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USER MANUAL

EzyOffice – Ezyrenewal

Membership Renewal Setup Guide

For venue owners and managers

Version 1.1 | October 2026

Prepared by Bepoz
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Introduction

Ezyrenewal lets your members join or renew their Bepoz membership online, any time of day. Each payment is written into your Bepoz system automatically, so the member's new expiry date is updated without any manual entry by your staff. This manual shows venue owners and managers how to set up and manage Ezyrenewal themselves in the EzyOffice Client Portal.

What Ezyrenewal does

Ezyrenewal gives your venue its own online membership page, in your branding. Members sign in with their card or account number and email address, see their current membership, choose a renewal option and pay by credit card, Apple Pay or Google Pay. The whole process normally takes two to four minutes. Payments are taken through Oolio Pay.

Members can also switch on **Auto Renewal** so their membership renews automatically with a saved credit card, and venues using the **MyPlace** app can let members open Ezyrenewal straight from the app without logging in again.

Who uses it

Who	What they do
Venue owner or manager	Manages renewal options, prices, terms, reminders and tax; reviews renewals in the reports
Front-of-house staff	Answer member questions and resend receipts
Your web designer	Adds the membership page link or embed to your website
Your IT provider	Helps Bepoz if needed while the secure Cloudflare connection to your Bepoz server is set up (one-off; no port forwarding)
Your members	Join or renew online and receive a receipt by email
Bepoz	Sets everything up, trains your team and provides support

The main parts

Part	What it is for	Who uses it
Membership page	Your online join and renewal page, in your branding	Members
EzyOffice Client Portal	Manage renewal options, terms, reminders and reports	Owner or manager

Part	What it is for	Who uses it
Oolio Pay	Takes card, Apple Pay and Google Pay payments	Owner or manager
Renewal emails	A receipt with a Tax Invoice PDF, and reminders before expiry	Members
Bepoz POS	Holds each membership and its expiry date	Staff
Website link or embed	Places the membership page on your website and social media	Web designer
MyPlace app (optional)	Opens the membership page from your MyPlace app, already signed in	Members

How it works

A renewal bought online goes into your Bepoz system automatically.

1. The member opens your membership page and signs in with their card or account number, email address and a one-time code.
2. They choose a renewal or join option and pay.
3. Oolio Pay takes the payment.
4. The renewal is posted to Bepoz and the member's expiry date moves forward.
5. The member receives a receipt email with their Tax Invoice.

Important: Members must have an email address in their Bepoz account to sign in. If your Ezyrenewal licence is inactive, has expired or has been revoked, your membership page shows **Error 403** and members cannot use it; contact the Bepoz support team.

Step 1: Set up your venue settings

Your venue settings control the terms members accept, how they pay, the emails they receive and the link to your membership page. Bepoz completes the POS connection during installation; you can manage the rest.

1. Log in to the **Bepoz EzyOffice Client Portal** (https://join-admin.vecport.net).
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.

Ezyrenewal uses these tabs: **General**, **Legal Notice**, **Payment**, **Emails**, **Widget Integration** and **Tax Setup**.

General tab

The General tab holds the two Bepoz products that Ezyrenewal sales are posted to.

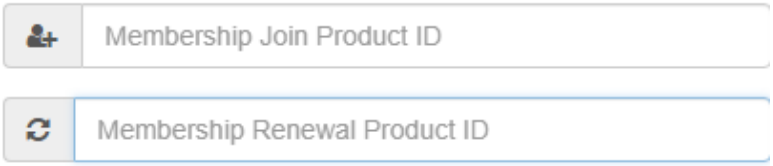


Figure 1. Edit Venue, General tab – membership product IDs

Field	What it does
Membership Join Product ID	The Bepoz product used for join fees; set by Bepoz, please don't change
Membership Renewal Product ID	The Bepoz product used for renewal fees; set by Bepoz, please don't change

Legal Notice tab

The Legal Notice tab holds the membership terms members accept before they pay.

Field	What it does
Membership Terms & Conditions	The terms that apply to your memberships; links are supported
Pop up Membership T&C?	Tick to show your terms in a pop-up after the member selects an option. Untick to show an "I agree to the Terms and Conditions" tick box on the main page instead, which the member must tick before choosing an option

Payment tab (Oolio Pay)

Ezyrenewal takes payments through Oolio Pay. Stripe is used for Ezygift only.

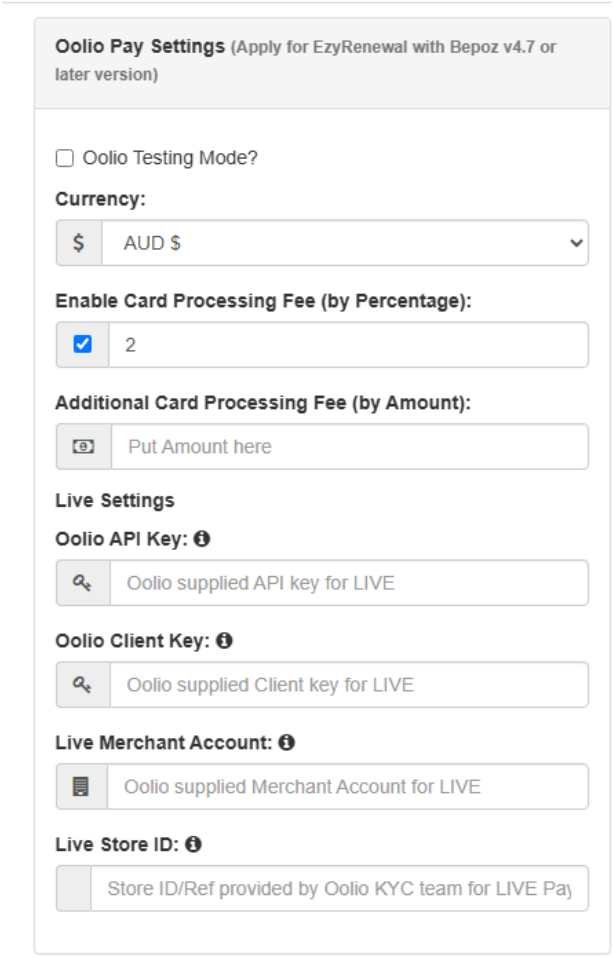


Figure 2. Edit Venue, Payment tab – Oolio Pay Settings

Field	What it does
Oolio Testing Mode?	Tick to test without real charges; untick to go live
Currency	The currency members pay in, e.g. AUD $
Enable Card Processing Fee (by Percentage)	Tick to add a percentage card fee to each payment
Additional Card Processing Fee (by Amount)	A fixed card fee added to each payment
Oolio API Key, Client Key, Live Merchant Account, Live Store ID	Your live Oolio Pay details; entered by Bepoz after Oolio approves your account

Card fees charged to the member appear in the **Service Fee** column of the Membership Renewal History report.

Emails tab

The Emails tab has six Ezyrenewal emails: two for normal renewal and four for Auto Renewal.

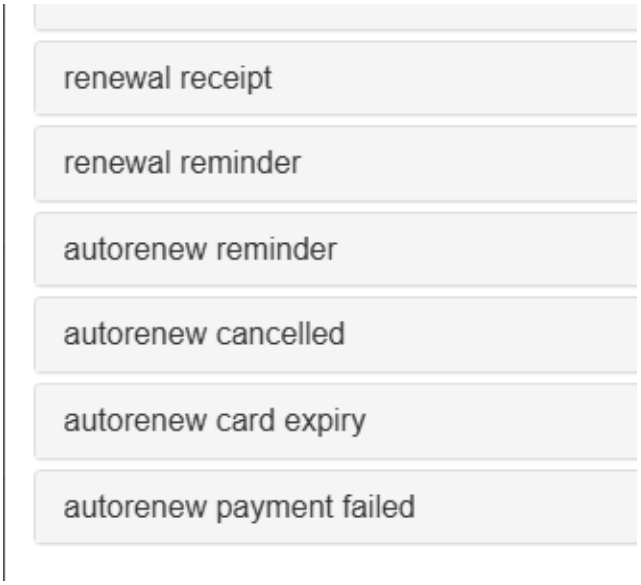


Figure 3. Edit Venue, Emails tab – normal renewal and Auto Renewal emails

Email	When it is sent
renewal receipt	After every successful payment, manual or automatic, with a link to the Tax Invoice PDF
renewal reminder	Before a membership expires, for members not on Auto Renewal
autorenew reminder	Before an automatic payment, with the amount and the date the card will be charged
autorenew cancelled	When Auto Renewal is cancelled by the member or by the system
autorenew card expiry	When the saved card has expired or is invalid
autorenew payment failed	When an automatic payment is declined

Each email has these settings:

Field	What it does
Active	Tick to send that email
Sender Name	The sender name members 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.

Widget Integration tab

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

Field	What it does
Membership URL	A direct link to your membership page for website buttons, emails, QR codes and social media
Membership Iframe	Code your web designer pastes into your website to show the membership page inside it

Tax Setup tab

The Tax Setup tab lists the tax rates available to your venue, e.g. GST 10.00% and GST FREE 0.00%. Each membership renewal uses one of these rates (see Step 2). Check with Bepoz before changing a rate that is in use.

Step 2: Create a membership renewal

Each membership renewal you create appears as an option on your membership page, e.g. “Gold 12 Month Renewal” or “Silver Join 2027”. Each one is linked to a renewal already set up in your Bepoz POS.

1. Log in to the **Bepoz EzyOffice Client Portal**.
2. In the left menu, click **Membership**.
3. Click **+ Add Renewal** at the top right.
4. Select the **Venue**, then choose the Bepoz renewal to offer. Renewals that have already ended in Bepoz are not listed.
5. Fill in the **New Membership Renewal** form using the field guide below, then open the **Tax Setup** tab.
6. Click **Save Configuration** to save, or **Cancel** to discard.

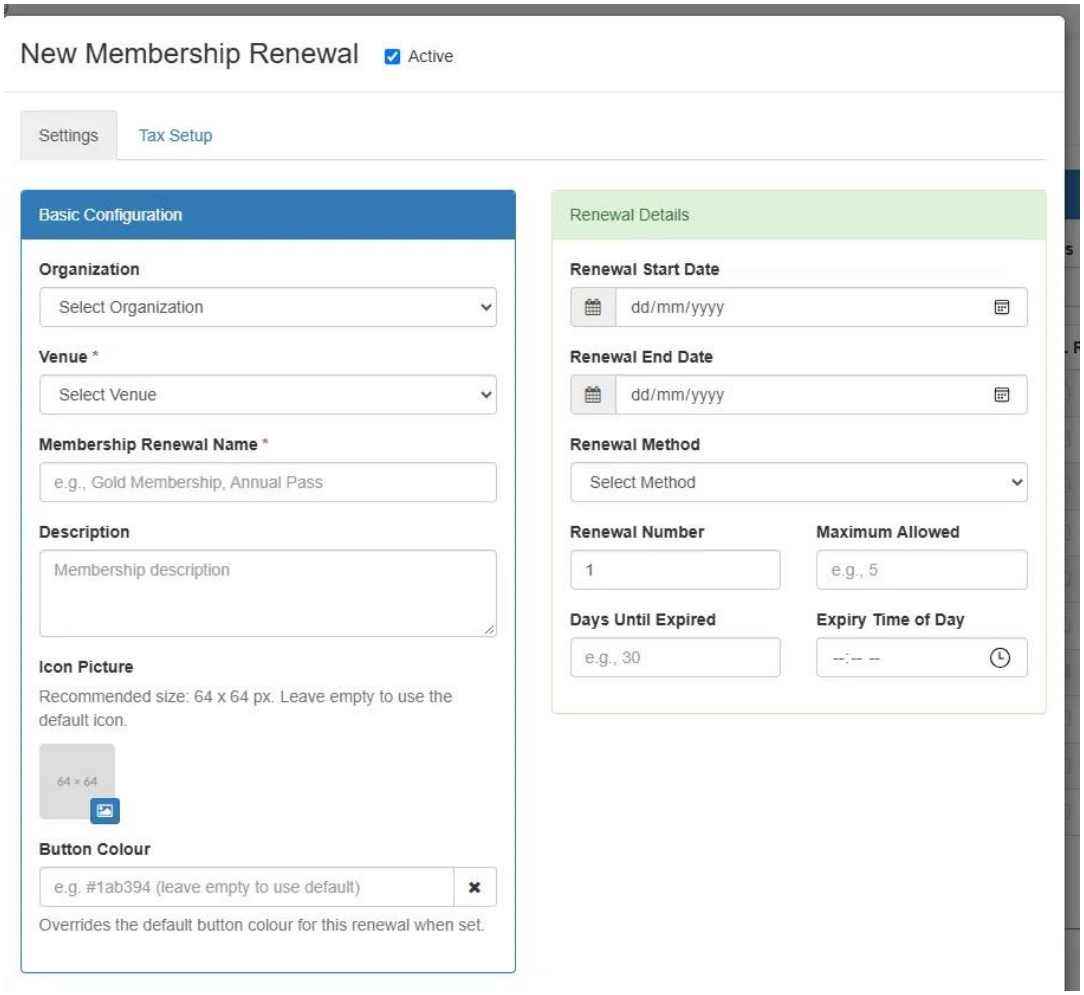


Figure 4. New Membership Renewal, Settings tab

Basic Configuration fields

Field	What it does
Active	Tick to put this renewal on sale; untick to hide it from your membership page
Venue	The venue that sells this renewal
Membership Renewal Name	The name members see, e.g. “Gold Membership”; also printed on the receipt
Description	A short description shown with the option
Icon Picture	Small image for the option button, 64 x 64 px; leave empty to use the default icon
Button Colour	Colour code for this option’s button, e.g. #1ab394; leave empty to use the default

Renewal Details fields

These come from your Bepoz renewal setup and are read only. To change them, update the renewal in Bepoz.

Field	What it does
Renewal Start Date, Renewal End Date	The period this renewal can be bought; after the end date it is hidden from members automatically
Renewal Method	How the new expiry date is worked out: Exact Date, Number of Days, Weeks, Months, Years or Hours, Today Only or Perpetual. All methods can be renewed online; Auto Renewal works with Number of Days, Weeks, Months and Years only
Renewal Number (or Days, Months…)	How many units are added, e.g. 12 months
Maximum Allowed	The most renewals a member can buy in advance
Days Until Expired, Expiry Time of Day	Extra expiry rules set in Bepoz

Pricing Configuration fields

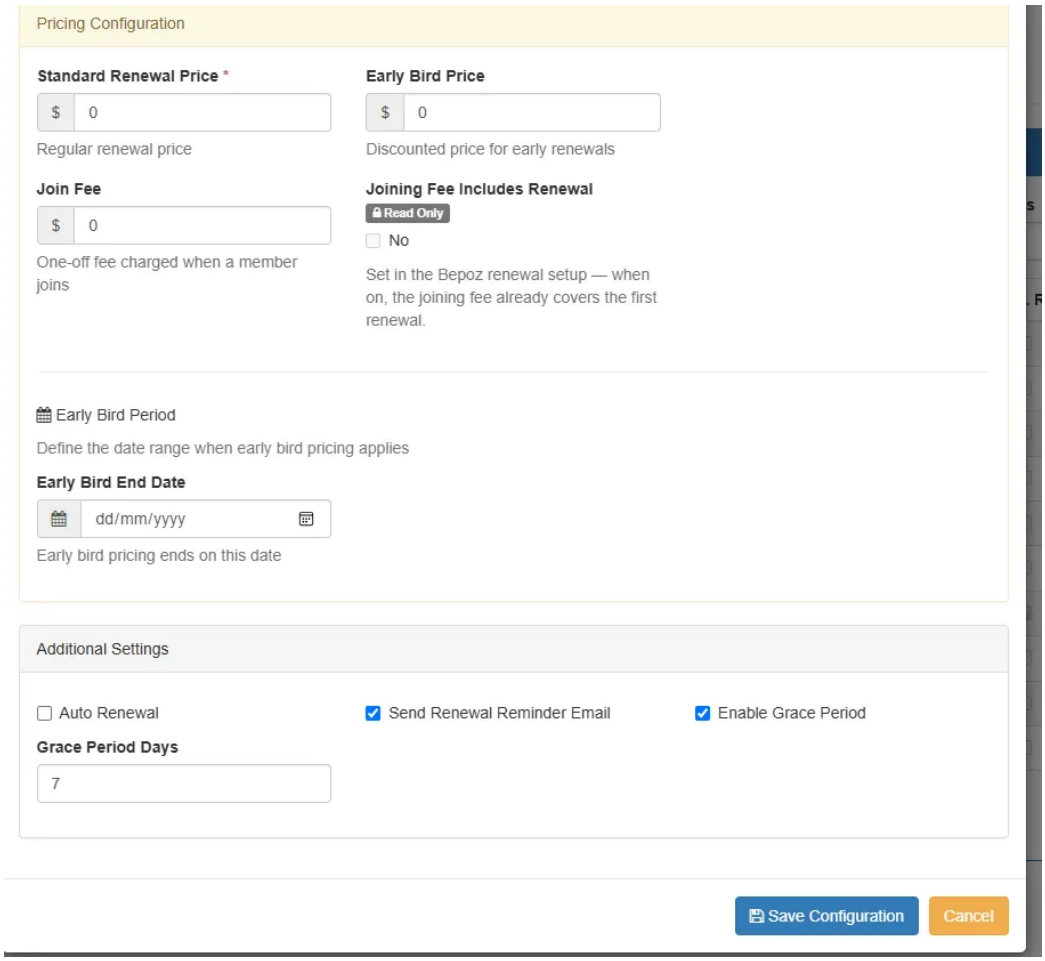


Figure 5. Pricing Configuration and Additional Settings

Field	What it does
Standard Renewal Price	The normal renewal price; filled in from Bepoz and can be adjusted
Early Bird Price	A discounted price charged until the Early Bird End Date
Join Fee	One-off fee charged when a new member joins
Joining Fee Includes Renewal	Read only, set in Bepoz; when Yes, the join fee already covers the first renewal
Early Bird End Date	The last day the early bird price applies; optional

Additional Settings fields

Field	What it does
Auto Renewal	Tick to let members renew automatically with a saved credit card. Only available when the Renewal Method is Number of Days, Weeks, Months or Years (see Step 5)
Send Renewal Reminder Email	Tick to send reminders to members on this membership (timing is set in Step 4)
Enable Grace Period	Tick to let members renew at the standard price after expiry
Grace Period Days	How many days after expiry the grace period lasts

Tax Setup tab

Switch **ON** exactly one tax option, matching the tax on the renewal product in Bepoz.

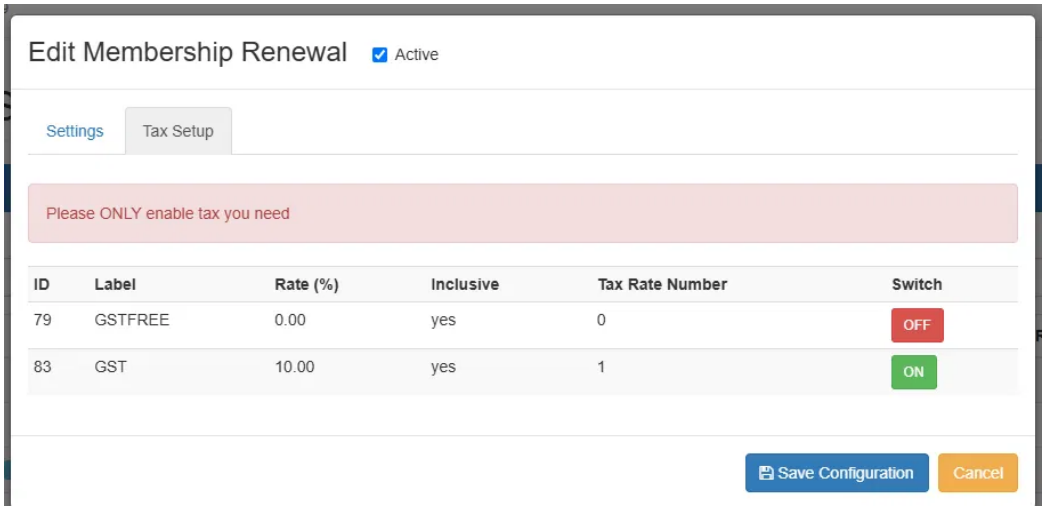


Figure 6. New Membership Renewal, Tax Setup tab

Message	What to do
Please select ONE Tax option	No tax option is on; switch one on
One tax option support only	More than one option is on; switch all but one off

Step 3: Edit a membership renewal

After you save, the renewal appears in the list on the Membership page.

1. Click the edit icon at the end of the record to open **Edit Membership Renewal**.
2. Update the name, description, icon, button colour, prices, additional settings or tax (see the field guide in Step 2).
3. Click **Save Configuration**.

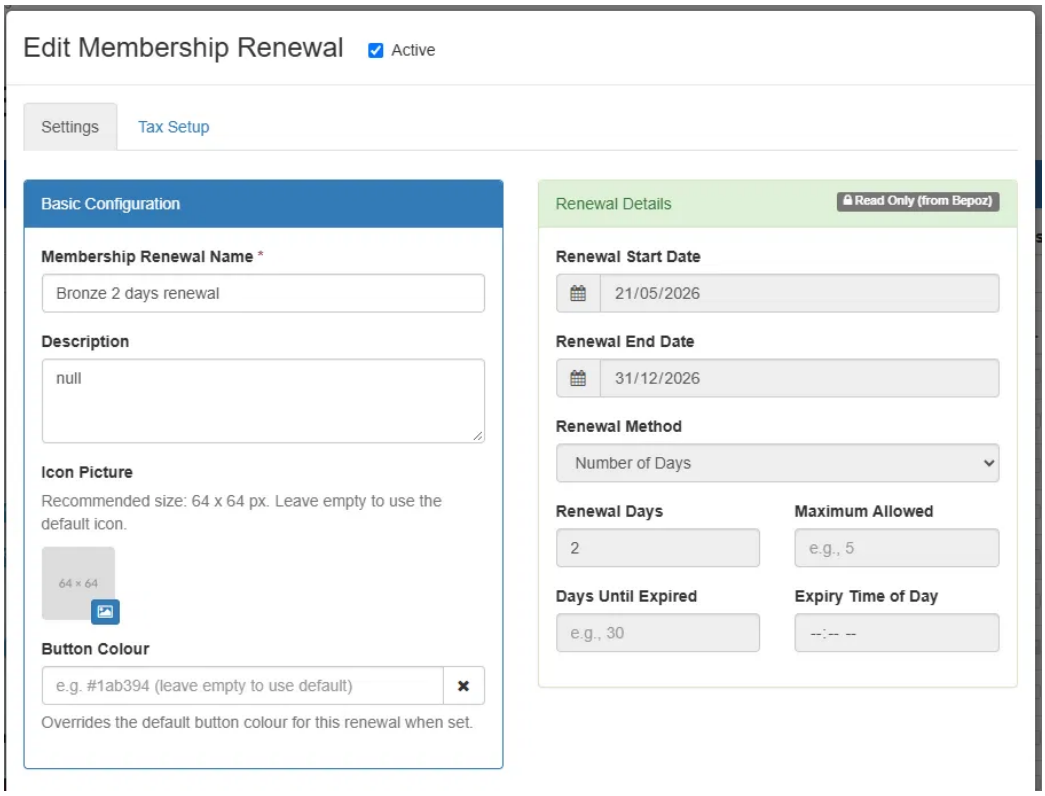


Figure 7. Edit Membership Renewal – Renewal Details are read only (from Bepoz)

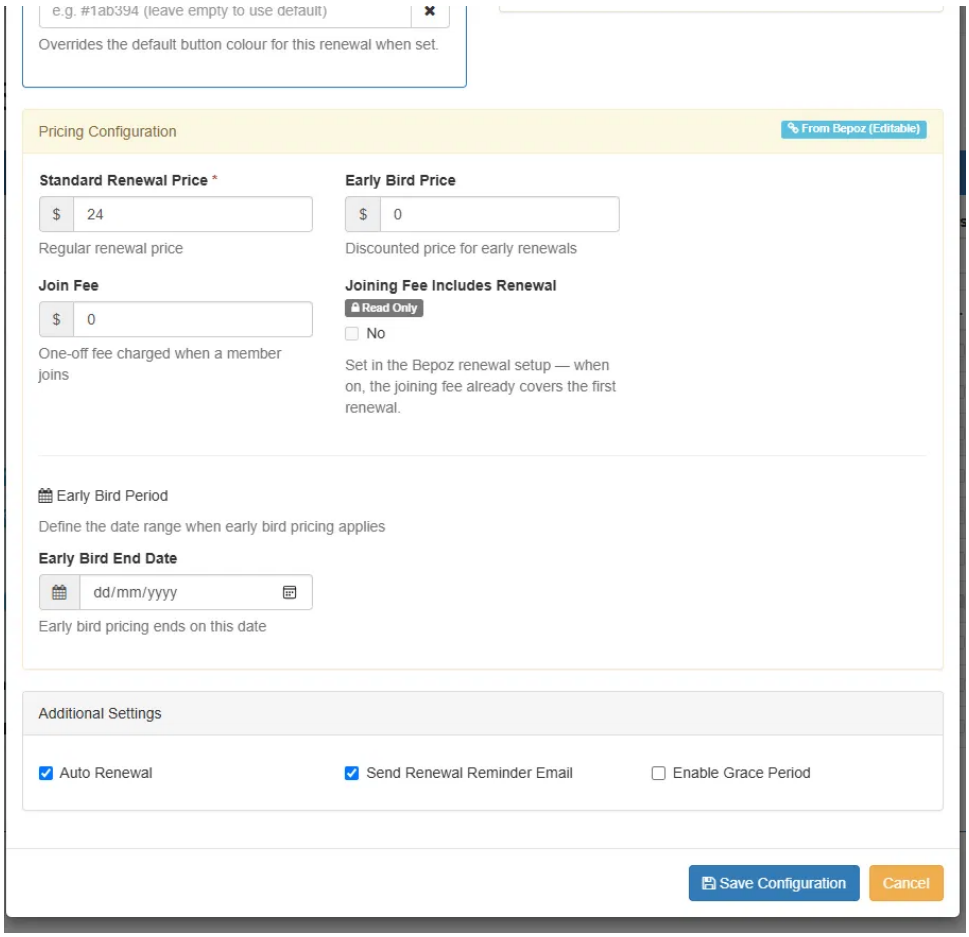


Figure 8. Edit Membership Renewal – pricing from Bepoz (editable)

When a renewal's end date passes, it is made **inactive** automatically, hidden from members, moved to the bottom of the list and highlighted in pink. If you try to add a renewal that has already ended, you will see "This renewal is already expired. Please choose another renewal option."

Tip: Before each new membership year, create the new renewal in Bepoz and add it here, so members always have a current option to buy.

Step 4: Set up renewal reminders

Reminder settings control when renewal reminder emails are sent. They are in the Membership section of the Client Portal.

Field	What it does
Reminder Days Before Expiry	How many days before each member's expiry date the reminder is sent
Send Reminders At (time)	The time of day reminders are sent
Include direct renewal link in reminder emails	Tick to add the renewal link to each reminder; untick to use your own website link in the email template
Show early bird pricing info when applicable	Tick to include the early bird price in the reminder
Grace Period Reminders (Days After Expiry)	Sends reminders after the membership has expired
Maximum Grace Period Days	Members can still renew at the standard price within this period
Skip members who opted out of marketing emails	Tick to skip members who opted out
Skip members with auto-renewal enabled	Tick to skip members on Auto Renewal

Step 5: Offer Auto Renewal

Auto Renewal lets members renew automatically with a saved credit card, so their membership never lapses. You choose which membership renewals offer it; each member then decides whether to switch it on.

Supported renewal methods

Ezyrenewal supports every Bepoz renewal method for normal online renewals. Auto Renewal works with these four only:

Renewal Method (Bepoz)	Online renewal	Auto Renewal
Number of Days	Yes	Yes
Number of Weeks	Yes	Yes
Number of Months	Yes	Yes
Number of Years	Yes	Yes
Exact Date	Yes	No
Number of Hours	Yes	No
Today Only	Yes	No
Perpetual	Yes	No

Turn on Auto Renewal

1. In the left menu, click **Membership**, then click the edit icon on the renewal.
2. Check the **Renewal Method** under Renewal Details is Number of Days, Weeks, Months or Years.
3. Under **Additional Settings**, tick **Auto Renewal**.
4. Click **Save Configuration**.

Members only see the Auto Renewal option when the renewal is active and there is enough time left before its Bepoz end date for another full renewal. For example, a monthly renewal ending 31/12/2026 can offer Auto Renewal in May, but a yearly renewal ending on the same date cannot.

How Auto Renewal works

When	What happens
Member switches it on	The member ticks Auto Renewal when paying by credit card. Their card is saved securely for future renewals; Apple Pay and Google Pay are not available for Auto Renewal

When	What happens
Before each renewal	The member is emailed with the amount and the date their card will be charged
Renewal day	The card is charged automatically the day before the membership expires, the renewal is posted to Bepoz and the new expiry date is set
After payment	The member receives the Renewal receipt email with their Tax Invoice
Payment declined	The payment is retried later the same day and the member is emailed. If you have a grace period, it is retried again over the following days. If it still fails, Auto Renewal is cancelled and the member renews manually
Card expired or invalid	Payments are paused and the member is emailed to update their card
Renewal period nearly ending	When the Bepoz renewal is close to its end date, Auto Renewal is cancelled for its members and they are emailed to choose a new option

Auto Renewal emails

Email	When it is sent
autorenew reminder	Tells the member how much will be charged and when
autorenew cancelled	Sent when the member or the system cancels Auto Renewal
autorenew card expiry	Sent when the saved card has expired or is invalid, asking the member to update it
autorenew payment failed	Sent when an automatic payment fails, asking the member to renew manually or update their card

These are set up in the Emails tab (Step 1). Keep all four ticked **Active** if you offer Auto Renewal.

Tip: Tick **Skip members with auto-renewal enabled** in Reminder settings (Step 4) so members on Auto Renewal don't also receive manual renewal reminders.

What your members see

This helps you and your staff answer member questions.

Renewing a membership

1. The member opens your membership page and chooses **Membership Renewal**.
2. They enter their **card or account number** and the **email address** held in Bepoz.
3. A **one-time passcode** is emailed to them; they enter it to continue.
4. The main page shows their details, current membership and expiry date, and the options available to them.
5. They accept your terms, choose an option and pay by **credit card, Apple Pay or Google Pay**.
6. A confirmation page shows their name, invoice number and new expiry date. Pressing **OK** signs them out.
7. They receive the **Renewal receipt** email with a link to their Tax Invoice PDF.

Joining for the first time

A new member chooses **Membership Sign Up**, completes the join form (which creates their account in Bepoz), confirms with a one-time code, and returns to choose a join option.

Auto Renewal

- Where you allow it, the member can tick **Auto Renewal** when paying, using a credit card only.
- Their main page then shows only their auto-renewal option, labelled **Auto renewal**. They can update the saved card (only the last four digits are shown) or click **Cancel Auto Renewal** and confirm **Yes**; all options then show again.
- In their **Profile**, **Payment Methods** lists their saved cards. They can choose the default card and delete a card, but not the card Auto Renewal is using until another card is set as default.
- Members are emailed before each automatic payment, after it succeeds, and if it fails or their card needs updating.

Option: Open Ezyrenewal from the MyPlace app

If your venue uses the **MyPlace** app, members can open your membership page straight from the app. Bepoz connects the app to Ezyrenewal for you.

1. The member signs up or logs in to the MyPlace app.
2. They tap the membership link button in the app, which opens your Ezyrenewal page.
3. MyPlace securely passes the member's details to Ezyrenewal, so they don't need to log in again and go straight to the Ezyrenewal main page.

Member	What they see
Not yet linked to a Bepoz membership	The **Join membership** option, so they can join one of your memberships
Already a member	The **renewal options** for their current membership type

After they pay, the join or renewal is recorded in Bepoz as normal and the member receives their receipt by email.

Tip: If a member registered on your membership page first and downloads MyPlace later, MyPlace recognises their email address and links the same account.

Resend a receipt

If a member says their receipt did not arrive, you can send it again.

1. Ask the member to check their junk or spam folder first.
2. In the left menu, click **Reports**, then **Membership Renewal History**.
3. Generate the report for the day of the purchase and find the member.
4. In the **Options** column, click **Resend Receipt**.
5. If the email still does not arrive, check the email address in the member's Bepoz account, then contact Bepoz support.

Reports: Membership Renewal History

The Membership Renewal History report shows every online join and renewal, with fees and tax.

1. In the left menu, click **Reports**, then **Membership Renewal History**.
2. Choose the **Select Report Type**, date, venue and membership group.
3. Click **Generate Report** to view it on screen, or **Export CSV** to download it as a spreadsheet.

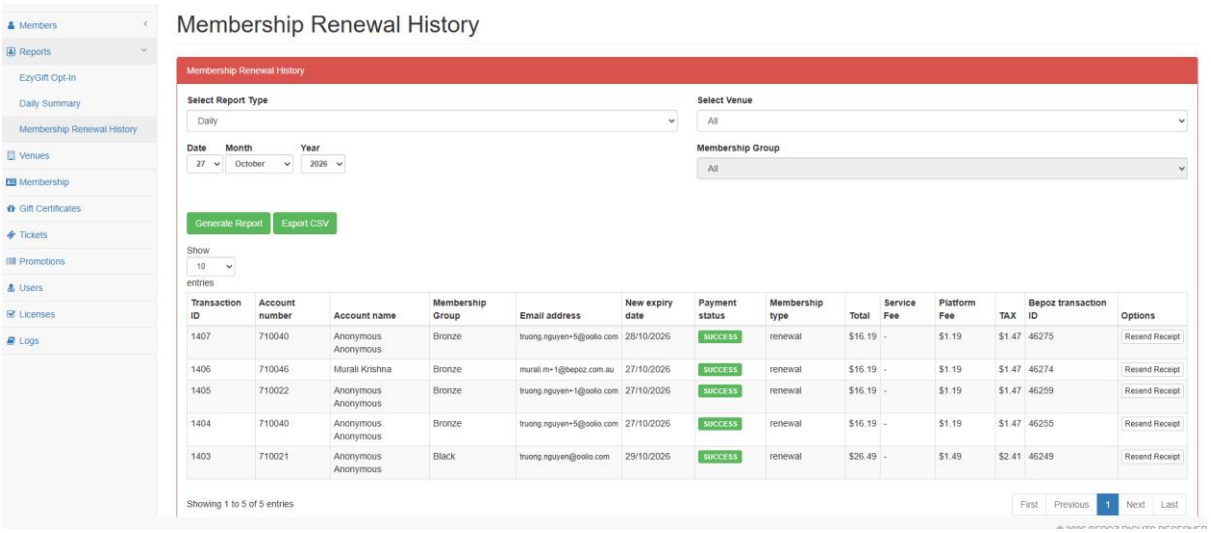


Figure 9. Membership Renewal History report

Report filters

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

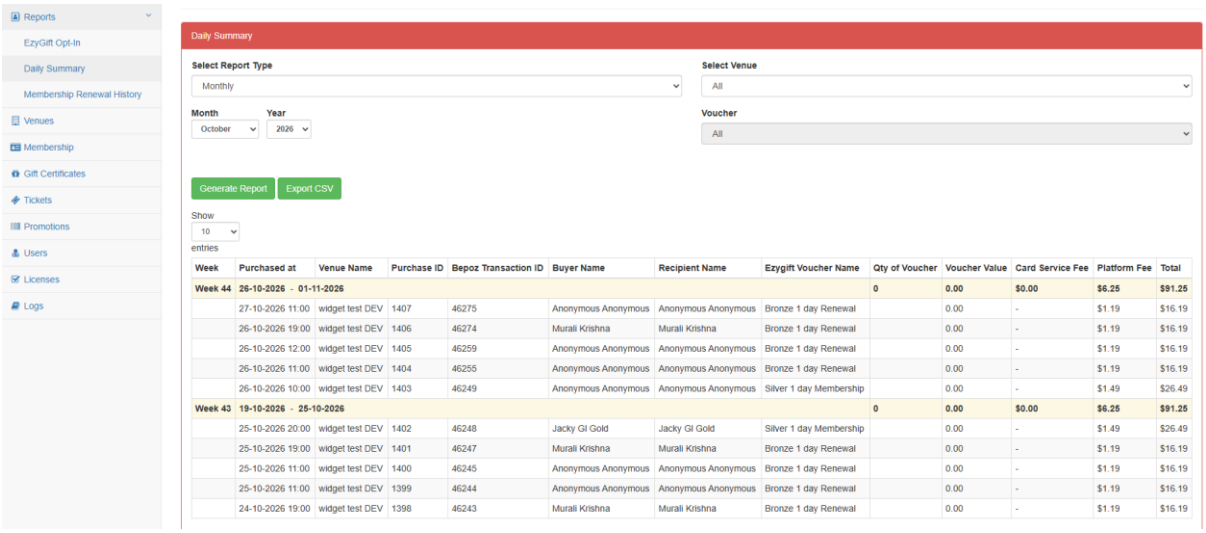
Report columns

Column	What it shows
Transaction ID	The EzyOffice transaction reference (matches Purchase ID in Daily Summary)
Account number, Account name	The member's Bepoz account

Column	What it shows
Membership Group	The member's membership, e.g. Gold, Silver, Bronze
Email address	Where the receipt was sent
New expiry date	The expiry date written to Bepoz
Payment status	SUCCESS for completed payments
Membership type	Renewal or join
Total	Amount paid
Service Fee, Platform Fee, TAX	Card fee, EzyOffice platform fee and tax included in the total
Bepoz transaction ID	The matching transaction in your Bepoz POS
Options	Resend Receipt

Reports: Daily Summary

Online renewals also appear in the Daily Summary report, grouped by week with subtotals. The renewal name shows in the Ezygift Voucher Name column, and Purchase ID matches the Transaction ID in Membership Renewal History.



Week	Purchased at	Venue Name	Purchase ID	Bepoz Transaction ID	Buyer Name	Recipient Name	Ezygift Voucher Name	Qty of Voucher	Voucher Value	Card Service Fee	Platform Fee	Total
Week 44	**26-10-2026 - 01-11-2026**							**0**	**0.00**	**$0.00**	**$6.25**	**$91.25**
	27-10-2026 11:00	widget test DEV	1407	46275	Anonymous Anonymous	Anonymous Anonymous	Bronze 1 day Renewal		0.00	-	$1.19	$16.19
	26-10-2026 19:00	widget test DEV	1406	46274	Murali Krishna	Murali Krishna	Bronze 1 day Renewal		0.00	-	$1.19	$16.19
	26-10-2026 12:00	widget test DEV	1405	46259	Anonymous Anonymous	Anonymous Anonymous	Bronze 1 day Renewal		0.00	-	$1.19	$16.19
	26-10-2026 11:00	widget test DEV	1404	46255	Anonymous Anonymous	Anonymous Anonymous	Bronze 1 day Renewal		0.00	-	$1.19	$16.19
	26-10-2026 10:00	widget test DEV	1403	46249	Anonymous Anonymous	Anonymous Anonymous	Silver 1 day Membership		0.00	-	$1.49	$26.49
Week 43	**19-10-2026 - 25-10-2026**							**0**	**0.00**	**$0.00**	**$6.25**	**$91.25**
	25-10-2026 20:00	widget test DEV	1402	46248	Jacky GI Gold	Jacky GI Gold	Silver 1 day Membership		0.00	-	$1.49	$26.49
	25-10-2026 19:00	widget test DEV	1401	46247	Murali Krishna	Murali Krishna	Bronze 1 day Renewal		0.00	-	$1.19	$16.19
	25-10-2026 11:00	widget test DEV	1400	46245	Anonymous Anonymous	Anonymous Anonymous	Bronze 1 day Renewal		0.00	-	$1.19	$16.19
	25-10-2026 11:00	widget test DEV	1399	46244	Anonymous Anonymous	Anonymous Anonymous	Bronze 1 day Renewal		0.00	-	$1.19	$16.19
	24-10-2026 19:00	widget test DEV	1398	46243	Murali Krishna	Murali Krishna	Bronze 1 day Renewal		0.00	-	$1.19	$16.19

Figure 10. Daily Summary report with renewal transactions

If something goes wrong

Member reports	What to check
Error 403 on the membership page	The Ezyrenewal licence is inactive or expired; contact Bepoz support
Can't sign in or no code received	Card/account number and email must match Bepoz; check spam folder
No renewal options shown	No active, current renewal for their membership; check Membership and the Bepoz renewal dates
Payment declined	Declined by the bank; the member can try another card
Receipt not received	Resend it (see Resend a receipt)
Auto Renewal emails not received	Check all four autorenew emails are Active in the Emails tab
MyPlace member asked to log in again	Contact Bepoz support to check the MyPlace link to Ezyrenewal

What we need from you

- ☐ Let Bepoz set up the secure Cloudflare connection between your Bepoz server and EzyOffice (no port forwarding needed).
- ☐ Confirm your memberships and renewals in Bepoz, or ask us to set them up.
- ☐ Complete your Oolio Pay account application.
- ☐ Send us your logo, brand colours, icons and your Membership Terms & Conditions.
- ☐ Make sure every member has an email address in Bepoz.
- ☐ Ask your web designer to add the membership page to your website.
- ☐ Tell us if you offer Auto Renewal, so we can activate the autorenew emails.
- ☐ Tell us if you use the MyPlace app, so we can connect it to Ezyrenewal.
- ☐ Book and attend your training session with Bepoz.

Questions? Contact the Bepoz support team.