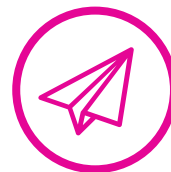.flexigroup

your guide to
welcome

Welcome is a sales portal provided by **flexigroup**, used by our partners to provide customers with our card products and Long Term Finance (LTF).

Welcome is streamlined and easy to use. If you have previously used iQ, you'll be excited to learn that Q Deals will now be auto paid out – no more paperwork. All purchases will now be confirmed by the customer via one time code. First time LTF customers will be charged an Establishment fee, irrespective of how they applied.

TAKE CHARGE

Welcome allows partners to;

- originate **flexigroup** Mastercard products
- process LTF sales (including modification and cancellation of sales)
- view payout information
- take control of user management for their stores.
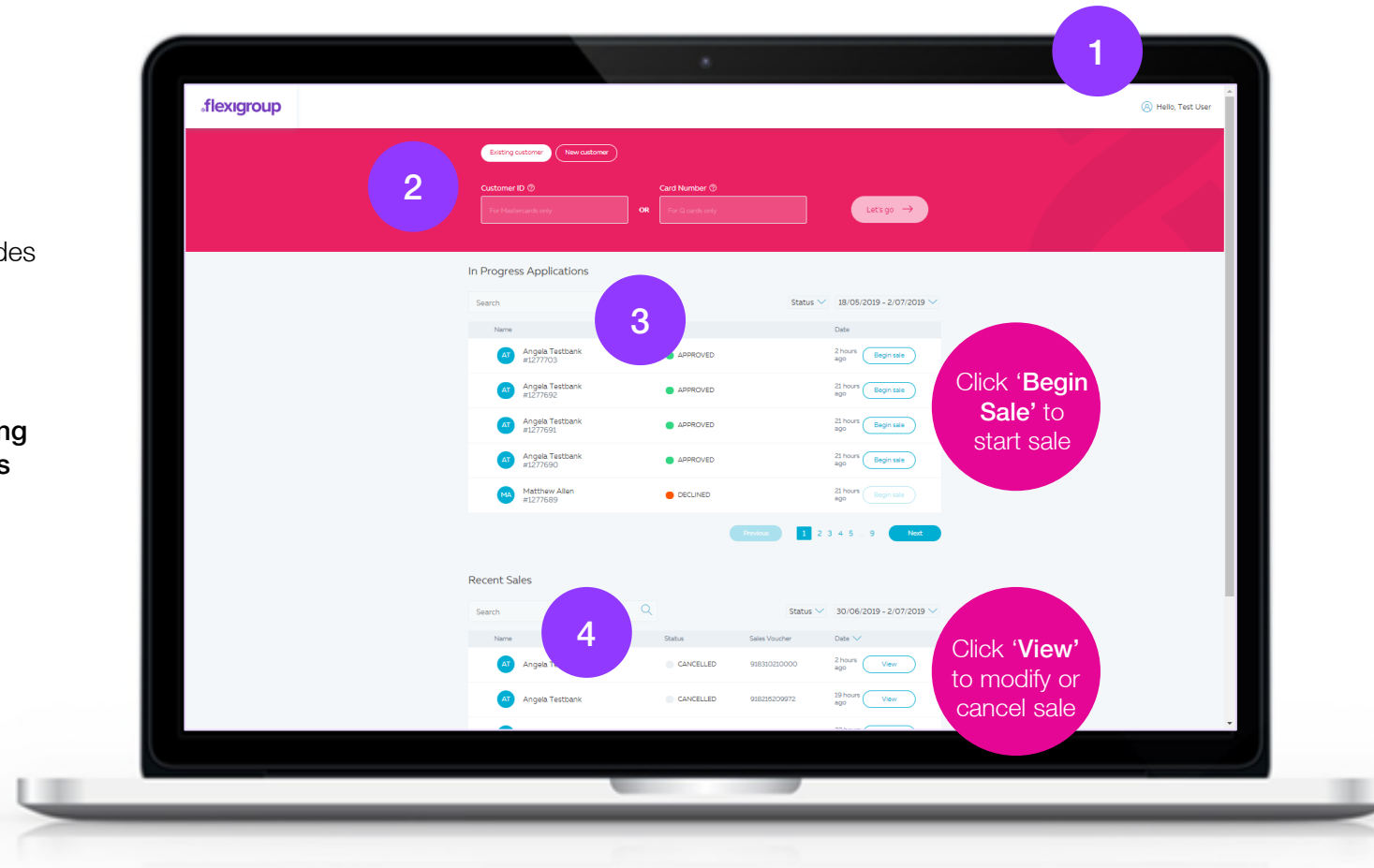
welcome
dashboard

1. **User management menu**

   - Account
   - Merchant Support (includes learning resources)
   - User Management
   - Payout Information
   - Logout

2. **Click to switch between existing customers and new customers**

3. **In progress applications**

4. **Recent sales**

new customer
application

STEP 1.

From the dashboard click **'New customer'**, check eligibility criteria, and **'Let's go'**
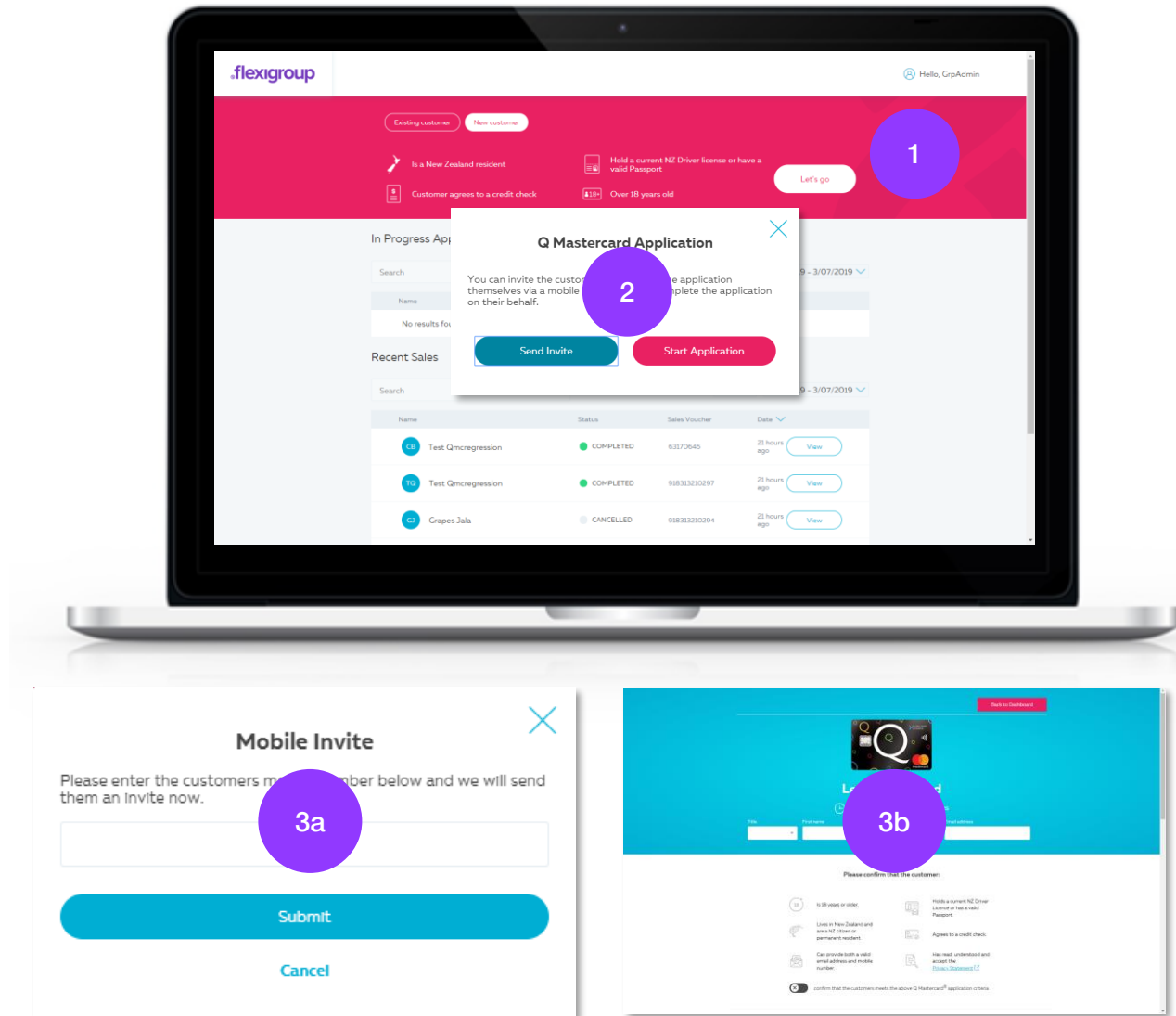
STEP 2.

Click **'Send Invite'** to invite the customer to complete the application via **Online Application (Hello)** or **'Start Application'** to complete the application on their behalf

STEP 3a.

Enter the customer's mobile number & click **'Submit'**

STEP 3b.

Complete the application on behalf of the customer

process **sale**

STEP 1a.

For existing customers, click **'Existing customer'** and enter the 10-digit Customer ID for Q Mastercard, Flight Centre Mastercard, and Farmers Mastercard or Card Number for Q Card, and click **'Let's go'**
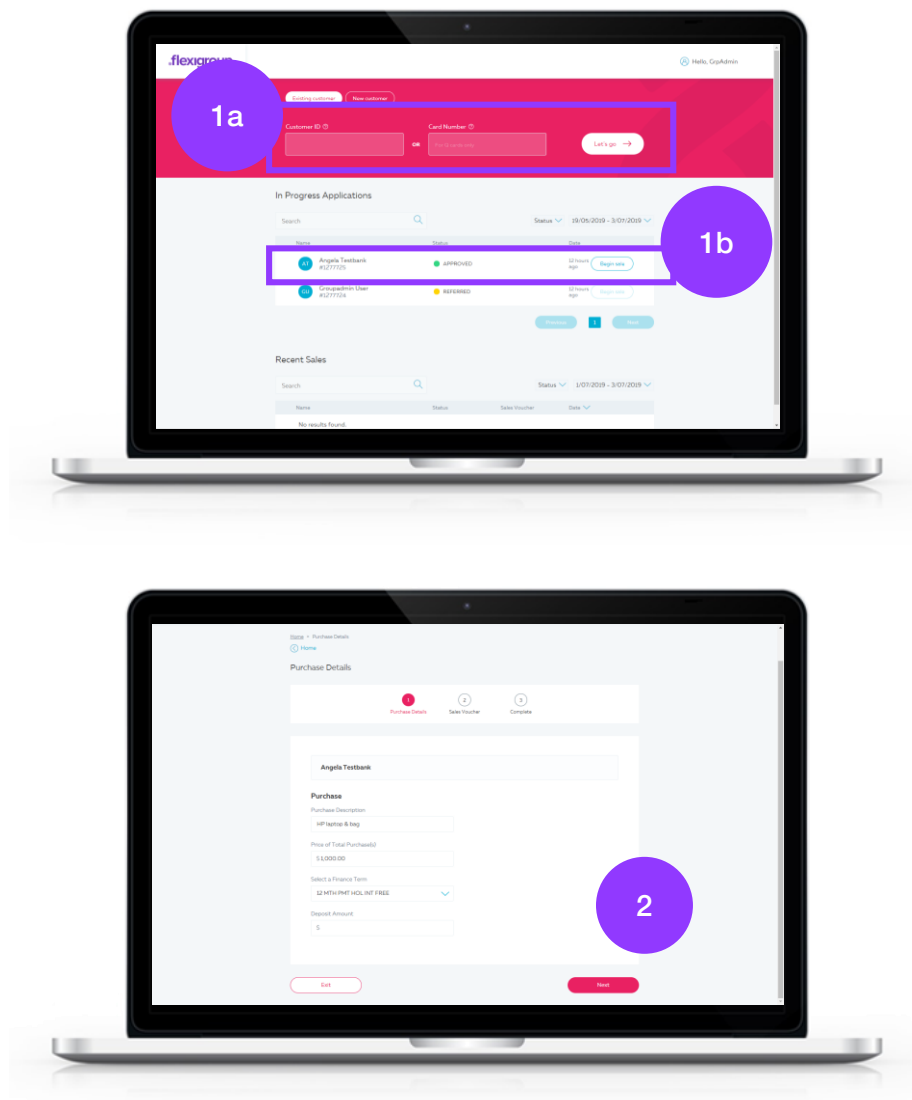
STEP 1b.

For recently approved customers, find the customer in **'In Progress Applications'** and Click **'Begin sale'**

STEP 2.

Complete the purchase details and click **'Submit'**

Note: you only need to complete one line summarising all items

The customer receives a preview of their sales voucher via email
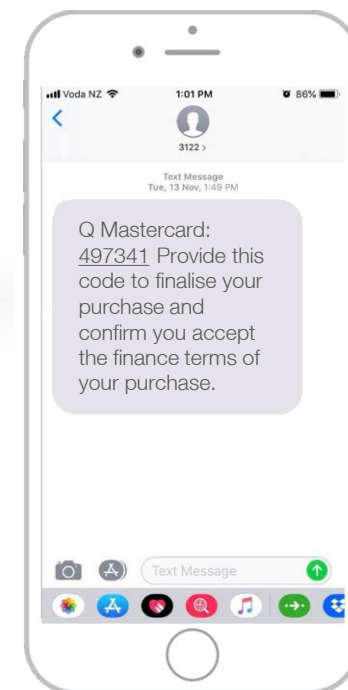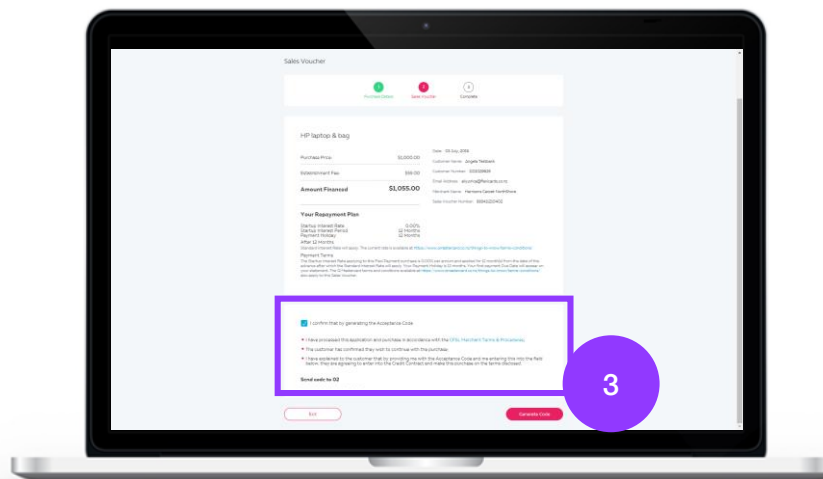
process **sale**

STEP 3.

Review the sales voucher and tick to confirm that by generating the Acceptance Code:

- You have processed this application and purchase in accordance with the CFSL Merchant Terms & Procedures;

- The customer has confirmed they wish to continue with the purchase;

- You have explained to the customer that by providing you with the Acceptance Code and you entering this into the field below, they are agreeing to enter into the Credit Contract and make this purchase on the terms disclosed.
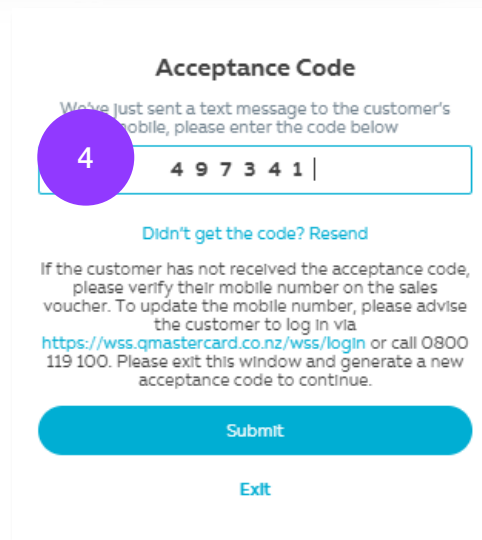
Click **'Generate Code'**

STEP 4.

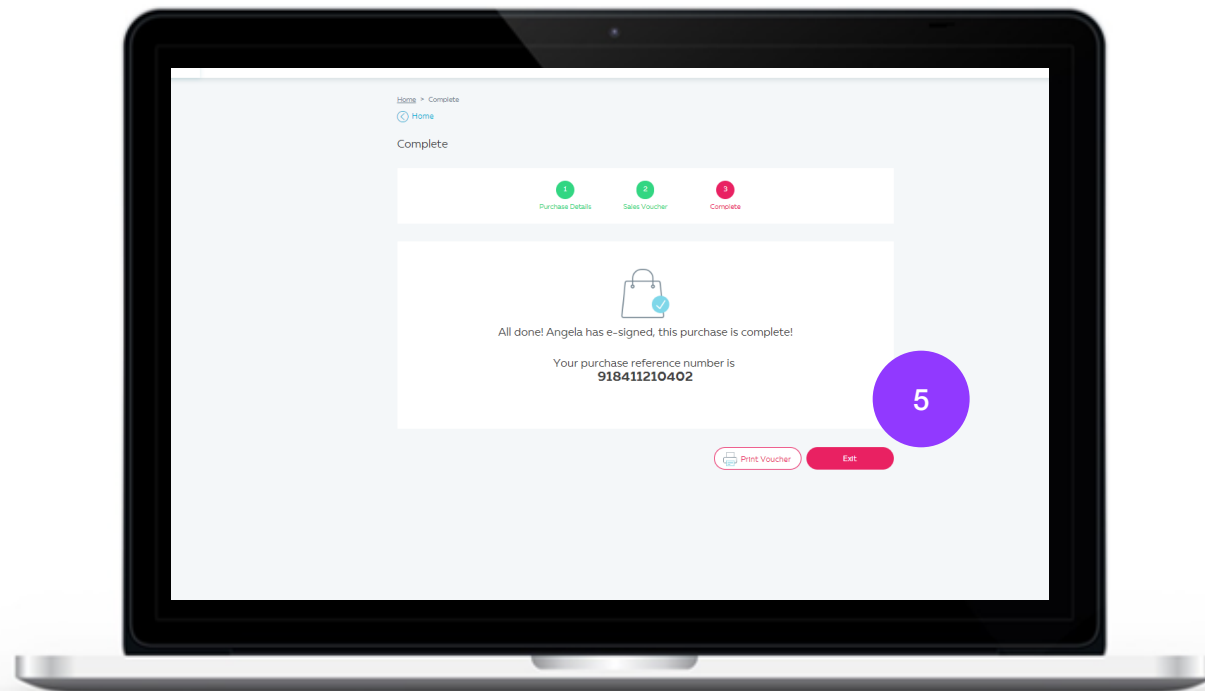Enter the Acceptance Code sent to the customer's mobile and click **'Submit'**

Merchant
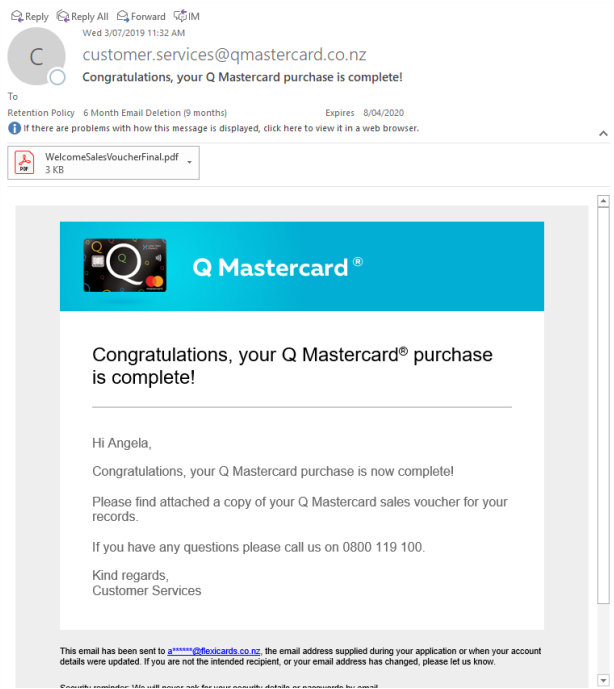
Customer

process **sale**

STEP 5.

The sale is now complete and the sales voucher is emailed to the customer

Click **'Exit'** or **'Home'** to return to the dashboard
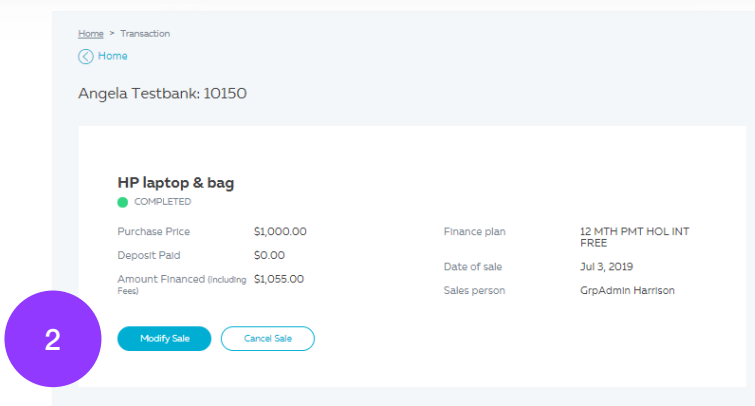
modify or cancel sale

STEP 1.

From the dashboard, find the sale in **'Recent Sales'** and click **'View'**

STEP 2.

Click **'Modify Sale'** to decrease the purchase price or **'Cancel Sale'** to cancel
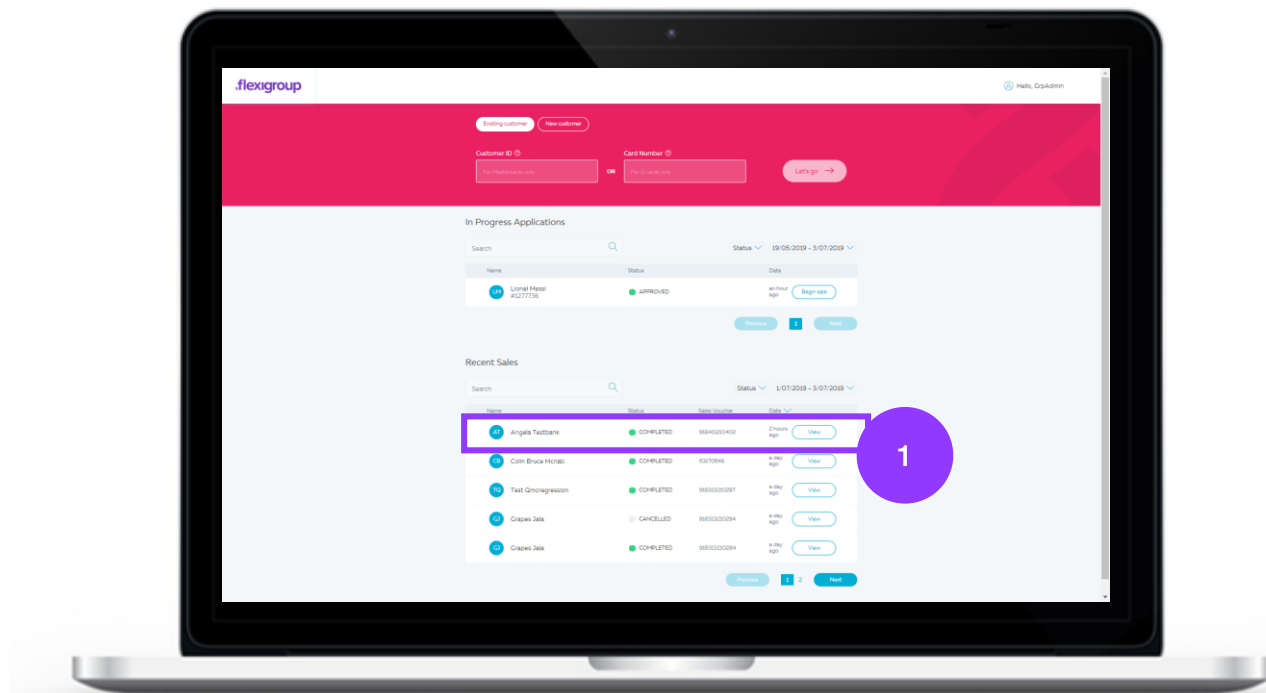
modify or cancel sale

STEP 3a.

To modify a sale, enter the amount to credit to the customer's account and click **'Submit'**

The customer receives email confirmation of partial refund of their purchase

STEP 3b.

To cancel a sale, confirm cancellation by clicking **'Yes, cancel the sale'**

The customer receives email confirmation of cancellation of their purchase
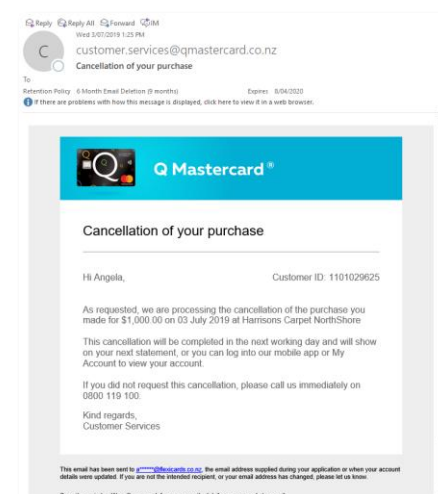
store & group
administrator
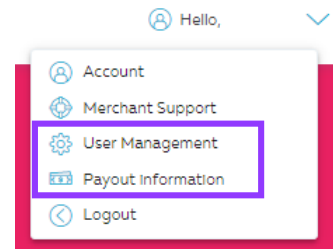
PAYOUT INFORMATION
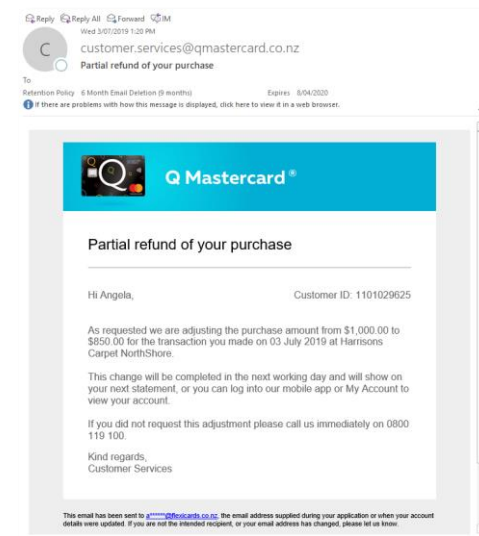
Filter based on store and date range. Click **'Download Excel'** on the right to download an Excel file with payout information.

You can download your payout information for the last 6 months in PDF or excel formats. If you require payout information which is not available in **Welcome**, please contact us on 0800 22 22 55.
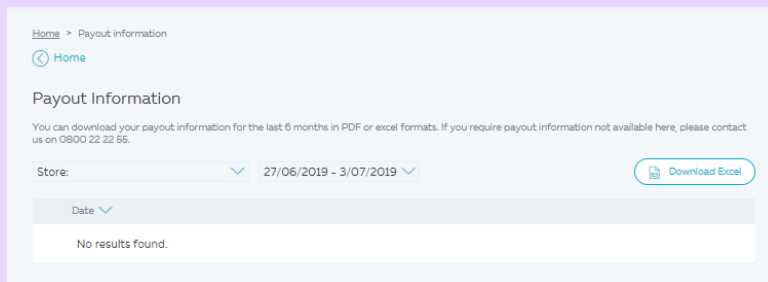
ADD USER

From **'User Management'** click **'Add user'**. If you are an admin for multiple stores, you can filter based on store

Complete the mandatory fields. The user will set their password using their date of birth, so make sure this is accurate. Set the login ID, user role, and add stores by clicking **'Add store'**. You can add multiple stores depending on your access level. Click **'Save'** and then **'Add user'**.

DELETE USER

From **'User Management'**, search for the staff member whose profile you would like to delete. Click the arrow to the right of the staff member. To delete a staff member, click **'Delete User'**.

store & group administrator
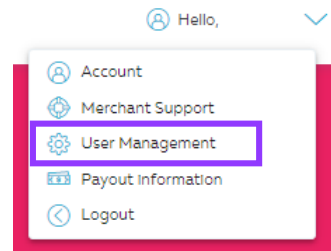
UPDATE USER PROFILES

Store and group admins can update profiles for users based at their store or group, respectively.

From **'User Management'**, search for the staff member whose profile you would like to edit. If you are an admin for multiple stores, you can filter based on store. Click the arrow to the right of the staff member. Here you can update personal and user details for the staff member.

Click **'Update Details'** to save the change.

ADD OR EDIT STORES

Group admins can add or edit stores for users based in their group.

From **'User Management'**, search for the staff member whose stores you would like to update. Click the arrow to the right of the staff member. Click **'Change Stores'** and search for the store you wish to add or scroll through the list. Tick the stores you want the user to have access to and click **'Save'**.

frequently asked questions

Q. How do I set up new staff?

A. Store and group admin can set up new staff members. Refer to page 9 for step-by-step instructions or watch the how-to video.

Q. How do I get a password for new staff?

A. Store and group admin set up new staff. Once an account has been created for the new staff member. The new staff member needs to set their password using **Forgot your password?** link on the login page. They will need their username and date of birth to action this.

Q. How do I reset my login and password?

A. Store and group admins can let you know your login username. You can reset your password by clicking **Forgot your password?** on the login page. You will need your username and date of birth to reset your password.

Q. How do we add admins?

A. Group admins can add store admins. To add a new group admin, contact flexigroup on 0800 22 22 55. Refer to page 10 for step-by-step instructions on how to update user profiles or watch the how-to video.

Q. How can a customer apply?

A. Customers can apply via Online Application or you can apply on their behalf. Refer to page 3 for step-by-step instructions or watch the how-to video.

Q. Can customer apply if on a work visa?

A. No, customers must be NZ Citizens or have permanent residency.

Q. The application timed out. Do I have to start again?

A. If the customer has not seen and accepted the Terms & Conditions on the final page, you will need to refresh your screen and start the application again.

Q. Can I check what additional information is required for applications in "Pending" status?

A. Pending is when we need additional information from the customers e.g. proof of address, a copy of their passports, or statement of position. At present, you will be unable to see what is required in **Welcome**. This functionality will be released as a future enhancement.

Q. Why has the application been referred?

A. There are a number of reasons the customers application can be referred from needing to validate the ID information provided, to already having an account with us. We can't disclose the reason an application has been referred to anyone except the customer due to privacy reasons.

frequently asked questions

Q. How do I check that the sale has been completed?

A. Find the sale in the **Recent Sales** section of the dashboard using the customer name, 10-digit customer ID, or the Sales Voucher. If a sale is completed, the status will be **Completed**.

Q. How do I park a sale?

A. Parking a sale is not an option at present for Welcome. This functionality will be released as a future enhancement.

Q. I can't find a sale from 5 minutes ago

A. You can view recent sales on the Welcome dashboard in the **Recent Sales** section. You can search for sales using the customer's name. 10-digit customer ID, or sales voucher.

Q. How do I cancel a sale?

A. Refer to page 7 for step-by-step instructions on how to cancel a sale or watch the how-to video.

Q. What terms do we have available at the moment?

A. Your active terms show in the drop-down menu on the purchase details page for long term finance purchases. Alternatively you can contact merchant support or your Area Sales Manager directly.

Q. How do I reprint a copy of the sales voucher/contract?

A. At the end of each purchase there is an option to print the sales voucher. The sales voucher is also emailed directly to the customer. There is not an option to re-print sales vouchers. However, you can view the purchase details using the recent sales section in the dashboard.

Q. Can I change the term on a contract?

A. No, you need to cancel and re-process the sale.

Q. How do I adjust the purchase price up or down? (Partial refund)

A. To adjust the purchase price down for **Q Mastercard**, **Flight Centre Mastercard**, and **Farmers Mastercard**; modify the sale. Refer to page 7 for step-by-step instructions or watch the how-to video. It is not possible to adjust the purchase price up. You will need to cancel the sale, and put it through again.

It is not possible to adjust the price down nor up for **Q Card**. You will need to cancel the sale, and put it through again.

Q. How do I get a payout advice?

A. Store and group admin can download payout advice for Q Mastercard, Flight Centre Mastercard, and Farmers Mastercard. Refer to page 9 for step-by-step instructions or watch the how-to video.

It is not possible download payout advice for **Q Card**. Q Card payout advice will continue to be emailed to your head office.