POYNT

Outline

01 **Making an Order**

Making an order in the register app:

After creating a Product Catalog, merchants can see and use their catalogs in the Register app. From Register app, merchants can utilize these catalogs to add items to orders, charge their customers, and provide item details on receipts.

Step 1: Enter the register app from the home screen.
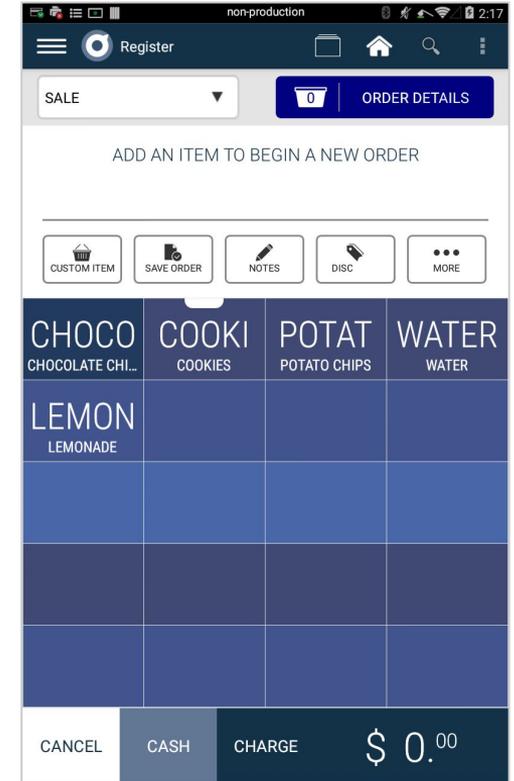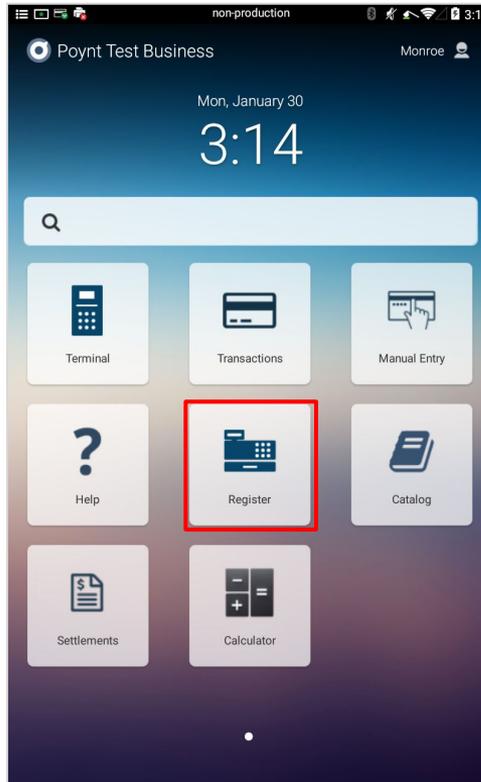
Step 2: Use your catalog to choose which products to add to the open order. Example: Tapping LEMON 1x will add one Lemonade to the order.
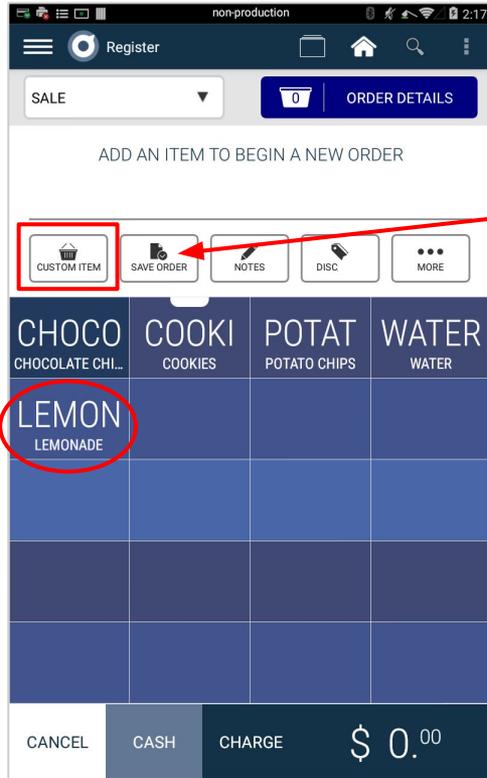
Note: In addition to the preset catalog items, merchants can also create custom items from the register menu to add to their order. To make a custom item, select the custom item button in red on the left and then simply enter the name and price.
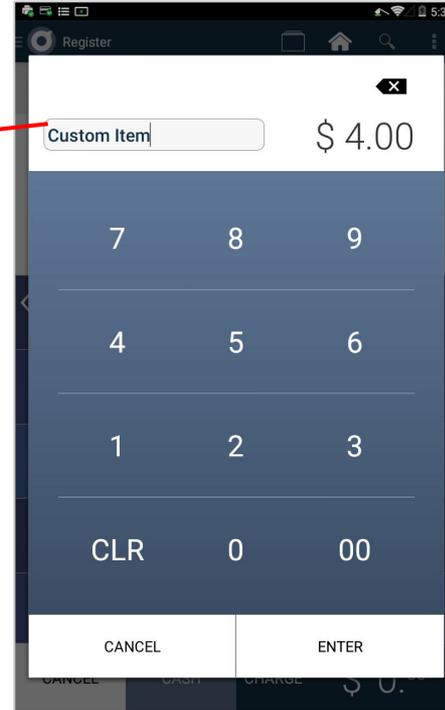
Step 3: When selecting items, they will show up in the menu above the catalog with a couple other options.
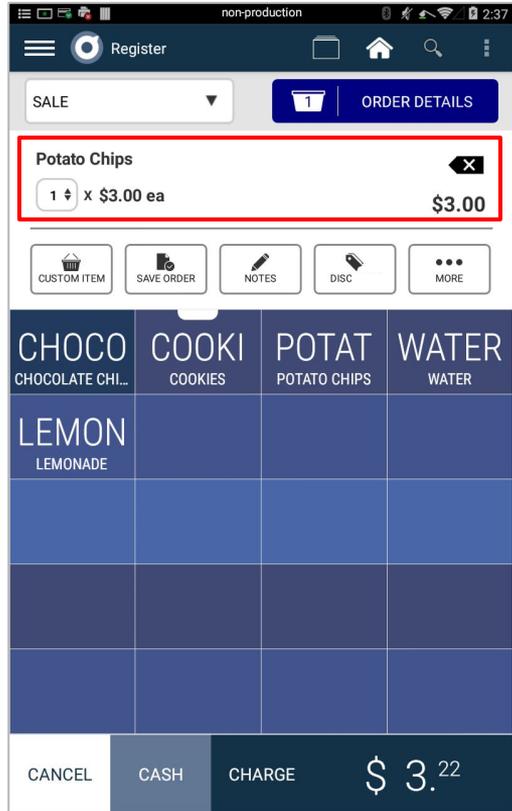
Note: Change the quantity of the selected item here.

Note: Delete the product from the order here.
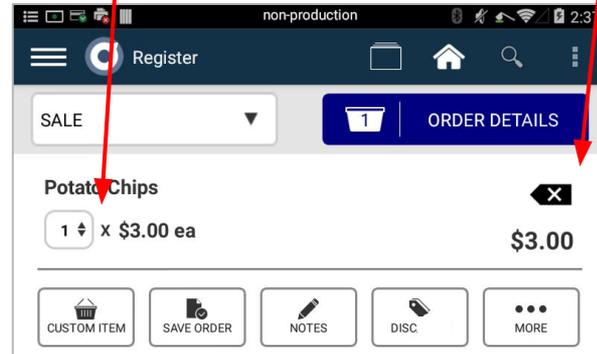
Step 4: Some of the products selected are going to have modifiers. A popup screen will allow you to apply modifiers to the product. Example: "Avocado"

Step 5: Select modifiers by checking the boxes, then select "APPLY". The item will now be added to your order with the chosen modifiers.

*Note: The "RESET ADD-ONS" button in the top right removes all selected modifiers from the product.*
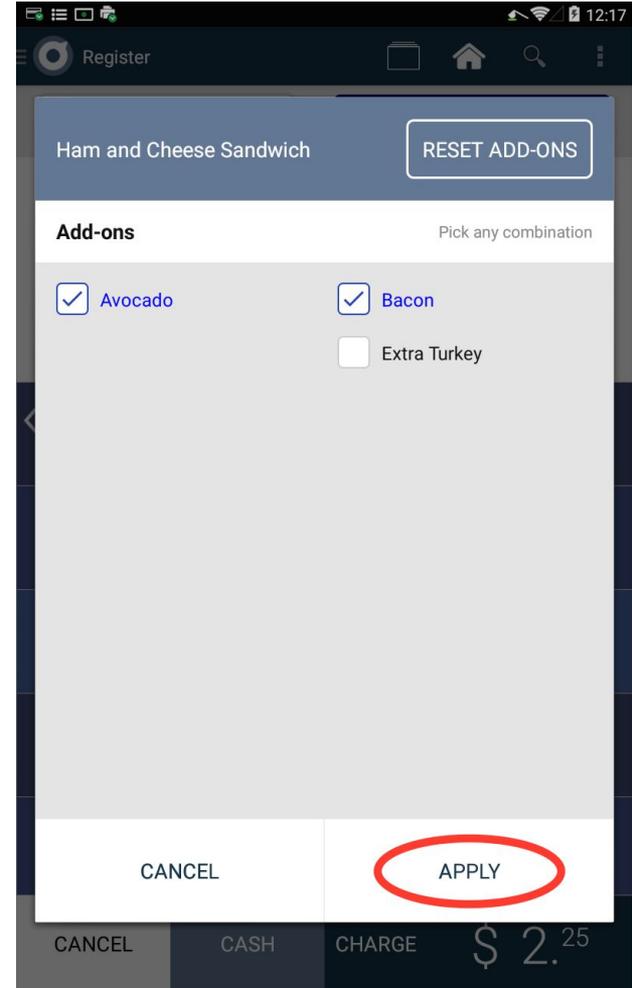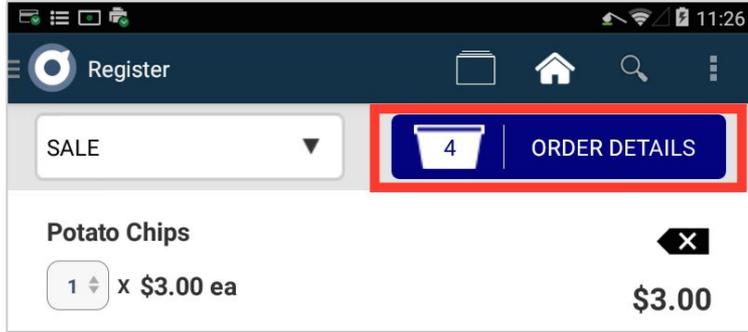
Step 6: When you have finished selecting all the products in an order, you can view the entire order by clicking "ORDER DETAILS". From this menu, shown on the right, you can edit individual items and the entire order.

Note: Add notes or discounts to individual products here

Note: Change the quantity of the selected item here
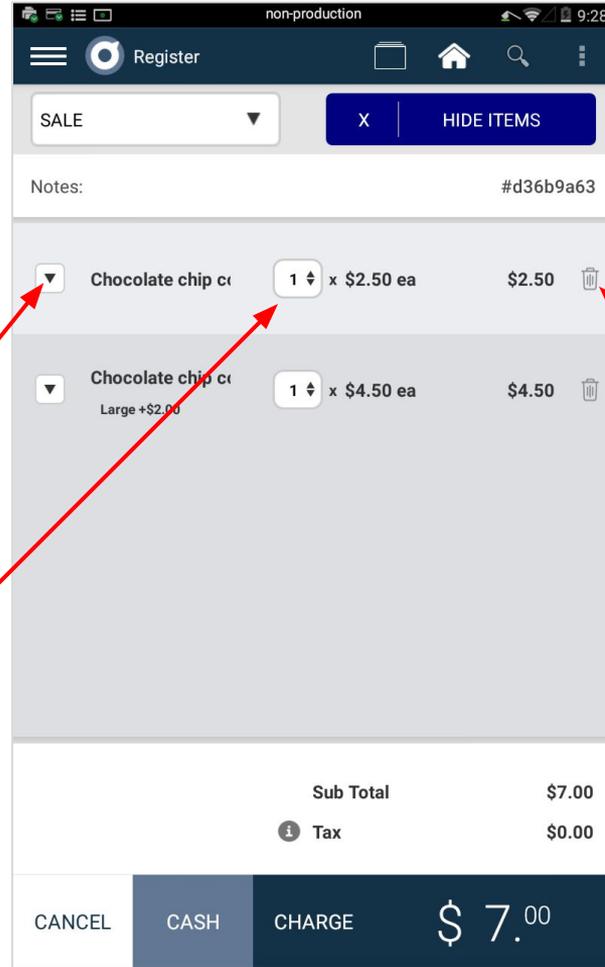
*Note: Delete an item from the order here*

Step 7: You can also save entire orders and revisit them later by clicking the "SAVE ORDER" button.

Step 8: At any time using the register app, you can begin the payment process by clicking "CHARGE" or "CASH". "CHARGE" begins the transaction via credit card, and "CASH" with cash.

Step 9: To cancel an order at any time, select the "CANCEL" option in the bottom left.
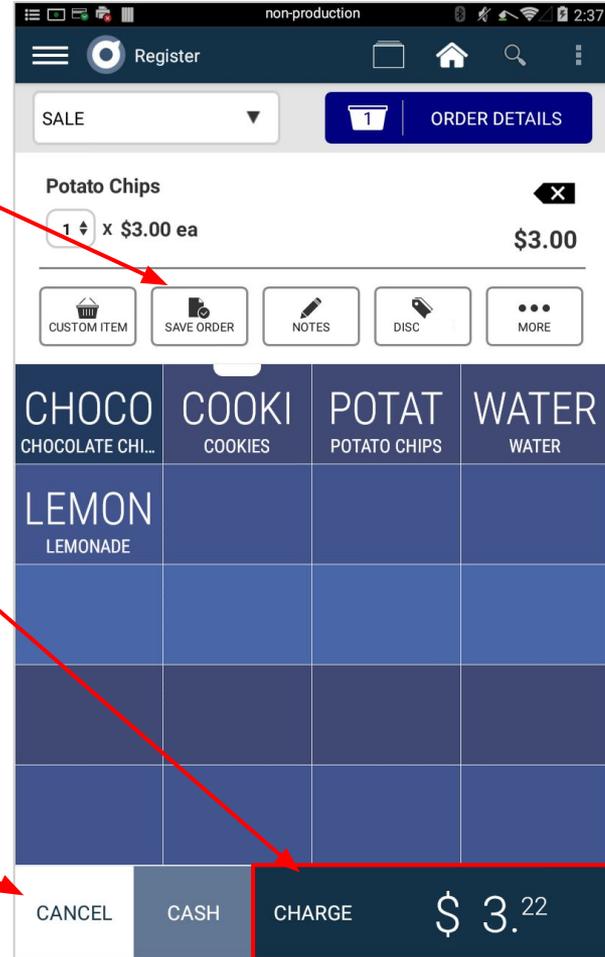
Step 10: After saving an order, you can return to that order by going to order list menu.
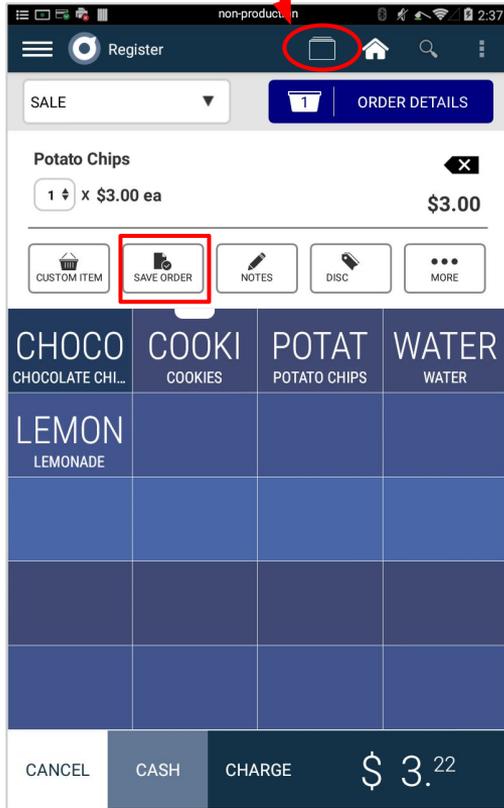
Select an order to reopen by clicking on it
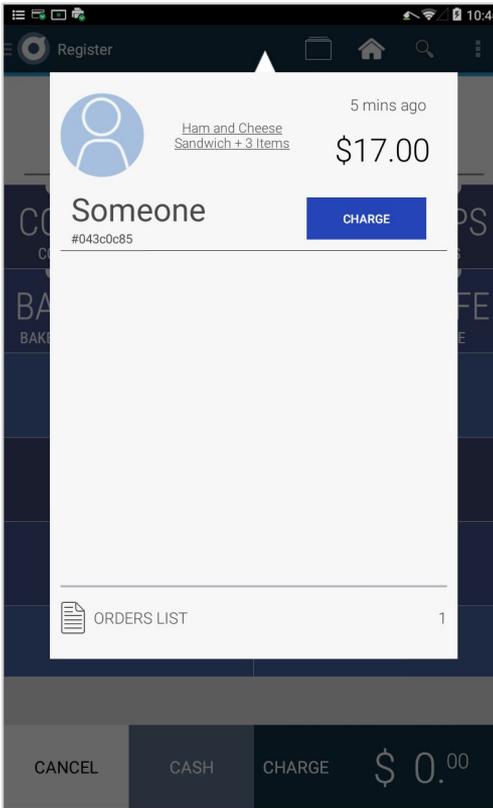
Cancel, edit, or begin the payment process for the order.
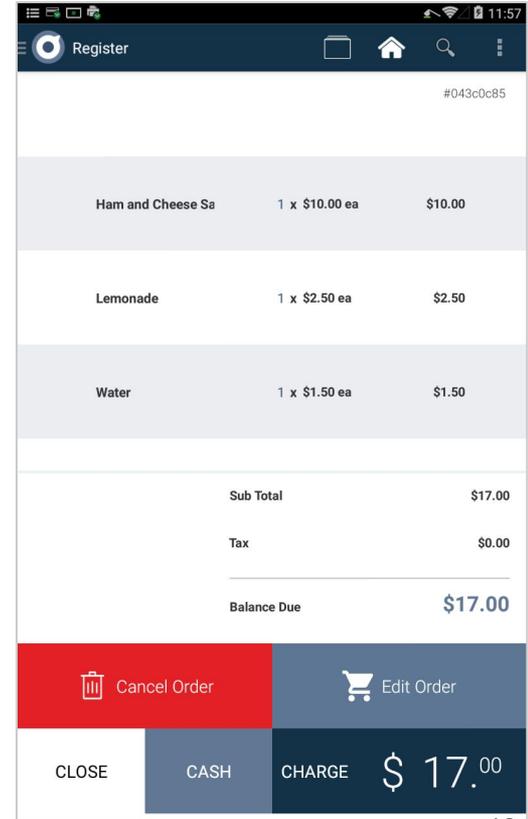
02 **Editing Order Details**

Editing Order Details:

Select the Order Detail button to view and edit the items selected.
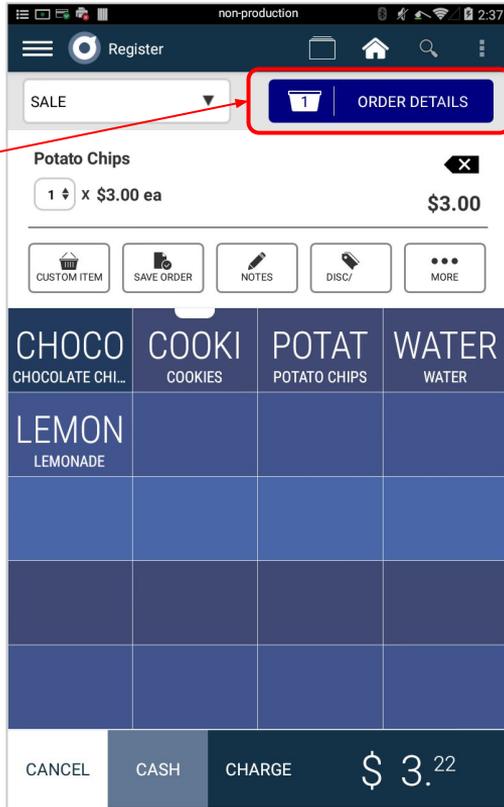
Use the dropdown to edit modifiers, discounts, fees, notes, and enable or disable item-level taxes.
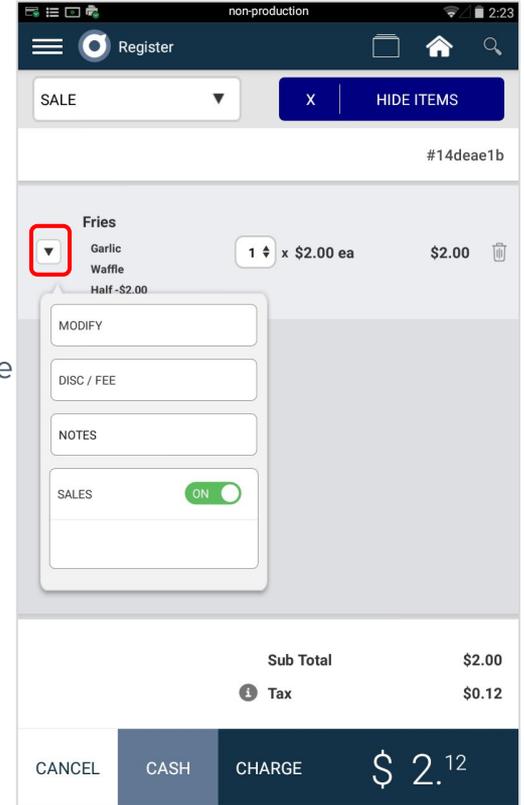
Adding discounts and fees:

After creating an order through the register app, merchants have the option to apply order-level and item-level discounts and fees.
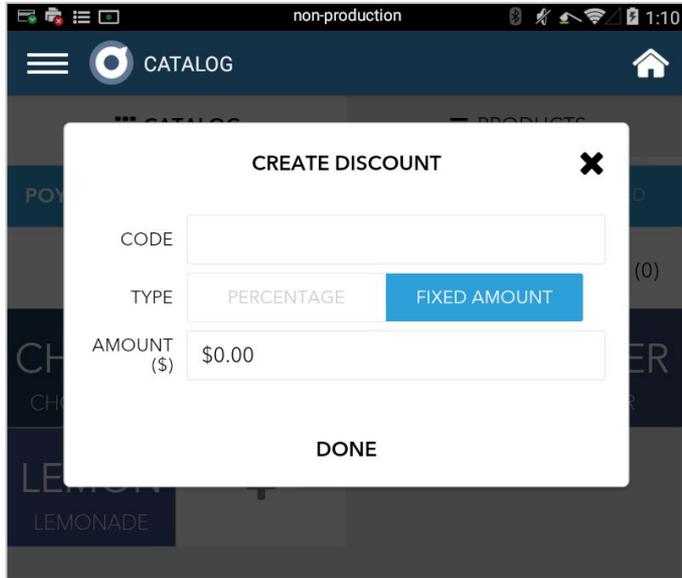
Step 1: To create an order-level discount, select the "DISC/FEE" button from the main register menu.
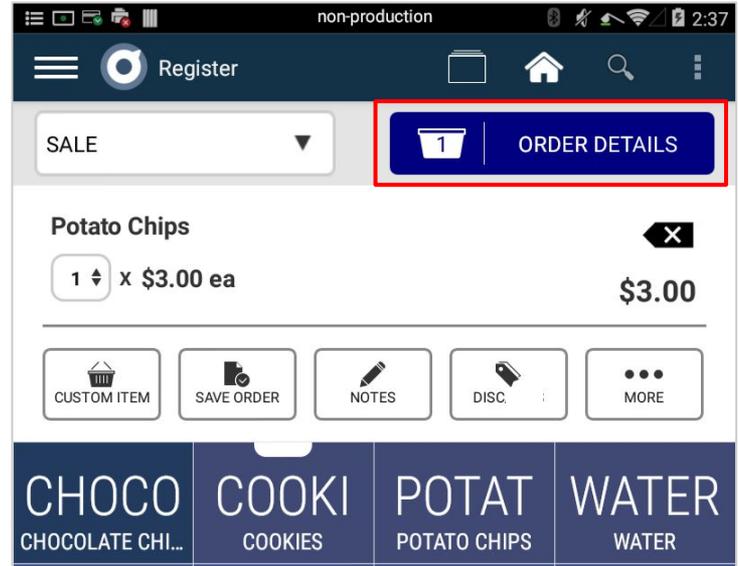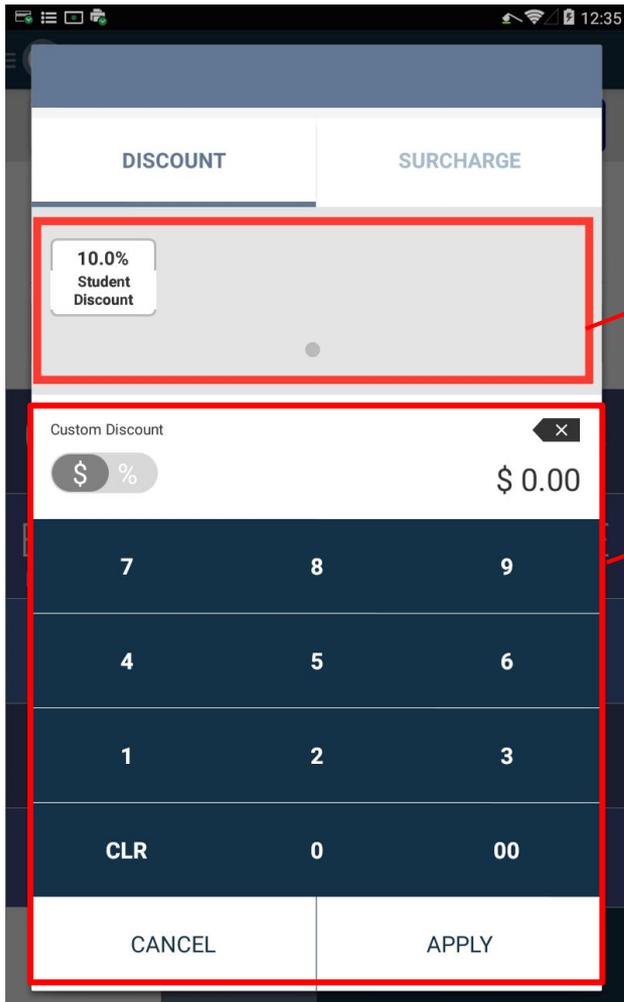
Step 2: Find and apply your already created discounts here.

OR

Create a custom discount using the lower half of the screen. To do this, first toggle either a percentage discount or dollar discount. Then, simply enter the percent or amount desired and click "APPLY".

Step 3: When you are finished applying your discounts, select the "APPLY" button at the bottom of the screen

Step 1: To apply individual product discounts, go to the "ORDER DETAILS" menu. There, select the drop down arrow.
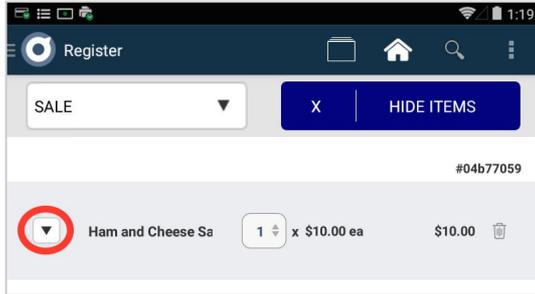
Step 2: Select "DISC/FEE". This will take you to the same menu seen on the previous page offering custom or preset discounts and fees.
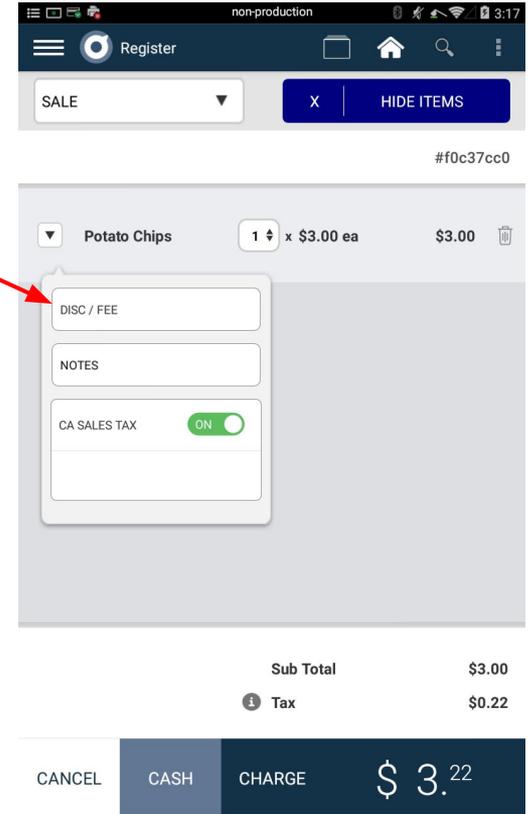
Step 3: Choose a preset or custom discount from this menu and click apply.

Once your individual discount has been applied, it will show up in red below the product in the order details menu.
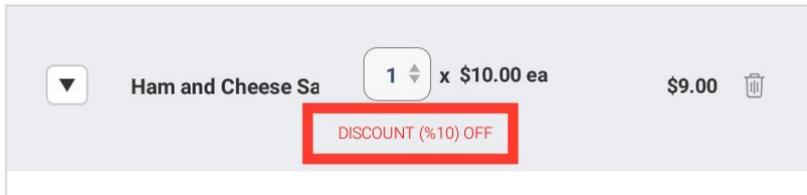
Custom Notes:

Through the register app, merchants can add notes to both individual products and entire orders.

Step 1: To add a note to an **order**, select the "NOTES" option.
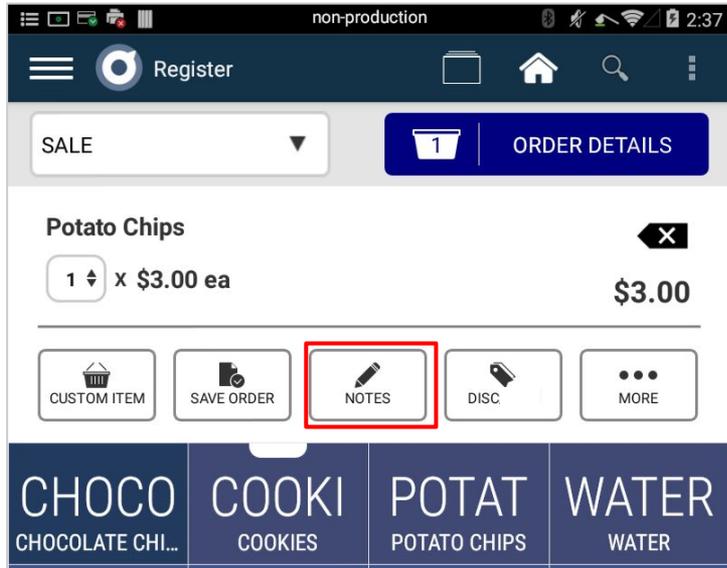
Step 2: Simply type in your note and hit "OK".
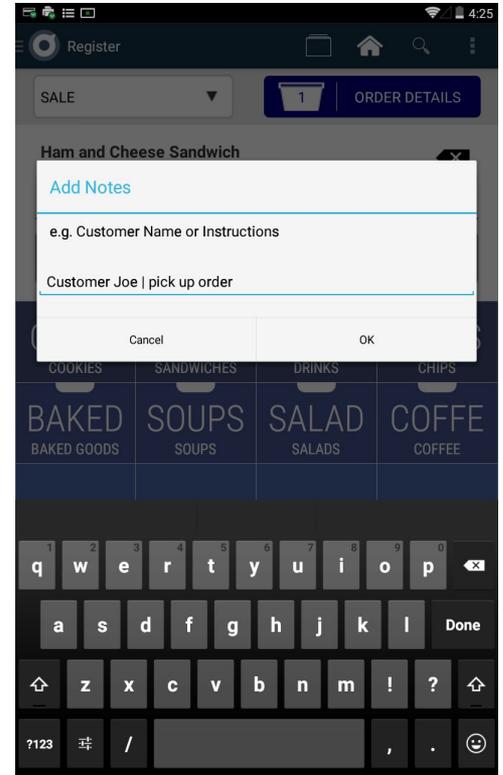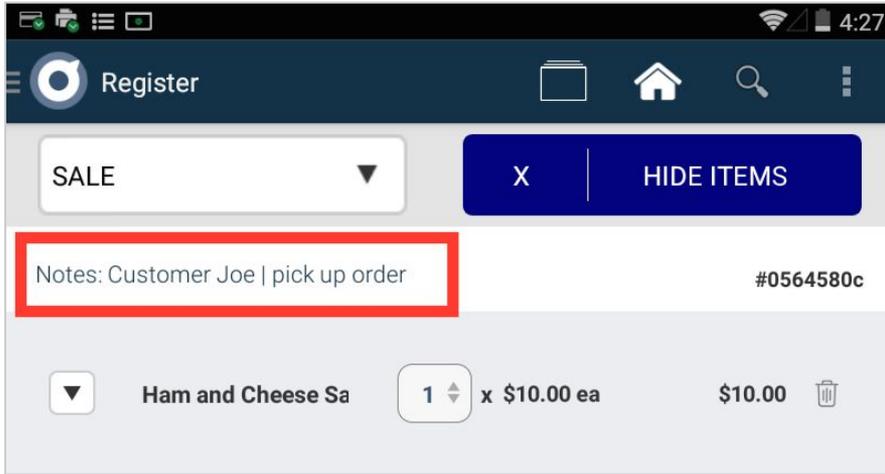
Step 3: View your note in the "ORDER DETAILS" menu

Note: You can continually edit your order notes by going back to the "NOTES" option in the catalog menu

Step 1: To make notes on **individual items**, visit the "ORDER DETAILS" menu.

Step 2: From here, click the drop down button on the left side of the item name
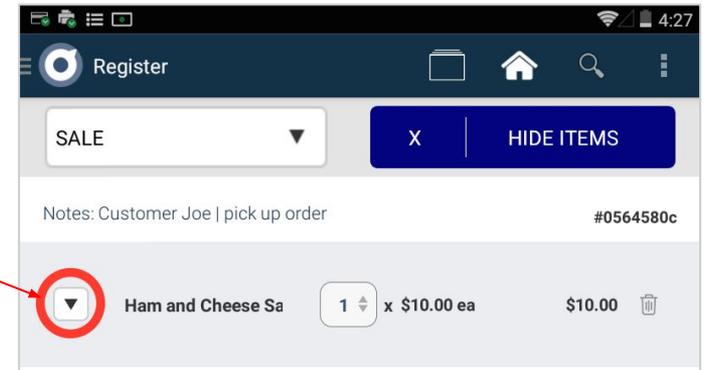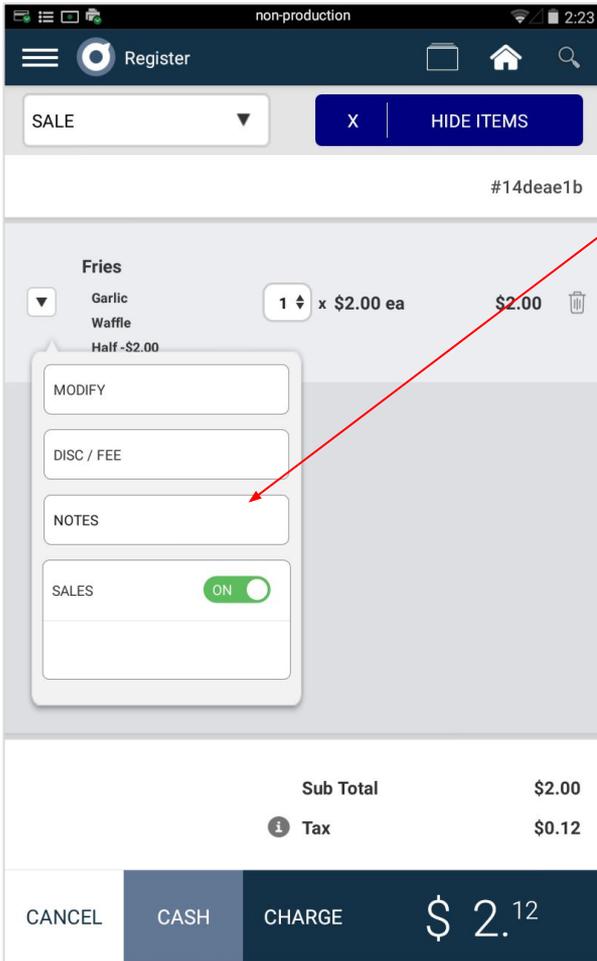
Step 3: Select the notes option that pops up.

Step 4: Type in the note for that specific product and click "OK".
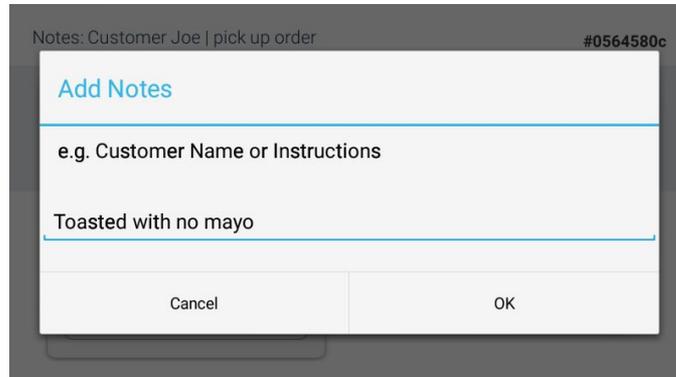
Note: Individual product notes do not show up on customer receipts, but they show up on both the item and order receipts.

Adding taxes to an item:

Merchants can enable or disable taxes for each item in the Order Details view. Simply toggle and instantaneously see the Charge amount reflect those changes.
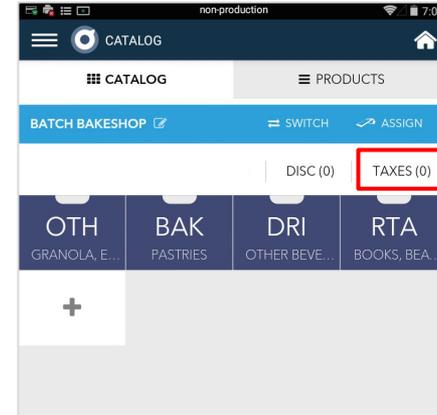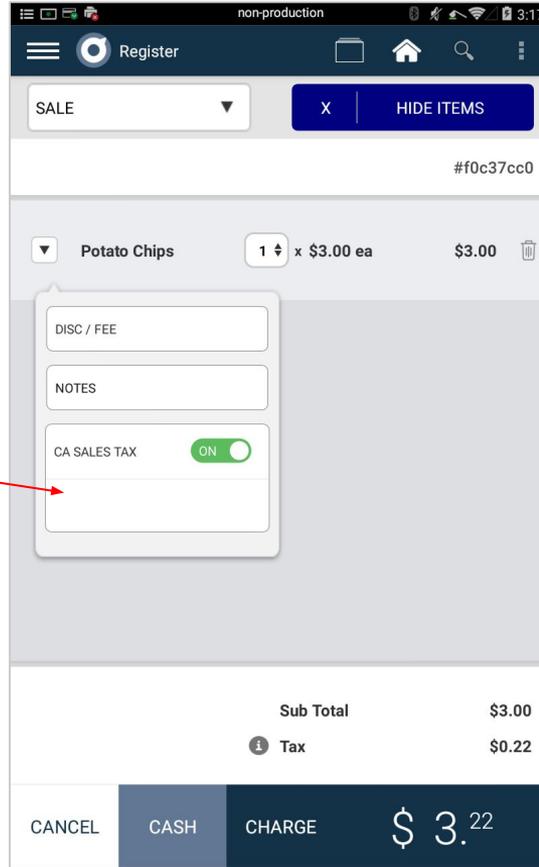
Create these tax settings by selecting Taxes > Add Tax in the catalog app.

03 **Using UPC and Barcode Scanner**

Utilizing barcodes in the register app:

After adding UPC's to products within the catalog, merchants can scan the barcodes on their items to add them to their order.
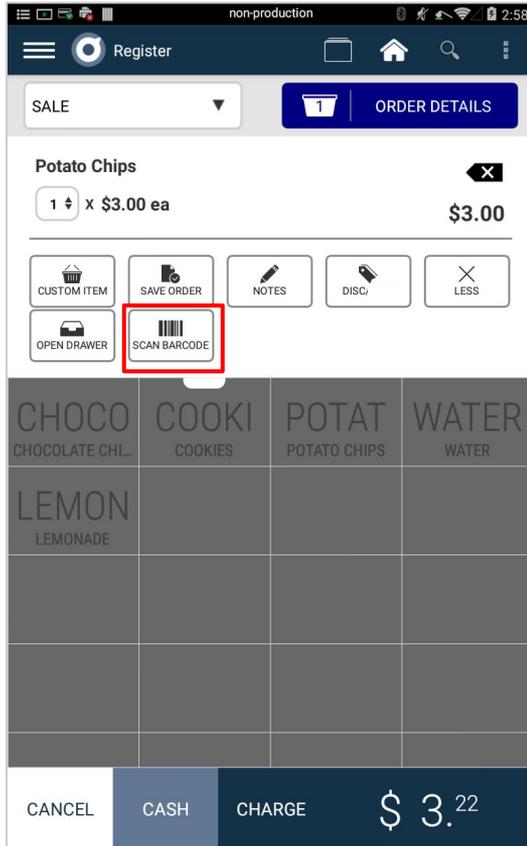
Step 1: Within the Register app, select the "SCAN BARCODE" option to use the built-in barcode scanner. You may have to click the "MORE" for this selection to pop up.

Note: The barcode scanner on the device will not work properly unless you have entered the correct UPC's for each product via the catalog menu.
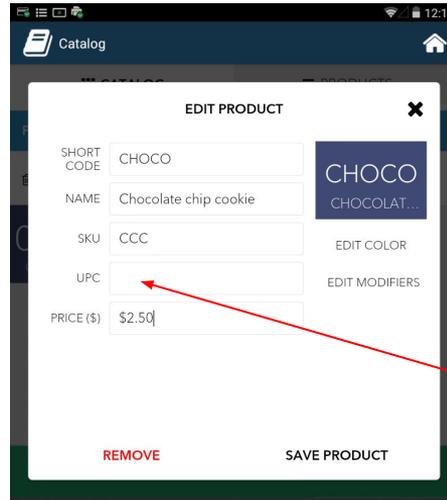
Example of UPC:
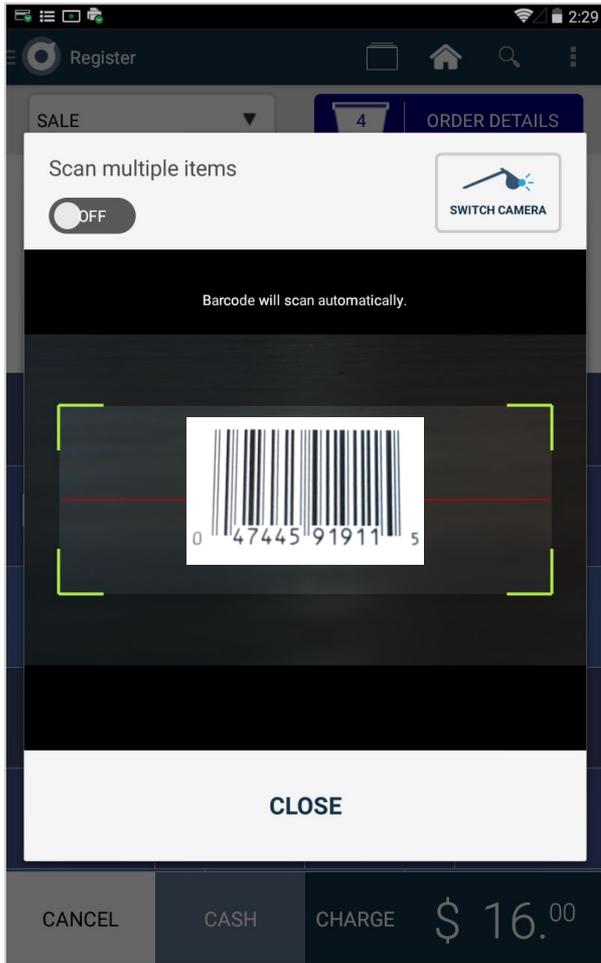
Step 2: A window will pop up where merchants have several options for scanning their products.

- **Scan multiple items:** To scan more than one item at a time and keep the barcode scanner running, toggle this option to 'ON' in left hand corner. Select 'CLOSE' when finished scanning the last item.

- **Switch camera:** To switch between the customer and merchant facing cameras, click the "SWITCH CAMERA" option.
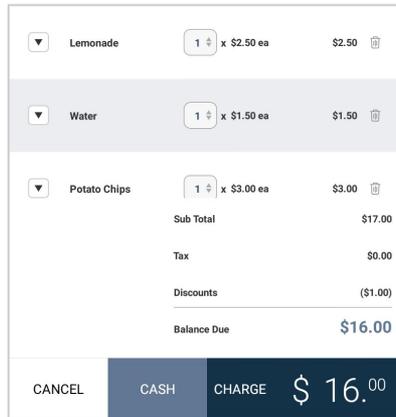
Note: After scanning, the item will appear in the orders list.

04 **Executing a Transaction**

Executing a transaction from the Register app:

After creating an order on the Register app, the merchant can charge the customer directly from the app and make a transaction.

Note: The Poynt Smart Terminal can accept many different forms of payment. When a customer elects to pay with cash, select the "CASH" option at the bottom of the register app to begin the payment process. For all other types of transactions, use the "CHARGE" button.
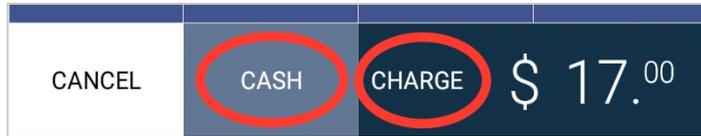
Step 1: For **cash payments**, the merchant must first choose the "CASH" button.

Step 2: After that, enter the amount of money received and click "COMPLETE".

Step 3: Last, select "DONE" and the cash transaction will be complete.

24
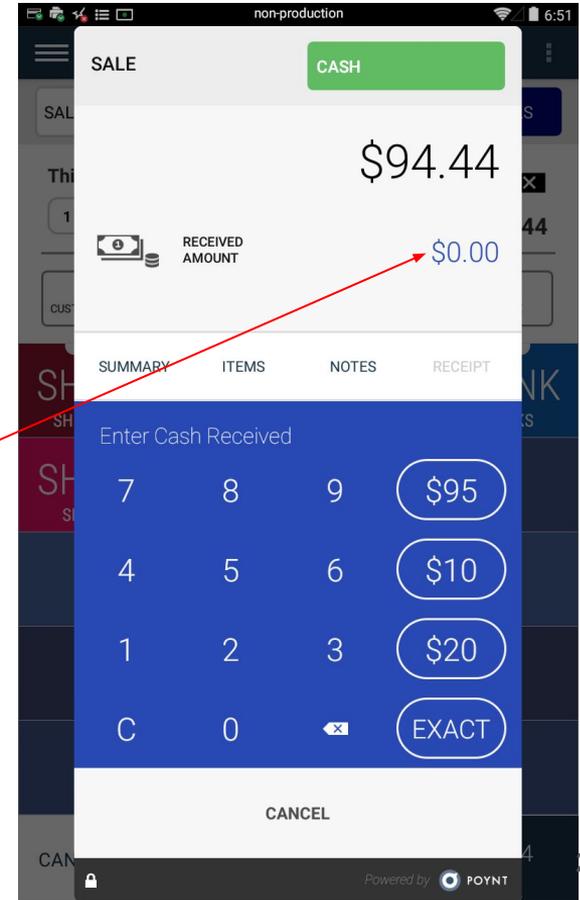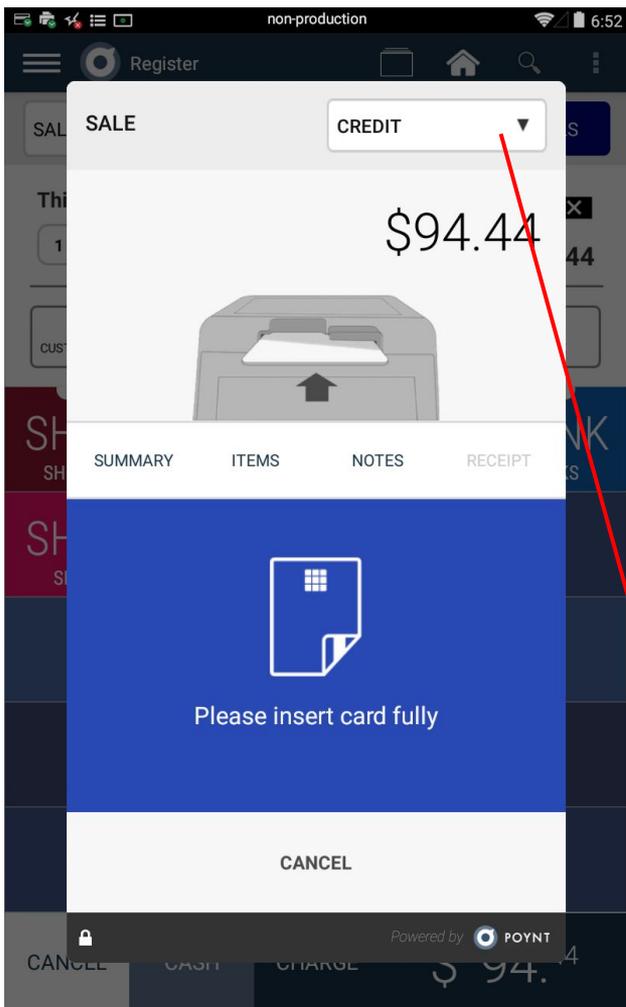
Step 1: For **non-cash payments**, click the "CHARGE" button. You will then be prompted to insert a credit card as seen on the left.

Step 2: If the customer chooses to pay with a card, insert the card and wait for the payment to authorize.

Upon authorization, the customer will be prompted to enter a tip amount (if applicable), signature, and receipt selection. After that, the transaction will be complete.

Waiting for Tip → Waiting for Signature → Waiting for Receipt

Step 3: If the customer chooses not to pay with a credit card, select the right-side drop-down menu for other payment options.
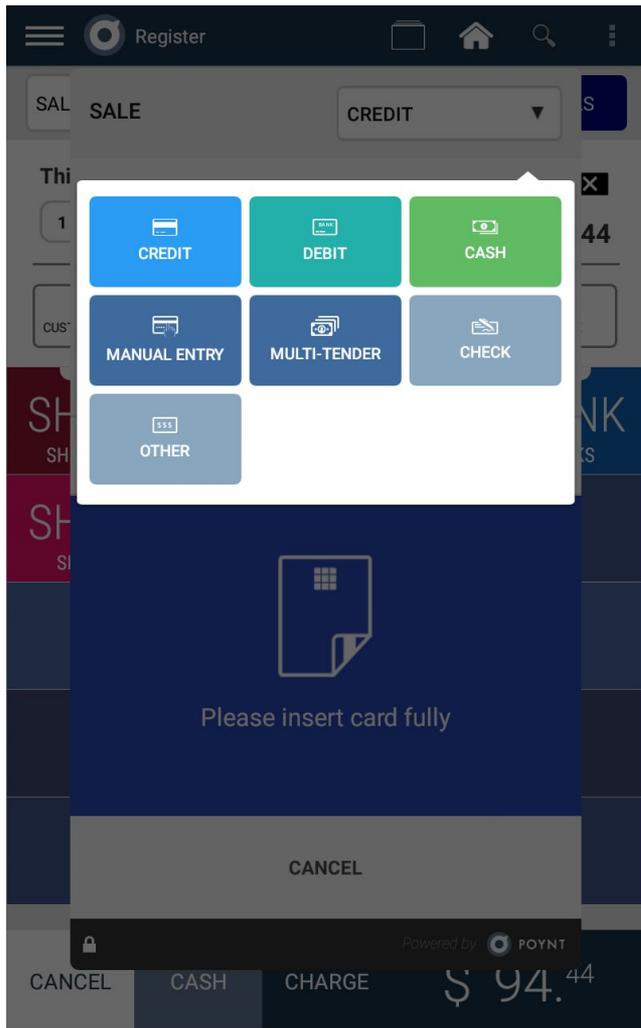
Clicking the dropdown will open a menu with different forms of payment options:

Debit: Allows customer to pay with Debit card.

Cash: Takes you back to the cash payment screen.

Manual Entry: Allows you to manually enter a credit card to make the purchase.

Multi Tender: Splits the order into portions, and lets customers pay in multiple forms. Example: half-cash half-credit payments.

Check: Customer can pay via check.

Other: Allows any other type of payments. Example: gift certificate or store voucher.

05 **Customer screen and receipts**

The customer-facing screen in the Register app

The Poynt terminal is an dynamic payment device that empowers customers through its interactive features.

Note: The customer can view the itemized order information as the merchant adds it to the order.

Step 1: Once the merchant has clicked "CHARGE", the customer screen asks for a card.

TOTAL $17.00

1x Potato Chips $3.00

1x Water $1.50

1x Lemonade $2.50

4 ITEMS

Insert or Tap Card $17.00
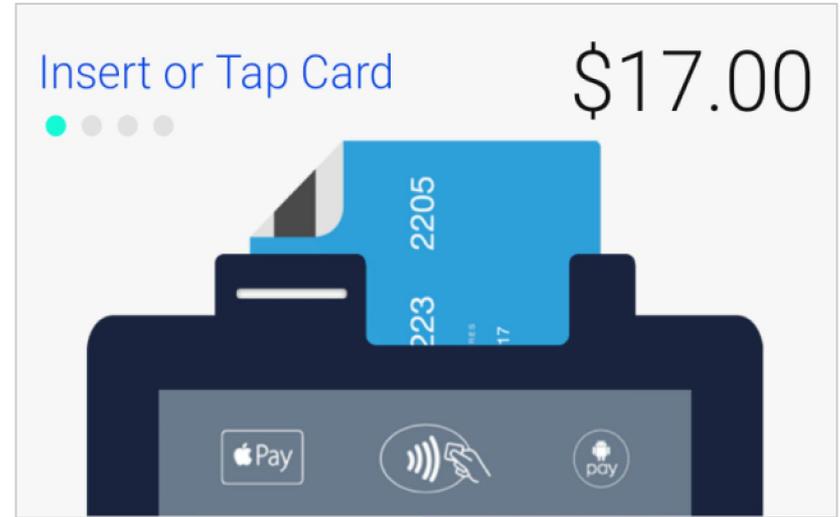
Step 2: This is the transaction flow by screen from the customer point of view.

Select TIP — $10.00

| 15% ($1.50) | 18% ($1.80) | 20% ($2.00) |

NO TIP   CUSTOM

Please Sign — $10.00

✕

I agree to pay the transaction amount in accordance with my card agreement.Card ending in 0119

CLEAR   DONE

Choose Receipt — $10.00

Please remove your card.

NO RECEIPT   PAPER RECEIPT

EMAIL   SEND TEXT

*Text messaging rates may apply based on your plan with your mobile phone carrier.

Note: *At the end of the purchase, customers have the option to get a paper or digital receipt. Below is an example of an email receipt.*

POYNT STORE 1

Feb 6th, 2017 @ 2:50 pm	Order ID: 14f82968
	Order Number: 2

Merchant ID: 012345678912
Terminal ID: 7e2f

ITEM (1)	AMOUNT
Fries	$2.00
– Garlic ($0.00) x1	
– Waffle ($0.00) x1	
– Half (-$2.00) x1	
SUBTOTAL	$2.00
TAX	$0.12
TOTAL	**$2.12**

Step 1: Merchants also have the option to print their receipts by opening this menu in the upper right hand corner.
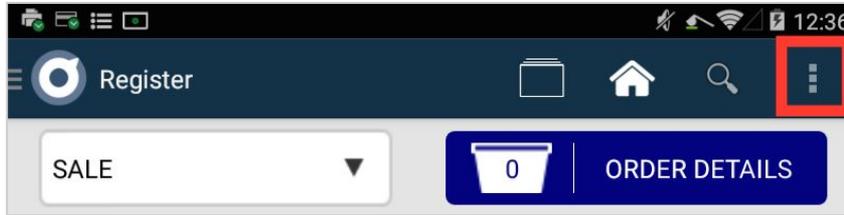
**Step 2:** Next, select one of the options from the drop down menu and your receipt will print.
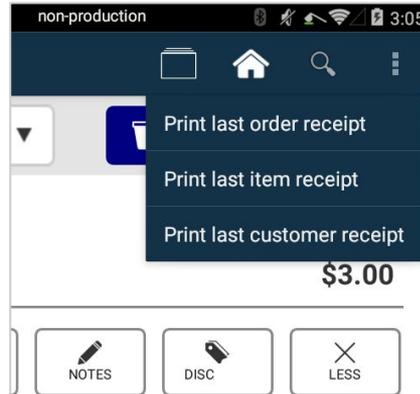
- ***Reprint Last Order Receipt –*** *contains order item details*

- ***Reprint Last Item Receipt(s) –*** *will print all items in the Order as separate receipts (intended for kitchen/counter external printers)*

- ***Reprint Last Customer Receipt –*** *contains order item details and includes payment detail information from customer*

07 **Other info**

Left menu options:
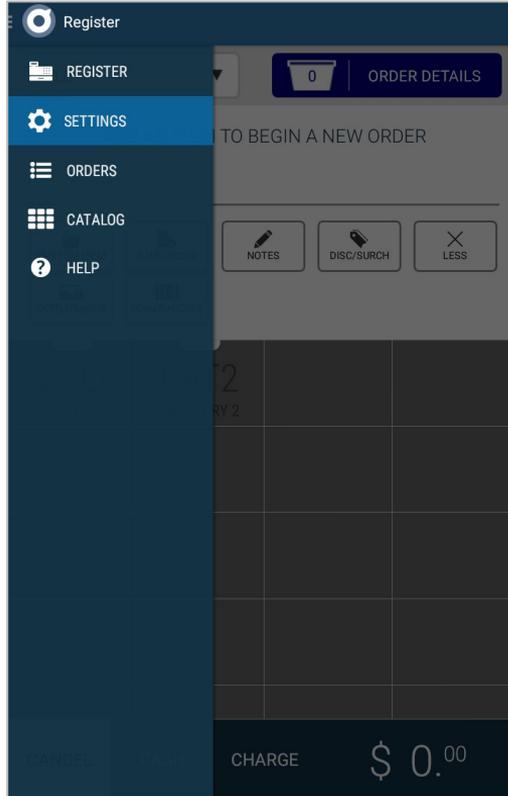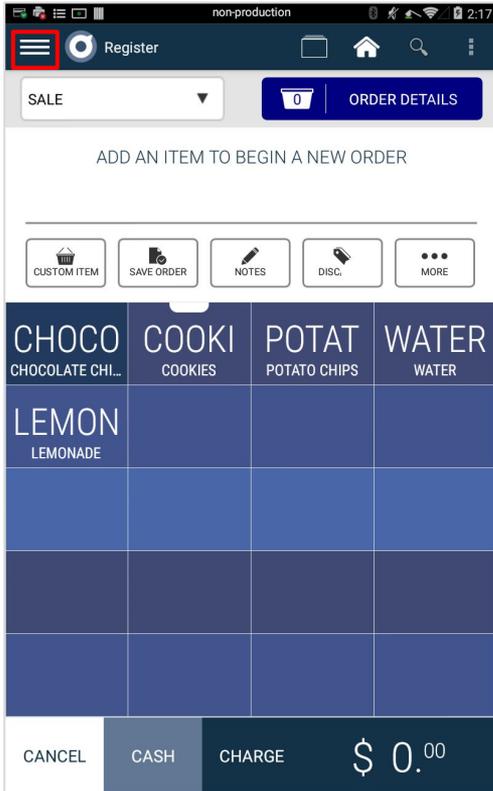
Register: The basic register app where catalogs can be used to create live orders.

Settings: Includes additional options such as: Refresh Register, Printer Settings, Customizing Menu, etc.

Orders: A list of all the orders that have taken place and their status, cost, and time.

Catalog: Takes you directly to the catalog app where you can edit your catalog for use in the register app.

Help: Takes you to the help app with FAQ's, explanations, and general support for your Poynt terminal.

Settings:
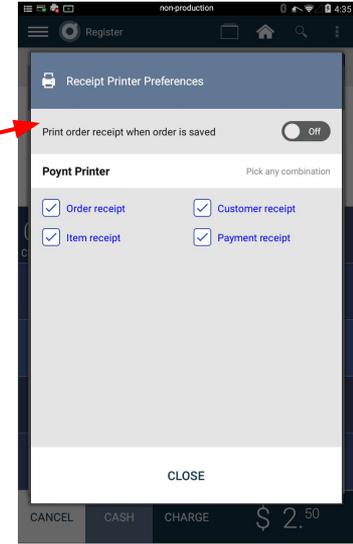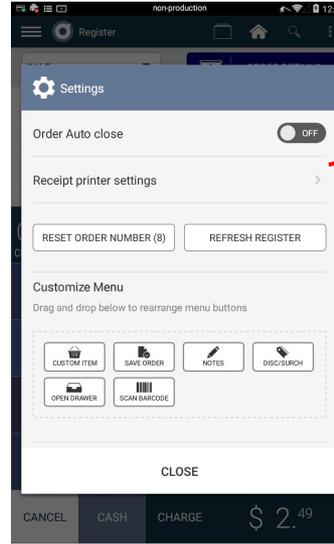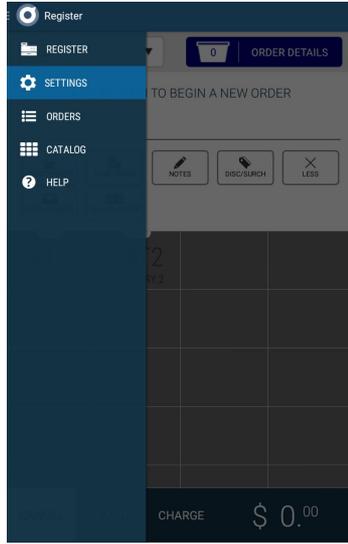
Order auto close: ON = After transaction is captured the order is closed; OFF = After transaction is captured, the order is left open - for sending to kitchen display (3rd party app).

Receipt printer settings: You can choose what type of receipt gets sent to which printer, as well as create different combinations.

Reset order: The order counter can be cleared to zero.

Refresh register: Data sync to register if updates are made to the catalog via catalog app or web catalog.

Customize menu: Allows you to rearrange the register top menu. To do so, press and hold one icon until it begins to shake, then reorder icons by dragging and dropping.