



Vouchers

Bosbec Services
English

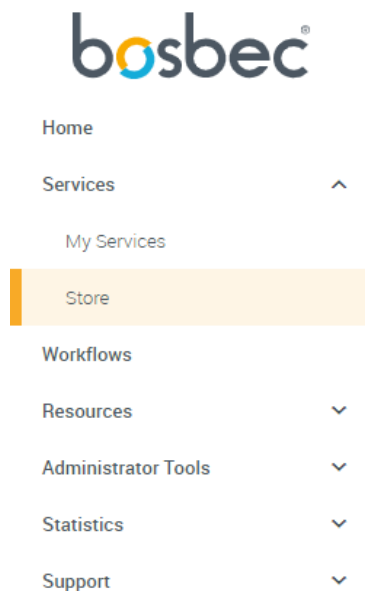
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Preparations

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

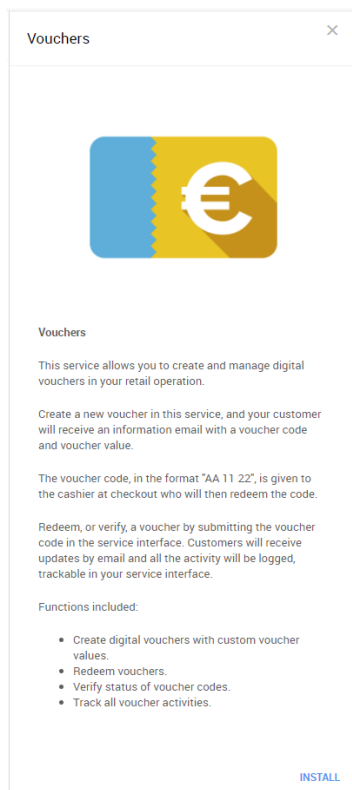
Installation



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 Vouchers 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 Vouchers

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.

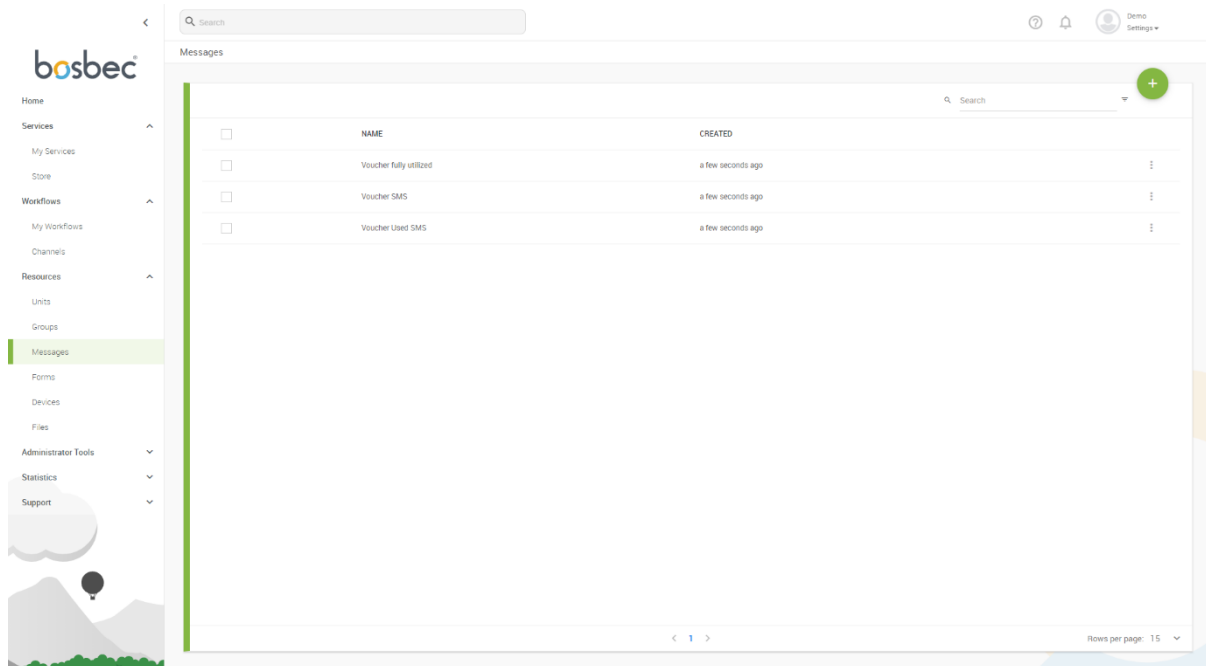


Image 3: The Messages page

Edit message
ff2c7de7-c683-7d43-7b0c-c5d61b6ee636

Message name
Voucher fully utilized

Send as
 Sms
 App
 Email

Sms

Sender name
[sendername]

Message body
Dear customer,
Your voucher, [code_formatted], has been fully utilized.

Flash sms
 Is flash sms

Priority
Normal

Options
SAVE

Image 4: "Edit message" drawer

On the Messages page, you will find three 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! 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 `[letters1][numbers1][numbers2]` will be replaced by a code generated for the recipient of the message, and it is important to keep these tags next to each other in that order.

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

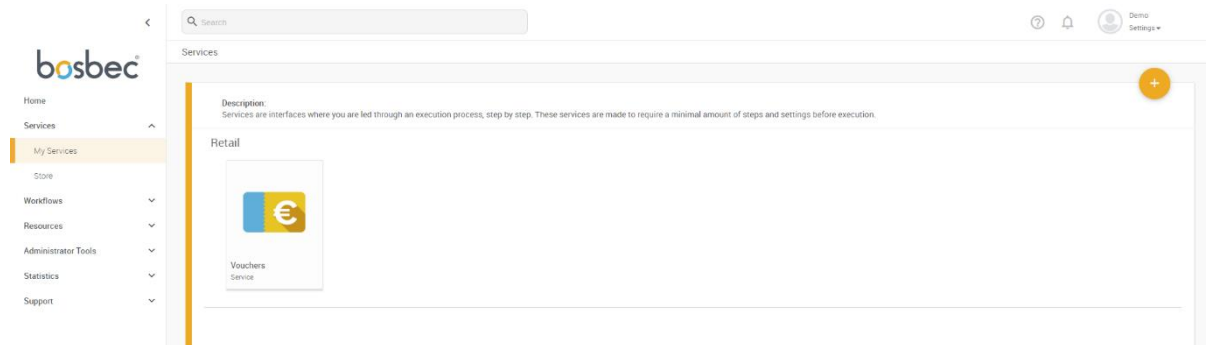


Image 5: My services

This is where you will find all your installed services. Click on **Vouchers**.

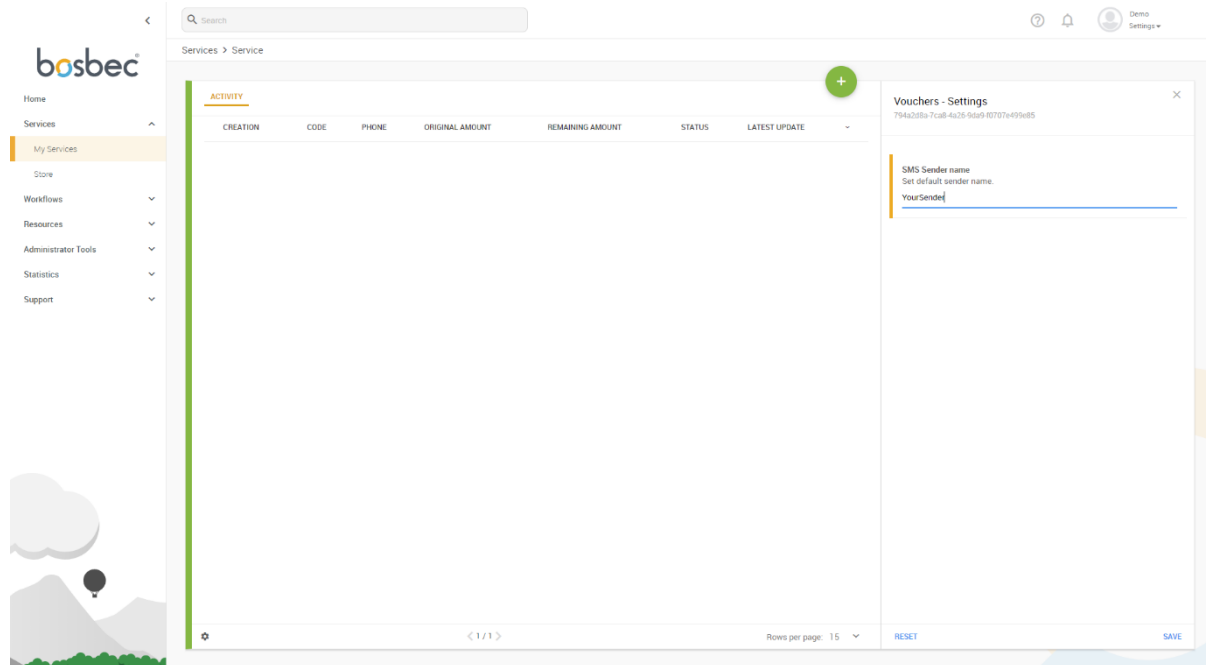


Image 6: The service view with the settings panel opened

This is the service view and from where you will manage your vouchers. 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.

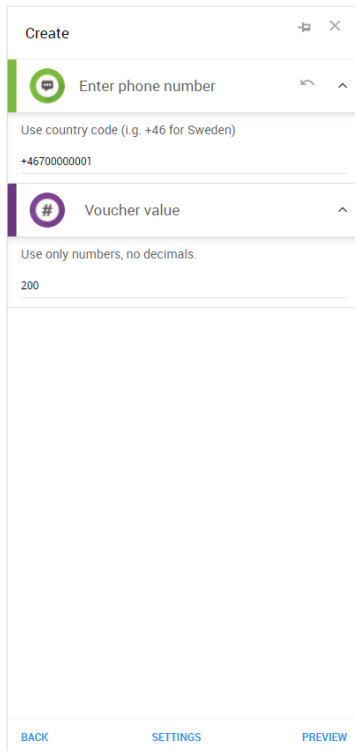
You are now ready to start using the service!

How to use

This section provides you with instructions of how to use the service “Vouchers”.

Create a voucher

Go to your service by clicking on the Voucher card in **My Services**. Click on the green plus icon in the top right corner to expand the action navigation bar. Select “Create”.



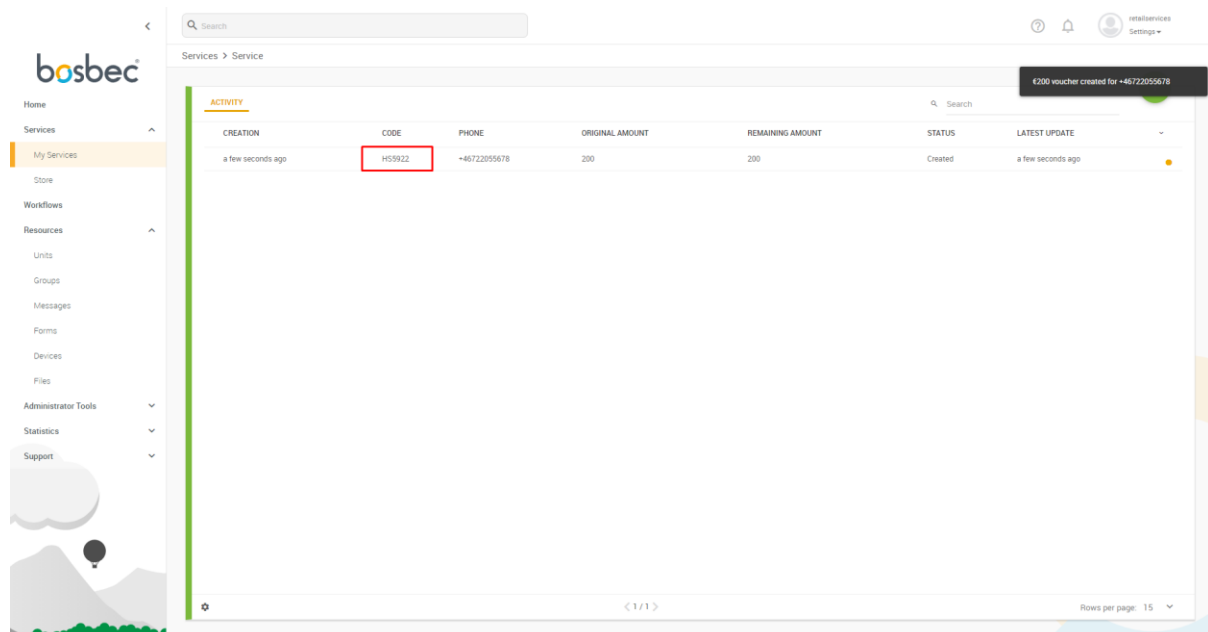
You can either choose an existing customer on your account, this will open a searchable list of all available customers. You can also add new customers by entering a phone number.

Add a voucher value, the amount of money the voucher should represent.

When you are done with your settings for the voucher, click “PREVIEW” in the bottom right corner, then click “RUN”.

Executing this action will update the service dashboard, your interface will be notified, and a SMS message is sent to the customer with the same information displayed in the service dashboard.

Image 7: Enter a pre-existing or new customer, click “PREVIEW” and “RUN”.



CREATION	CODE	PHONE	ORIGINAL AMOUNT	REMAINING AMOUNT	STATUS	LATEST UPDATE
a few seconds ago	H559Z2	+46722055678	200	200	Created	a few seconds ago

Image 8: An updated service dashboard with the voucher as a list item.

Image 9: Type in voucher code and usage amount.

Use a voucher

To use a voucher for a customer, click the same green plus icon and choose the second option “Use”.

Fill in the code provided by your customer and how much to use in the purchase. Select “PREVIEW” and “RUN”.

This will update the voucher list item in your dashboard, with a new “Remaining amount” value.

Image 10: Type either a voucher code or a phone number for the customer.

Verify a voucher

To verify a voucher, select the third option in the action list, “Verify”. Type either a voucher code or a phone number for the customer.

This will add a notification banner in your top right corner of the interface. Either the code is “valid” or “invalid”.

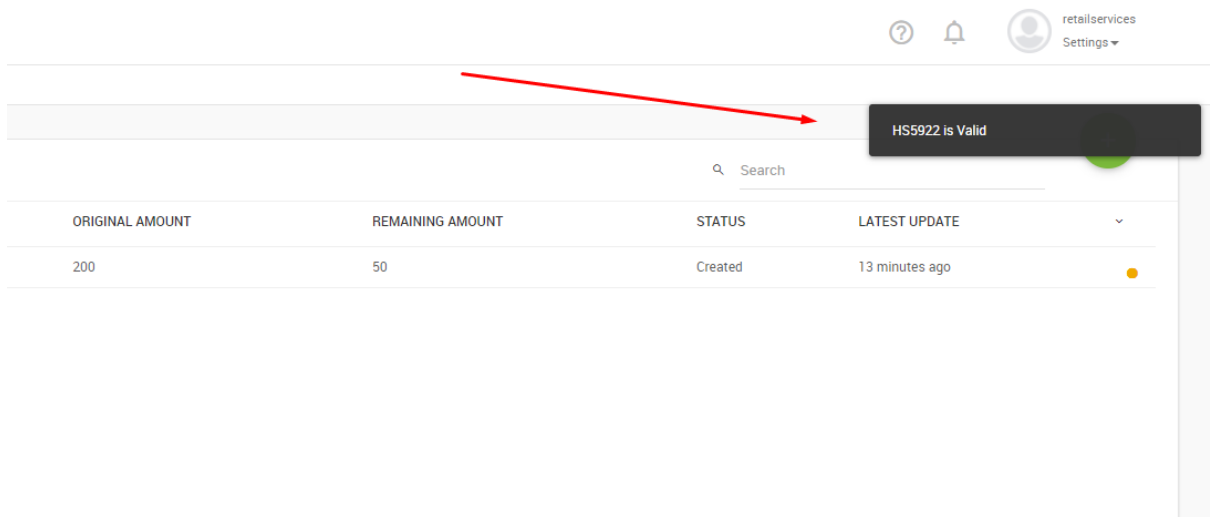


Image 11: Notification banner in the top right corner of the interface.

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/>.