



# PayPoint One

## Retailer Guide

Download the free PayPoint One Stock Manager app



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# Welcome to PayPoint

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

- Cloud-based retailer hub [my.paypoint.com](https://my.paypoint.com) for access to your store anywhere and from any pc/laptop.
- Searchable training, videos and updates through the online retailer hub [my.paypoint.com](https://my.paypoint.com).
- Retail Services Hub and technical support, available 365 days a year.
- Commission credited to your bank account weekly and free, online access to commission statements via the retailer hub [my.paypoint.com](https://my.paypoint.com).
- Sales reports and business insights through the online retailer hub [my.paypoint.com](https://my.paypoint.com).
- 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 E-Money, money transfer and pre-paid card loads, which should always be paid for in cash. **PayPoint transactions must be free to customers.**



### Take advantage of the PayPoint Loyalty Programme

As a PayPoint retailer, take advantage of the recently launched PayPoint Loyalty Programme and unlock these great deals to help save you money and increase footfall in store.



### Use our free-of-charge POS

Promote your in-store services to customers with our free point of sale. Request additional point of sale here: [paypoint.com/pos](https://paypoint.com/pos). Further signage is available at an additional cost.



### 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. **Functionality will depend on your PayPoint One package.**



### Train your staff

Access training videos and support directly through your PayPoint One Training app.



### Use social media

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 online at [paypoint.com/brandassets](https://paypoint.com/brandassets).



### Free ACS membership

Benefit from free entry to industry leading events, representation on key issues affecting your business and access to Assured Advice guides for leading best practise. Register for free at [paypoint.com/acs](https://paypoint.com/acs).

# Getting Started with PayPoint One

Use this guide to help run your store with PayPoint One. Look out for the icons below to identify some key things you need to know. You can find training videos on: [my.paypoint.com](https://my.paypoint.com)

**Top tip**  
Information that will help you get the most out of using PayPoint One in your store.

**Important**  
Information that you need to know about PayPoint One.

These icons indicate features that are **only available if you have EPoS Core or EPoS Pro**. Upgrade your package to gain access to these features, plus many more business benefits. Visit [paypoint.one](https://paypoint.one) for more information.

EPoS Core/Pro

EPoS Pro

## Get connected

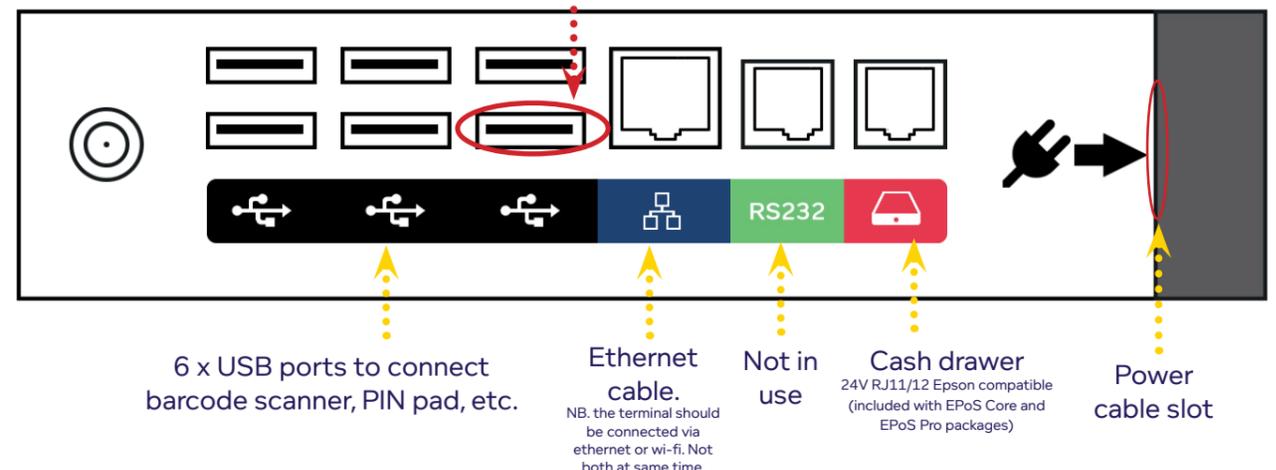


- 1 Full colour 11.6" touchscreen (can be tilted for optimal viewing)
- 2 Magnetic swipe card reader
- 3 On/off power switch – also used for reboots.
- 4 Gas card reader
- 5 Contactless reader for transport smart cards (region specific)
- 6 Electricity key reader
- 7 5" customer facing colour screen
- 8 Till roll holder and printer
- 9 Contactless credit and debit PIN pad – integrated card payments

**Important**  
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.



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# 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

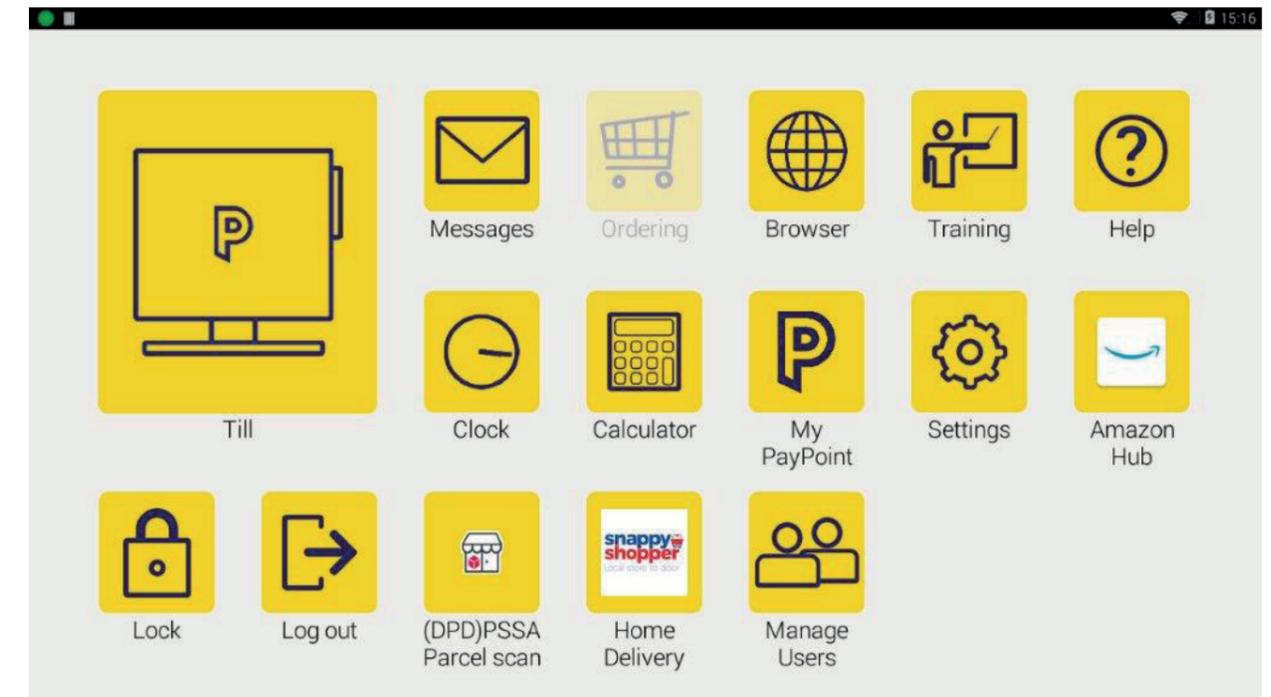
## Important - Till rolls will NOT be sent automatically

You will need to order till rolls when you run low on stock.

Till roll dimensions: 57mm x 75mm.

Ordering till rolls: 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 **0330 400 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.

# The homescreen



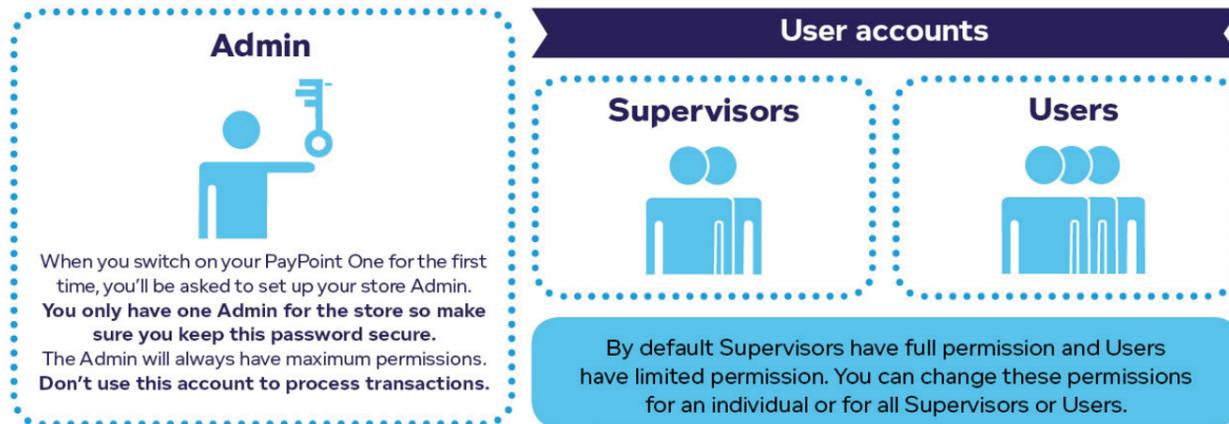
The PayPoint One homescreen has a range of helpful apps. Users will only be able to see the apps or features of the apps that they have permission to access (this can be changed in the **Manage Users** app):

- Till:** This is where all transactions are processed, including PayPoint and EPOS transactions
- 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 (my.paypoint.com):** Our web-based retailer hub where you can manage your store.
- Settings:** Adjust the device's brightness, volume, Wi-Fi and lock settings to suit your needs
- Snappy Shopper:** Manage all your home delivery orders (only applicable once registered with Snappy Shopper)
- DHL:** Access the DHL parcel service (only applicable to stores with DHL service)
- Amazon Hub:** Access the Amazon Hub parcel service (only applicable to Amazon Hub stores)
- 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
- Log out:** This will log out the existing user so a different user can log in. You should log out at the end of each day
- Manage users:** As well as setting up additional users

# 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



## Quickly and easily set up new Supervisors or Users:

- 1 Go to the **Manage Users** app or tab on [my.paypoint.com](http://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.

**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.

**Password tips**

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

**Important**

⚠ Ensure your PayPoint One user permissions are correctly set up for you and your staff so your business information remains secure.

# PayPoint One Stock Manager app and back office/PC

Accessing the back office and the stock manager app: our cloud-based system means you can access your information from any internet-connected device, anywhere in the world.

Go to [my.paypoint.com](http://my.paypoint.com) to log into the back office. You can download the free PayPoint One Stock Manager app through the App Store or Google Play.

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

Through the back office you can access user management, news, training, help and messaging. App functionality depends on your PayPoint One package.

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

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

To download, search "PayPoint One" in the App Store or Google Play

Download on the App Store | GET IT ON Google Play

Weekly sales (£)

Day	Sales (£)
MON	57
TUE	284
WED	383
THU	100
FRI	135
SAT	0
SUN	0

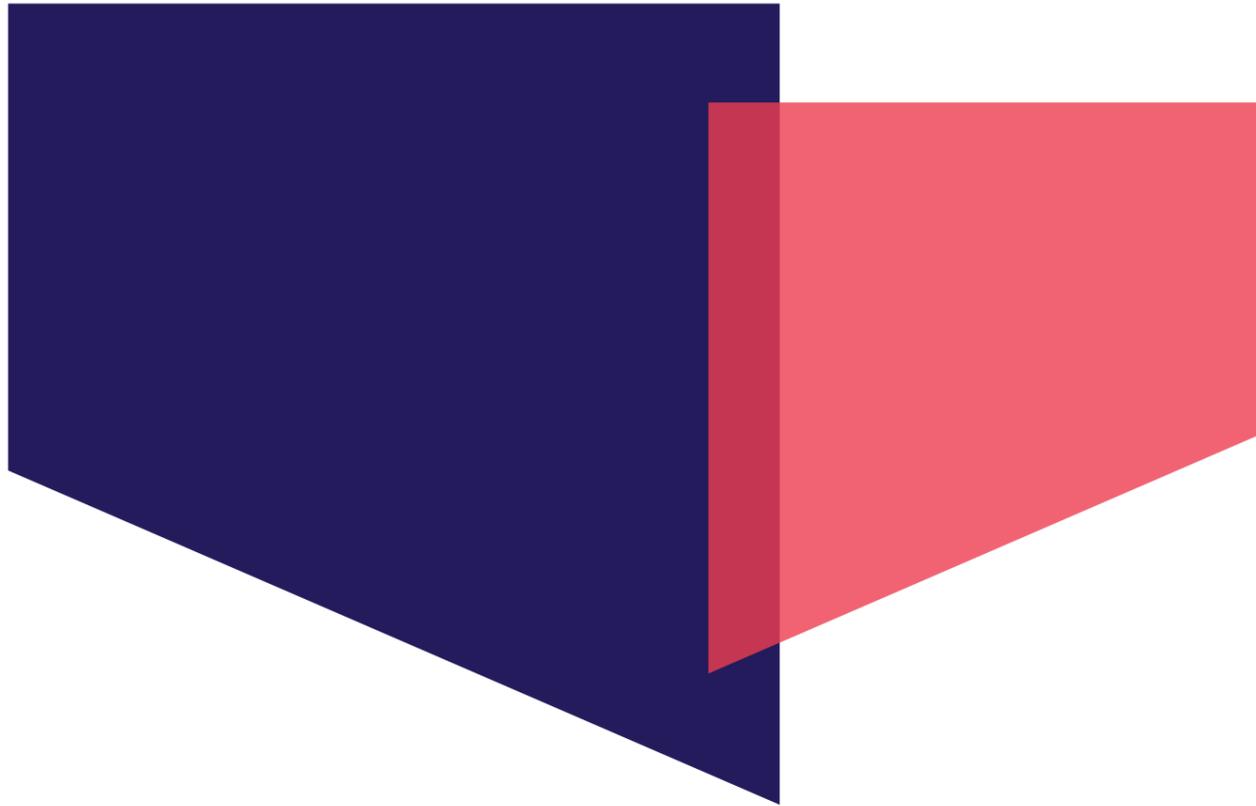
Last update: Just Now

## What can you use the stock manager app for?

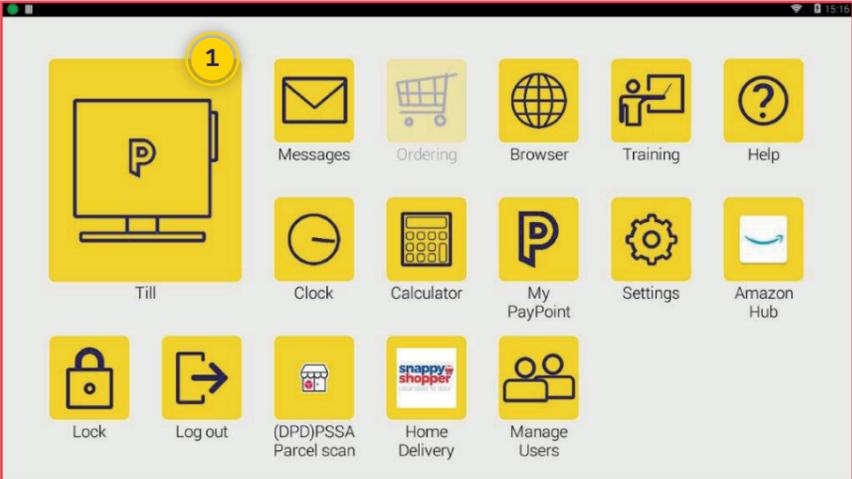
**PayPoint One Base:** see real-time goods and PayPoint sales data and sales tender breakdown.

**PayPoint One EPoS Core:** real-time goods and PayPoint sales data and sales tender breakdown. Plus, product maintenance, tag maintenance and sales totals.

**PayPoint One EPoS Pro:** real-time goods and PayPoint sales data and sales tender breakdown. Product maintenance, tag maintenance and sales totals. Send shelf edge labels to print from the terminal, stock management, orders and deliveries.



# Introduction to the Till app



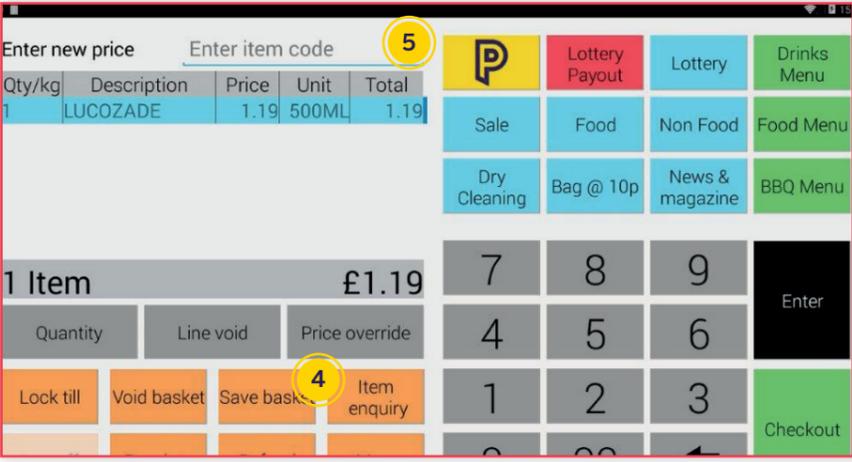
**1**  
The Till app (top left) is where you process all your transactions for PayPoint and store purchases

# Using the Till app



**2**  
Set up non barcoded products like hot drinks, food and other services such as dry cleaning

**3**  
Use the admin menus (orange buttons) for till setup, reprinting last transaction receipts and more



**4**  
Item enquiry button, this is where you print single Shelf Edge Label or change the price of a product, already in your system

**5**  
Press the yellow 'P' button to process all PayPoint transactions

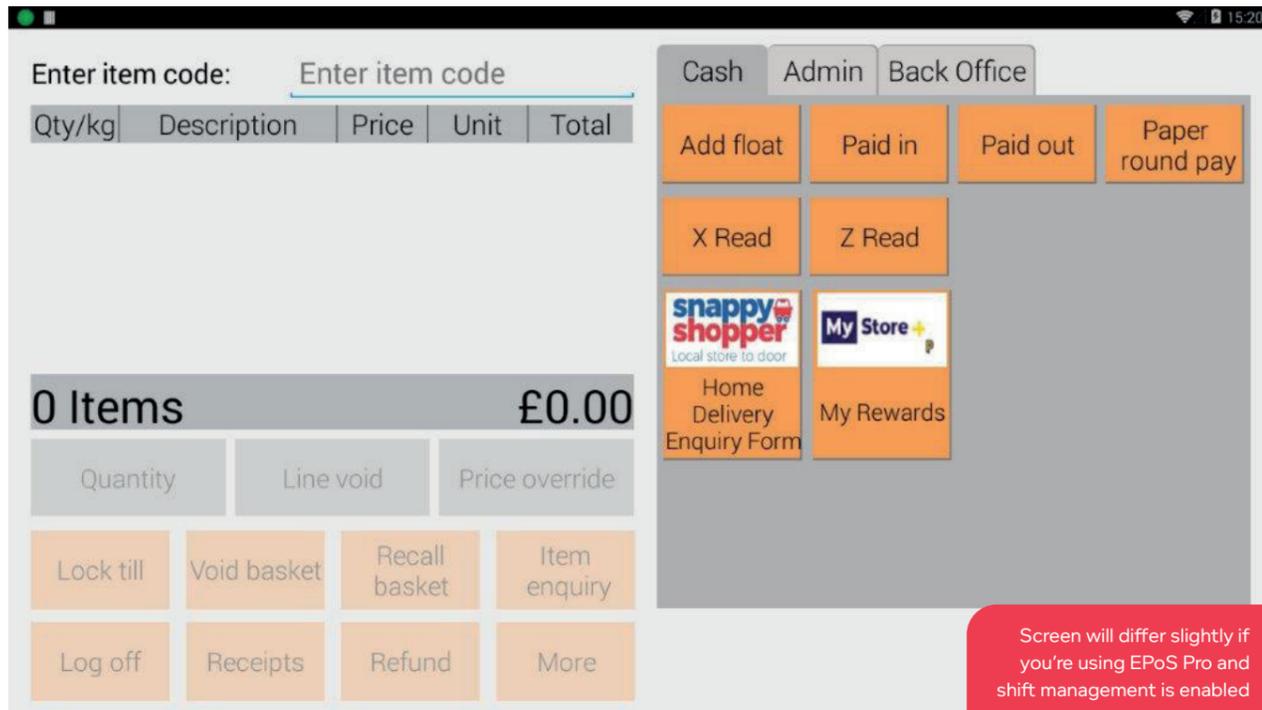
These icons indicate features that are **only available if you have EPoS Core or EPoS Pro. Upgrade your package** to gain access to these features, plus many more business benefits. Visit [paypoint.one](http://paypoint.one) for more information.



# The more button

## Cash menu

EPoS Core/Pro



### 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.

### 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. You can select reasons such as 'deposit' or 'other' using free text fields.

### 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. You can select reasons such as cash lift, supplier delivery, wages or other.

### PaperRound Pay

Once you've subscribed to PaperRound, you can use this for news management & 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.

### X and Z reports

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.

**Z report** (End of Shift report) 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.

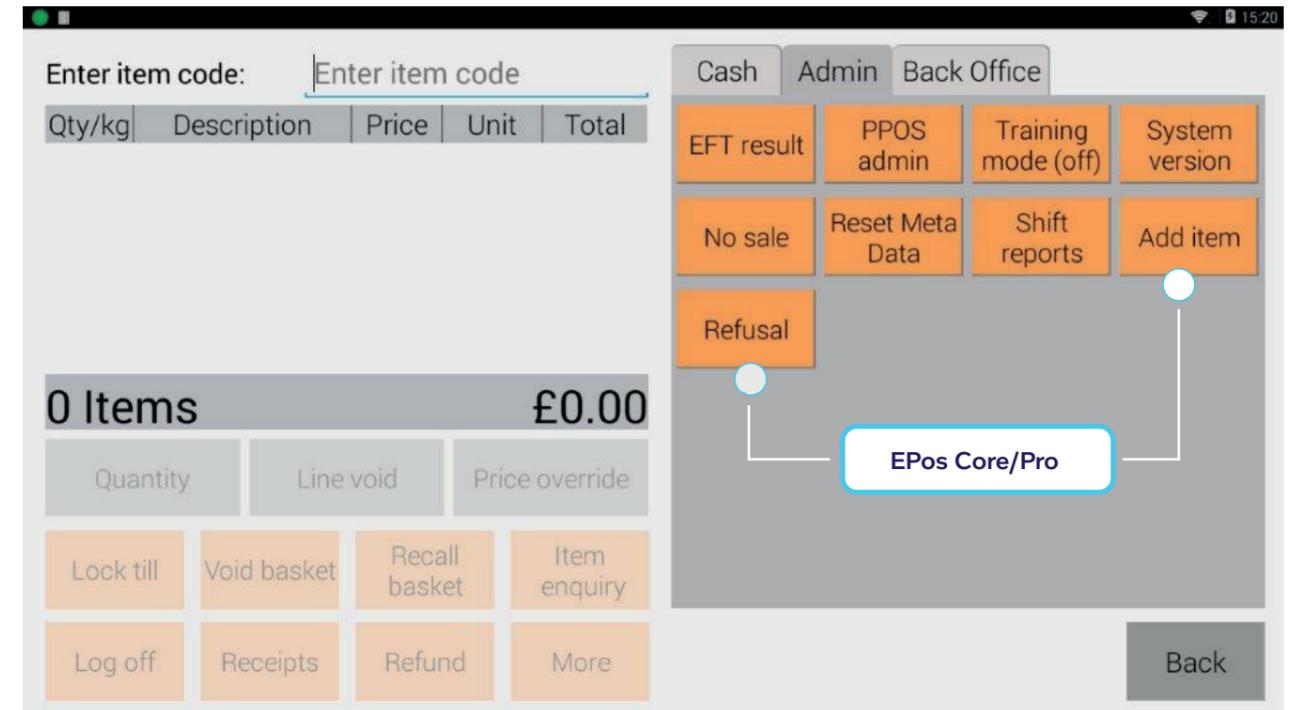


### Important

You must run a Z report at the end of the day. X reports are for the end of each shift. If you are using EPoS Pro, your X report is called the Shift report and your Z report is called the End of Shift report.

# 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.**

### X/Z reads

View and print your last 1,000 X and Z Reads. If you are using EPoS Pro, your X report is called the Shift report and your Z report is called the End of Shift report.

### Add item

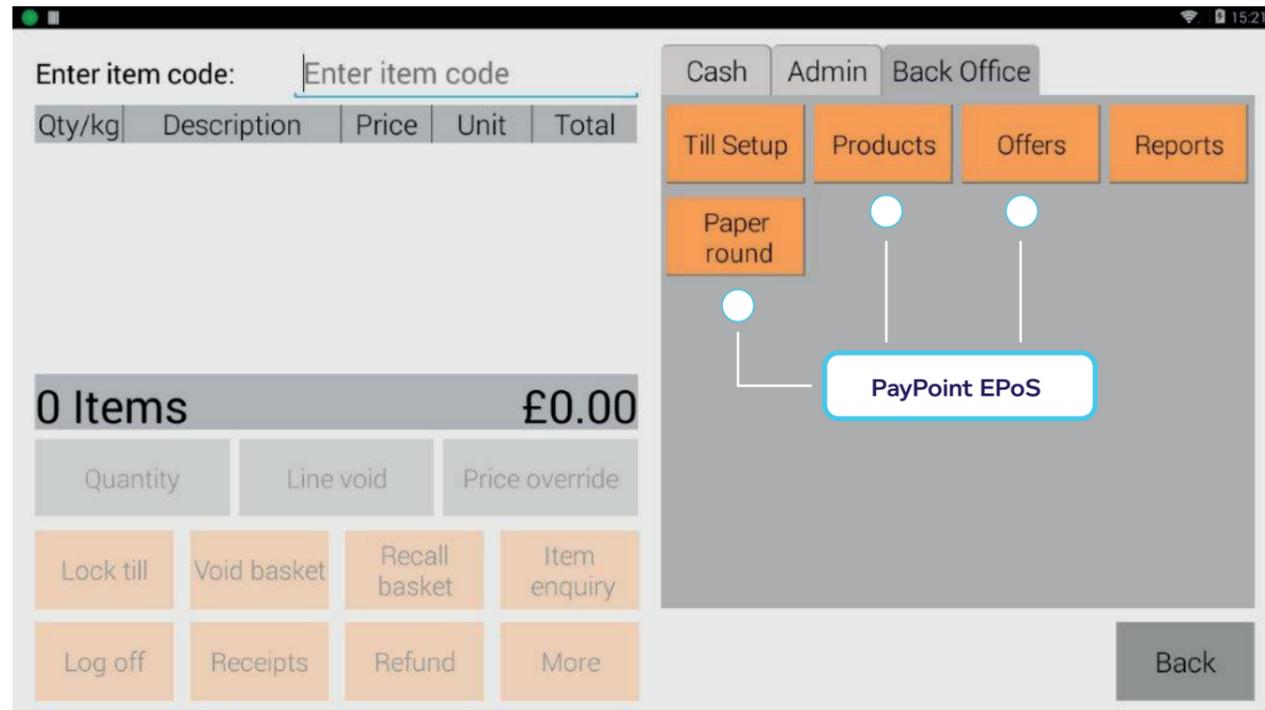
Use this function to add a new product quickly.

### 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.

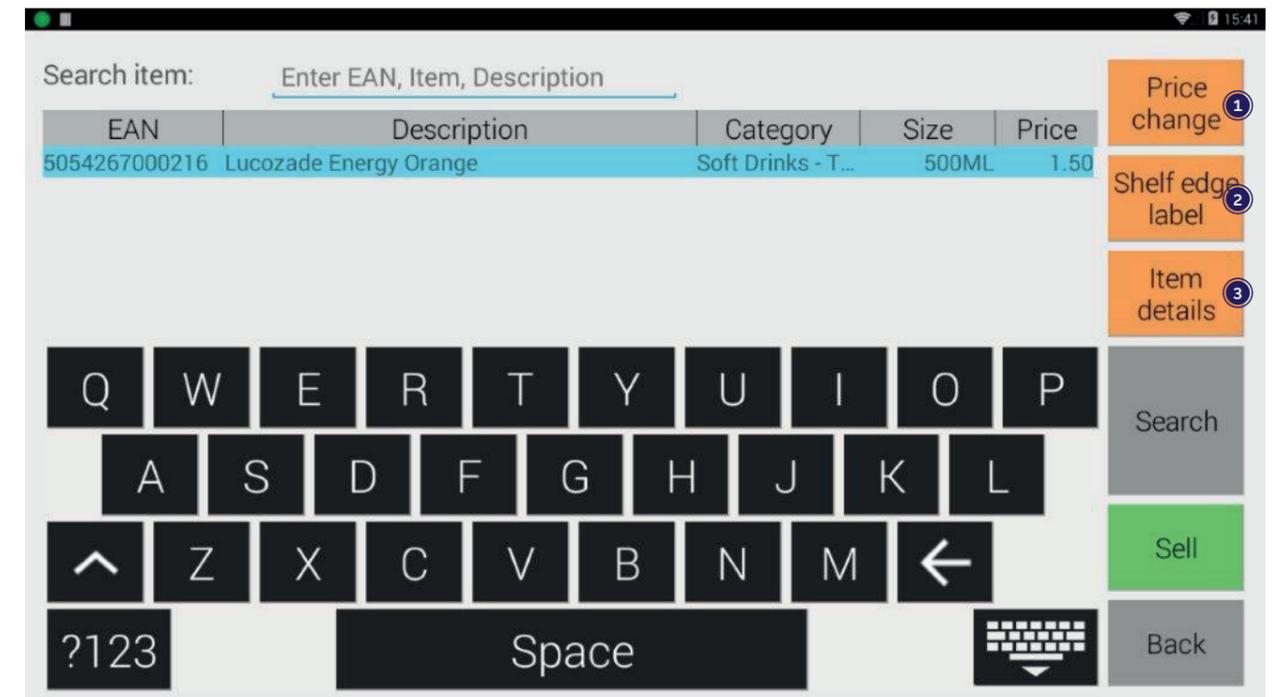
**PayPoint receipts will always print.**

Receipt Message 1	<input type="text" value="Thanks for shopping"/>	Print Receipt	<input type="text" value="No"/>
Receipt Message 2	<input type="text" value="See you soon!"/>	<input type="checkbox"/> Print Store Refund Receipt	
VAT Status		Receipt Type	<input type="text" value="Standard"/>
VAT Registration Number	<input type="text" value="VAT no: 123456789"/>		

# Item enquiry

EPOS Core/Pro

- 1 Go to 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 paypoint.com where the item can be reviewed and edited
- 4 Select **Sell** to add it into the basket



### 5 Press Back to return to the home screen of the Till app

# Using the Till app for PayPoint transactions

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EPoS Core/Pro

EPoS Pro

## Types of PayPoint transactions per basket



- Electricity key (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



- Gas cards (1 per basket)**  
Insert the gas 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



- Swipe cards**  
Cards with a magnetic 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. Then choose Magcard



- 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



- 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. Then choose Barcode



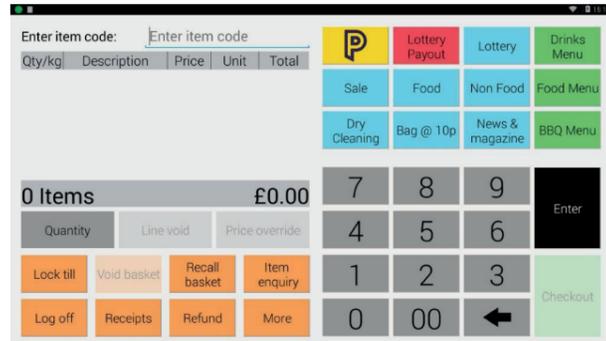
- Touchscreen menu (yellow 'P' PayPoint button)**  
Use the menu to sell digital vouchers, mobile top-ups, parking payments, The Health Lottery and many other schemes



### Top tip

You can process multiple PayPoint transactions in one basket meaning you can process an electricity key and a gas card at the same time. Follow the on-screen prompts and leave the media in the readers until checkout is completed.

# 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

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

## Adding PayPoint transactions to a basket

Electricity keys, gas cards and 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.

**Top tip**  
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

**Top tip**  
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)

# Reversing a PayPoint transaction

**Out of sequence reversals**  
The following rules apply when reversing a PayPoint transaction on PayPoint One:

- You will need the customer receipt to get the **AUTH CODE** (PayPoint do not 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. Key or card needs to be left in until transactions is checked out
- 8 This is not required if the transaction was processed using the touchscreen 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

**Important**  
Not all PayPoint transactions are reversible. If in doubt, try it out.

# PayPoint transactions

You can access all PayPoint services through the Till app. Press the PayPoint button to begin.

You can add multiple shop items and PayPoint transactions into one basket, including having an electricity key and a gas card in the device at the same time. **It is important to leave the energy key/card in the terminal until checkout is completed.**

## Bill payment transactions

**Please use these instructions when processing barcoded bills, key charge, swipe cards or Quantum gas cards.**

- 1 Take the customer's payment and confirm how much they want to pay.
- 2 Swipe card, insert key/card or scan barcode
- 3 Select the transaction amount. If not displayed on the touch screen, type in the amount using the terminal keypad and press **Enter**
- 4 Select payment method required. The option to pay by debit card will only appear if allowed by the payment scheme
- 5 Check all the transaction details and confirm or cancel the transaction by pressing the appropriate button on the screen. The transaction will be added to the basket for checkout
- 6 Hand the customer their receipt. Some transactions, for example transport tickets, require receipt wallets to seal the receipt in before handing to the customer. Please use these where supplied

## Mobile top-up transactions

- 1 Take the customer's payment and confirm how much they want to pay
- 2 Select **Mobile & international top up**
- 3 Select **Mobile top up**
- 4 Select the required mobile top up network. Press the **More A-Z** button. If the mobile network offers additional top-up packages, you will need to select the type of voucher before selecting the amount
- 5 Select top up amount or select **Other amounts**
- 6 Check the top up amount and network with the customer before pressing **Confirm**. The transaction will be added to the basket for checkout



### Top tip

If the customer requests a top-up or something you are not familiar with, try it out. PayPoint One is always being updated so follow the instructions on screen to process the transaction, it will only accept valid transactions. Never process a PayPoint transaction over the phone.

# PayPoint transactions

## Cash Out transactions

**Cash Out vouchers can be on paper, via text message or email and the amount will differ, it could also be for cash or energy credit. Before processing always read the instructions on the voucher and only ask for ID if the voucher requires it.**

### If the customer is receiving cash

- 1 Before scanning the barcode, check you have enough cash in the till to pay the amount that is owed to the customer. If the voucher asks you to check ID then check that the ID matches the customer details on the voucher
- 2 Scan the voucher barcode. If the barcode does not scan or the customer has a text message code, select **E-Money, digital & Cash Out**, followed by **Cash Out** and then **i-movo payout**
- 3 Type in the barcode number and press **Enter**
- 4 The amount to pay out will be displayed on screen. The transaction will be added to the basket for checkout
- 5 Take the cash from your till and hand it to the customer. A receipt will print for your records

### If the customer is receiving an energy credit for their meter

You need to process TWO separate transactions for these Cash Out vouchers.

#### Transaction one – scan the barcode

- 1 Scan the barcode, if the voucher is valid the screen will display the value. If the barcode does not scan, select **E-Money, digital & Cash Out**, followed by **Cash Out** and then **i-movo payout**. Type in the barcode number and press **Enter**
- 2 Check the credit value and select Confirm. Keep the redemption receipt for your records

#### Transaction two – top up the energy key or card

- 1 Insert the customers' energy key or card into the device
- 2 Enter the value stated on the voucher and press **Enter**. The transaction will be added to the basket for checkout
- 3 When the energy key or card has been topped-up, give it back to the customer with their PayPoint receipt
- 4 The customer can now take their energy key or card home to use in their meter



### Top tip

Customers may have their voucher code on a piece of paper, text message or email – all are acceptable. Always follow the voucher or on-screen instructions.



### Important

Never process a transaction over the phone. The customer must always be present in the store. Follow the PayPoint screens at all times.

# PayPoint transactions

## TV Licence transactions

Before starting a TV Licence transaction, please ask the customer if they have a renewal notice. If they do, you must use this to take their payment. If they do not, you must fill in their details as below. Some customers pay for their TV Licence on their cash or debit card but they can also use their TV Licence payment or savings card.

- 1 Take the customer's cash payment and select **TV Licence, Western Union & more**
- 2 Ask the customer if they have a renewal notice. If they do, select **TV Licence Renewal** and follow the instructions on the screen. If they do not, select **First Time TV Licence**
- 3 Select the customer's title. More options can be found when selecting **More**
- 4 Select the customer's first name initial and press **Enter** on the screen
- 5 Use the touch screen to spell the customer's surname, double-check the spelling with the customer before pressing **Enter**
- 6 If the customer is happy to give their phone number, use the screen to enter this in. If not, press **Enter** to continue
- 7 Type in the customer's postcode and press **Enter**
- 8 Enter the customer's house number or name, you can use the arrows to scroll through available addresses. Press Enter. If the address cannot be found, do not complete the transaction. The customer must call TV Licencing directly for further advice
- 9 Check the details you have entered with the customer, if any details are wrong, press the Back button to re-enter
- 10 Press **Confirm** to confirm the details. The transaction will be added to the basket for checkout



### Important

These transactions are **NOT REVERSIBLE** so ensure the details are correct.

## Banking deposit transactions

e.g. Monzo and Tide

- 1 Take the customer's payment and confirm how much they want to pay
- 2 Swipe card
- 3 Type in the amount using the touchscreen and press **Enter**
- 4 Check all the transaction details and confirm or cancel the transaction by pressing the appropriate button on the screen
- 5 Hand the customer their receipt

# PayPoint transactions

## Digital Voucher transactions

Digital vouchers are for customer's purchasing online but want to pay in-store. Big brands such as Amazon, PlayStation, Xbox, Nintendo and Spotify are available.

- 1 Take the customer's payment and confirm how much they want to pay
- 2 Select **E-Money, Digital & Cash Out**
- 3 Select **Digital and Gaming Vouchers** (or Music Vouchers)
- 4 Select brand
- 5 Choose the customer's required eVoucher value
- 6 Check and press Confirm. The transaction will be added to the basket for checkout. These transactions are not reversible
- 7 Check the transaction has been successful and hand the receipt to the customer. Their voucher code is on the receipt



### Important

Digital vouchers are the equivalent of cash and transactions should **never** be carried out over the phone. The customer must always be present in-store.

## E-Money transactions

- 1 Take the customer's payment and select **E-Money, Digital & Cash Out**
- 2 Select **E-Money & Cash Vouchers**
- 3 You will be asked to confirm that the customer is in store. If they are not, you need to cancel the transaction and call us immediately on freephone **0330 400 0000\*** to report the suspicious activity
- 4 Select the payment scheme. For some schemes you will see an additional screen where you have to select either **Under 18** or **Over 18** to confirm your customer's age before continuing
- 5 Select the amount on screen or type in an amount requested and press **Enter**
- 6 Press **Confirm** to complete the transaction. The transaction will be added to the basket for checkout. Check the transaction has been successful and a receipt will print with the customer's voucher code



### Important

eMoney is the equivalent of cash and transactions should **never** be accepted over the phone. The customer must always be present in-store.

# PayPoint transactions

## Energy transactions

### Issuing energy media

If a customer needs a replacement energy key, they will have been given an RTI or Tag number from their supplier. **Please make sure you give them the correct key/card for their supplier so they can use energy in their homes.** It is also important so we can send you the right stock when you are running low and to pay your commission correctly.

### Issuing energy keys

- 1 Press the PayPoint button and type in the 8-digit RTI number, press **Enter**
- 2 Select **3=Key Issue**
- 3 Take the right branded/coloured key from your stock and insert it into the key slot
- 4 The transaction will be added to the basket for checkout. **Wait for the message** 'please remove token' before removing the key. The customer can now top up their new key with credit immediately

### Issuing gas cards – no RTI number

- 1 If there is no RTI number provided, press the PayPoint button and select **Issuing Gas & Electricity**
- 2 Choose the gas card supplier from the menu and **Confirm**
- 3 Sometimes suppliers may charge for a new gas card, if the screen displays this, make sure you take payment from the customer. The transaction will be added to the basket for checkout

### Issuing gas cards – with an RTI number

- 1 If the customer has a RTI number, select **Quantum RTI** from the **Issuing Gas & Electricity** from the menu
- 2 Select the correct supplier and enter the **7-digit RTI number**
- 3 Select **Confirm**. The transaction will be added to the basket for checkout

## Issuing a £0 value transaction

**Some gas suppliers send Emergency Command messages to customers. These are invisible messages to update their meter. If a customer wants to do this, follow the steps below:**

- 1 Insert the customer's gas card
- 2 Enter the top-up value of £0 and press **Enter**
- 3 Check the transaction details press **Confirm** and once complete return the gas card to the customer

### Important

Please make sure you give customers the right key or card for their supplier so they can use energy in their homes.

Your energy key/card stock updates automatically so it is also important to issue the correct media so we can send you the right replacements when stock is low. Not all replacement keys/cards are chargeable – check the screens for information.

If you need more stock of keys or cards, please email [contactus@paypoint.com](mailto:contactus@paypoint.com).

# PayPoint transactions

## Transport transactions

**You will only see the transport tickets available to sell in your area. Follow the on-screen instructions which will guide you through the process.**

- 1 If the customer has a smart card, place it onto the smart card reader. The smart card must remain on the smart reader at all times during the transaction
- 2 Take the customer's payment and select **Transport & Parking**
- 3 Tickets receipts must be sealed in wallets if the screen asks you to do so. Receipts not sealed in receipt wallets will not be accepted for travel. Press **Confirm**
- 4 Select the transport company or select **More** to view those not displayed on the first screen
- 5 Select ticket area or destination. Select **Additional Areas** to view more areas or destinations that are not displayed on the screen
- 6 Select ticket type. Additional screens may appear containing further ticket options
- 7 Press **Confirm** and the transaction will be added to the basket for checkout



### Top tip

For some transport tickets, you may need to enter additional information such as travel dates and photocard ID numbers. Receipts not sealed in receipt wallets will not be accepted for travel.

## Parking

**In some PayByPhone and RingGo areas, motorists can pay for their parking with cash at a local store with PayPoint.**

- 1 Select **Transport & Parking**
- 2 Select **Parking**
- 3 Select **PayByPhone or RingGo**
- 4 Enter the location code which the customer will provide
- 5 Enter the customer's car registration number and press **Enter**
- 6 Type in the number of minutes that the customer wants to park e.g. for 1.5 hours = type in 90 minutes
- 7 Confirm the details with the customer i.e. their registration number, location code and number of minutes they wish to park and the amount they need to pay
- 8 Take the payment and press **Confirm**
- 9 A receipt will print for the customer to keep. They do not need to display this receipt in their car

# PayPoint transactions

## Health Lottery transactions

Retailers will need to be registered with The Health Lottery before this functionality can be accessed.

### Play with an activated Playcard

- 1 Simply swipe the customer's Playcard. If it has not been previously activated, you will be prompted to enter the player's numbers and press confirm to print their ticket. This will also activate the Playcard for future use
- 2 Select the required draw days – Tue/Wed/Thu/Fri/Sat or all five
- 3 Select the number of weeks
- 4 Check the details, take the customer's payment and select confirm to print the ticket. Always take the customer's payment before confirming the sale
- 5 Hand the ticket to the customer

### Play using a £1 Quickpick Playcard – a single line for next draw

- 1 Scan the barcode on the reverse of the £1 Quickpick Playcard
- 2 Take the customer's payment
- 3 Select **Confirm** to print 1 line for the next draw
- 4 Hand the ticket to the player

### Play without £1 Quickpick Playcard – more than one line and/or more than one draw

- 1 Select £1 game Tue/Wed/Thu/Fri/Sat or all five
- 2 Select Quickpick play or one of the Quickpick hot keys to skip the next steps. If you used one of the hot keys, the ticket will automatically be produced for the next available draw
- 3 If you selected Quickpick, choose the required draw days Tue/Wed/Thu/Fri or all five
- 4 Select the number of weeks
- 5 Select the number of lines (up to 40)
- 6 Check the details and take the customer's payment
- 7 Press confirm to print the ticket



#### Important

Customers should contact the Health Lottery directly on **0844 375 55 55** if they have any questions about their ticket.

# PayPoint transactions

## Health Lottery transactions

### Paying prizes

- 1 Scan the barcode or select manually key pay out from the Health Lottery menu
- 2 Select the game and enter the 15-digit barcode
- 3 Ensure you have enough cash to pay the customer
- 4 If the ticket is a winner, a receipt will be printed; this should be given to the customer. If the prize is over the payout limit a receipt will be printed advising the customer to contact The Health Lottery



#### Top tip

The original winning ticket should always be returned to the customer. If the prize is over the payout limit a receipt will be printed advising the customer to contact The Health Lottery.

### Winning numbers

- 1 You can print the winning numbers from the previous two draws in the £1 game
- 2 Select Health Lottery
- 3 Select the game you want to print winning numbers for
- 4 Select past winning numbers, confirm the game and then select confirm

The winning numbers for the last 2 draws in that game will be printed. The Society Lottery which is open for the next draw of that game will also be printed

- 5 You must be able to provide this information for customers



#### Which prizes can I pay out?

You can pay out up to £50 and 9 free tickets on a single winning ticket; whether that is one cash prize or more than one cash prize equalling £50 or less. Prize money is paid back into your bank account on the first Tuesday two weeks after a pay-out transaction.

Please ensure the original ticket is returned to the customer as they may have an entry into the monthly raffle draw. The customer should contact the Health Lottery directly if they have any questions about their ticket.



#### Important

The original ticket should always be returned to the customer after a payout. If the prize is above the payout limit, a receipt will be printed asking the customer to contact The Health Lottery directly on **0844 375 55 55**.

# Using the Till app to sell products

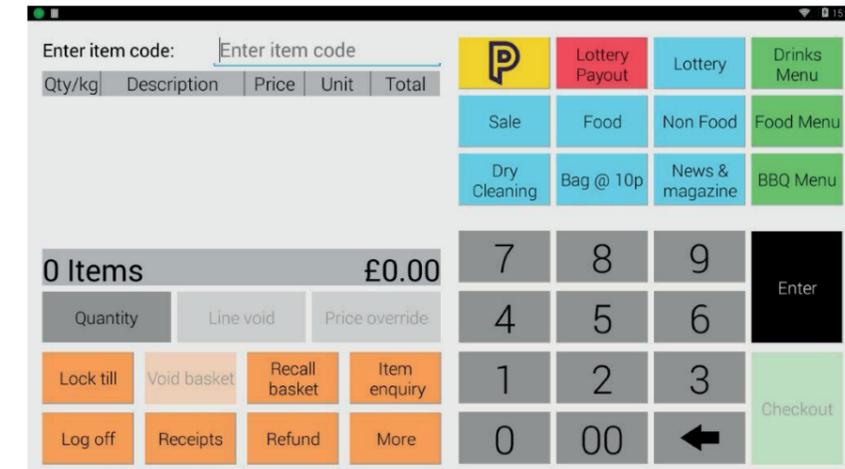
These icons indicate features that are **only available if you have EPoS Core or EPoS Pro**. Upgrade your package to gain access to these features, plus many more business benefits. Visit [paypoint.one](https://www.paypoint.one) for more information.

EPoS Core/Pro

EPoS Pro

# Processing transactions in the Till app

EPoS Core/Pro



The screenshot shows the Till app interface. At the top, there is a search bar labeled 'Enter item code:'. Below it is a table with columns for 'Qty/kg', 'Description', 'Price', 'Unit', and 'Total'. The table currently shows '0 Items' and a total of '£0.00'. To the right of the table is a grid of product categories: Lottery Payout, Lottery, Drinks Menu, Sale, Food, Non Food, Food Menu, Dry Cleaning, Bag @ 10p, News & magazine, BBQ Menu. Below the categories is a numeric keypad with buttons for 0-9, a back arrow, and an 'Enter' button. At the bottom, there are several function buttons: Lock till, Void basket, Recall basket, Item enquiry, Log off, Receipts, Refund, More, and a 'Checkout' button.

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

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

## Adding products to the basket - price marked products already added

### 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.

### 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

## 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:
  - 1 Quick tender the exact amount in cash
  - 2 Select a pre-set tender amount (cash)
  - 3 Tender by cash, cheque, voucher or card (or with a combination of payment types)

# PayPoint EPOS 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 at current rates.

## 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 Pay by integrated card

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. For a cash and card transaction, complete the cash transaction first and complete payment with the card transaction

**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**

PayPoint One will **always** print PayPoint transaction receipts, regardless of payment type. Basket receipts will print depending on your till settings



A maximum of £50 cashback is available to customers paying by chip and PIN. If you would like this removed, please call us on 0330 400 0000\*.



### Important

Make sure the basket is clear indicating a successful sale. Always check the card payment amount is correct before committing the sale.



### Top tip

Change your receipt printing settings (always, prompted or never print) in EPOS Till Setup in the back office.

# Refunding a store transaction

1 From the home screen, 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. 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

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



### Top tip

EPOS Pro users – you can add a reason code for refunds. Find it under EPOS Till Setup – Reason codes.

## View and print duplicate receipts

1 In the Till app. Select the orange **Receipts** button

2 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

3 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



### Top tip

Your refunds will be viewable in the Till Control Report

Recent Receipts				PAYPOINT AL7 1EL WELWYN GARDEN CITY VAT# 123 4567 89	
ID	PP ID	Date	Receipts	Net Value	
340		16/07/21 15:02:49	1	6.59	
339		16/07/21 15:02:41	1	6.59	
338		16/07/21 15:02:31	1	1.19	
337		16/07/21 15:02:21	1	2.50	
336		16/07/21 15:02:04	1	25.00	
335		16/07/21 15:01:48	1	2.00	
334		16/07/21 15:01:34	1	1.00	
333		16/07/21 09:24:31	1	43.20	
332		16/07/21 09:24:06	1	25.00	
331		16/07/21 09:23:50	1	1.00	
330		16/07/21 09:03:28	1	43.20	
329		16/07/21 09:03:01	1	2.00	
328		16/07/21 09:02:39	1	0.78	
327		16/07/21 09:02:27	1	2.50	
...		...	...	...	

QTY	DESC	TOTAL
S 1	FELIX CHECK POU	£0.39
S 1	FELIX CHECK POU	£0.39
S 1	FELIX CHECK POU	£0.39
***	3 for 2 ***	£-0.39
Total Savings:		£-0.39
Sub Total:		£0.78
Cash		£0.78
Change Due:		£0.00

# Discounts, refusals and saved baskets

## Price override

- 1 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**
- 4 **You can only mark a price down and not up**  
The basket will update with the new adjusted price

## Refusal 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 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



### Top tip

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



### Top tip

Refusals are viewable in the Till Control Report

# Reports and Banking

These icons indicate features that are **only available if you have EPoS Core or EPoS Pro. Upgrade your package** to gain access to these features, plus many more business benefits. Visit [paypoint.one](https://paypoint.one) for more information.

EPoS Core/Pro

EPoS Pro

# PayPoint banking guide

It is very important that money taken from PayPoint transactions is in your nominated bank account with plenty of time for us to collect the funds. If there are insufficient funds, charges will be applied. If you have any problems please let us know immediately.

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 **at least** one working day before the Direct Debit is due. Please note that banking days will be subject to change during Bank Holidays and you will be advised accordingly.

You can check your daily Direct Debit amount by logging into [my.paypoint.com](https://my.paypoint.com) and viewing the 'My Statements' tab.

PayPoint transaction day	Recommended day to bank PayPoint takings	Latest day to bank PayPoint takings	Direct Debit day (Banking after this time may result in a failed direct debit)
Monday	Tuesday	Wednesday	Thursday
Tuesday	Wednesday	Thursday	Friday
Wednesday	Thursday	Friday	Monday
Thursday	Friday	Monday	Tuesday
Friday – Sunday	Monday	Tuesday	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. Settlement Notices are available under the 'My Statements' menu in the back office.

### Z report (End of Day report)

You must print a Z report (End of Day 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.

#### Top tips

- Use your Settlement Notice, which shows the value and date of your next Direct Debit
- 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
- Consider using a dedicated bank account for your PayPoint Direct Debits

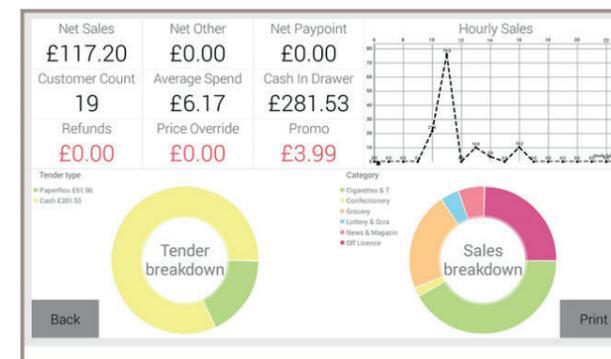
#### Important

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

# Run an X or Z report

- An X report (Shift report if you're using EPoS Pro) 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 Day if you're using EPoS Pro) 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

- From the homescreen, open the Till app
- Select the orange **More** button
- Under the cash tab, select either the X or Z report button. When you select X read (Shift report), 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



- For a Z read (End of Shift), this will print and reset your totals to zero, ready for the next day's/shift trade

## View and print previous X and Z reports

- From the home screen, open the Till app
- Select the orange **More** button on the Till screen
- Under the admin heading, select X/Z reads or shift reports
- This shows the last 1,000 reports you've run, select the one you want to print
- 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.



#### Important

Only print a Z report at the end of the day. To get totals throughout the day without resetting them, run your X report. Remember, if you're using EPoS Pro the X report is called Shift report and Z report is called End of Shift report.

# X and Z reports explained

YOUR STORE  
AB1 2CD  
NORTHAMPTON  
01234567891  
GB987 6543 21

**END OF SHIFT**

1 First Txn DD/MM/YY 08:16:06 am  
Last Txn DD/MM/YY 22:32:07 pm

**2 Top-Level Department Sales**

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

**3 Other Top-Level Department Sales**

QTY	DESC	TOTAL
2	Lottery	£9.02
-1	Lottery Pay out	£-5.00
	Net Total	£4.02

**4 Tenders**

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

**5 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

**6 PayPoint**

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

**7 Summary**

Sales (ex PayPoint)  
£86.23  
Other (ex PayPoint)  
£4.02  
Refunds  
£-1.50  
Promo Discounts  
£-20.00  
Price Reductions  
£-0.80

- 1 This shows the transaction date and time period that the report will outline
  - 2 Items under TOP-LEVEL DEPARTMENT SALES are store-bought products (i.e. non-PayPoint)
  - 3 OTHER TOP-LEVEL DEPARTMENT SALES e.g. Lottery
  - 4 TENDERS 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
  - 5 For Card Payments, this is the net total (payments less refunds) of card transactions - not including any cashback given
  - 6 EVENTS include line voids, basket voids, price overrides, till drawer open, cash in/out till drawer etc
  - 7 PAYPOINT shows 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)
- PayPoint - includes failed transactions, for a full view of transactions please refer to your Full Upload report
- 7 SUMMARY: Cash in Drawer - add together 'Cash', 'Float' and 'Paid In', then subtract 'Change', 'Paid Out' and 'Cashback'
- Average Spend - add together 'Net Sales', 'Net Other Sales' and 'PayPoint', then divide by 'Customer Count'

**Important**

Only print a Z report at the end of the day. To get totals throughout the day without resetting them, run your X report.

# 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.

**P**

**PayPoint 14037**  
FULL UPLOAD REPORT  
Source: CPA  
12:26 DD/MM/YY  
SN 31260027

YOUR STORE  
FIRST 0183 LAST 0203

**1 GRAND TOTALS**

**PAYMENTS**

11 CASH GBP 123.96

**REVERSALS**

3 CASH -GBP 45.00

**SUBTOTAL-GBP 78.95**

**CREDIT TXN**

5 CASH GBP 42.00

**REVERSALS**

2 CASH -GBP 340.00

**SUBTOTAL-GBP 120.00**

**NET TOTAL -GBP 41.05**

12:26 DD/MM/YY **3**

- 1 This section shows the total of the PayPoint transactions where the customer is paying the retailer
- 2 This section shows the total of the PayPoint transactions where the retailer is paying out cash to the customer
- 3 This example shows a net PayPoint balance, where PayPoint owes the retailer (shows as a negative in this case). A positive amount would show where the retailer owes PayPoint

# Settlement Notice – knowing what to bank

SETTLEMENT NOTICE  
DIRECT DEBIT  
PAYPOINT COLLECTIONS LTD  
0800 3100000  
AGENT: 86905 DD/MM/YY

DEBIT (S)  
TERMINAL  
DD/MM/YY 1074.00

PPOS  
DD/MM/YY 1298.70

PPOS MOBILE  
DD/MM/YY 190.00

PAYPOINT BILLING  
CHG/PNUK/01006/000006  
DD/MM/YY 168.00  
CHG/PPUK/01006/000028  
DD/MM/YY 60.00  
TOTAL 228.00

TOTAL DEBIT 871.62

CREDIT (S)  
ATM  
DD/MM/YY 700.00

TOTAL CREDIT 700.00

TOTAL DUE FROM ACCOUNT  
20-29-90 \*\*\*\*4626  
ON/JUST AFTER DD/MM/YY  
DEBIT GBP 2090.70  
REF:0008690513012014  
YOUR ADVANCE NOTICE  
PERIOD IS 1 WORKING DAY

- ③ You will get ONE Settlement Notice showing the total for all of the PayPoint transactions for all devices at your site
- ③ 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
- ③ 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

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

 **Important**  
If these aren't printing, please call the Retail Services Hub on **0330 400 0000\***

# 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 card 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

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 DD/MM/YY 40IF: 76	
RECEIPT 0160	

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

- 1 MRCH NO. This is your merchant number for your account with Lloyds Cardnet
- 2 This shows if the transactions match up with the acquirer
- 3 This section shows the previous days transaction totals so that discrepancies are easily balanced
- 4 This is the net total of card transactions (value of sales less refunds), including cashback totals
- 5 This is the total of cashback transactions

# Back Office reports

LOCATION: Till app > More > Back Office tab > Reports

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

These reports become more informative the more you use your PayPoint One EPoS Core and Pro features.

- |                                 |                                   |
|---------------------------------|-----------------------------------|
| 1 Performance Summary Dashboard | 7 Promotions <b>EPoS Core/Pro</b> |
| 2 My reports <b>EPoS Pro</b>    | 8 Journal                         |
| 3 Sales report                  | 9 Refunds                         |
| 4 Till Controls report          | 10 Receipt Viewer                 |
| 5 Tender report                 | 11 Shift Viewer <b>EPoS Pro</b>   |
| 6 PayPoint Sales                |                                   |



### Top tip

Use your reports to see what's really going on in your store. We recommend downloading your sales data each month for your VAT returns.

### 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. You can also sort the data by price or quantity. It includes:

- ⊙ Sales comparison for the week, comparing current week vs last week, on a daily basis
- ⊙ Sales of store goods and PayPoint. Includes a performance indicator against the previous period
- ⊙ Sales Performance Indicators, displays top 5 in each category:
  - ⊙ PayPoint Top Sellers
  - ⊙ Goods Top Sellers
  - ⊙ Mix and Match Offers

See your top sellers

### 2. My reports **EPoS Pro**

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.

Save your report filters

### 3. Sales report

View 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

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.

Use this to monitor staff behaviour and trends in your store.

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.

# Back Office reports

## 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

EPoS Core/Pro

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

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.

See your top promotions

## 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.

Use for your VAT returns

## 9. Refunds

This report helps you keep track of products and transactions that were refunded and the reasons why to see where you may be losing money.

Select date range to see list of products out of date, incorrect size, not fit for sale etc. for that time period.

## 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 period 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.

## 11. Shift viewer

EPoS Pro

This report allows you to see an overview of shifts in a given period; today, yesterday, last 7 days, last 28 days or a custom range. Click to drill down in to the details of a particular shift.

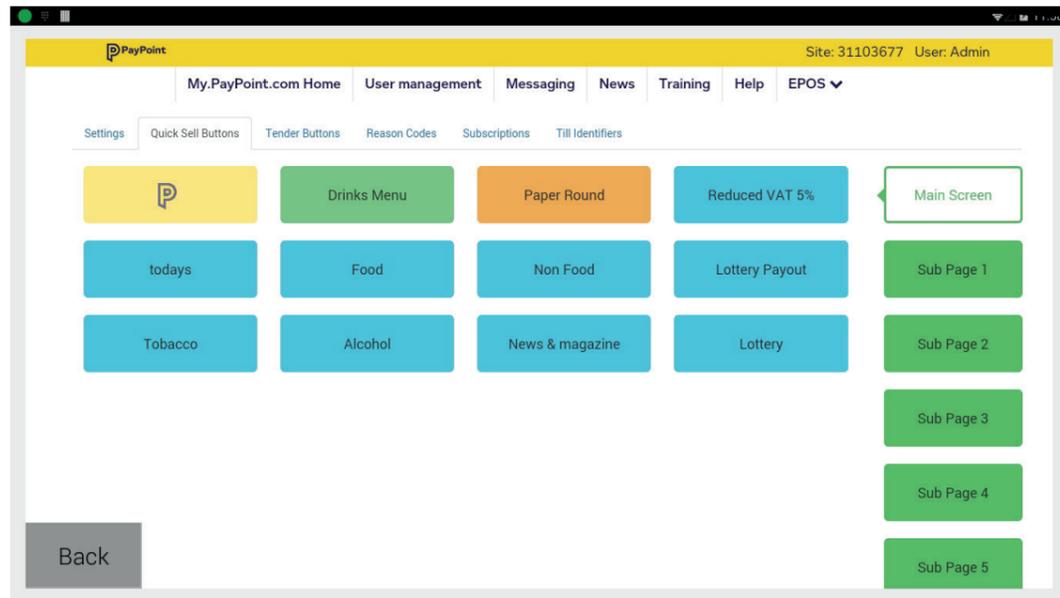
# Till setup for EPoS

These icons indicate features that are only available if you have EPoS Core or EPoS Pro. Upgrade your package to gain access to these features, plus many more business benefits. Visit [paypoint.one](https://paypoint.one) for more information.

EPoS Core/Pro

EPoS Pro

# 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 cannot 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 if barcodes are not available e.g. for a carrier bag charge
- 2 Product** – this sets a description and price so you can quickly enter common items. You may have products without barcodes or fixed prices, and these can also be assigned to a button
- 3 Subpage** – this button will link to another page where you can create a range of buttons (up to 19) for products that do not have a barcode. For example, you could set a button for 'hot drinks menu' which would link through to a page with buttons

## 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** Use the search function to find an existing dump code or use the + New Dump Code to create a new one
- 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** Use the search function to find an existing product or use the + New Product button to create a new one
- 5** Press **Save**



### Top tip

Use quick sell buttons to make selling items in popular categories easier. Go to EPoS Till Setup – Quick Sell Buttons.



### Important

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.

# Quick Sell buttons

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

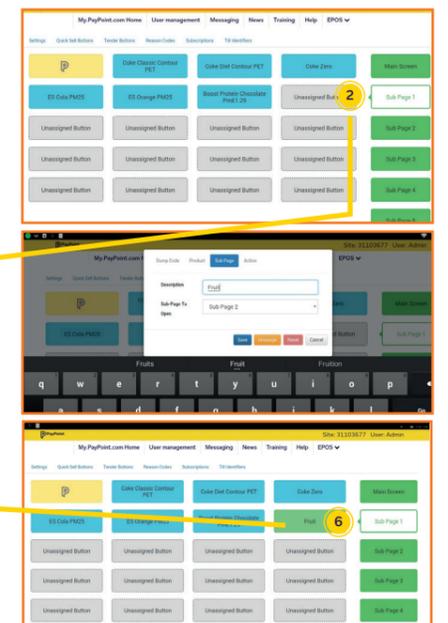
## How to unassign Quick Sell Buttons:

- 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 Sub Page

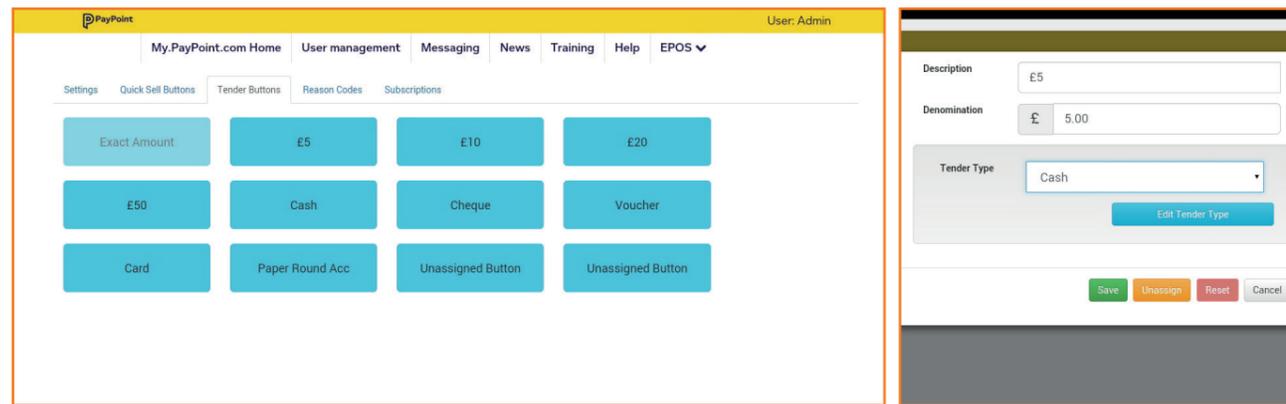
With the 'Sub Page' feature, you can link a button to a page containing up to 19 more buttons – this is particularly useful if you have a number of products within the same category that you wish to group together e.g. 'Fruit and Veg' links to a Sub Page containing individual products such as bananas, carrots and apples etc.

- 1** Till app > More > Back office tab > Till set up > Quick Sell Buttons tab
- 2** Select an unassigned button or unassigned a blue button (see above)
- 3** Select the **Sub Page** tab
- 4** Using the dropdown menu, select the Sub Page you want to assign to this button
- 5** Press **Save**
- 6** Make sure you set up the buttons on the Sub Page you've assigned this button to
- 7** 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



# Tender buttons

LOCATION: my.paypoint.com > EPoS tab > EPoS Till Setup > Tender buttons



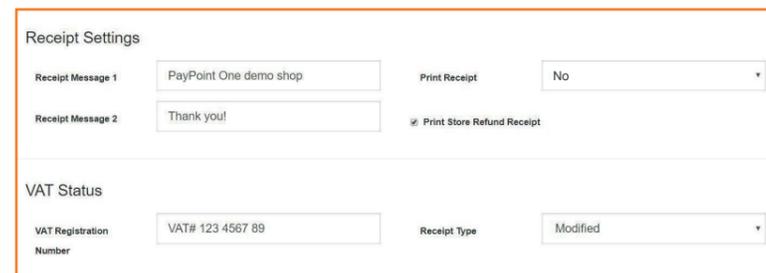
**Top tip**  
The tender buttons can be edited by pressing on the button and changing the value and tender type.

# Till and receipt settings

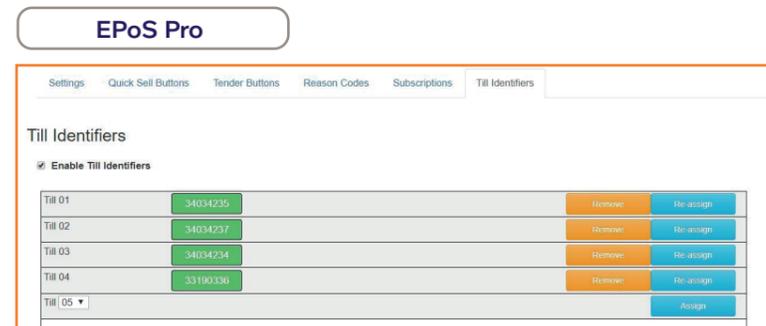
LOCATION: my.paypoint.com > EPoS tab > EPoS Till Setup > Settings

Add a receipt message and choose when your receipts print. **PayPoint transactions will always print a receipt regardless of your receipt settings.**

Add your VAT number by typing VAT# then entering your number. You can also choose whether to print VAT breakdown on your Shift reports.



**Enable your Till Identifier (TID) in the Till Identifiers section.** This makes it easy to define your lanes in store.

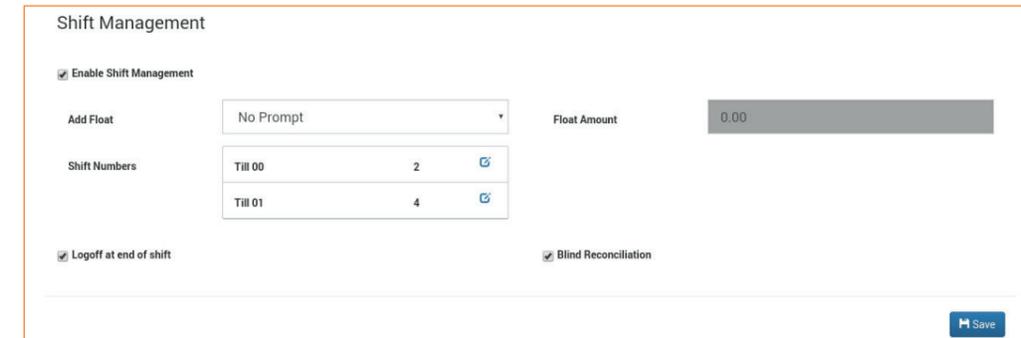


# Shift management

EPoS Pro

LOCATION: my.paypoint.com > EPoS tab > EPoS Till Setup > Settings

Shift management gives you the tools to reconcile cash taken during each shift to the transactions that were carried out on the EPoS during the same period. You can also add float prompts for each shift. **Till IDs must be set up to enable the shift management feature**, you can do this in the settings under the Till Identifiers tab.



**Top tip**  
You must set up Till IDs to enable shift management feature.

## Add float

No prompt, prompt for amount and auto float.

## Shift numbers

Gives the user the ability to change the next shift number for each till to appear on End of Shift reports.

## Log off at End of Shift

Will auto log out the user when an End of Shift report has been printed.

## Blind reconciliation

This will hide the 'Cash in Drawer' and 'Tender Totals' figures from the Shift report to ensure that the person reconciling the shift counts the cash, rather than simply copying the figures from the Shift report into the reconciliation.

## Shift reconciliation

Allows a user to reconcile the cash left in the drawer after a shift.

**Once Shift Management is switched on, there will be more options under the Cash tab of the More button:**

## Shift report

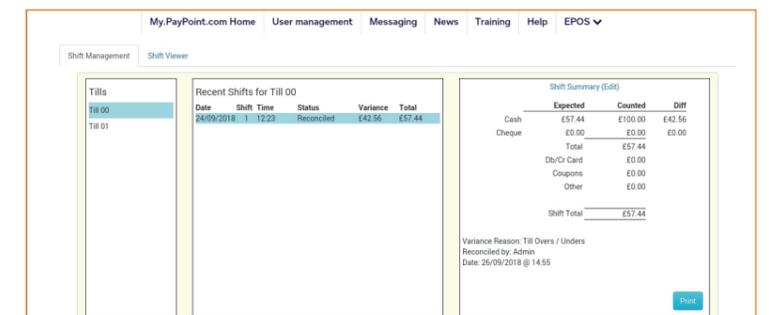
This replaces the X read and allows the cashier to print off a mid-shift totals report.

## End of Shift report

Gives the user the ability to change the next shift number for each till to appear on End of Shift reports.

## End of Day report

Used at the end of the day and triggers PayPoint transactions to upload. These can now be viewed in the back office, like receipts.



# Range adjustments

EPOS Pro

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

Make changes to a whole range of products by type, brand or category in just a few simple steps. For example, increasing all soft drinks by 5p on a hot day or decreasing a seasonal range by 10% in a post-event sale.

- 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.

- 1 Adjust your range by price £, price %, margins or other attributes e.g. age restrictions.

Range adjustment, found under Set Other attributes, makes it quick and easy to set age limits on tobacco and alcohol or reduce categories for a seasonal sale.

Type	Description	Adjustment
Category	Bagged Sweets	Increase the price by 5.00%



### Top tip

For more detailed instructions refer to the training videos on [my.paypoint.com](https://my.paypoint.com).



### Top tip

Age restrictions are found in Set Other Attributes

# Setting up a price embedded product

EPOS Pro

LOCATION: my.paypoint.com > EPOS > EPOS Product Maintenance

- 1 Search for the product to edit or add a new product (add all relevant product information)
- 2 Enter the unique product code e.g. '12345 (this code is 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)
- 3 Tick **Price embedded** (under the attributes tab) – the cost and retail price become greyed out
- 4 Under the barcodes tab, click on the drop down menu and add the correct mask
- 5 Add the product code and then press **Add** and a barcode number will then be generated for the product
- 6 Save the product – this will be available to sell immediately



## 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.

## Setting up a price embedded mask

LOCATION: my.paypoint.com > EPOS > EPOS Till Set up > Settings > Embedded barcode masks

Set up a mask e.g. 20xxxxxyyyyyy 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**. Press **Save**.

**F**irst 2 digits = mask

**X** = product code

**Y** = price

**C** = check digit

# National Lottery scheme

## Setting up pink Lottery tickets as products

Product codes for Lottery tickets – provided by the supplier

EPoS Pro

### Mask: 20xxxxxcyyyy

- > Lotto – 83801
- > EuroMillions – 83803
- > Thunderball – 83804
- > Lotto Hotpicks – 83805
- > EuroMillions HotPicks – 83807
- > Set for Life – 83808

### Setting up a price embedded Lotto ticket:

#### Example of a EuroMillions ticket

- Go to my.paypoint.com > EPOS > EPOS Product Maintenance
- Add new product
- Enter item code e.g. 83803
- Receipt description is the game type e.g. Euromillions
- Category should be **Lottery & Scratch Cards** > Lottery tickets
- VAT code to be **out of scope 0%** which should be £0.00
- Untick the following:** "Is Open Price", "Allow Markdown", "Is Weighted Item", "Generate Shelf Edge Label on Update", "Is Zero price"
- Tick "Allow credit card payment"
- Untick "Refundable"
- Tick "**Price embedded**" – the cost and retail price become greyed out
- On the right, under the Barcode tab, select the appropriate mask from the drop down (20xxxxxcyyyy)
- Enter the product code e.g. '83803' (As a general rule, it is the five digit number that follows the two digit prefix of the barcode)
- Press the Add button. A barcode number will then be generated for the product
- Press Save – the product will be available to sell immediately



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



#### Top Tip

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). **Do not** scan the barcodes highlighted in red.

# Pack sizes and outer package barcodes

EPoS Pro

## Setting up a product based on pack size and outer barcode

LOCATION: my.paypoint.com > EPoS Product Maintenance

- Search for the product to edit or add a new product
- Under the stock tab, add a supplier and make it active
- Press the pen symbol edit button (next to red bin). Please use a Google Chrome browser, this feature is not available on Internet Explorer browsers
- The 'Supplier Data' pop up below will appear showing the current pack size as 1. To create a new pack size and outer barcode, select the green **Add pack** button

Attributes	Restrictions	Barcodes	Tags	Promotions	Stock	Price history
Minimum Stock	3	Active supplier:	Booker	Add supplier		
Level		Company name	Booker	Cost price (£)	0.44	Status
Balance on hand	24					View Order History
Balance on order	0					



#### Important

These edit icons will not show on an Internet Explorer browser. Use Google Chrome.

- > **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

- Press the blue Save button
- You will see two pack sizes in the default pack size dropdown box: one for single units and the new pack size 24 with its own cost price which you will have created
- You can add multiple pack sizes to one product

#### Supplier Data

Add Pack Remove Pack Edit Pack

Default Pack: 1-PP11694

Supplier Item Code: 1-PP11694

RRP: £0.00

PriceMarked: N

Cost Price: £0.00

Pack Size: 1

Status:

Save Close



#### 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).



# Product setup and maintenance

These icons indicate features that are **only available if you have EPoS Core or EPoS Pro**. Upgrade your package to gain access to these features, plus many more business benefits. Visit [paypoint.one](https://my.paypoint.com) for more information.

EPoS Core/Pro

EPoS Pro

# Setting up products with the online product file

EPoS Core/Pro

Using EPoS Core and Pro gives you access to our online global product file, accessible from the PayPoint One terminal, mobile app and EPoS back office via the retailer hub [my.paypoint.com](https://my.paypoint.com). The global product file is kept up to date with thousands of commonly sold UK products including newspapers, magazines and price marked packs. To make things easy for you simply enter your selling price upon first scan or setup unknown products 'on the fly' or at the shelf edge using our free stock manager mobile app.

You can add your own products into your till through the PayPoint One device, the mobile app or the back office – the easiest and quickest way is via the app.

**Important**

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

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

## EPoS product data migration service

We can help you set up your PayPoint One more quickly by importing your products and prices from your existing EPoS system so you're ready to trade in no time. Request a data migration and we will advise you what information is needed.

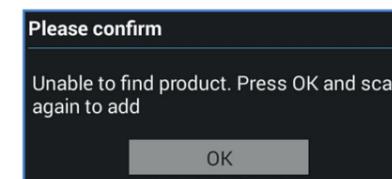
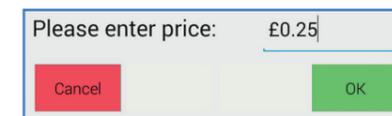
## How to add your own products as you go "on the fly"

- 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

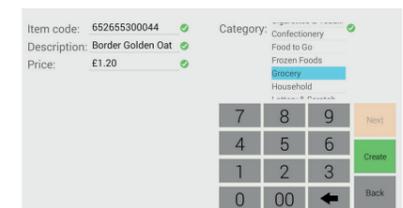
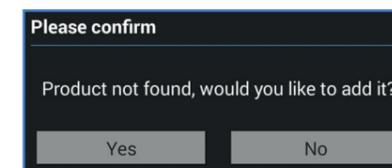


**Top tip**

Products added "on the fly" will be at top level category only. For more detailed product setup use the website back office at [my.paypoint.com](https://my.paypoint.com).

- 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](https://my.paypoint.com)

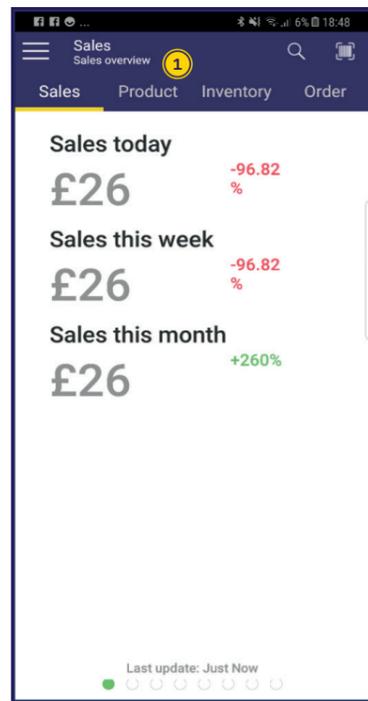


Any EPoS data supplied for use on the PayPoint One including, but not limited to: Product Description, Unit size, Retail selling price, VAT, Category mapping & Age restrictions, are provided for assistance only and the retailers responsibility remains to validate and amend where necessary for use in their store. EPoS data can be edited by the retailer through the [my.paypoint.com](https://my.paypoint.com) portal under the EPoS>EPoS Product maintenance menu, on the PayPoint One Mobile app under the Product>Price change/ Product> Add edit product menus or on the PayPoint One terminal under Item enquiry.

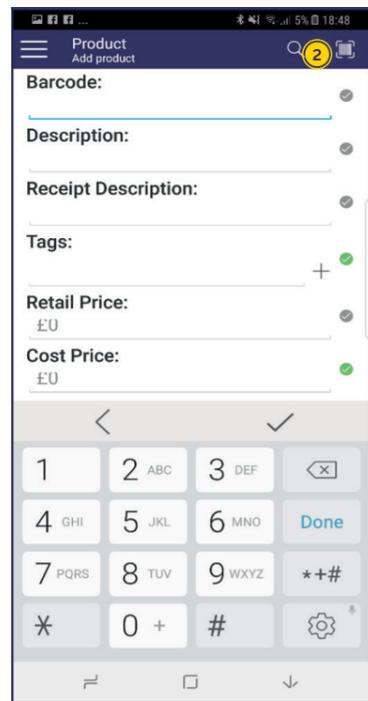
# Adding products using the mobile app

Open or Download and Install the PayPoint One Stock Manager app - (Google Play Store for Android or the App Store for IOS)

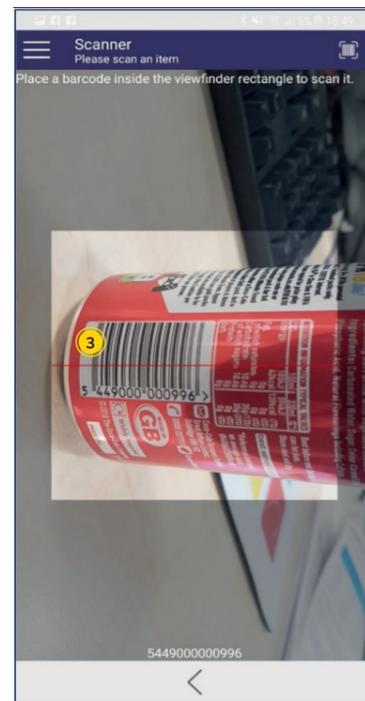
Once the app has been installed / opened log in and follow the steps below:



1 Select 'Product'



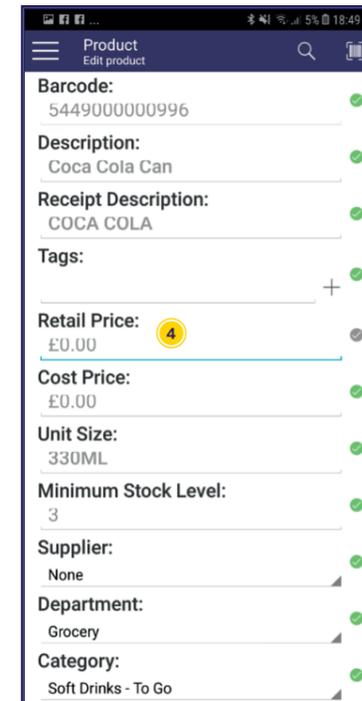
2 Select the Scanner icon in the top right corner to open the scanner



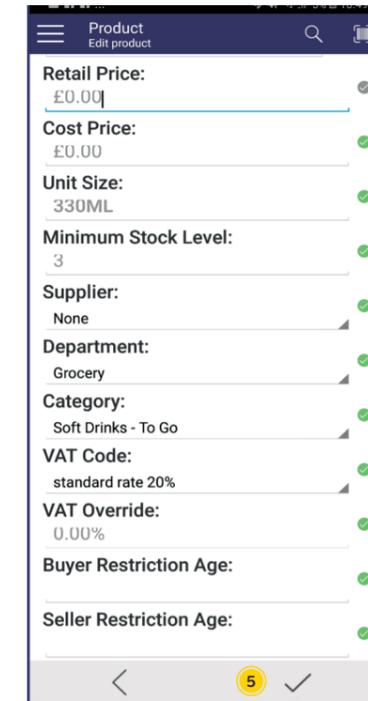
3 Align the product barcode along the red line on the screen

**Top tip**  
 If the item is already in the Global Product File – you will only need to add your selling price as all other fields will automatically populate.  
 If the product isn't recognised please complete all fields with greyed-out ticks

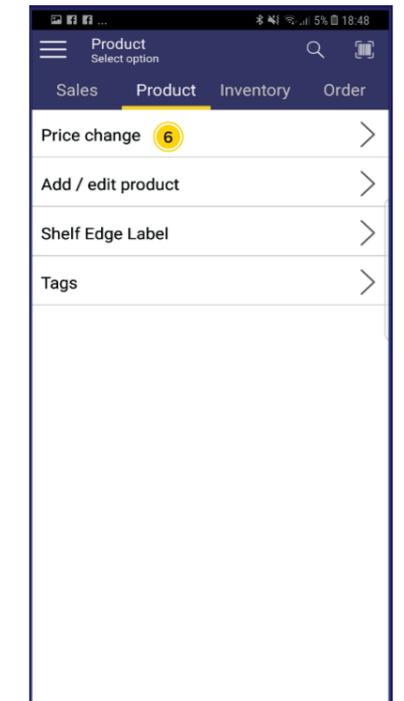
# Adding products using the mobile app



4 Add the "Retail price" you want to sell the item for and ensure all other fields are correct



5 Once you are happy with the information shown, you can press the tick on the bottom right to finish adding the product to your PayPoint One



6 To change the price of a product already in your system via your mobile app. Scan the barcode, adjust the price and tick to confirm

To add a new product not found on the Global Product File, select **Add/edit product** (To maintain an existing product, simply scan and use the pen icon to **edit**).

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.

**The following information should be filled in for reporting/stock management 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

**Attributes tab:**

Use these tick boxes 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

EPoS Pro

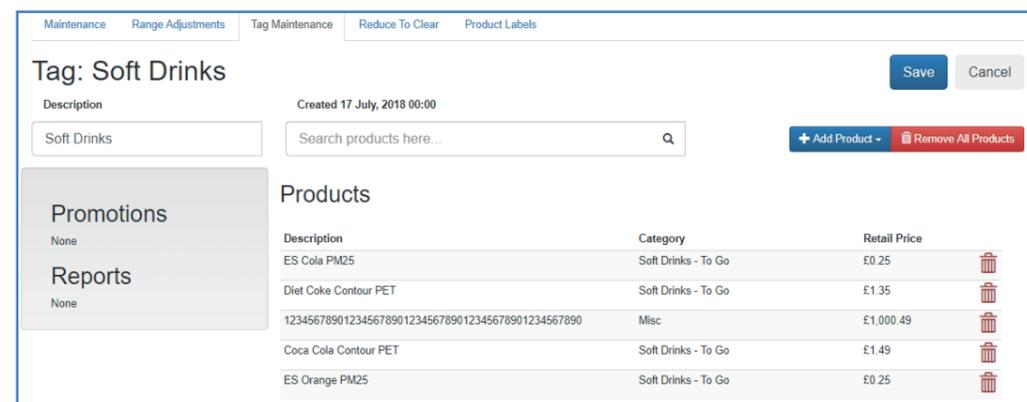
- ⊙ **Is weighted item** – used for weighted products that are sold by g/kg. Profit (amount) automatically filled in when the cost and retail price is filled in
- ⊙ **Generate shelf edge label on update** – a shelf edge label is automatically created, ready to print, when a product's price changes. You can also print promotional shelf edge labels with effective date and promotion end date included
- ⊙ **Price embedded** – used for products that have prices within the barcode

**Restrictions tab:**

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

**Barcodes, Tags and Promotions tabs:** EPoS Core/Pro

- ⊙ **Barcodes** – associate more than one barcode with a product e.g. where a supplier issues an item in seasonal packaging under a unique barcode. **Remember to add the barcode**
- ⊙ **Tags (key words)** – Tags can be associated with a product so you can run promotions and reports on groups of products. Select the Tags tab, type in the word you want to use and press add
- ⊙ **Promotions** – shows you if the product is included in any active promotions with the start and end date



**Top tip**  
Set up tags to associate groups of products for easy reporting and sales analysis.

Stock tab: EPoS Pro

- ⊙ **Minimum stock level** – this is default as 0 per product. Change to suit your needs and use when you create suggested orders
- ⊙ **Balance on hand (BOH)** – what the system thinks is in stock. You can check this on the app under each product. If this is incorrect, it means that some products were not scanned out at sale. All products must be scanned out for an accurate BOH
- ⊙ **Balance on order (BOO)** – shows that there is a pending order and how much stock is waiting to be delivered and booked into store
- ⊙ **Active supplier** – 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. 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
- ⊙ **Stock movement report** – monitor the movement of your stock. Shrinkage (theft) and wastage (adjustments) are all listed and can be filtered by today, yesterday, last 7 or 28 days or a custom range

**Price history tab:**

- ⊙ **Price History** – shows history of price changes for a product EPoS Core/Pro

**Restrictions tab:**

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

Once the item has been set up, press **Save. The item will then be ready to sell immediately.** You can generate new shelf-edge labels to update price markers in store



**Top tip**

Watch the training video to help you set up and edit products quickly and easily: [my.paypoint.com](https://my.paypoint.com)



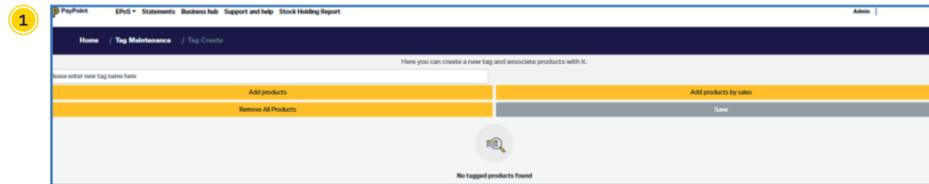
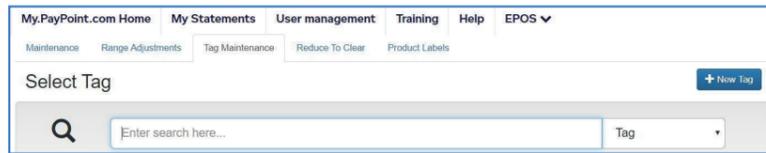
**Top tip**

We can help you set up your PayPoint One more quickly by importing your products and prices from your existing EPoS system so you're ready to trade in no time. Send your product and price file (Excel/CSV) to [Import@paypoint.com](mailto:Import@paypoint.com)

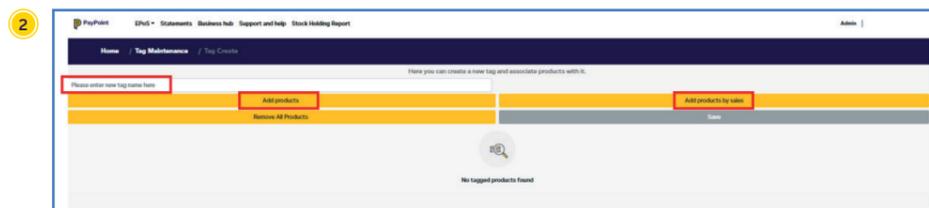
# Tag maintenance

EPOS Core/Pro

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

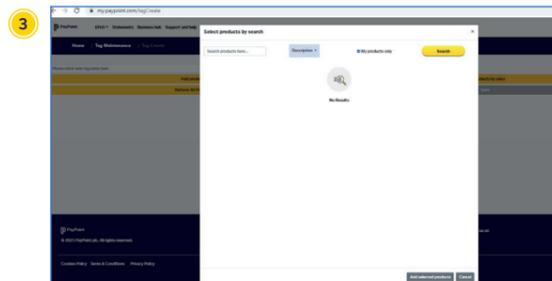


Create New Tag

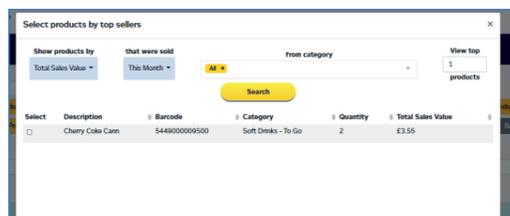


Enter a name for your tag in the field highlighted, then choose how you'd like to add products to your tag.

By searching for a product itself, or by searching for products from your top sellers by qty and price.



If you've chosen to add a product by searching for a specific product attribute, you'll see the below pop-up box. Search for a product by typing in a description, or scanning a barcode, and click "Search".

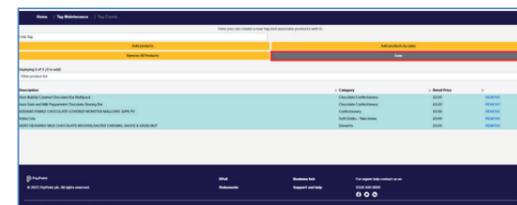


If you've chosen to add products by sales, you need to select whether you want to see results by sales quantity or value, a date range, and the number of products, then hit Search.

For example: by sales value, this month, across all categories, my top 10 sellers.



Select the products you want to add from the search results by clicking the checkbox on the right, and click "Add Selected Products"



Then, click "Save"



### Top tip

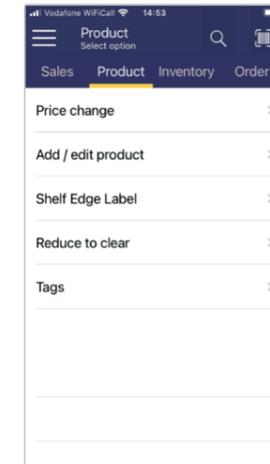
Its easier to create a promotion with an empty tag, and fill the tag on the shop floor using the mobile app.

# Tagging process using the PayPoint One mobile app

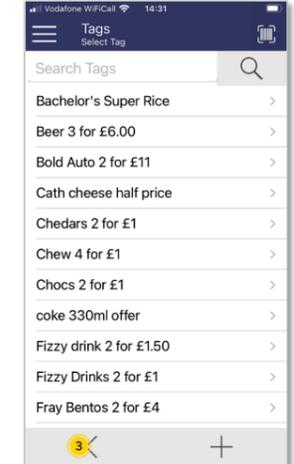
Download the PayPoint Stock Manager app from the Google Play Store or App store.



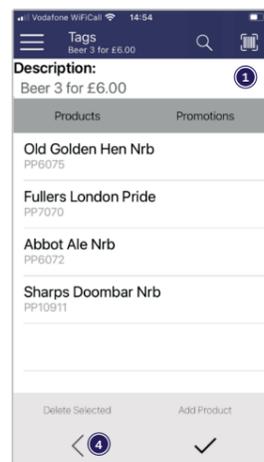
1 The first time using the app you will need to sign in using the same details you use for your terminal or accessing the portal on your laptop



2 To add a tag, go to the Product tab on the screen and then select the Tags option



3 Press the + icon and when prompted, add a new tag name. Or choose a current tag already in use to update (add or remove products) e.g. crisps 2 for £1.00



4 Once in the Tag menu:

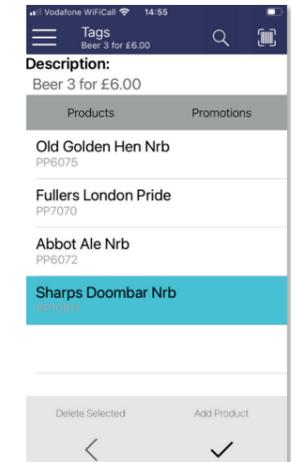
1 Add a product by pressing the camera option in the top right and scan the barcode – Alternatively, press Add Product to search description

2 Press the + icon to add the product to the Tag (use the camera option followed by the +icon to continue adding products)

3 Press the tick icon to confirm the updates to the Tag, the Tag is now ready to use

4 Exit without saving if you are just viewing products in the tag

5 Highlight a product to delete, press Delete Selected and then the tick icon to update



5 Deleting a product from a Tag is just as easy.

Simply select the product you wish to delete, which then becomes highlighted then press delete selected and select the tick icon to confirm.

You can choose multiple items to delete from the Tag

# Setting up shelf edge labels

## Bulk printing shelf edge labels

EPoS Pro

Easily mark up your store with shelf-edge labels. They also include a barcode for inventory management and product maintenance.

Shelf Edge Label Settings			
Default Till Printer (TID)	None	Margin Top (mm)	0
Shelf Edge Label Free Text		Margin Left (mm)	0
Was / Now Price Threshold	% 5.00		

## Shelf edge label settings:

LOCATION: Till app > More > Back Office > Till > Settings

## Default till printer (TID)

Enter the PayPoint One Terminal ID (on the 'Terminal screen, swipe down from the top left 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.

LOCATION: my.paypoint.com > EPoS tab > EPoS Shelf Edge Labels > Settings tab > Shelf Edge Label Settings

## 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 EPoS Pro

This will appear at the bottom of the label.

## 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:

LOCATION: my.paypoint.com > Product maintenance

Search for and choose a product. Under the edit option is a tab called Attributes with a box that is ticked by default called 'Generate shelf edge label on update'. This means that when a product 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 (ad-hoc) 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.

## Printing shelf edge labels in bulk

LOCATION: Stock Manager app on your 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

**Top tip**  
You must be within the Till app and with an empty basket for the labels to print.

- 3 The batch labels will print out in the same order you scanned them.
- 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 desk top A4 printer
- 3 The labels will print out in the order you select to help you when you fix them to the shelves when using the mobile app
- 4 Confirm that the batch printed correctly

# Promotions

These icons indicate features that are **only available if you have EPoS Core or EPoS Pro**. Upgrade **your package** to gain access to these features, plus many more business benefits. Visit [paypoint.one](https://www.paypoint.one) for more information.



# Promotions explained

EPoS Core/Pro

LOCATION: [my.paypoint.com](https://my.paypoint.com) > EPoS tab > Promotion Maintenance > + New Promotion

## 1 Buy one get one free.

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



## 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.

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. e.g. 3 for 2



## 5 Fixed price style offer (most commonly used promotion type)

If a number of items are added to the basket, they will be sold for a fixed price. e.g. a meal deal or save £x when you spend £y



Spend value = £15  
or  
Quantity = 3 = £2.50 off

# Tagging products for promotions

EPoS Core/Pro

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

## 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 fixed price offer promotion based on the ‘Cadbury’ tag. This would apply the promotion to any basket that contains two ‘Cadbury’ item.

## 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.

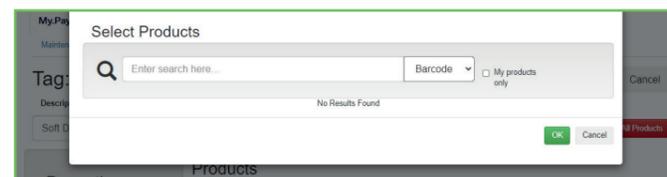
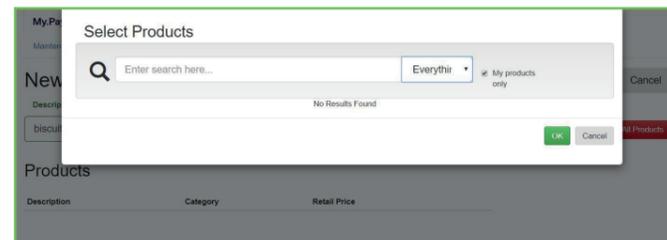
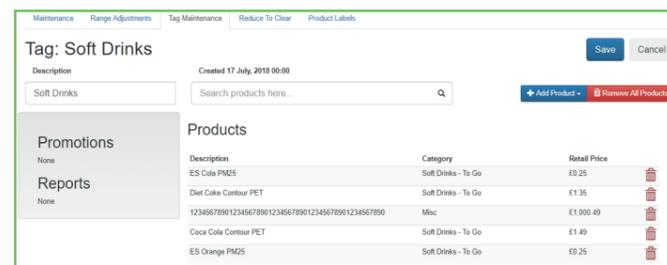
For example, if you’ve categorised a variety of chocolate bars in your store as ‘chocolate’ and then set up a fixed price offer promotion based on the ‘chocolate’ category, this would apply the promotion to any basket that contains two ‘chocolate’ items.

## How does it work in practice?

**Tag a bay** – tag any bay in your store to see how it’s working. For example, a new bay of health foods – tag each product on the bay and from there you’ll be able to quickly run reports to tell you how well each product is selling and how the bay is performing.

**Tag a promotional bay** – tag all products on a promotional aisle-end for example, Christmas or Easter seasonal products. Run reports to see a breakdown of sales for each product on that bay giving you powerful insight for future stock and promotion decisions.

**Tag anything** – use tags to group anything you’re interested in to see how sales are performing in a matter of minutes. For example, coffee brands – see how each product is performing with easy sales data reports to make stock decisions.



### Top tip

The ‘tagging’ functionality can be the key to unlocking valuable insight that can help grow sales, footfall and profits. Watch the training video on [my.paypoint.com](https://my.paypoint.com).

# How to add promotions

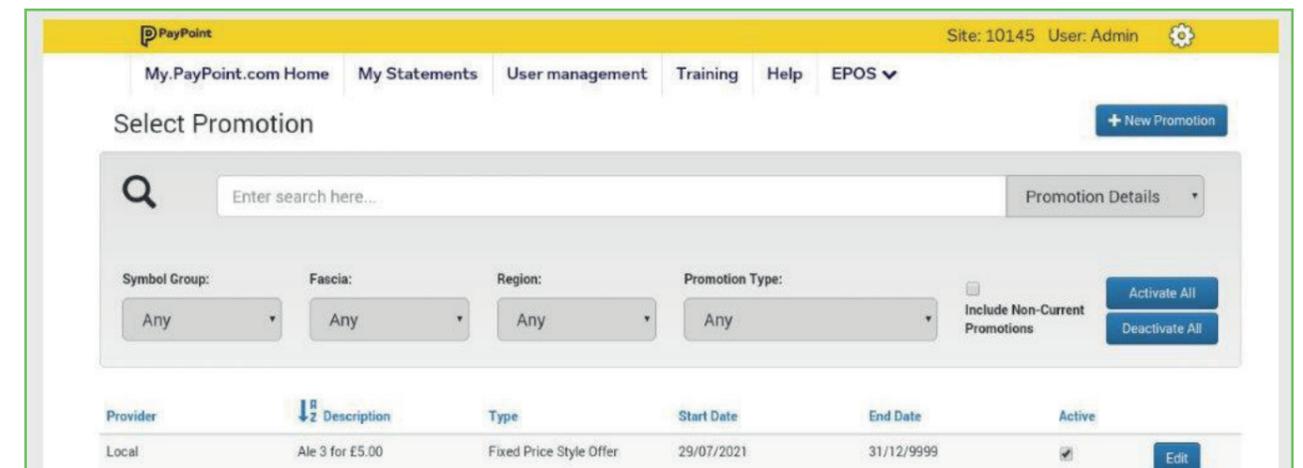
EPoS Core/Pro

## PayPoint One terminal:

- 1 From the homescreen, open the Till app
- 2 Select the orange **More** button
- 3 Under the back office tab, select **Offers**
- 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

## From my.paypoint.com:

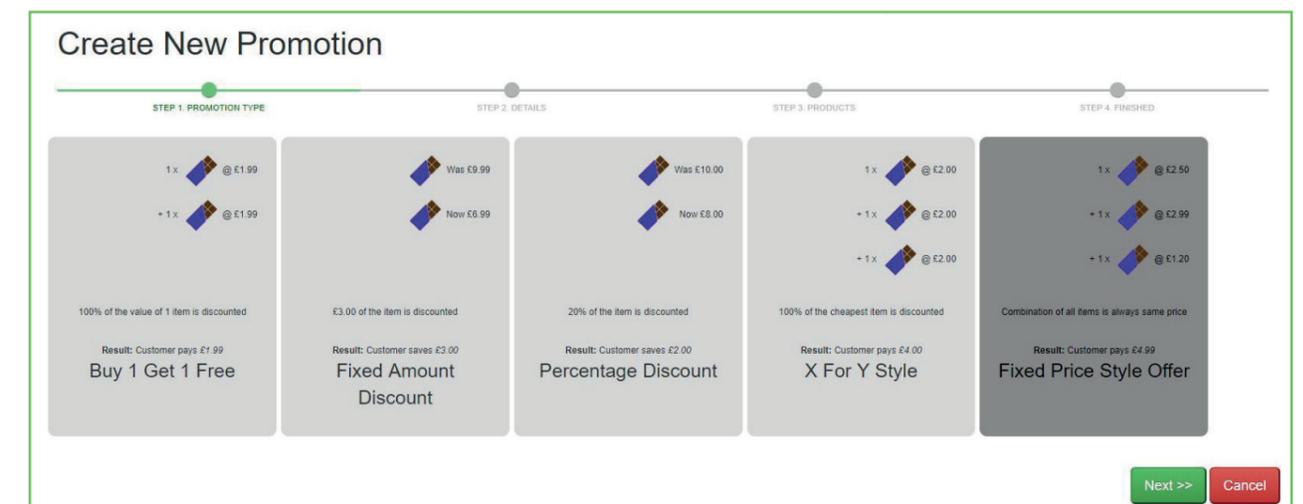
- 1 Login to [my.paypoint.com](https://my.paypoint.com) with your device username and password
- 2 Select the **EPoS** tab
- 3 Select **EPoS Promotion Maintenance**
- 4 The **Select Promotion** screen is displayed where a list of previously set-up promotions will appear. You can search for promotions using a description, start/end date, tag or promotion type



- 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**



### Top tip

Use the EPoS reporting tab to analyse your promotions in more detail – see what’s working in your store.

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'

### Create 'Fixed Price' Style Offer

STEP 1. PROMOTION TYPE    STEP 2. DETAILS    STEP 3. PRODUCTS    STEP 4. FINISHED

**Description** Meal Deal    **Receipt Description** Meal Deal

**Start Date** Monday 5 August 2019

**Does Not Expire**

**Fixed Amount (£)** £ 3.50

**Strapline** Special Offer

**Information**

Next >>    Cancel

8 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

### Edit 'Fixed Price' Style Offer

STEP 1. PROMOTION TYPE    STEP 2. DETAILS    STEP 3. PRODUCTS    STEP 4. FINISHED

**Details**  
Description: 2 for £1.50  
Receipt Description: 2 for £1.50  
Start Date: Thursday 10 January 2019  
End Date: Does Not Expire  
Strapline: 2 for £1.50  
Fixed Price: £1.50  
Information:

**Tag**  
2 x Local supplier 1 (1)

**Example**  
2 x @ = £1.78  
Customer Pays: £1.50  
Customer Saves: £0.28

Save    << Prev    Cancel

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

**Top tip**  
You can also use the app to add tags to your products. Download for free on Google Play or the App Store.

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**

### Create 'Fixed Price' Style Offer

STEP 1. PROMOTION TYPE    STEP 2. DETAILS    STEP 3. PRODUCTS    STEP 4. FINISHED

**Details**  
Description: Meal Deal  
Receipt Description: Meal Deal  
Start Date: Monday 5 August 2019  
End Date: Does Not Expire  
Strapline: Special Offer  
Fixed Price: £3.50  
Information:

**Customer Buys For £3.50**

+ Product    + Category    + Tag

<< Prev    Next >>    Cancel

My.PayPoint.com

### Create 'Fixed Price' Style Offer

STEP 1. PROMOTION TYPE    STEP 2. DETAILS    STEP 3. PRODUCTS    STEP 4. FINISHED

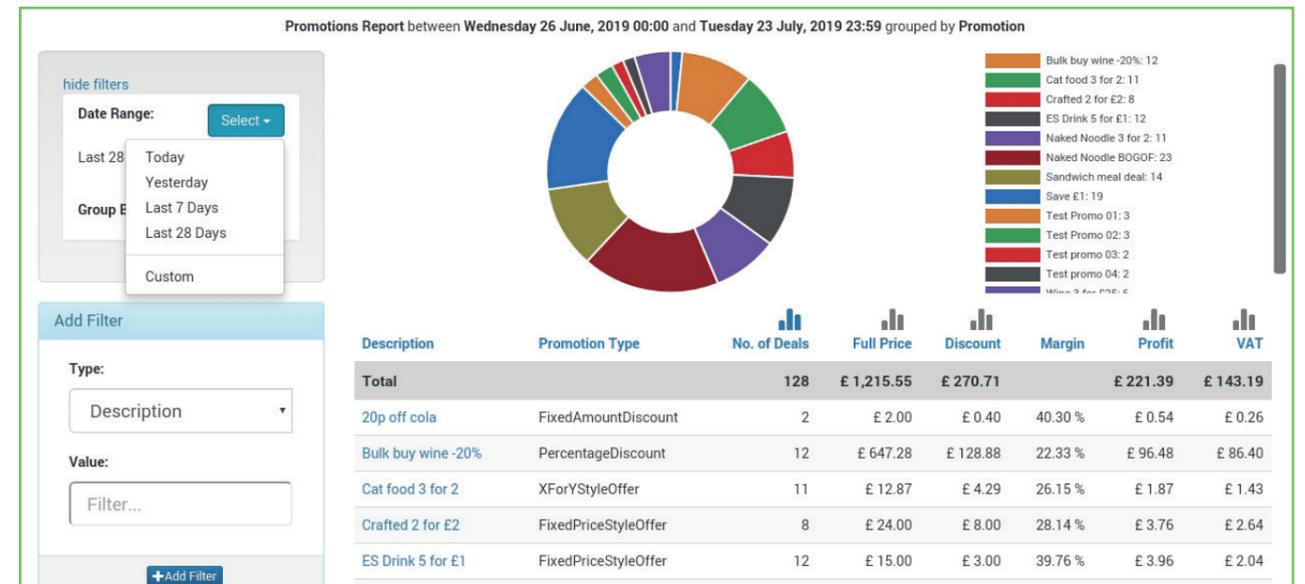
**Details**  
Description: Meal Deal  
Receipt Description: Meal Deal  
Start Date: Monday 5 August 2019  
End Date: Does Not Expire  
Strapline: Special Offer  
Fixed Price: £3.50  
Information:

**Select Tag**    + New Tag

Enter search here... Tag

Name	Product Count	Report Count	Select
1664 6 for £6.50	2	0	Select
5014379003475	0	0	Select
8855790000684	0	0	Select
Ale 3 for £5	14	0	Select

+ Category    + Tag



# Stock management

These icons indicate features that are **only available if you have EPoS Core or EPoS Pro. Upgrade your package** to gain access to these features, plus many more business benefits. Visit [paypoint.one](https://www.paypoint.one) for more information.

EPoS Pro

# 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](https://my.paypoint.com) > EPoS tab > EPoS Stock > Suppliers tab > New Supplier

The screenshot shows the 'New Supplier' form in the EPoS Pro system. The form is titled 'New Supplier' and is located under the 'Suppliers' tab. It contains the following fields:

- Supplier Reference: Wholesaler A
- Customer Reference: ABC321
- Company Name: Wholesaler A
- Contact Name: Mike
- Telephone: 0781234567
- Notes: ACC no: 34671432

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

- 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
- Save:** click save to publish changes made

### 2 Add a supplier to a product

LOCATION: [my.paypoint.com](https://my.paypoint.com) > EPoS Product Maintenance tab > select product

- Within a product maintenance page, click on the **Stock** tab
- Press the green **add supplier** button
- Choose the supplier from the list
- You can then add more than one supplier to the list
- Under **active supplier**, activate the supplier for the product
- Press **Save**

**Top Tip**  
To add products to a supplier in bulk, use our Range Adjustment feature.

# Process for Inventory

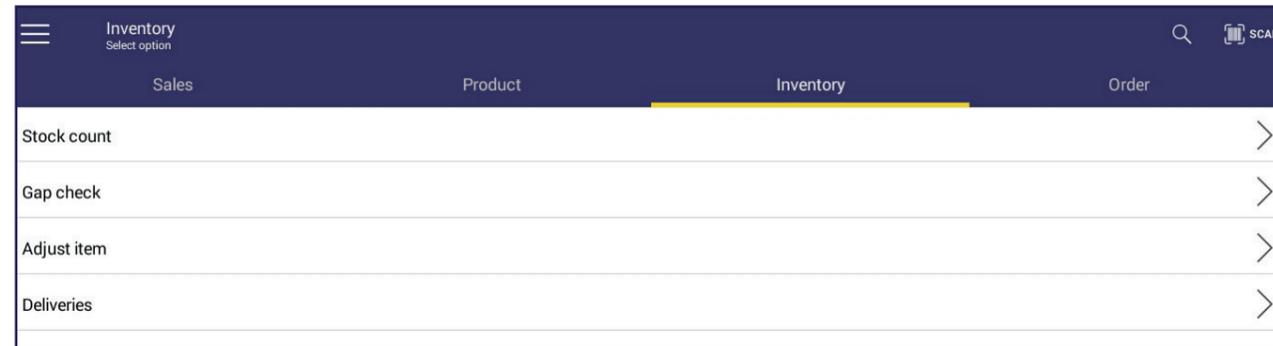
EPoS Pro

LOCATION: Stock Manager app (Android or IOS smart device)



## Top tip

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.

# PayPoint Loyalty Programme, Counter Cash & Supplier Integration

These icons indicate features that are **only available if you have EPoS Core or EPoS Pro**. Upgrade **your package** to gain access to these features, plus many more business benefits. Visit [paypoint.one](https://paypoint.one) for more information.

EPoS Core/Pro

# PayPoint Loyalty Programme

As a PayPoint retailer, you can unlock deals to help you and your business. Whether you're looking to offer home delivery services to your community or need a little extra financial help, the PayPoint Loyalty Programme has you covered!



PayPoint have an exciting new partnership with Snappy Shopper who support local convenience stores by offering them the ability to deliver groceries to their customers in as little as 30 minutes.



Access exclusive offers, rewards and advice from leading brands with MyStore+. Download the mobile app to quickly scan product barcodes already in your store.



Join the Association of Convenience Stores (ACS) and access marketing leading advice to support your store. ACS Membership is available for free to all PayPoint One retailers.



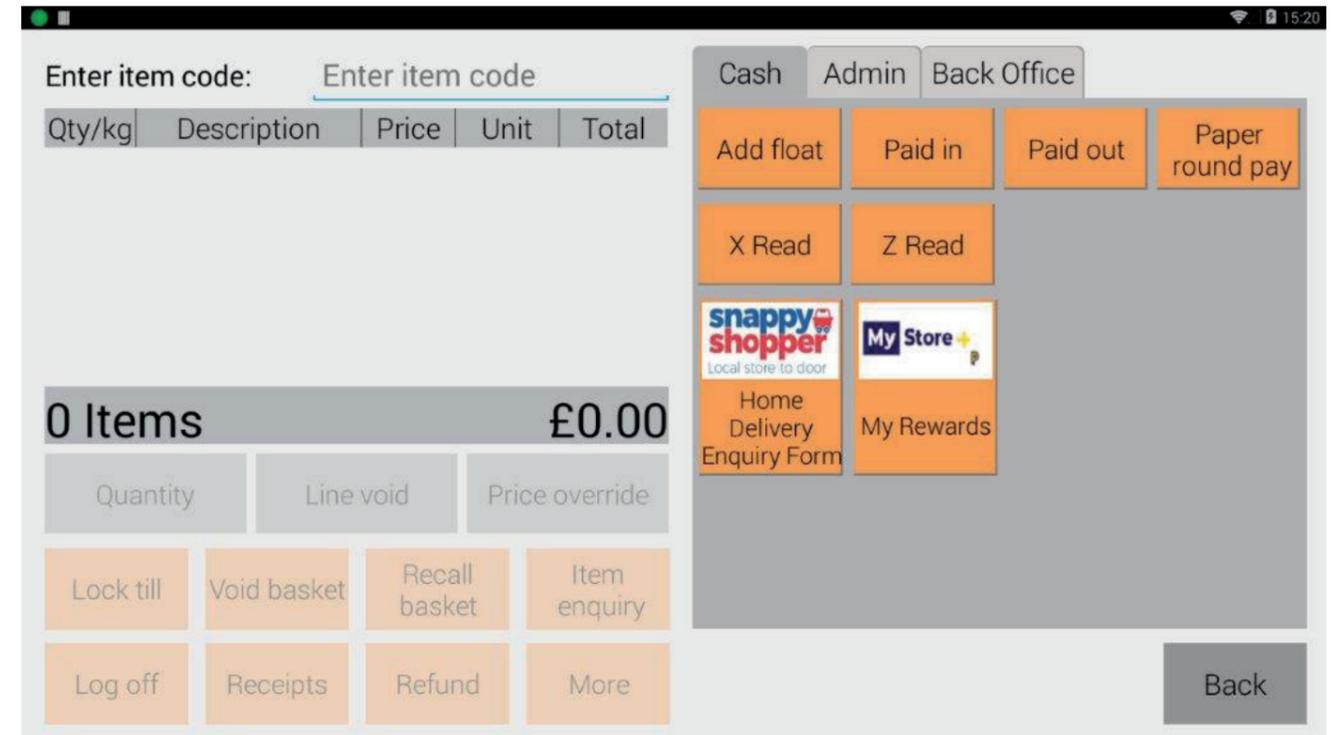
Flexible business funding for PayPoint retailers. This type of funding can help retailers focus on growth, whether it's creating new jobs, investing in new projects, buying stock or simply boosting cash flow.



Great business account available to PayPoint retailers. No credit checks for account opening, instant online decision, very competitive rate for paying-in cash.

For more information and links to these services, visit [retailer.paypoint.com/loyalty-programme](https://retailer.paypoint.com/loyalty-programme) and follow the instructions on the screen.

# Snappy Shopper



### Top tip

To register, go to the More option and then the Cash tab and select Snappy Shopper. Then follow the simple on screen instructions.

## The Snappy Shopper app will appear on all PP1 terminals as standard.

There are 2 ways you can register your interest in Snappy Shopper:

- 1 Open the app and fill in your name, email address and PP site ID
- 2 In the till app, on the cash menu, is a Snappy Shopper enquiry button. This will take you to the same webform to fill out your name, email address and PP site ID

Once you have done this, you will receive an email from Snappy Shopper. During onboarding, and moving forward, you will have a dedicated account manager to be your point of contact and offer support and training on how to use the service. They will show you how to accept orders, process them and use the other functionality available via the Snappy Shopper apps.

For Core and Pro users, you will be able to use the tagging functionality on PP1 to select and deselect the products you want to include on your Snappy Shopper product page. You can automatically update prices by just changing them on your PayPoint EPoS. For base customers, you need to share a product file with Snappy Shopper from your EPoS system and manually manage your online store via the Snappy Shopper dashboard on the app.

# MyStore+ Rewards

PayPoint retailers can access offers, rewards and advice from leading brands with MyStore+.

## Benefits:

- ✔ Offers & Rewards - access exclusive offers and rewards from brands so you can earn while growing your business at no extra cost
- ✔ Advice - category and brand advice enabling you to grow your business
- ✔ Tailored to you - personalised advice and offers for your store when you share insight and opinions with brands

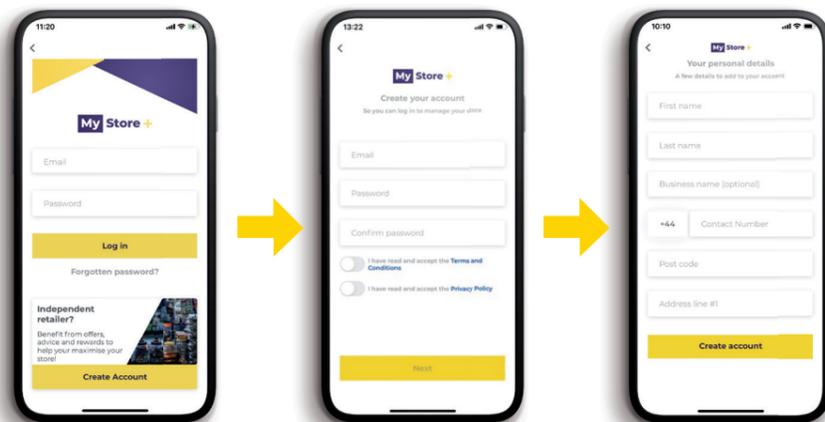


Getting started is very easy. Simply scan the QR code to download the MyStore+ app. The app is available on both the Apple App Store and the Google Play Store.

Visit [paypoint-mystore.com](https://paypoint-mystore.com) for more information on brands, offers and benefits currently live on the MyStore+ app.

## Sign Up

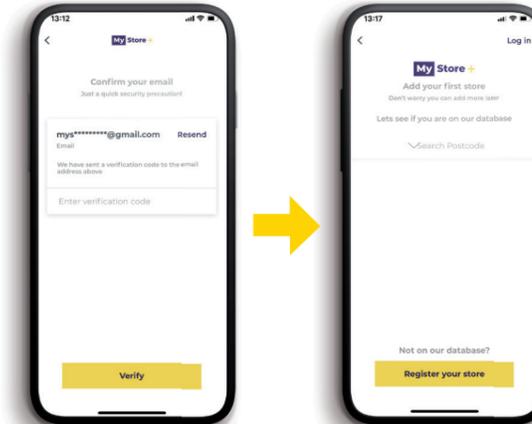
### 1 Create a user account



Click on **“Create Account”** and follow the in app instructions.

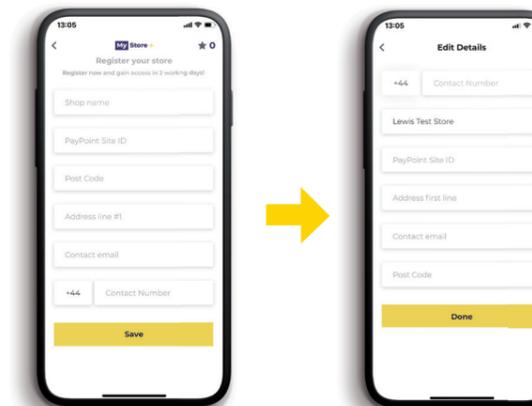
# MyStore+ Rewards

### 2 Account email verification



A user will get sent an email verification code upon creating an account. This is provided instantly, and entering the code successfully will allow for progress onto setting up a store.

### 3 Setting up a store



Once a user account is approved, they can then add stores to their account to redeem offers against.

PayPoint retailers also have the opportunity to enter their PayPoint Site ID here.

# PayPoint Counter Cash

## Cash Withdrawals

Retailers will need to have integrated PayPoint Cards to be able to offer Counter Cash. Once training has been completed, the service will be activated on your terminal. A full, in-depth training guide will be provided to you once your registration is complete and will include your terms and conditions as well as retailer service requirements.

Cash withdrawals must be processed as their own transaction and not part of another basket spend. Once a customer withdrawal has been completed you will be able to process other transactions.

- 1 Launch the **Till** app and select the **More** menu
- 2 Ensure you are on the **Cash** tab and then select the **Counter Cash** button
- 3 Select the **Cash Withdrawal** button
- 4 Ask the customer how much they would like to withdraw and confirm you have the cash available to provide before completing the transaction by selecting the **Confirm** button
- 5 Select the amount to withdraw: Use the pre-set buttons or enter manually using the number pad. The customer can withdraw anything from £0.01 to £50 in any denomination e.g. the customer can withdraw £3.56
- 6 Select the **Confirm** button
- 7 Ask the customer to insert their card into the PIN Pad
- 8 The customer is required to enter their PIN and press enter
- 9 Ask the customer to remove their card from the PIN Pad
- 10 Always count out the cash in front of the customer, hand them their cash and select **OK**



### Top tip

Ensure you have enough cash in your drawer before you start processing the transaction



### Important

Please check you are handing over the correct notes, that they are in good condition and are legal tender

# PayPoint Counter Cash

## Cash Reversal

Cash reversals can be conducted for customers who have just withdrawn money from their account. A reversal must be completed immediately after their withdrawal transaction and only after the customer has given the money back.

- 1 Launch the **Till** app and select the **More** menu
- 2 Ensure you are on the **Cash** tab and then select the **Counter Cash** button
- 3 Select the **Reversal** button
- 4 Enter the four-digit transaction number found on the customers withdrawal receipt and press **Enter**
- 5 Enter the amount required to be reversed using the pre-set amount buttons or enter manually using the number pad



### Important

You can only process a reversal for the full amount of the customers withdrawal

- 6 Ask the customer to insert the same card as the withdrawal into the PIN Pad, customers do not need to enter their pin
- 7 The customer can remove the card when requested and click OK on the pop up on screen



### Top tip

Just like withdrawals, this transaction can only take place if you have an empty basket



### Important

A reversal must be completed immediately after the withdrawal transaction. If another transaction has been made after the withdrawal, the reversal will fail and the customer will need to raise a LINK claim via their bank/building society. A reversal must be completed within ten minutes of the withdrawal transaction.

# PayPoint Counter Cash

## Balance enquiry

Customers are able to check their bank balance at the counter. It is vital that you do not look at the PIN Pad screen or the customers' receipt during this transaction.

- 1 Launch the **Till** app and select the **More** menu
- 2 Ensure you are on the **Cash** tab and then select the **Counter Cash** button
- 3 Select the **Balance enquiry** button
- 4 Advise the customer that their balance will be displayed on the PIN Pad and select the **Confirm** button
- 5 Ask the customer to Insert their card into the PIN Pad
- 6 The customer is required to enter their PIN and press the enter button
- 7 The customers balance will now be displayed on the PIN Pad. Advise the customer to either select the Enter button to print the balance or the cancel button to skip
- 8 Ask the customer to remove their card. Their balance enquiry will immediately disappear from the screen



### Top tip

Ensure the customer can see you print the receipt and hand directly to them



### Important

Do not look at the receipt, ensure you place the customer's receipt face down on the counter

# Booker EPoS link

EPoS Pro

An EPoS link is now available for PayPoint One Pro retailers who are members of Premier, Family Shopper and Shop Locally.

The link is included in the EPoS Pro monthly service fee\* and offers the following benefits:



Transfer prices from your existing EPoS.\*\*



Receive depot RRP and cost prices.



Place orders and receive deliveries through the app.



Automatic consumer promotion packs.

### How to activate your EPoS link

**Important:** You need to have an active membership with Booker before trying to log in to this page. Details required as follows:

- Customer Number – your 9-digit Booker number
- Membership Type – Premier, Family Shopper or Club/Shop Local
- Region – England, Wales, Scotland and Northern Ireland
- Enable Auto Promo Updates (Mandatory Promotions will be activated automatically)

- 1 Log on to [my.paypoint.com](https://my.paypoint.com)
- 2 Go to **EPoS > EPoS Stock > Suppliers > New subscription** – choose Booker from the selection
- 3 Use your existing address details as per the Booker invoice
- 4 Tick the box to confirm you agree with the terms & conditions
- 5 A pop up will appear asking for more retailer details
- 6 Press the green Test Connection button followed by **Save**. Please allow 5 days to get connected while Booker verify

Please email [EPOSTraining@paypoint.com](mailto:EPOSTraining@paypoint.com) for additional support. If after **5 working days** you still do not have a successful connection, please call PayPoint on **0330 400 0000\***.

My Subscriptions				New Subscription
Subscription ID	Supplier Name	Status	Last Updated	
3	Booker	Connected	16/07/2020 03:39:23	<a href="#">Edit</a> <a href="#">Refresh</a>



### Important

The Booker EPoS link is only available with one EPoS system. Once you have activated your link with PayPoint, all your price updates and electronic delivery notes will move over from Booker to your PayPoint One.

\*The first time you register your Booker customer number with PayPoint, a one-off £25.00+VAT administration fee will be applied per site.

\*\*To help you set up your products and prices, send your product file, along with your site details, to [import@paypoint.com](mailto:import@paypoint.com).

# How to set up your Booker EPoS link

## Getting your PayPoint One ready for your EPoS link

### Setting up products to work with Booker

All products need to be associated to a supplier, in this case Booker. Booker products automatically have an association via the link which allows you to manage your inventory. You must set Booker as the active supplier for any products associated with Booker so PayPoint One uses the correct cost prices and order packs.

The active supplier can also be set as you place your orders as you use the mobile app.

### Auto RRP - [my.paypoint.com](#) > EPoS > EPoS Stock > Auto Prices

By using the Auto RRP function, the active supplier and your product pricing will be set automatically in your back office. This will also apply to all future product updates against the opted in categories.

#### The benefits of having Auto RRP selected are:

- ⌚ Automatically updates your products with Bookers RRP
- ⌚ Automatically adds the Booker cost price to your products
- ⌚ Automatically prepares Shelf Edge Labels when there is a change

### RRP mark up - [my.paypoint.com](#) > EPoS > EPoS Product Maintenance

You can adjust the RRP by using the mark up function in your back office for individual products. This will always apply the mark up to any price updates received. This is located under the supplier pack within the stock tab of the product.

#### Setting up Booker auto-RRP

#### Setting up Booker auto-RRP mark up

### Supplier updates - [my.paypoint.com](#) > EPoS > EPoS Stock > Supplier Updates

You can view daily updates to Booker products from this section in [my.paypoint.com](#). Using filters, check margins for RRP's against old/new cost prices and choose what price you would like to set against those products (please see the legend tab, which explains the meaning of each colour).

### Range adjustment - [my.paypoint.com](#) > EPoS > Product Maintenance > Range Adjustment

You can use Range Adjustment to set your active supplier against your products. This will be a one-time process and any future products within the chosen category or tag will be updated accordingly.

For more detailed instructions, view the training video on [my.paypoint.com](#).

### Monthly promotions – Booker promotion periods

#### - [my.paypoint.com](#) > EPoS > EPoS Promotion Maintenance

Booker will publish promotions in their monthly trading packs, which will be uploaded by PayPoint, ready for you to activate prior to the sell-out dates begin for that period.



#### Important

If you enable auto-updates, the mandatory promotions will be updated automatically overnight.

# Setting up Booker promotions

## Activate and deactivate promotions

- 1 Go to [my.paypoint.com](#) > EPoS > EPoS Promotion Maintenance
- 2 Select Booker from the Symbol Group drop down list (under the search bar)
- 3 To then display promotions for a specific period, you can search the results by Booker membership type e.g. Premier, Shop Locally/Club and Family Shopper

Promotions applicable for your region and any Multi Region deals will be automatically activated as they are deemed mandatory and highlighted in blue by Booker. For details of the promotion, click edit to view promotion info and associated products.

Selecting auto-updates for your promotions means that each applicable deal for your store and any multi-region deals will be set automatically in your back office for the promotional period.

**Activating individual promotions:** If you would like to select promotions manually each month, you can do this by scanning the deals from the Booker trading pack and activating individual deals. You can do this by referring to the Booker trading pack and searching for specific deal numbers e.g. D10 – tick the promotion (under Active) to set it live.

## Search promotions

Use the search box to look for promotions or promotions relating to products by barcode.

The symbol, fascia and region filters will bring up the corresponding subset of promotions. The non-current tick box will show you all future and past promotions.

## How to place an order for delivery using the PayPoint One app

In addition to placing orders through the Booker portal, you can also use the PayPoint One mobile app for convenience when you're on the move:

- 1 In the app, go to the Order menu
- 2 Select Orders for delivery
- 3 Select Booker as a supplier from the drop-down options. **You must ensure this step is completed before adding items to the order**
- 4 Press next (>)
- 5 A prompt will display asking if you would like a suggested order: **YES** = suggested list, **NO** = build your own pick list

**YES:** Suggested orders will only populate products that are associated as the active supplier for this order. The list is based on replenishing product levels up to the specified Minimum Stock Level set against each product. **NO:** To create a manual pick list order, scan the barcodes of the products you wish to have delivered from Booker. If you have scanned a barcode that does not have Booker set as the active supplier, you will be asked if you want to accept Booker as the active supplier from this order onwards. You will also be warned if you are trying to add a product which is not supplied by Booker and will not be allowed to add these products to the list

- 6 Once you have completed the list of products you want to order, press the save button. For speed of use, you can then confirm the list to be passed directly to Booker by pressing the chequered flag. If an order is no longer required or needs amending, it can only be done before the chequered flag has been committed (Press back to amend the order) (<)

## How to book in an electronic delivery note

- 1 On the PayPoint One mobile app, go to the Inventory menu
- 2 Select Deliveries
- 3 From the list, select an outstanding Booker delivery to receive the order
- 4 Press next (>). You will be presented with a list of products. Check the quantities of the delivery for missing items, substitutes and adjustments to the delivered quantities

## How to book in an electronic delivery note

Press save button followed by chequered flag to confirm and book the products into your stock.

For your orders placed into Booker, you will need to book an Electronic Note of Delivery (ENOD) via the mobile app. Booker normally issues this once the goods have been despatched.

**Important**  
You must accept the delivery for your product stock levels to be updated.

## Order history

The Order History shows you details of your Booker orders and the stages through to delivery. This will include, orders placed by the Booker portal and cash and carry at your local depot.

- 1 Go to [my.paypoint.com](https://my.paypoint.com) > EPoS > EPoS Stock > Order History
- 2 Select Group by: Suppliers and click Booker from the results
- 3 The default date range is today, select a data range to view order placed within it

You can check whether the ENOD has been received by matching the order reference with the Booker invoice number. If the order has been updated i.e. substitutes or a change in the ordered quantity, an update icon will be shown against the order.

**Top tips**

1. Ordering, price updates and ENODs will end on your old EPoS system once you activate your PayPoint One link to Booker. You will still be able to place orders via the Booker portal
2. Set a retail selling price/RRP for the products you sell. The easiest way to do this is via the auto RRP function in the back office, via our PayPoint One app at the shelf edge or alternatively you can set the price as you scan items on the PayPoint One mobile app
- Important: Prices will not automatically be setup for Booker products if you do not use RRP's. It is your responsibility to set your prices for the products you have in your store.**
3. Set Booker as your active supplier for the products you will be buying. You can do this as you add items into an order via the mobile app, via a range adjustment or by selecting Auto-RRP
4. Set the minimum stock level per product and do a go live stock count. This is a requirement to make full use of inventory and suggested orders
5. Once you receive a delivery from Booker, remember to book the delivery into stock by accepting it on the mobile app so that your stock count is updated
6. Orders you place outside of EPoS e.g. on the Booker web portal or depot walk-in, will also need to be booked into your store to update stock levels
7. Filter the promotions by using the search bar. For specific promotions, use the period number beginning with PXX e.g. P10, you can also filter by deal numbers in your monthly trading pack e.g. D01 to help find the correct promotions. Alternatively search by barcode for products in a promotion. You can also enable your Mandatory Promotions to be activated automatically in the subscription – you still need to activate your 'Optionals'

If you choose not to automatically activate your mandatory promotions, activating all promotions will set all mandatory and optional promotions live for all regions and Booker shop fascias

# 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).

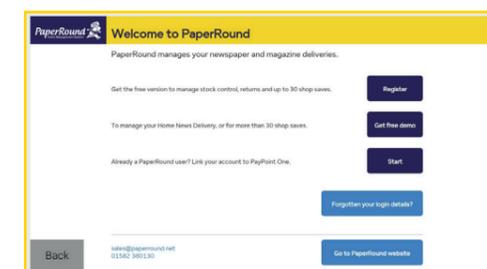
## Benefits of FREE Counter News EPoS Core/Pro

- 1 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)
- 2 Benefits of FREE Counter News
- 3 Manage up to 30 customer accounts, including adding holidays and voucher payments
- 4 Automatic daily product and price file update overnight
- 5 Automatic electronic delivery note receipts from Smiths News or Menzies
- 6 Easily manage returns for newspapers and magazines
- 7 Print debtors reports and statements to see outstanding balances owed by customers
- 8 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

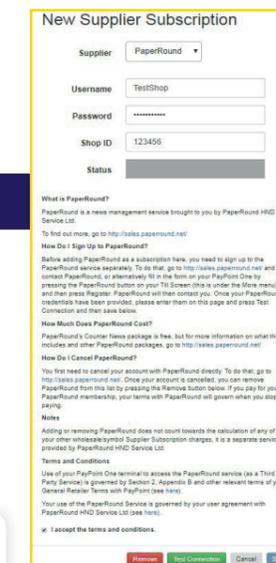


Once you have received your login credentials you can login and get started straight away. PaperRound will also send you a training guide so you know how to use the service.

## 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](https://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**



**Important**  
You need a Smiths News or Menzies account to activate your PaperRound news management deliveries and returns. PaperRound will send you a training guide directly.



[my.paypoint.com](https://my.paypoint.com)