

tPOS | CRM

Customer Relationship Management Guide.



Point of sale made easy.

 **takepayments**
we make it easy

Activating your portal access.

To gain access, make sure you select **'Administrator'** to the full CRM (Customer Relationship Management) features, including **'Appointments'** and **'Customer Profiles'**.

A merchant link to login will be sent, along with a temporary password: **TakePayments1**. A prompt to change the password will then be offered the next time login is attempted.

Version 19.12.2018

Terms and Conditions to be included with the register software

End User Licence Agreement (EULA)

The Licence desires to access and use the Software (as defined below), is willing to grant Licensee the rights to do so on the following terms (this "Agreement"). The parties agree as follows:

SECTION :: DEFINITIONS

Whenever the context requires, the singular form of words shall include the plural (and *vice versa*). The following capitalised terms used herein shall have the meaning given below:

Logout

Accept Agreement

Enabling CRM features on the portal.

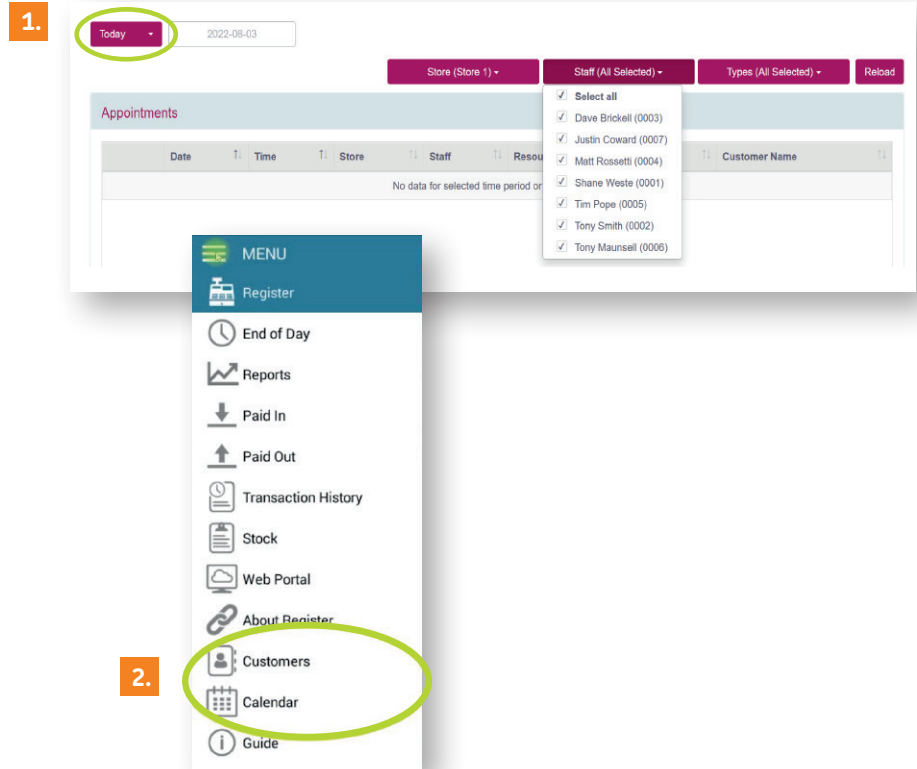
- Click **'Config'** at the top and select **'Profile'**.
- Click on to the **'Pencil Icon'** to open that profile and open the drop down for **'General'**.
- Enable CRM as **'Yes'**.
- Scroll down to **'Save'** and then **'Close'**.
- Repeat this process on any profiles that will require the use of CRM features.

The screenshot shows the tPOS CRM configuration interface. At the top, the 'Config' menu is highlighted. Below it, the 'Profile' section is open, showing settings for 'Example Profile'. The 'General' tab is selected, and the 'Enable CRM' option is set to 'Yes', which is circled in yellow. Other settings include 'Automatically Update Register' (set to 'Update on Start Day'), 'CRM Conflict Warnings' (set to 'Affected POS User and All Supervisors'), 'Keep Local Data for X Days' (set to '90'), 'Staff Login Method' (set to 'Name and Pin'), 'Logout User After Each Transaction' (set to 'No'), 'Logout User After X Seconds' (set to '300'), 'Staff Login Screen' (set to 'Single Staff Member Column'), 'Register User Guide' (set to 'https://www.manula.com/manuals/register-manual/register-ma'), 'Web Portal URL' (set to 'https://portal.smartvolution.com'), and 'Price List Selection Message' (set to 'Please Select Price List').

Appointments.

1. CRM is only available to Hospitality users and it's where you can view all the appointments/reservations booked-in for your business. Choose to view by 'Date, Store Location' and 'staff Member'.

2. You can also view this on the till system, where it's easy to add your bookings and appointments directly on the till.



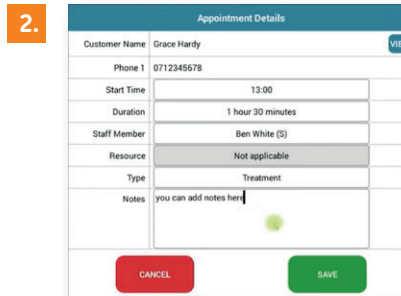
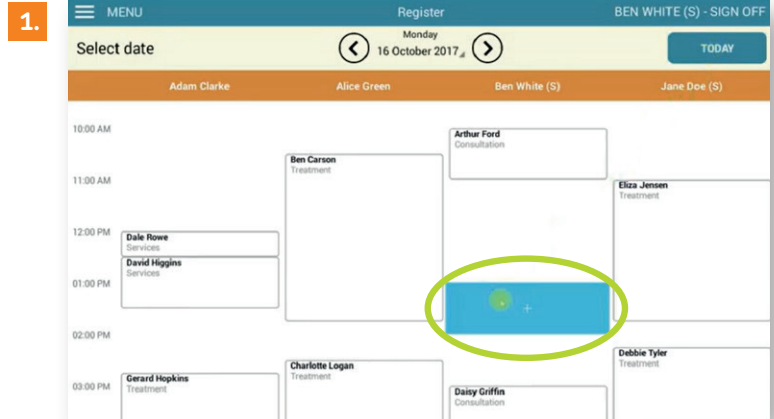
Appointments on the till system.

When selecting '**Calendar**' on the till – it will bring up today's Calendar and Appointments.

1. Double click where you want to book a new appointment or reservation and it will highlight blue.

By default, it is set to Staff Members for appointment columns. To change, add a list – then select '**Config**' – '**Stores**' to use for your appointments, such as Table Numbers.

2. You can now view a summary of the appointment details you are booking, amend the time and select the appointment type, for example, the duration of the booking time. These are configured in '**Config**' – '**Customer Fields**'.



Appointments.

1. See Appointment Types, which are configured on the portal under 'Config' – 'Lists' and select 'Appointment Type'.

2. You can view specific dates by clicking the date or browse various dates by clicking on the arrows to see appointments. Jump back to today's Calendar by clicking 'Today' in the top right-hand side.

3. To amend any existing bookings, simply double click on the appointment to change the details.


1.

Lists	
	Name
  	Age Accepted Reasons
  	Age Refusal Reasons
  	Appointment Type
  	Cancel Sale Reasons

2.

Please select appointment type

Consultation

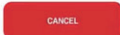
Treatment 

Reservation

Repair

Services

Business Function



3.

Register

Tuesday 17 October 2017

Clarke Alice Green Ben White (5)

Set date

October 2017

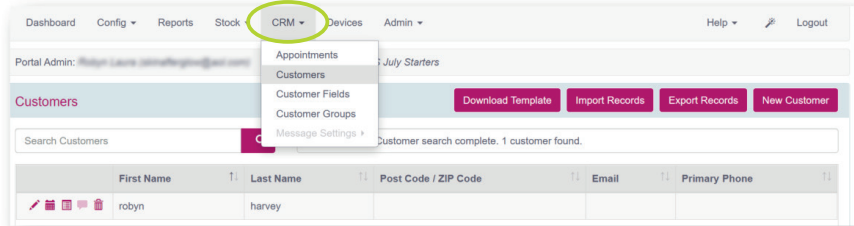
16 Sep 2016 17 Oct 2017 18 Nov 2018

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Done

Appointments on the web portal.

1.



1. To add an appointment from the Portal, select '**CRM**' drop down to '**Customers**'. Search your customer and click on to the second icon calendar then select '**New Appointment**'.

2. Select the '**Date**' and fill in the Appointment/Reservation details, followed by '**Save**'.

2.

The screenshot shows the 'Appointment' form in the tPOS CRM web portal. The form has fields for 'First Name', 'Last Name', 'Primary Phone', 'Secondary Phone', 'Email', 'Type', 'Date', 'Start Time', 'Duration', 'Store', and 'Notes'. The 'Date' field is highlighted with a red circle. The 'Type' dropdown menu is open, showing options: 'Please select an option (Required)', 'Date', and 'Required'. The 'Date' option is selected. The 'Start Time' field is also highlighted with a red circle. The 'Duration' dropdown menu is open, showing options: 'Please select an option (Required)', 'Date', and 'Required'. The 'Store' dropdown menu is open, showing options: 'Please select an option (Required)', 'Date', and 'Required'. The 'Notes' field is a text area.

Customers on the tPOS till system.

1. From the till you can add a customer by clicking on the three menu lines in the top left corner, then select **'Customers'**.
2. This is where you can search for your customer and add them to the transaction you are currently on by selecting **'Link to Transaction'**, which will then record that purchase under the customer's details.
3. You can add a customer by clicking **'New Customer'** then complete the required fields. These can be created in the portal by making a List.
4. Once you've found your customer, select **'Transactions'**, which will display the customer's past purchases. Click **'Appointments'** to view their previous appointments or **'Details'** to view or amend the customer's details. For example, if they have a new mobile number, etc.

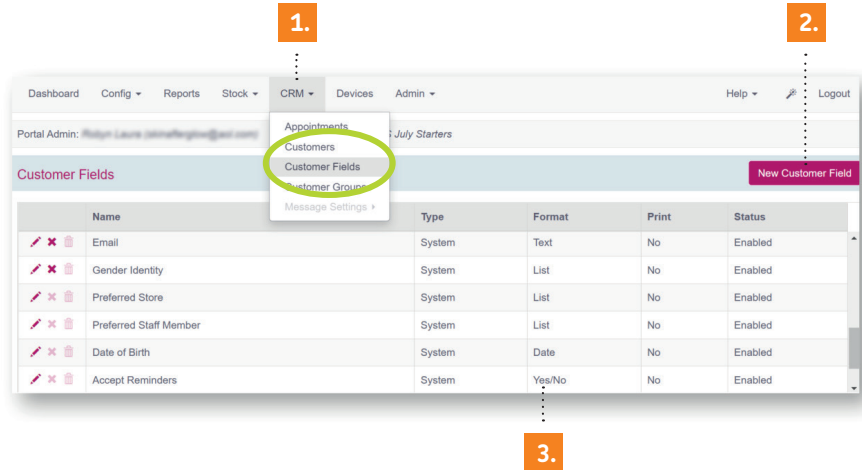
The screenshot displays the tPOS CRM interface. At the top, a blue header bar contains a menu icon (three horizontal lines) on the left, the word 'Register' in the center, and 'BEN WHITE (S) - SIGN OFF' on the right. Below the header, a search bar with the placeholder text 'SCAN BARCODE OR ENTER SEARCH INFO' and a 'SEARCH' button is visible. A green circle highlights the search bar, with a callout '2.' pointing to it. To the left of the search bar, a callout '1.' points to the menu icon. Below the search bar, there are two columns: 'CUSTOMER NAME' and 'PHONE'. A 'NEW CUSTOMER' button is located at the bottom left of the search results area, with a callout '3.' pointing to it. On the right side of the interface, there are three tabs: 'DETAILS', 'APPOINTMENTS', and 'TRANSACTIONS'. The 'DETAILS' tab is selected. Below the tabs, there are several input fields for customer information: 'Customer Code', 'Profile Picture' (with a placeholder image), 'First Name', 'Last Name', 'Address Line 1', 'Address Line 2', 'Town / City', 'Region', and 'Country'. A callout '4.' points to the 'Link to Transaction' button at the top right of the details section.

Customer Fields on the web portal.

1. Now you can personalise your customer's information by selecting '**CRM**' – '**Customer Fields**'.

2. To disable a Customer Field, simply click the '**X**' next to it, then click to create a new Customer Field by selecting '**New Customer Field**'.

3. Click the word '**Yes**' when adding a customer to ensure they receive text reminders.



Customer Fields on the web portal.

1. When adding a new Customer Field, you can select one of the lists created earlier to give you more information about your customer.

2. Simply hover over your Customer Field to create a new order of Customer Fields.

1. Customer Field

Name: Child's Interests

Format: List

Select List: Please select an option (Required)

Required: Please select an option (Required)

Child's Interests

Party Rooms

Cancel Save

2. Customer Fields

New Customer Field

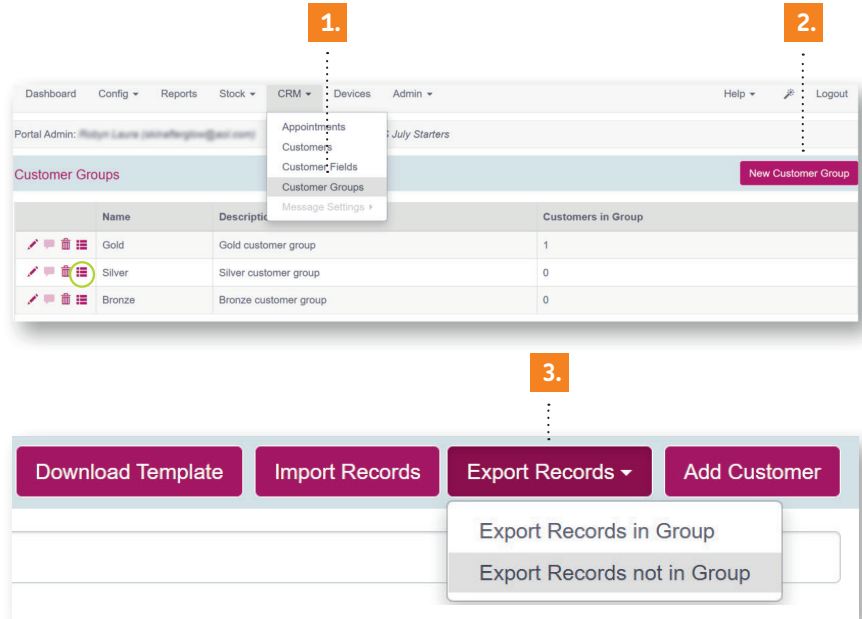
Name	Type	Format	Status
Email	System	Text	Enabled
Gender Identity	System	List	Enabled
Prefereed Store	System	List	Enabled
Child's Interests	Custom	List	Enabled
Prefereed Staff Member	System	List	Enabled
Date of Birth	System	Date	Enabled
Accept Reminders	System	Yes/No	Enabled
Accept 3rd Party Marketing	System	Yes/No	Enabled
Accept Marketing	System	Yes/No	Enabled
Toy Club Member	Custom	Yes/No	Enabled

Customer Groups on the web portal.

1. This section allows you to categorise your customers and be able to identify if they are a Platinum or Gold customer to receive discounts on every purchase or regular offers to entice them to buy more often.

2. Create your own group category by clicking **'New Customer Group'** then select the **'Squares icon'** next to the group you want to add your customers to.

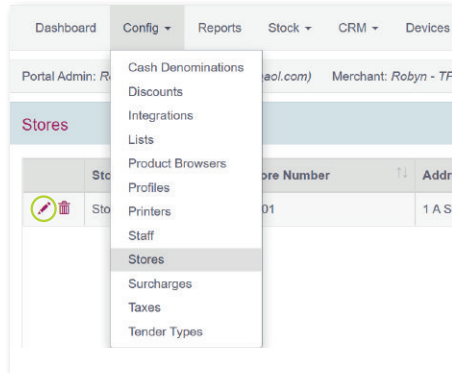
3. You can bulk assign customers to a group by clicking **'Export Records'** and adding the group onto the Excel spreadsheet to each customer. This in turn imports records back into the portal. On the till you can also add a customer to a group when creating a new customer.



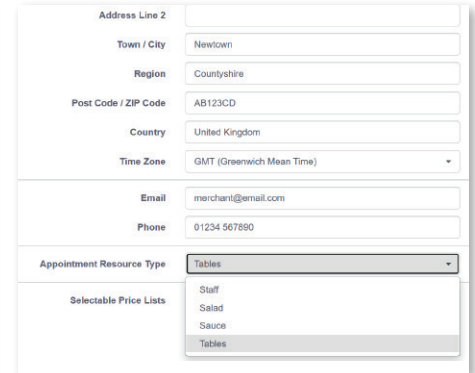
Stores on the web portal.

1. To change the default appointment type from Staff Members, Table numbers or something else, click **'Config – Stores'** from the drop down. Now select the **'Pencil'** icon.

2. Scroll down to **'Appointment Resource Type'** to select the correct list and to save, click **'Yes'**.



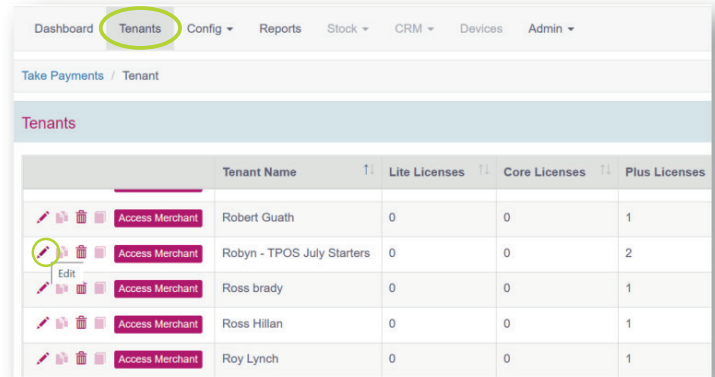
1.



2.

Text Message Reminders on the web portal.

1. First, select **'Tenants'** at the top and then click into the merchant's name by selecting the **'Pencil icon'**, to edit the their details.
2. The merchant's tPOS details will now be displayed.
3. Scroll down to find **'Message Bundle Type'** and change this to **'Pay as You Go'**, then click **'Yes'** to **'Allow Duplication'**.



The screenshot shows the 'Merchant' details form. The 'Name' field is filled with 'Robyn - TPOS July Starters'. The 'Type' is set to 'Hospitality'. The 'Number of Licenses' section shows 'Lite Licenses' as 0, 'Core Licenses' as 0, 'Plus Licenses' as 2, and 'Service Licenses' as 0. The 'Billing Type' is set to 'Not Set' and the 'Billing Cycle Start Date' is set to '1st'. The 'Message Bundle Type' is set to 'None'.

The screenshot shows the 'Merchant' details form with the 'Message Bundle Type' set to 'Pay as You Go' and 'Allow Duplication' set to 'Yes'. The 'Pay as You Go' option is highlighted with a green circle, and the 'Yes' option for 'Allow Duplication' is also highlighted with a green circle.

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Text Message Reminders.

1. To configure your text, select 'CRM – Message Settings'.
2. First, create a name that the text message will come from that has a maximum of 11 characters. You can enable up to three text message reminders for your customers to receive. Select 'Yes' for the chosen text messages and customise the message below each section.
3. You can also decide if the customer receives a text when they have changed their appointment and select the time when they receive it. Now scroll down and press 'Save'.

1.

From: YourToyShop

Send Appointment Confirmation: Yes

Confirmation Message: Hi [customerFirstName], your appointment at our [storeName] store is booked for [appointmentDate] at [appointmentStartTime]. Thanks.
Messages longer than 160 characters, when sent, will use multiple texts.

Send Appointment Change: No

Send Appointment Reminder: No

Send Second Appointment Reminder: No

Send Appointment Cancellations: No

Send Birthday Greeting: No

Message Bundle: Texts50(Included)

Texts Remaining in Bundle: 50

Out of Bundle Texts: 0

From: YourToyShop

Send Appointment Confirmation: Yes

Confirmation Message: Hi [customerFirstName], your appointment at our [storeName] store is booked for [appointmentDate] at [appointmentStartTime]. Thanks.
Messages longer than 160 characters, when sent, will use multiple texts.

Send Appointment Change: Yes

On Date Change: ☒

On Start Time Change: ☐

On Duration Change: ☐

On Date Change: ☐

On Location Change: ☐

On Time Change: ☐

Change Message: Hi [customerFirstName], your appointment at our [storeName] store has been changed to [appointmentDate] at [appointmentStartTime]. Thanks.
Messages longer than 160 characters, when sent, will use multiple texts.

2.

Send Appointment Reminder: 1 Week Before

Reminder Message: Hi [customerFirstName], just a reminder that your appointment at our [storeName] store is booked for [appointmentDate] at [appointmentStartTime]. Thanks.
Messages longer than 160 characters, when sent, will use multiple texts.

Send Second Appointment Reminder: No

Send Appointment Cancellations: 1 Day Before

3.

Take charge of your business with tPOS.

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Terms and Conditions apply.

*SMS charges will apply.

△Kitchen Printer is available at an extra cost.

†Additional card machines must be approved by **takepayments**' nominated provider of merchant acquiring services. Additional card machines must be supplied only by **takepayments** at additional cost and require a separate contract.

Businesses will be required to enter into and maintain a separate contract with an acquiring bank nominated by **takepayments** for the processing of the card transactions. Under the contract with the acquiring bank, transaction charges and other fees will apply.

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