

# **FLEXPAY**

## **Training Manual & Support Guide**

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# Intro to FlexPay

## What is FlexPay?

FlexPay is a subscription model designed to offer flexibility to your customers, enabling them to build a wine balance with recurring payments and enjoy exclusive perks.

## Why FlexPay?

### Attract Younger, Subscription-Driven Demographics

- **Engaging Millennials and Gen Z:** Younger wine consumers (ages 21-40) prefer flexibility and control in their purchases, making traditional wine clubs less appealing. FlexPay offers a subscription model that aligns with their expectations, modeled after services they already trust, like Netflix and Spotify.
- **Tap into the Subscription Economy:** With subscription services becoming a \$300+ billion industry, FlexPay capitalizes on this trend by offering a wine club experience that feels familiar, customizable, and low-risk for younger audiences.
- **Focus on Digital Convenience:** These demographics are digitally savvy, expecting seamless online signup, payment, and account management—FlexPay delivers all of this in an intuitive way.

### Reduce the Commitment Barriers of Traditional Wine Clubs

- **Lower Financial Barriers:** Traditional wine clubs often require upfront costs and fixed shipments, which can create "sticker shock" and deter potential members. FlexPay eliminates this by allowing customers to pay incrementally and use their balance as they choose.
- **Customer Autonomy:** Instead of locking members into pre-selected shipments, FlexPay empowers them to choose wines that fit their preferences, creating a sense of control and satisfaction.
- **Flexible Payment Options:** With customizable payment tiers and frequencies, FlexPay accommodates a range of budgets and purchasing habits, increasing appeal to a broader audience.

# Intro to FlexPay

## Why FlexPay?

### Increase Customer Loyalty and Revenue Through a Flexible Membership Model

- **Retain Customers Longer:** By removing rigid commitments and emphasizing flexibility, FlexPay encourages long-term participation. Members can skip payments or pause their subscription without canceling, reducing churn and enhancing retention rates.
- **Boost Average Revenue Per User (ARPU):** Customers with a growing balance are more likely to purchase higher-value products, as they perceive their accumulated funds as a “bonus.” This can lead to larger order sizes and increased upsell opportunities.
- **Drive Repeat Engagement:** Automated monthly payments and balance updates ensure that members stay connected to your winery, regularly returning to browse and make purchases.
- **Encourage Brand Advocacy:** Offering a modern, user-focused subscription model sets your winery apart from competitors, making customers more likely to recommend your service to friends and family.

FlexPay is more than just a subscription option; it's a strategic solution that bridges the gap between traditional wine clubs and modern consumer expectations. It attracts younger buyers, makes wine membership more accessible, and strengthens your connection with customers—all while driving consistent revenue growth for your winery.

# How FlexPay Works

## Overview of Features

1. Monthly payment selection with payment amount selections
2. Automatic balance accrual and usage on website store
3. FlexPay member type allows for exclusive perks and member-only benefits
4. Automatic email notifications for key payment and subscription events
5. Winery admin controls to modify balance amount (permissioned access only)

## Customer Journey

1. Sign up via your website or over the phone.
2. Consumers choose their own amount (or the winery can force a static price)
3. Build their balance over time and redeem it for wine purchases on the website.
4. The consumer receives regular automatic email notifications with every payment reminding them to spend their balance
5. Consumers can skip payment/cancel at any time
  - The remaining balance is still available to them and can be redeemed, even after canceling

# Setting Up FlexPay

## Configuration Steps for Wineries

### 1. Log into the vinSUITE Admin Portal

- Access your admin dashboard to begin setup.
- Note: This feature is only available in the vinSUITE Admin Portal and is not accessible through the legacy eWinery portal.

### 2. Navigate to the FlexPay Setup Section

- Locate the dedicated FlexPay configuration area in your admin menu.
  - Subscriptions > FlexPay Setup

### 3. Set Your Subscription Labels

- **Label:** Enter the name of your subscription offering. This label will appear on your website as the title of your FlexPay subscription.
- **Balance Label:** Define the term customers will see when viewing or using their FlexPay balance (e.g., “Wine Wallet” or “FlexPay Balance”).

### 4. Set Subscription Parameters

- Configure how customers will contribute to their FlexPay balance:
  - **Static Monthly Amount:**
    - Define a default charge per month.
    - Toggle the ‘**Is Monthly Charge Customizable**’ setting to **OFF** to require this fixed amount.
  - **Custom Monthly Amount:**
    - Allow customers to choose their own monthly payment.
    - Toggle the ‘**Is Monthly Charge Customizable**’ setting to **ON** and set a **minimum** and **maximum** payment range.

# Setting Up FlexPay

## 5. Assign a FlexPay Category

- Select or create a product category exclusive to FlexPay members.
- This category will showcase curated products available for purchase using their FlexPay balance.

## New Automated System Emails

The FlexPay feature introduces 4 new automated system emails that are sent out during key events in the FlexPay workflows. You will need to review and activate each automated system email. Here is a quick breakdown of these new ASEs:

### 1. FlexPay Funds Deposited

#### Action Trigger:

- Winery manually deposits funds into a customer's FlexPay account without a customer payment.

#### Email Details:

- **Subject Line:** "Funds Added to Your FlexPay Balance!"
- **Body Content:**
  - Confirmation that funds have been deposited.
  - Amount of funds added.
  - Updated balance available in the customer's account.
  - Reminder of how the balance can be used (e.g., to purchase wines from the FlexPay category or the entire store).

### 2. FlexPay Payment Confirmation

#### Action Trigger:

- A customer's scheduled FlexPay payment is successfully processed.

# Setting Up FlexPay

## Email Details:

- **Subject Line:** "Your FlexPay Payment Has Been Processed!"
- **Body Content:**
  - Confirmation of the payment amount.
  - Updated balance after the payment.
  - A link to view or redeem the balance on the winery's website.

## 3. FlexPay Subscription Cancellation

### Action Trigger:

- Customer cancels their FlexPay subscription.

### Email Details:

- **Subject Line:** "Your FlexPay Subscription Has Been Canceled"
- **Body Content:**
  - Confirmation of the subscription cancellation.
  - Final balance remaining in the account and instructions on how it can be used.
  - Optional encouragement to rejoin FlexPay in the future.

## 4. FlexPay Subscription Renewal

### Action Trigger:

- A customer's FlexPay subscription is renewed, either automatically or through manual reactivation.

### Email Details:

- **Subject Line:** "Welcome Back to FlexPay!"
- **Body Content:**
  - Confirmation that the subscription has been renewed.
  - Details of the first successful payment post-renewal.
  - Updated balance and a link to view or redeem the funds.
  - Reminder of FlexPay perks (e.g., member-only discounts, early access).

# Promoting FlexPay

## Marketing Best Practices

- Highlight the flexibility and perks of FlexPay in your communications.
- Use engaging messaging like "Wine Your Way, on Your Schedule."

## Winery Marketing Kit

- Leverage templates for:
  - **Email campaigns.**
    - [Email Template: Market Your FlexPay Subscription](#)
  - **Social media posts.**
    - [Social Media Post: Promote FlexPay](#)
  - **Website banners and landing pages.**
    - [Website Banner Design for FlexPay](#)

# Customer Management

## Enrolling Customers

- If vinSUITE hosts your content site, enabling the FlexPay feature will enable the Subscriptions(members.subscribe) page on navigation
- All users will see the designated FlexPay category on the website; those not signed in, or enrolled in the subscription will be redirected to the subscribe form when attempting to navigate to this exclusive store category
- (if configured in FlexPay Setup) Consumers will be able to select their own payment amount to be charged monthly
- Credit card will be charged for the selected amount at the time of sign-up, then again monthly based on the sign-up date
- Permissioned admin users will be able to enroll and adjust active enrollments through the member management tool within vinSUITE Admin panel

# Customer Management

## Managing Customer Accounts

- Access customer profiles to view balances, payment history, and account settings in new Subscriptions tab on Member profile.
- Modify subscription details or skip the next payment accounts upon customer request (access controlled by FlexPay member permission, under Settings > User Management > Roles).
- Funds can also be deposited with/without card payment (permissioned access)
- Consumers can only postpone the next upcoming payment and will need to return to the site to skip the following payment in the next month

## Handling Balance Redemption

- Ensure balances apply seamlessly to eligible purchases.
- Train staff to explain balance usage during online transactions.
- Balance redemption can be done through a consumer-driven shopping experience, or within the OMS
- Important Note: Balance redemption through TabletPOS or Club orders will be included at a later time

# Support & Troubleshooting

## Common Questions and Solutions

- **Issue:** Payment not processing.
  - **Solution:** Verify payment details and retry. If unresolved, escalate to vinSUITE Support.
- **Issue:** Customer balance not updated.
  - **Solution:** Check Transaction history under Member > Subscriptions. If the transaction shows and the balance is not updated, escalate to vinSUITE Support.

## Escalation Process

- If an issue cannot be resolved, contact vinSUITE Support at **support@vinsuite.com** or call **707.253.7400**.

# Frequently Asked Questions

**Full FAQ here:**

<https://vinsuite.my.site.com/community/s/article/FlexPay-FAQ>

## **How does FlexPay differ from traditional wine clubs?**

- FlexPay offers a more flexible and personalized approach compared to traditional wine clubs.
  - **Traditional Wine Clubs:** Customers typically commit to receiving pre-selected shipments at regular intervals, often with a fixed cost and selection.
  - **FlexPay:** Customers pay a monthly amount to build a wine balance. This balance can be used to purchase wines of their choice, whenever they want, offering complete control over their selections and timing.

## **Can customers skip or cancel their payments?**

- Yes, FlexPay is designed with customer flexibility in mind.
  - **Skip Payments:** Customers can skip a payment if needed, allowing them to pause their subscription temporarily without losing their balance or membership benefits.
  - **Cancel Subscription:** Customers can cancel their FlexPay subscription at any time. Upon cancellation, any remaining balance in their account will remain available for use, ensuring they can still enjoy the wines they've paid for.

# Frequently Asked Questions

## How do I handle partial payments during checkout?

- FlexPay is equipped to handle partial payments seamlessly:
  - If a customer's wine balance doesn't cover the full cost of their order, they can pay the difference at checkout using their credit card.
  - For example, if a customer has a \$50 FlexPay balance and their cart totals \$75, the system will apply the \$50 balance first, and the remaining \$25 can be paid with a credit card or other accepted payment methods.
  - This flexibility ensures a smooth checkout experience and encourages customers to use their FlexPay balance regularly.

# Contact Information for Support

## vinSUITE Support Team

- **Email:** [support@vinsuite.com](mailto:support@vinsuite.com)
- **Phone:** 707-253-7400
- **Hours:** Monday–Friday, 9 AM–5 PM (PST)