PayPoint

PayPoint One

Retailer Guide

Download your free PayPoint One app

GET IT ON Google Play

Your store in your pocket

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Welcome to PayPoint

As a PayPoint retailer, you'll get all of this as part of our commitment to you:

- Leading edge, cloud-based back office website for access anywhere, from any device
- Training and ongoing technical support
- Contact Centre support, available 365 days a year
- Online access to commission statements and more via MyPayPoint.com
- Commission credited to your bank account weekly
- Unique to PayPoint - Single Daily Settlement to offset money paid in and out, reducing your banking costs
- Access to an unrivalled portfolio of clients and products drawing customers to your store

Top tips for reducing costs and increasing commission

Reduce incoming cash

Card payments (including contactless) can be accepted for most transactions except for eMoney, money transfer and pre-paid card loads, which should always be paid for in cash. **PayPoint transactions must be free to customers.**

Special deals for PayPoint retailers

Having a network of over 28,500 retailers means we can negotiate exclusive deals to save you money. Check paypoint.com/deals for the latest information on where you can save money.

Pay out cash where possible

Reduce your cash banking with an in-store ATM (free-to-use and surcharge models available), cash out schemes such as energy credits through winter or by offering cashback with purchases (available via our card payments solution).

Promote high value products and services

You can earn commission on many PayPoint products including SIM cards and PayPoint ATM transactions. Offering these products not only attracts more customers and earns additional revenue, but also reduces banking charges.

Download the free PayPoint One app

Monitor sales as they happen, check stock levels while at the cash & carry, change prices instantly, create new products and send shelf edge labels to print in store remotely. F**unctionality will depend on your PayPoint One package.**

Train your staff

Access training videos and support directly through your PayPoint One Training app. Videos are also available at www.youtube.com/PayPointUK

Making the most of footfall

Entice your PayPoint customers to buy something when they're in store using the service. Put high markup items right near the till and place promotional products on the counter.

Use our free of charge POS

Promote your in-store services to customers with our free point of sale available to you, further signage is available at an additional cost. It won't take customers long to realise that they can do all of their transactions and shopping in one place.

Be socially present

Promote your store and engage with customers on social media by having your own Facebook and Twitter accounts. Use our free social media images to promote your store at www.paypoint.com/brandassets

Download the free PayPoint One app for your Android device from Google Play.

PayPoint banking guide

All Direct Debits are taken from your account early in the morning before the banks open, so sufficient funds must be cleared in your account by 3pm the working day before the Direct Debit is due.

Transaction day	Recommended day to bank PayPoint takings	Latest time to bank PayPoint takings	Direct Debit date and time (Banking after this time may result in a failed direct debit)
Monday	late Tuesday	3pm Wednesday	Before 9am Thursday
Tuesday	late Wednesday	3pm Thursday	Before 9am Friday
Wednesday	late Thursday	3pm Friday	Before 9am Monday
Thursday	late Friday	3pm Monday	Before 9am Tuesday
Friday	late Monday	3pm Tuesday	Before 9am Wednesday
Saturday	late Monday	3pm Tuesday	Before 9am Wednesday
Sunday	late Monday	3pm Tuesday	Before 9am Wednesday

Calculating your payments

Settlement Notices
Your PayPoint One will print Settlement Notices which tell you the value and date of the next Direct Debit which will be taken from your nominated PayPoint bank account. See page 57 for more information.

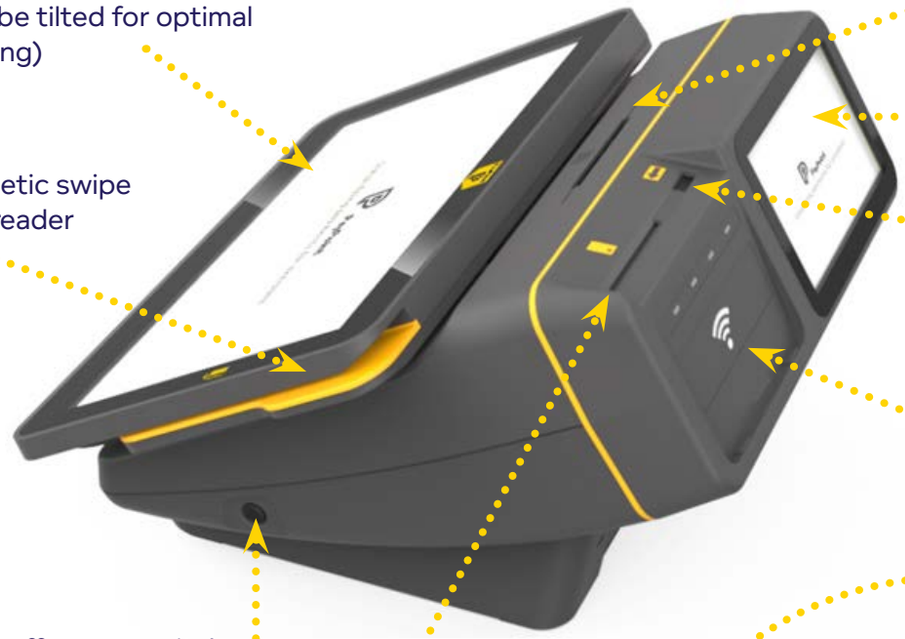
Z Report
You must **print a Z Report for each of your PayPoint One devices at the end of each day**. Your Z Report shows how much you have taken through the terminal since the last time it was polled and resets your totals. See page 54-55.

Top tips for successful PayPoint banking

1. Use your Settlement Notice, which shows the value and date of your next Direct Debit.
2. Bank by 3pm the day BEFORE the Direct Debit is due. If you bank on the same day the money is due, the direct debit is likely to fail, incurring charges from both PayPoint and your bank.
3. Consider using a dedicated bank account for your PayPoint direct debits.

Pay attention to your **Settlement Notices.** These tell you the value and date of your next Direct Debit. See page 57.

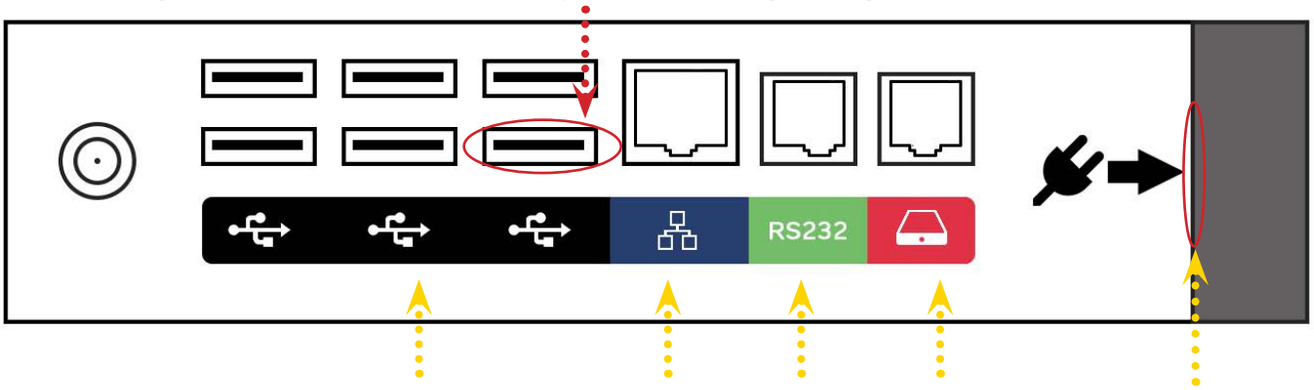
Getting started



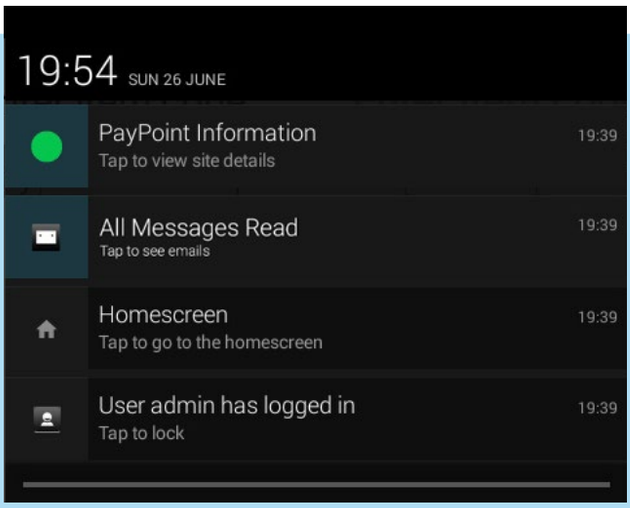
Remember: leave your device on overnight to receive important updates to keep it running smoothly

Let's get connected

We recommend you plug the PIN pad into the bottom right hand socket. Do not use to charge your mobile or any other device, it will affect the performance of your PayPoint One.



Device menu



Use this drop down menu to access the homescreen at any time.

Open menu: Swipe down from the top **left** hand corner of the screen to display the menu.

Close menu: Swipe up from the bottom of the menu to the top of the screen or tap anywhere else on the screen.

PayPoint Information – tap to show TID (terminal ID) and site details (address, site number etc.) and network connectivity status.

- **Green circle:** shows that the device has an internet connection.
- **Orange/red circle:** means that the device doesn't have an internet connection – unplug your Ethernet cable and plug it back in (should turn green after around 20 seconds) or reboot device if this persists.

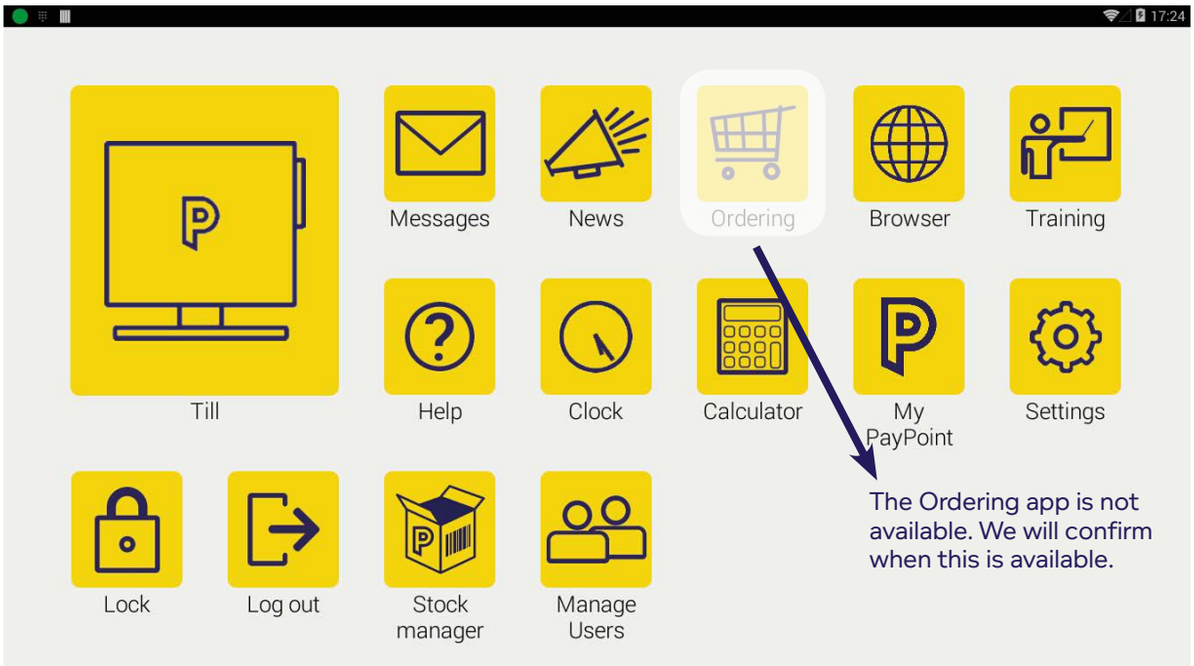
Message notification – this shows when there are unread messages in the inbox (Messages app). Please look at your messages regularly for updates.

Homescreen – use this link to return to the homescreen at any point (all apps can be found here).

User – shows which user is logged in.

If you have credit and debit card payment services, the menu will also show a green icon indicating that the PIN pad is plugged into the device, ready for use.

The homescreen



The PayPoint One homescreen has a range of helpful apps. Users will only be able to see the apps or features of the apps that they have permission to access (this can be changed in the **Manage Users** app):

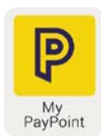
Till
This is where all transactions are processed, including PayPoint and EPoS transactions.

Messages
We'll send you messages with important updates. Messages may contain links to more detailed information in other sections. Check messages regularly. You can send messages to us too.

News
More detailed information and updates from PayPoint, such as new scheme launches and product information.

Training
This section contains instructions and tips for setting up and operating your device, including instructions for all transaction types.

Help
The most frequently asked questions and answers are here, so it's a great place to check before calling the Contact Centre.

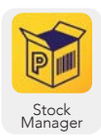


My PayPoint Back Office (my.paypoint.com)
Our web-based retailer hub known as the back office. Here you will be able to access many of your apps in one central place.

Settings
Adjust the device's brightness, volume, Wi-Fi and lock settings to suit your needs.

Lock
Quickly secure the device without logging out. When you tap to unlock the device, the same user will be asked to enter their password.

Logout
This will log out the existing user so a different user can log in. You should log out at the end of each day.



Stock Manager (EPoS Pro only)
This gives you full stock management with price and product maintenance.

Manage Users
As well as setting up an Admin user, you can also create Supervisors and Users. An account should be set up for each person in the store.

Setting up users

The Manage Users app allows you to define the system access of each user/member of staff. This is a security feature that provides significant benefits by:

- Identifying the till operator so that they are accountable for the transactions and payments made during their shift.
- Restricting ability to change prices, order products, complete refunds etc. according to each individual.

Admin

When you switch on your PayPoint One for the first time, you'll be asked to set up your store Admin. **You only have one Admin for the store so make sure you keep this password secure.** The Admin will always have maximum permissions. **Don't use this account to process transactions.**

User accounts

Supervisors

Users

By default Supervisors have full permission and Users have limited permission. You can change these permissions for an individual or for all Supervisors or Users.

Set up new Supervisors or Users in just a few seconds:

1. Go to the **Manage Users** app or tab on my.paypoint.com
2. Select the blue **Create new user** button.
3. Set a username and enter some specific information about the user, such as their first name, surname and birthday.

   Select whether the staff member needs a Supervisor or User account.
4. **When the user logs in for the first time they'll be forced to change the temporary password to a password they'll remember. Set a temporary password for the user, such as 12345678.**
5. In the permissions section, use the drop down arrow to expand each section. A tick indicates that the user has permission to do this task within the app. You can add or remove permission for each task in the list.

   By default, Supervisor accounts have full permissions.
6. Press **Create*** at the bottom of the screen to confirm setup.

   The user's name will appear in alphabetical order on the left side of the screen.
7. To successfully activate the new user, they should **log out and log back in** immediately with their username and temporary password. The screen will then ask them to change their password for security reasons.

*The **Create** button will only become available to press if all fields have been entered correctly.

If a user forgets their password, it can be reset on the device by the Admin or a Supervisor. Alternatively, call freephone 0800 310 0000 and we can reset it for you.

USERNAME TIPS

Usernames have a minimum of one character and cannot have any spaces. They can be numbers or letters (upper or lowercase). Usernames are not case sensitive.

Please be aware that usernames appear on the bottom of the customer's receipt so they know who served them.

PASSWORD TIPS

Supervisor and User passwords will be used several times each day.

Passwords must be **between 8 and 15 characters** and can be letters or numbers. For security reasons you should set a strong Admin password (e.g. at least 8 characters with a combination of letters and numbers).

Loading till rolls

1 **Tilt screen towards you**
Hold the base unit with one hand and use your other hand to gently, but firmly hold the top of the screen and pull it towards you, allowing access to the till roll holder.

2 **Open lid of till roll holder**
Gently press the yellow tab down to unlatch and open the lid towards you. The lid is hinged at the bottom.

3 **Check till roll holder**
Before loading a new roll, check that the holder is clear of any paper or empty till rolls.

4 **Load paper**
Make sure you load the roll the right way – the loose end needs to stick up at the back, from underneath the till roll. **The receipt prints customer facing.**

5 **Close lid**
Hold the end of the paper so it is sticking out when you close the lid. Tear off the excess paper.

6 **Reposition screen**
Gently push the screen back to a comfortable angle.

Ordering till rolls:

You will need to order till rolls when you run low on stock – **till rolls will NOT be sent automatically.**

You can purchase till rolls from any reputable supplier, you do not have to purchase them from us. If you would like to order till rolls from us, call freephone 0800 310 0000 with your site number ready. You will be advised of the current cost of the rolls when you place your order and the cost will be charged to your registered PayPoint bank account.

Till roll dimensions: 57mm x 75mm.

Using the Till app

EPoS Core/Pro

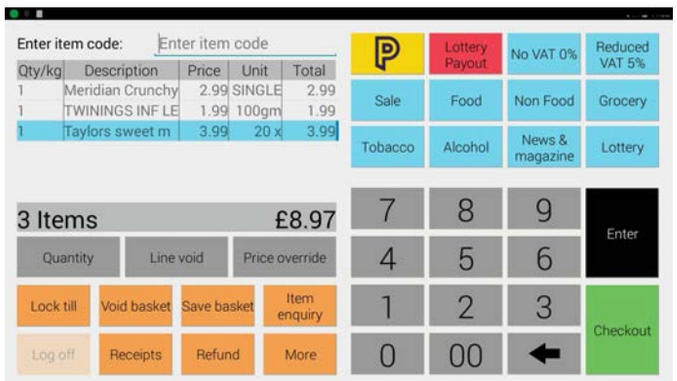
EPoS Pro

These icons indicate features that are **only available if you have EPoS Core or EPoS Pro.**

Upgrade your package to gain access to this feature, plus many more business benefits.

Visit www.paypoint.one for more information.

Processing transactions in the Till app



Go to the Till app to add items into the 'basket' - this can include PayPoint transactions and non-PayPoint items being purchased in store.

Always make sure the basket is clear before starting a new transaction

Adding other items to a basket

EPoS Core/Pro

Scan or key in barcode
Stored products will instantly be placed into the basket at the correct price. Thousands of products are already stored, ready for you to set your own price. Additional products can be added quickly and easily (see product section on page 22 and 23).

Quick Sell buttons – category
1. Enter the value of the item e.g. £5.00
2. Select the relevant category using the appropriate blue Quick Sell button e.g. food
3. The item will appear in the basket at this value e.g. £5.00 food

Quick Sell buttons – stored product
1. Select the product using the appropriate blue Quick Sell button.
2. The item will appear in the basket with the pre-set description and price.

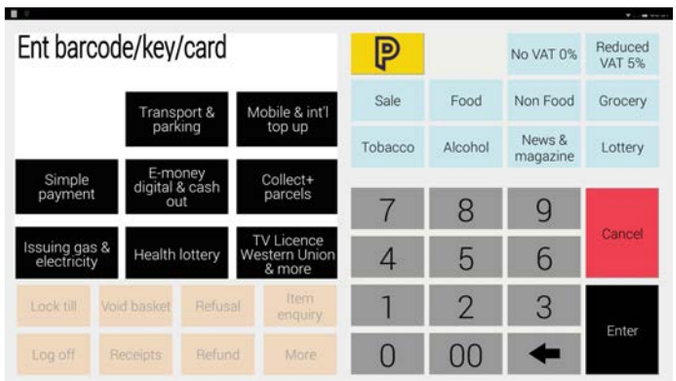
Make sure the basket is clear before starting a new transaction

IMPORTANT: Completing the transaction

When all items have been entered, **press the green checkout button to complete the transaction.**

1. Press the green checkout button
2. Tender payment for the transaction by:
   a) quick tender the exact amount in cash
   b) select a preset tender amount (cash)
   c) tender by cash, cheque, voucher or card (or with a combination of payment types)

Processing PayPoint transactions in the Till app



Go to the Till app to add items into the 'basket' - this can include PayPoint transactions and non-PayPoint items being purchased in store.

Always make sure the basket is clear before starting a new transaction

Adding PayPoint transactions to a basket

Electricity keys, gas cards & contactless (transport smart cards).

1. From the Till app screen, enter the key or card into the reader to start the transaction.
2. The PayPoint screens will automatically appear - follow the instructions on screen to confirm the item.
3. The PayPoint menu will disappear and the item will appear in the basket until checkout.

Keep the key or card in the reader until the device says it can be removed.

Other PayPoint transactions

1. Press the yellow PayPoint button.
2. Follow the PayPoint menu to select the relevant item.
3. Follow the instructions on screen to confirm the item.
4. The PayPoint menu will disappear and the item will appear in the basket until checkout.

Multiple PayPoint transactions can be put into one basket. PayPoint transactions will only be confirmed when the basket checkout is completed.

IMPORTANT: Completing the transaction

When all items have been entered, **press the green checkout button to complete the transaction.**

1. Press the green checkout button
2. Tender payment for the transaction by:
   a) quick tender the exact amount in cash
   b) select a preset tender amount (cash)
   c) tender by cash, cheque, voucher or card (or with a combination of payment types)

PayPoint transactions

1

Electricity keys (1 per basket)
Insert the key with the arrow on the key facing the same way as the arrow on the device. **You must leave the key in the reader until the transaction checkout has been completed** and you see instructions on the screen to remove it.

2

Gas cards (1 per basket)
Insert the card with the chip facing down and towards the customer. **You must leave the card in the reader until the transaction checkout has been completed** and you see instructions on the screen to remove it.

3

Swipe cards
Cards with a mag stripe, such as council tax or prepaid cards, should be swiped from top to bottom through the card reader on the right hand side with the strip facing down. The device will beep to indicate that the card has been recognised. If the card is damaged or doesn't have a magnetic stripe, the device won't beep. If the barcode won't scan, press the yellow PayPoint button, type in the long card number using the keypad on screen and press Enter.

4

Transport smart cards (1 per basket)
Contactless transport smart cards must be placed on the contactless reader at the front of the device. **You must leave the card placed against the reader until the transaction checkout has been completed** and you see instructions on the screen to remove it.

5

Barcode
Bills payable at PayPoint should have a barcode – scan this to process the payment, following the prompts on screen. If the barcode won't scan, press the yellow PayPoint button, type in the barcode using the keypad on screen and press Enter.

6

Touchscreen menu (yellow PayPoint button)
Use the menu to sell digital vouchers, mobile top-ups, parking payments, The Health Lottery and many other schemes.

You can process multiple PayPoint transactions in one basket. Leave the media in the readers until checkout is completed. You can have an electricity key and a gas card in the device at the same time.

Training

Remember to use the Training app for help and support 24/7.

Adjust quantity of item in basket

1. Using the touchscreen, select the item in the basket that you want to adjust the quantity for.
2. Select **Quantity.**
3. Using the number pad, enter the new quantity and press **OK.**
4. The basket will update with the new quantity and adjusted price.

Voiding line items

1. Using the touchscreen, select the line you want to void.
2. Check that the correct line is highlighted.
3. Select the grey **Line void** button.

Refusal

Only on EPoS Core/Pro

1. Select orange **More** button.
2. Select Admin tab.
3. Select the item in the basket and press **Refusal.**
4. Select the reason for the refusal. This will be recorded in the till events log.
5. You now need to void the line item/ basket following the instructions above.

Save & recall transactions

Only on EPoS Core/Pro

1. Add items into the basket.
2. Press the orange **Save basket** button.
3. You will be asked if you want to suspend the basket press **yes**.
4. To carry on with the transaction, press the orange **Recall basket** button.
5. A list of 'saved' transactions will appear on the right. It holds more than 100 transactions. Select the relevant transaction and press **Recall.**
6. The transaction will appear in the basket which can be checked out, voided or edited.

   The 'held' sales will remain on the system unless they are either recalled, checked out, voided or a Z report is run.

Discount the price of item in basket

1. Using the touchscreen, select the item in the basket that you want to change the price of.
2. Select **Price override.**
3. Using the number pad, enter the new price and press OK.

   You can only mark a price down and not up.
4. The basket will update with the new adjusted price.

Voiding whole basket

1. Select the orange **Void basket** button.
2. Press **Yes** to confirm.
3. Receipt prints to confirm void.

Processing integrated card payments

The PIN pad is contactless enabled (free service) - as well as contactless cards, the device can process payments from Apple Pay™ and Google Pay™ devices such as smartphones and wearable devices. Contactless payments are applicable for transactions of £30 or less.

1 Add goods into the basket

MAKE SURE THE BASKET IS CLEAR BEFORE STARTING A NEW TRANSACTION.
Once all items have been added to the basket, select the green **Checkout** button.

2

Select **card** as the tender type. There is no need to re-key the amount in the PIN pad, the amount will appear automatically on the PIN pad with the **full** amount. **Remember to double check the amount is correct.**

3 Place card on/in the PIN pad

The customer can place their contactless card or Apple/Android device on the PIN pad touchscreen or put the card into the PIN pad for chip and PIN.

The customer should follow the instructions on the PIN pad screen to complete the payment.

4 Receipts

Contactless – Contactless payments will only print one copy of the receipt for your records as the retailer (merchant copy) and not a customer receipt. This is an industry standard feature of all contactless card payments. If a customer wants a receipt of their contactless payment, you can print this from the duplicate receipt history.

Chip and PIN – PayPoint One will print two copies of the card payment receipt, a customer copy as well as a retailer (merchant) copy. **Make sure the receipt shows SALE.**

5 Important: Make sure the basket has cleared, indicating a successful sale.

Always check the card payment amount is correct before committing the sale.

PayPoint One will always print PayPoint transaction receipts, regardless of payment type.

Basket transaction receipts will print according to the settings you have selected i.e. always print, never print or prompted receipt print.

A maximum of £50 is available to customers paying by chip and PIN. If you would like this option removed, please call us on freephone 0800 310 0000 and we can change your settings.

Integrated PIN pad accepts all contactless and device payments.

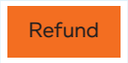
Reversing a PayPoint transaction

'Out of sequence' reversals are available on PayPoint One. The following rules apply when reversing a PayPoint transaction:

- You will need the customer receipt to get the AUTH CODE (PayPoint don't hold this information).
- If the transaction was within the last 1,000 transactions, you will be able to find the customer receipt in the duplicate receipt history under the orange **Receipts** button.
- Not all schemes are reversible - **if in doubt, try it out.**
- Transactions that have been hand keyed in are NOT reversible.
- Online transactions, Quantum and contactless smart cards must be reversed within 10 minutes.
- The transaction reverse must be completed before the device has polled or a Z report is run.

1 From the homescreen, open the Till app. Make sure the basket is clear.

2 Select the orange **Refund** button.



3 Don't enter the amount. Select the PayPoint 'P' button.

4 When prompted, enter the **TXN number** from the customer's receipt and press **Enter**.

5 Enter the **Auth code** printed on the customer receipt and press **Enter.**

6 Enter the reversal amount using the touchscreen keypad and press **Enter**.

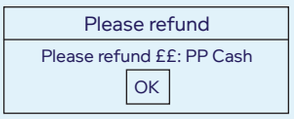
7 Enter, swipe or scan the original media (key, card or barcode) and hand this back to the customer. This is not required if the transaction was processed using the touchscreen.

8 The item/s will appear in the basket as a negative value. Press the green **Checkout** button.

9 Select the tender type. Follow the instructions on screen if the customer paid by card.

10 The screen will then tell you how much money the customer is due.

Select 'OK'



11 The item will be removed from the basket. Give the cash, media and receipts to the customer.

Reversing a store-bought transaction

1 From the homescreen, open the Till app. Make sure the basket is clear.

2 Select the orange **Refund** button.

3 Add products or amounts to be refunded into the basket in the normal way:

Scan or key in barcode
Stored products will instantly be placed into the basket at the correct price

Quick Sell buttons – category
1. Enter the value of the item
2. Select the relevant category using the appropriate blue Quick Sell button
3. The item will appear in the basket at this value

Quick Sell buttons – stored product
1. Select the product using the appropriate blue Quick Sell button
2. The item will appear in the basket with the pre-set description and price

EPoS Pro
You will be able to add a reason code for your refund. See page 49.

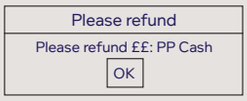
4 A negative amount will appear in the basket, meaning that this is the amount that the customer is due to be refunded.

5 Press the green **Checkout** button.

6 Select the tender type. Follow the instructions on screen if the customer paid by card.

7 The screen will then tell you how much money the customer is due.

Select 'OK'



8 The item will be removed from the basket.

View and print duplicate receipts

1 From the homescreen, open the Till app.

2 Select the orange **Receipts** button.

3 The last 1,000 transaction receipts will show – click on the one you need and a preview will appear on the right. You can scroll to view the receipt and check it's the right one.

4 If required, press **Print** and the duplicate receipt will print immediately. Some PayPoint transactions can't have duplicate receipts as the information is sensitive i.e. The Health Lottery.

5 Press the grey **Back** button to return to the Till app.

Product setup and maintenance

EPoS Core/Pro

EPoS Pro

These icons indicate features that are **only available if you have EPoS Core or EPoS Pro.**

Upgrade your package to gain access to this feature, plus many more business benefits.

Visit www.paypoint.one for more information.

EPoS category maintenance

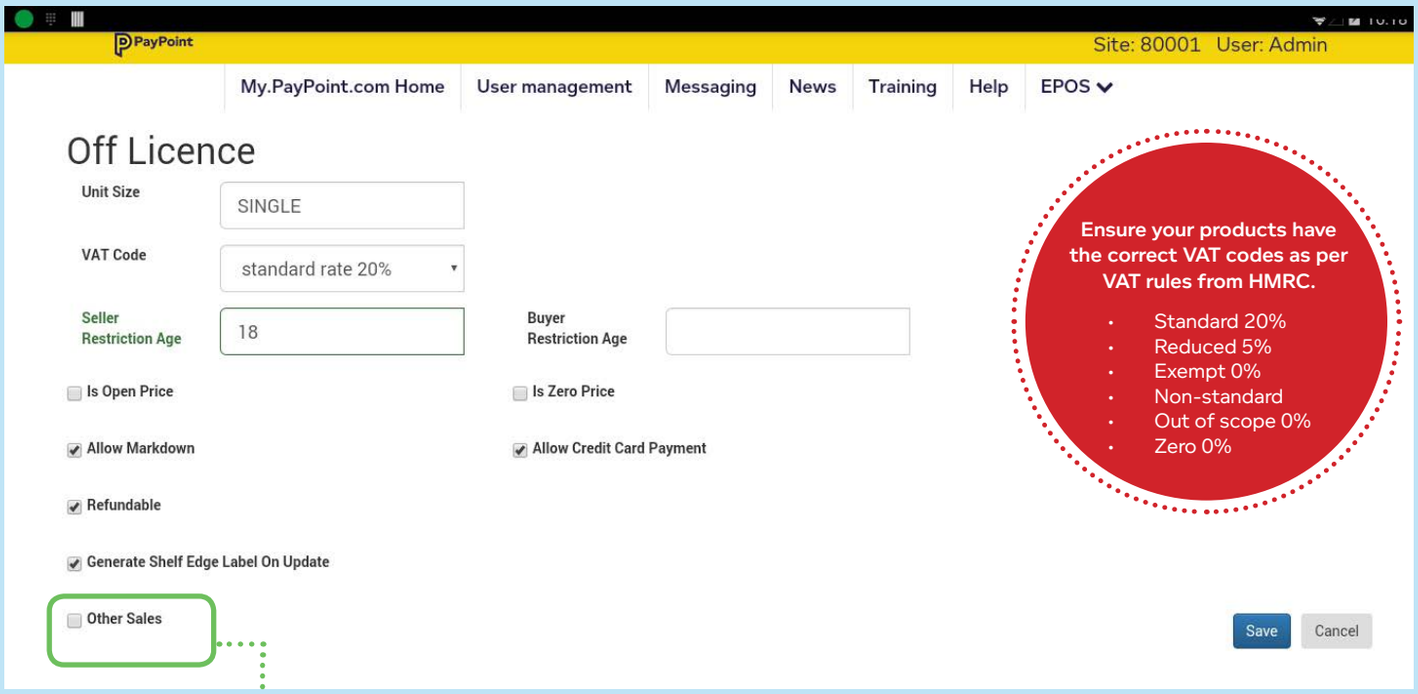
EPoS Core/Pro

Always set up product categories with suitable settings first and then set up the individual products linked to these categories so they automatically inherit the correct settings from the start.

For example, if you set up the seller and buyer restrictions to '18' under the Off Licence category, any **new** products added under the Off Licence category will inherit these settings automatically.

Existing products in the system will not automatically inherit the changes made to the category settings. You need to edit your products individually and resave the products.

LOCATION: my.paypoint.com > EPoS tab > EPoS Category Maintenance



Tick this option for commission based products and sales as they will be reported in a separate section on the X and Z reports e.g. Lottery and Scratch Cards.

Download the free PayPoint One app for your Android device from Google Play.

Do not add or save PayPoint transaction barcodes or swipe card details as products in your file, or as blue Quick Sell buttons on the Till app.

Product maintenance

EPoS Core/Pro

EPoS Core and Pro is pre-loaded with thousands of common convenience products. It's likely that about half of the products in your store will be pre-loaded so all you need to do is add your retail selling price and any additional back office information.

PayPoint transactions with barcodes, e.g. council tax bills, must be processed via the yellow 'P' button. This is very important to ensure customer payments are processed correctly and you receive the correct commission.

You will also be able to add your own products into your till system through the device, Stock Manager app or back office website.

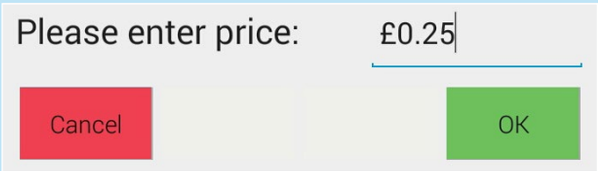
Ensure your products have the correct VAT codes as per VAT rules from HMRC.

- Standard 20%
- Reduced 5%
- Exempt 0%
- Non-standard
- Out of scope 0%
- Zero 0%

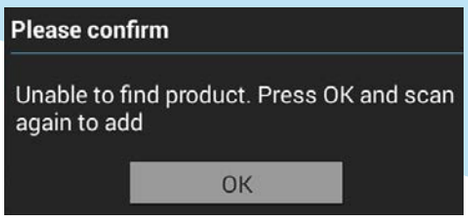
How to add your own products as you go "on the fly"

1 **Scan** the customer's product. Make sure you scan the linear barcode and not any QR codes.

2 If the product is already on the system, just add your retail selling price and press OK. This price will now be set for the product and can be edited under Item enquiry button.



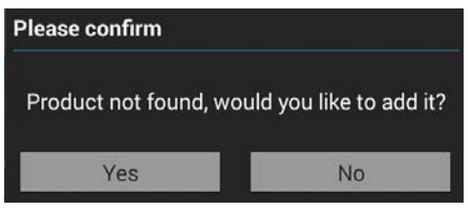
If the product is NOT on the system, follow the prompts on screen: Press OK



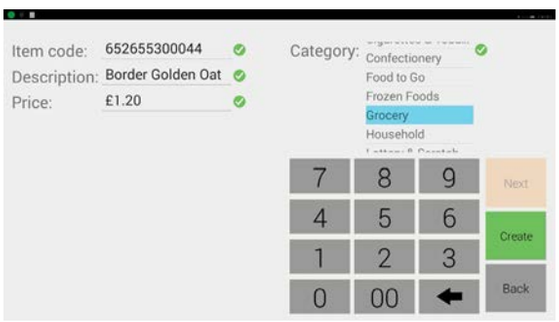
Scan the product again

You can do this on the free PayPoint One app available from Google Play

3 Press Yes



Fill in the description and price, assign the product to the most relevant category and press create. The item will then appear in the basket. You can edit the product under Product Maintenance on my.paypoint.com.



Do not add or save PayPoint transaction barcodes or swipe card details, as products in your file or as blue Quick Sell buttons on the Till app.

How to add your own products in the back office (with more details)

EPoS Core/Pro

	From the device:	From the back office website using a smart device or PC:
1	From the homescreen, open the Till app	Login to **my.paypoint.com** with your site number, device username and password
2	Select the orange **More** button	Select the **EPoS** tab
3	Under the back office tab, select **Products**	Select **EPoS Product Maintenance**

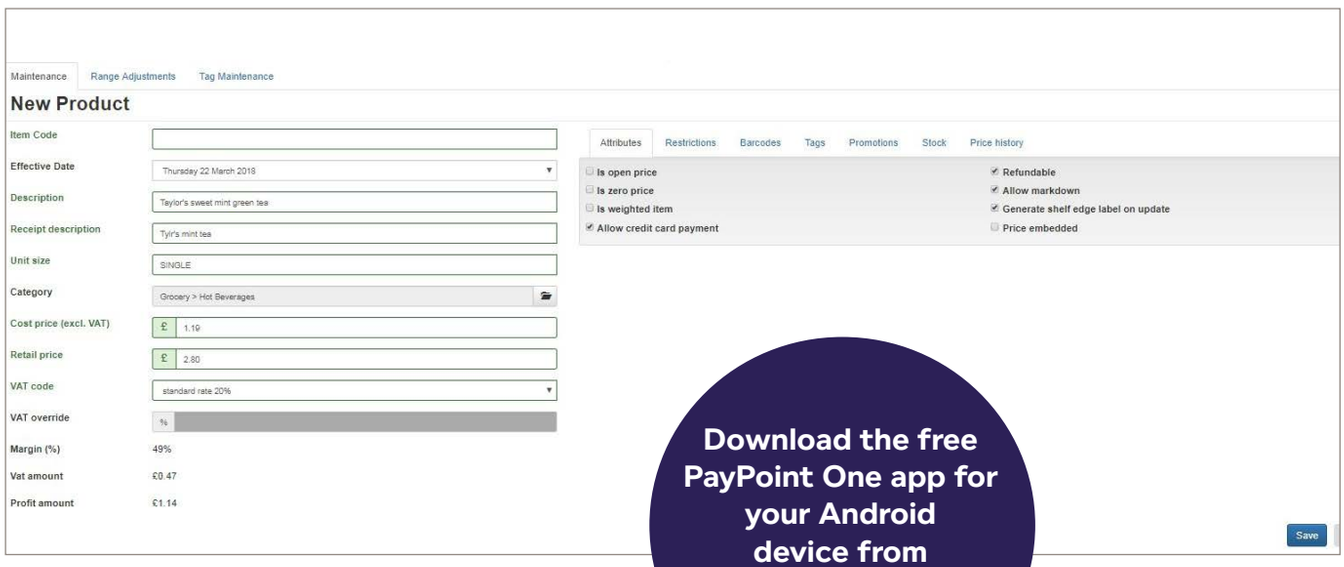
TOP TIP
Save time - Using the app or PC is the quickest way to add your products.

4 The **Select Product** screen is displayed where a list of available products will appear. You can search for items using a description, item code, unit size, price etc.

5 To add a new product, select **+ New Product**
(To maintain an existing product, select **Edit**)

6 The following mandatory items will need to be filled in:

- **Item code** - barcode number on product used to identify the product or your own reference number.
- Item **description**
- The **receipt description** will auto-fill to the first 15 characters of the product's description. This can be edited up to a maximum of 15 characters.
- Select the **category**
- Add the **retail price** which is what the product will be sold at. This needs to be greater than £0.00.



Download the free PayPoint One app for your Android device from Google Play.

7

The following information should be filled in for reporting purposes:

- **Unit size** is default as "Single". This can be changed to any description such as can, 500ml, 6 pack etc.
- **Cost price (excl. VAT)** can be filled in to show the profit made when the item is sold.
- **Margin (%)** automatically filled in when the cost and retail price is filled in.
- **Profit (amount)** automatically filled in when the cost and retail price is filled in.

8

Attributes tab:

The following boxes can be edited to suit the product:

- **Is open price** – used when the product's price can be changed as appropriate, such as loose fruit.
- **Is zero price** - used when an item is £0.00, such as a voucher or promotional item that must be accounted for.
- **Is weighted item (EPoS Pro only)** - used for weighted products that are sold by g/kg, see page 29.
- **Allow credit card payment** – ticked by default when adding a product. This item can be paid for using a debit or credit card.
- **Refundable** - ticked by default when adding a product. Item can be refunded.
- **Allow markdown** – ticked by default when adding a product. Used to allow a price override on a product.
- **Generate shelf edge label on update (EPoS Pro only)** – a shelf edge label is automatically created, ready to print, when a product's price changes, see page 28.
- **Price embedded (EPoS Pro only)** - used for products that have prices within the barcode, see page 29.

Restrictions tab:

- **Buyer restriction age** should be set for items that can only be purchased by customers above a certain age, such as Lottery, tobacco and alcohol.
- **Seller restriction age** should be set for items that can only be sold by staff above a certain age, such as Lottery, tobacco and alcohol.

Barcodes, Tags and Promotions tab (EPoS Core/Pro only):

- **Barcodes** - you can associate more than one barcode with a product, for example where a supplier issues an item in seasonal packaging under a unique barcode. **Remember to add the barcode.**
- **Tags** (key words) - these can be associated with a product to allow you to run promotions and reports on groups of products. Select the Tags tab, type in the word you want to use and press add. You can also remove a tag, see page 37-39.
- **Promotions** - Shows you if the product is included in any active promotions with the start and end date.

Stock tab:

- **Minimum stock level (EPoS Pro only)** – this is default as 0 per product. This can be changed to suit your needs and this will be used when you create suggested orders for your supplier/s.
- **Balance on hand (BOH) (EPoS Pro only)** – this is what the system thinks there is in stock. If this is incorrect, then it means that some of the products were not 'scanned out' at the sale. All products must be scanned out.
- **Balance on order (BOO) (EPoS Pro only)** – this shows that there is a pending order and how much stock is waiting to be delivered and booked into your store.
- **Active supplier (EPoS Pro only)** - this is where you associate an active supplier to a product for ordering purposes. You can have multiple suppliers per product, but only one active supplier and the cost price will change when you change the active supplier (i.e. where you're buying the product from). The supplier must be set up first before you can add it to a product.

Price history tab:

- **Price History (EPoS Core/Pro only)** - shows history of price changes for a product.

9

Once the item has been set up, press **Save. The item will be ready to sell immediately.**

Item enquiry

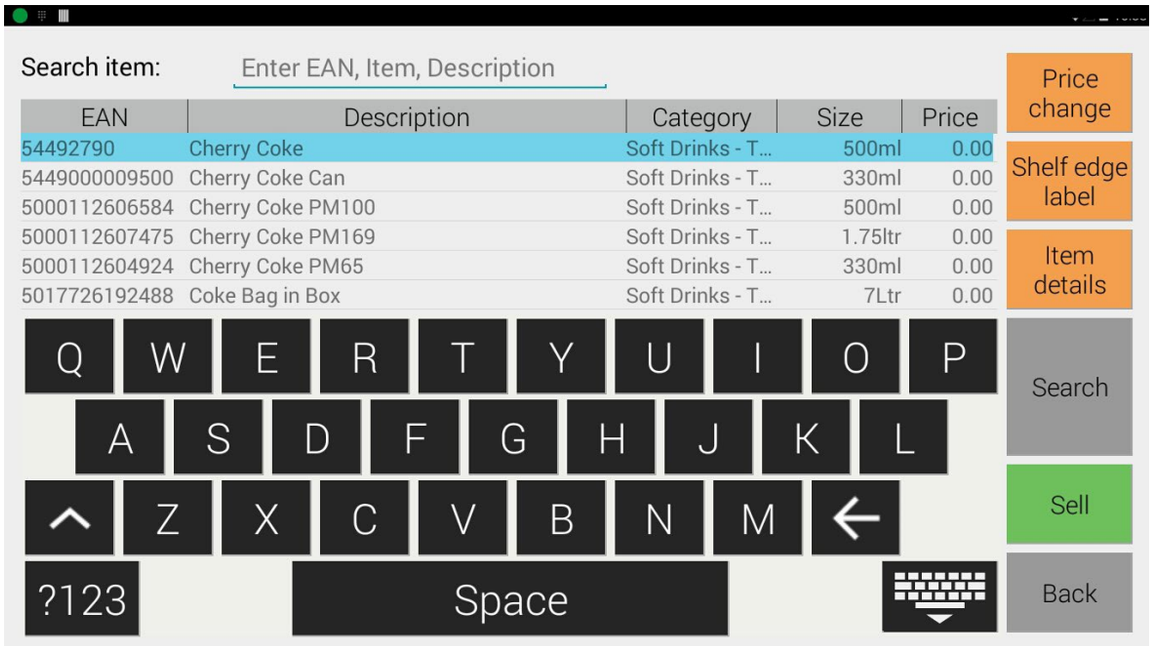
EPoS Core/Pro

1 Go to the **Till** app

2 Select the orange **Item enquiry** button

3 **Search for the product**

Scan the barcode, enter the barcode manually or search for the item name/description (or part of it). Depending on what you search for, you may get multiple results.



4 Select the item you want to look at. You can now:

1. Select **Price change** to change the price on this product permanently (each time it is scanned in future this new price will apply). Enter the new price using the keypad then press OK.
2. Print a **Shelf edge label** on the device, showing the product name, price and barcode.
3. Select **Item details** to take you to the product maintenance screen on my.paypoint.com where the item can be reviewed and edited.
4. Select **Sell** to add it into the basket.

Shelf edge label example

5 Press **Back** to return to the homescreen of the Till app.

Stock management features

EPoS Pro

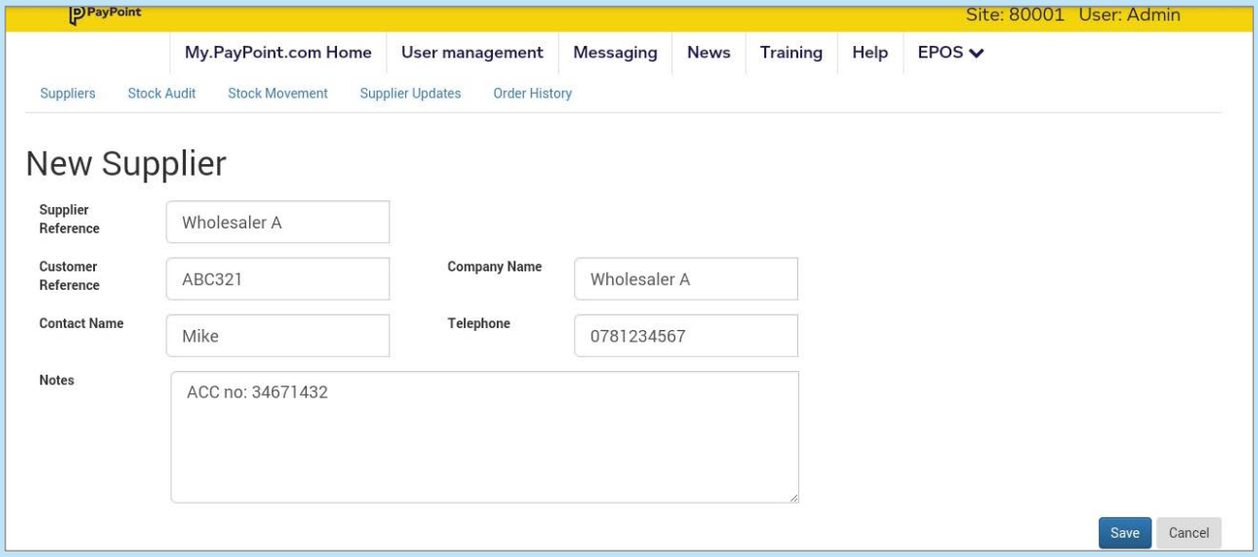
Supplier management

- Multiple suppliers can be set up in EPoS Pro and then be connected with each product they supply to you.
- Each stock item can have one or more suppliers registered against it – each showing their individual wholesale price.
- This needs to either be set manually, or will be dynamically updated when an integration is in place for that supplier.

1 Create a supplier

The purpose of creating a supplier is to associate a product to a supplier for ordering purposes.
You can create up to 100 suppliers and you can edit the information at any time.

LOCATION: my.paypoint.com > EPoS tab > EPoS Stock > Suppliers tab > New Supplier



- **Supplier reference:** your name or reference for the supplier i.e. Wholesaler A
- **Customer reference:** your account or customer number
- **Company name:** name of the supplier i.e. Wholesaler A
- **Contact name:** your account manager or contact for the supplier
- **Notes:** free text area can be used to enter websites, email addresses, credit limit information etc.

2 Add a supplier to a product

LOCATION: my.paypoint.com > EPoS Product Maintenance tab > select product

1. Within a product maintenance page, click on the Stock tab
2. Press the green **add supplier** button
3. Choose the supplier from the list.
4. You can then add more than one supplier to the list
5. Under **Current supplier**, activate the supplier for the product.
6. Press **save**

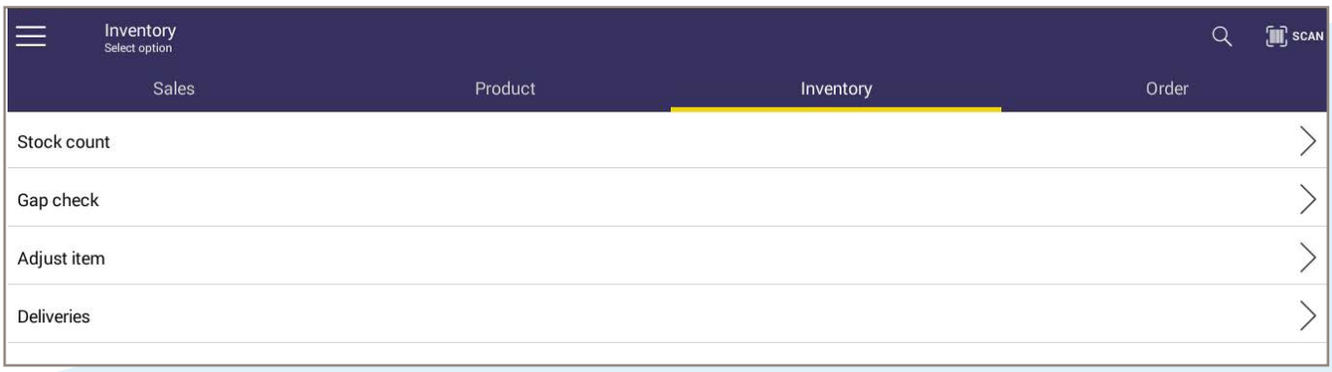
My Subscriptions
Applicable for retailers who are affiliated to Symbol Groups e.g. Nisa

Processes for inventory

EPoS Pro

LOCATION: Stock Manager app (via the terminal or Android smart device).

Within these options, you need to build lists of products, whether it's a stock count or delivery. Once you are happy with the list, **save it** and then **confirm** the list to update stock levels.



Stock count

Start with a **Go Live** stock count when setting your store up for the first time, adding a new product to the system or for a period of time, such as the festive season. This must include the stock you have in storage etc.
You can only do one stock count at one time on the system. Once your stock count has been completed, press the save button, then confirm that you are happy with it by pressing the chequered flag to confirm the list.

Gap check

This routine should be done daily to keep on top of your stock and avoid lost sales. Use this option when there is nothing left on the shelf for a product. This sets the product stock count to **zero** as there is a gap on the shelf and the system will show you what you should have on the shelf (variance of + or -).

Adjust item

Remove or add stock outside of the sales process where your balance on hand is updated.
Reasons for adjust items: out of date/not fit for resale, damaged, food production, product returned (fit for resale) and returned to supplier.

Deliveries

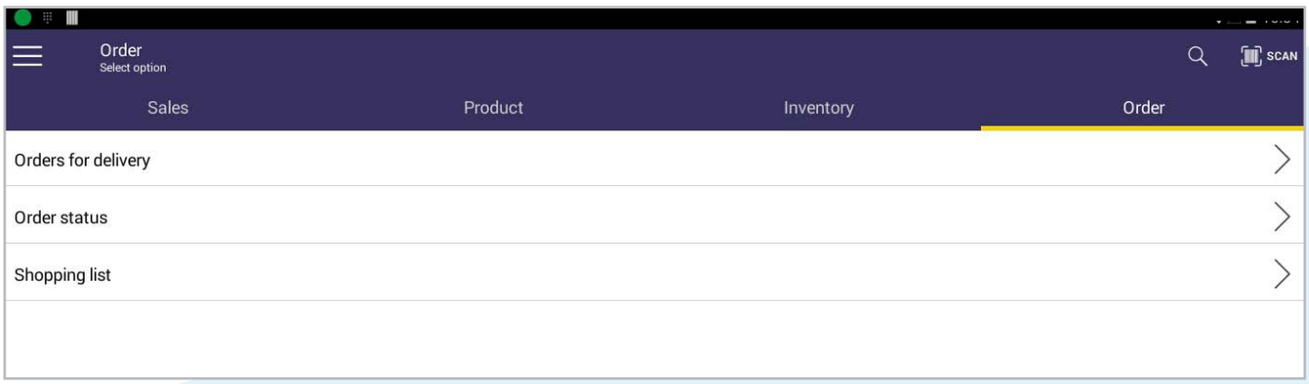
This adds stock into your store, either planned or unplanned (adhoc). From the list, select an out standing order to receive from the list or receive in an adhoc delivery (such as a shopping list from the Cash & Carry).

You will be able to edit the order for missing items, substitutes and extra stock. Once you have accepted the delivery, your product stock levels will update in the system.

Stock ordering

EPoS Pro

LOCATION: Stock Manager app (via the terminal or Android smart device).

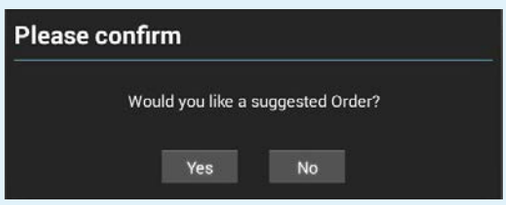


Orders for delivery

Select a supplier from the drop down options or if you just want a list of items to order without a supplier, leave as none. Press the next button (>).

Suggested orders

If you would like the system to calculate and generate a suggested order for your products with active suppliers, press **YES**. If you want to create your own list of products to order, press **NO** and build your own list. Suggested orders are based on your orders and what you've sold since your last delivery and takes into account your minimum stock levels that you've set up per product.



If you press yes, a list of suggested products to order will appear with a recommended quantity. Edit to suit your needs by deleting items, editing quantities and adding new items to the order.

Once you are happy with the list of products to order, press the save button, then confirm that you are happy with the list by pressing the chequered flag.

You will then need to login to **my.paypoint.com > EPOS tab > EPOS Stock > Stock Audit.** Your order will appear in the list where you can export or print it and send to your supplier via email or pick the items up from a Cash & Carry. If an order is no longer required, delete it using the red bin.

Order status

Shows you details of your orders in progress and the total cost value of the order, if you have set up cost prices against these products.

Shopping list

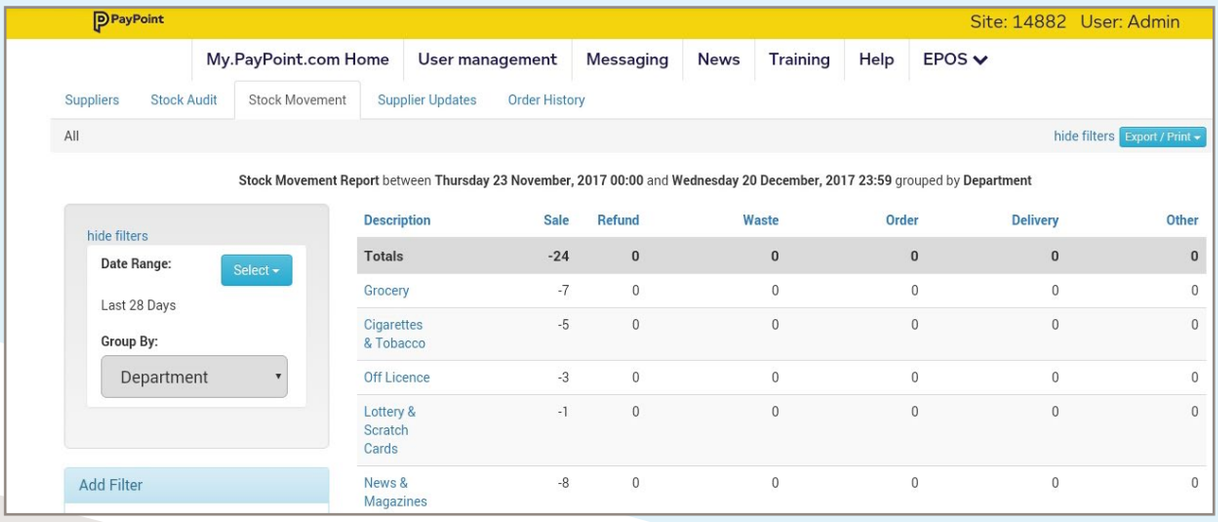
Allows you to create a shopping list for a supplier or no supplier, and can be suggested or not.

Stock movement report

EPoS Pro

LOCATION: my.paypoint.com > EPOS tab > EPOS Stock > Stock Movement

To find sales, refunds, waste, others (gap check, stock count and adjusted items), orders and deliveries. You can filter your date ranges and export/print this information from the back office on a PC or tablet and group by either the department, stock movements or day.

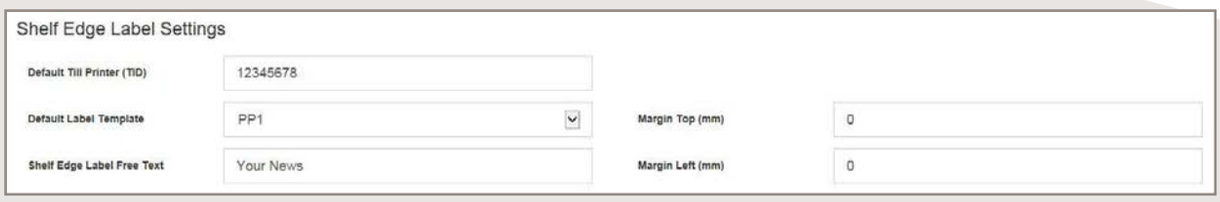


Description	Sale	Refund	Waste	Order	Delivery	Other
Totals	-24	0	0	0	0	0
Grocery	-7	0	0	0	0	0
Cigarettes & Tobacco	-5	0	0	0	0	0
Off Licence	-3	0	0	0	0	0
Lottery & Scratch Cards	-1	0	0	0	0	0
News & Magazines	-8	0	0	0	0	0

In-store marking features

Bulk printing shelf edge labels

The purpose of the shelf edge label is to provide information to the customer regarding the product on the shelf, such as product name, unit price and pack size. These shelf edge labels include a barcode which is used to do inventory management and product maintenance.



Shelf edge label settings:

LOCATION: my.paypoint.com > EPOS tab > EPOS Till Setup > Settings tab > Shelf Edge Label Settings

Default till printer (TID)

Enter the PayPoint One Terminal ID (on the terminal screen, swipe down from the top left where the internet circle is and click on PayPoint information). **In the unlikely event your terminal is swapped, please update the terminal ID to enable printing of shelf-edge labels on PayPoint One.**

Default label template

Used for specifying the default template size for printing. Choose PP1 for the labels to print from the till roll in the PayPoint One.

Shelf edge label free text

This will appear at the bottom of the label. Not available when printing via PayPoint One.

Margin top and left (mm)

Margin refers to the blank space around the text of the label. Margins can be specified in this field to print the labels accordingly.

Creating batches for print:

On the product maintenance page on my.paypoint.com, there is a box that is ticked by default called **'Generate shelf edge label on update'.** This means that when a product's price or description is updated, a shelf edge label will automatically be created in the back office for printing later.

You can also create your own batch to print (adhoc) to replace old labels.

AD-HOC BATCH

Contains the batch of shelf edge labels that require first time printing or re-printing. You can create this list whenever you need new labels printed in bulk.

SCHEDULED BATCH

Shelf edge labels of products where the description or retail price has been updated. There will be a list created on the day you made the changes and should be printed the same day to ensure the customer has the right product information.

You can do this on the free PayPoint One app available from Google Play

Printing shelf edge labels in bulk

LOCATION: Stock Manager app on the terminal or Android smart device

1. Under the Product tab > Shelf Edge Label
2. Create your own adhoc batch > Add your products by scanning the barcodes > Save and print to The PayPoint One* OR print a scheduled batch.

   *** You must be within the Till app for the labels to print.**
   A message will come up on the terminal screen to ask if you want the labels to print now.
3. The labels will print out in the same order of scanning them to help you when you fix them to the shelves.
4. Confirm that the batch printed correctly by pressing yes.

LOCATION: my.paypoint.com > EPOS tab > EPOS shelf edge labels

1. Create your own adhoc batch or print a scheduled batch.
2. Print your labels. You can print them from the PayPoint One (PP1)* or create a PDF to be printed from a dedicated label printer or an A4 printer.
3. The labels will print out in the order you select to help you when you fix them to the shelves.
4. Confirm that the batch printed correctly.

Weighted items

Products which are sold by weight instead of unit size or quantity. In order to sell these items, you have to setup the retail price and cost price per weight - this can either be set up per kilogram or per 100 grams.

Setting up and selling a weighted item

1. my.paypoint.com > EPOS > EPOS Product Maintenance
2. Search for the product to edit or add a new product
3. Tick Is weighted item (under the attributes tab) and select either per kg or 100g
4. Fill in the rest of the required information and press save. The product will be ready to sell immediately.
5. Use your own independent scales to weigh the item/s
6. In the Till app, make sure the basket is clear and type in the weight and relevant dump code. The system will calculate the price of the product per kg or 100g.
7. Once the basket is ready – check out and complete the sale.

Price Embedded barcodes

Barcodes that have the product price built into them, unlike the standard barcode which contains the product identifier and the price is retrieved from the system. They are commonly used in supermarkets and grocery stores for items purchased by weight, such as cold meats and cheese.

First 2 digits = mask
X = product code
Y = price
C = check digit

Setting up a price embedded mask

1. my.paypoint.com > EPOS > EPOS Till Set up > Settings > Embedded barcode masks.
2. Set up a mask e.g. 20xxxxyyyyyy on the basis of the price embedded barcode format provided by the supplier. Select the 2 digit mask and a mask for the product code and price length for your desired configuration. Press add.
3. Press save.

Description	Product Identifier Length	Price Length	Include Price Check Digit
02xxxxyyyyyy	4	6	No

Setting up a price embedded product

1. my.paypoint.com > EPOS > EPOS Product Maintenance
2. Search for the product to edit or add a new product (add all relevant product information).
3. Enter the unique product code e.g. '12345' (this code would be provided by the supplier and as a general rule, it is the four or five digit number that follows the first two digits of the barcode).
4. Tick **Price embedded** (under the attributes tab) – the cost and retail price become greyed out.
5. Under the barcodes tab, click on the drop down menu and add the correct mask.
6. Press Add and a barcode number will then be generated for the product.
7. Save the product – this will be available to sell immediately.

Examples:

2 065919 003083
Value of £3.08 when scanned at the till

2 065919 004639
Value of £4.63 when scanned at the till

2 065919 002994
Value of £2.99 when scanned at the till

2 065919 004998
Value of £4.99 when scanned at the till

2 065919 004578
Value of £4.57 when scanned at the till

2 065919 005018
Value of £5.01 when scanned at the till

The first circle: 02, This is the 'mask' and will always start with 02, 20 ,21 22, 23, 24, 25, 26, 27, 28, 29

The second circle: **87401** is the product identification code.

The third circle: this is the price you will see and here it is 01835 which is £18.35.

The last circle: this number 7 is a check digit which is used by the computer to check that it made a good scan.

National Lottery scheme

Setting up pink Lotto tickets as products

Product codes for Lotto tickets - provided by the supplier

Mask: 20xxxxxcyyyy

- **Lotto - 2083801**
- **EuroMillions - 2083803**
- **Thunderball - 2083804**
- **Lotto Hotpicks – 2083805**
- **EuroMillions HotPicks - 2083807**

Setting up a price embedded Lotto ticket:

Example of a EuroMillions ticket

1. Set up the mask - see page 29. Use mask 20xxxxxcyyyy.
2. Go to my.paypoint.com > EPOS > EPOS Product Maintenance
3. Add a new product
4. Enter item code e.g. 2083803
5. Description is the game type e.g. Euromillions ticket
6. Category should be **Lottery & Scratch Cards > Lottery tickets**
7. VAT code to be **out of scope 0%** which should be £0.00
8. **Untick the following:**
   "Is Open Price", "Allow Markdown", "Is Weighted Item", "Generate Shelf Edge Label on Update", "Is Zero price"
9. Tick "Allow credit card payment"
10. Untick "Refundable"
11. Tick **"Price embedded"** – the cost and retail price become greyed out.
12. On the right, under the Barcode tab, select the appropriate mask from the drop down (20xxxxxcyyyy)
13. Enter the product code. E.g. '83803'
    (As a general rule, it is the four or five digit number that follows the two digit prefix of the barcode).
14. Press the Add button. A barcode number will then be generated for the product.
15. Save the product – this will be available to sell immediately.

Barcodes for products with price embedded barcodes will be provided by the supplier.

There are normally two barcodes and one QR code printed on a Lotto ticket. It is important to understand which barcode should be scanned at the point of sale.

Important:

Always scan the barcode highlighted in green (top right hand side) and **do not** scan the barcodes highlighted in red.

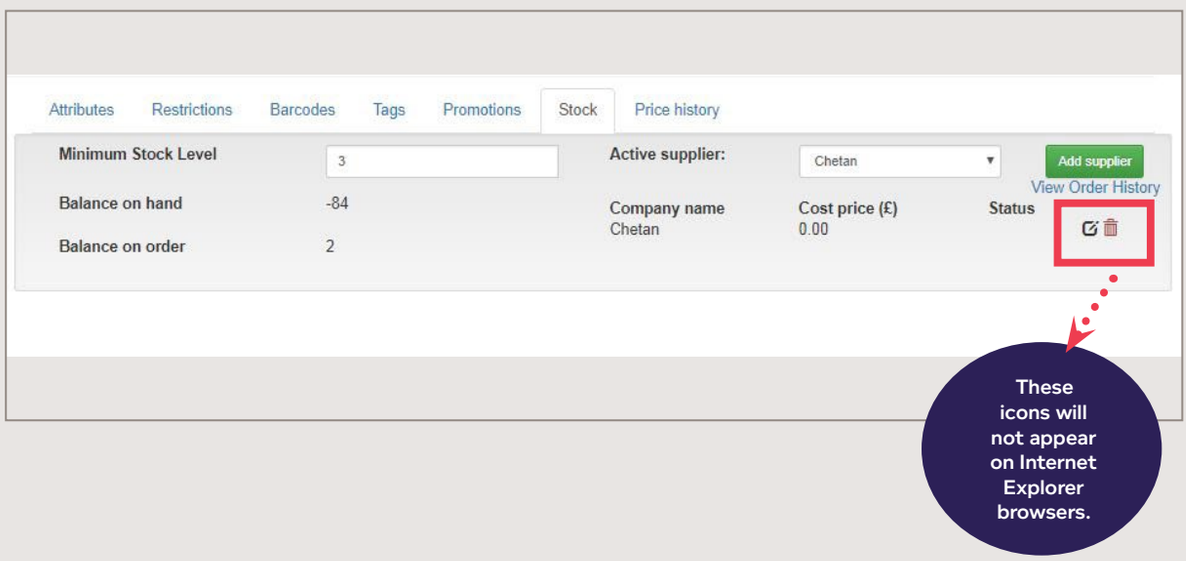
Pack sizes and outer package barcodes

EPoS Pro

You can now setup a product based on the outer package barcode and pack size e.g. a case of 24 cans.

Setting up a product based on pack size and outer barcode

1. my.paypoint.com > EPOS > EPOS Product Maintenance.
2. Search for the product to edit or add a new product.
3. Under the stock tab, add a supplier and make it active (see page 24).
4. Press the edit button (next to red bin). Not available on Internet Explorer browsers.
5. This pop up will appear showing the current pack size as 1. To create a new pack size and outer barcode, select the green **Add pack** button.



- **Cost price:** enter the cost price for the pack
- **Pack size:** enter the pack size of the item e.g. case of 24
- **Supplier item code:** you can enter another supplier item code or use the default code
- **Outer barcode:** scan the outer barcode
- **Is price marked:** tick or leave un-ticked
- **RRP:** enter the recommended retail price

6 Press the blue save button.

7 You will see two pack sizes: one for single units and the new pack size 24 with its own cost price which you will have created.

8 You can add multiple pack sizes to one product.

Things to note:

The cost price will automatically be calculated, but the RRP will not auto populate in the retail price field if you've ticked the price marked option and RRP option. You will still need to enter the RRP price manually.

When you now do an inventory count, shopping list or order and scan outer barcodes this will automatically show your pack size as 24 in your list (this can be edited).

You can do this on the free PayPoint One app available from Google Play

Range Adjustments

EPoS Pro

Range adjustments allow you to make changes to a range of products by type, brand or category. For example, increasing all soft drinks by 5p on a hot day or decreasing a seasonal range by 10% in a post-event sale.

LOCATION: my.paypoint.com > EPOS tab > Product Maintenance > Range Adjustment tab

1. Select how you want to adjust your range of products, such as price by £ or %.
2. Add the effective date and how much you want to adjust the products by.
3. Add the products, category or tag you want to apply the change to.
   The 5&9 rule will round up the amounts for you e.g. £1.72 will round up to £1.75
4. Click save to activate the changes. All prices will be adjusted according to your saved preferences.
   New shelf edge labels will be scheduled into a batch file so you can print at your convenience.

   Items that return as an error mean you don't sell them in your store.

Promotions setup and maintenance

EPoS Core/Pro

EPoS Pro

These icons indicate features that are **only available if you have EPoS Core or EPoS Pro.**

Upgrade your package to gain access to this feature, plus many more business benefits.

Visit www.paypoint.one for more information.

Promotions explained

Training

Remember to use the Training app for help and support 24/7

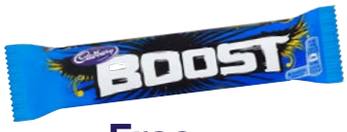
You can set up five types of promotions in EPoS Core or EPoS Pro:

1 Buy one get one free

If two of the item are added to the basket, the customer will only be charged for one.

99p

+



Free

= 99p

2 Fixed amount discount

If the item is added to the basket, a fixed amount will be deducted from the price of the item Example: £3 off a £9.99 item.

Was £9.99
Now £6.99

3 Percentage discount

If the item is added to the basket, a percentage amount will be deducted from the price of the item. Example: 20% off a £10.00 item would be £8.00 (% discounts are rounded down to the nearest whole pence).

20% off
Was £10.00
Now £8.00

4 X For Y style e.g. 3 for 2

If the right items (or number of items) are added to the basket, the price of one of the items will be deducted from the basket. Example: 3 boxes of (any) biscuits, the cheapest one is free.

£1.50

+

£1.50

+

~~£1.19~~
free

5 Fixed price style offer e.g. a meal deal

If a number of items are added to the basket, they will be sold for a fixed price. Example: Lunch deal of a sandwich, drink and crisps for £3.00

£2.50

+

£1.30

+

£0.60

= ~~£4.40~~
£3.00

Tagging products for promotions in EPoS Core and Pro

You can create promotions for products with multiple barcodes by "Tagging" products to link them together in a promotion. In Core you add the Tag to the individual product. In Pro you have the additional feature of "Tag Maintenance" in which you can create a Tag and then add the products to the Tag.

You can run promotions on groups of products:

Tags
Set a tag to run promotions on groups of products rather than individual items. Select the Tags tab on the product in my.paypoint.com, type in the word you want to use and press add. You can also remove a tag from a product.

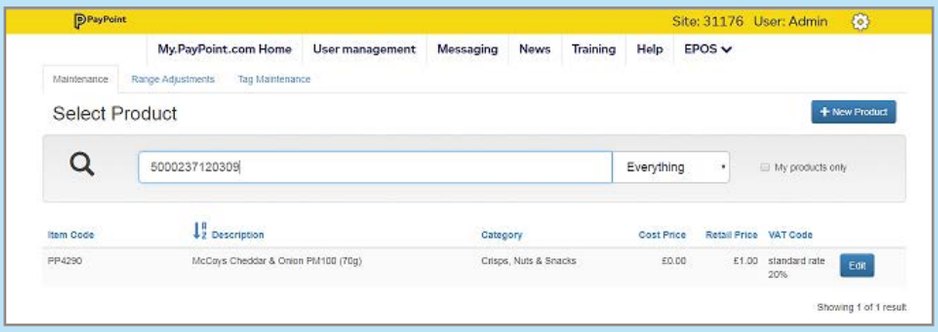
For example, you could tag all Cadbury chocolate bars as 'Cadbury' (in product maintenance) and then set up a buy one, get one free promotion based on the 'Cadbury' tag. This would apply the promotion to any basket that contains two 'Cadbury' items.

Category
When setting up each of your products (in product maintenance), you assign it to a product category. You can use these categories to run promotions on groups of products rather than individual items.

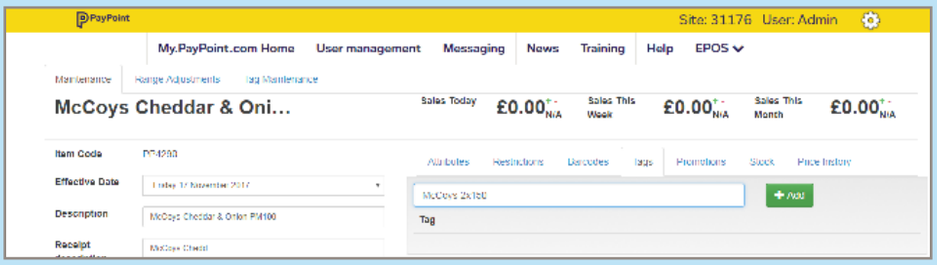
For example, if you've categorised a variety of chocolate bars in your store as 'chocolate' and then set up a buy one, get one free promotion based on the 'chocolate' category, this would apply the promotion to any basket that contains two 'chocolate' items.

Tagging in EPoS Core and EPoS Pro

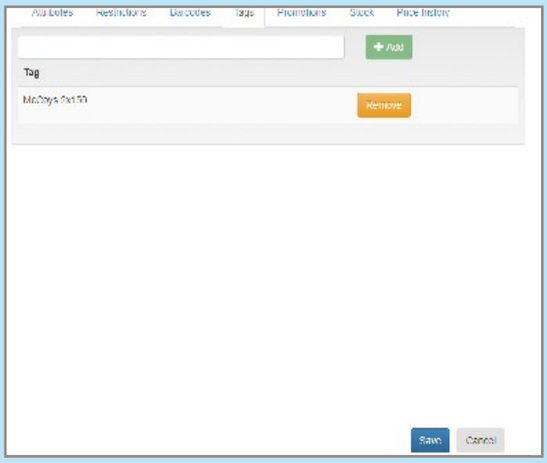
1 **LOCATION: my.paypoint.com > EPOS tab > EPOS Product Maintenance > Maintenance**



2 **Search for the product by scanning or typing a description > Click edit when found**



3 **Select the Tags tab > Type in your Tag > click Add**

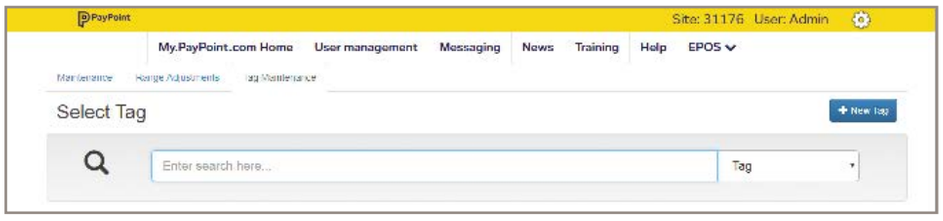


4 **When the Tag appears > click Save**
Repeat for all products you wish to tag for the promotion

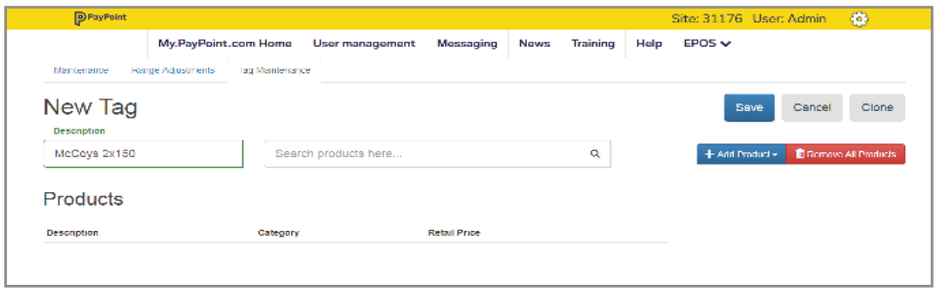
Tag Maintenance

EPoS Pro

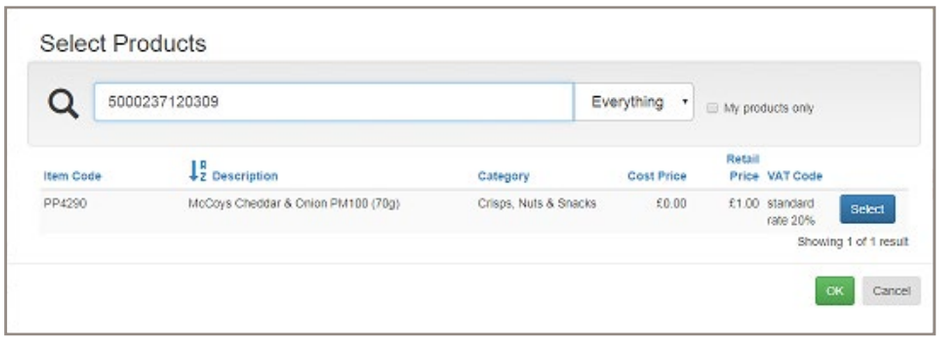
1 **LOCATION: my.paypoint.com > EPOS tab > EPOS Product Maintenance > Tag Maintenance**



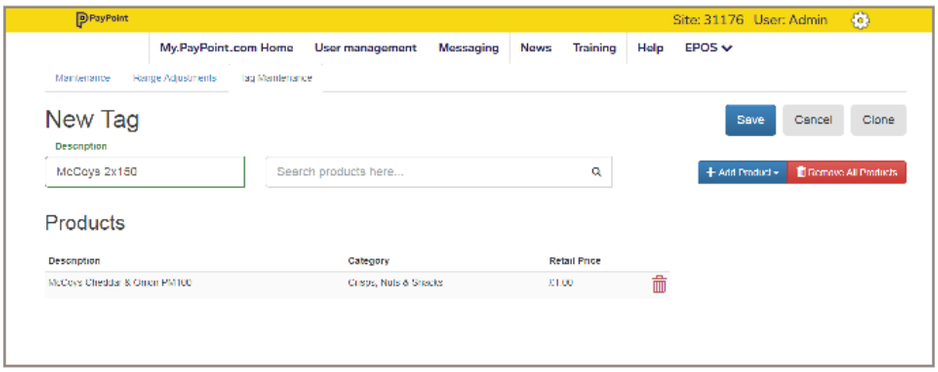
2 **Click new tag**



3 **Type in the description of your tag > Click add products, category or tag**



4 Search for the product by scanning or typing a description > Click select > Click OK



5 Repeat for all products you wish to tag for the promotion > Click save

Rules for all promotions

- Promotions are re-calculated each time a product is added to, or removed from a basket.
- Each item in the basket can only be used in one promotion. Each promotion line will show the promotion description and the discount amount.
- Within a promotion, the system will calculate the best deal for you as the retailer i.e. if the promotion is buy one get one free on the chocolate bar category, and a 60p Mars and 80p Bounty are added, the discount will be 60p.
- Between promotions, the system will attempt to calculate the best deal for the customer i.e. if an additional promotion of 50% off all sweets was added, that promotion would apply and the discount would be 70p.
- Items that are marked down will be excluded from promotions.
- You can limit which users can create and edit promotions, by changing permissions for an individual user or for all Supervisors or Users.

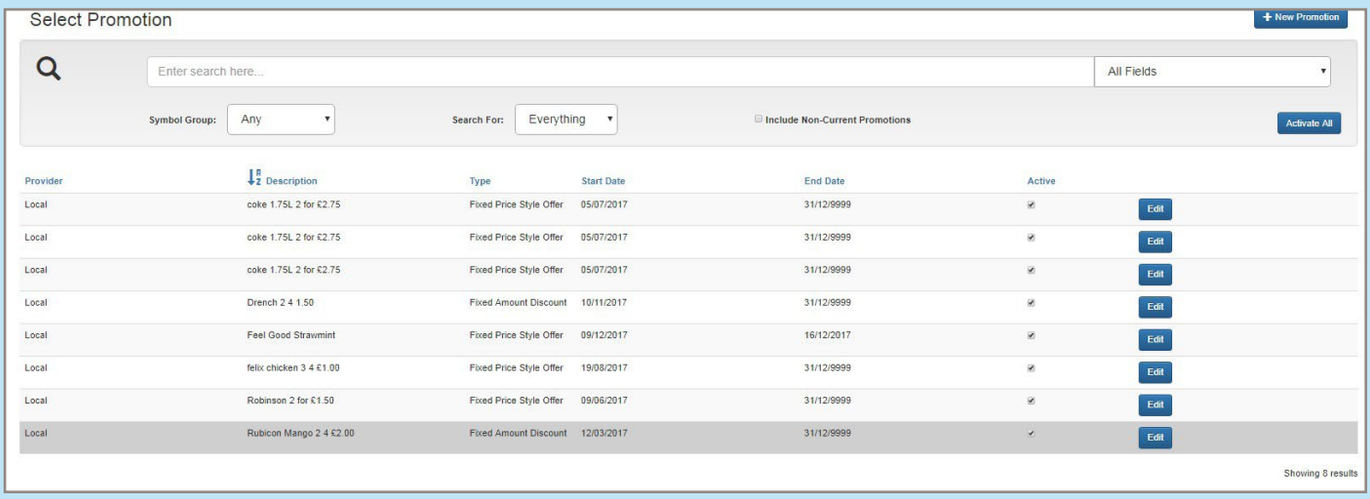
How to add promotions

EPoS Core/Pro

	From the device:	From the back office website using a smart device or PC:
1	From the homescreen, open the Till app.	Login to **my.paypoint.com** with your device username and password
2	Select the orange **More** button.	Select the **EPoS** tab.
3	Under the back office tab, select **Offers**.	Select **EPoS Promotion Maintenance**.

TOP TIP
Save time - using a smart device or PC is the quickest way to add your products.

4 The **Select Promotion** screen is displayed where a list of previously set-up promotions will appear. You can search for promotions using a description, start/end date, tag or promotion type.



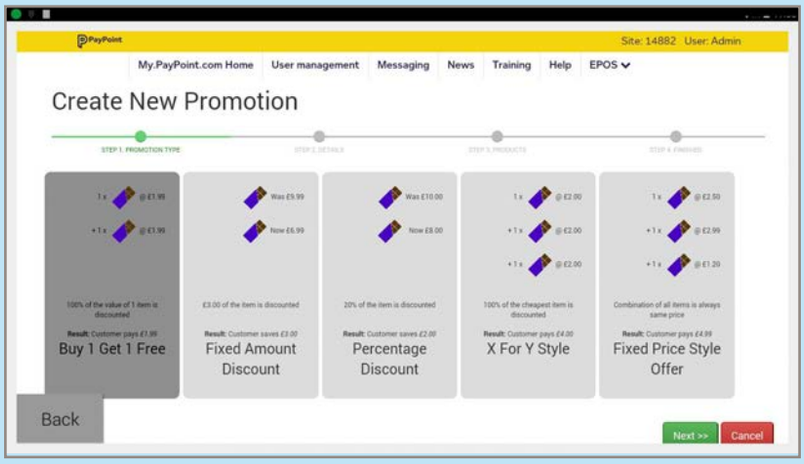
Provider	Description	Type	Start Date	End Date	Active	
Local	coke 1.75L 2 for £2.75	Fixed Price Style Offer	05/07/2017	31/12/9999	✓	Edit
Local	coke 1.75L 2 for £2.75	Fixed Price Style Offer	05/07/2017	31/12/9999	✓	Edit
Local	coke 1.75L 2 for £2.75	Fixed Price Style Offer	05/07/2017	31/12/9999	✓	Edit
Local	Drench 2 4 1.50	Fixed Amount Discount	10/11/2017	31/12/9999	✓	Edit
Local	Feel Good Strawmint	Fixed Price Style Offer	09/12/2017	16/12/2017	✓	Edit
Local	felix chicken 3 4 £1.00	Fixed Price Style Offer	19/08/2017	31/12/9999	✓	Edit
Local	Robinson 2 for £1.50	Fixed Price Style Offer	09/06/2017	31/12/9999	✓	Edit
Local	Rubicon Mango 2 4 £2.00	Fixed Amount Discount	12/03/2017	31/12/9999	✓	Edit

5

To add a new promotion, select **+New Promotion**. To maintain an existing promotion, select **Edit.**

6

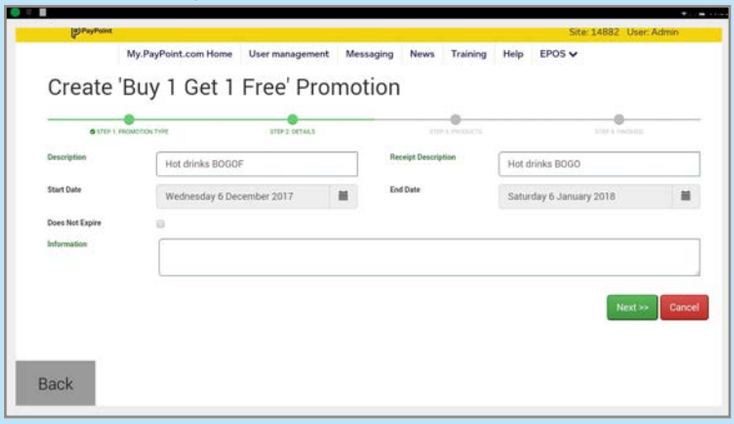
A four step wizard will appear. **Select the type** of promotion required and press **Next.**



7

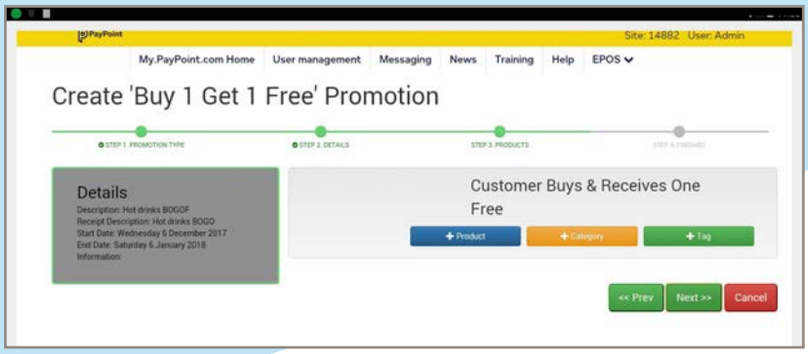
Insert the promotion **Details** including:

- Description
- Receipt Description (will auto-fill to the first 15 characters of the promotion's description. This can be edited up to a maximum of 15 characters.)
- Start date
- End date of the promotion (this will default to 1 week). If there is no end date tick the box to select 'does not expire'



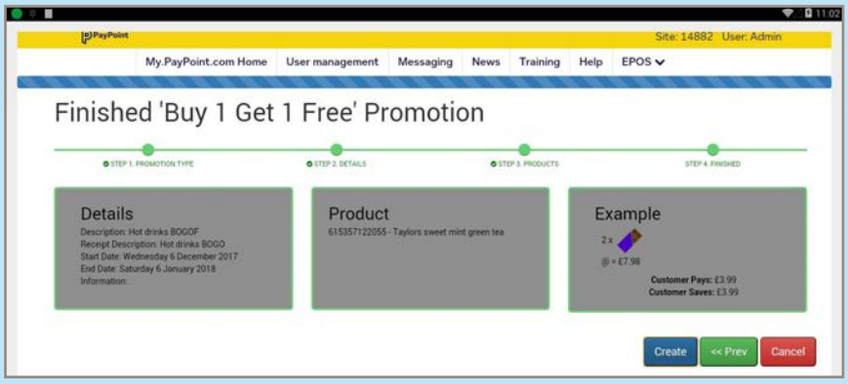
8

Add the **Products** (by scanning, searching or typing in the code of each product), **category** or **tags** that will be on promotion and press **Next.**



Check the **details** of the promotion and press **Create.** The promotion will get added to the front page of the promotion screen where it can be edited as required.

9



10 The promotion will be ready to use immediately if the start date is today.

For more detailed instructions refer to the Training section on your device or on the web back office at My.PayPoint.com

Extra functionality

EPoS Core/Pro

EPoS Pro

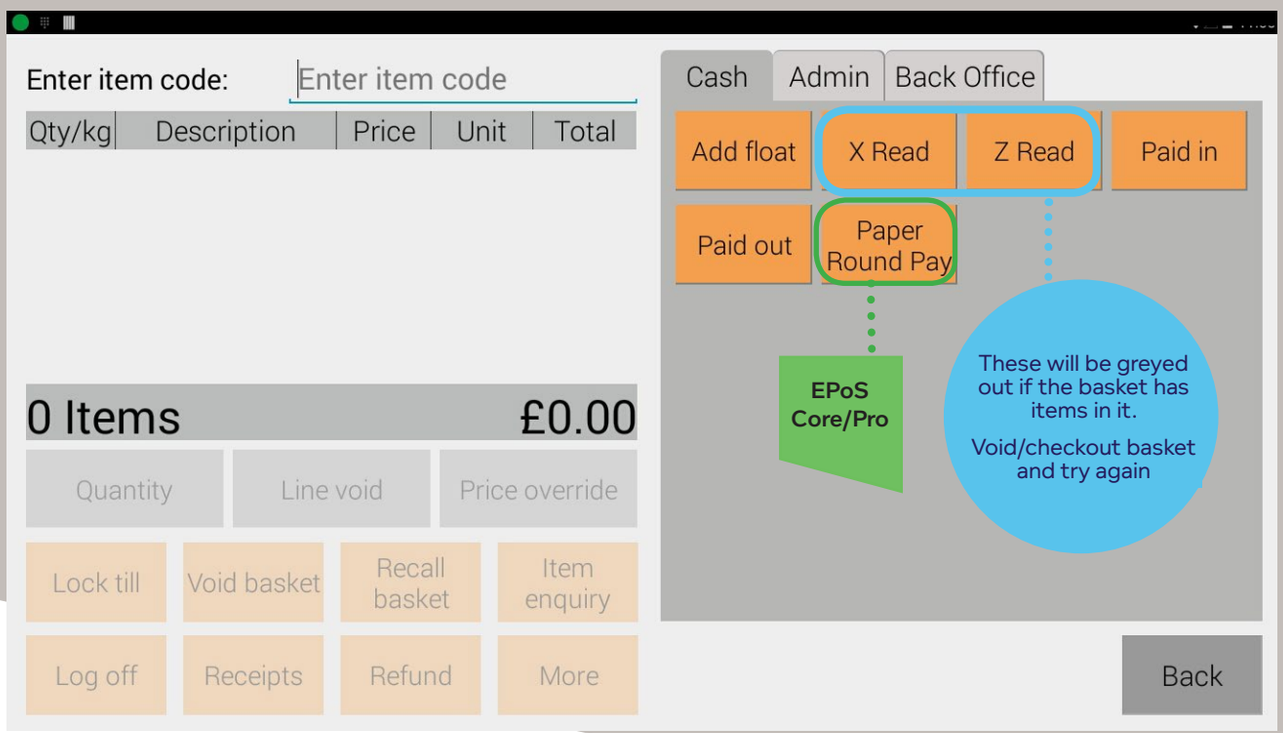
These icons indicate features that are **only available if you have EPoS Core or EPoS Pro.**

Upgrade your package to gain access to this feature, plus many more business benefits.

Visit www.paypoint.one for more information.

The More button

Cash menu

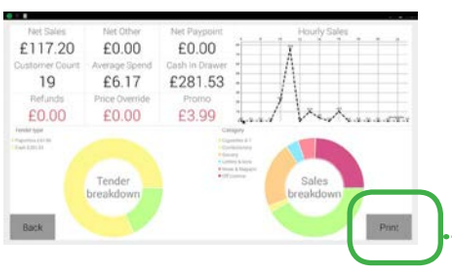


Add Float

When opening for the day or starting a new shift, you can record the value of the starting float to help with end of day reconciliation. This will appear on your X and Z Reports.

X and Z Reads

An **X Report (Shift Report)** will print the totals for the device, but will not reset them. The dashboard will appear before printing the report.



Click here to print X report

A **Z Report (End of Shift)** will show the totals for that shift and will reset the transactions to zero. You must run a Z Report for each device at the end of each working day. A Z Report run after midday will also trigger the device to upload the transactions to PayPoint and a Full Upload Report will also be printed after the Z Report. If you have card payments, an End of Day banking report will print too.

Both reports have the same format - see the reports section from page 54-55 for an explanation of your X and Z Reports.

Paid In

You can use this button to record if you are **adding cash to the drawer**, such as to add change or notes. This will appear on your X and Z Reports to help with your end of day reconciliation.

Paid Out

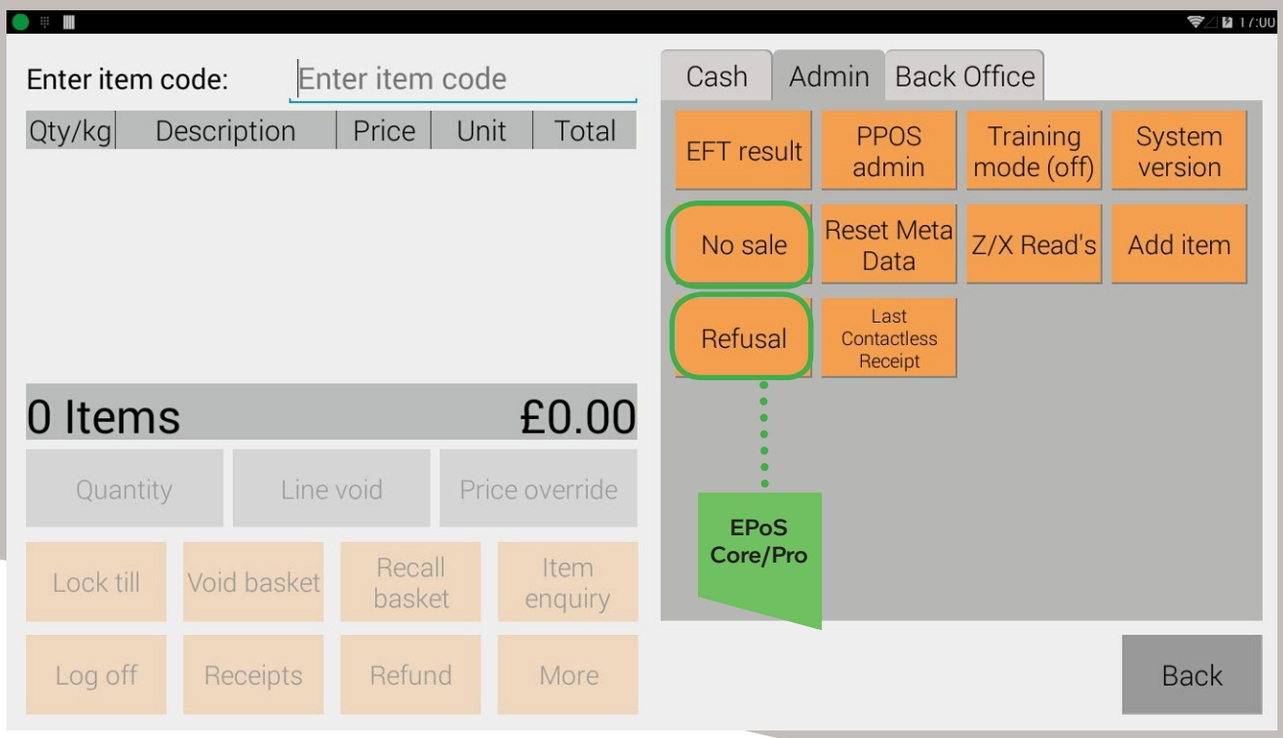
You can use this button to record if you need to **take cash out** of the drawer for any reason, such as for petty cash. This will appear on your X and Z Reports to help with your end of day reconciliation.

PaperRound Pay

Once you've subscribed to PaperRound, you can use this for news management and to allow customers to pay for their goods with their PaperRound account. This will appear on your X and Z Reports to help with your end of day reconciliation.

The More button

Admin menu



EFT result
This prints off the last credit or debit card transaction receipt – also available in duplicate receipts.

PPOS admin
Access PayPoint admin options.

Training mode
Use this button to turn training mode on and off in the Till app. Use this function to help train staff on the Till app without affecting your totals (excludes PayPoint training and card payments).

An on-screen notification lets you know you're in training mode.

System version
This shows you which version your device is running on.

No sale
This opens the cash drawer without recording a sale e.g. to change notes. This can be limited to certain users by changing permissions within User Management.

Reset Meta Data
This is very rarely used. **DO NOT use unless instructed to do so by PayPoint as it will interrupt your services.**

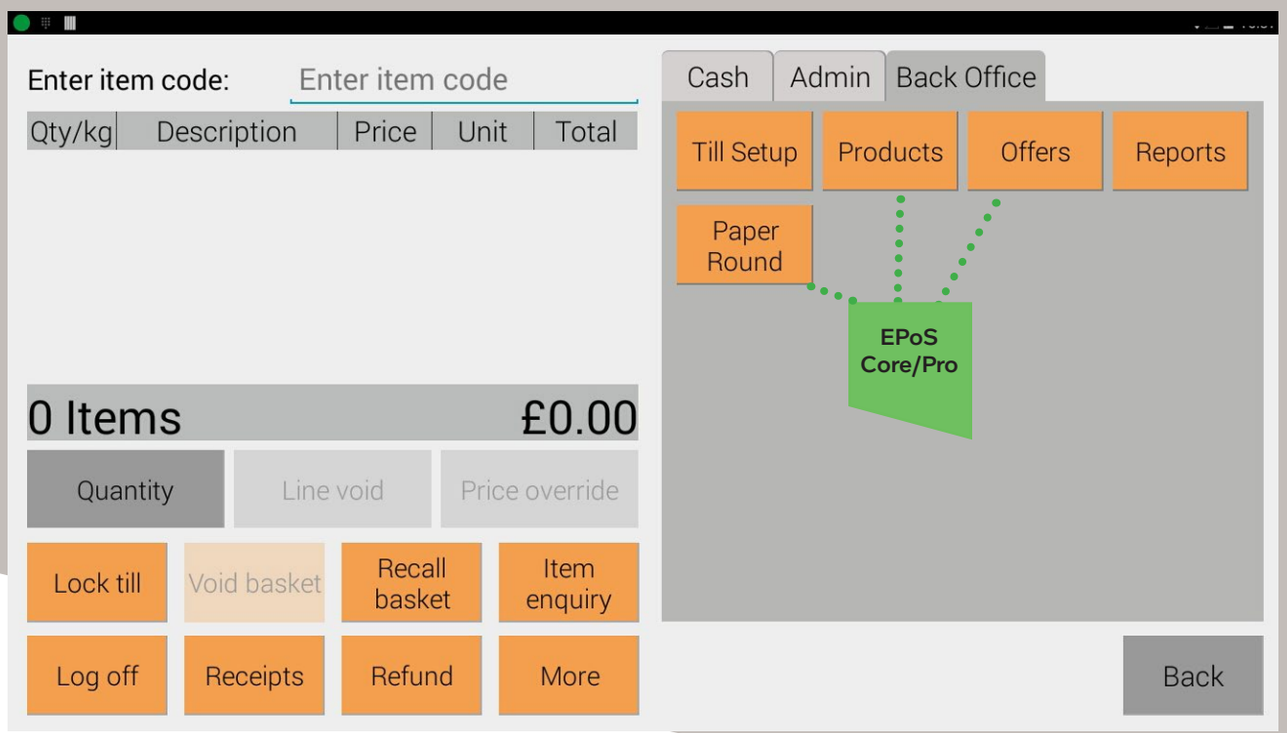
Z/X Reads
View and print your last 1,000 X and Z Reads.

Add item
Use this function to add a new product quickly.

Refusal
Use this function to refuse an item or basket to a customer with a reason.

The More button

Back Office menu



Till setup

Customise your till setup, including:

Settings

Personalise receipt messaging

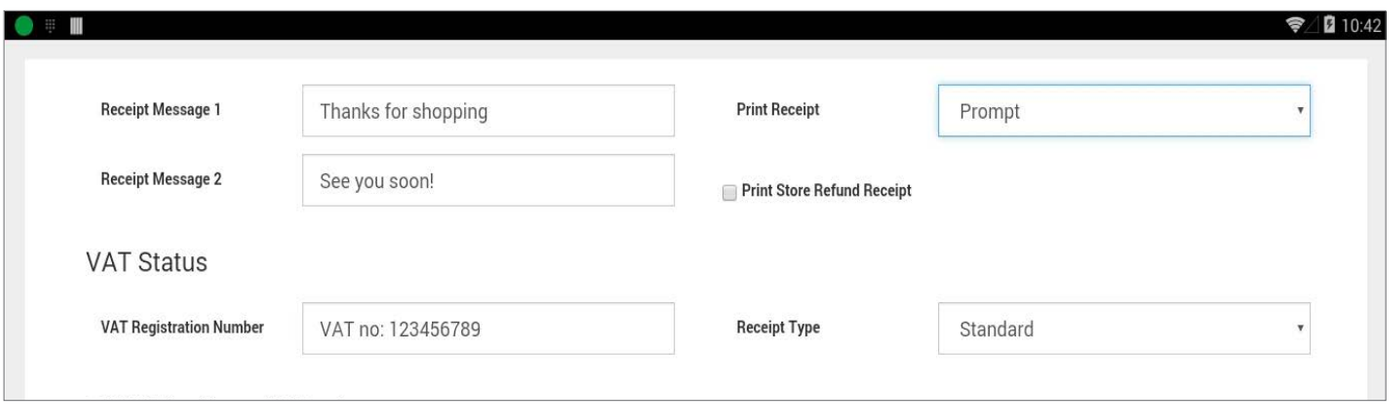
The store goods receipt has two lines for you to use for promotional messaging or seasonal messaging such as 'Thank you for shopping here' or 'Have a nice day!'.

Add VAT number to receipt

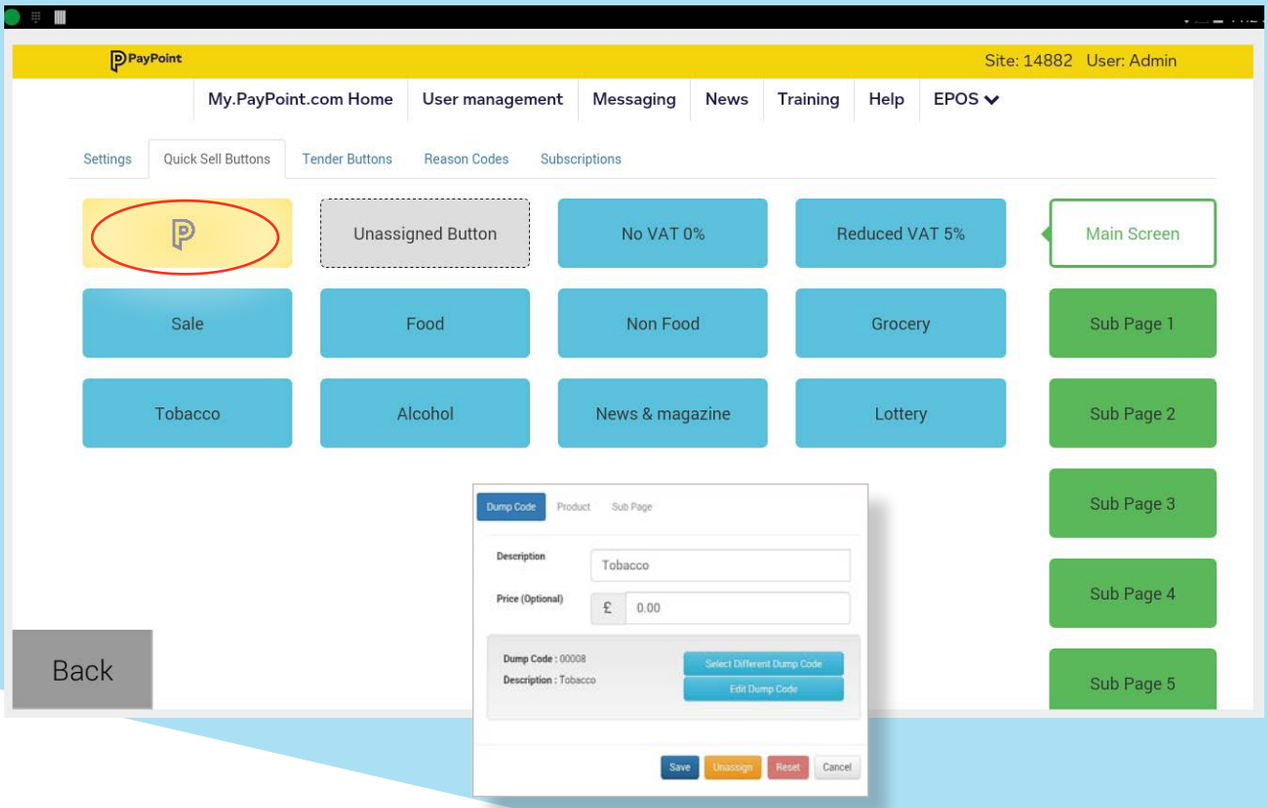
If you're VAT registered, you can add your VAT number which will appear at the top of the store goods receipt. **You must add the text 'VAT no' before the number i.e. VAT no. 1234567890.**

Change receipt print settings

There are three options: no, yes and prompt. The default setting is "No" meaning that the store goods receipt won't print. If this is set as no, but the customer wants a receipt, you can get this from the duplicate receipts. **PayPoint receipts will always print.**



Quick Sell Buttons



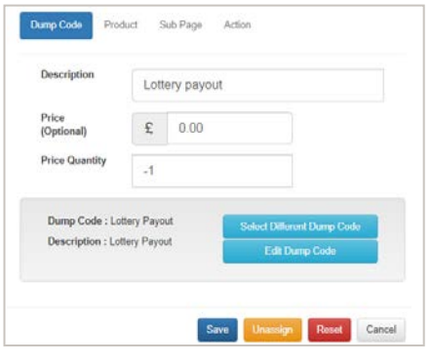
These buttons are used for items where there is no barcode or the barcodes change frequently. They can also be used for bestselling categories. **The PayPoint button can't be changed or moved.**

Select the button you'd like to edit. You can set up buttons as a:

1. **Dump Code** – this is just a category, so you can enter a different value each time this is used.
2. **Product** – this sets a description and price so you can quickly and easily enter common items.
3. **Subpage** – this button will link to another page where you can create a range of buttons (up to 19). For example, you could set a button for 'Fruit & Veg' which would link through to a page with buttons for each fruit or vegetable.

Set up Lottery Payout button

1. Till app > More > Back office tab > Till set up > Quick Sell Buttons tab
2. Select an unassigned button or unassign a button that is no longer needed
3. Select the **Dump Code** tab
4. Leave the price as zero (as there will be a different value every time)
5. Press the blue **Select Different Dump Code** button
6. Select **+ New Dump code** and enter the item code and description as **Lottery payout**
7. Select the category as **Lottery Payout** and press **ok**
8. Change the VAT code to **out of scope.** Press **save**
9. Change the price quantity to **-1**
10. Press **save**. The button will appear on the Till app in **red** instead of **blue**



When a customer wins on the Lottery, you need to use the new payout dump code which will appear as a negative value in the basket, meaning you need to hand the money to the customer.

This transaction will appear as a negative (as it's a pay OUT) on the receipt and X/Z reports.

Quick Sell Buttons

How to unassign Quick Sell Buttons

1. Select the button you want to change
2. Select **Unassign**
3. Select **Yes**
4. The button will disappear from the menu on the device

To assign a button to a Dump Code

1. Select an unassigned button
2. Select the **Dump Code** tab
3. Leave price as £0.00
4. Press **Select different dump code**
5. From the list select the category you want to assign to this button. You can scroll through the list or use the search function to find the right category
6. Press **Save**

To assign a button to a specific Product

1. Select an unassigned button
2. Select the **Product** tab
3. Press **Select different product**
4. From the list select the product you want to assign to this button. You can scroll through the list or use the search function to find the right product or you can add a new product.
5. Press **Save**

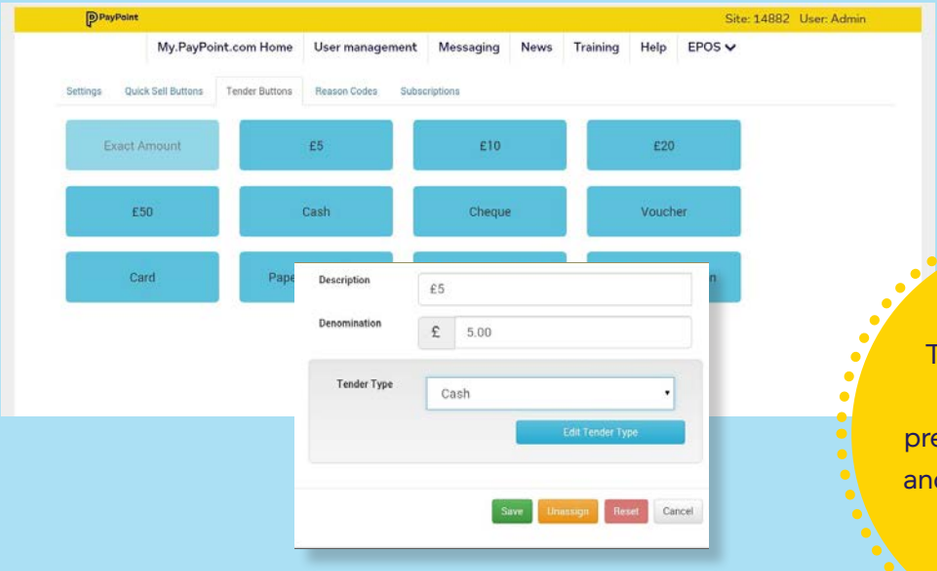
To assign a button to a Sub Page

1. Select an unassigned button
2. Select the **Sub Page** tab
3. Using the drop down menu, select the Sub Page you want to assign to this button
4. Press **Save**
5. Make sure you set up the buttons on the Sub Page you've assigned this button to
6. When there are buttons correctly set up on the Sub Page, the button on the Main Screen will show as green to indicate that it connects to a Sub Page

Training

Remember to use the Training app for help and support 24/7

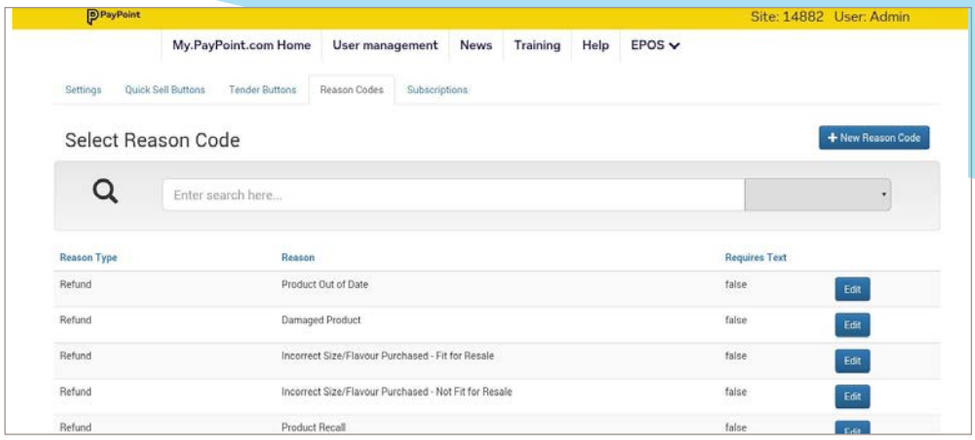
Tender buttons



The tender buttons can be edited by pressing on the button and changing the value and tender type.

Reason codes for refunds

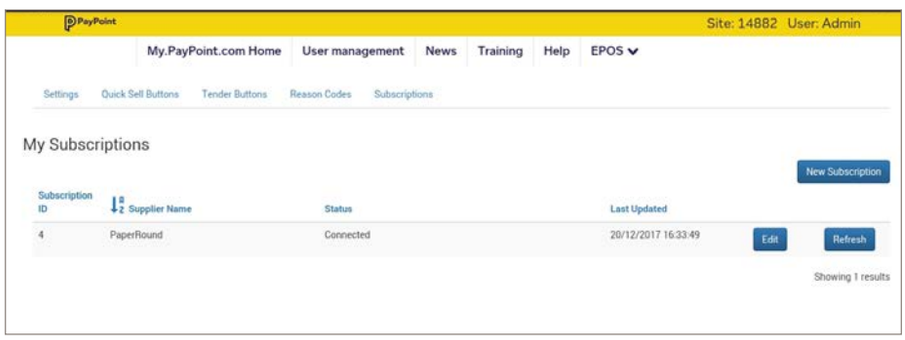
Add your own reasons for refunds or edit existing ones.



EPoS Pro

Subscriptions

Add a new subscription, such as PaperRound or symbol link with your existing user credentials.



EPoS Core/Pro

PaperRound news management

PaperRound is a news management system that will allow you to manage your newspaper and magazine stock from Smiths News or Menzies. There are two levels of service available: Counter News (free via PayPoint One) and Home News Delivery (chargeable via a website on a computer or tablet). Counter News is free for all PayPoint One retailers. Home News Delivery is available at an additional cost through PaperRound directly.

EPoS Core/Pro

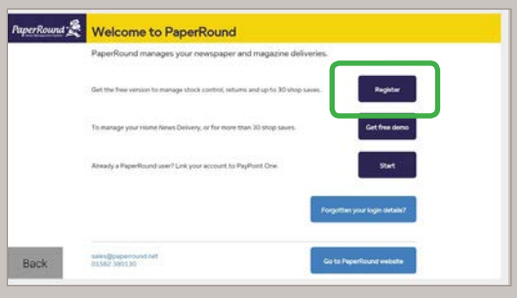
Benefits of free Counter News

- Manage up to 30 customer accounts, including adding holidays and voucher payments
- Automatic daily product and price file update overnight
- Automatic electronic delivery note receipts from Smiths News or Menzies
- Easily manage returns for newspapers and magazines
- Print debtors reports and statements to see outstanding balances owed by customers
- Counter News is free to PayPoint One retailers on a one-month rolling contract with PaperRound and no cancellation fees

How to register to PaperRound

LOCATION: Till App > More > Cash tab > PaperRound Pay

1. Press **Register**
2. Fill in all details and click the green tick
3. Your registration request is automatically sent to PaperRound.
4. You will receive a confirmation email from PaperRound to confirm your registration request has been received.
5. You will receive your login credentials within one working day. You will also receive your dedicated PaperRound training guide and QR codes to update your PayPoint scanner.

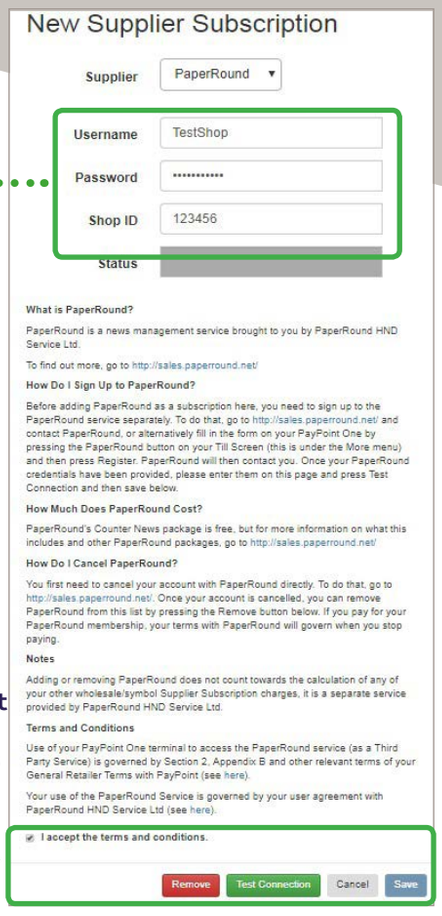


Once you have received your login credentials you can login and get started straight away. PaperRound will also send you a training guide so you know how to use the service.

How to log in to PaperRound

LOCATION: Till App > More > Cash tab > PaperRound Pay

1. Click **Start**
2. Takes you to the subscription section on my.paypoint.com
3. Fill in the credentials (sent to you from PaperRound)
4. Read and accept the terms and conditions
5. Press the green **Test Connection** button
6. Press **Save**



You must press Test Connection before the account details can be saved

IMPORTANT
You need a Smiths News or Menzies account to activate your PaperRound news

PaperRound will send you a training guide directly.

Reports

EPoS Core/Pro

EPoS Pro

These icons indicate features that are **only available if you have EPoS Core or EPoS Pro.**

Upgrade your package to gain access to this feature, plus many more business benefits.

Visit www.paypoint.one for more information.

Back Office reports

Reports are accessed via: **Till App > More > Back Office tab > Reports**

To print or export information into CSV format, access the reports from a PC, tablet or smartphone. **We recommend you do this every month to keep your records up to date.**

IMPORTANT

We recommend that you download your sales data every month for your records and VAT returns.

1. **Performance Summary Dashboard**
2. **My Reports** (EPoS Pro feature)
3. **Sales Report**
4. **Till Controls Report**
5. **Tender Report**
6. **PayPoint Sales**
7. **Promotions** (EPoS Core/Pro feature)
8. **Journal**
9. **Refunds**
10. **Receipt Viewer**

1 Performance Summary Dashboard

The dashboard shows a high level overview of your sales of store goods and PayPoint for today, this week and this month.

It includes:

- Sales comparison for the week, comparing current week vs last week, on a daily basis
- Your sales of store goods and PayPoint for today, this week and this month. Includes a performance indicator against the previous period.
- Sales Performance Indicators:

  1. PayPoint Top Sellers - Displays the top 5 grossing PayPoint items sold
  2. Goods Top Sellers - Displays the top 5 grossing Goods/ Products sold
  3. Mix and Match Offers - Displays the top 5 Promotions based on customer savings over the period.
  4. Till Controls - Displays the top 5 Till controls used over the period based on the number of events.

You can view these summaries for today, this week or this month and sort the information by price or quantity.

EPoS Pro

2 My Reports

You can filter any of the reports and then press the save button to look at them at a later time/date or export them into PDF/CSV format.

You can then group your sales by department (product category), VAT or Product.

You can also add another level of filtering by department, VAT rate, User, Item Code, Description or Barcode.

When viewing your sales data on screen, you can sort by any column in the report just by clicking on the column heading.

Clicking data allows you to drill down from department views to category then product through to transaction.

3 Sales Report

You can view your sales data for today, yesterday, the last 7 days, last 28 days or a custom date range of up to 31 days from your history.

You can then group your sales by department (product category), VAT or Product.

You can also add another level of filtering by department, VAT rate, User, Item Code, Description or Barcode.

When viewing your sales data on screen, you can sort by any column in the report just by clicking on the column heading.

Clicking data allows you to drill down from department views to category then product through to transaction.

4 Till Controls Report

This helps you report on events including price overrides, customer refusals, X and Z-Reads, refunds, cancelled or failed PayPoint transactions, adding floats, line voids, basket voids, and product updates.

You can use this to monitor staff behaviour and trends in your store.

You can view the data for today, yesterday, last 7 days, last 28 days or a custom range. You can then filter by event or user to see relevant till events and can sort the data by any column in the report.

5 Tender Report

You can view payment trends in your store using the Tender Report to analyse the number and value of transactions made by cash, card, voucher, refunds and any other tender types set up on your Till app.

You can view the data for today, yesterday, last 7 days, last 28 days or a custom range. You can then filter by tender type and can view a list of individual transactions or grouped by tender type. You can then sort the data by any column in the report.

6 PayPoint Sales

Report on your PayPoint transactions based on categories such as pre-pay (like electricity, gas and mobile top-ups), post-pay (usually bill payments) and parcels (if you have Collect+).

You can view the data for today, yesterday, last 7 days, last 28 days or a custom range. You can filter by scheme group and then by the type of transaction (such as a credit or reversal). You can also sort the data by any column in the report.

7 Promotions Report

Keep track of your promotions to see which are being used and which are working best.

You can view the data for today, yesterday, last 7 days, last 28 days or a custom range. You can filter by the type of promotion (such as Buy one get one free) or by the description. You can also sort the data by any column in the report.

EPoS Core/Pro

8 Journal - use this report for your VAT returns

The journal gives you access to sales, VAT and tender information one month at a time.

On the device you can view a summary and filter the information. If you're on a PC or laptop you can print the report or export a full transaction audit filtered by terminal for the specified period in CSV format so you can record it elsewhere or load it into your accounting software.

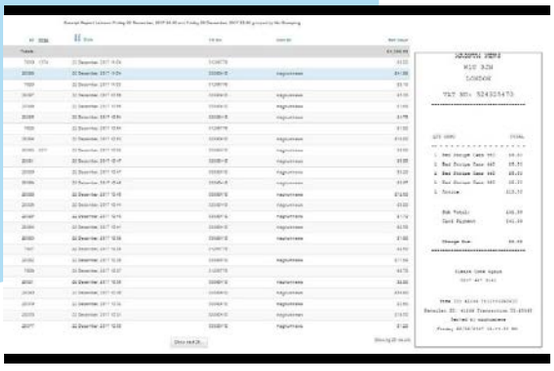
9 Refunds

You can keep track of the products that were refunded and the reasons why.

10 Receipt viewer

Like the duplicate receipts history on the Till app, you can now view your basket receipts from the back office for transactions in the time peroid selected.

The default view will be the current day and you can filter your dates as required. These can also be sorted by user ID and PP txn ID as well as individual terminals.



IMPORTANT

We recommend that you download your sales data every month for your records and VAT returns.

Run an X or Z Report

- An **X Report (Shift Report)** will print the totals for the device, but will not reset them. The figures will accumulate until a Z Report is printed.
- A **Z Report (End of Shift)** will show the totals and will reset the device's transactions to zero. You should run a Z Report for each device at the end of each working day. A Z Report run after midday will also trigger the device to upload the transactions to PayPoint and a Full Upload report will also be printed after the Z Report. If you have our PIN pad, an End of Day banking report will print and upload all transactions to the acquirer.

1 From the homescreen, open the Till app.

2 Select the orange **More** button.

More

3 Under the **cash** tab, select either the X or Z Report button. When you select X read, a dashboard will appear, giving you a snapshot of your till actions. You can print this report as many times as you want without resetting the totals.

4 For a Z read, this will print and reset your totals to zero, ready for the next day's trade.

View and print previous X and Z Reports

1 From the homescreen, open the Till app.

2 Select the orange **More** button on the Till screen.

More

3 Under the admin heading, select Z/X Read's

4 This shows the last 1,000 reports you've run, select the one you want to print

5 This will appear on the screen and you can print for your records.

You can restrict access to X and Z Reports by changing user permissions in the Manage Users app.

X and Z reports explained

Training

Remember to use the Training app for help and support 24/7

YOUR STORE
AB1 2CD
NORTHAMPTON
01234567891
GB987 6543 21

END OF SHIFT

First Txn 06/03/17 08:16:06 am
Last Txn 07/03/17 01:32:07 am

Sales

QTY	DESC	TOTAL
-2	Confectionery	£-6.50
5	Grocery	£13.80
1	Lottery&ScratchC	£2.00
4	Misc	£50.00
2	News & Magazines	£16.65
2	Off Licence	£7.98
1	Promo Discount	£-20.00
	Total	£63.93

Other Sales

QTY	DESC	TOTAL
2	Money In	£9.02
-1	Money Out	£-5.00
	Total	£4.02

Tenders

QTY	DESC	TOTAL
1	Voucher	£8.00
15	Cash	£73.90
2	Card Payment	£23.37
1	Change	£-5.00

Events

QTY	DESC	TOTAL
2	Txn Void	£21.50
1	Price Override	£-0.80
1	Promo Discount	£-20.00
1	Refund	£-1.50
6	Saved Bsk	£48.80
2	Recalled Bsk	£2.60

PayPoint

QTY	DESC	TOTAL
5	Payments	£42.30
1	Failed	£-10.00
	Net Payments	£32.30
	Net PayPoint	£32.30

Totals

Sales (ex PayPoint)	£86.23
Other (ex PayPoint)	£4.02
Refunds	£-1.50
Promo Discounts	£-20.00
Price Reductions	£-0.80
Net Sales	£63.93
Net Other Sales	£4.02
Net PayPoint	£32.30
Cash in Drawer	£68.90
Customer Count	16
Average Spend	£4.25

Thank you for shopping.
Have a nice day!

Store ID: 12345 Till: 12345678
Agent ID: 12345 Transaction ID: 201
Username: admin
Tuesday 07/03/17 01:32:07 am

This shows the transaction date and time period that the report will outline.

Items under SALES are store-bought products (i.e. non-PayPoint)

OTHER SALES see page 19

The report shows the total cash tendered plus the amount given in change. E.g. if the sale was for £2.80, the customer gave £5.00 and £2.20 was given in change, this would show as £5.00 in the 'Cash' section and £2.20 in the 'Change' section.

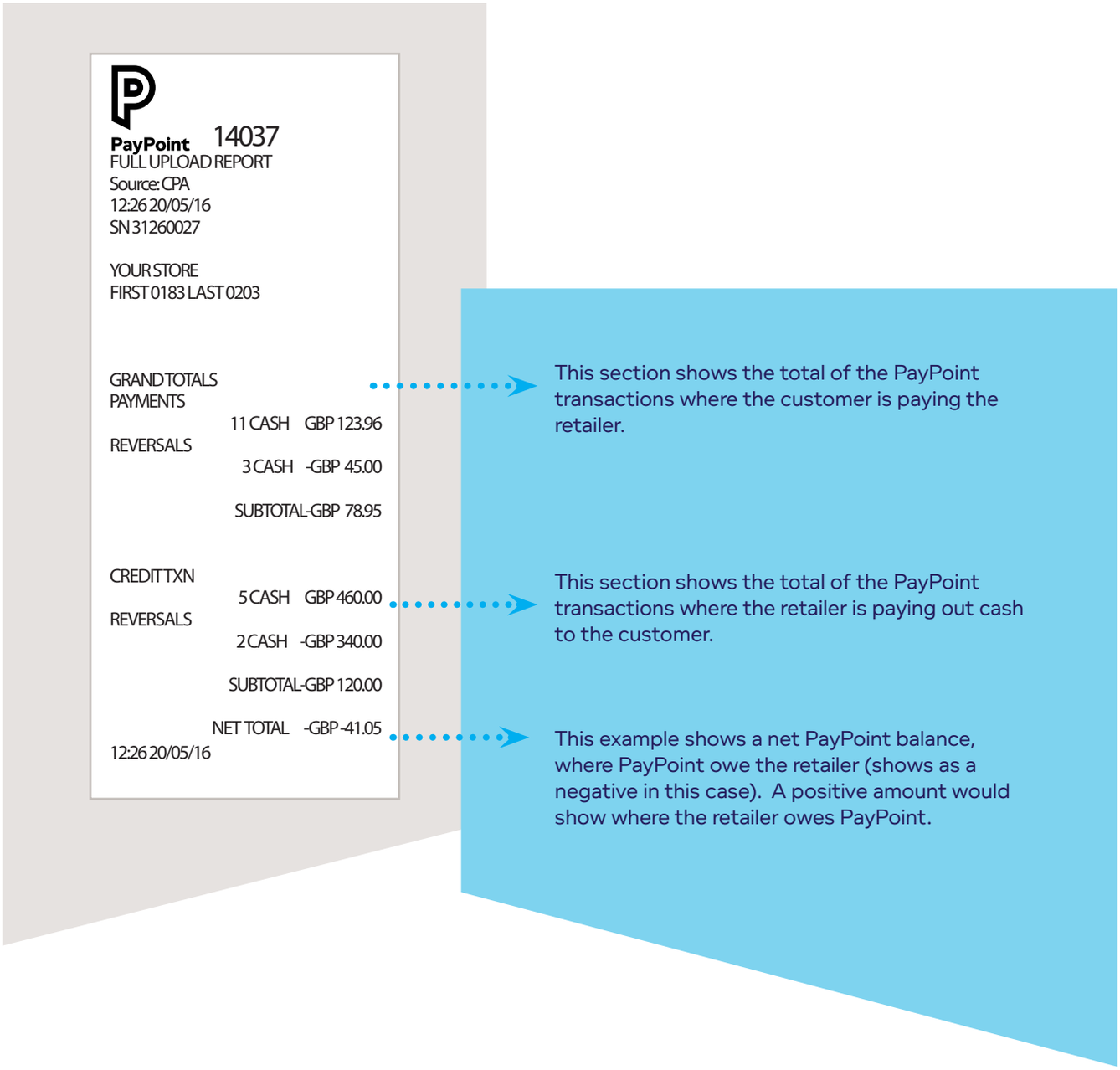
For Card Payments, this is the net total (payments less refunds) of card transactions - not including any cashback given.

EVENTS include line voids, basket voids, price overrides, till drawer open, cash in/out till drawer etc.

The report shows your PayPoint payments (such as successful bill payments, reversals and failed payments), PayPoint Credits (such as successful CashOut payment, reversals and failed credits) and the Net PayPoint figure (Net Payments less Net Credits).

Full Upload Report

- If the Z report is manually run after midday then the transactions are uploaded at this point and the Full Upload report is printed after the Z report.
- If there has not been a Z report run after midday, then the device will upload all transactions overnight and print this report automatically.



Settlement Notice – knowing what to bank

- You will get ONE Settlement Notice showing the total for all of the PayPoint transactions for all devices at your site.
- If the Z report is run after midday then the device will look for an available Settlement Notice and print it after the Full Upload report.
- If there has not been a Z report run after midday, then the device will look for an available Settlement Notice overnight and print this automatically on the device at your nominated site.

```
-----------------------------------------
SETTLEMENT NOTICE
DIRECT DEBIT
PAYPOINT COLLECTIONS LTD
0800 3100000
AGENT: 86905 27/04/16
-----------------------------------------
DEBIT (S)
PPOS
27/04/16 831.62
-----------------------------------------
PPOS MOBILE
27/04/16 40.00
-----------------------------------------
TOTAL DEBIT 871.62
=========================================
CREDIT (S)
PPOS
27/04/16 13.48
-----------------------------------------
TOTAL CREDIT 13.48
```

```
TOTAL DUE FROM ACCOUNT
20-29-90 ****4626
ON/JUST AFTER 29/04/16
DEBIT GBP 858.14
REF:0008690513012014
YOUR ADVANCE NOTICE
PERIOD IS 1 WORKING DAY
=========================================
```

IMPORTANT

If these aren't printing, please call the Contact Centre on freephone 0800 310 0000.

Your **Settlement Notice** tells you the value and date of your next Direct Debit so you know how much to bank

Credit and debit card reporting (if applicable)

1. Print X-Totals Report

An X-Total is for retailer use only. It can be run at any time throughout the day and is purely for your records, it will have no financial bearing on the device. An X-Total will print the totals, but not reset them.

1. Press MENU button on the PIN pad [SYSTEM MENU]
2. Press ENTER button on the PIN pad [TOTALS MENU]
3. Press F3 button on the PIN pad
4. Press ENTER button on the PIN pad
5. Swipe white credit and debit supervisor card on the PIN pad (wait until it has completed)
6. Press ENTER button on the PIN pad
7. Press ENTER button on the PIN pad
8. Receipt prints on the device

2. Print Z-Totals Report

A Z-Total will print the totals and reset the counter to zero.

1. Press MENU button on the PIN pad [SYSTEM MENU]
2. Press ENTER button on the PIN pad [TOTALS MENU]
3. Press F2 button on the PIN pad
4. Press ENTER button on the PIN pad
5. Swipe white credit and debit supervisor card on the PIN pad (wait until it has completed)
6. Press ENTER button on the PIN pad
7. Press ENTER button on the PIN pad
8. Receipt prints on the device

3. Print End of Day Banking Report

The End of Day Banking report forces the device to dial out and reconcile the totals with the acquirer.

This report is automatically triggered and will print if you run a Z Report after midday. This is important for your reconciliation and ensures the upload of any offline contactless card transactions. See the next page for the explanation of this report.

1. Press MENU button on the PIN pad [SYSTEM MENU]
2. Press ENTER button on the PIN pad [TOTALS MENU]
3. Press ENTER button on the PIN pad
4. Swipe white credit and debit supervisor card on the PIN pad (wait until it has completed)
5. Press ENTER button on the PIN pad
6. Press ENTER button on the PIN pad
7. Receipt prints on the device

Credit and debit End of Day Banking report
(if applicable)

```
BANKING TOTALS
PAYPOINT V12
1 THE BOULEVARD
SHIRE PARK
MRCH NO. 6652036
TERMINAL ID. 29644602
AUTH HOST
TOTALS AGREED
--------------------------------
PREVIOUS TOTALS
FOR RECEIPTS 0146-0151
          2                12.45DR
          2                 0.00CR
TOTAL     2                12.45DR
CONTACTLESS
          1                 7.45DR
                            0.00CR
MAESTRO
          2                12.45DR
                            0.00CR
TOTAL     2                12.45DR
CONTACTLESS
          1                 7.45DR
                            0.00CR
CURRENT TOTALS
FOR RECEIPTS -152-0160
          6               119.35DR
          2                30.00CR
TOTAL     2                89.35DR
          (CASH)           10.00DR
CONTACTLESS
          1                15.00DR
                           00.00CR
MASTERCARD
          1                 8.80DR
                            0.00CR
TOTAL     1                 8.80DR
MAESTRO
          4                49.00DR
          2                30.00CR
TOTAL     6                19.00DR
CONTACTLESS
          1                15.00DR
                            0.00CR
MASTERCARD DEBIT
          1                61.55DR
                            0.00CR
TOTAL     1                61.55DR
          (CASH)           10.00DR
14:24  16/05/16  40IF: 76
RECEIPT 0160
```

This shows if the transactions match up with the acquirer.

This is the net total of card transactions (value of sales less refunds), including cashback totals.

This is the total of cashback transactions.

Accessing the back office

Our cloud-based architecture means you can access your information from any internet-connected device, anywhere in the world.

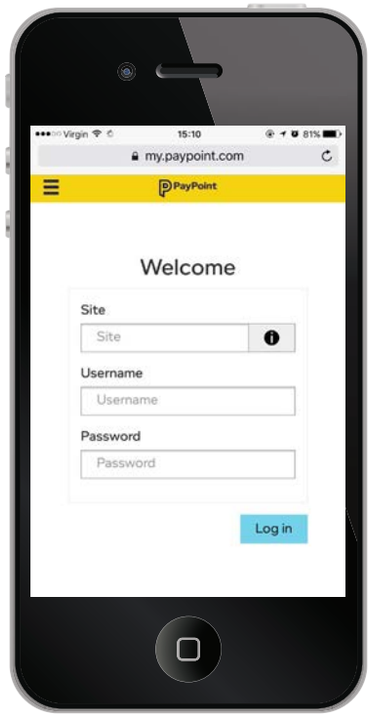
Go to my.paypoint.com

Use your **site number** along with your username and **password** (the same information you use to log into your PayPoint One terminal.)

Via the back office you can access User Management, News, Training, Help and Messaging.

You will also be able to easily set up products and promotions for your store.

All terminal users will be able to access the back office, providing this access is enabled for their account. The Admin will automatically have full access.



Trouble shooting and FAQs

Please refer to the Training app on your terminal for more information, including:

- Clearing a negative balance in a transaction basket
- Editing the blue buttons in the Till app
- Personalising your receipts
- More detailed information on Till app functionality
- Processing PayPoint transactions that exceed the scheme limit

Download the free PayPoint One app for your Android device.

Search for "PayPoint One" app in Google Play

GET IT ON Google Play

Top tips and reminders

Use the back office website (my.paypoint.com)

In the back office you can access Reports, User Management, News, Training, Help and Messaging. You can access this website quickly and easily from any PC or internet-enabled device.

All device users will be able to access the back office, providing this access is enabled for their account. Admin will automatically have full access. If your device needs to be swapped at any time, all your information is retained. This includes products, promotions, blue quick sell buttons, customised settings etc. so you don't need to re-input all that information.

Make use of the Training app

Help and support is available 24/7 on the training app. Access training videos, PayPoint transaction help and advice.

Remember to check card payments are successful

Always check the card payment is correct before comitting the sale. It is also very important to make sure the basket has cleared, indicating a successful sale so you don't lose money.

Printing Z Reports

Always run a Z Report at the end of each day to reset the device's transactions to zero and to complete the day's sales.

Always leave your PayPoint One powered on

Please leave your PayPoint One powered on overnight so that it can receive important updates and so your PayPoint transactions are successfully polled. This is important so customer payments reach the suppliers promptly and we can pay your commission.

Download your sales data regularly

We recommend you use your sales reporting tool and download your sales data regularly to keep your records up to date.

Please leave your PayPoint One powered on overnight to receive important updates.

Download the free PayPoint One app for your Android device from Google Play.

GET IT ON Google Play

Troubleshooting and FAQs

Please refer to the Training and Help apps on your PayPoint One device or via the web back office (my.paypoint.com) for more detailed instructions and help.

If you need more help please call us on freephone 0800 310 0000 or email PP1support@paypoint.com

Contact Centre opening hours

Monday – Friday: 08:00 – 20:00
Saturday: 08:00 – 18:00
Sunday: 10:00 – 16:00