



# SIMPLY MANAGE VOUCHERS

# USER GUIDE

[info@simplymanagevouchers.com](mailto:info@simplymanagevouchers.com)

Head Office: +353 1 2811960

Ireland: 6F, Network Enterprise  
Park, Ballycrone, Kilcoole, Co.  
Wicklow

## User Information

---

### User Notice:

All information contained in this manual is subject to change without prior notification based on the changes made to the software.

### Support:

Email: [sales@simplymanagevouchers.com](mailto:sales@simplymanagevouchers.com)

Telephone: +353 1 2811960 or +442071831227

### Product Information:

For information about all **Simply Manage Vouchers** services and how they can help you support your product usage. You can reach them out at the below web link for further contact details:

**Website:** <https://simplymanagevouchers.com/>

# Contents

---

<b>User Information</b>	<b>1</b>
User Notice:	1
Support:	1
Product Information:	1
<b>Contents</b>	<b>2</b>
<b>Introduction</b>	<b>4</b>
Overview:	4
Features:	4
<b>Sign In</b>	<b>6</b>
<b>Dashboard</b>	<b>7</b>
<b>Dashboard Components:</b>	<b>7</b>
Menu Components:	8
1- Vouchers Sold:	9
2- Add Vouchers:	10
3- Redeem:	11
<b>Voucher Section:</b>	<b>12</b>
Frontend:	13
1. Purchase:	13
2. Purchase Link:	13
3. Redeem Link:	14
4. Refill:	14
5. Refill Link:	15
<b>Reporting:</b>	<b>16</b>
• Best Selling vouchers:	16
• Redeem status:	17
<b>Redeem History:</b>	<b>18</b>
• Redeem History per month:	18
• Redeem History list:	18
<b>Redeemed by Partner:</b>	<b>19</b>
<b>Setup:</b>	<b>19</b>
1- Theme:	20
2- Manage Preset Vouchers:	20
3- Upload Alias Data:	21

File Example:	21
4- Email Tray:	22
<b>Secondary Menu:</b>	<b>22</b>
1. Business:	23
2. Payment:	24
3. Simple Mail Transfer Protocol - SMTP:	25
4. Email:	25
5. User:	26
6. Role:	27
7. Partner:	27
8. Partner Request:	28
9. My Profile:	28
10. Logout:	28

# Introduction

---

## Overview:

The ***Simply Manage Vouchers*** is a web based voucher management software that provides a convenient single-point system for creation, distribution and tracking of vouchers. It is an all in one solution for organizations giving them full control in the form of a system capable of tracking and handling voucher management.

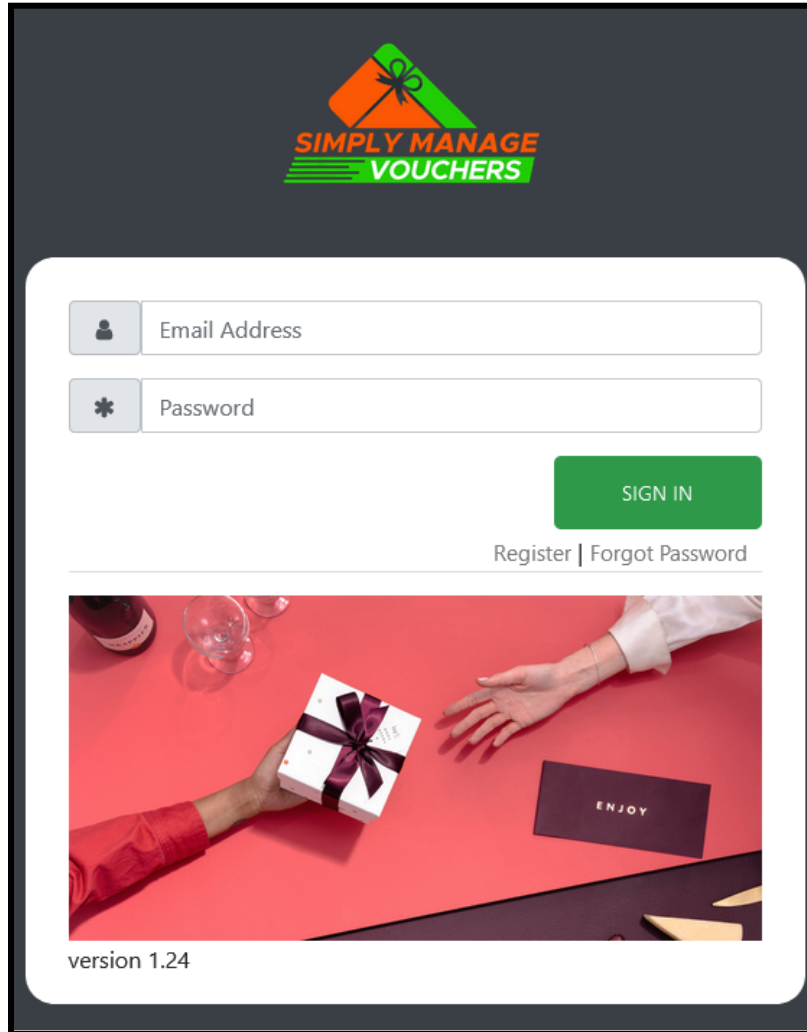
## Features:

- System generated summary for vouchers used and issued by the system.
- Creation and editing of vouchers.
- Integrated online payment mechanism.
- Customization options for the system front-end.
- Built-in email system.
- Privileged access functionality.

This Page Intentionally Left Blank

## Sign In

---

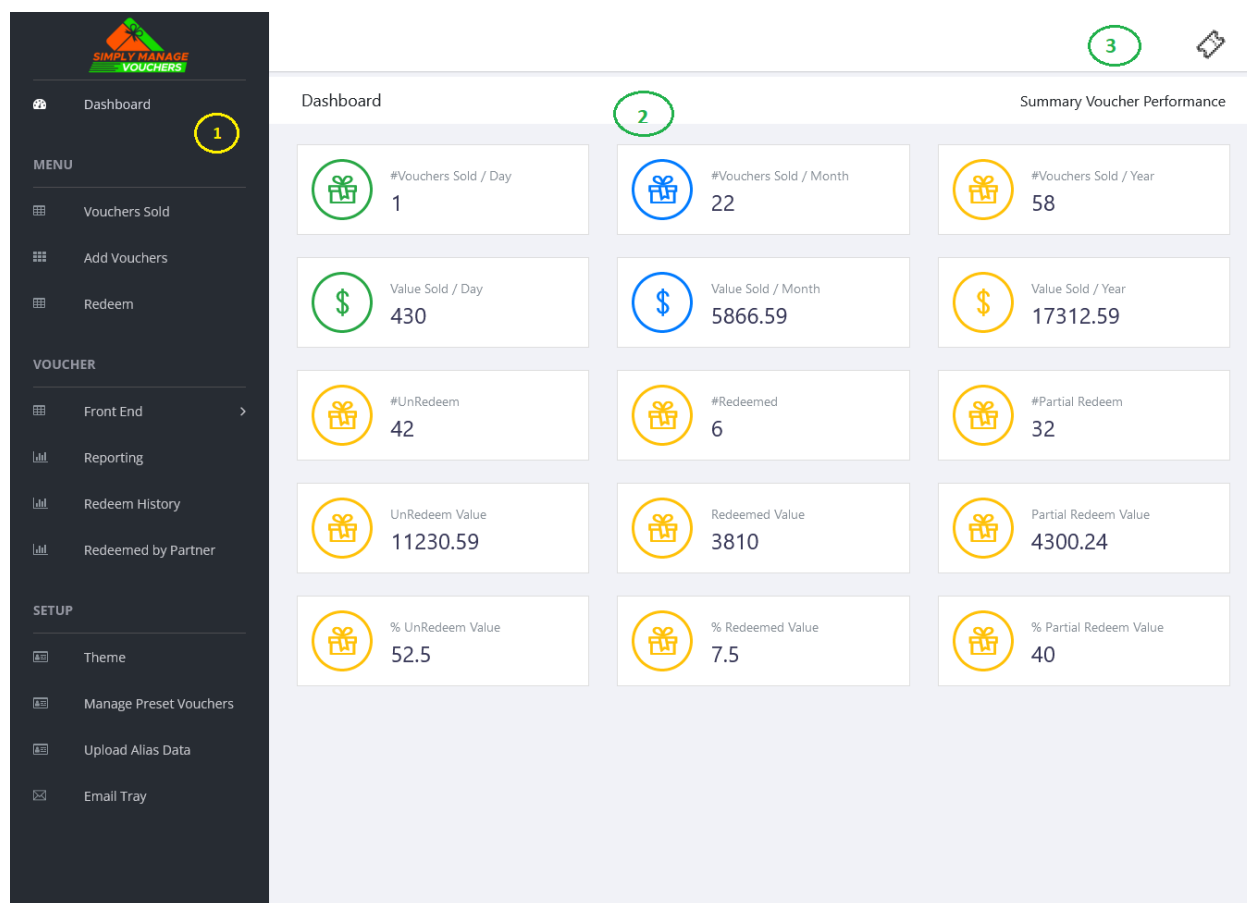


The image shows the 'Sign In' screen of the 'Simply Manage Vouchers' application. At the top, there is a logo consisting of a green and orange diamond shape with a black ribbon, and the text 'SIMPLY MANAGE VOUCHERS' in green and orange. Below the logo, there are two input fields: 'Email Address' with a person icon and 'Password' with an asterisk icon. A green 'SIGN IN' button is positioned to the right of the password field. Below the button, there are links for 'Register' and 'Forgot Password'. At the bottom of the screen, there is a promotional image showing a hand holding a white gift box with a purple ribbon, and another hand reaching out. A small black card with the word 'ENJOY' is also visible. The text 'version 1.24' is displayed at the bottom left of the screen.

version 1.24

This is the first screen that you will see. You will need to enter your correct username and password to sign-in to the application.

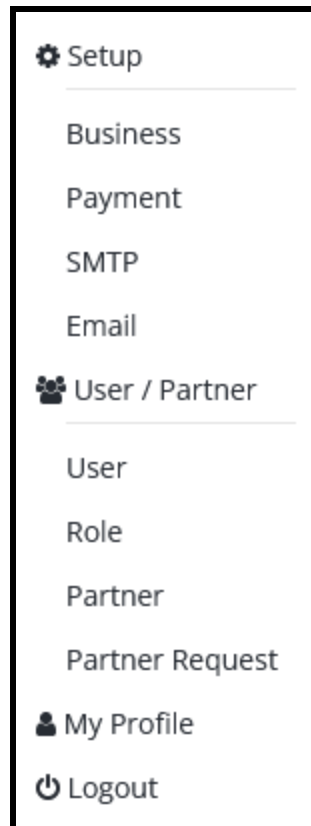
# Dashboard



## Dashboard Components:

	1-Main Menu	2- Summary Voucher Performance	3- Secondary Menu
<b>Dashboard:</b>	The main menu is visible to the user after logging in to the system consisting of sub-menus and several options described in detail further on.	Summary of vouchers entered and used within the system are displayed here. Details include total vouchers sold, total value in \$ and their redeem status.	This menu consists of miscellaneous settings and options. Can be accessed by clicking the voucher icon in the top right side of the screen.(Image attached below)

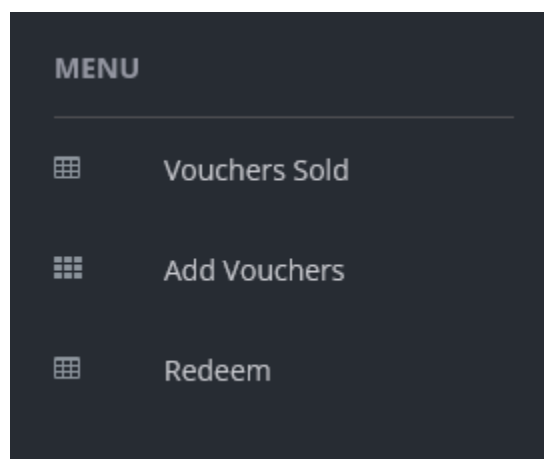




Secondary Menu

## Menu Components:

We go into detail about the sections on the dashboard page.



## 1- Vouchers Sold:

Vouchers Code	Alias	Voucher Name	Sale Value	Current Value	Sold Date	Recipient	Redeemed Status
A unique code generated for each voucher in the system.	Numerical identifier of the voucher.	The name of the voucher.	The total value in currency of the voucher.	Current value of currency of the voucher.	The date on which voucher was generated .	Name of the person/entity the voucher belongs to.	Indicates if the voucher has been redeemed.

Voucher Code	Alias	Voucher Name	Sale Value	Current Value	Sold Date	Recipient	Redeemed
<a href="#">202209031127260897202104061455340606</a>	00000002	Custom Voucher	430	400	2022-09-03 11:27:26	Recipient Name	✗
<a href="#">202209021748100661202104061455340606</a>	00000001	Custom Voucher	100	50	2022-09-02 17:48:10	TestingVoucher	✗
<a href="#">202209020749230276202104061455340606</a>		All inclusive	500	280	2022-09-02 07:49:23	tedybeerp@gmail.com	✗

### Details

Preview

History

Info

Custom Voucher

Voucher

Value : 400

Redeem Voucher

Gift Vouchers

When you click on the voucher code URL, a pop-up will appear with the details of the voucher. You can switch through the **“Preview”**, **“History”** and the **“Info”** tab to find more details of the voucher.














## 2- Add Vouchers:

Enter the details of the voucher you want to add in the system and click on **“Pay Voucher”**

Voucher Name:	Custom Voucher
Voucher Alias:	Alias 8 digit
Value (Price):	
Recipient Name:	
Email:	Enter Email
Purchaser:	
Purchaser Email:	Enter Email
Message:	
Is this a complimentary voucher?	<input type="checkbox"/> Complimentary

 Pay Voucher

Clicking on **“Pay Voucher”** will take you to the payment gateway in which various payment options are available.

 <b>ihoteltest Test Account</b> Order description: Custom Voucher  <b>To pay</b> <b>500.00 GBP</b>	<b>How do you want to pay?</b>  <table><tr><td></td><td>Visa Will add a surcharge of 0.00 GBP</td><td>&gt;</td></tr><tr><td></td><td>Visa Debit Will add a surcharge of 0.00 GBP</td><td>&gt;</td></tr><tr><td></td><td>Visa Electron Will add a surcharge of 0.00 GBP</td><td>&gt;</td></tr><tr><td></td><td>MasterCard Will add a surcharge of 0.00 GBP</td><td>&gt;</td></tr></table>		Visa Will add a surcharge of 0.00 GBP	>		Visa Debit Will add a surcharge of 0.00 GBP	>		Visa Electron Will add a surcharge of 0.00 GBP	>		MasterCard Will add a surcharge of 0.00 GBP	>
	Visa Will add a surcharge of 0.00 GBP	>											
	Visa Debit Will add a surcharge of 0.00 GBP	>											
	Visa Electron Will add a surcharge of 0.00 GBP	>											
	MasterCard Will add a surcharge of 0.00 GBP	>											

The screenshot shows a web interface for entering card details. On the left, a grey sidebar contains the text 'ihoteltest Test Account', 'Order description: Custom Voucher', and 'To pay 500.00 GBP'. The main area is titled 'Your card details' and contains four input fields: 'Name' (placeholder: 'Insert Purchaser'), 'Card' (placeholder: '0000 0000 0000 0000'), 'Expiry' (placeholder: 'MM / YY'), and 'CVC' (placeholder: '123'). A green button labeled 'Confirm card details' is at the bottom right, and a 'Back' link is at the bottom left.

You can enter your payment details and then confirm the details which will create your voucher within the system. Upon voucher creation, a confirmation email is sent to both the voucher receiver and voucher creator.

**Voucher Receiver:** The customer that will get to use the voucher.

**Voucher Creator:** The person or the company that generates the voucher and assigns it to their customer.

### 3- Redeem:

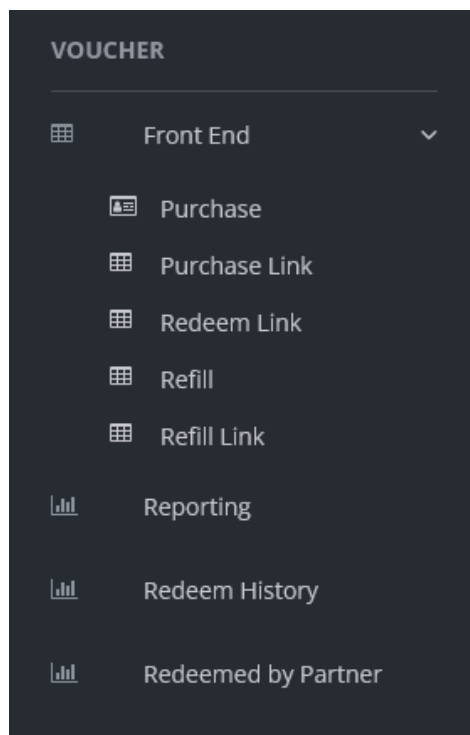
You can enter your voucher code in the input field to redeem it. Upon redeeming, the system will display voucher details and the form to redeem the amount from it.

The screenshot shows a 'Redeem' form. It has a title 'Redeem' at the top. Below it is a label 'Voucher Code:' followed by a text input field. At the bottom, there are two buttons: a green 'Check Value' button and a red 'Clear' button.

---

<b>Amount :</b>	<input type="text" value="200"/>
<b>Description :</b>	<input type="text" value="Fully Redeemed"/>
	<input type="button" value="Redeem Voucher"/>

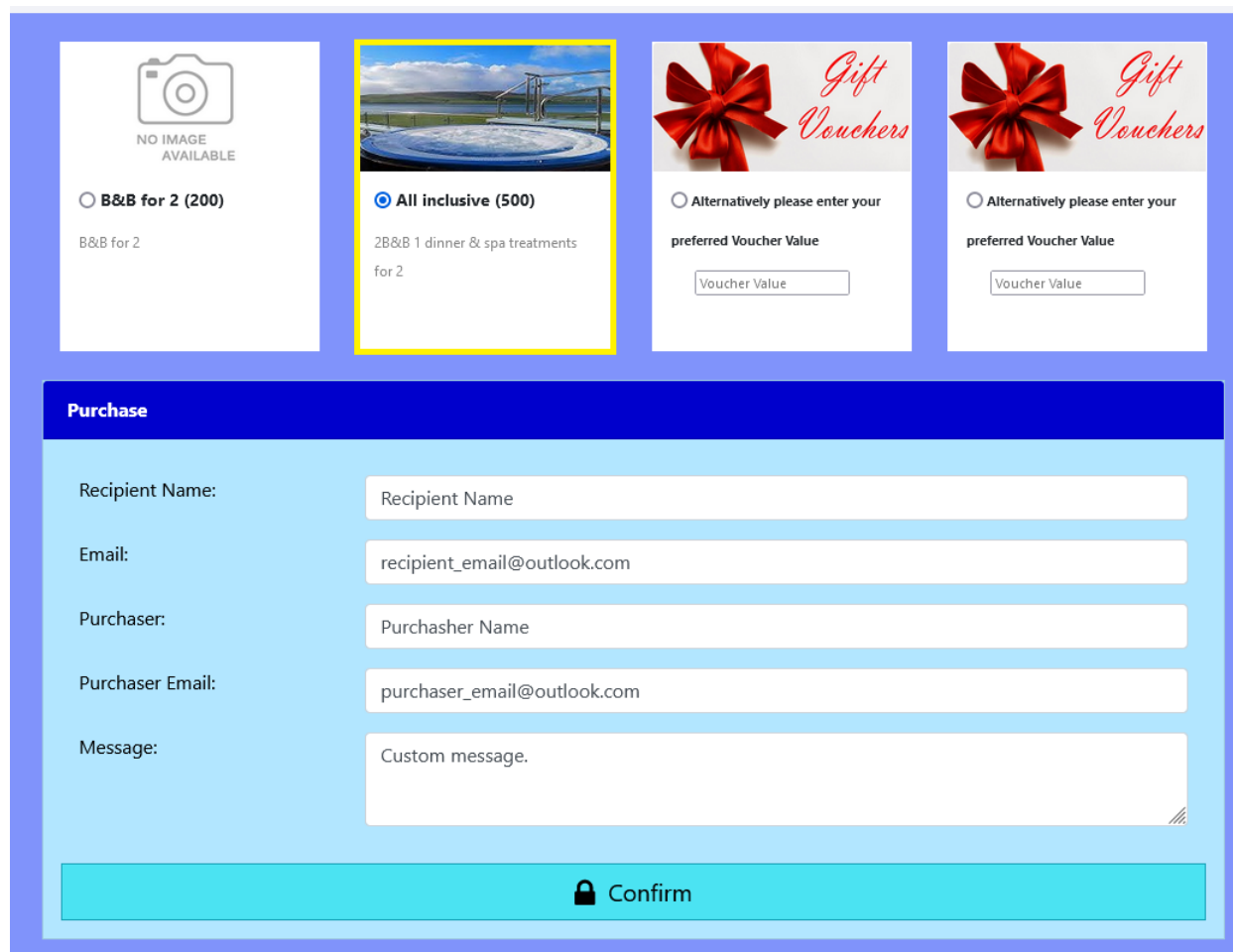
## Voucher Section:



### Frontend:

#### 1. Purchase:

You can purchase a voucher for a customer through this section. You are required to fill a form that asks you for various details such as recipient name, email address and custom message.



The screenshot displays the 'Purchase' section of the voucher management system. At the top, there are four cards for selecting a voucher type. The second card, 'All inclusive (500)', is highlighted with a yellow border. Below these cards is a form titled 'Purchase' with a blue header. The form contains five input fields: 'Recipient Name', 'Email', 'Purchaser', 'Purchaser Email', and 'Message'. Each field has a placeholder text. At the bottom of the form is a large blue button labeled 'Confirm' with a lock icon.

Purchase	
Recipient Name:	<input type="text" value="Recipient Name"/>
Email:	<input type="text" value="recipient_email@outlook.com"/>
Purchaser:	<input type="text" value="Purchaser Name"/>
Purchaser Email:	<input type="text" value="purchaser_email@outlook.com"/>
Message:	<input type="text" value="Custom message."/>
<input type="button" value="Confirm"/>	

Upon completing the form for voucher purchase, click on the **“Confirm”** button and you will be redirected to the payment process where you will be able to pay for the voucher and add it to the system.

#### 2. Purchase Link:

The **“Purchase Link”** is another way of purchasing a voucher. Only difference is that clicking on **“Purchase Link”** displays a full screen front end version of the voucher purchase functionality.

### 3. Redeem Link:

Clicking on **“Redeem Link”** will open the voucher redeem functionality where you can enter the voucher code and redeem it.



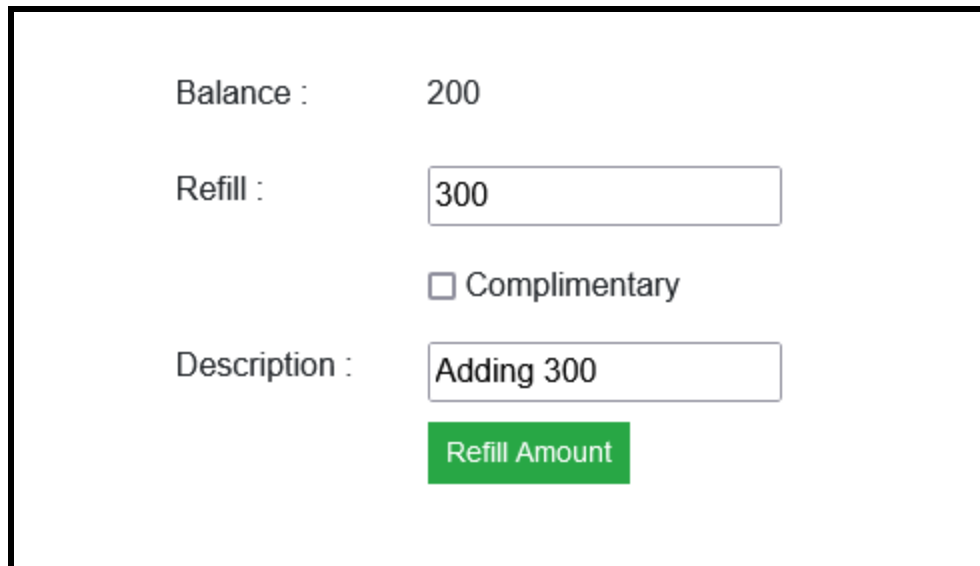
**Amount :**

**Description :**

Redeem Voucher

### 4. Refill:

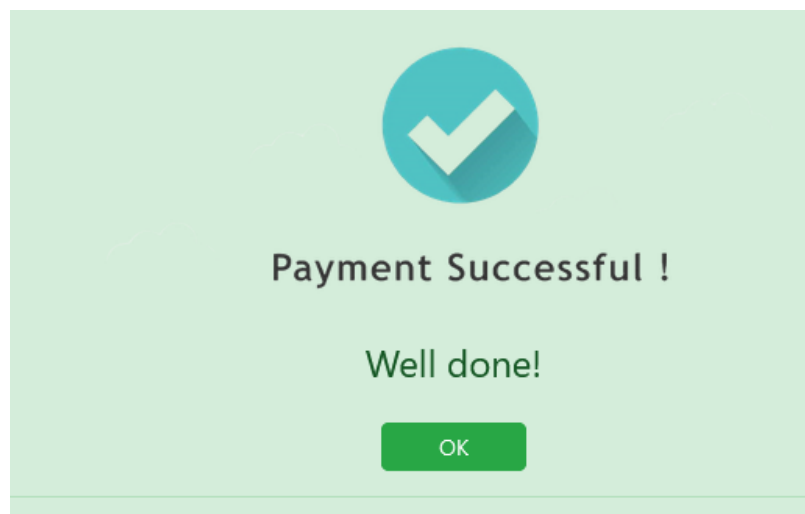
You can refill some amount to the voucher. You need to provide the voucher code and then enter the amount for refill.



The screenshot shows a form for adding a refill. It includes a 'Balance' field with the value '200', a 'Refill' field with the value '300', a checkbox for 'Complimentary' which is unchecked, and a 'Description' field with the value 'Adding 300'. A green button labeled 'Refill Amount' is positioned below the description field.

The form for adding a refill shows the available balance in a voucher and asks for the following:

- Amount to add.
- Whether the refill is complimentary.
- Description of the refill.



Message shown when payment is successful.

#### 5. Refill Link:

Same functionality as the **“Refill”** feature.

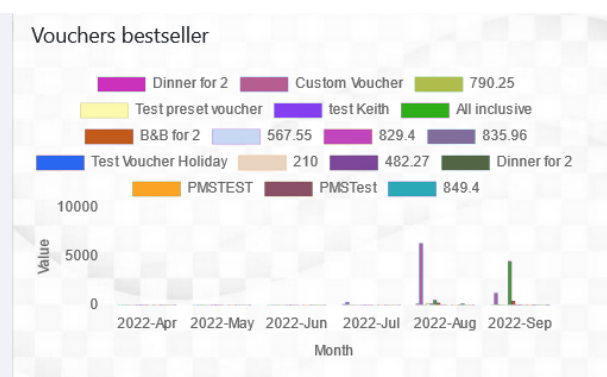
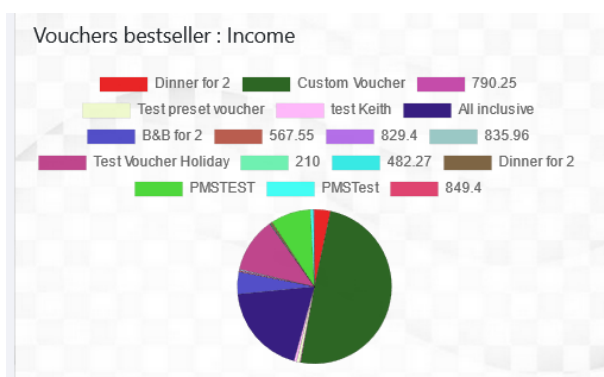
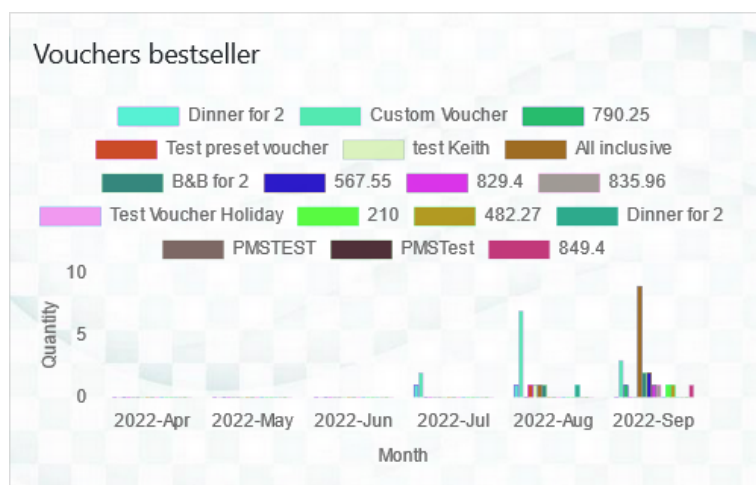
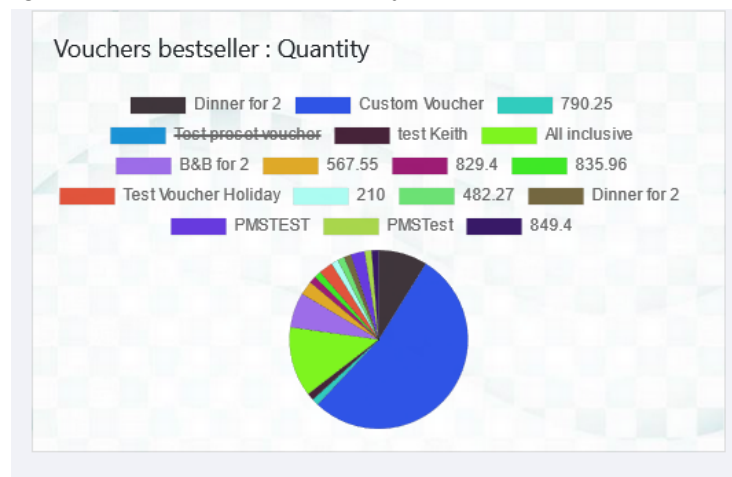


## Reporting:

This section shows statistical details related to the vouchers used.

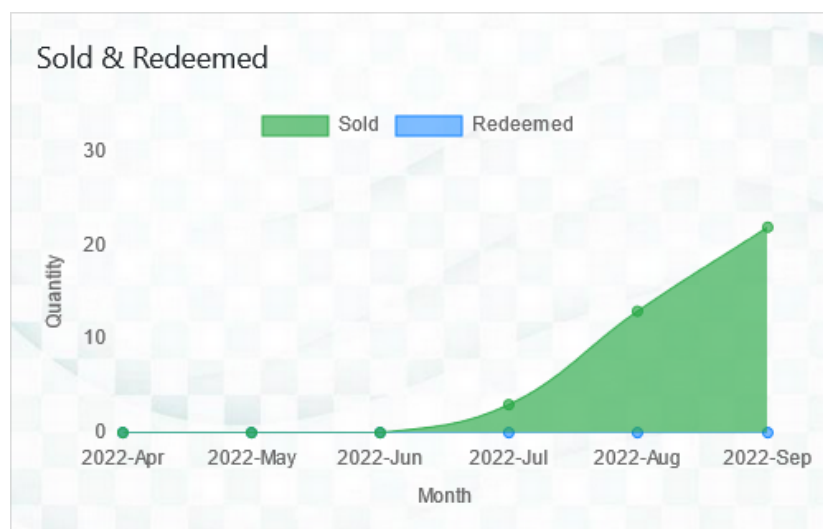
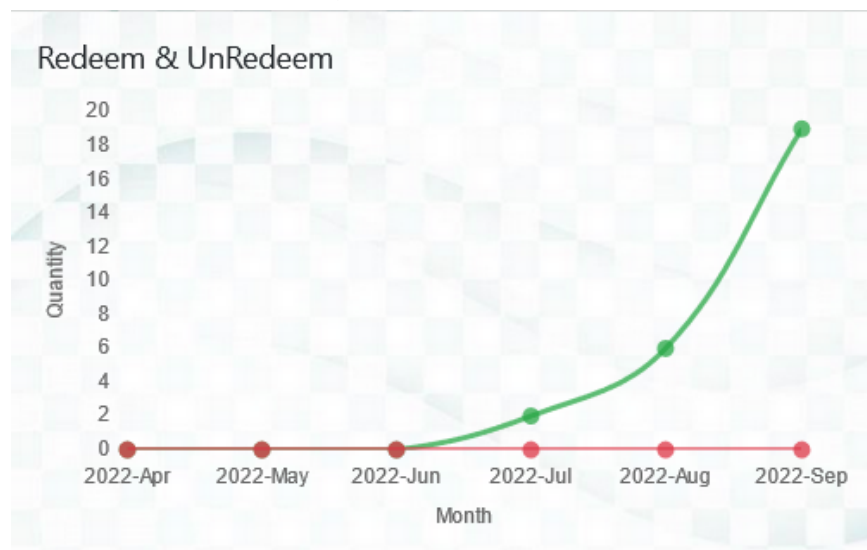
- **Best Selling vouchers:**

Shows the bestselling voucher in terms of quantity.



- **Redeem status:**

Shows the current statistics of total sold, redeemed and unredeemed vouchers.



## Redeem History:

This section displays the overall redeem history for all vouchers issued and used. The **“Redeem History”** page consists of two tables displaying redeem history per month and redeem history list.

Redeem History Per Month							
Show <input type="text" value="10"/> entries		Search: <input type="text"/>					
Business Name ↑↓	Apr-2022 ↑↓	May-2022 ↑↓	Jun-2022 ↑↓	Jul-2022 ↑↓	Aug-2022 ↑↓	Sep-2022 ↑↓	Totals ↑↓
Keith's Hotel	0	0	0	0	0	8410.24	8410.24
Mirek's Restaurant	0	0	0	0	0	40	40
<b>Totals:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>8450.24</b>	<b>8450.24</b>
Showing 1 to 2 of 2 entries						Previous	1 Next

- Redeem History per month:

The first table **“Redeem History Per Month”** showing the per month stats of all vouchers that have been redeemed this current and previous months.

- Redeem History list:

**“Redeem History List”** displays all the history of redeemed/unredeemed vouchers.

Redeem History List					
Show <input type="text" value="10"/> entries		Search: <input type="text"/>			
Business ↑↓	Voucher Code ↑↓	Redeem Date ↑↓	Partner ↑↓	Amount ↑↓	
<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	
Mirek's Restaurant	202104191220480751202103301034030376	2021-05-25	Yes	40	
Keith's Hotel	202104061550390454202104061455340606	2021-06-01	No	20	
Keith's Hotel	202106011234280778202104061455340606	2021-06-01	No	70	

## Redeemed by Partner:

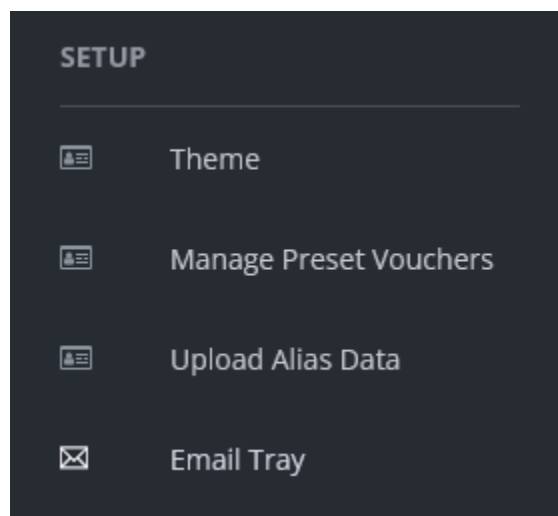
**“Redeemed by Partner”** is the functionality within the dashboard that allows the user to view the statistics of their partner’s voucher redeems.

Redeem Partner Per Month							
Show <input type="text" value="10"/> entries		Search: <input type="text"/>					
Partner Name ↑↓	Apr-2022 ↑↓	May-2022 ↑↓	Jun-2022 ↑↓	Jul-2022 ↑↓	Aug-2022 ↑↓	Sep-2022 ↑↓	Totals ↑↓
Mirek's Restaurant	0	0	0	0	0	50	50
<b>Totals:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>50</b>	<b>50</b>
Showing 1 to 1 of 1 entries		Previous <b>1</b> Next					

Redeem Partner List			
Show <input type="text" value="10"/> entries		Search: <input type="text"/>	
Partner ↑↓	Voucher Code ↑↓	Redeem Date ↑↓	Amount ↑↓
<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
Mirek's Restaurant	202105250830500244202104061455340606	2021-05-25	50
Showing 1 to 1 of 1 entries		Previous <b>1</b> Next	

## Setup:



## 1- Theme:

You can customize the look of the voucher creation section of the system by changing the background color, button color, header and the font.

### Color Setting

#### Background

Red (128)

Green (147)

Blue (251)

☐ Transparent

#### Header

Red (0)

Green (0)

Blue (204)

#### Button

Red (75)

Green (227)

Blue (242)

#### Blog

Red (178)

Green (230)

Blue (255)

#### Font

Button:

Blog:

## 2- Manage Preset Vouchers:

You can also add preset vouchers (*that are displayed on top of the purchase form*). Below image highlights the options for adding and deleting the vouchers.

\* Max 3 preset vouchers can be displayed at any time.

Vouchers

Add/Edit Voucher

Show 10 entries

Search:

Voucher Name ↑↓	Value ↑↓	Start Date ↑↓	Expire Date ↑↓	
All inclusive	500	2022-08-23	2023-08-24	<div>Edit</div> <div>Delete</div>
B&B for 2	200	2022-02-22	2024-02-22	<div>Edit</div> <div>Delete</div>

Showing 1 to 2 of 2 entries

Previous

1

Next

Add New Voucher

Voucher Name:

Value (Price):

Start Date:

Expire Date:

Description:

Image(.png , size 260\*130) :

Browse...

No file selected.

## 3- Upload Alias Data:

You can also create vouchers by uploading alias data. To do so, you would need an excel sheet with details of the voucher and then upload it to the system. The template for the excel sheet can be found from the main settings page.

File Example:

	A	B	C	D	E	F
1	Alias	Balance	VoucherName	SaleValue	SoldDate	Recipient
2	Ex-00001	100.00	Example Voucher 1	100	2022-01-01 03:56:21 GMT+0000	Guest
3	Ex-00002	200.00	Example Voucher 2	200	2022-01-02 03:56:21 GMT+0000	Customer
4	Ex-00003	300.00		300		
5	Ex-00004	400.00				
6	Ex-00005	500.00	Example Voucher 5	500	2022-01-03 03:56:21 GMT+0000	Guest


After import, the following can be checked in the voucher sold page:

## Simply Manage Voucher User Manual

Voucher Code	Alias	Voucher Name	Sale Value	Current Value	Sold Date	Recipient	Redeemed
<a href="#">202209021503010943202209010644430638</a>	Ex-00001	Example Voucher 1	100	100	2022-01-01 03:56:21	Guest	✗
<a href="#">202209021503030890202209010644430638</a>	Ex-00002	Example Voucher 2	200	200	2022-01-02 03:56:21	Customer	✗
<a href="#">202209021503050822202209010644430638</a>	Ex-00003	300	0	300	2022-09-02 08:03:01	Guest	✗
<a href="#">202209021503070760202209010644430638</a>	Ex-00004	Local Voucher	0	400	2022-09-02 08:03:01	Guest	✗
<a href="#">202209021503090694202209010644430638</a>	Ex-00005	Example Voucher 5	500	500	2022-01-03 03:56:21	Guest	✗

### 4- Email Tray:

This section displays any unsent or queued email slotted to be sent out from the portal.

Email Tray List					 Resend All
Show	10	entries	Search:		
Email Subject	Email From	Email To	Email Detail	Re-send email	
No data available in table					
Showing 0 to 0 of 0 entries					Previous Next

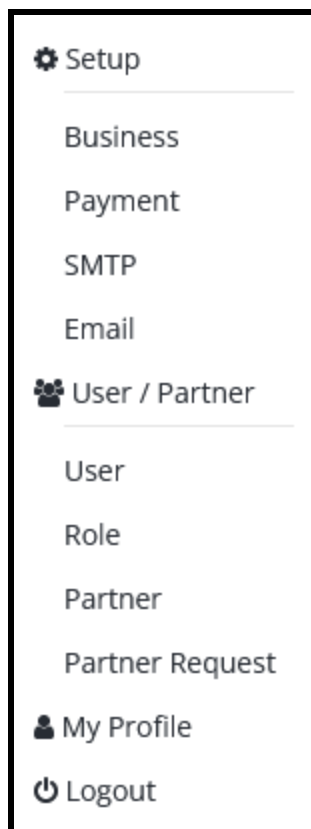
### Secondary Menu:

The secondary menu accessible through the main dashboard consists of miscellaneous system settings related to business, payment, email template, user roles and profiles. The secondary dashboard menu can be found by clicking on the voucher icon on the right hand side of the portal screen.

Screengrab below:



**“Voucher”** Icon to access the second menu.



## 1. Business:

This section allows you to make changes to your business details through a form which includes options for editing your business code, the business name, official email address, official website, contact details and logo.



## Simply Manage Voucher User Manual

Business Setting	
Business Code:	<input type="text" value="202104061455340606"/>
Business Name:	<input type="text"/>
Email:	<input type="text" value="Enter Email"/> <input checked="" type="checkbox"/>
Website:	<input type="text"/>
Phone:	<input type="text" value="Phone Number"/>
Physical Card :	<input checked="" type="checkbox"/> Allow Option Send Physical Card
Physical Card Charge :	<input type="text" value="15"/>
Logo import(.png):	<input type="button" value="Browse..."/> No file selected.

## 2. Payment:

Allows users to add payment methods and set up payment processing functionality within the portal.

Payment Integration	
Vendor Name:	<input type="text" value="ihoteltest"/>
Vendor Email:	<input type="text"/>
Integration Key:	<input type="text"/>
Integration Password:	<input type="password" value="....."/>
Currency Code:	<input type="text" value="GBP"/>
Currency Symbol:	<input type="text" value="£"/>
Entry Method:	<input type="text" value="TelephoneOrder"/> ▼
Encryption Password:	<input type="password" value="....."/>
Form Payment Url:	<input type="text" value="Test Environment"/> ▼
Surcharge (%):	<input type="text" value="0"/>
Tax (%):	<input type="text" value="0"/>

### 3. Simple Mail Transfer Protocol - SMTP:

Set up email **Simple Mail Transfer Protocol - SMTP** services and configure accordingly as per your business needs.

**Simple Mail Transfer Protocol:** The Simple Mail Transfer Protocol is an Internet standard communication protocol for e-mail. Mail servers and other message transfer agents use SMTP to send and receive mail messages

**SMTP**

SMTP Server:

smtp-relay.sendinblue.com

SMTP Port:

587

SMTP Username:


SMTP Password:


●●●●●●●●●●●●●●●●

Send from:

BCC Email:

Enable SSL:

☒ 

 Test SendMail

### 4. Email:

Allows the user to update and edit the email that is sent to the recipient of the voucher. The user has access to a **WYSIWYG** editor allowing them to customize the email as per their requirements.

**WYSIWYG:** WYSIWYG is an acronym for "what you see is what you get." It is a type of editing software that allows users to see and edit content in a form that appears as it would when displayed on an interface, webpage, slide presentation or printed document.

# Simply Manage Voucher User Manual

### Email To Recipient Template

\* format = {fieldName} , field name list ( CardDisplay, PurchaserEmail, RecipientEmail, PurchaserName, RecipientName, MessageFromPurchaser, Price, VoucherName, VoucherCode, VoucherDescription, VoucherCardURL, BusinessName, BusinessEmail, BusinessWebsite, BusinessPhoneNumber, CurrencySymbol)

Email Content Editor Tool

**B I S T<sub>x</sub>** | **a=** | **:|** | **:** | **”** | Styles ▾ | Format ▾ | ?

body

Email HTML Display

Email Text Display

5. User:

Allows you to add/edit/ remove users that have access to the portal. Admin can also edit the role of users in the portal.

Users

Add/Edit Users

Show 10 entries

Search:

No	↑↓ Email	↑↓ Role	↑↓ Verify	↑↓ Active	↑↓
1	<div></div>	Admin	<div></div>	<div></div>	<div>EditDelete</div>
2	<div></div>	Super Admin	<div></div>	<div></div>	<div>EditDelete</div>
3	<div></div>	Super Admin	<div></div>	<div></div>	<div>EditDelete</div>
4	<div></div>	Super Admin	<div></div>	<div></div>	<div>EditDelete</div>

## 6. Role:

Similar to the user functionality - role section allows the user to add/edit/remove roles. The portal consists of 3 roles: Super Admin, Admin and User.

Role

Add/Edit Roles

Show 10 entries

Search:

No	Role	Menu	Voucher	Setup	API	
1	Super Admin	✓	✓	✓	✓	<button>Edit</button> <button>Delete</button>
2	Admin	✓	✓	✓	✓	<button>Edit</button> <button>Delete</button>
3	User	✓	✗	✗	✗	<button>Edit</button> <button>Delete</button>

Showing 1 to 3 of 3 entries

Previous

1

Next

## 7. Partner:

Add/Edit or remove a partner based on the requirements. Features are similar to add users and add roles.

Partner

Add/Edit Partner

Add New Partner

Partner Code:

Business Code

Partner Name:

Business Name

Description:

Partner Status

☒ Send New Request

Permission

☐ Allow Redeem

## 8. Partner Request:

Displays any outstanding partner request made within the portal.

Partner Request

Setup / Partner Request

Show  entries

Search:

No	Requester	Code	Status	Accepted
No data available in table				

Showing 0 to 0 of 0 entries

Previous

Next

## 9. My Profile:

You can view your profile details here and make changes accordingly.

Profile

Role Name: Admin

Email:

First Name:

Surname:

Password:

Confirm Password:

Token Password:

Generate Token

## 10. Logout:

Allows users to sign out of the system.

