tPOS | CRM

Customer Relationship Management Guide.

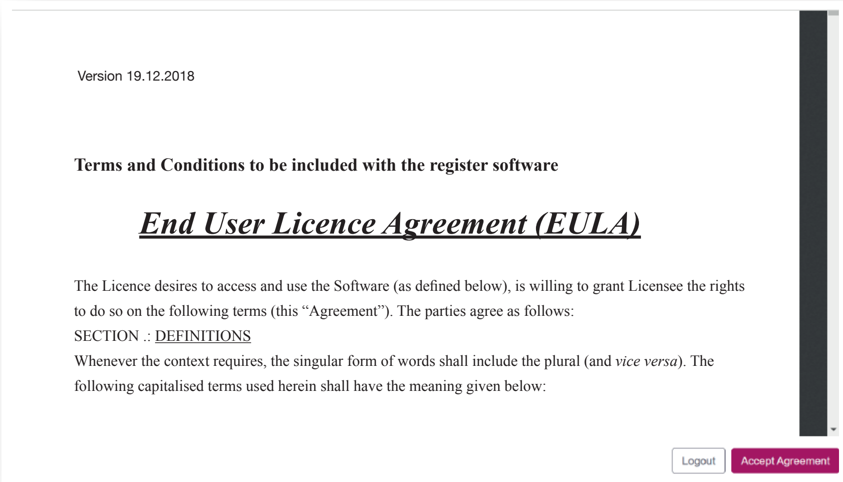
Point of sale made easy.

takepayments
we make it easy

Activating your portal access.

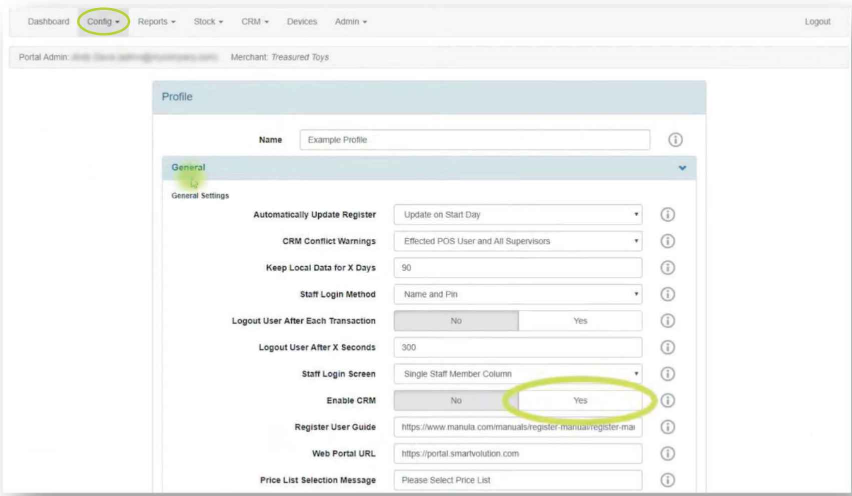
To gain access, make sure you select '**Administrator**' to the full CRM (Customer Relationship Management) features, including '**Appointments**' and '**Customer Profiles**'.

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 attemted.



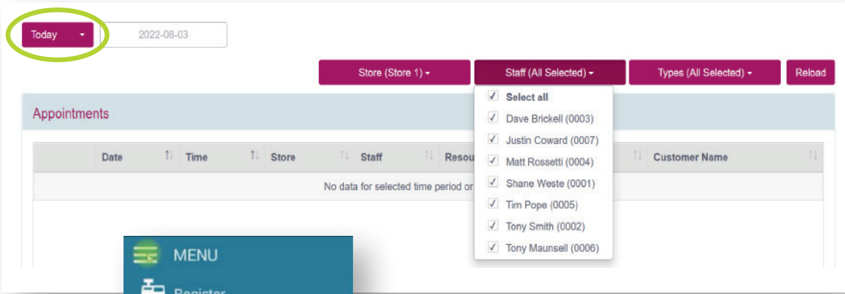
Enabling CRM features on the portal.

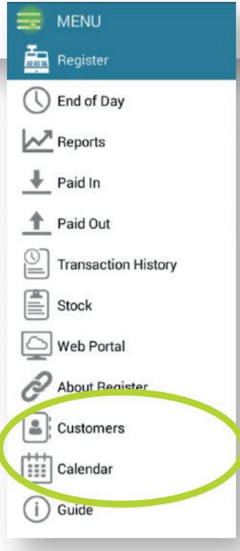
- Click **'Config'** at the top and select **'Profile'**.
- Click on to the '**Pencil Icon**' to open that profile and open the drop down for **'General'**.
- Enable CRM as **'Yes'**.
- Scroll down to **'Save'** and then **'Close'**.
- Repeat this process on any profiles that will require the use of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



Appointments.

1.





2.

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.

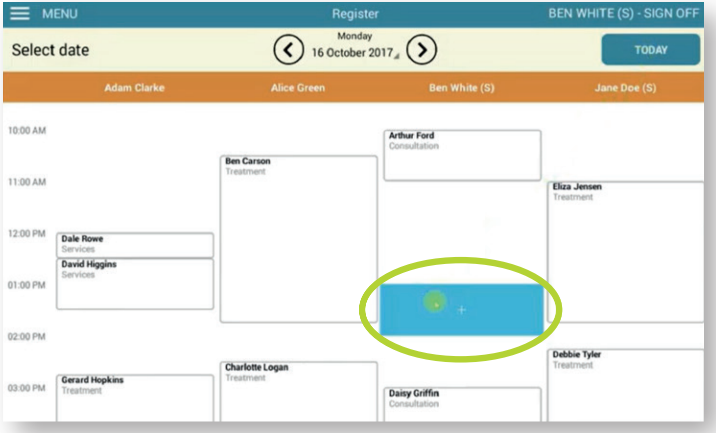
When selecting **'Calendar'** on the till – it will bring up today's Calendar and Appointments.

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

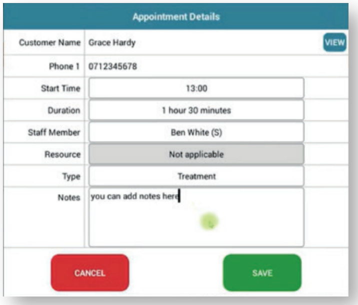
By default, it is set to Staff Members for appointment columns. To change, add a list – then select **'Config'** – **'Stores'** to use for your appointments, such as Table Numbers.

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'**.

1.



2.



Appointments.

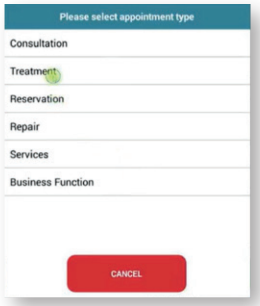
1. See Appointment Types, which are configured on the portal under **'Config'** – **'Lists'** and select **'Appointment Type'**.

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.

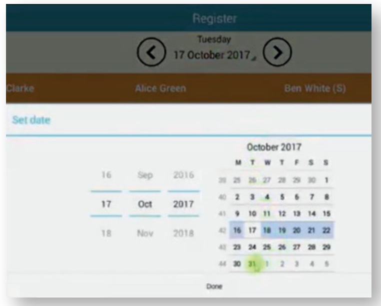
3. To amend any existing bookings, simply double click on the appointment to change the details.

1.

2.

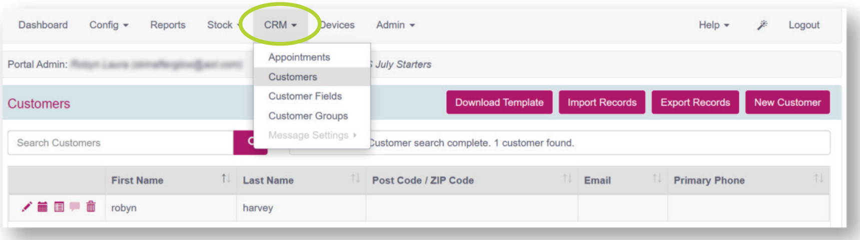


3.

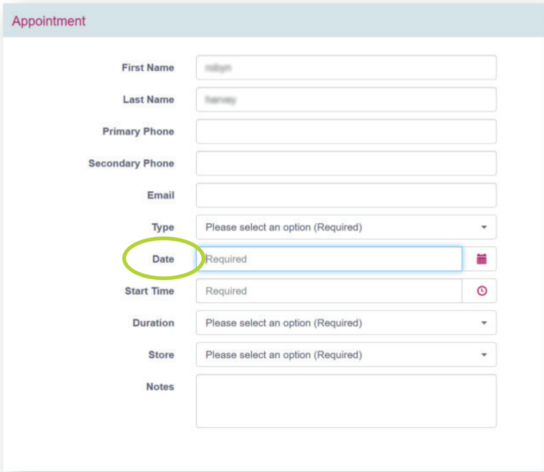


Appointments on the web portal.

1.



2.



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'**.

Customers

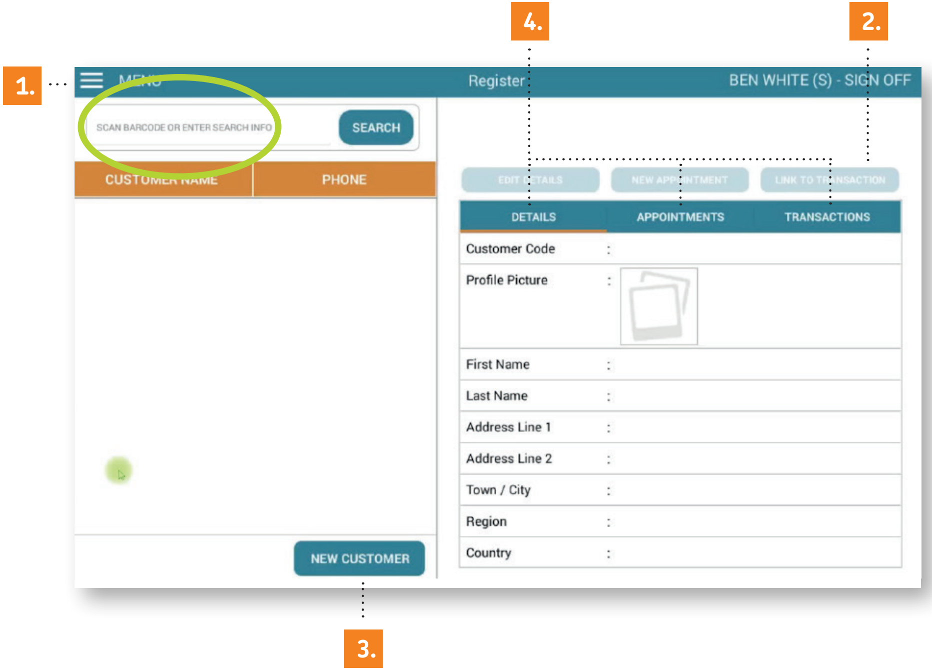
on the tPOS till system.

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.

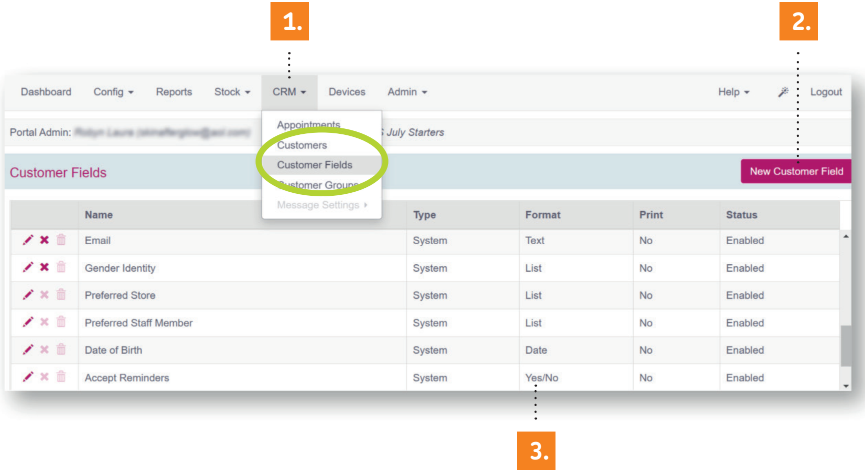


Customer Fields on the web portal.

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.

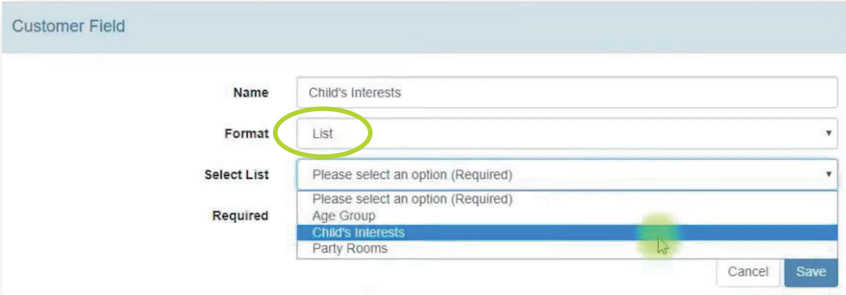


Customer Fields on the web portal.

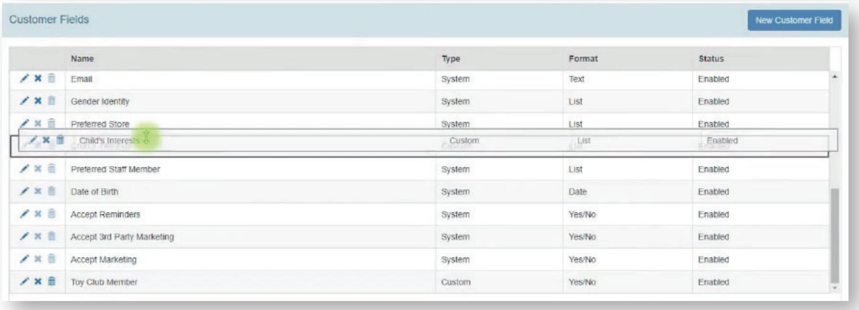
1. When adding a new Customer Field, you can select one of the lists created earlier to give you more information about your customer.

2. Simply hover over your Customer Field to drag it up or down to create a new order of Customer Fields.

1.



2.

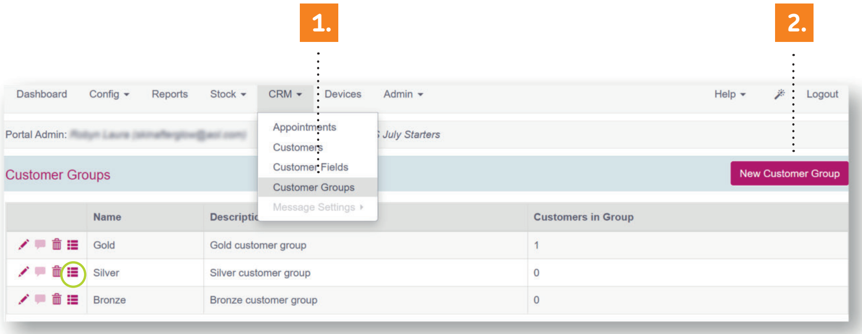


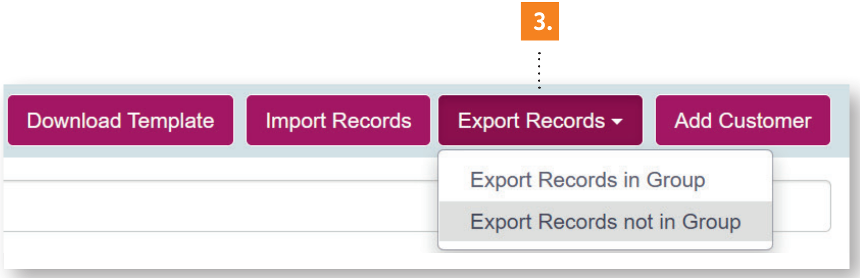
Customer Groups on the web portal.

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.

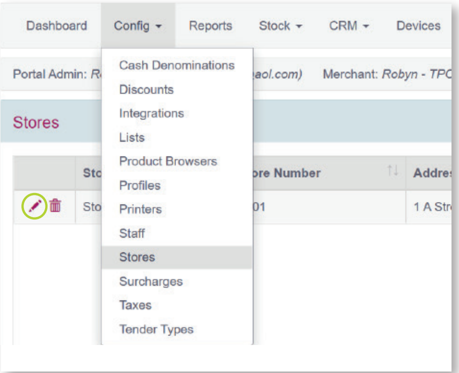




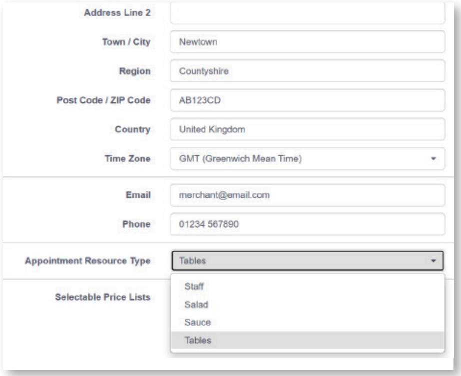
Stores on the web portal.

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.

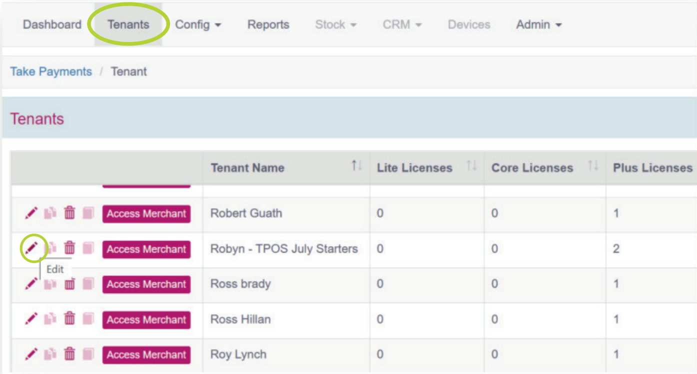
Text Message Reminders on the web portal.

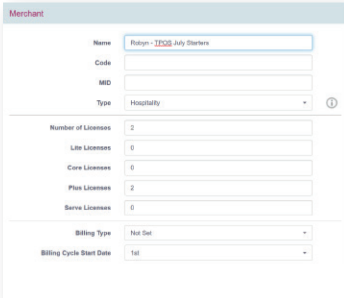
1. First, select **‘Tenants’** at the top and then click into the merchant’s name by selecting the **‘Pencil icon’**, to edit the their details.

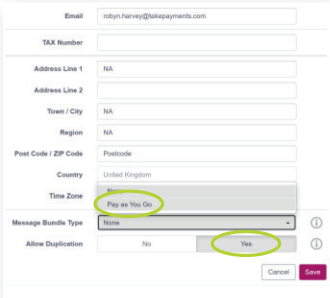
2. The merchant’s **t**POS details will now be displayed.

3. Scroll down to find **‘Message Bundle Type’** and change this to **‘Pay as You Go’**, then click **‘Yes’** to **‘Allow Duplication’**.

1.







2.

3.

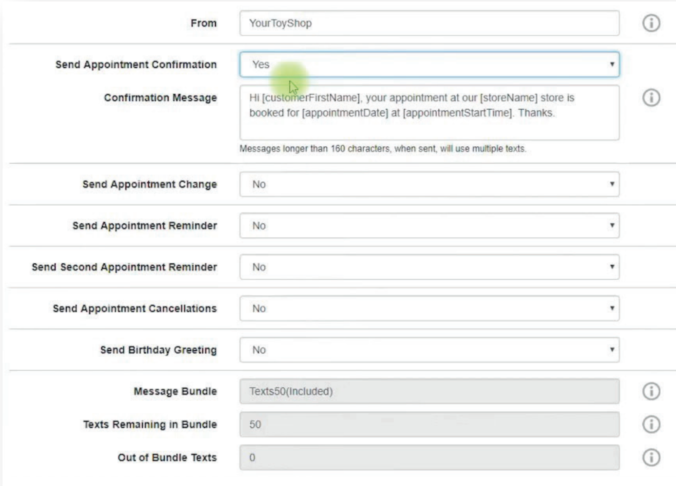
Text Message Reminders.

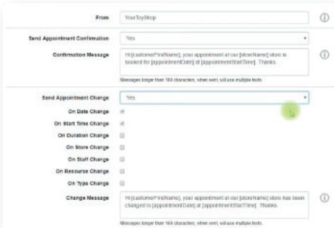
1. To configure your text, select **'CRM – Message Settings'**.

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.

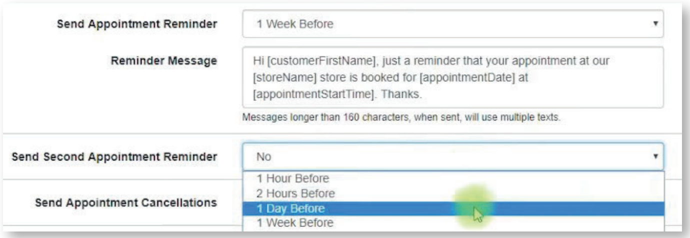
3. You can also decide if the customer receives a text when they have changed their appointment and select the time when they receive it. Now scroll down and press **'Save'**.

1.





2.



3.

Take charge of your business with tPOS.

Point of sale made easy.

Visit: takepayments.com/tpos

Trustpilot ★★★★★

Terms and Conditions apply.

*SMS charges will apply.

ΔKitchen Printer is available at an extra cost.

†Additional card machines must be approved by **take**payments' nominated provider of merchant acquiring services. Additional card machines must be supplied only by **take**payments 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 **take**payments for the processing of the card transactions. Under the contract with the acquiring bank, transaction charges and other fees will apply.

takepayments Limited is a company registered in England and Wales under company number 3102137. Registered office address: 4th Floor Highbank House, Exchange Street, Stockport, SK3 0ET. VAT number GB974978245. Authorised and regulated by the Financial Conduct Authority. Not all products are regulated by the Financial Conduct Authority; please contact us for more information.

takepayments Limited is officially licensed by Mastercard and Visa Europe as an Independent Sales Organisation and Member Service Provider, and works in association with a number of Merchant Acquirers. These acquirers undertake the processing of card transactions.

VISA mastercard maestro Pay G Pay Pay

takepayments
we make it easy