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USER MANUAL

EzyOffice – Ezygift

Gift Voucher Setup Guide

For venue owners and managers

Version 1.0 | October 2026

Prepared by Bepoz

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Introduction

Ezygift lets your customers buy gift vouchers on your website and social media, any time of day. Each voucher is created in your Bepoz system automatically and redeemed at your tills like any other voucher. This manual shows venue owners and managers how to set up and manage Ezygift themselves in the EzyOffice Client Portal.

What Ezygift does

Ezygift gives your venue its own online voucher page, in your branding. Customers choose a voucher, pay by card and the voucher is emailed to the person they are gifting. Payments go straight to your Stripe account.

Your voucher page: Ezygift gift vouchers

Who uses it

Who	What they do
Venue owner or manager	Manages branding, voucher terms and settings; reviews sales and refunds in Stripe
Front-of-house staff	Redeem vouchers at the till
Your web designer	Adds the voucher page link or embed to your website
Your IT provider	Opens one network connection to your Bepoz server (one-off)
Your customers	Buy vouchers online; recipients receive them by email
Bepoz	Sets everything up, trains your team and provides support

The main parts

Part	What it is for	Who uses it
Gift voucher page	Your online voucher shop, in your branding	Customers
EzyOffice Client Portal	Manage branding and terms, create gift certificates, view sales and run reports	Owner or manager
Stripe account	Takes card payments and pays them to your bank	Owner or manager
Voucher emails	A receipt for the buyer and the voucher PDF for the recipient	Customers
Bepoz POS	Holds each voucher and redeems it at the till	Staff
Website link or embed	Places the voucher page on your website and social media	Web designer

How it works

A voucher bought online goes into your Bepoz system automatically, with no manual entry by your staff.

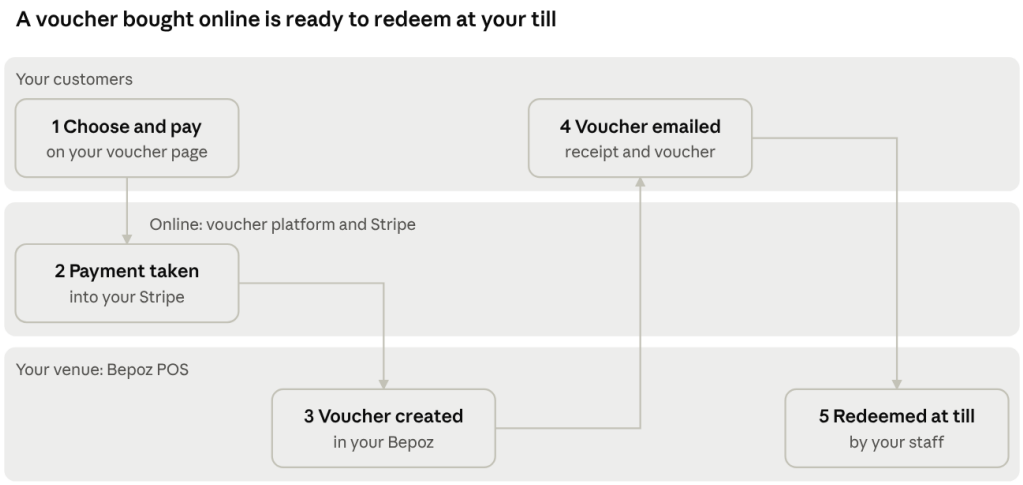


Figure 1. How an online voucher reaches your till

1. The customer chooses a voucher on your page and pays by card.
2. Stripe takes the payment into your account.
3. The voucher is created in your Bepoz system.
4. The buyer receives a receipt and the recipient receives the voucher by email.
5. The recipient brings the voucher to your venue and staff redeem it at the till.

Step 1: Set up your venue settings

Your venue settings control how your voucher page looks, the terms customers accept and what appears on the voucher PDF. Bepoz completes the POS connection during installation; you can manage the rest.

1. Log in to the Bepoz EzyOffice Client Portal.
2. In the left menu, click **Venues**, then open your venue to reach **Edit Venue**.
3. Work through the tabs below, then click **OK** to save, or **Cancel** to discard.
4. Make a test purchase while Stripe Testing Mode is on, then ask Bepoz to switch to live.

Ezygift uses these tabs: **General**, **Legal Notice**, **Payment**, **Color Settings**, **Emails**, **PDF Settings**, **Widget Integration** and **Tax Setup**. The **Joinup Fields** and **Banners** tabs are for EzeJoin membership only.

General tab

The General tab holds your branding, venue details and business number.

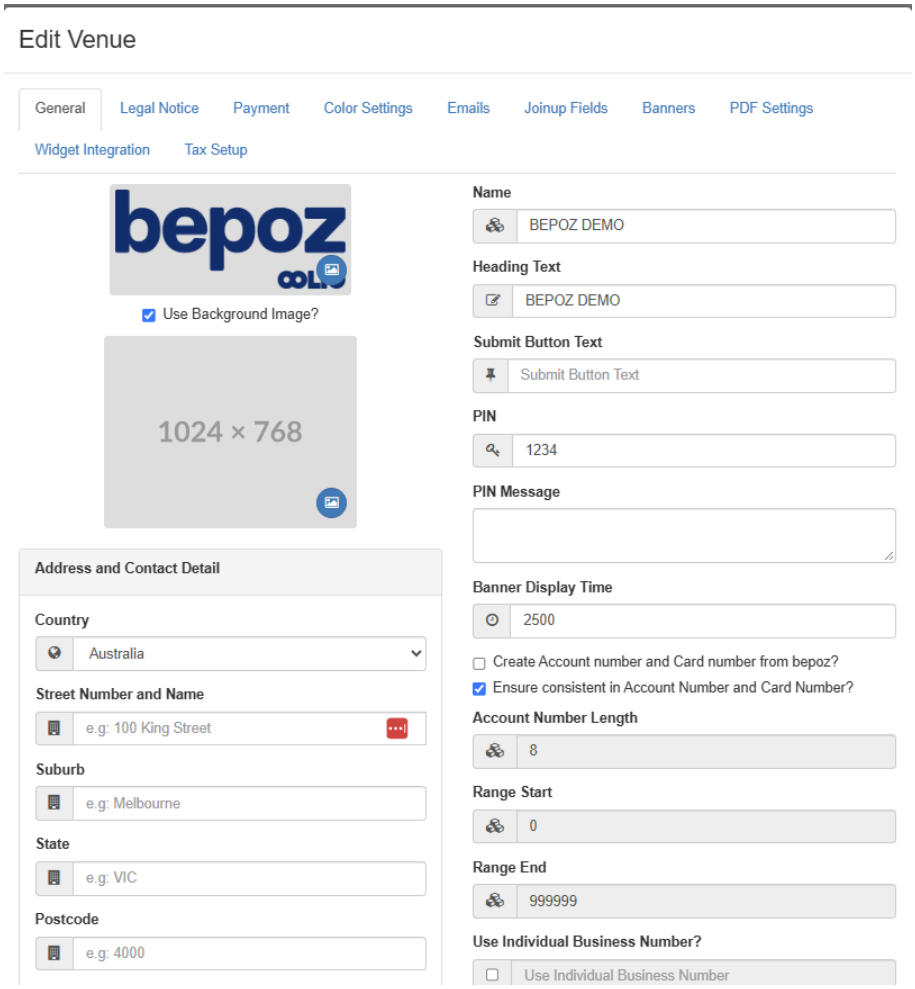


Figure 2. Edit Venue, General tab

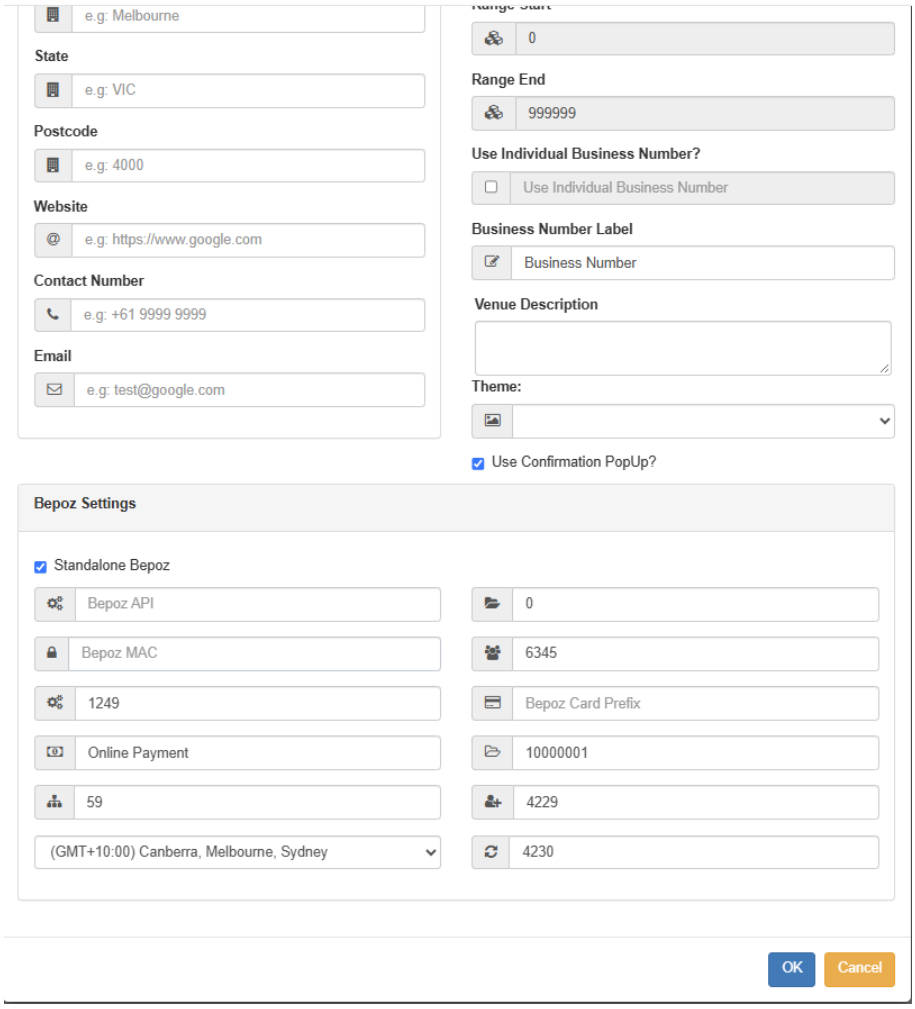


Figure 3. General tab, lower half and Bepoz Settings

Field	What it does
Logo	Your venue logo; click the image icon to upload
Use Background Image?	Tick to show a background image (1024 x 768 px) behind your pages, then upload it
Name	Your venue name as customers see it
Heading Text	The heading shown at the top of your pages
Country, Street Number and Name, Suburb, State, Postcode	Your venue address; also printed in the voucher PDF footer
Website, Contact Number, Email	Your venue contact details; also available for the voucher PDF footer
Use Individual Business Number?	Tick to use a business number different from your organisation's
Business Number Label	The label shown beside your business number, e.g. "ABN" or "NZBN"
Venue Description	A short description of your venue

Field	What it does
Theme	A preset look for your pages
Use Confirmation PopUp?	Shows customers a confirmation pop-up
Bepoz Settings	The connection to your Bepoz POS; set by Bepoz, please don't change

Submit Button Text, PIN, PIN Message, Banner Display Time and the account number fields are used by EzeJoin membership only; leave them as they are.

Legal Notice tab

The Legal Notice tab holds the terms customers accept when they buy, and the marketing opt-in.

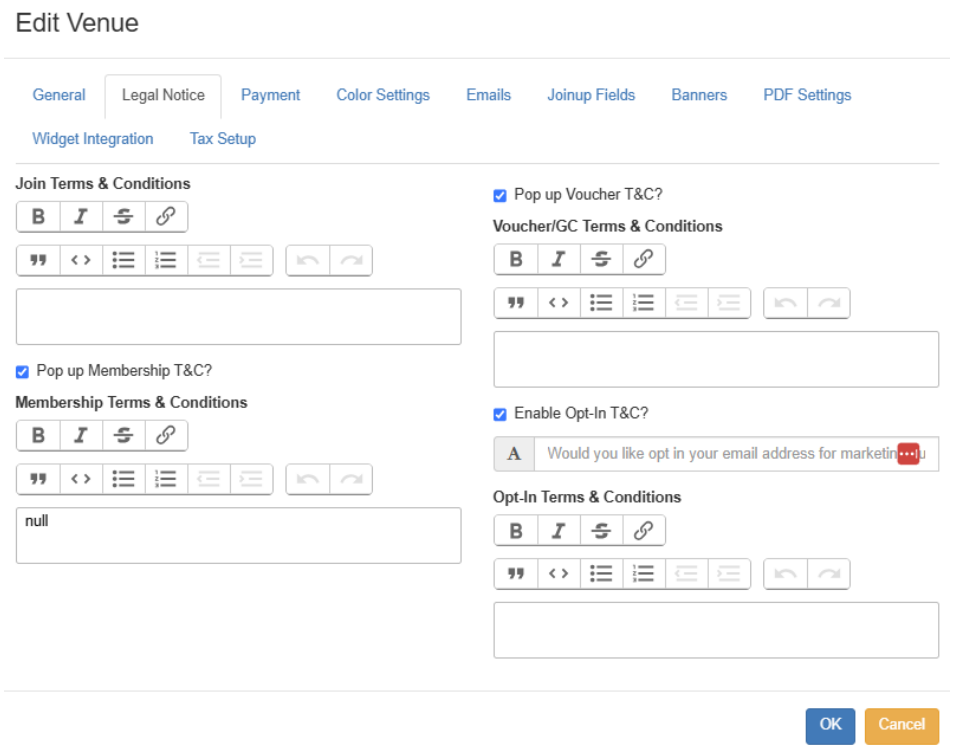


Figure 4. Edit Venue, Legal Notice tab

Field	What it does
Pop up Voucher T&C?	Tick to show your voucher terms to customers in a pop-up at checkout
Voucher/GC Terms & Conditions	The terms that apply to your gift vouchers
Enable Opt-In T&C?	Tick to ask buyers whether they want to receive marketing emails
Opt-In question	The question buyers see, e.g. "Would you like to opt in your email address for marketing?"
Opt-In Terms & Conditions	The terms that apply to marketing opt-in

Buyers who opt in show as **Yes** in the Opt In? column of Transactions v2 and in the EzyGift Opt-In report. Join and Membership Terms & Conditions are for EzeJoin membership only.

Payment tab (Stripe)

The Payment tab connects your Stripe account, which takes card payments for Ezygift and pays them to your bank.

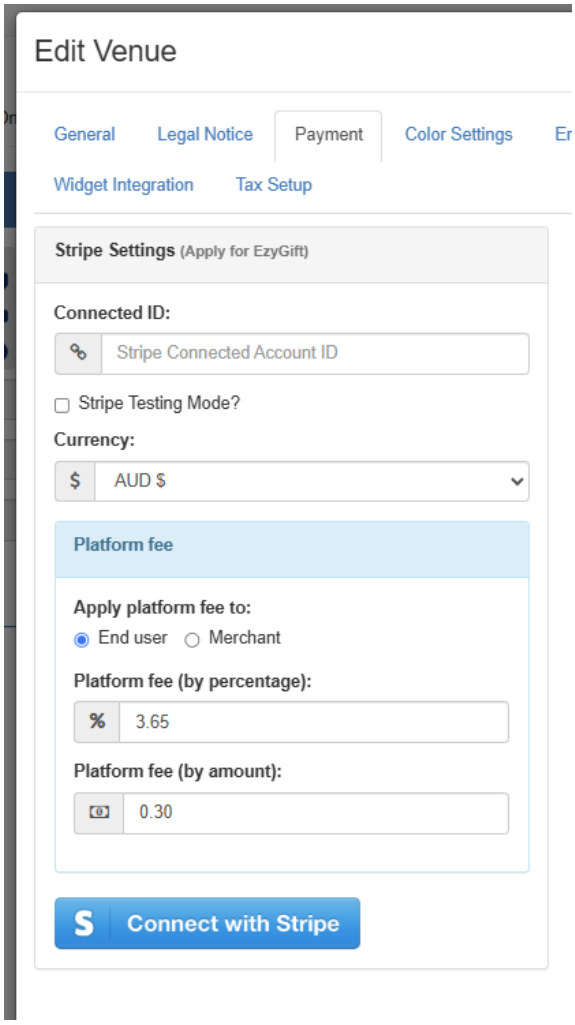


Figure 5. Edit Venue, Payment tab

Field	What it does
Connected ID	Your Stripe account ID, starting with acct_; the venue owner or manager provides this from their Stripe account
Stripe Testing Mode?	Tick to test purchases without real charges; untick to go live
Currency	The currency vouchers are sold in, e.g. AUD $
Apply platform fee to: End user	The platform fee is added to the customer's purchase
Apply platform fee to: Merchant	The platform fee is paid by your venue, from the purchase amount
Platform fee (by percentage)	The percentage part of the fee, e.g. 3.65%
Platform fee (by amount)	The fixed part of the fee per purchase, e.g. $0.30
Connect with Stripe	Opens Stripe so you can sign in to an existing account or create a new one

To connect Stripe (venue owner or manager):

1. If you don't have a Stripe account yet, click **Connect with Stripe** and complete the form to create one.
2. Log in to your Stripe Dashboard and copy your account ID, which starts with **acct_** (found in your Stripe account settings).
3. Paste it into **Connected ID** on the Payment tab.
4. Click **OK** to save, then make a test purchase with **Stripe Testing Mode?** ticked.

Platform fee rates follow your agreement with Bepoz; please contact Bepoz before changing them. When the fee is applied to the end user, it appears in the **Card Service Fee** column of the Daily Summary report.

Emails tab

Field	What it does
Voucher receipt	Email sent to the buyer with their invoice
Voucher	Email sent to the recipient with the voucher PDF
Active	Tick to send that email
Sender Name	The sender name customers see, usually your venue name
Subject	The email subject line

Bepoz designs your email templates in your branding. Leave **Template Name** and **Sender Email Address** as Bepoz set them, or emails may stop sending.

Color Settings tab

The Color Settings tab sets the colours of your voucher page. Enter each colour as a colour code, e.g. #9175ec, and check the **Preview** on the right as you go.

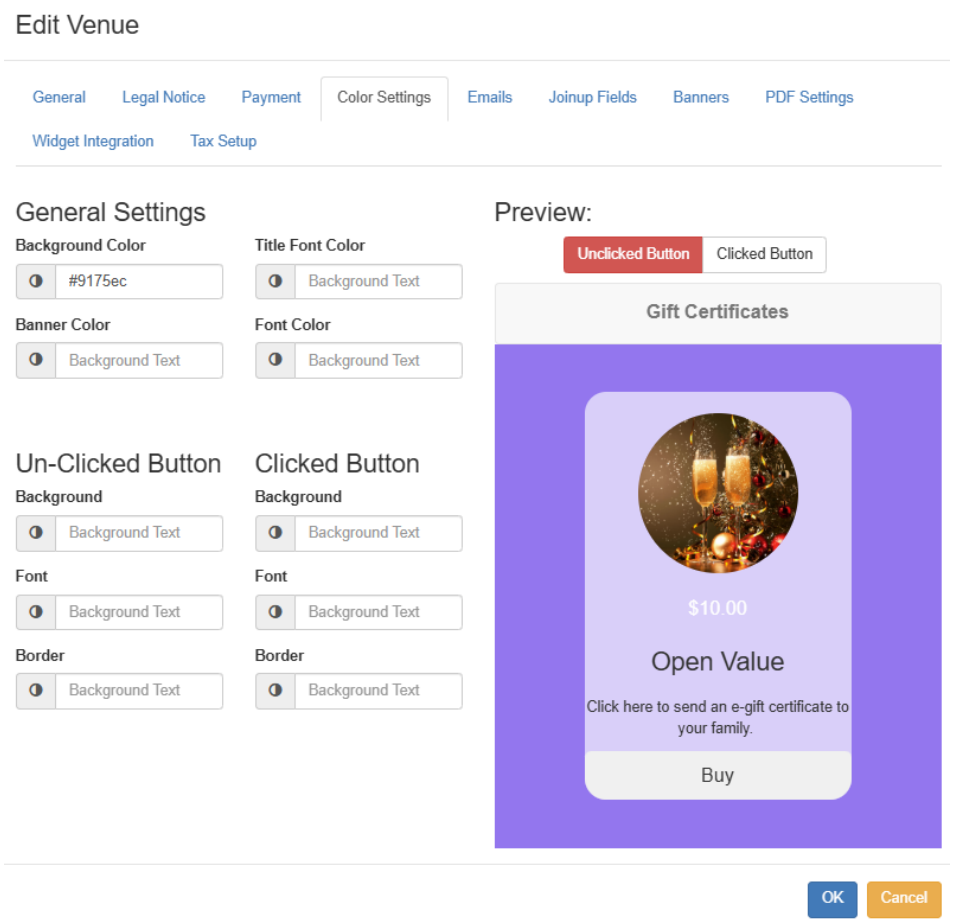


Figure 6. Edit Venue, Color Settings tab

Field	What it does
Background Color	The page background behind your vouchers
Title Font Color	Colour of the page title, e.g. “Gift Certificates”
Banner Color	Colour of the title banner at the top
Font Color	Colour of the general text
Un-Clicked Button: Background, Font, Border	How the **Buy** button looks before it is clicked
Clicked Button: Background, Font, Border	How the **Buy** button looks once clicked
Preview	Shows your colours on a sample voucher; switch between **Unclicked Button** and **Clicked Button** to check both

PDF Settings tab

The PDF Settings tab controls the header image and footer on every voucher PDF your customers receive.

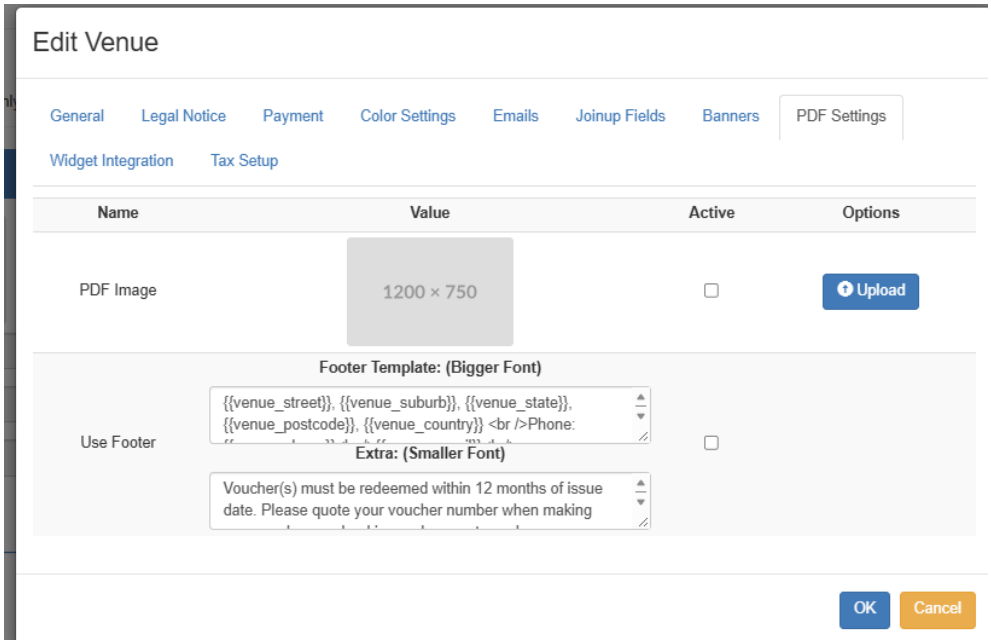


Figure 7. Edit Venue, PDF Settings tab

Field	What it does
PDF Image	The header image on the voucher PDF, 1200 x 750 px; click **Upload** to add it
PDF Image: Active	Tick to show the header image
Use Footer: Footer Template (Bigger Font)	The main footer line, usually your address and phone number
Use Footer: Extra (Smaller Font)	Small print, e.g. “Voucher(s) must be redeemed within 12 months of issue date”
Use Footer: Active	Tick to show the footer

The footer template uses placeholders such as {{venue_street}}, {{venue_suburb}}, {{venue_state}}, {{venue_postcode}} and {{venue_country}}. These are filled in automatically from the address on the General tab, so keep that address up to date.

Widget Integration tab

The Widget Integration tab gives you the link and website code for your voucher page. Click **Gift Certificates URL/Iframe** to open it.

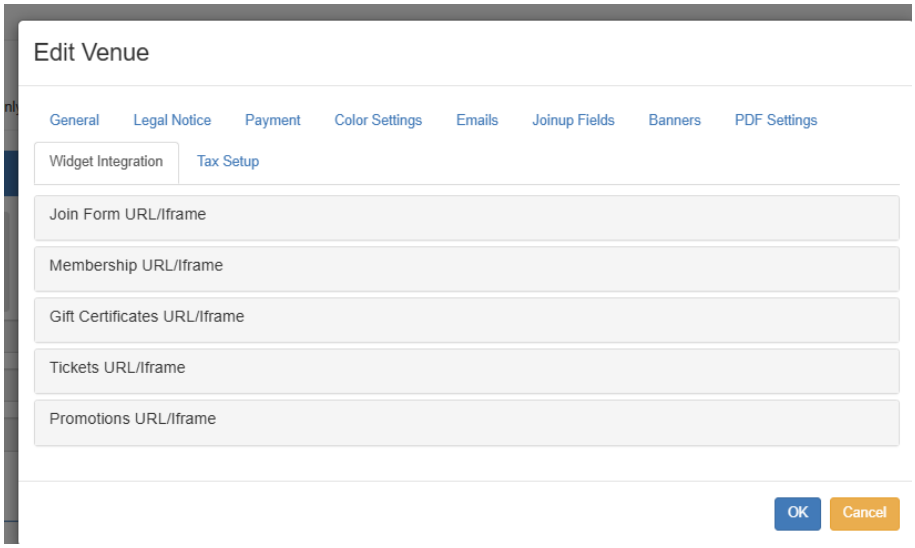


Figure 8. Edit Venue, Widget Integration tab

Field	What it does
Gift Certificates URL	A direct link to your voucher page for website buttons, social media and campaigns
Gift Certificates Iframe	Code your web designer pastes into your website to show the voucher page inside it

Join Form, Membership, Tickets and Promotions have their own links for those products.

Tax Setup tab

The Tax Setup tab lists the tax rates available to your venue. Check with Bepoz before changing a rate that is in use.

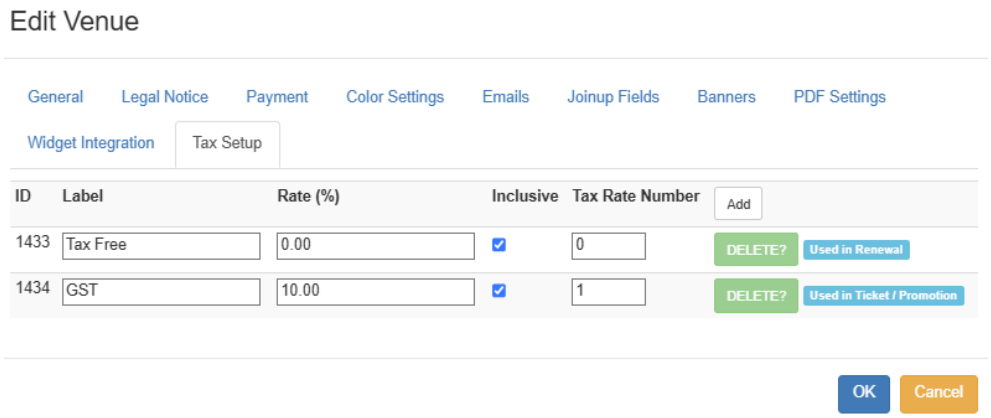


Figure 9. Edit Venue, Tax Setup tab

Field	What it does
ID	The tax rate's ID in EzyOffice
Label	The tax name, e.g. "GST" or "Tax Free"
Rate (%)	The tax percentage, e.g. 10.00
Inclusive	Tick if prices already include this tax
Tax Rate Number	The matching tax rate number in your Bepoz POS
Add	Adds a new tax rate
DELETE?	Removes a tax rate
Used in …	Shows where a tax rate is in use, e.g. "Used in Ticket / Promotion"

Step 2: Create a gift certificate

Each gift certificate you create appears for sale on your voucher page. You can create as many as you like, e.g. $50, $100 and an open-value voucher.

1. Log in to the Bepoz EzyOffice Client Portal.
2. In the left menu, click **Gift Certificates**.

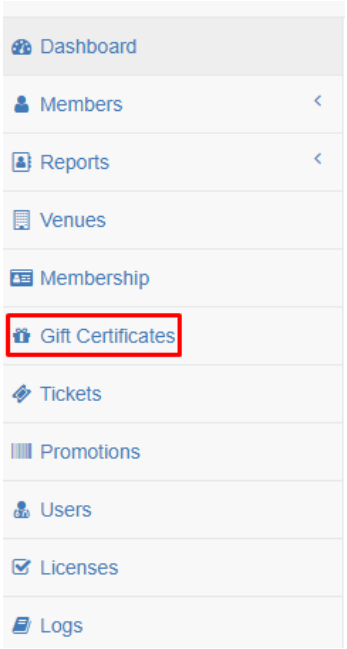


Figure 10. Gift Certificates in the left menu

3. Click **Add Gift Certificate** at the top right.

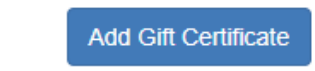


Figure 11. Add Gift Certificate button

4. Fill in the **New Gift Certificate** form using the field guide below.
5. Click **OK** to save, or **Cancel** to discard.

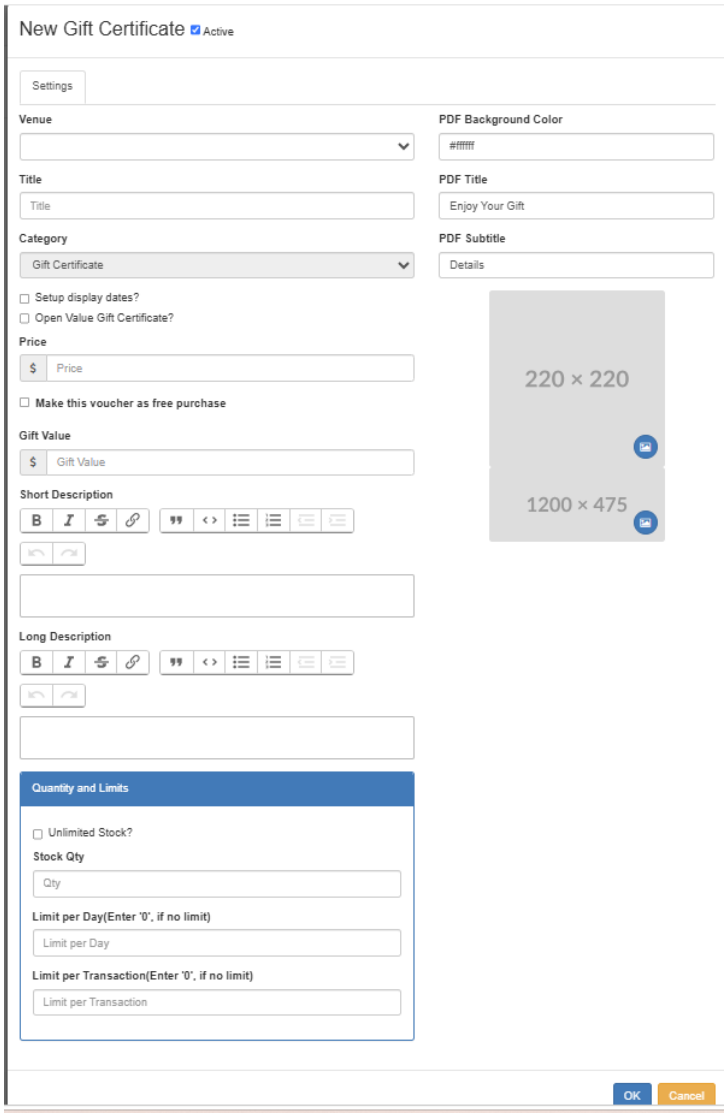


Figure 12. New Gift Certificate form

Gift certificate fields

Field	What it does
Active	Tick to put this gift certificate on sale; untick to hide it from your voucher page
Venue	The venue that sells this gift certificate
Bepoz Voucher Setup	Appears once a venue is chosen. The voucher type in your Bepoz POS that this gift certificate creates; Bepoz sets these up for you
Title	The name customers see, e.g. “$50 Gift Certificate”
Category	The type of voucher; leave as **Gift Certificate**
Setup display dates?	Tick to show the gift certificate only between a start and end date, e.g. for Mother’s Day

Field	What it does
Open Value Gift Certificate?	Tick to let customers choose their own amount instead of a fixed price
Price	The amount the customer pays
Make this voucher as free purchase	Tick to offer it at no charge, e.g. complimentary or test vouchers
Gift Value	The value loaded on the voucher and redeemed at the till; usually the same as Price
Short Description	A brief summary shown with the gift certificate on your voucher page
Long Description	Full details shown when the customer opens the gift certificate, e.g. where it can be used
PDF Background Color	Background colour of the voucher PDF, as a colour code, e.g. #ffffff for white
PDF Title	Heading printed on the voucher PDF; default “Enjoy Your Gift”
PDF Subtitle	Sub-heading printed on the voucher PDF; default “Details”
Square image (220 x 220 px)	Small image for the gift certificate; click the image icon to upload
Banner image (1200 x 475 px)	Wide image for the gift certificate; click the image icon to upload
Unlimited Stock?	Tick if there is no limit on how many can be sold
Stock Qty	How many can be sold in total, when stock is limited
Limit per Day	Most that can be sold in one day; enter 0 for no limit
Limit per Transaction	Most one customer can buy in one purchase; enter 0 for no limit

Tip: setting **Limit per Transaction** helps protect you from fraudulent card purchases (see Keeping it safe).

Step 3: Edit a gift certificate and view its sales

After you save, the gift certificate appears as a tile on the Gift Certificates page.

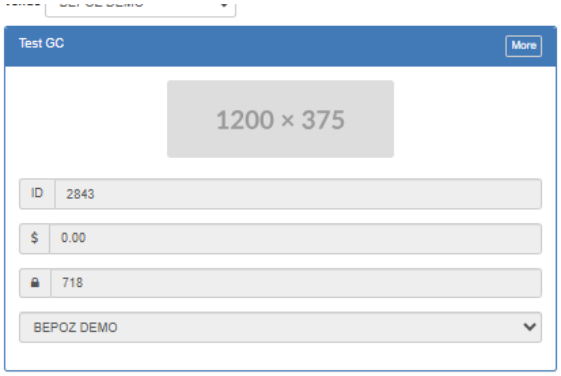


Figure 13. Gift certificate tile

Tile item	What it shows
Title bar	The gift certificate's name, with the **More** button
Image	The banner image you uploaded
ID	The gift certificate's ID in EzyOffice
$	The price
Lock icon	The linked Bepoz reference
Venue	The venue selling it

To change a gift certificate:

1. Click **More** on its tile to open **Edit Gift Certificate**.
2. On the **Settings** tab, update any field (see the field guide in Step 2).
3. Click **OK** to save.

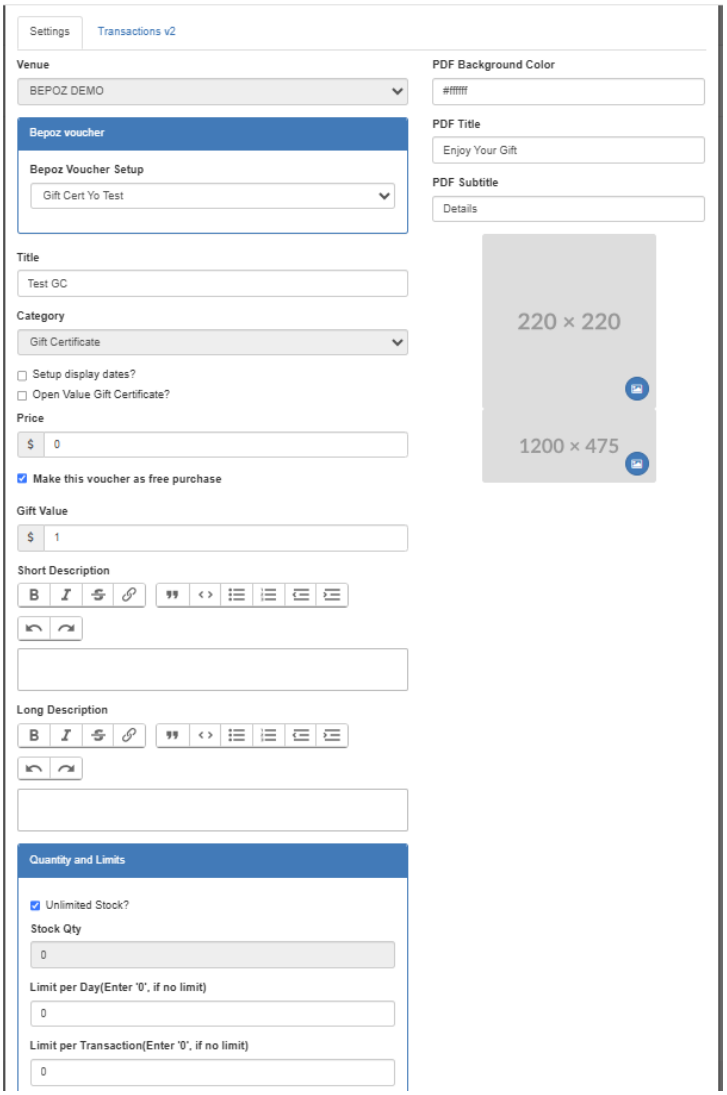


Figure 14. Edit Gift Certificate, Settings tab

To see who bought it, open the **Transactions v2** tab in the same window.

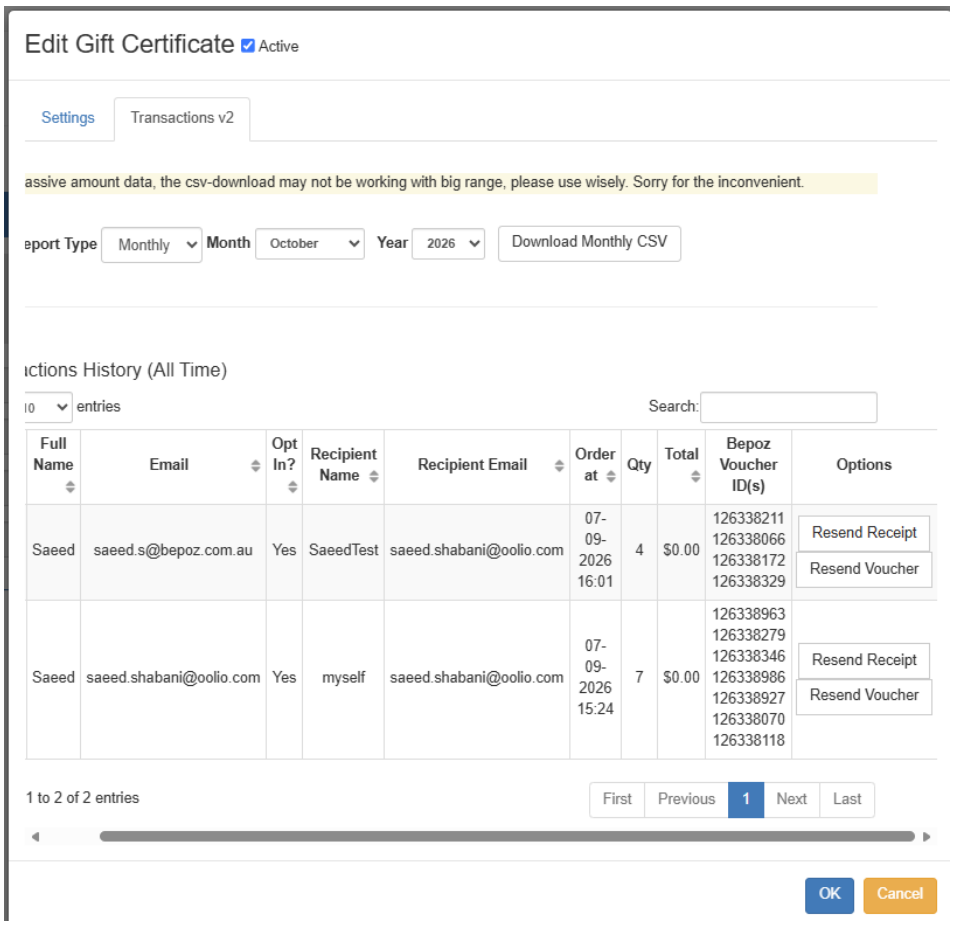


Figure 15. Transactions v2 tab

Function	What it does
Report Type, Month, Year	Choose the period to download
Download Monthly CSV	Downloads that period's sales as a spreadsheet; keep the date range small for busy periods
Transactions History (All Time)	Every purchase of this gift certificate, newest at the top
Search	Find a purchase by name or email
Full Name, Email	The buyer's details
Opt In?	Whether the buyer agreed to receive marketing
Recipient Name, Recipient Email	Who the voucher was sent to
Order at	Date and time of purchase
Qty, Total	Number of vouchers bought and amount paid
Bepoz Voucher ID(s)	The voucher numbers created in your POS, one per voucher
Options	Resend Receipt and Resend Voucher (see below)

Resend a receipt or voucher

If a customer says their email did not arrive, you can send it again in a few clicks.

1. Ask the customer to check their junk or spam folder first.
2. Open the gift certificate's tile, click **More**, then open **Transactions v2**.
3. Use **Search** to find the purchase by the buyer's name or email.
4. In the **Options** column, click:
   - **Resend Receipt** to send the purchase receipt to the buyer again.
   - **Resend Voucher** to send the voucher PDF to the recipient again.
5. If the email still does not arrive, check that the email address in the purchase is correct, then contact Bepoz support.

Reports: Daily Summary

The Daily Summary report shows every gift certificate purchase across your venues, grouped by period, with totals.

1. In the left menu, click **Reports**, then **Daily Summary**.
2. Choose the **Select Report Type**, period, venue and voucher.
3. Click **Generate Report** to view it on screen, or **Export CSV** to download it as a spreadsheet.

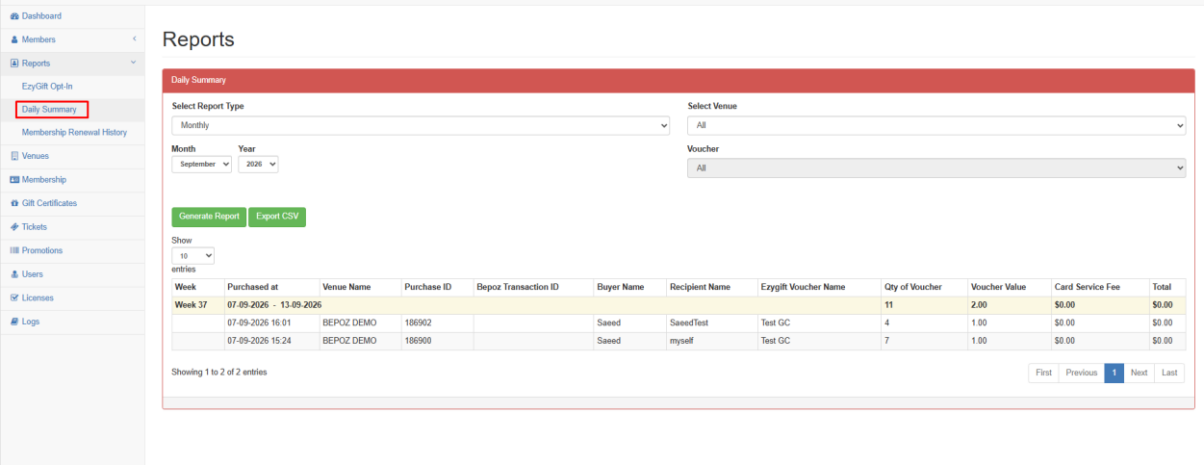


Figure 16. Daily Summary report

Select Report Type offers four options.

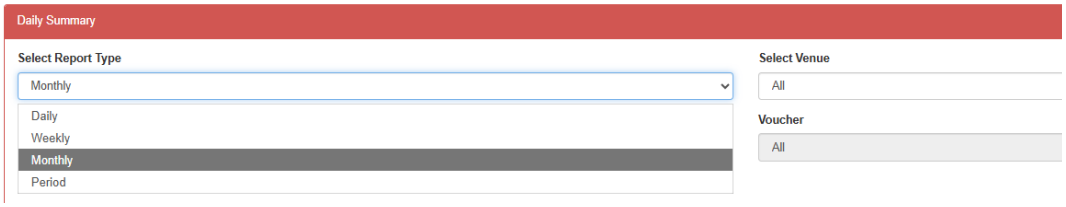


Figure 17. Report type options

Report filters

Function	What it does
Select Report Type	**Daily**, **Weekly**, **Monthly** or **Period** (a custom date range)
Month, Year	The period to report on (changes with the report type)
Select Venue	One venue, or **All**
Voucher	One gift certificate, or **All**
Generate Report	Shows the report on screen
Export CSV	Downloads the report as a spreadsheet

Report columns

Column	What it shows
Week	The week number, with a subtotal row for that week
Purchased at	Date and time of purchase
Venue Name	The venue that sold the voucher
Purchase ID	The EzyOffice purchase reference
Bepoz Transaction ID	The matching transaction in your Bepoz POS
Buyer Name, Recipient Name	Who bought it and who received it
Ezygift Voucher Name	The gift certificate's title
Qty of Voucher	Number of vouchers in the purchase
Voucher Value	Value of each voucher
Card Service Fee	Any card processing fee charged to the customer
Total	Amount paid

The **EzyGift Opt-In** report, also under Reports, lists buyers who agreed to receive marketing.

Keeping it safe

Every payment is screened by Stripe's built-in fraud protection, and vouchers can only be redeemed at your venue. A few simple habits reduce risk further:

- Limit how many vouchers of each value one customer can buy.
- Avoid offering $5 vouchers, a common amount for testing stolen cards.
- Check Stripe for unusual activity, such as repeated overseas cards.
- Refund any suspicious payment in Stripe using **Refund as fraud**.

Refunds for online vouchers are made through Stripe, not at the till.

What we need from you

- ☐ Ask your IT provider to open the network port to your Bepoz server (we will send the details).
- ☐ Create your Stripe account and enter your Stripe Connected ID (starts with acct_) on the Payment tab.
- ☐ Send us your logo, brand colours and voucher images.
- ☐ Ask your web designer to add the voucher page to your website.
- ☐ Book and attend your training session with Bepoz.

Questions? Contact the Bepoz support team.