SAVANCE WORKPLACE

Wallet Pass

Getting Started Guide (Cloud)

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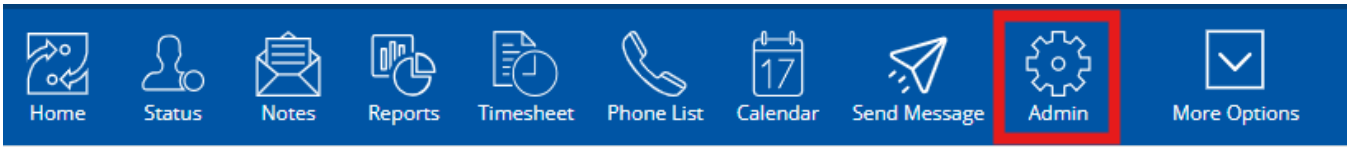
Overview

The Wallet Pass integration allows organizations to send customized digital wallet passes directly to visitors.

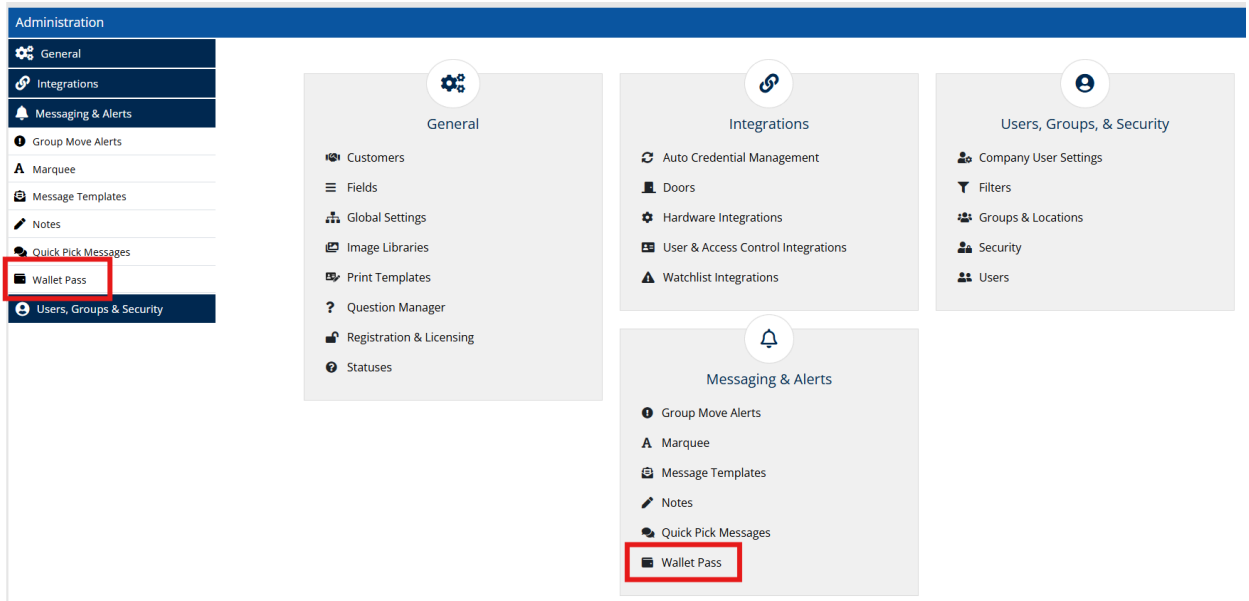
When pre-registered visitors receive their confirmation email, they can select **"Download Wallet Pass"**. This automatically downloads the custom pass (complete with a QR code) directly to their mobile Wallet app.

Step 1: Create a Wallet Pass Template

1. Log in with an admin account at https://cloud.savanceworkplace.com.
2. On the main toolbar, click **Admin**.



3. Under **Messaging & Alerts**, click **Wallet Pass.**



Wallet Pass Configuration Screen

Wallet Pass Template: View organizational templates and the base system template.
Set as Default: Designate the active template as your organization's default.
Add New: Create a new template.
Clone: Duplicate an existing template.
Delete: Remove a custom template.

***Note**: The **System Wallet Pass (System)** template cannot be deleted or edited directly. Attempting to edit it automatically generates an editable copy.*

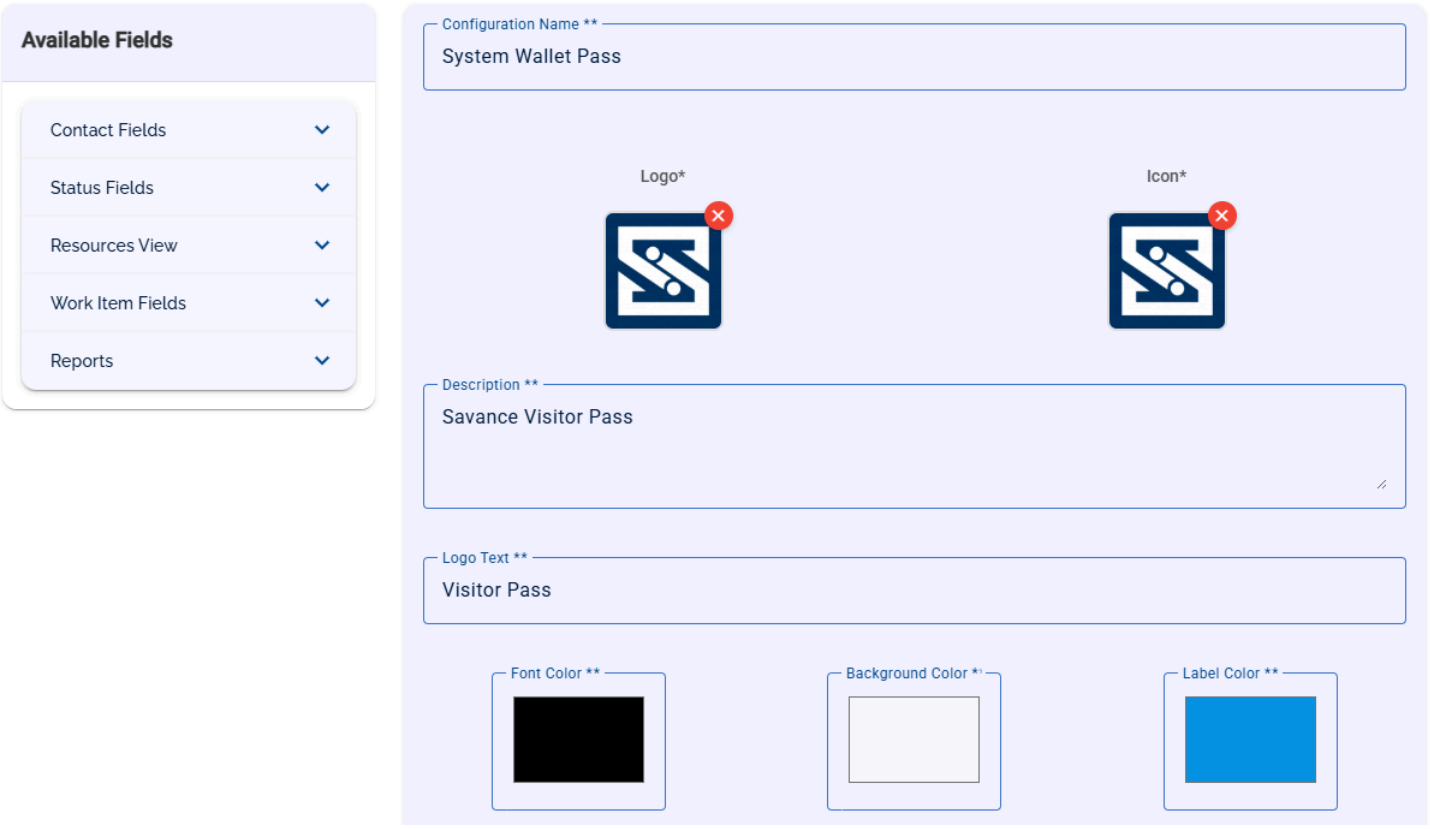
Step 2: Configure Template Fields

Edit the template by configuring the following fields:

Required Fields: Description, Logo Text, Logo Image, Icon Image, Background Color, Font Color, Label Color, and Primary Field.

Optional Fields: Header Fields (up to 3), Secondary Fields (up to 4), Auxiliary Fields (up to 4), and Back Fields (up to 4).

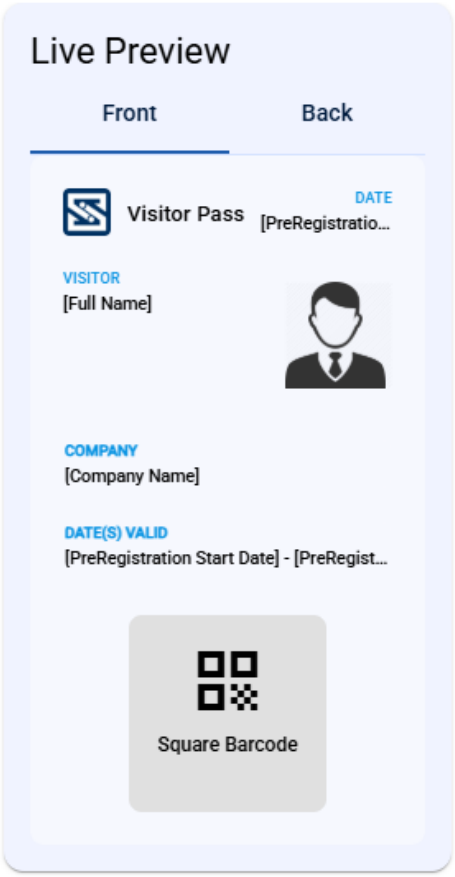
Configuration Options for Wallet Pass



Setting / Feature	Description
Available Fields	A list of placeholders. Drag and drop these into Label or Value fields. The backend populates actual data automatically upon sending.

Setting / Feature	Description
Configuration Name	The internal name for your template.
Logo & Icon	Logo: Displayed in the top-left corner of the pass. Icon: Displayed when sharing the pass.
Description	Populates the pass description in Pass Details.
Colors	Customize Font Color, Background Color, and Label Color.
Live Preview	Displays a visual representation of the pass. Includes placeholders for the Person Silhouette (user photo or default thumbnail) and the Square Barcode (QR code).

Live Preview



The Live Preview displays a preview of how the pass will appear in the wallet. The live preview may not always be 100% accurate, but it provides a general representation of the final layout.

Person Silhouette Image - User profile photo will be displayed here. If no profile picture exists, a default thumbnail image is applied.

Square Barcode - QR code will automatically be generated for Wallet Pass and displayed in this placeholder.

Save and Cancel Buttons

The Save and Cancel buttons can be found in the bottom-right corner of the screen at any time during configuration. They only become active after making changes to the current template.

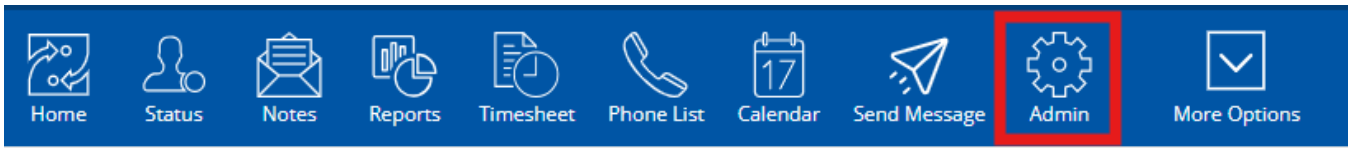
- Click the **Save** button to save all current changes.
- Click on the Cancel button to cancel any changes made since your last save.

Step 3: Add Wallet Pass to Message Templates

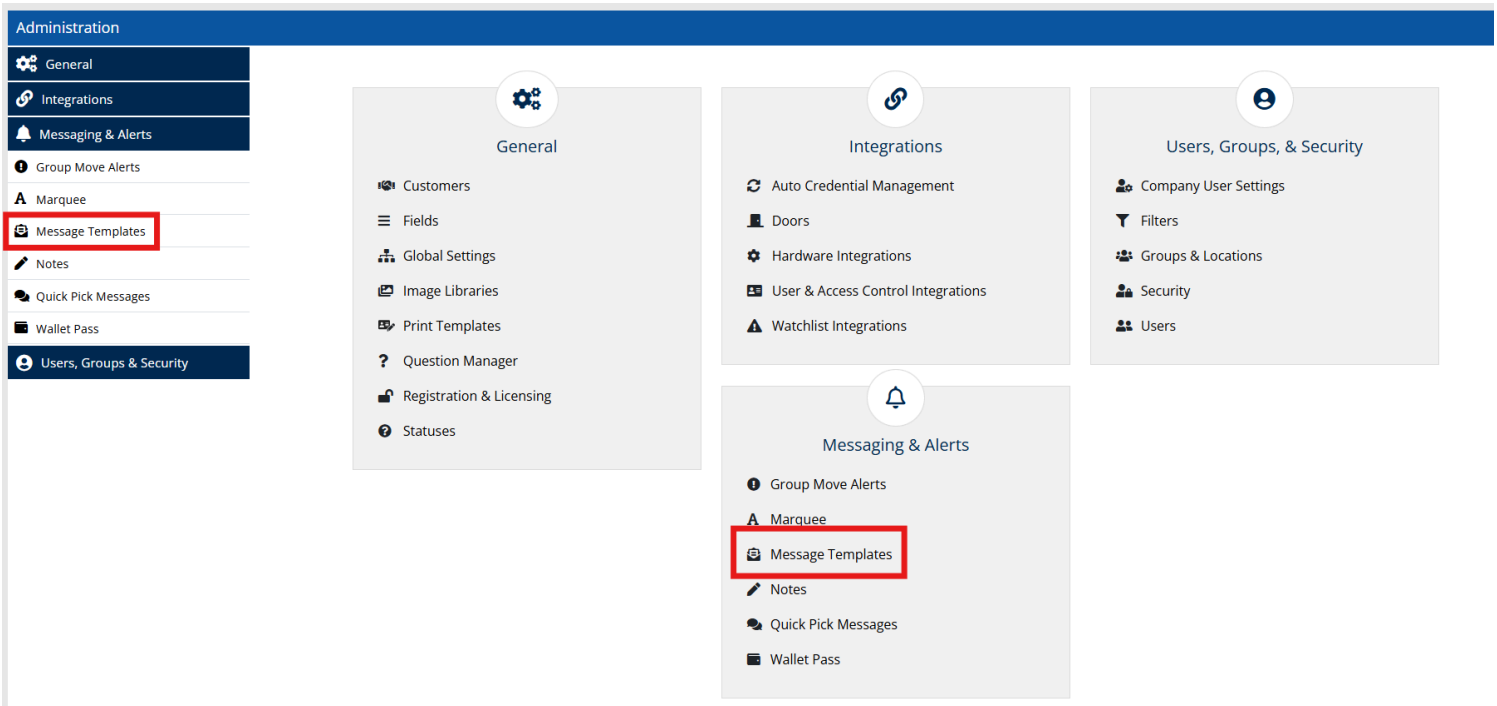
Once created, you must attach your Wallet Pass to an email/text message template.

Message templates can be accessed from https://cloud.savanceworkplace.com by logging in with an admin account.

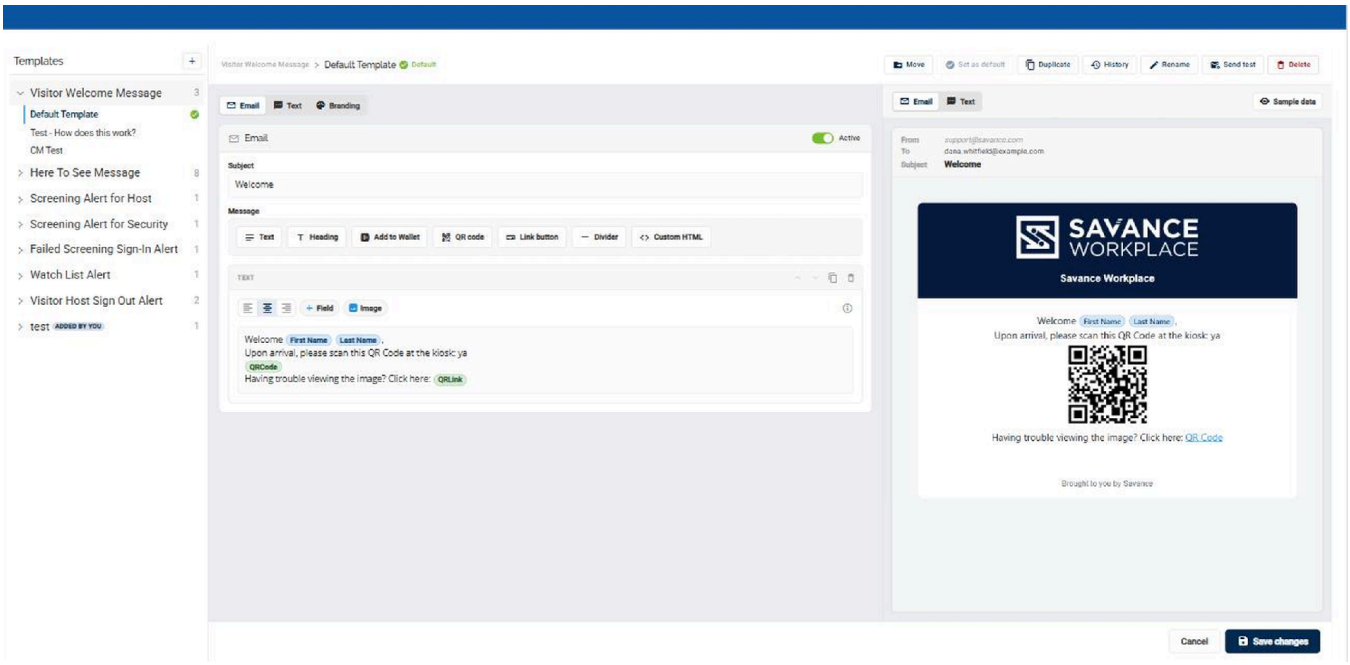
1. On the Toolbar, click **Admin**



2. Click on **Message Templates** under Messaging & Alerts



Message Templates Screen



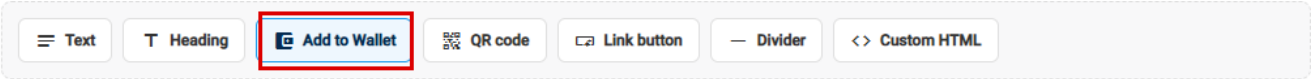
Message templates are grouped by type in the Templates list on the left. Expand a type to see the templates it contains, then click a template to open it.

Email, Text, and Branding - Tabs that switch between the parts of the template.
Message - The body of the email, built from blocks. The toolbar above the message adds a new block: Text, Heading, Add to Wallet, QR code, Link button, Divider, or Custom HTML.
Preview - The panel on the right shows how the message will look. Use its Email and Text tabs to switch between the two formats, and the Sample data / Current values button to change the data used to fill the preview.
Save Changes and Cancel - Found in the bottom right hand corner of the screen. They only become active after making changes to the current template.

Adding Wallet Pass to Message Template

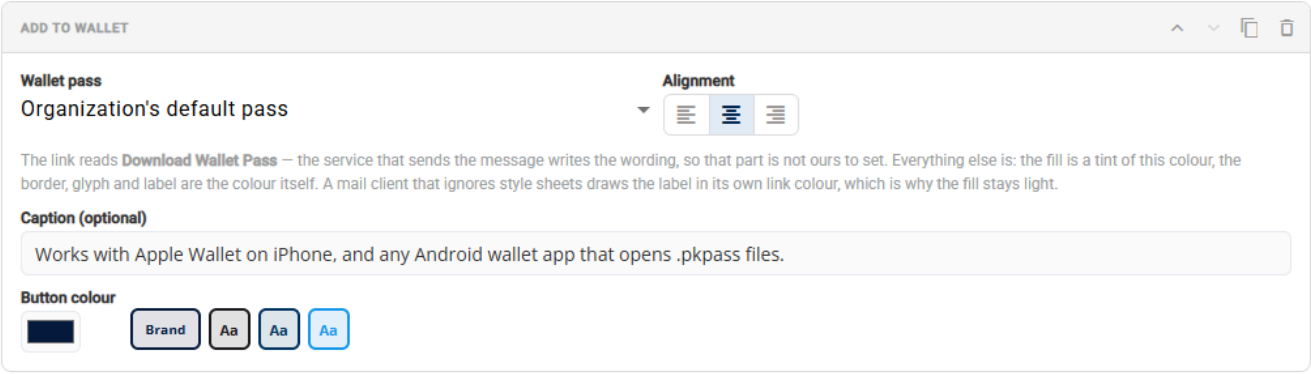
The Wallet Pass download link is added as an Add to Wallet block. It is no longer added by dragging a placeholder into the email body.

1. In the Templates list, expand a template type and select the template to be edited.
2. On the Email tab, click Add to Wallet in the block toolbar.

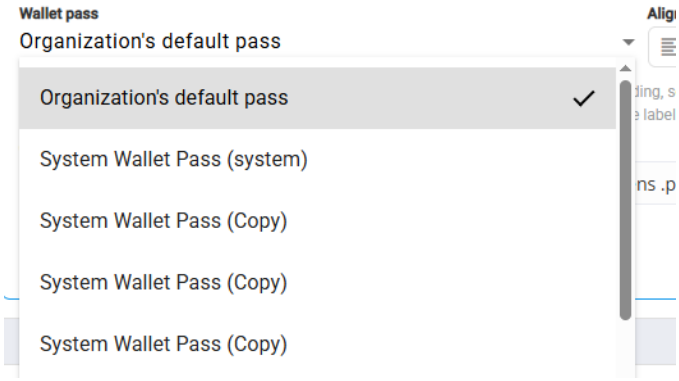


   a. The block is added to the end of the message.
   b. Use the arrows in the block header to move the block up or down, the copy icon to duplicate it, and the trash icon to remove it.

3. Configure the block using the fields described below.



Wallet Pass - Selects which Wallet Pass template the download link uses.



- The organization's default pass uses the template set as Default on the Wallet Pass configuration page. If no default template is found, the system template will be used instead.
- Any other Wallet Pass template can be selected by name from the list.

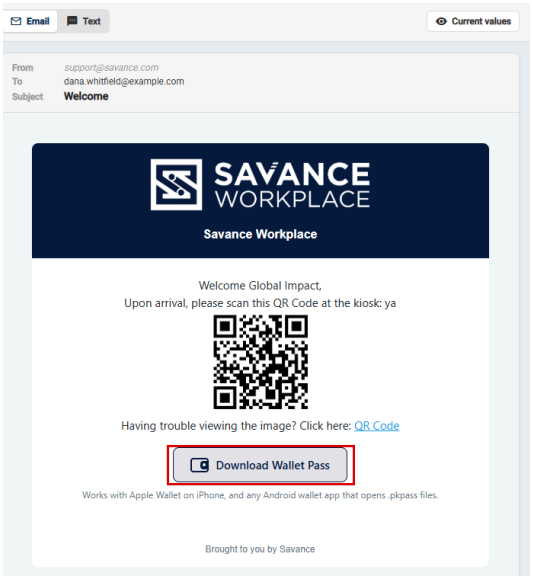
Alignment - Aligns the button to the left, center, or right of the message.

Caption (optional) - Small text shown beneath the button, for example “Works with Apple Wallet on iPhone, and any Android wallet app that opens .pkpass files.”

Button Color - Sets the color of the button. Choose a custom color with the swatch on the left, or select one of the presets: Brand (the color of the message header), Wallet dark, Savance navy, or Savance blue.

Note: The button always reads Download Wallet Pass. The wording is set by the service that sends the message and cannot be changed in the template.

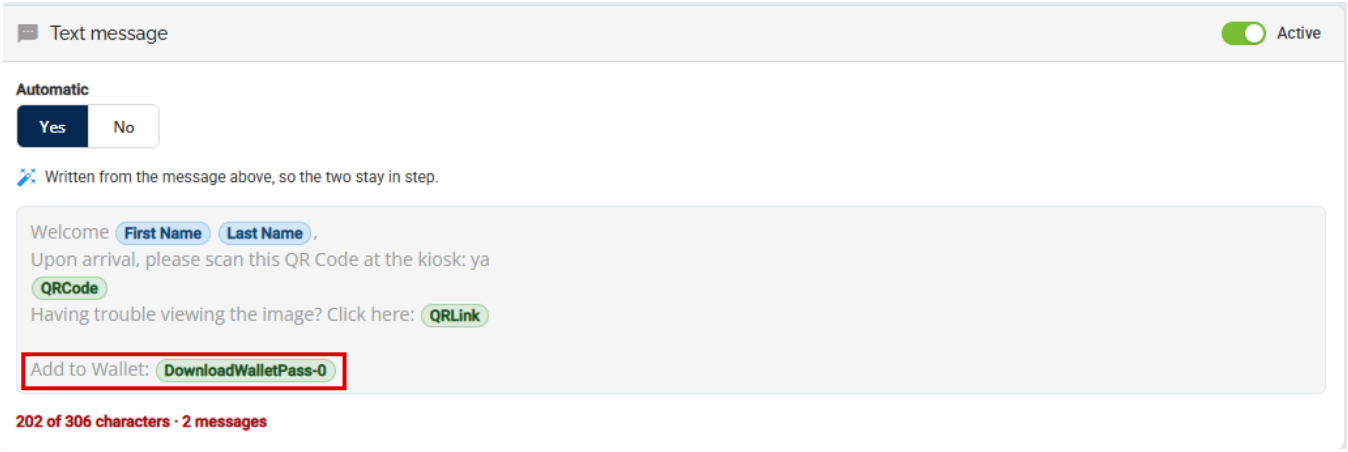
4. Check the Preview panel. The Download Wallet Pass button appears in the message where the block was placed.



5. Click Save changes to save the template.

Wallet Pass in Text Messages (SMS)

On the Text tab, Automatic is set to Yes by default, which writes the text message from the email so the two stay in step. When the email contains an Add to Wallet block, the text message includes the matching Wallet Pass link.



- The link is written as the placeholder [DownloadWalletPass-(TemplateId)]. A “TemplateId = 0” indicates the organization’s default template; if no default template is found, the system template will be used instead.
- Selecting a specific pass in the Add to Wallet block updates the placeholder to that template’s ID. The TemplateId for each template can be found on the Wallet Pass configuration page.
- Setting Automatic to No allows the text message to be written by hand. Switching back to automatic keeps the text that was entered.
- The counter below the message shows how many characters have been used and how many text messages will be sent.