

# How-To Guide Configuring Vouchers

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# Introduction

The purpose of this guide is to provide a foundational understanding of the options and capabilities of Vouchers. The use of Vouchers provides the retailer a flexible method to issue, track and control the redemption of credits, discounts and promotions.

## Overview

The following concepts will be used to configure Vouchers:

- Voucher Type Configuration
- Product Configuration
- Tender Configuration
- Promotion Configuration
- Voucher Serial Number Maintenance

# Prerequisites

## Resources

Before starting, you should have the following resources in place:

- Enactor Estate Manager
- Enactor POS (configured within the UK Region, connected to the Estate Manager)
- Standard Configuration, including:
  - Base Configuration
  - UK Retail (I have used UK in this example, but it could be other regional config packs.)
- Regionally appropriate data including Product, Localisation, Tenders, etc.

## Prior Training/Experience

You should be familiar with the following:

- Estate Manager configuration
- Enactor configuration concepts, including Locations, POS Terminals, Products, Promotions, Tenders, Discounts etc.
- Data broadcasting
- Standard POS Sales processes

# Voucher Fundamentals

## Understanding Vouchers

A Voucher is a flexible means of providing some form of benefit to a customer. A Voucher can be generated at POS or in an external system. When redeemed, a Voucher can be used as a tender, to apply a discount or to trigger a promotion. Vouchers have the capability of being serialised allowing them to be tracked and managed.

## Issuing Vouchers

A Voucher can be produced at POS as a Promotion Reward or it can be 'sold' as an item when associated with a Voucher Issue Product. When a Voucher is produced at POS it can be printed as part of the receipt. Vouchers can also be generated by external systems and distributed in various physical or digital formats. Externally created vouchers can be redeemed immediately or require activation at POS before they can be redeemed.

## Redeeming Vouchers

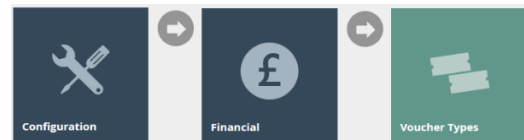
A Voucher can be configured to be used as a tender, to apply a discount or to trigger a promotion when redeemed. Depending on the Voucher configuration and retailer preferences, redemption can be initiated by selecting the Voucher Type from a list, selecting Vouchers associated with a customer, or scanning/entering a serial number. If a Voucher Type is Tracked, the number of times each Voucher is permitted to be redeemed can be specified.

# Configuration

## Voucher Type

Enactor supports numerous ways and options for configuring Voucher Types. This guide will focus on the core concepts and most common options used when configuring Voucher Types. For a detailed explanation of all available options, please refer to the full Enactor Application Configuration book.

Access Voucher Types using the Voucher Types option, obtained via the selection sequence shown at right, starting from the Main Menu:



**Voucher Type Maintenance**

Voucher Type ID:  Starts With:

Region:

Disabled:

	Voucher Type ID	Region	Description	Disabled
	CN-UK	United Kingdom	Credit Note	<input type="checkbox"/>
	CN_CA	Canada	Credit Note CA	<input type="checkbox"/>
	CN_US	United States	Credit Note US	<input type="checkbox"/>
	LOY_REG_US	United States	Earn Triple Points	<input type="checkbox"/>
	LOY_REG_CA	Canada	Earn Triple Points	<input type="checkbox"/>
	LOY_REG	All Regions	Earn Triple Points	<input type="checkbox"/>
	GV_CA	Canada	Gift Voucher CA	<input type="checkbox"/>
	UK-GV	United Kingdom	Gift Voucher UK	<input type="checkbox"/>
	GV_US	United States	Gift Voucher US	<input type="checkbox"/>
	MFC_CA	Canada	Manufacturer Coupon CA	<input type="checkbox"/>

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On the Voucher Type Maintenance page, select “Create a new Voucher Type”.

**Voucher Type Maintenance**

Please enter following details for the new Voucher Type

Region:

Voucher Type ID:

If the Voucher Type is being created for a specific Region, select it from the list. Otherwise, it can be left as “All Regions”. Each Voucher Type must have a unique Voucher Type ID per Region.

Multiple Tabs are displayed in Voucher Type Maintenance. Additional Tabs may be displayed based on options selected.

The screenshot displays the 'Voucher Type Maintenance' window. At the top, there is a green header bar with the title 'Voucher Type Maintenance' and window control icons. Below the header, a status bar indicates 'You are editing Voucher Type ID: 'VOUCHER01' for Region: 'All Regions''. The main content area features four tabs: 'General', 'Validation', 'Redemption', and 'Sub Type'. The 'General' tab is active, showing a form with the following fields: 'Description\*' (a text input field with a red asterisk indicating it is mandatory), 'Long Description' (a text input field), 'Disabled' (a checkbox), 'Allow Return' (a checkbox), 'Allow Issue' (a checkbox), 'Allow Tender' (a checkbox), 'Manufacturer Coupon' (a checkbox), 'Applies Discount' (a checkbox), 'Currency' (a dropdown menu currently set to 'Pounds Sterling'), and 'Voucher Image' (a dropdown menu currently set to '-'). At the bottom of the form, there is an 'Edit Image' button with a small icon. A red asterisk at the bottom left of the form indicates that fields marked with an asterisk are mandatory.

On the General tab, a Description is required for the Voucher Type. This is the Description that will be shown on the operator display and receipt when the Voucher is issued or redeemed. A Long Description field is also provided for reference.

There are 3 key aspects to the configuration of Voucher Types: Issuance, Validation and Redemption. Each of these aspects have numerous options which are independent of each other which results in numerous variations when combined together. Given the number of variations and potential complexity, this guide will cover each aspect individually.

## Issuance

If the Voucher Type is to be issued by POS, there are several settings to control the behaviour at issuance.

The screenshot shows the 'Voucher Type Maintenance' window. At the top, there's a title bar with a green header 'Voucher Type Maintenance' and window controls. Below the title bar, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing Voucher Type ID: 'VOUCHER01' for Region: 'All Regions''. The form has five tabs: 'General', 'Validation', 'Issue', 'Redemption', and 'Sub Type'. The 'General' tab is active. It contains the following fields and controls:

- Description\***: A text field with 'Test Voucher' and a language dropdown menu set to 'English (UK)'.
- Long Description**: A text field with a language dropdown menu set to 'English (UK)'.
- Disabled**: A checkbox, currently unchecked.
- Allow Return**: A checkbox, currently unchecked.
- Allow Issue**: A checkbox, currently checked (indicated by a blue square).
- Allow Tender**: A checkbox, currently unchecked.
- Manufacturer Coupon**: A checkbox, currently unchecked.
- Applies Discount**: A checkbox, currently unchecked.
- Currency**: A dropdown menu set to 'Pounds Sterling'.
- Voucher Image**: A dropdown menu set to '-'.
- Edit Image**: A button with an upload icon and the text 'Edit Image'.

At the bottom left, there is a red asterisk note: '\* Denotes Mandatory'.

On the General tab, select the Allow Issue option if the Voucher is to be issued by POS. Once the option has been selected, the Issue tab will be visible. If a marketing Image will be used to represent the Voucher, select it from the Voucher Image list. If the Image has not been previously uploaded to the system, select Edit Image which will step through the process to upload an Image as is done with Product Images and other Media.

Voucher Type Maintenance
? || x

Save Cancel

You are editing Voucher Type ID: 'VOUCHER01' for Region: 'All Regions'

General Validation Issue Redemption Sub Type

Voucher Value

Prompt for Value

☐

Saleable

☐

Printed

☐

Print Style

-

Endorse

☐

Endorsement Style

-

Open Drawer

☐

Expiry Period

0

Tender For Issue

-

When configuring the Issuance options for a Voucher, it is important to first understand how the Voucher will be obtained. A Voucher can be issued as a reward in a Promotion. A Voucher can also be sold in a transaction or manually issued by the cashier. If the Voucher is to be sold or added to a transaction, it must be marked as Saleable by selecting the option. If a Voucher has been marked as Saleable, it is possible to designate a Voucher Value or select the Prompt for Value option. The Value will not only be the default redemption value of the Voucher but will also be the amount charged for the Voucher at Issuance. By specifying or prompting for a Value, it is presumed that the Voucher will be treated as a Tender. When a Voucher is being sold in a transaction, it is possible to include its presence as part of a Promotion Item Set. This is accomplished by associating a Voucher Issue Product with the Voucher Type and is described in the following section.

If POS is to print the Voucher as a component of the receipt, the Printed option should be selected. Once the Printed option is selected, the Print Style should be selected from the choices in the dropdown.

The Expiry Period allows the retailer to specify an expiration point for the Voucher expressed in the number of days after issue. If expiration is desired on a specific date, that is controlled at the Redemption level and will be discussed later.



## Voucher Issue Product

When a Voucher Type is being issued by POS, it may be desirable to have it behave as an item in the basket. This is often done to allow the Voucher to be included from a Promotion evaluation standpoint. Refer to the guide on Product Setup for basic information on and navigation to the Product Maintenance Application.

The screenshot shows the 'Product Maintenance' application window. At the top, there's a green header bar with the title 'Product Maintenance' and window controls. Below the header, there's a toolbar with 'Save' and 'Cancel' buttons. A status bar indicates 'You are editing Voucher Issue Product V00001 :'. The main content area has a tabbed interface with 'General', 'Voucher', 'Attributes', and 'Product Media' tabs. The 'General' tab is active, showing a sub-tabbed interface with 'General', 'Product Group', 'Selling Codes', and 'Product Lists' sub-tabs. The 'General' sub-tab is active, displaying various product details: 'Product Description\*' with the value 'Test Voucher' and a language dropdown set to 'English (UK)'; 'Product Long Description' with a large text area and a language dropdown set to 'English (UK)'; 'Product Long Description URL' with an empty text field; 'Product External Reference' with an empty text field; 'Fascia' with a dropdown menu; 'Sale Start Date' and 'Sale End Date' with date pickers; 'Product Status' with a dropdown set to 'Live'; 'Fiscal Product Reference' with an empty text field; and 'Template' with an empty text field and a 'Change Template' link. A red asterisk note at the bottom left states '\* Denotes Mandatory'.

The Voucher Issue Product contains a subset of the tabs present when performing merchandise product setup. As these have been covered in the Product Setup guide, they will not be repeated here. The only tab that is unique to the Voucher Issue Product maintenance view is Voucher.

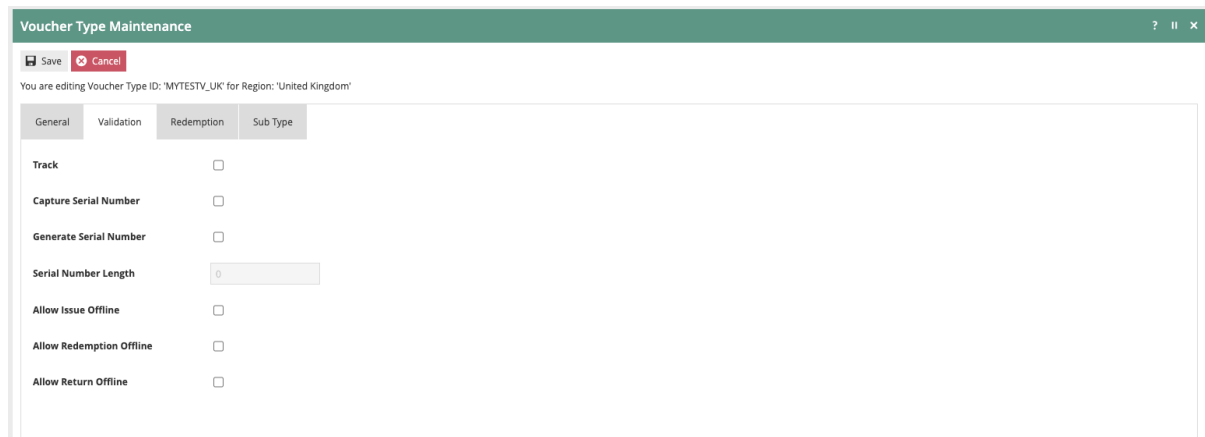
The screenshot shows the 'Product Maintenance' application window, specifically the 'Voucher' tab. The header and toolbar are the same as in the previous screenshot. The status bar now indicates 'You are editing Voucher Issue Product V00001 : Test Voucher.'. The 'Voucher' tab is active, showing 'Voucher Type\*' with a dropdown menu set to 'Gift Voucher UK' and 'Voucher Denomination' with a dropdown menu. A red asterisk note at the bottom left states '\* Denotes Mandatory'.

Select the Voucher Type from the dropdown that is to be issued when this Product is sold in a completed transaction.

## Validation

Voucher Types have the ability to support a unique serial number for each Voucher issued. Because every Voucher can be unique, their issuance and use can be tracked and managed making them ideal to be used with high-value rewards.

Regardless of any settings selected on the General tab, the Validation tab will always be available in the Voucher Type Maintenance screen.



The screenshot shows the 'Voucher Type Maintenance' window with the 'Validation' tab selected. The window title is 'Voucher Type Maintenance' and it includes 'Save' and 'Cancel' buttons. A message states: 'You are editing Voucher Type ID: 'MYTESTV\_UK' for Region: 'United Kingdom''. The 'Validation' tab contains the following settings:

Setting	Value
Track	<input type="checkbox"/>
Capture Serial Number	<input type="checkbox"/>
Generate Serial Number	<input type="checkbox"/>
Serial Number Length	0
Allow Issue Offline	<input type="checkbox"/>
Allow Redemption Offline	<input type="checkbox"/>
Allow Return Offline	<input type="checkbox"/>

Enactor has the ability to Validate a Voucher, by serial number, against a list of known Vouchers. If it is desired for Enactor to manage Validation, the Track option should be selected.

Populating Enactor with the Voucher serial numbers can be accomplished in different ways depending on how the Voucher is being produced. If the Voucher is not being issued by POS and contains a pre-assigned serial number, the Capture Serial Number option should be selected. This will prompt the cashier to scan the serial number on the physical voucher at the time it is issued. If POS is Issuing the Voucher, select the Generate Serial Number option which will result in a serial number being assigned at the time of issuance.

Voucher Validation relies on communications with Estate Manager at the time of Issuance and at Redemption. The Validation tab includes options on how these transactions should behave in the event that communications to the Estate Manager has been disrupted.

Tracking Vouchers by serial number as described is a prerequisite to being able to manage and control Redemption. The process to impose limits on Redemptions is covered in the next section.

## Redemptions

As mentioned previously, a Voucher Type can be configured to provide many different types of benefits: it can act as a tender, it can apply a discount, or it can be used to trigger a promotion. Regardless of the type of benefit received, there are a number of common settings found on the Redemption tab.

The screenshot displays the 'Voucher Type Maintenance' window. At the top, there are 'Save' and 'Cancel' buttons. Below them, a message states: 'You are editing Voucher Type ID: 'MYTESTV\_UK' for Region: 'United Kingdom''. The interface features a tabbed menu with 'General', 'Validation', 'Redemption', and 'Sub Type'. The 'Redemption' tab is active, showing a sub-menu with 'General', 'Included Product', 'Excluded Product', 'Included MMGroup', 'Excluded MMGroup', 'Included Channels', 'Excluded Channels', and 'Overlap'. The 'General' sub-tab is selected, revealing the following fields: 'Expiry Date' (a date picker), 'Minimum Spend' (a text field with '£0.00' and a note '(Zero means unlimited)'), 'Item Price Above' (a text field with '£0.00' and a note '(Zero means unlimited)'), 'Item Price Below' (a text field with '£0.00' and a note '(Zero means unlimited)'), 'Mark Items Used' (a checkbox), 'Usage Limit' (a text field with '0'), 'Update Usage' (a checkbox), and 'Allow Multi Use in One Transaction' (a checkbox).

The Redemption tab and sub tabs allow a significant amount of control over the applicability of the Voucher. Many of the concepts applied are consistent with those seen in the Promotion Configuration guide.

On the Redemption – General tab an Expiry Date can be specified for the benefit. As best practice, the Expiry Date should not be used if an Expiry Period has been specified on the Issue tab.

Using the Minimum Spend Field, it is possible to establish a minimum transaction value that must be achieved before the Voucher can be redeemed. Additionally, the Item Price Above and Below options allow eligible items to be specified by their minimum or maximum prices. If the Mark Items Used is selected, items in the transaction will be marked as used if a voucher is applied against them. This will affect their ability to receive other discounts or promotions depending on configuration.

The Usage Limit field represents the number of times a Voucher can be redeemed. A usage limit of 0 indicates that it may be redeemed an unlimited number of times. The Update Usage option should be selected if the Voucher serial numbers and usage limits are being managed within Enactor. An additional option is provided to Allow Multi Use in One Transaction. Assuming a Voucher has a Usage Limit higher than 1, this option would permit multiple uses within a single transaction up to the Usage Limit.

The Redemption – Included and Excluded tabs as well as the Redemption – Included and Excluded MMGroup tabs mirror those found in Item Set configuration in Promotion Maintenance. Please refer to the Promotions Configuration guide if additional information is required.

Voucher Type Maintenance
? || x

Save Cancel

You are editing Voucher Type ID: 'MYTESTV\_UK' for Region: 'United Kingdom'

General Validation Redemption Sub Type

General Included Product Excluded Product Included MMGroup Excluded MMGroup Included Channels Excluded Channels Overlap

Allow Overlap With

	Voucher types
-	-
+ Add	<input checked="" type="checkbox"/> Credit Note <input type="checkbox"/> Test Voucher- uk <input type="checkbox"/> Gift Voucher UK <input type="checkbox"/> £10 Pound off <input type="checkbox"/> Earn Triple Points <input type="checkbox"/> Promo V

By default, Vouchers are not permitted Overlap. The Redemption – Overlap tab provides a mechanism to allow Overlap on a Voucher-by-Voucher basis. To permit Overlap with a Voucher, select the desired voucher from the dropdown and click 'Add'. Multiple Vouchers can be selected to allow Overlap.

Additional configuration options will be present on the Redemption – General tab based on the type of benefit being provided by the Voucher. The following sections provide the additional Redemption configuration required based on benefit type.

## Redemption as a Tender

A Voucher Type can be configured so that it acts like a tender. Many of the configuration options discussed will be dictated by the retailer's accounting practices more so than functionality.

The screenshot shows the 'Voucher Type Maintenance' window for 'MYTESTV\_UK' in the 'United Kingdom' region. The 'General' tab is active. The 'Allow Tender' checkbox is checked. Other options like 'Disabled', 'Allow Return', 'Allow Issue', 'Manufacturer Coupon', and 'Applies Discount' are unchecked. The 'Description' is 'Test Voucher- UK' and the 'Currency' is 'Pounds Sterling'.

Field	Value
Description*	Test Voucher- UK
Long Description	
Disabled	<input type="checkbox"/>
Allow Return	<input type="checkbox"/>
Allow Issue	<input type="checkbox"/>
Allow Tender	<input checked="" type="checkbox"/>
Manufacturer Coupon	<input type="checkbox"/>
Applies Discount	<input type="checkbox"/>
Currency	Pounds Sterling
Voucher Image	-
Edit Image	<a href="#">Edit Image</a>

If a Voucher Type is to be treated as a tender at Redemption, the Allow Tender option on the General tab must be selected. Once this option is selected, the Tender tab will become visible and Tender-specific options will be added to the Redemption – General tab.

The screenshot shows the 'Voucher Type Maintenance' window for 'MYTESTV\_UK' in the 'United Kingdom' region. The 'Tender' tab is active. The 'Frank On Redemption' checkbox is unchecked. The 'Frank Style' is 'Voucher Frank' and the 'Value Type' is '-'. The 'Denomination' sub-tab is also visible.

Field	Value
Frank On Redemption	<input type="checkbox"/>
Frank Style	Voucher Frank
Value Type	-

When a Voucher is being used as a tender it may be desirable to Frank the document at the time of redemption to mark that it has been used or to add to the usage history in the case of a Voucher that is permitted to be used multiple times. The option to Frank the Voucher at Redemption is provided on the Tender – General tab.

Voucher Type Maintenance
? || x

Save
Cancel

You are editing Voucher Type ID: 'MYTESTV\_UK' for Region: 'United Kingdom'

General
Validation
Tender
Redemption
Sub Type

General
Included Product
Excluded Product
Included MMGroup
Excluded MMGroup
Included Channels
Excluded Channels
Overlap

Tender for Redemption

Gift Voucher (United Kingdom)

Tender Value

£0.00

Expiry Date

Minimum Spend

£0.00

(Zero means unlimited)

Item Price Above

£0.00

(Zero means unlimited)

Item Price Below

£0.00

(Zero means unlimited)

Mark Items Used

☐

Usage Limit

1

Update Usage

☒

Allow Multi Use in One Transaction

☐

Once the Allow Tender option is selected on the General tab, additional options appear on the Redemption – General tab. The Tender for Redemption is selected from a dropdown list. A brief description regarding Tender configuration is available in the next section of the document. A field is also provided to specify a Tender Value for the Voucher Type.

It is important to note that, as discussed in the section on Issuance, that a Voucher Value may have been specified or the Prompt for Value option may have been enabled as part of Issuance. If the Issuance options for Value have been used, it is not necessary to specify a Tender Value on the Redemption – General tab. It is conceivable that both a Voucher Value and a different (higher) Tender Value could be specified for the same Voucher. This would create a condition where it would be possible to sell a Voucher at a discount compared to its Tender Value (i.e., purchase a £50 Voucher for £35).

## Tender Types

Configuring a Tender Type to support Vouchers follows the same process as setting up any other Tender Type. Refer to the configuration guide on Tenders for navigation to and basic operation of the Tender Maintenance application.

The screenshot displays the 'Tender Maintenance' application interface. At the top, there is a header bar with the title 'Tender Maintenance' and standard window controls. Below the header, a status bar indicates 'You are editing Tender ID 'GV\_UK' for Region 'United Kingdom''. The main content area features a tabbed interface with the following tabs: General, Restrictions 1, Restrictions 2, Discount Restrictions, Overlap Tenders, User Limits, Cash Management, Change, and Attributes. The 'General' tab is currently selected. The form contains the following fields and controls:

- Description\***: A text field containing 'Gift Voucher UK' and a dropdown menu set to 'English (UK)'.
- Currency\***: A dropdown menu set to 'Pounds Sterling'.
- Maximum Tenders Per Transaction**: A text input field with the value '0' and a note '(Zero means unlimited)'.
- Open Drawer**: A checkbox, currently unchecked.
- Open Drawer At End**: A checkbox, currently checked.
- Capture Name And Address For Tender**: A checkbox, currently unchecked.
- Capture Name And Address For Credit**: A checkbox, currently unchecked.
- Prompt For Reference Number**: A checkbox, currently unchecked.
- Print Reference Number on Receipt**: A checkbox, currently unchecked.
- Reference Number Validator**: A dropdown menu set to '-'.
- Frank Tender**: A checkbox, currently unchecked.
- Tender Frank Message Set**: A text input field.
- Tender Prompt Message Set**: A text input field.
- Additional Receipts**: A text input field with the value '0'.
- Fiscal Tender Id**: A text input field.
- Fiscal Tender Type**: A text input field.

A red asterisk (\*) denotes mandatory fields.

There are no special tabs or settings presented when configuring a Tender Type of Voucher. There are some settings that should receive special attention in the context of a Voucher Tender Type.

Tender Maintenance

SaveCancel

You are editing Tender ID 'GV\_UK' for Region 'United Kingdom'

GeneralRestrictions 1Restrictions 2Discount RestrictionsOverlap TendersUser LimitsCash ManagementChangeAttributes

Debits Allowed

☒

Debit Tendering Restrictions

Amount less than or equal balance

Debit Limit

£0.00

(Zero means unlimited)

Aggregate Debit Limits

☐

Minimum Debit Amount

£0.00

Credits Allowed

☐

Credit Tendering Restrictions

None

Credit Limit

£0.00

(Zero means unlimited)

Aggregate Credit Limits

☐

Minimum Credit Amount

£0.00

Force Amount Entered

☐

Prompt With Amount Due

☒

Force Use Amount Due

☐

Minimum Transaction Value

£0.00

Transaction Tender Limit Check

☐

Enable Promotion Check in Tendering

☐

Conversion Rounding Rule (from base currency)

-

On the General tab, one of the Open Drawer options should be selected if the Vouchers are to be collected and reconciled as part of Cash Management. On the Restrictions 1 tab, the Debit Tendering Restrictions should be considered if there is need to minimize the need to provide Change associated with an overtender. The Credits Allowed option should be consistent with any return privileges afforded to the Voucher Type.



Tender Maintenance

Save

Cancel

You are editing Tender ID 'GV\_UK' for Region 'United Kingdom'

General

Restrictions 1

Restrictions 2

Discount Restrictions

Overlap Tenders

User Limits

Cash Management

Change

Attributes

Banking Tender

Auto Banked

Include In Safe Limit Check

Cashup Tender

Currency Purchase Tender

Float Tender

Pickup Tender

Auto Picked Up

Spot Check Tender

Enter By Quantity

Enter By Denomination

Allow Negative Cashup Value?

Tracked Item

Tracked ID Type

Free Text

Safe Discrepancy Threshold

£0.00

(Zero means unlimited)

Terminal Discrepancy Threshold

£0.00

(Zero means unlimited)

Maximum Amount

£0.00

(Zero means unlimited)

The Cash Management tab contains the settings necessary to process the Vouchers as part of the cash reconciliation process. Some retailers will choose to handle and reconcile Vouchers as if they are a physical currency while others will choose to treat them as if they are an electronic form of payment and allow the system to manage the process.

Tender Maintenance

Save

Cancel

You are editing Tender ID 'GV\_UK' for Region 'United Kingdom'

General

Restrictions 1

Restrictions 2

Discount Restrictions

Overlap Tenders

User Limits

Cash Management

Change

Attributes

Assign Change to Over Payment

☐

Over Payment Reason Code

-

Change Tender

Cash UK (United Kingdom)

Change Limit

£0.00

(Zero means unlimited)

Change Minimum Limit

£0.00

Secondary Change Tender

-

Secondary Change Limit

£0.00

(Zero means unlimited)

Secondary Change Minimum Limit

£0.00

Credit Change Tender

-

Credit Change Limit

£0.00

(Zero means unlimited)

When treating a Voucher as a tender, the retailer will also need to consider the possibility of needing to provide change in a transaction using a Voucher as a tender. The Tender that is to be used for Change, along with associated limits, is selected on the Change tab.

## Redemption as a Discount

A Voucher can be used to apply a Discount. When a Voucher is used to apply a discount, it leverages Reasons to manage the rules associated with the Discount.

The screenshot displays the 'Voucher Type Maintenance' window. At the top, there are 'Save' and 'Cancel' buttons. Below them, a message states: 'You are editing Voucher Type ID: 'MYTESTV\_UK' for Region: 'United Kingdom''. The interface features five tabs: 'General', 'Validation', 'Issue', 'Redemption', and 'Sub Type'. The 'General' tab is active, showing the following fields:

- Description\***: A text field containing 'Test Voucher- uk' and a language dropdown menu set to 'English (UK)'.
- Long Description**: A text field and a language dropdown menu set to 'English (UK)'.
- Disabled**: A checkbox, currently unchecked.
- Allow Return**: A checkbox, currently unchecked.
- Allow Issue**: A checkbox, currently checked.
- Allow Tender**: A checkbox, currently unchecked.
- Manufacturer Coupon**: A checkbox, currently unchecked.
- Applies Discount**: A checkbox, currently checked.
- Currency**: A dropdown menu set to 'Pounds Sterling'.
- Voucher Image**: A dropdown menu set to 'Test Voucher'.
- Edit Image**: A button with an upload icon and the text 'Edit Image'.

A red asterisk at the bottom left indicates that fields marked with an asterisk are mandatory.

To configure a Voucher Type to apply a discount, select the Applies Discount option on the General tab. Using a Voucher Type to apply a discount does not result in any additional settings or options related to Validation or Issuance. Please note, there are settings on the Issue tab that presume use as a tender including Voucher Value, Prompt for Value and Tender for Issue. These fields should not be used when configuring a Voucher Type to apply a discount.

**Voucher Type Maintenance** ? || ×

Save Cancel

You are editing Voucher Type ID: 'MYTESTV\_UK' for Region: 'United Kingdom'

General Validation Issue Redemption Sub Type

General Included Product Excluded Product Included MMGroup Excluded MMGroup Included Channels Excluded Channels Overlap

Expiry Date

Minimum Spend  (Zero means unlimited)

Item Price Above  (Zero means unlimited)

Item Price Below  (Zero means unlimited)

Mark Items Used ☐

Usage Limit

Update Usage ☒

Allow Multi Use in One Transaction ☐

Reward Type

Discount Reason

On the Redemption tab, there are 2 additional fields available to configure the Discount Reward. To apply a discount upon redemption, select the Discount Reward type from the dropdown. The Discount Reason selector will be prepopulated with all of the defined Transaction Discount Reasons. If a pre-existing Discount is not appropriate, a new Discount Reason can be configured in the Reason Maintenance application.

If a Voucher is being used to trigger a Promotion then the Reward Type should be set to Promotion and the Discount Reason field should be left blank. Additionally, no further restrictions should be configured on the Redemption tab. All restrictions should be configured within the promotion itself.

### Promotion Setup

When using a Voucher to trigger a Promotion, all of the key concepts related to Promotion configuration remain the same. For more information, please refer to the Promotion configuration guide.

**Promotion Maintenance** ? || ×

Save Cancel

You are editing Promotion '4' for Region 'United Kingdom'.

General Item Sets Transaction Timetable Customers Employees Tenders Vouchers Regions Fascias Locations

This is the list of vouchers required to trigger the promotion:

	ID	Description
-	-	-
<span>+</span> Add Voucher	<input type="text" value="Test Voucher- uk"/>	

Once a promotion has been setup, select the Vouchers tab. From the dropdown list, select the desired Voucher(s) and click 'Add Voucher'. The selected Voucher(s) will now be a condition to qualify for the Reward.

## Voucher Sub Type

Through the Sub Type tab, it is possible to group together Vouchers to use a common set of General, Validation, Issue and Redemption Type characteristics. Each Sub Type can support a unique set of Redemption settings but must be of the same Redemption Type as the parent Voucher.

The screenshot shows the 'Voucher Type Maintenance' window with the 'Sub Type' tab selected. The window title is 'Voucher Type Maintenance'. Below the title bar, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing Voucher Type ID: 'MYTESTV\_UK' for Region: 'United Kingdom''. The 'Sub Types' section contains a table with columns 'Sub Type ID' and 'Description'. The table has one row with a hyphen '-' in both columns. Below the table is an 'Add' button.

Sub Type ID	Description
-	-

To create a Voucher Sub Type, navigate to the Sub Type tab, enter a Voucher Sub Type ID and click 'Add'.

The screenshot shows the 'Voucher Type Maintenance' window with the 'General' tab selected for a new Sub Type. The window title is 'Voucher Type Maintenance'. Below the title bar, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing Sub Type ID: 'SUBVOUCH1' for Voucher Type ID: 'MYTESTV\_UK' for Region: 'United Kingdom''. The 'General' tab is active, showing fields for 'Description\*', 'Tender for Redemption', 'Tender Value', 'Expiry Date', 'Minimum Spend', 'Item Price Above', 'Item Price Below', and 'Mark Items Used'. The 'Description\*' field is empty, and the 'Tender for Redemption' dropdown is set to '-'. The 'Tender Value' field is set to '£0.00'. The 'Expiry Date' field is empty. The 'Minimum Spend' field is set to '£0.00'. The 'Item Price Above' field is set to '£0.00'. The 'Item Price Below' field is set to '£0.00'. The 'Mark Items Used' checkbox is unchecked. A red asterisk indicates that 'Description\*' is mandatory.

\* Denotes Mandatory

Once the Voucher Sub Type has been added, a Description for the new Voucher Sub Type is required on the General tab along with the expected settings for the reward type similar to what is found on the Redemption tabs. The image above is for a Sub Type being created against a parent Voucher Type that is set as a Tender.

Voucher Type Maintenance

Save

Cancel

You are editing Sub Type ID: 'SUBVOUCH1' for Voucher Type ID: 'MYTESTV\_UK' for Region: 'United Kingdom'

General

Included Product

Excluded Product

Included MMGroup

Excluded MMGroup

Overlap

Description\*

English (UK)

Expiry Date

Minimum Spend

£0.00

Item Price Above

£0.00

Item Price Below

£0.00

Mark Items Used

☐

Reward Type

None

Discount Reason

-

\* Denotes Mandatory

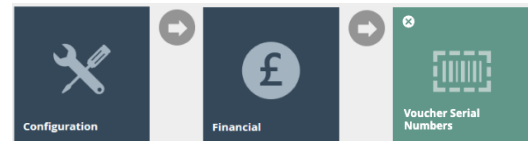
The image above is for a Sub Type being created against a parent Voucher Type that is set as a Discount.

Once Sub Types have been created, they will inherit any changes made to the parent Voucher Type settings. A Voucher Sub Type cannot be separated from the parent without deletion and recreation as its own Voucher Type.

## Voucher Serial Number Maintenance

While not specifically required as part of Voucher Type configuration, a brief review of Voucher Serial Number Maintenance is appropriate.

Access Voucher Types using the Voucher Types option, obtained via the selection sequence shown at right, starting from the Main Menu:



Voucher Serial Number Maintenance

Voucher Type

-

Serial Number































Starts With

Status

-

Apply Filters

Reset Filters

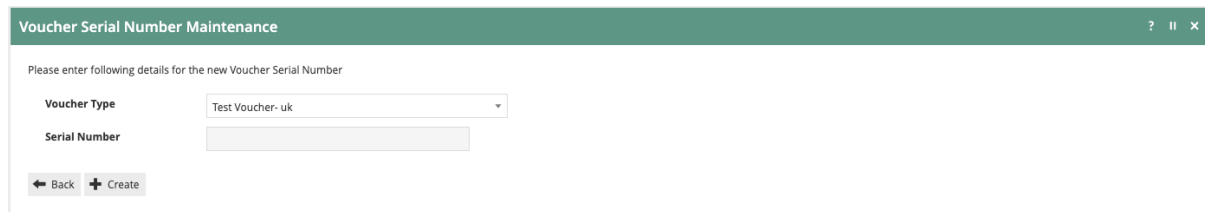
	Voucher Type	Serial Number	Status
  	MYTESTV	0101108210212202746018	Redeemed
  	MYTESTV	0101110210212202902039	Redeemed
  	Test Voucher- uk	0101113210212210014036	Issued
  	Test Voucher- uk	0101113210212210014037	Redeemed
  	Test Voucher- uk	0101113210212210014037	Redeemed
  	Test Voucher- uk	0101116210212211051056	Issued
  	Test Voucher- uk	0101117210212211451031	Issued
  	Test Voucher- uk	0101118210212215004024	Issued
  	Test Voucher- uk	0101119210215143914022	Issued
  	Test Voucher- uk	0101120210215145613026	Issued

Page 1 of 4

Page Size 10

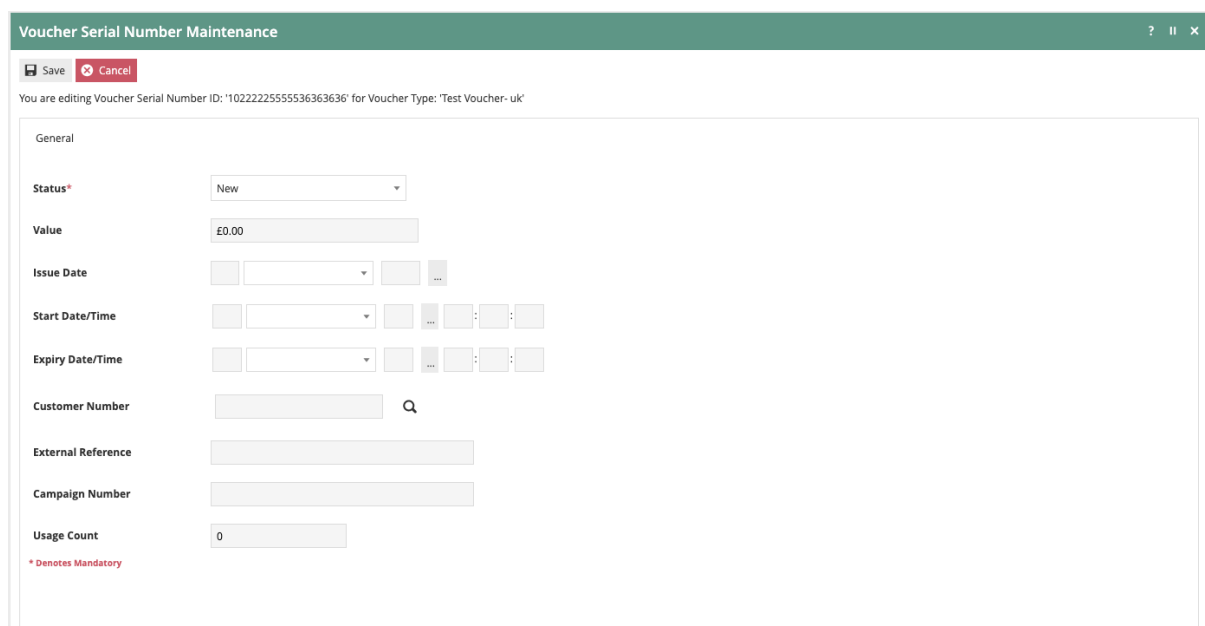
Create a new Voucher Serial Number

The Voucher Serial Number Maintenance shows a record of all Tracked Vouchers along with their Serial Numbers. A Voucher Serial Number can be added manually by clicking ‘Create a new Voucher Serial Number’.



The screenshot shows a web application window titled "Voucher Serial Number Maintenance". Below the title bar, there is a message: "Please enter following details for the new Voucher Serial Number". The form contains two fields: "Voucher Type" with a dropdown menu showing "Test Voucher- uk", and "Serial Number" with an empty text input field. At the bottom left, there are two buttons: "Back" with a left arrow icon and "Create" with a plus icon.

To create the Voucher Serial Number, select the Voucher Type from the dropdown list, enter the Serial Number and click ‘Create’.



The screenshot shows the same web application window, but now it is in "Edit" mode. At the top, there are "Save" and "Cancel" buttons. Below them, a message states: "You are editing Voucher Serial Number ID: '10222225555363636' for Voucher Type: 'Test Voucher- uk'". The form is divided into a "General" section. It contains several fields: "Status\*" with a dropdown menu showing "New"; "Value" with a text input field showing "£0.00"; "Issue Date" with a date picker; "Start Date/Time" with a date and time picker; "Expiry Date/Time" with a date and time picker; "Customer Number" with a text input field and a search icon; "External Reference" with a text input field; "Campaign Number" with a text input field; and "Usage Count" with a text input field showing "0". At the bottom left, there is a red asterisk followed by the text "\* Denotes Mandatory".

Once the Voucher Serial Number has been created, the Status of the Voucher Serial Number must be selected. A Status of Issued is required to support Redemption. Additional fields are available for configuration. If using the additional fields, be sure they are consistent with the Voucher Type selected.



Voucher Serial Number Maintenance

?

||

X

Save

Cancel

You are editing Voucher Serial Number ID: '0101124210215191801022' for Voucher Type: 'Saleable Voucher'

General

Status\*

Redeemed

▼

Value

£25.00

Issue Date

15

February

▼

2021

...

Start Date/Time

▼

...

:

:

Expiry Date/Time

▼

...

:

:

Customer Number

1

Q

External Reference

Campaign Number

Usage Count

1

\* Denotes Mandatory

The Voucher Serial Number Maintenance screen can also be used to view or modify the status of a previously issued Voucher Serial Number.

# About This Document

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The amendment history of this document can be found in the table below.

## Current Document Version information

### Document Context

This document is part of the Enactor Product Documentation Series. All Enactor products include a comprehensive documentation set designed to improve understanding of the product and facilitate ease of use.

### Document Inquiries

At Enactor we aspire to producing the highest quality documentation to reflect and enhance the quality of our product. If you find that the document is inaccurate or deficient in any way, please assist us in improving our standard by letting us know.

For matters of document quality or any other inquiries regarding this document please contact:

By Email: [documentation@enactor.co.uk](mailto:documentation@enactor.co.uk)

# Document History

The following versions of the document have been produced:

VERSION	STATUS	ISSUE DATE	AUTHOR	REASON FOR ISSUE
1.0	Initial Draft	17 Feb 2021	Michael Tolson	Initial Version