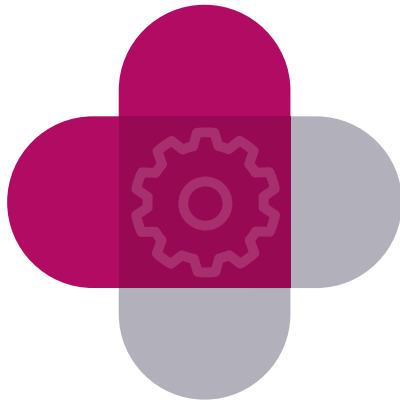




Merchant User Guide.



takepayments^{plus}

Get ready to do more...

 **takepayments**
we make it easy

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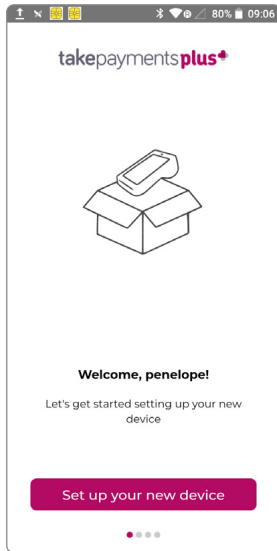
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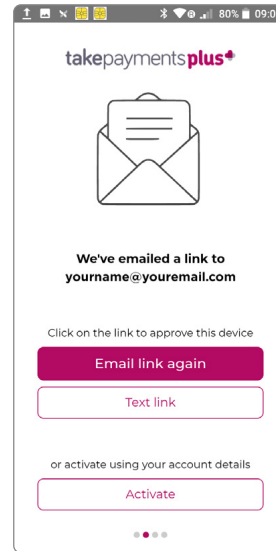
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Getting Started

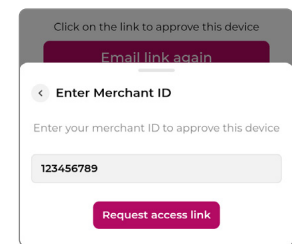
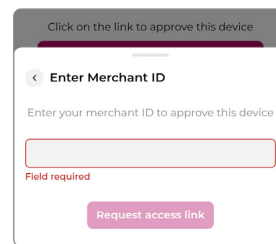
Activation

**1**

On the welcome screen, you will be presented with your business name. Tap “Set up your new device”.

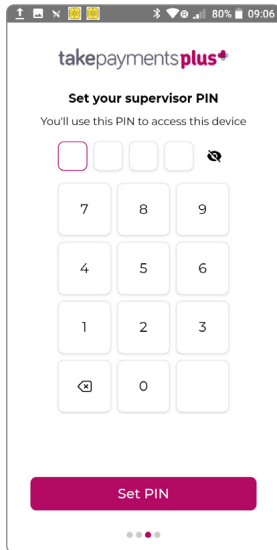
**2**

You now need to activate your device and will be automatically sent an activation link to your email. Locate the email and click the “Approve Device” button to activate your device.



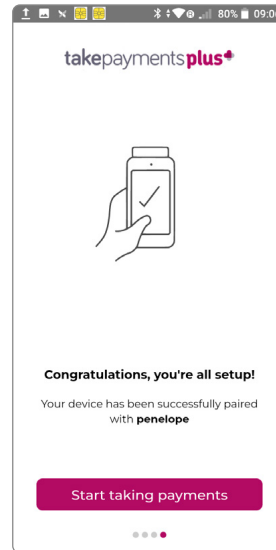
Alternatively, tap “Text link” to receive the activation link to the mobile number associated to your account, or tap “Enter merchant ID” to activate your **takepayments+** app using your acquiring merchant ID.

Activation (continued)



3

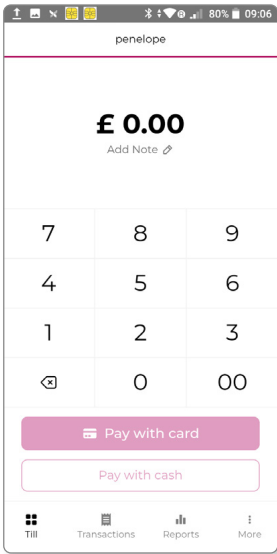
Next, enter a 4 digit supervisor PIN of your choosing, and tap “Set PIN”. Make sure to keep this safe as you will need the supervisor PIN for certain actions on **takepayments+**.



4

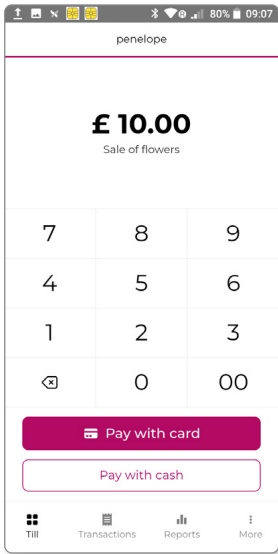
After a few seconds of activating, your device will confirm you are all setup and you can complete by pressing “Start taking payments”.

Taking a payment



1

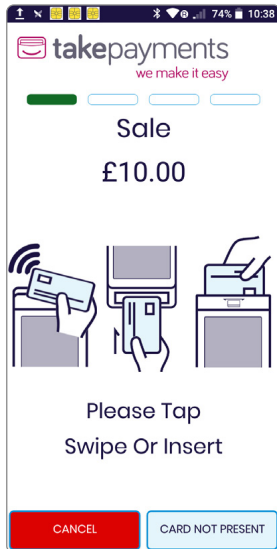
Enter the payment amount using the keypad onscreen.



2

Tap “Pay with card” or “Pay with cash” to navigate to the payment.

Completing by Card (Contactless)

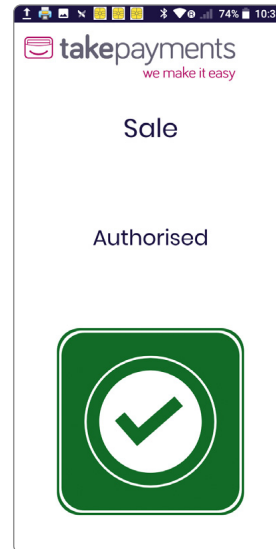


1

When prompted, ask the customer to present the card to the top edge of the terminal on the contactless logo.

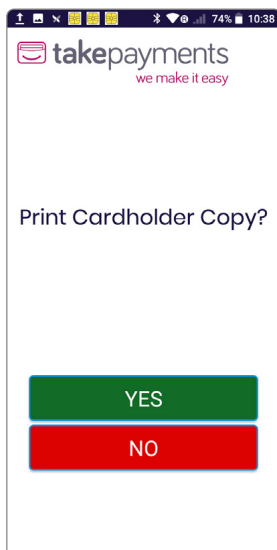
2

Once the screen displays “Card read” and beeps, the card can be removed.



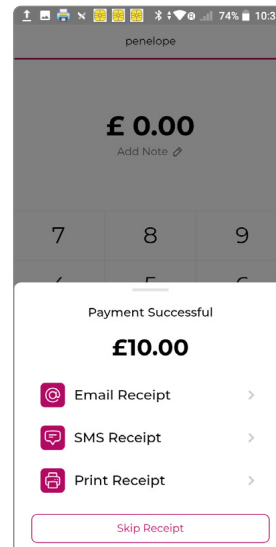
3

The transaction will take a few seconds to process and authorise.



4

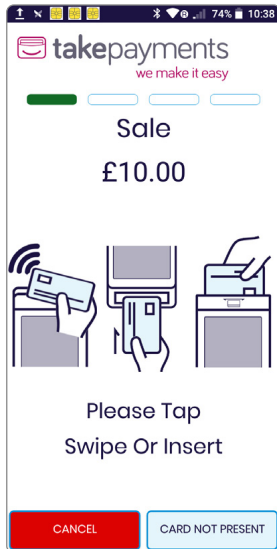
If card receipt printing is enabled in your **takepayments+** “More” settings, you will now be prompted with an option to print your cardholder and merchant receipts.



5

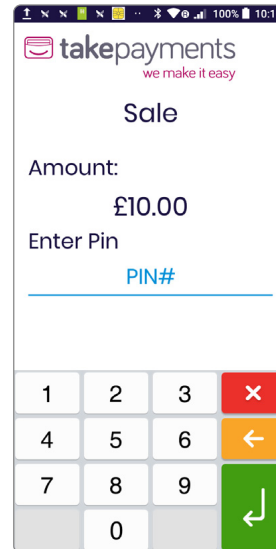
takepayments+ will now prompt with options to email, SMS, print, or skip the purchase receipt.

Completing by Card (Chip & PIN)



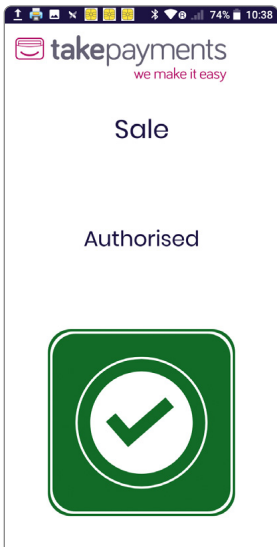
1

When prompted, ask the customer to insert the payment card.



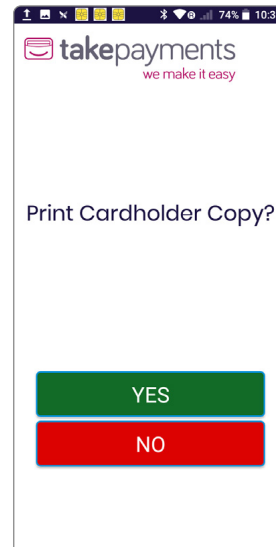
2

Ask the customer to enter the PIN followed by the green return key.



3

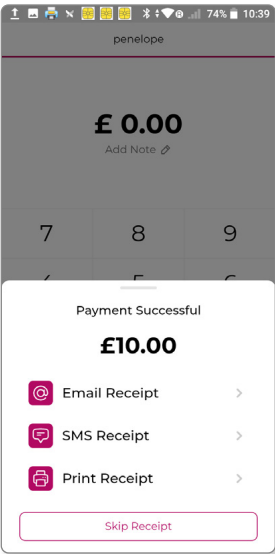
The transaction will take a few seconds to process and authorise.



4

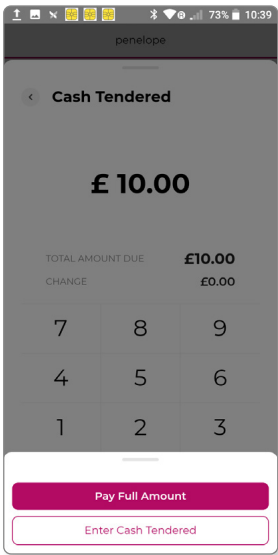
If card receipt printing is enabled in your **takepayments+** “More” settings, the terminal will print the cardholder copy. Tap “Yes” and the merchant copy will also print.

Completing by Card (Chip & PIN) continued



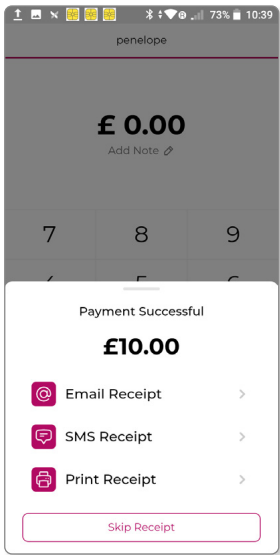
5 takepayments+ will now prompt with options to email, SMS, print, or skip the purchase receipt.

Completing by Cash (Full Amount)



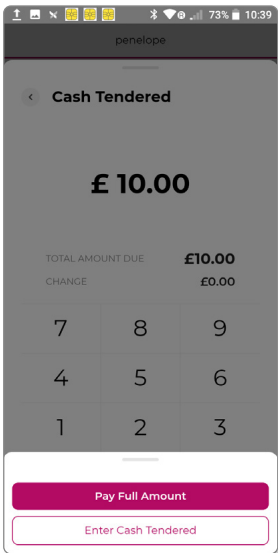
1 You will now be prompted to select “Pay Full Amount” or “Enter Cash Tendered”.

2 If the customer has paid the exact amount, tap “Pay Full Amount”.



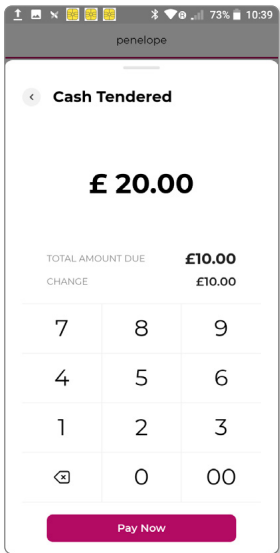
3 **takepayments+** will now prompt with options to email, SMS, print, or skip the purchase receipt.

Completing by Cash (Entering amount tendered)



1

You will now be prompted to select “Pay Full Amount” or “Enter Cash Tendered”.



2

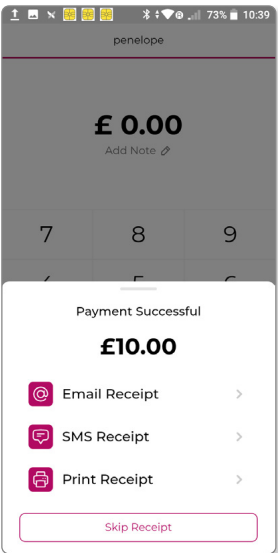
To enter the amount tendered (paid in cash) tap “Enter Cash Tendered”.

3

Use the keypad to enter the amount of cash paid. You will be prompted onscreen for the amount of change due.

4

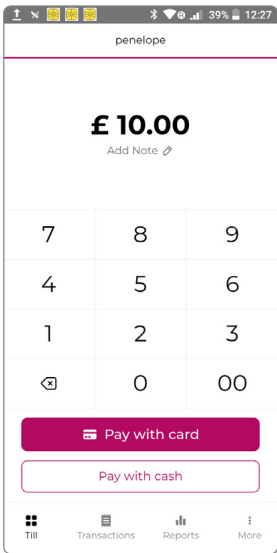
Tap “Pay Now”.



5

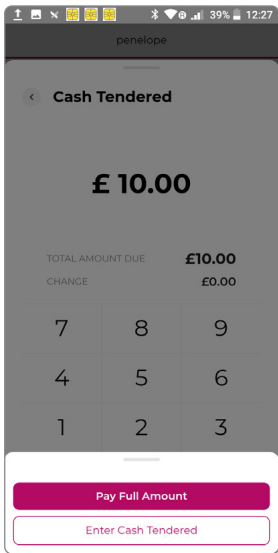
takepayments+ will now prompt with options to email, SMS, print, or skip the purchase receipt.

Completing a part Cash/Card payment



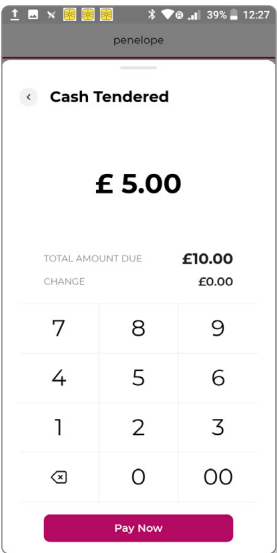
1

Enter the payment amount using the keypad onscreen.
Tap “Pay with cash”.



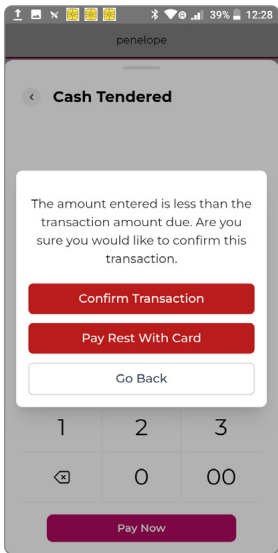
2

Tap “Enter Cash Tendered”.



3

Use the keypad to enter the amount of cash paid and tap “Pay Now”.



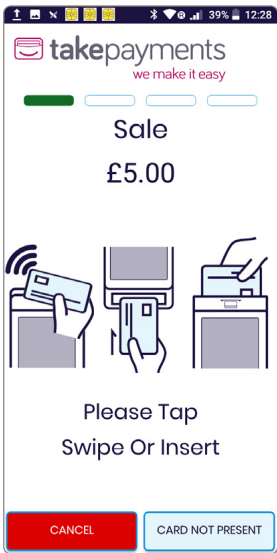
4

You will now be prompted that the amount entered is less than the transaction amount due.

5

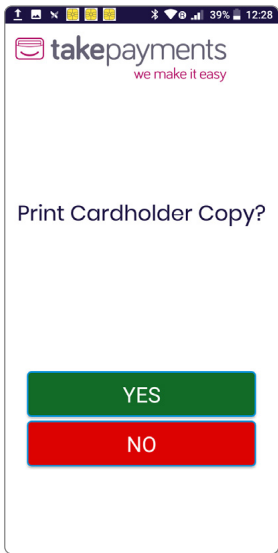
Tap “Pay Rest With Card”.

Completing a part Cash/Card payment continued



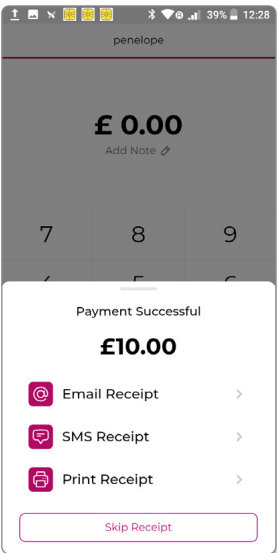
6

The remaining amount will now appear for card payment. When prompted, present the terminal to the customer to tap for contactless, or insert for Chip & PIN.



7

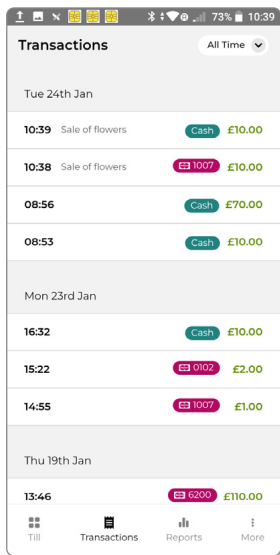
If card receipt printing is enabled in your **takepayments+** “More” settings, you will now be prompted with an option to print your cardholder and merchant receipts.



8

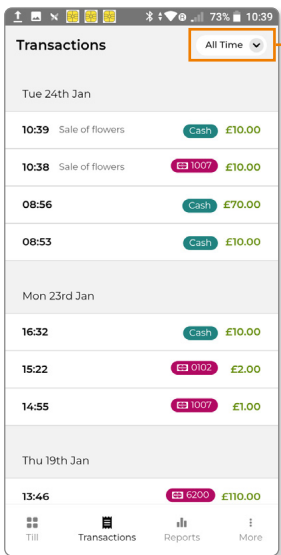
takepayments+ will now prompt with options to email, SMS, print, or skip the purchase receipt.

Viewing Transactions



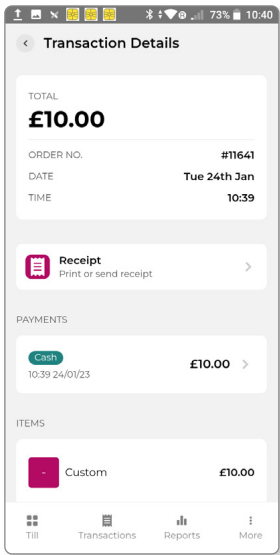
1

Tap the “Transactions”
tab at the bottom.



2

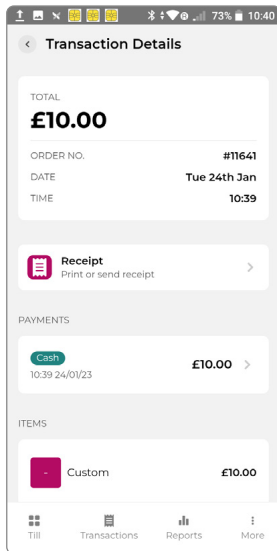
To locate a transaction,
either scroll down
the screen or use the
calendar accessible from
the drop down in the top
right to select a date.



3

Once located, tap the
transaction to view
more details.

Receipt Copies



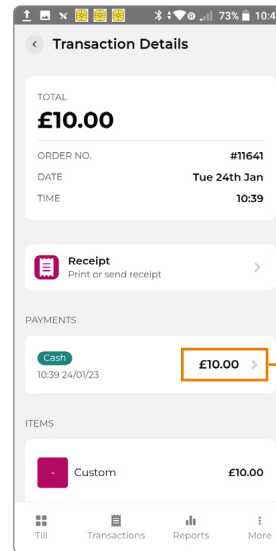
1 Tap “Receipt” to be presented with your receipt delivery options.

2 Tap “Email Receipt” followed by the email address to send a copy of the transaction receipt by email.

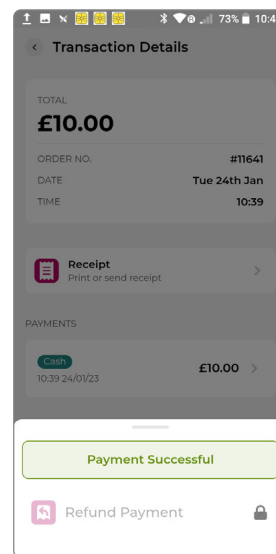
3 Tap “SMS Receipt” followed by the phone number to send a copy of the transaction receipt by SMS.

4 Tap “Print Receipt” to print a copy of the transaction receipt.

Refund a payment

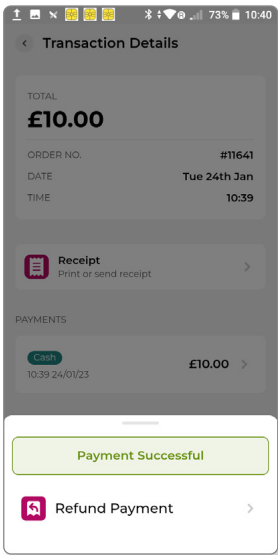


1 Tap the payment associated to the transaction you need to refund (in full or part).

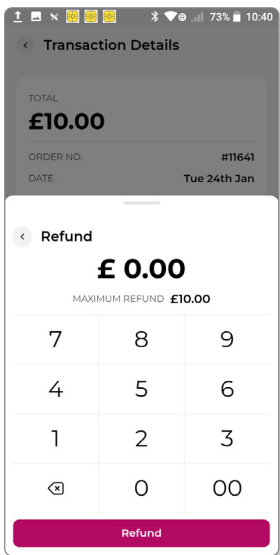


2 Tap “Refund Payment” which will show a lock symbol, and unlock by entering the supervisor PIN.

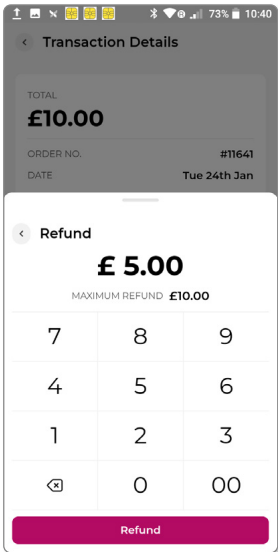
Refund a payment continued



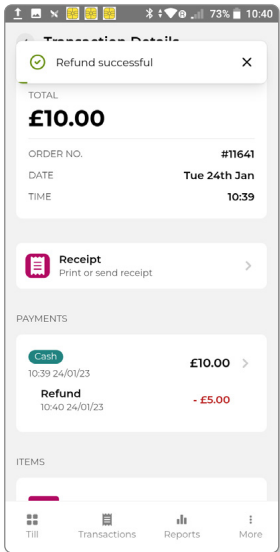
3 Tap “Refund Payment”.



4 Enter using the onscreen keypad the amount to refund (note you cannot refund more than the maximum amount shown onscreen).



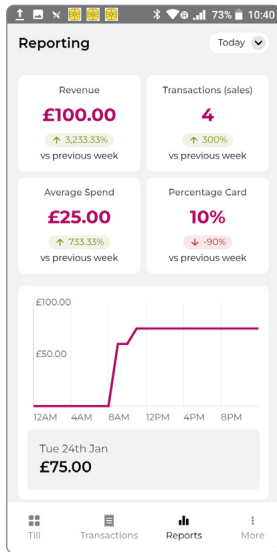
5 Tap “Refund”.



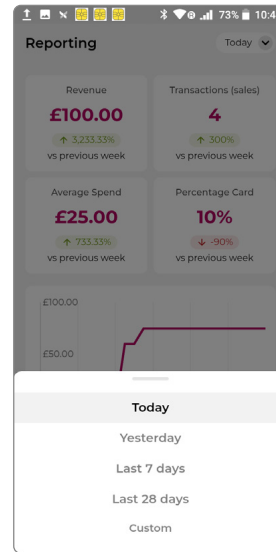
6 If the payment was a cash payment, you will see the refund is successful and the refunded transaction recorded. If the payment was a card payment, you will be taken to the payment screen to process the refund.

Key Statistics

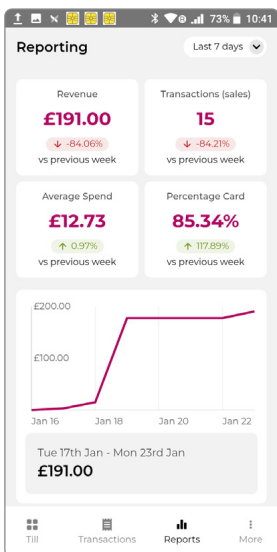
Your takepaymentsplus app has inbuilt reports to help you see at a glance how your business is running. Tap the “Reports” tab to access this.



At the top of the screen you will be presented with 4 key statistics. These are revenue, transactions (sales), average spend and percentage of payments by card.



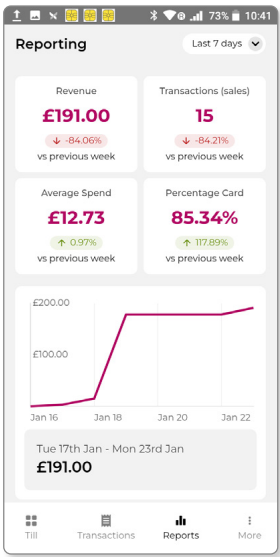
To change the time period, select the drop down in the top right and select from the periods available, or “Custom” to pick a particular date.



The statistics will now update automatically.

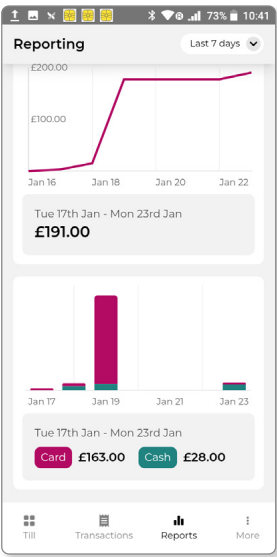
Pro Tip – Beneath each statistic, will be a % difference on the previous period. For example, if you select “Yesterday” as your time period, you will see the % difference vs the previous day.

Revenue Graph



The revenue graph will show you, for the time period selected, your sales revenue in that period. You can tap to interact with the graph to see the revenue in pounds (£) beneath the graph.

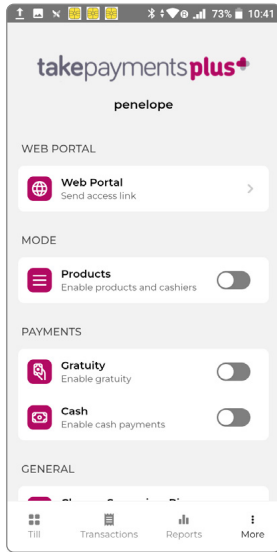
Cash/Card Graph



Scrolling to the bottom of the repots tab, you will find a graph showing you the cash vs card split for the time period selected. Again you can tap to interact with the graph and view the split for the time/day you tap.

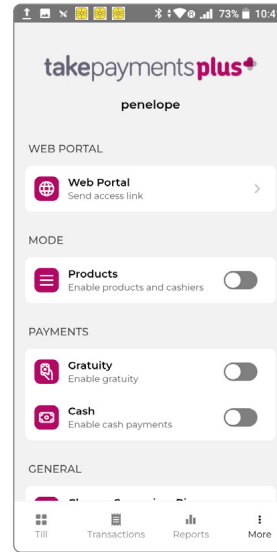
Configuring your takepayments+ App

The “More” Tab



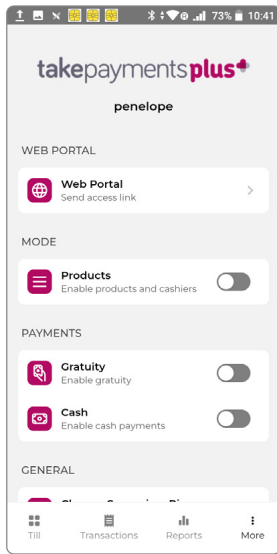
Within this tab you will see a variety of options related to your **takepayments+** app. Here you can control the features of your devices, enabling/disabling features and configuring settings.

Portal -> Portal

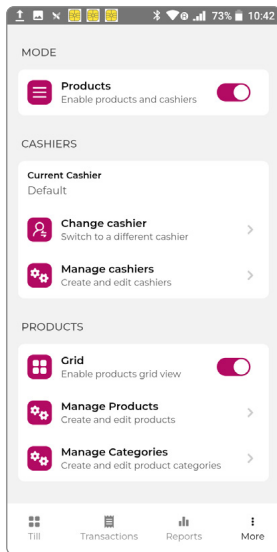


The “Web Portal” option enables you to send an email to the email addresses registered to your account. This email will contain a link to your online portal, where you can access even more reporting and controls for your **takepayments+** app.

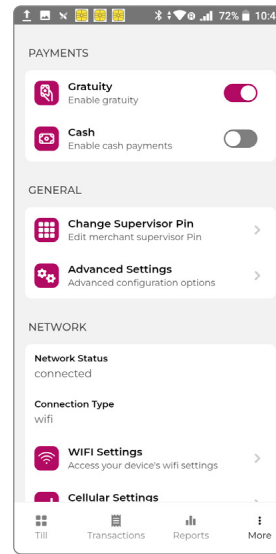
Mode -> Products



The “Products” switch allows you to enable products and cashiers on your app. By enabling this feature, further options will appear on the more screen and products will also be enabled on your “Till” tab.



Payments- > Gratuity

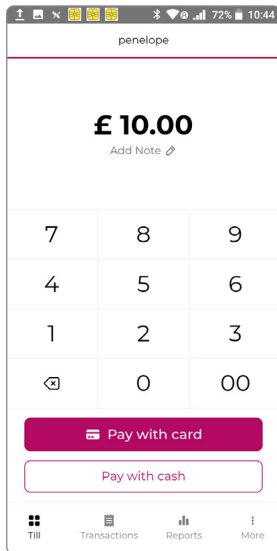


The Gratuity option enables gratuity upon payment on your **takepayments+** app. With this option enabled, when processing a cash or card sale the device will prompt for gratuity.

The customer can select from a list of pre-set percentages, enter a custom amount, or “No thanks” to continue without gratuity.

The gratuity payment is then automatically added to the total purchase amount.

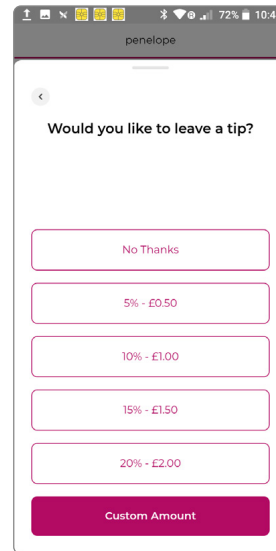
Payments- > Gratuity continued



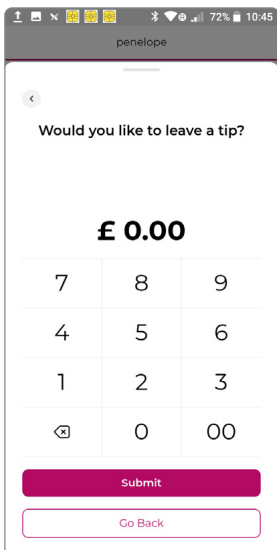
With Gratuity enabled, when processing a card or cash sale **takepayments+** will prompt for a tip. The terminal can be passed to the customer to confirm the tip amount.

1

Using the till enter a payment amount, or with products enables add the items to purchase and then press “Pay with card” or “Pay with cash”.

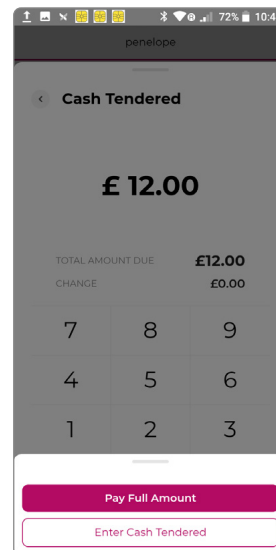
**2**

Before payment is completed, a prompt will appear stating “Would you like to leave a tip?”. Pass the terminal to the customer to confirm.

**3**

The customer can tap “No thanks”, a pre-set of 5% to 20% or to enter a custom amount.

- If entering a custom amount, the customer will need to use the keypad when prompted to enter the tip to pay.

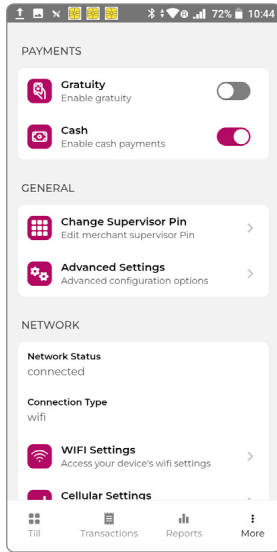
**4**

Once submitted this amount will automatically be added to the cash, or card total to be paid.

5

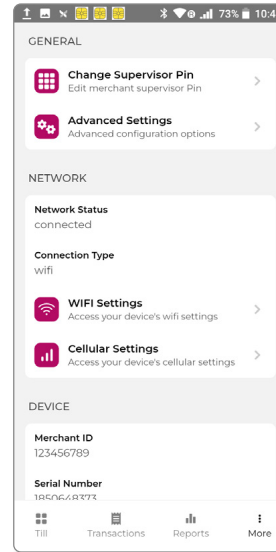
The card and transaction receipts will both provide a breakdown of gratuity paid on the transaction.

Payments -> Cash



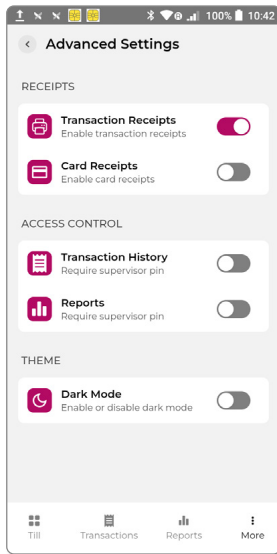
By default your **takepayments+** app will be configured to allow you to process cash payments. This switch allows you to enable/disable the cash option on your payment screens.

General -> Change Supervisor PIN

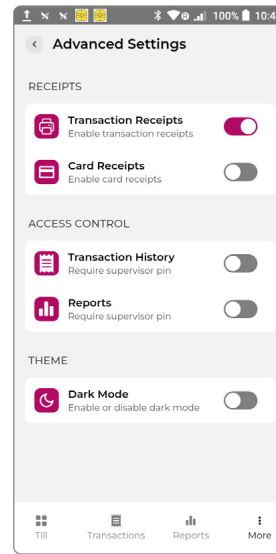


1. To change your supervisor PIN, tap “Change Supervisor PIN”.
2. When prompted, enter your current supervisor PIN.
3. Enter your new supervisor PIN, followed by re-entry to confirm.

General -> Advanced Settings

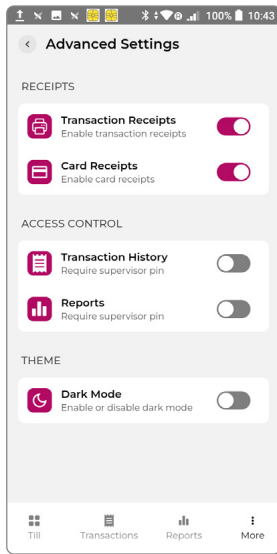


To access advanced settings, tap “Advanced Settings” and when prompted enter your supervisor PIN.

General -> Advanced Settings -> Receipts
-> Transaction Receipts

The “Transaction Receipts” option gives you the ability to enable/disable the option at the end of a transaction which allows you to email, SMS or print a transaction receipt.

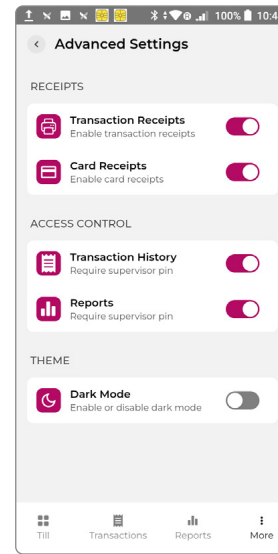
General -> Advanced Settings -> Receipts -> Card Receipts



The “Card Receipts” option gives you the ability to enable/disable your terminal from prompting for card payment, Cardholder and Merchant copy receipts. With this option enabled, after a card payment is completed your terminal will prompt for the cardholder receipt to be printed, and for a merchant copy to be printed.

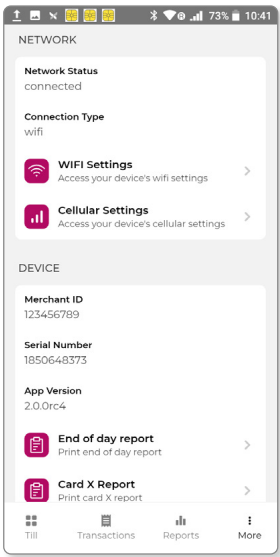
With this option disabled, your terminal will not prompt for the cardholder or merchant receipts.

General -> Advanced Settings -> Access Control -> Transaction History/Reports



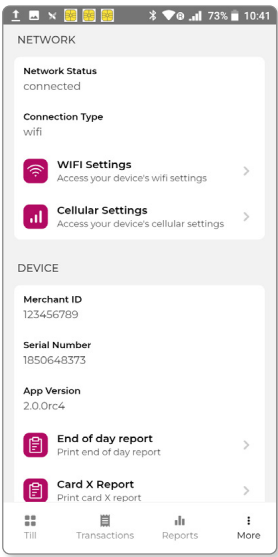
takepayments+ app allows you to restrict access to your transactions and reports tabs. Simply enable the “Transaction History” or “Reports” option in your advanced settings to restrict access by supervisor PIN to the Transactions and Reports tabs. Simply disable to allow all users to access these tabs.

Network

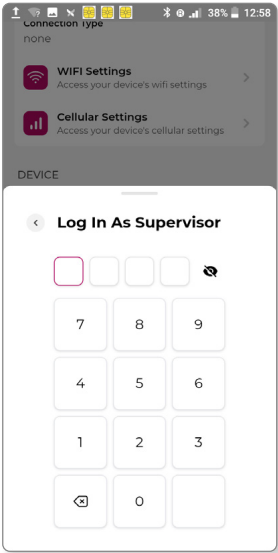


If you need to check how your device is connected, the “Network” section will show you the current network status (connected/disconnected) and connection type (WiFi/Cellular). Within this section, you can access the WiFi and Cellular settings directly by tapping the associated option.

Network – Connecting to WiFi

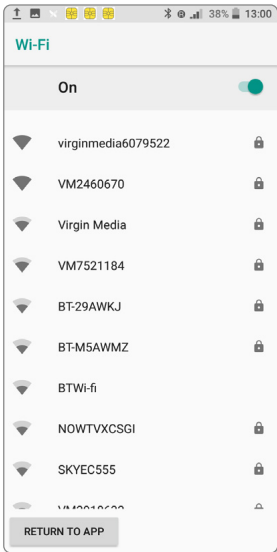


1 Tap “WiFi Settings”.

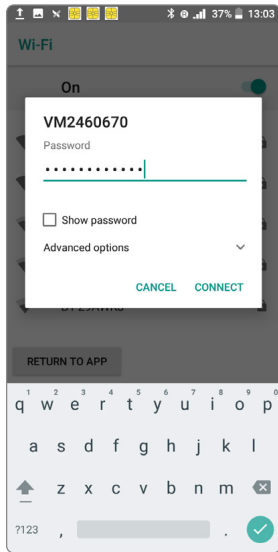


2 Enter the supervisor PIN when prompted.

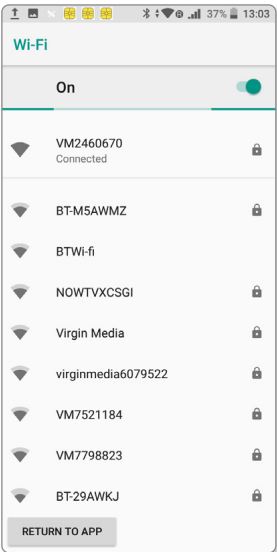
Network – Connecting to WiFi continued



3 The Android WiFi settings screen will now be displayed.

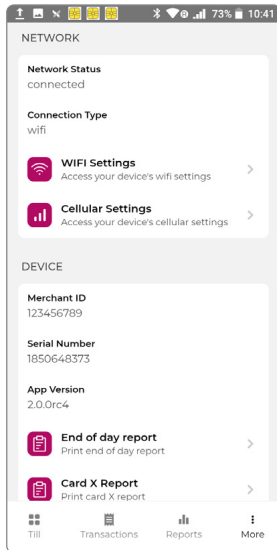


4 Tap the WiFi network and enter the password to connect.



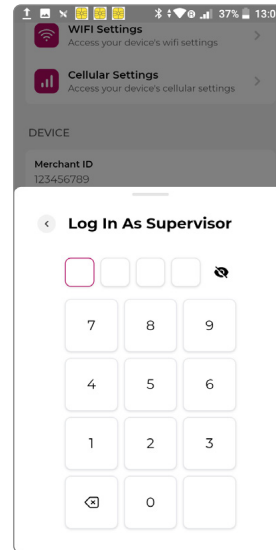
5 Tap “Return to app” once complete.

Network – Configuring Cellular Settings (APN)



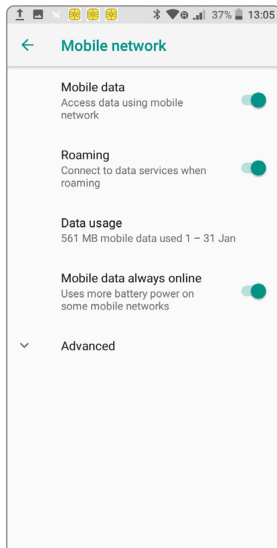
1

Tap “Cellular Settings”.



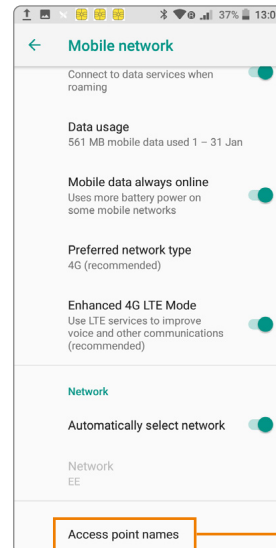
2

Enter the supervisor PIN when prompted.



3

The Android Cellular settings screen will now be displayed.



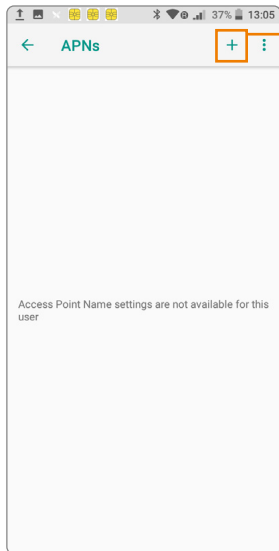
4

Tap “Advanced” to expand more options.

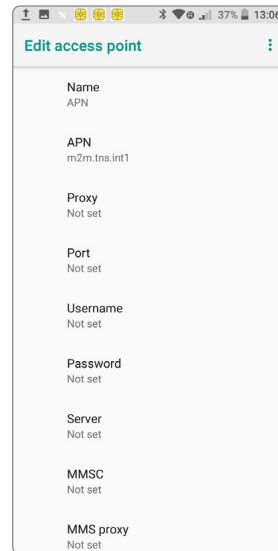
5

Tap “Access point names”.

Network – Configuring Cellular Settings (APN) continued

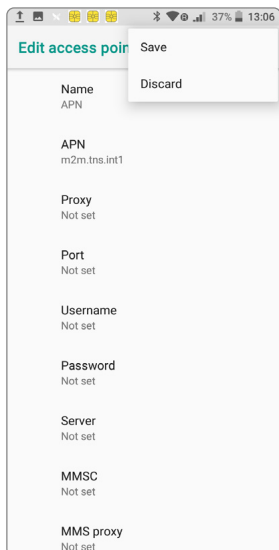


Click the “+” icon.



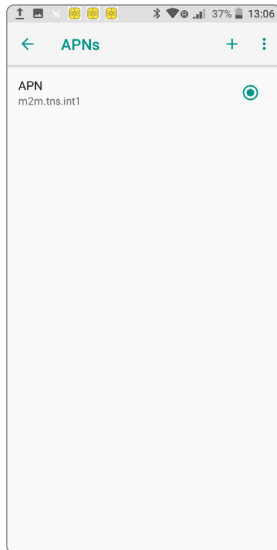
Enter the following details
(all other details can be
left as the default values)

- a. APN Name: APN
- b. APN: m2m.tns.int1



Tap the three dots in the
top right and tap “Save”.

Network – Configuring Cellular Settings (APN) continued



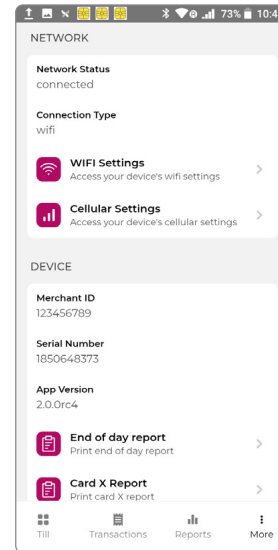
9

Ensure that the APN you have added is selected.

10

Tap the back arrow in the top left to return to **takepayments+**.

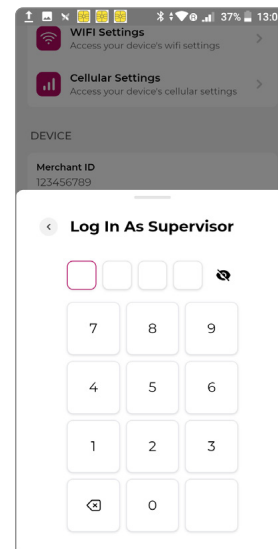
Network – Selecting a network



If you are in an area with poor signal, you can manually select the mobile network you wish to connect your device to.

1

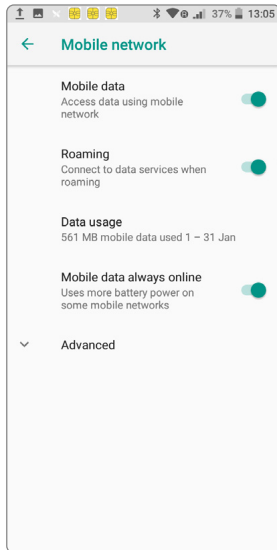
Tap “Cellular Settings”.



2

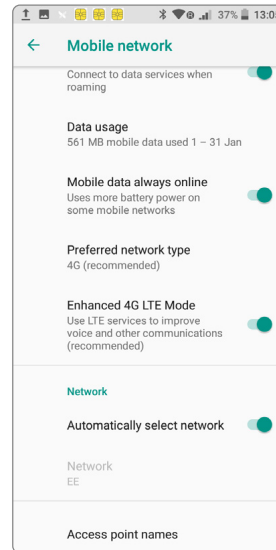
Enter the supervisor PIN when prompted.

Network – Selecting a network continued



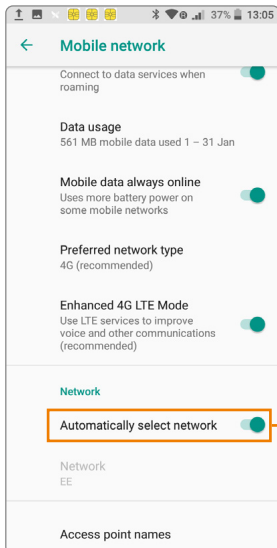
3

The Android Cellular settings screen will now be displayed.



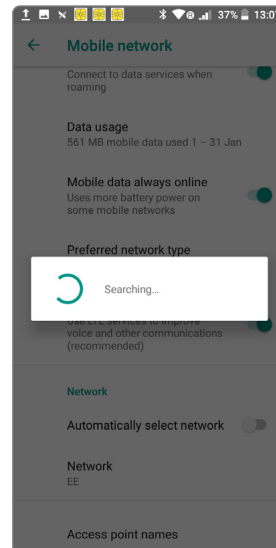
4

Tap “Advanced” to expand more options.



5

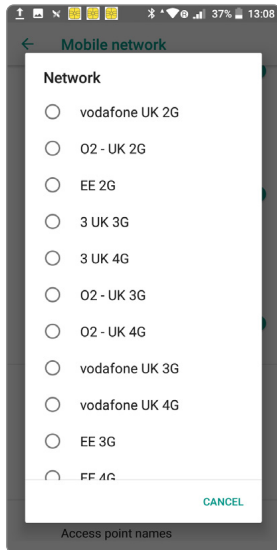
Tap “Automatically select network” to turn this off.



6

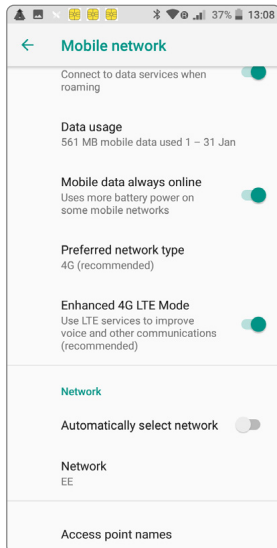
The device will now search for available mobile networks, this can take a few minutes.

Network – Selecting a network continued



7

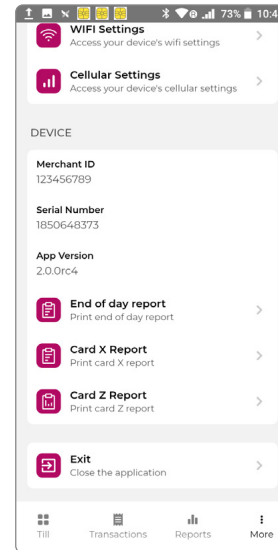
Once the list appears, tap the network you wish to connect to.



8

Tap the back arrow in the top left to return to **takepayments+**.

Device



This section provides you basic information on your terminal, which is useful if you require technical support and to contact **takepayments**.

In this section is also options to print various reports.

Device -> End of day report

Your end of day report is available for you to print at any time during your day. This will provide a simple print out of both cash and card transaction counts and amounts, refunds, and breakdown of gratuity.

Device -> Card Z Report

Your Card Z report is an “end of day” report that and helps you to reconcile the card payments completed since the last Z report.

Tap “Card Z Report” and this will be printed from the terminal.

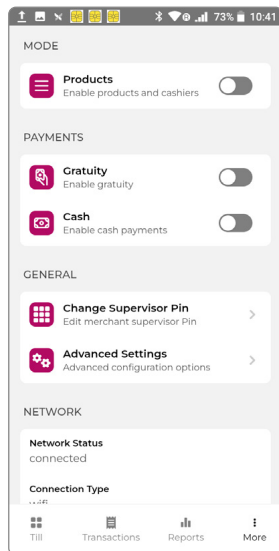
Device -> Card X Report

Your Card X report is an “end of shift” report that will provide a print out of the card sales completed so far, since the last end of day.

Tap “Card X Report” and this will be printed from the terminal.

Products Mode – Enabling & Configuring

Your takepayments+ app comes ready for you to load on your products, categories, and cashiers. To enable this mode;



1

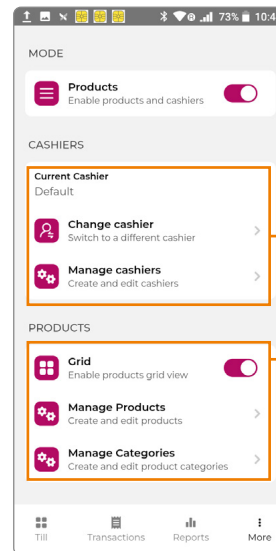
Tap the “More” tab.

2

Tap the “Products” switch under “Mode”.

3

Enter your Supervisor PIN when prompted.

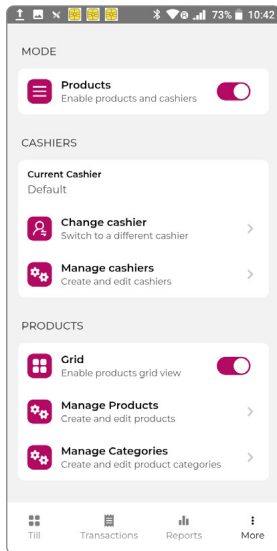


4

The Products switch will now be enabled.

By enabling this mode, you will now have access to additional settings within your “More” tab. Your “Till” screen will also now be enabled with product features.

Products - Adding products

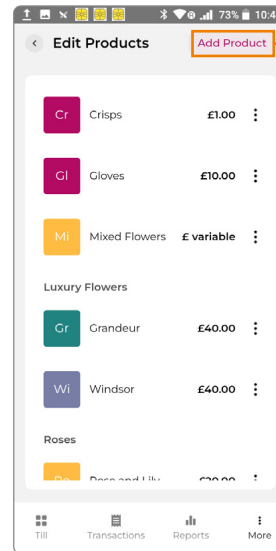


1

Tap “Manage Products” from the “More” tab.

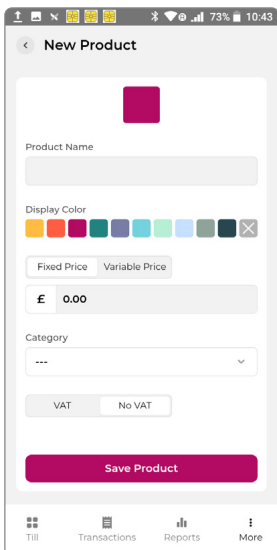
2

Enter your supervisor PIN when prompted.



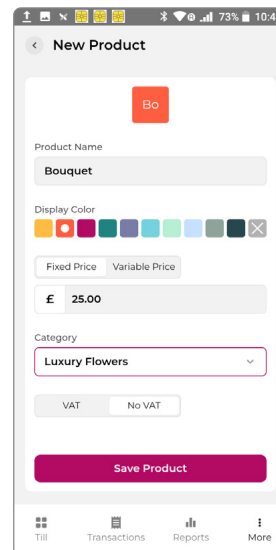
3

From the “Edit Products” screen tap “Add Product”.



4

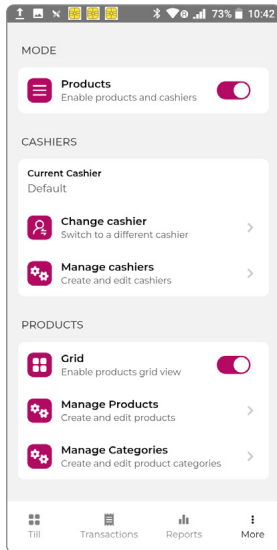
You will now need to enter the details of your product, including the product name, price and category. You can also optionally select a colour for the icon of the product, and enable VAT if required.



5

Once complete, tap “Save Product”.

Products – Adding products continued

**6**

You will be taken back to the “Edit Products” screen and will see your product now on this page.

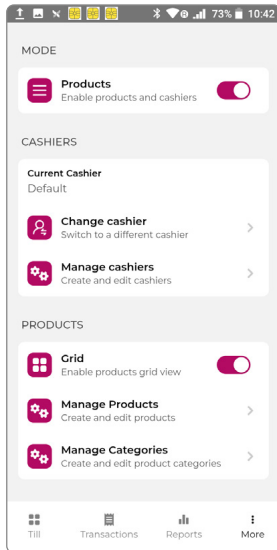
Products – Editing a product

1. Tap “Manage Products” from the “More” tab.
2. Enter your supervisor PIN when prompted.
3. Locate your product on this screen
 - a. **Pro Tip** – if you swipe down to scroll up, you will find a search bar to help you locate your product by entering the product name.
4. Tap the three dots next to the product to edit, and tap “Edit Product”.
5. Update the product as required.
6. Once complete, tap “Save Product”.
7. You will be taken back to the “Edit Products” screen and will see your product now on this page.

Products – Deleting a product

1. Tap “Manage Products” from the “More” tab.
2. Enter your supervisor PIN when prompted.
3. Locate your product on this screen
 - a. **Pro Tip** – if you swipe down to scroll up, you will find a search bar to help you locate your product by entering the product name.
4. Tap the three dots next to the product to edit, and tap “Delete Product”.
5. You will be taken back to the “Edit Products” screen and the product will now be deleted.

Categories - Adding products

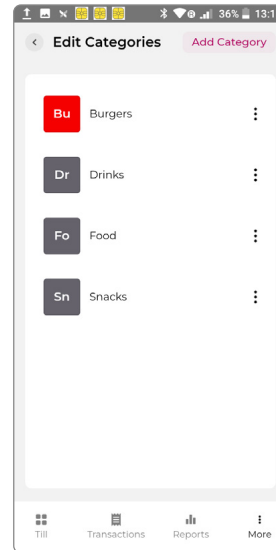


1

Tap “Manage Categories” from the “More” tab.

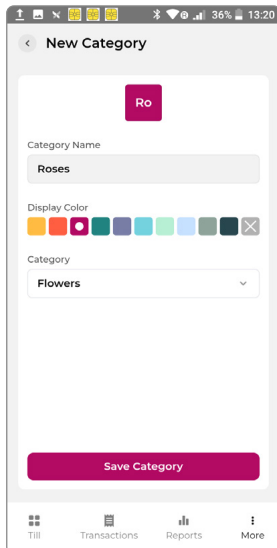
2

Enter your supervisor PIN when prompted.



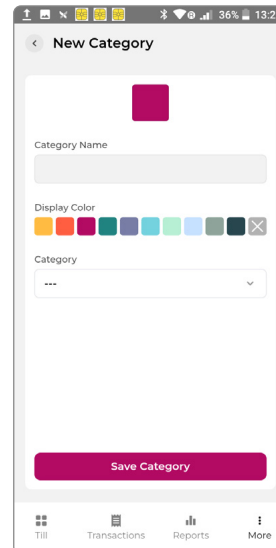
3

From the “Edit Categories” screen tap “Add Category”.



4

You will now need to enter the details of your category, including the category name, display colour. If the category is a “sub category” of another, for example Flowers -> Roses, you can select the category for the new one to sit under.



5

Once complete, tap “Save Category”.

6

You will be taken back to the “Edit Categories” screen and will see your category now on this page.

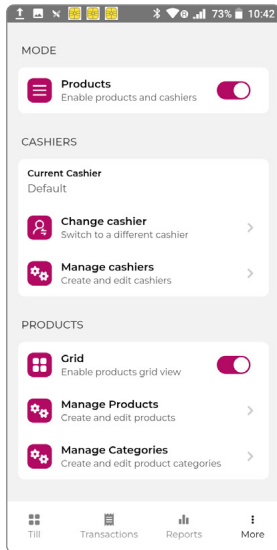
Categories – Editing a category

1. Tap “Manage Categories” from the “More” tab.
2. Enter your supervisor PIN when prompted.
7. Locate your category on this screen.
3. Tap the three dots next to the product to edit, and tap “Edit Category”.
4. Update the product as required.
5. Once complete, tap “Save Category”.
6. You will be taken back to the “Edit Categories” screen and will see your category now on this page.

Categories – Deleting a category

1. Tap “Manage Categories” from the “More” tab.
2. Enter your supervisor PIN when prompted.
3. Locate your category on this screen.
4. Tap the three dots next to the product to edit, and tap “Delete Category”.
5. You will be taken back to the “Edit Categories” screen and the product will now be deleted.

Cashier - Adding cashiers

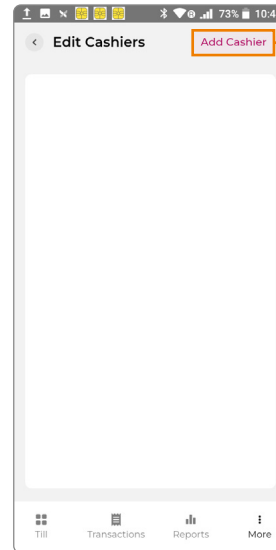


1

Tap “Manage Cashiers” from the “More” tab.

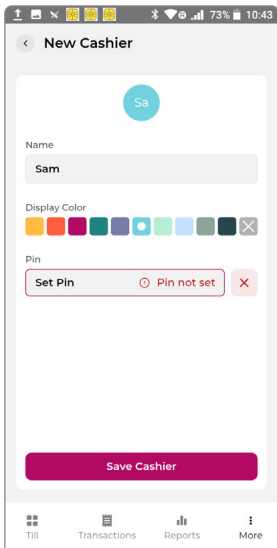
2

Enter your supervisor PIN when prompted.



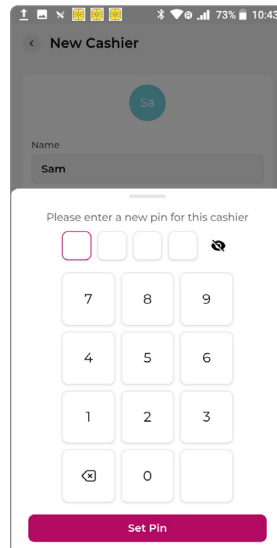
3

From the “Edit Cashiers” screen tap “Add Cashier”.

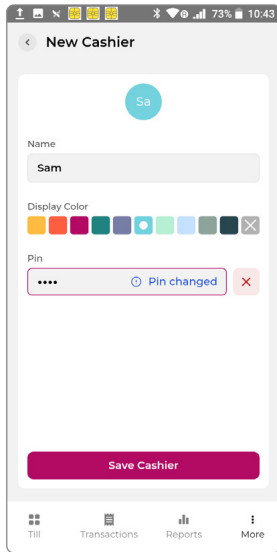


4

You will now need to enter the details of your cashier, including the cashier name and display colour. You can also optionally set a PIN for the cashier.



Cashier – Adding cashiers continued

**5**

Once complete, tap “Save Cashier”.

6. You will be taken back to the “Edit Cashiers” screen and will see your cashier now on this page.

Cashier – Editing a cashiers

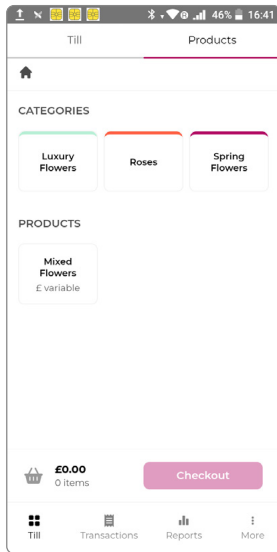
1. Tap “Manage Cashiers” from the “More” tab.
2. Enter your supervisor PIN when prompted.
3. Locate your cashier on this screen.
4. Tap the three dots next to the product to edit, and tap “Edit Cashier”.
5. Update the product as required.
6. Once complete, tap “Save Cashier”
7. You will be taken back to the “Edit Cashier” screen and will see your cashier now on this page.

Cashier – Deleting a cashier

1. Tap “Manage Cashiers” from the “More” tab.
2. Enter your supervisor PIN when prompted.
3. Locate your cashier on this screen.
4. Tap the three dots next to the product to edit, and tap “Delete Cashier”.
5. You will be taken back to the “Edit Cashier” screen and the cashier will now be deleted.

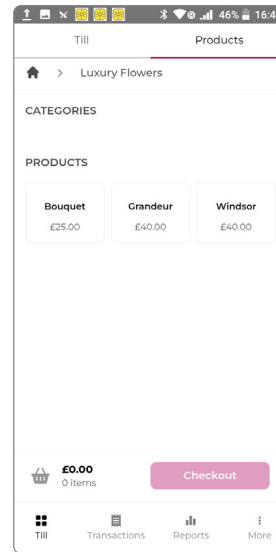
Products Mode – Using the till

Products Mode – Making a sale using products

**1**

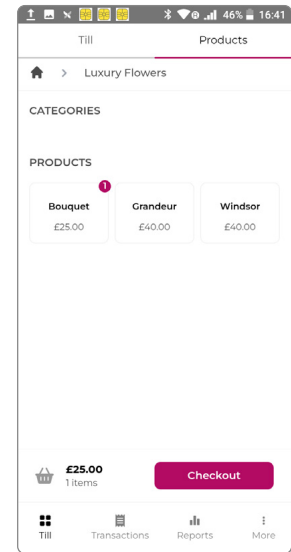
From the “Till” tab select “Products” from the top of the screen.

With products mode enabled, the till screen will now be updated on your **takepayments+** app. This will enable both a “Till” and “Products” tab on the till screen.

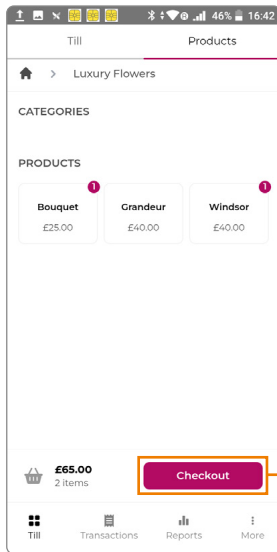
**2**

Using the navigation of categories to locate the product and tap to add to your basket.

- a. Tap the same product again to add multiple quantities.



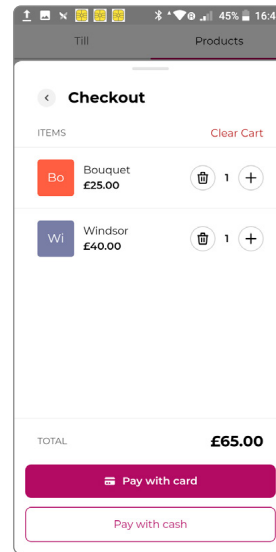
Products Mode – Making a sale using products continued

**3**

Repeat step 2 to add all products required to the basket.

4

Once complete, tap “Checkout” to review the items to be purchased and paid for.

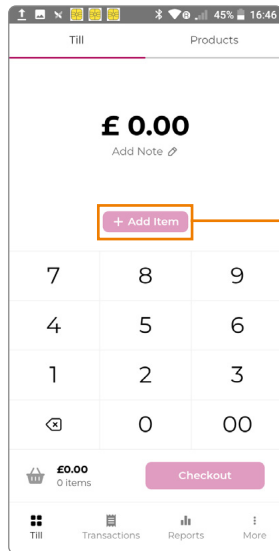
**5**

From this screen, you can increase/decrease the item quantities and delete from the checkout if required.

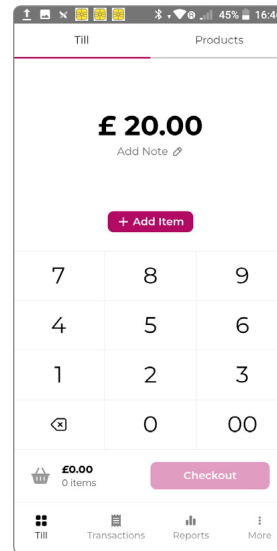
- a. Pro Tip – if you need to start again, tap “Clear Cart” in the top right to empty the checkout and start again.

6. Once ready to complete the purchase, tap “Pay with card” or “Pay with cash” to complete the sale. You can refer back to Page 3 on how to complete these steps.

Product Mode – Adding an item

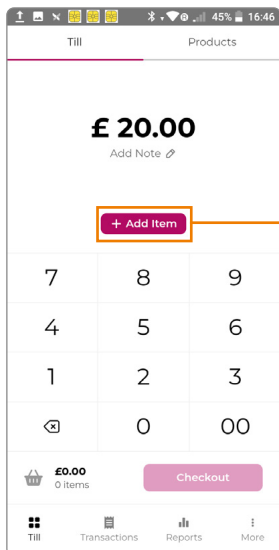


If you need to process a sale for a product you have not yet added to takepayments+, you can use the “Add item” feature on the till.

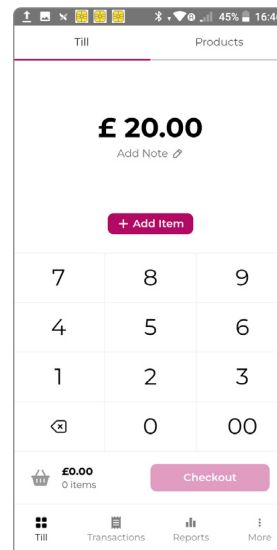
**1**

From the “Till” tab, start by using the number pad to enter the item cost.

- a. Pro Tip – you can enter a note against this item which is displayed in the checkout and on the receipt.

**2**

First enter the amount of the item to be added. Then tap “Add item” and repeat this step for any further items you need to add.

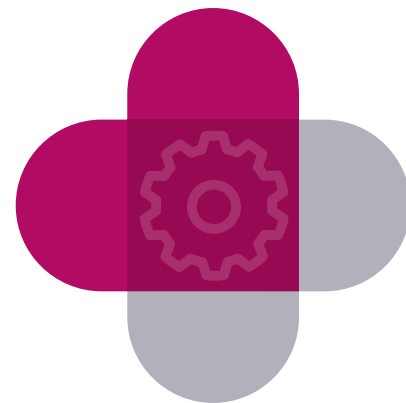
**3**

Once complete, tap “Checkout” to review the items to be purchased and paid for.

Product Mode – Adding an item continued

4. From this screen, you can increase/decrease the item quantities and delete from the checkout if required.
 - a. **Pro Tip** – if you need to start again, tap “Clear cart” in the top right to empty the checkout and start again.
5. Once ready to complete the purchase, tap “Pay with card” or “Pay with cash” to complete the sale. You can refer back to Page 3 on how to complete these steps.

We're here to help make things easy.



For any installation
questions, give our
team a call on:

01606 566 600

Monday-Friday, 9am-5pm

takepayments.com



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 **takepayments**
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