



VisionaryVouchers – Managing Your Platform

We're thrilled that you are up and running with your VisionaryVoucher account and are enjoying selling and redeeming Gift Vouchers.

This short help file will allow you to use VisionaryVouchers efficiently and ensure a seamless experience for you and your customers.

CRMS

You have been provided with 2 Customer Relationship Management files which are effectively 2 databases that show what vouchers you've sold, and which vouchers you've redeemed via the Table Side App.

Sales CRM

This is where you see what vouchers been purchased. This CRM includes all of the data associated with individual sales.

Refunding

This CRM also allows you to refund customers for any discretionary reason.

Payment Summary	Transaction Summary
Processor: Stripe	Your Voucher Selection - £100 £100.00 Voucher
Description: [Redacted]	Subtotal: £100.00
Order ID: F224E281T1	Processing Fee: £2.00
	Order Total: £102.00

✓ **£102.00 Paid**
on 21/06/2025 14:39

4367

Refund

Once the refund has been actioned the status of the purchase will change, and the transaction should remain in place for the 12-month period the voucher would have been valid within.

Abandoned Carts – No Payment

Within the **Sales CRM** this is where you can see abandoned carts where clients may have attempted to purchase a voucher but didn't complete the purchase. You can follow up on these either by email or telephone to see if the customer wishes to complete the purchase. If they choose not to, it's important that you delete this entry from the CRM database, so it doesn't show up within the Redemption App

Abandoned Carts will show in the Sales CRM Status Column as 'Incomplete'.

#	▼ Status	Submitted	Your Vouch...	Quantity of...	Voucher St...
251	● <u>Incomplete</u>	14/05/2025 11:52	£50 Voucher	1	Unredeemed
250	● Submitted	14/05/2025 03:34	£100 Vouch...	1	Unredeemed
249	● Submitted	09/05/2025 12:01	£150 Vouch...	1	Unredeemed

If any customer attempts to use their abandoned cart to use a voucher you can easily tell from their sales transaction that the payment has not been made and that the voucher is not valid.

Payment Summary	Transaction Summary	
Processor:	Your Voucher Selection - £100	£100.00
Description:	Voucher	
Order ID: F224E242T1	Subtotal:	£100.00
£102.00 Unpaid	Processing Fee:	£2.00
	Order Total:	£102.00
	<input type="button" value="Submit Payment"/>	

Managing Expiry Dates

Generally, all vouchers are valid for 12 months from the date of purchase. When more than 12 months have passed and any voucher hasn't been redeemed, we call these Broken Vouchers, and they can be removed from your CRM if you so choose. This allows the Redemption App to work with the cleanest and most up to date set of data.

GDPR

We take GDPR seriously which is why FlexiVouchers has an opt-in choose should they wish to hear from you. We also extend GDPR security by not storing any credit card data that belongs to your clients.

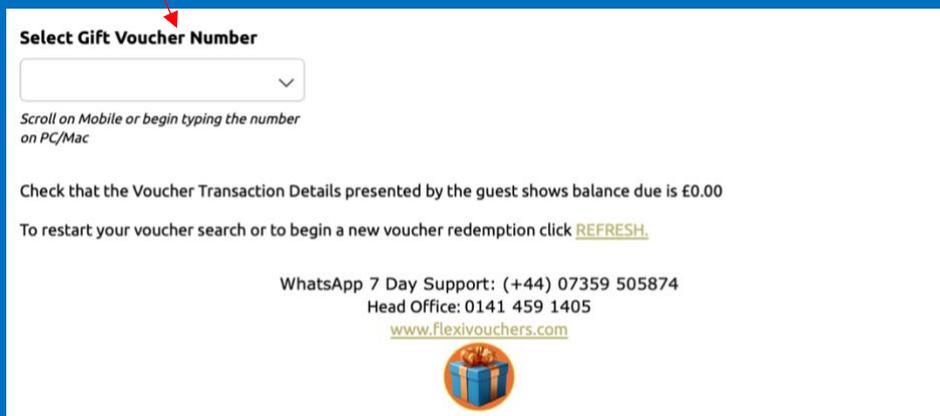
Redeeming Vouchers

There are two ways in which you can redeem vouchers, either directly within the CRM on a Laptop or Mobile device or by using the Redemption Portal also either on a Laptop or Mobile device.

The quickest and easiest method is by using the Redemption Portal but if you require further information about any redemption, you can always access the Master Redemption CRM.

The Redemption Portal

1. Select Voucher Number from Drop Down



Select Gift Voucher Number

Scroll on Mobile or begin typing the number on PC/Mac

Check that the Voucher Transaction Details presented by the guest shows balance due is £0.00

To restart your voucher search or to begin a new voucher redemption click [REFRESH](#).

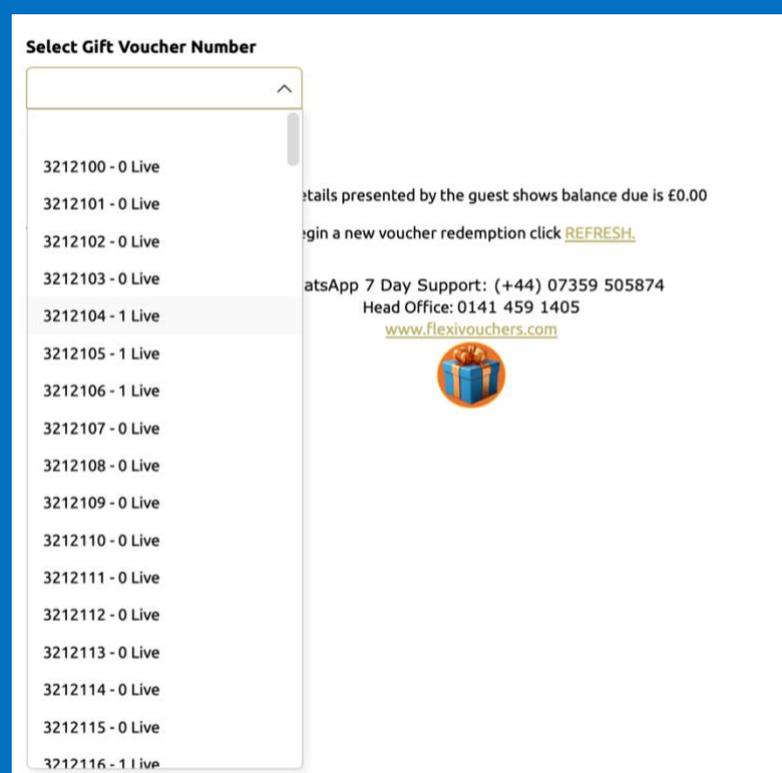
WhatsApp 7 Day Support: (+44) 07359 505874
Head Office: 0141 459 1405
www.flexivouchers.com



When using a mobile device ensure that you have good Wifi or 4G/5G coverage.

On a Mobile device you need to scroll to find the correct Voucher code. In this instance all codes are listed numerically and so is convenient to locate.

On a Laptop or PC you can simply begin typing the voucher number and the voucher number you're looking for will be filtered



Select Gift Voucher Number

Details presented by the guest shows balance due is £0.00

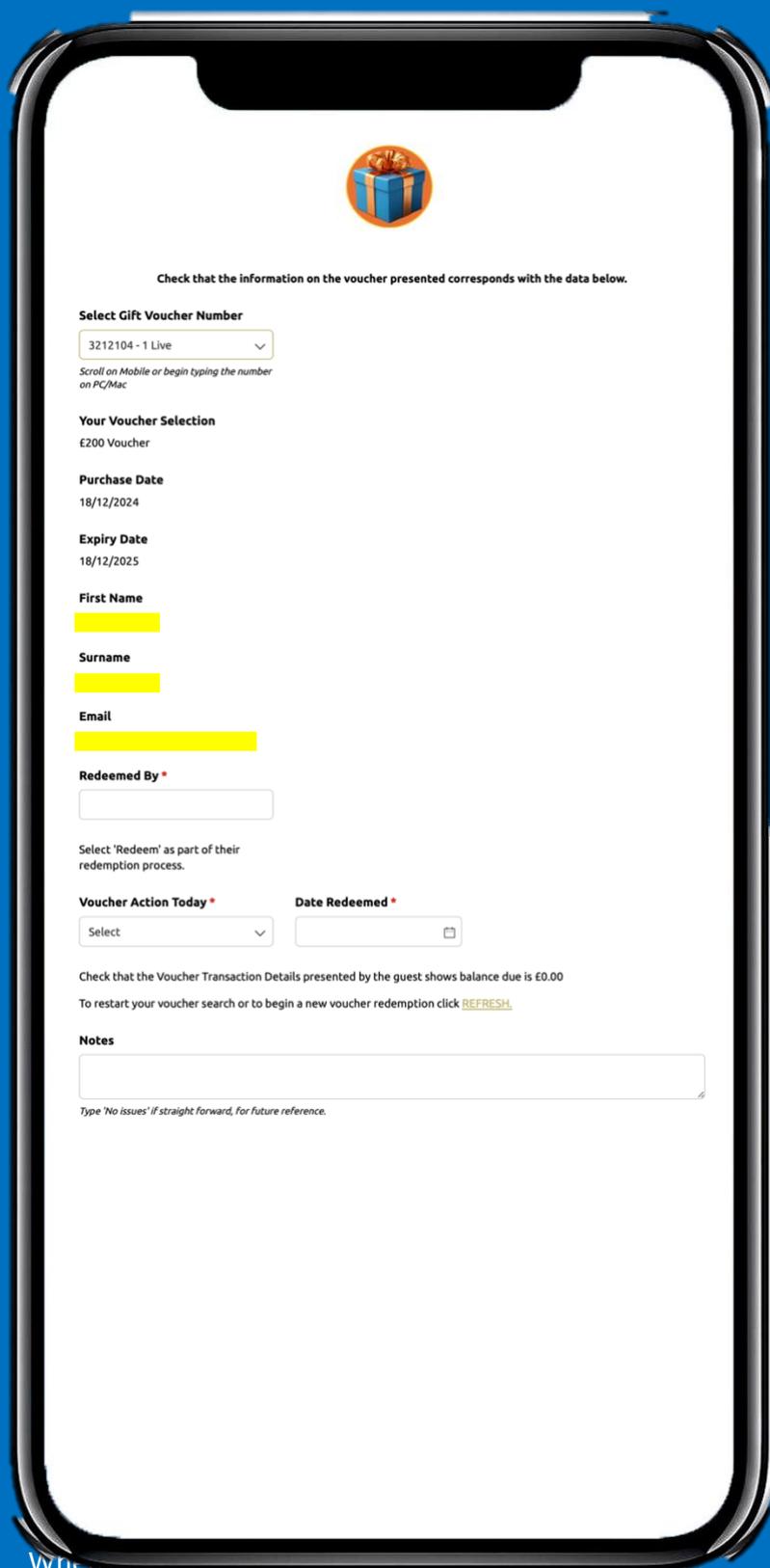
Begin a new voucher redemption click [REFRESH](#).

WhatsApp 7 Day Support: (+44) 07359 505874
Head Office: 0141 459 1405
www.flexivouchers.com



3212100 - 0 Live
3212101 - 0 Live
3212102 - 0 Live
3212103 - 0 Live
3212104 - 1 Live
3212105 - 1 Live
3212106 - 1 Live
3212107 - 0 Live
3212108 - 0 Live
3212109 - 0 Live
3212110 - 0 Live
3212111 - 0 Live
3212112 - 0 Live
3212113 - 0 Live
3212114 - 0 Live
3212115 - 0 Live
3212116 - 1 Live

Redeeming via the Redemption App/Platform



The image shows a smartphone screen with a voucher redemption form. At the top, there is a gift icon. Below it, a message reads: "Check that the information on the voucher presented corresponds with the data below." The form includes several sections: "Select Gift Voucher Number" with a dropdown menu showing "3212104 - 1 Live"; "Your Voucher Selection" showing "£200 Voucher"; "Purchase Date" as "18/12/2024"; "Expiry Date" as "18/12/2025"; "First Name" and "Surname" fields with yellow redaction bars; "Email" field with a yellow redaction bar; "Redeemed By" field with a yellow redaction bar; "Voucher Action Today" dropdown menu with "Select" and "Date Redeemed" calendar field; and a "Notes" text area with a yellow redaction bar. A "REFRESH" link is also visible.

Check that the information on the voucher presented corresponds with the data below.

Select Gift Voucher Number
3212104 - 1 Live

Scroll on Mobile or begin typing the number on PC/Mac

Your Voucher Selection
£200 Voucher

Purchase Date
18/12/2024

Expiry Date
18/12/2025

First Name
[Redacted]

Surname
[Redacted]

Email
[Redacted]

Redeemed By *
[Redacted]

Select 'Redeem' as part of their redemption process.

Voucher Action Today * **Date Redeemed ***
Select [Calendar Icon]

Check that the Voucher Transaction Details presented by the guest shows balance due is £0.00
To restart your voucher search or to begin a new voucher redemption click [REFRESH](#).

Notes
[Redacted]

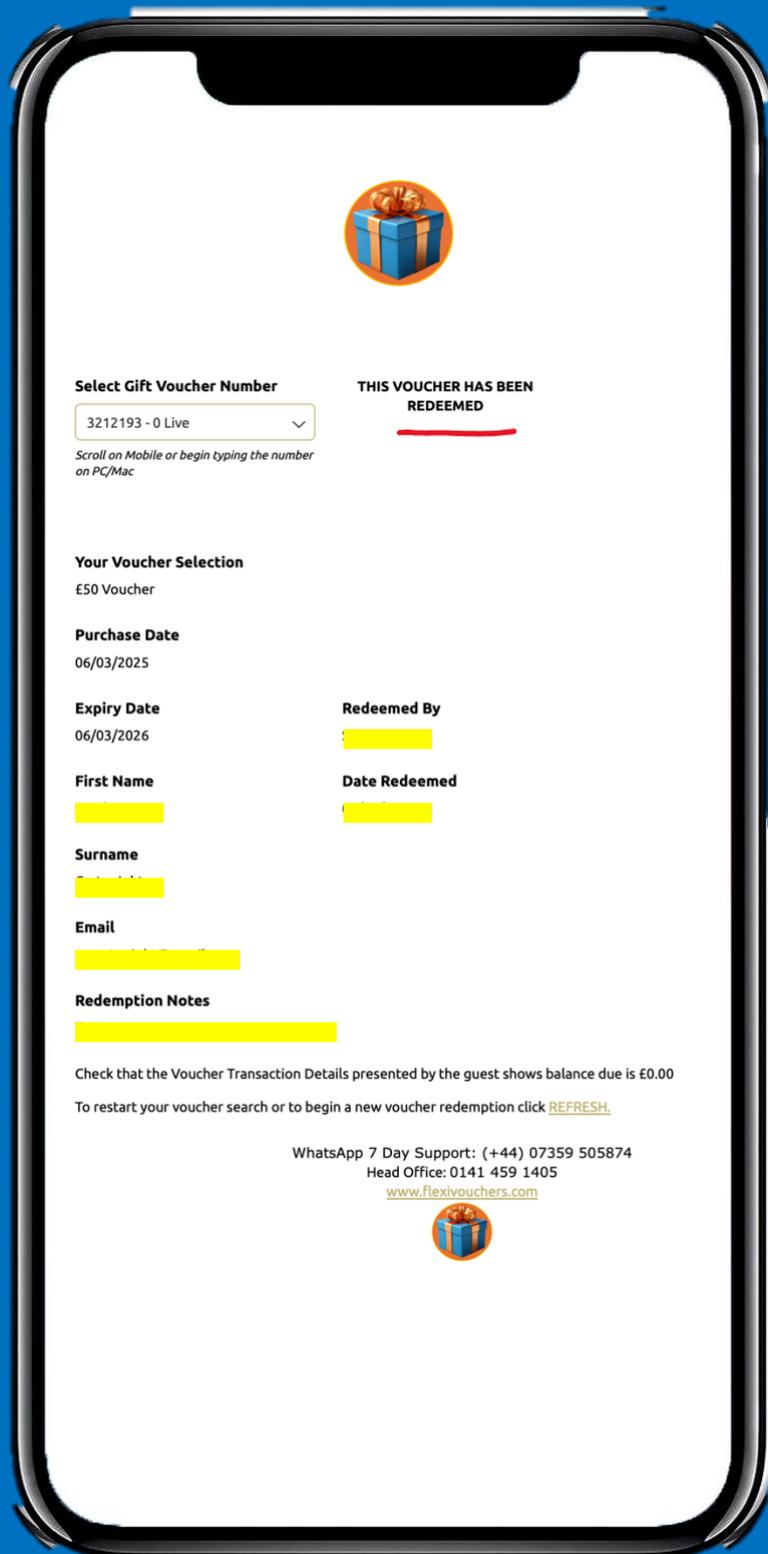
Type 'No issues' if straight forward, for future reference.

This is an example of a voucher yet to be redeemed. To redeem the file simply complete the 'Redeemed by' box with the colleague's name redeeming. Then select 'Redeemed from the 'Action Take Today' field and select the date.

You can also add any notes regarding this booking for future reference.

When searching for this voucher in the future the Redemption App will tell you that there will be 0 – Live

What a Redeemed Voucher looks like on the Redemption App



This what you will see if the voucher number that you've searched for has already been redeemed.

Areas shaded in yellow will contain your live data.

Always request proof of purchase when redeeming your Gift Vouchers. Whilst Voucher designs can be challenging to copy it's not impossible for those intent on potentially defrauding the system.

We've found it very rare that a voucher is presented twice for redemption. However, examples of where this has happened is when the client who purchased it for someone else may have forgotten that they shared it and has attempted to use it themselves.

Extracting Data for your Finance Function

Gift Voucher revenue is automatically transferred to your Stripe Account when a purchase is made. This transaction moves to your deposit ledger and doesn't become revenue until a voucher is redeemed.

On this basis your account's function will need a monthly check on what has been sold and what has been redeemed. The value of what has been redeemed moves into your revenue.

Because different businesses operate in a variety of ways, we allow users to simply extract the data from Cognito into Microsoft Excel. For this position you can run a variety of reports to suit the data points that your business values.

Data points managed via Excel can include:

- Gift Vouchers sold YTD
- Gift Vouchers sold by Month
- Gift Vouchers redeemed YTD
- Gift Vouchers sold by Month

- Gift Vouchers Sales Value YTD
- Gift Vouchers Sales Value by Month

- Popularity of Gift Vouchers sold YTD
- Popularity of Gift Vouchers sold by Month.

Most frequent Gift Voucher Redemption by Day or Week

You may wish to focus your Gift Vouchers within a sales Campaign such as Easter, Black Friday or Christmas.

Different levels of Microsoft Excel can create simple filtered lists or more advanced Pivot Tables to summarise precision data.

Data Security

We suggest that FlexiVouchers is used only by trained staff, potentially Supervisor Level upwards and that only senior members of your team have the authority to refund and perform other functions.

Customers with access to your online Gift Vouchers

As long as the customer has a credit card it is simple and easy to generate a Gift Voucher for them. Simply enter the customers details and when you need to complete an email address, simply send it to your own business account so you can print a copy for the customer.

Marketing your FlexiVouchers

With Gift Vouchers providing a useful and meaningful advanced sales pipeline, you really want to make your Gift Vouchers available to as many people as possible, because by their very nature, Gift Vouchers delivery new customers to your business.

On this basis FlexiVoucher customers use a variety of options to spread the word.

1. Social Media story telling for community messaging.
2. Prominent position on your website.
3. Tasteful and attractive QR codes in little frames either on your bar, dotted around your restaurant or reception, or even in bedrooms. Some clients have frames on the back of toilet cubicle doors.
4. Link your Gift Vouchers to seasonal events (Christmas, Easter) and big calendar dates such as Mother's Day or Father's Day.
5. Gift Vouchers provide first impression opportunities for new customers.
6. If you have website traffic metrics on your website, understand how and when your customers are responding to your marketing activities.

Summary

1. Access both CRM's frequently to:
 - Assess Sales
 - Be aware of and leverage Abandoned Carts
 - Check rate of redemptions.
 - Don't just rely on your Redemption App.
2. Train your team to not just manage the FlexiVoucher system but to know enough about vouchers to include Gift Vouchers in conversations with customers.
3. Your trained team might also be able to generate Gift Vouchers for customers who may struggle with online access.
4. Ensure you have a solid data extraction plan for your finance function, so you have a good grasp of what Gift Voucher values are dropping into revenue and which are being held in the deposit ledger.
5. Keep your Vouchers fresh both in terms of content (monetary / experience) and design.
6. Always seek proof of purchase.
7. Check the Gift Voucher number as soon as you become aware that a Gift Voucher is going to be used. Gift Vouchers should be accompanied by a Transaction Invoice where possible as proof of purchase

