

BOOKSTORE VOUCHER USER GUIDE

A step-by-step guide for creating a voucher account and issuing a voucher in the online bookstore.

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SETTING UP A VOUCHER ACCOUNT

- A program or department on campus may need to issue students funds to students to use in the online bookstore.
- In order to do so, your Customer Success Manager will work with you to set up an account to access our Voucher Creation Tool.
- This tool will give users the ability to create and issue vouchers as well as reporting capabilities.
- The first step in this process is filling out the Voucher Account Authorization Form.

VOUCHER ACCOUNT AUTHORIZATION FORM

- This form will ask for information pertaining to the program or department you are requesting voucher creation access for.
- **Information we need:**
 - School name, agency (program/department) name, and the name of who is requesting the account be set up.
 - Billing information: Email for invoices to be sent to (this can be more than one email address,) phone number, address, and the name of the billing contact.
 - If there should be any restrictions set on the vouchers. (See step 3)
 - Tax exemption status. Will orders placed using these vouchers be tax exempt? If so, we will need your Tax Exempt form.
 - User information: Who will need access to the Voucher Creation Tool? These users will be able to log in, create, and issue voucher funds to students.
 - Signatures of the requester and authorized school representative.

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RESTRICTIONS WE CAN SET

- To ensure students are buying only what they are intended to, we are able to set restrictions on vouchers.
- **Available restrictions:**
 - No restrictions on voucher (the voucher can be used to purchase anything that is added to their cart.)
 - Vouchers can only be used to purchase adopted materials (this includes OPTIONAL material.)
 - Vouchers can only be used to purchase REQUIRED and adopted materials.
- If an order is attempted to be placed containing items that are not authorized to be paid for with the voucher, we will cancel it.

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Dear

The following item(s) were canceled from your order

- 9119909991966: Pearson+ Single Title Subscription, 4-Month Term by Pearson

Item(s) were excluded because of violation of the textbook voucher agreement guidelines. Students may use their voucher only for their APPROVED courses and associated course materials. funds may not be used for school supply items such as pens, notebooks, backpacks, or calculators.

Sincerely,
The Team at TextbookX

ACCESSING THE VOUCHER CREATION TOOL

- Once steps 1-3 are complete, your Customer Success Manager will issue all listed users a unique Login and Password to access the tool.
- Log in with your provided credentials at <https://tools.akademos.com/schools/vouchers.php>

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Voucher Tool Login

Please enter your voucher tool login information below

Username:	<input type="text" value="username"/>
Password:	<input type="password" value="....."/>
<input type="button" value="Log-In"/>	


CREATING A VOUCHER CODE

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- Once logged in, you will see 'Modify/Create Voucher Code.' Here is where you will enter in the below information.
 - **Your name**- The name of the person creating the voucher.
 - **Student Name** - The student's first and last name.
 - **Voucher Number**- This is an alphanumeric code that you create. This code can be up to 40 digits, but 7 is the minimum.
 - We recommend using a standard convention for creating codes.
 - For example: FA1234F23 might be FA (financial aid) for student ID 1234 for the Fall 23 term.
 - **Dollar Amount**- The total amount the student is allocated to use in the online bookstore. No '\$' is needed.
 - **Student Email Address**- An email will be sent to the email entered in this field with instructions on how to use the voucher. If the email address that is entered sent to us in the SIS system) the funds will automatically appear in the student's bookstore account. Make sure to check the notify student box, this will send the email out.
 - **Expiration Date**- Add a date for when you would like the voucher to expire.
 - **Vendor ID**- Leave blank unless you have been given a Vendor ID.
- Once all the fields have been filled out click on generate.

Create/Modify Voucher Code

Use the form below to create a new voucher by filling out all the fields.

Your Name:	<input type="text"/>
Student's Name:	<input type="text"/>
Voucher Number:	<input type="text"/>
Dollar Amount:	<input type="text"/>
Student Email Address:	<input type="text"/>
Notify Student:	<input type="checkbox"/>
Expiration Date (MM-DD-YYYY):	<input type="text"/> 
Voucher Agency/School:	<input type="text"/>
<input type="button" value="Generate"/>	

CREATING MORE THAN ONE VOUCHER AT A TIME

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- If you have a list of vouchers to enter, uploading is the fastest method.
- Scroll down to upload a list of vouchers and click on download a template, fill out this form and save to the computer.
- You can modify existing vouchers as well as create new ones through a single upload: if the voucher exists the old balance will be overwritten.
- Supplying an email address and entering "yes" in the "Notify Student" column will generate an email to the student containing the voucher number and the balance. Please note that "Student Email Address" and "Notify Student" are optional fields and may be left empty in your upload.
- Once the document is saved, select the browse button on the site, and select your file and click open, then click the upload button. Your vouchers will be uploaded to the site.

	A	B	C	D	E	F	G
1	Your Initials	Student's Name	Voucher Number	Dollar Amount	Student's Email Address	Notify Student	Expiration Date
2	JS	Franklin Smith	212341402	100			
3	JS	Amanda Jones	790293123	150	ajones@school.edu	yes	11-01-2019
4	AM	Doug Wheatly	198143432	250	dwheatly@school.edu		08-15-2019
5	AM	Karen Watts	131235134	500			
6	DS	Arnold Douglas	123163454	700	adouglas@school.edu	yes	08-15-2019

Upload Instructions

1. First, enter your voucher data into a spreadsheet program, like Microsoft Excel.
2. Next, click "Save As" from the file menu, and choose type "Tab Delimited" before saving.
3. Finally, click the "Browse" button below and locate the file you saved, then click "Upload".

[Download a template.](#)

Be sure to remove the example rows and save as a tab-delimited file as specified above before uploading.

No file chosen

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SEARCHING FOR A VOUCHER

- When searching for vouchers use the 'Search Voucher Codes' tool.
 - Remember to select the box next to each filter you wish to use.
- To see an overview of all created vouchers scroll to the bottom of the page and click on show all vouchers.
- You have the ability to export these files into Excel by using the "download results to Excel" link on the top right.

Search Voucher Codes

Check the box next to each filter you wish to use

Issue Date:	From 08-29-2023	To 08-29-2023	<input type="checkbox"/>
Usage Date:	From 08-29-2023	To 08-29-2023	<input type="checkbox"/>
Balance:	From 0	To 0	<input type="checkbox"/>
Student Name, ID or Email:	<input type="text"/>		<input type="checkbox"/>
Issuer's Initials:	<input type="text"/>		<input type="checkbox"/>
Sort By:	<input checked="" type="radio"/> Issue Date <input type="radio"/> Student Name <input type="radio"/> Voucher Number <input type="radio"/> Current Balance		
Expiration Date (MM-DD-YYYY):	From 08-29-2023	To 08-29-2023	<input type="checkbox"/>
<input type="button" value="Search"/>			



[Download Results to Excel](#)

*Current balance may reflect administrator changes to Voucher Number balance

Voucher Number	Student Name	Email	Issue Date	Expiration Date	Issuer's Initials	Total Charges	Total Refunds	Net Usage	Current Balance*
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MODIFY AN EXISTING VOUCHER

- To modify an existing voucher enter the voucher number in the top search field and click 'Search.'
- Make any necessary changes and click 'Modify.'
- Note - the dollar amount entered upon modification becomes that new dollar amount available for the student to spend.
 - If there is \$20 left on the voucher, and you enter \$100, the available amount will be \$100 not \$120.

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Create/Modify Voucher Code

Use the form below to modify details or balance on the voucher

Your Initials:	BMM
Student's Name:	Students, EMBA
Voucher Number:	EMBA_022021_022022
Dollar Amount:	99999.99
Student Email Address:	reporders@akademos.ci
Notify Student:	<input type="checkbox"/>
Expiration Date (MM-DD-YYYY):	03-31-2026
Issue Date: 04-21-22 1:43PM	
<input type="button" value="Modify"/>	

[Click here to start over](#)

Create a new Comment

Voucher History for EMBA_022021_022022

Time	Comment	New Balance	Charge Amount
04-25-22 4:25pm	Code modified by aorlov	\$ 99999.99	\$ n/a
04-25-22 11:53am	Order placed: 4318837	\$ n/a	\$ 325.02
04-25-22 11:30am	Order placed: 4318828	\$ n/a	\$ 275.63
04-25-22 11:28am	Order placed: 4318825	\$ n/a	\$ 300.26
04-25-22 10:03am	Order placed: 4318784	\$ n/a	\$ 276.90
04-25-22 10:01am	Order placed: 4318782	\$ n/a	\$ 325.02
04-22-22 12:56pm	Refund on order: 4316162	\$ n/a	\$ 236.40
04-22-22 12:56pm	Order placed: 4316162	\$ n/a	\$ 0.00