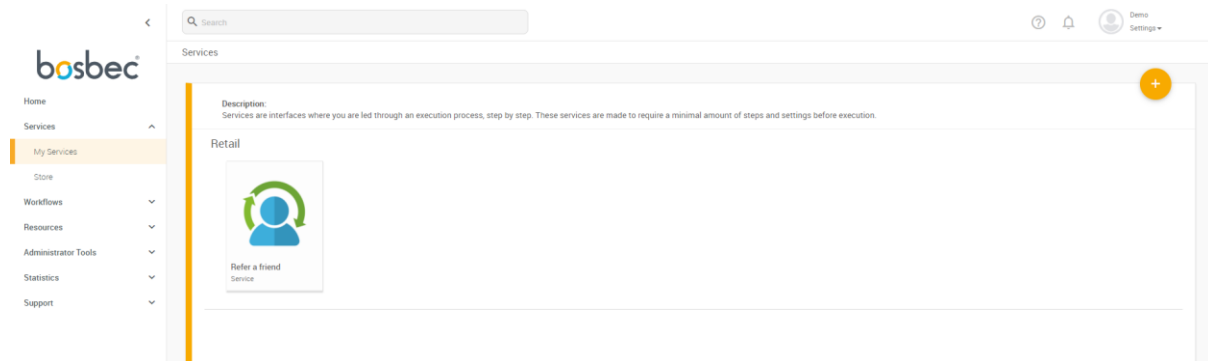

Image 5: My services

This is where you will find all your installed services. Click on **Refer a friend**.
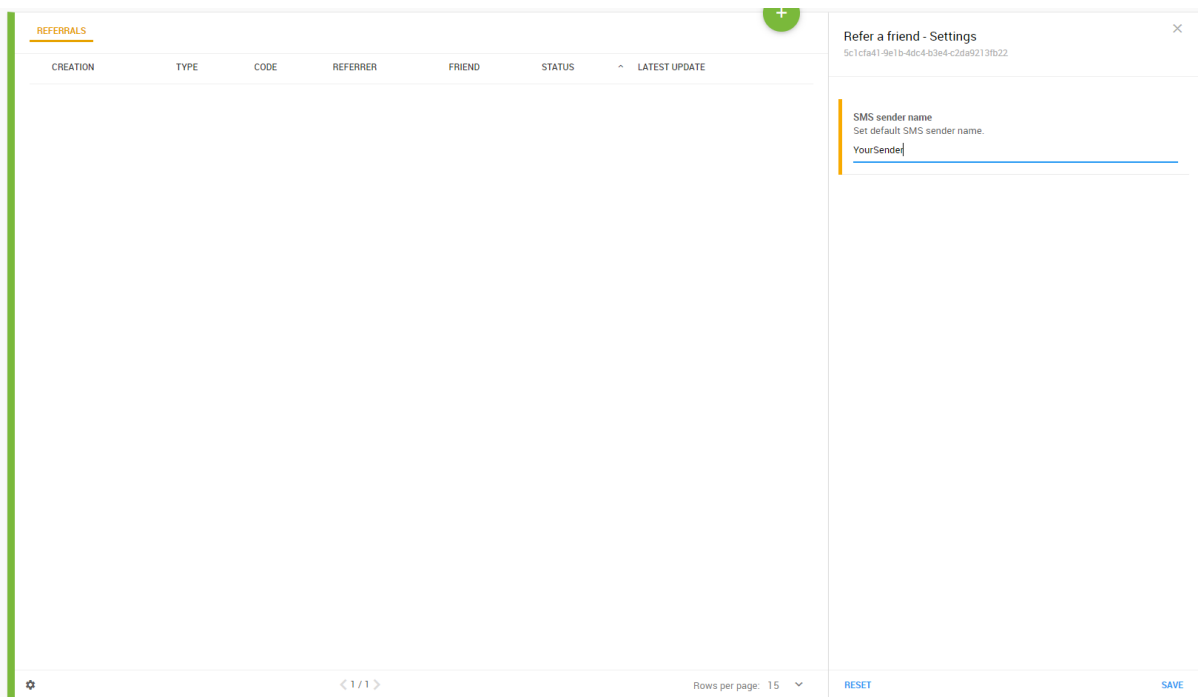

Image 6: The service view with the settings panel opened

This is the service view and from where you will manage your referrals. However, there is still one setting that needs to be configured, SMS Sender name.

Click on the **cogwheel** in the bottom left corner.

This brings up the settings drawer from where you can change the SMS sender name. Note that SMS sender names can contain a maximum of 11 characters (A-Z, a-z and 0-9).

Click on "Save" at the bottom right corner.

You are now ready to start using the service!

How to use

This section provides you with instructions of how to use the service "Refer a friend".

Create a QR code

The first step is to create a QR code. Scanning this code will provide a form where a customer submits his or her credentials as well as the information of the customer's friend. You can print the code and display on a poster.
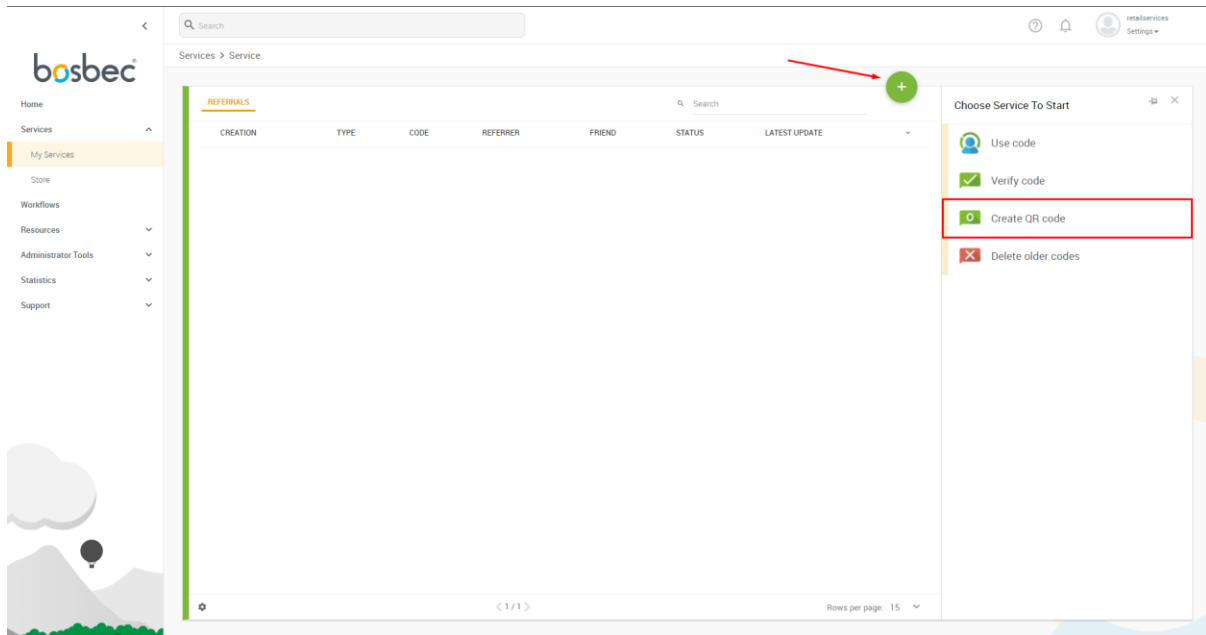

Image 7: In the service "Refer a friend", click the green plus icon and select "Create QR code" in the action list.

This will display a notification banner in the top right corner of your interface. You can either use the code directly in your interface or click the link to get a full image.
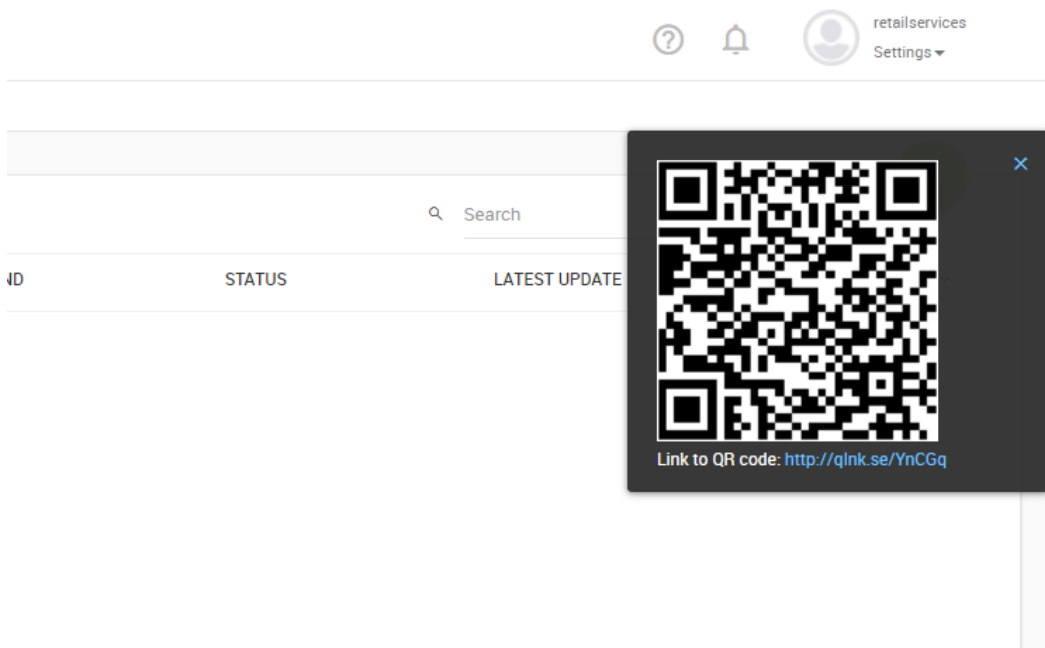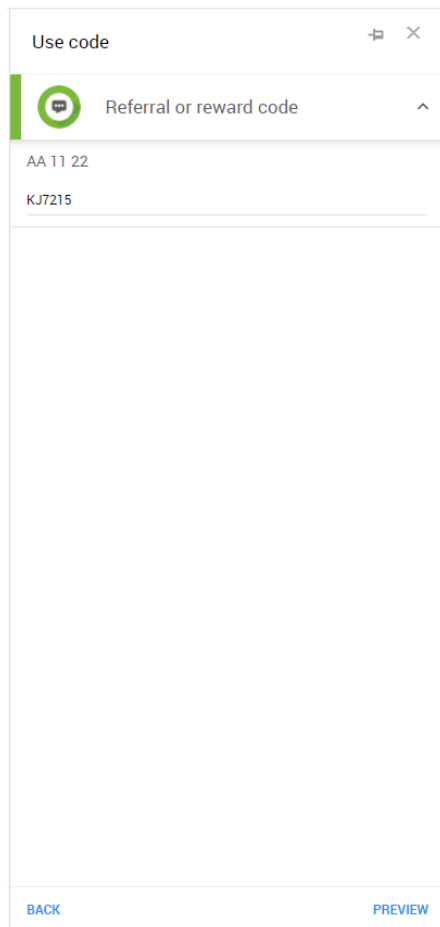

Image 8: A notification banner in the top right corner containing your QR code.

Your service is now running. Once someone reads the QR-code they will receive a SMS with a short-link that leads to a form. Submitting the form with the customers and the customer's friend's credentials will send an SMS to the friend with a discount code. When the customer's friend submits the code, the first customer will in turn receive a discount code.

Use a discount code

Submit the code received by your customer. Click "PREVIEW" then "RUN". This action will update the service dashboard, listing all your discount codes.

If you want to verify the code, you do the same process choosing the "Verify code" action in the navigation bar.

Codes older than a year can be deleted, select the final action in the navigation bar "Delete older codes". This action cannot be undone.

Further reading

This service was built using the Bosbec Workflow Builder and is run using the Workflow Engine. If you want to learn more about these concepts, read more at https://help.bosbec.io/.