Outline

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01 Poynt
Hi there. We’re Poynt.

At Poynt we think all merchants (and merchant service providers) should have access to sophisticated technology, without compromising security or user experience.

So we built a new way to pay. An all-in-one smart terminal that accepts all of today’s payment types, and is future-proofed for tomorrow's too. MSR, EMV, NFC - the works.
02 Terminal Overview
Spec Sheet: Merchant Facing Screen

7” Touchscreen Display
800(w) x 1280(h) pixels tvdpi

- Microphone
- Hybrid EMV/MSR Reader Slot
- Merchant Facing Camera
- Volume Control
- Charging Pins
- Micro USB Port
- Speaker
- 8-Hour Battery
Spec Sheet: Customer Facing Screen

4.3” Touchscreen Display
800(w) x 480(h) pixels tvdpi

- Dedicated Secure Processor
- Power Button
- QR Code & Barcode Scanner
- Thermal Printer
- NFC Antenna (surrounds touch screen)
03 Product Demo
Demo

01 The Basics
02 Transactions
03 Settlements
The Basics

Getting started with the Poynt Smart Terminal
Hardware Setup: Placing your device

Poynt can be used wherever payments are happening.

It has two screens - the bigger one should face in toward the merchant, and the smaller is directed at customers.

Make sure it’s in a place with strong, private WiFi, or hook up the docking station to an Ethernet cable.
Hardware Setup: Powering your device

Every smart terminal comes with a power dock, to keep it fully charged. Simply plug in, then set your device on top. You can secure it to the counter by peeling off the plastic film from the bottom and placing it down carefully. But first make sure it’s faced the correct way.

To power-on, just press and hold the power button for about three seconds.

Don’t forget to fully charge your smart terminal to maximize its battery life.
Hardware Setup: Loading receipt paper

Each terminal comes with three rolls of thermal printer paper. To load the roll, make sure to insert it with the paper hanging down, as shown in the image.

The paper roll is 2 1/4" x 16'. You can buy additional rolls from various POS suppliers (example link below).

Need to order more?
Connecting to the Internet

The Poynt device needs the Internet to make its magic, and is designed to work with both old and new connection types.

**WiFi**

When it powers on for the first time, the device automatically asks you to connect to WiFi. You can manage your WiFi from “Settings” (just swipe down to access). Be sure to connect to a private and password-protected network (WPA or WPA2).

**Ethernet**

There’s an Ethernet port on the back of the power dock. To use it, the Poynt device must remain in its dock.
Accessing Swipe-down Menu

You can access the Poynt swipe-down menu by swiping down from the top of the screen. This also serves as the Notification tray where any notifications appear.

Some useful features you can access quickly are:

- Return to home screen
- Open terminal app
- Open register app
- Open help app
- Manage WiFi settings

If you swipe from left to right on the gray bar, there are additional useful features you can access:

- Access device settings
- Battery level
- Take a Bug Report
- Adjust brightness
List of Settings

1. **Business**: Displays business information associated with the terminal.
2. **Store**: Displays store information associated with the terminal.
3. **Payments**: Displays payment settings for the terminal including payment types, tip / receipt management, and saved transaction settings.
4. **Business Users**: Displays users associated with the device and their permissions. Add new terminal users (if logged in as an owner).
5. **Certifications**: Displays of Poynt FCC certification.
6. **Software Updates**: Manage the daily software maintenance window for software or firmware updates. Check if any updates are available for download.
7. **Accessories**: Display and management of connected accessories.
8. **About**: Terminal information including OS version, store device ID, device serial number, terminal name, firmware version, etc.
Help?

We know this is new technology, and you’ll probably have questions as you get up and running.

So we built “Help”, a handy app accessible from your home screen. Within you’ll find key resources to get the answers you need, including:

1. Tutorial Videos
2. Contact info for support
3. Guides/FAQs
4. A Feedback Forum for suggestions
5. Diagnostics for helping you troubleshoot
We know that it’s difficult for merchants to troubleshoot issues on their own, so we built a Diagnostic app. Place the terminal on the dock. The app will check the following:

- Connectivity
- Network latency
- Can reach Poynt servers
- Battery information
- Dock status
- Card reader connection
- Card reader keys
- Customer (second) screen touch

After running all diagnostics, a green checkmark will appear next to the areas that tested successfully and a red checkmark will appear next to areas that encountered issues. You can also run a Test Print from the upper right menu.

Note: Common issues during setup may include ensuring your Poynt terminal has proper internet connectivity; check your wifi and/or router setup. Contact support@poynt.com for questions.
Transactions

How to accept payments with Poynt
Terminal App

To start accepting credit card transactions, simply tap on the 'Terminal' app, enter the amount, and swipe the card. Customers can choose to have their receipt printed, emailed, SMS text messaged, or no receipt.

You can review a list of your transactions by tapping the 'Transactions’ icon. To return to the Terminal app, tap on the left-menu and tap 'Terminal.’
Credit Card

1. Enter the amount on the Terminal app and tap ‘CHARGE’.

2. Insert the card fully into the slot and wait for the authorization confirmation. Remove when instructed.

3. Upon confirmation of the payment, the customer will be prompted to enter a tip amount and/or on-screen signature (if these setting are enabled).

4. Customers can then choose to have an email, paper, SMS Text, or No receipt.

5. Boom. The transaction is complete.

* Separate menu option for manual entry transactions.
Credit Card Transaction: Customer Screen

Upon confirmation of the payment, the customer will be prompted to enter a tip amount and/or on-screen signature (if these setting are enabled).

Customers can then choose to have an email receipt, paper receipt, or no receipt.

Boom. The transaction is complete.
1. Enter the amount on the Terminal app and tap ‘CHARGE’.

2. Customer should activate their mobile wallet and hold it near the screen.

3. Upon confirmation of the payment method, the customer will be prompted to enter a tip amount and/or on-screen signature (if these settings are enabled).

4. Customers can then choose to have an email, paper, SMS Text, or No receipt.

5. Hurray. The transaction is complete.
Cash Transaction

For merchants who have connected a cash drawer and/or want to track cash transactions.

1. Enter the amount on the terminal app and tap ‘CASH’.

2. Enter the amount of cash received using keypad or shortcut keys which shows common bills, and then tap ‘COMPLETE’.

3. Customers can then choose to have an email, paper, SMS Text, or No receipt.

4. Success. The transaction is complete.
More Payment Options - Check

You can mark/annotate transactions as having been processed/paid via alternate Payment tender types.

1. Tap on the Terminal app and type in the exact amount of the sale
2. Tap ‘CHARGE’ in the terminal screen so the payment window pops up. Then, tap the drop-down menu in the top right corner to access more payment options
3. A sub-menu window will open. Select the option labeled ‘CHECK’.
4. Enter notes, follow additional prompts, and finish the transaction by selecting ‘DONE’

*Suggestion:* type in the Customer’s Check Number in the Notes field for tracking purposes. The notes will appear in the merchant’s Transaction Report.
More Payment Options - Other

For tracking transactions paid by Other payment tender types, such as Gift Cards, Vouchers, Store Credit, etc:

1. Tap on the Terminal app and type in the exact amount of the sale
2. Tap ‘CHARGE’ in the terminal screen so the payment window pops up. Then, tap the drop-down menu in the top right corner to access more payment options
3. A sub-menu window will open. Select the option labeled ‘OTHER’.
4. Enter notes, follow additional prompts, and finish the transaction by selecting ‘DONE’
Refunds

To refund a previous transaction, tap the Terminal menu (left side) > and go to Transactions list. You can swipe a transaction row to the left for a shortcut to Refunds. When you pull up a specific transaction, tap "Refund". You’ll be asked to confirm your refund amount. If you need to enter a Partial Refund amount, tap the amount to edit.

Note: Non referenced refunds is available as an owner-permissioned feature.
Manual Entry - App

We also support manual entry for phone orders and other remote orders. Enter the information prompted.

Note: Manual Entry App is available for certain merchant configurations depending on processor.
Manual Entry - Terminal App Option

Merchants can also process Manual Entry transactions directly from the Terminal App.

1. Open the Terminal app and type in the exact amount of the sale
2. Tap ‘CHARGE’ in the terminal screen so the payment window pops up. Then, tap the drop-down menu in the top right corner to access more payment options
3. A sub-menu window will open. Select the option labeled ‘MANUAL ENTRY’.
4. Enter notes, follow additional prompts, and finish the transaction by selecting ‘DONE’

Note: Manual Entry via Terminal App form is available for certain merchant configurations depending on processor.
Auth-only transactions are used by merchants who want to place an authorization hold on a customer’s credit card but are not yet ready to capture/settle funds for that transaction. For retail merchants, this type of transaction might be applicable if an item is out of stock and is delayed in shipment.

When the item is in stock, the merchant can then capture/settle the transaction (ie charge the card at that time) by going to the Auth-Only tab in Settlements App and marking the auth-only transaction to ‘Add to Batch’.

1. Go to Terminal App
2. Tap on left side drop-down menu
3. Tap on “AUTH-ONLY” option
4. Enter the amount and swipe/insert card as you normally would
5. When an 'Auth-Only' transaction is ready to be captured/closed, you may do so by going to the Settlements App > Transactions > Auth-Only tab and mark the transaction as Closed

Note: Auth-Only option is available to certain merchant configurations.
Non-referenced Refund

For merchants who need to process a refund / credit to a customer’s card but cannot find the transaction in the Transaction List, a non-referenced refund can be performed. It works similar to a refund transaction.

1. Go to Terminal App and tap on left drop-down menu
2. Tap on the "NON-REF REFUND" option
3. Enter the amount and tap on the "REFUND" button and swipe/insert card as you normally would

(Allows merchants to issue a refund directly to a customer’s credit card without a prior referenced captured transaction.)

**Note:** Non-reference Refunds is an Owner-permission feature; only terminal users with an 'Owner' profile will see this option.
Multi-Tender

For merchants who have customers who want to split payments into 2 or more payments, you can use the Multi-Tender option to process additional payments.

1. Open the Terminal app and type in the exact amount of the sale
2. Tap ‘CHARGE’ in the terminal screen so the payment window pops up. Then, tap the drop-down menu in the top right corner to access more payment options
3. A sub-menu window will open. Select the option labeled ‘MANUAL ENTRY’.
4. The payment will automatically split into two equal-amount transactions; if necessary, tap on the amount to edit amounts of each split transaction.
5. Tap on arrow to proceed with payment with the first transaction. When complete, the first transaction will show a checkmark. Tap on arrow to proceed to the next transaction.

Note that these split payments will appear separately in the Transactions List.
Add Notes - Option 1: You can enter custom notes or instructions for an order by accessing this option in the 3-dot menu located at the top right corner of the screen. Then proceed to enter amount to be charged.

Add Notes - Option 2: You can enter custom notes by tapping on the ‘NOTES’ tab after entering the amount to be charged.

For both options, Custom Notes will appear on the Notes tab for the completed Transaction Details and in Transaction Reports when you generate reports for the day(s) you select.
Menu Options - Print Last Receipt & Receipt Shortcut

1. Go to Terminal App > Transactions List or

2. Go to Transaction List and swipe left on a transaction record. Tap on “Receipt” shortcut button to print.

3. OR From the Terminal App right-hand drop-down menu select "Print Last Receipt".

The terminal will print the receipt of the last transaction processed.

Note: Print Last Receipt only works if you remain in Terminal App. If you exit Terminal App then Print Last Receipt will not have stored the last transaction in session memory.
Settlements

How to settle transactions with Poynt
Settlements

Refer to the Help Center support.poynt.com for guides on How to Settle

1. Tap the Settlements app from the Home / Launcher screen.
2. You will see the following options:
   a. "Settle" allows you to review a Settlement Summary of transactions in the Open Batch.
   b. "Transactions" allows you to view a detailed list of transactions in the Open Batch and/or Auth-Only transactions.
   c. "Batch History" allows you to view previously generated Settlement Reports.
   d. “Reports” allows you to generate and view reports on your terminal.
3. Additional features:
   a. Web: In addition to Settlements on the terminal, merchants can access Settlements via the web at poynt.net/settlements
   b. Auto: Merchants can also set up an auto-settlement time by going to poynt.net > Business > Business Settings
   c. Report notification: Merchants can also set up a Reporting contact to be emailed when reports are ready to be viewed
Settlements - Summary

1. Tap on Settle to review a Settlement Summary of transactions currently in the Open Batch.
2. You will see summary amounts for Sales, Tips (if applicable), and Refunds (if any).
3. If you have any Transactions Pending Tips and/or Auth-Only transactions, you will see an option to Review Transactions.
4. After reviewing the summary and/or Transaction details, and if you are ready, then tap on “Settle Open Batch”
Settlements - Review Transactions

1. Tap on Transactions or Review Transactions to view a detailed list of transactions in your Open Batch, Pending Tips, and/or in Auth-Only status. You will see tabs for "Open Batch", "Pending Tips", and/or "Auth-Only" (if applicable).

2. If you need to adjust transactions for Tips, tap on Pending Tips > Edit > Enter Tip Amount > Add to Batch.

3. If you have any Auth-Only transactions you are ready to post, tap on Auth Only > Add to Batch.

4. You can also Void transactions. When ready, tap on ‘Review’ to go back to Summary screen and tap Settle Open Batch.
Settlements - Settlement Report & Batch History

1. Once you tap on “Settle Open Batch”, you’ll see a generated Settlement Report. You can access the same report by logging into your poynt.net account > Sales & Reports > Reports for the report in html, pdf, or excel formats.

2. At any time on your terminal, you can view your Batch History and review any Settlement Reports which were previously generated.
04 Poynt HQ for Merchants

A portal for managing your business - poynt.net
Poynt HQ: About

Poynt HQ (poynt.net) is a web portal that allows merchants to:

1. View sales and transactions
2. Add additional web or terminal users
3. Generate reports
4. View / set Business Setting
5. Upload custom background images for the Poynt terminal
6. Set up Product Catalog for Register App

Every new merchant is sent a web invitation email prompting them to set-up an account in Poynt HQ. Simply click on the link to create a password.
Poynt HQ: Dashboard

Dashboard allows merchants to understand their business, including unique visitors, sales, and transactions. On the light blue bar, they can also select the desired time range to get the full picture.
Poynt HQ: Transactions

Transactions gives your merchants a full view into every detail of their business. This includes customer names, transaction ID, and amount.

With the search bar they can also locate specific transactions by ID, customer name, last 4 digits, etc. If they click on the transaction ID, merchants can see the transaction information or email a receipt to a customer.

Clicking on Details button will show the transaction history details.

Clicking on Receipt will allow merchants to re-email receipts to customers.
Poynt HQ: Settlements

Merchants can settle via the web with the same functions they have on the Poynt terminal.

- View Summary amounts for Sales, Tips (if applicable), and Refunds (if any) and by card type.
- If you need to adjust transactions for Tips, click Pending Tips tab > Enter Tip Amount > Add to Batch.
- If you have any Auth-Only transactions you are ready to post, click Auth Only tab > Add to Batch.
- You can also Void transactions.
- When ready, click on “Settle Open Batch”.

For merchants with multiple terminals, you can also Settle All Terminals at once or choose individual terminals to settle.
This report allows merchants to manage their business. Merchants can choose to generate daily or supply a date range.

Reports contain all information on Cash Purchases, Card Purchases, Cash Refunds, Card Refunds, Canceled Purchases, Declined Purchases, Breakdowns, Custom Notes, and Employees.

Reports can be exported into HTML, PDF, or to Excel. Previously generated reports are always available on Poynt.net.
This report allows merchants to generate reports for specific Terminal Users (commonly referred to as “Clerk/Server” Reports). Reports contain all information on Cash Purchases, Card Purchases, Cash Refunds, Card Refunds, Canceled Purchases, Declined Purchases, Breakdowns - by the specific Employee. Reports can be exported into HTML, PDF, or to Excel. Previously generated reports are always available on Poynt.net.
Poynt HQ: Settlement Reports

Merchants can view Settlement reports, which provides all credit card transactions that were processed. The purpose of this report is to provide you with information on which credit card transactions have been settled.

Reports can be exported into HTML, PDF, or to Excel. Previously generated reports are always available on Poynt.net.
Poynt HQ: Item Sales Reports

Merchants who have set up Product Catalog and use Poynt Register App can also generate Item Sales Reports. Information includes:
- Top items sold
- Items in Completed, Open, and Cancelled Orders

Reports can be exported into HTML, PDF, or to Excel. Previously generated reports are always available on Poynt.net.
Merchants can now easily manage their Business Settings per store location. When you log in to your Poynt.net account, click on the “Business” tab.

From this page, you can:

1. **Manage Business settings** – Update your business contact information.
2. **Manage Store settings** – If you have more than one store location, you can manage multiple stores from your Business account login. From store settings, you can edit the Store contact information, update Payment settings, apply Custom Background images, and create Custom Receipt text.
3. **Manage Terminal settings** – If you have more than one terminal, you can manage the product catalog assigned to each terminal.

Continue on to the next pages for additional information on each of the settings options.
Poynt HQ: Manage Business Settings

Poynt.net > Business > Manage Business

Merchants can edit the Business contact information for the Poynt account. In addition, merchants can opt to set up:

- Reporting Notification alerts to be emailed
- Poynt HQ Mobile App alerts for Reports and/or Transactions
Poynt HQ: Manage Store Settings

Poynt.net > Business > Manage Store

Merchants can edit Store contact information for each store location. This is the Name, Address info that appears on receipts.

In addition, Manage Store allows the merchant the ability to:

- Configure Payment Settings
- Upload custom Background images for both Merchant and Customer screens
- Customize transaction receipt text for both printed and emailed receipts
Poynt HQ: Configure Payment Settings

Poynt.net > Business > Manage Store > Payment Settings

- **Ask for tips**: Enable tips so that customers are prompted to add tip after swiping their card.
- **Skip sig below $**: Don’t require a signature when transaction is below this amount.
- **Auto-settlement**: You can specify a set time every evening/day at which batch settlements will occur. You can always manually batch settle, but enabling auto-settlements allows you the convenience of not having to manually settle every day.
You can customize the background images for both of your Poynt screens. You can upload either jpg or png image files.
# Poynt HQ: Customize Transaction Receipts

## Poynt.net > Business > Manage Store > Txn receipts

You can specify custom receipt text for both your printed and email receipts.

- **Receipt footer:** Text that is typed here will appear in the footer of both printed and emailed receipts.

- **Email receipt options:** In addition, you can specify the following optional fields of information to appear on the customer’s emailed receipt:
  - Business / Open hours
  - Store website link
  - Social media links: Facebook, Twitter, Yelp

## Manage store: Poynt Store 1

<table>
<thead>
<tr>
<th>Basic info</th>
<th>Payment settings</th>
<th>Device screens</th>
<th>Login settings</th>
<th>Tax receipts</th>
</tr>
</thead>
</table>

### Receipt footer
- Show your receipt for a free coffee on your next visit. Expires 9/1/16. Thanks for stopping by!

**The following will only appear on the email receipt:**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open hours</td>
<td>e.g. Mon-Fri 9am-5pm Sat 11am-5pm Sun Closed</td>
</tr>
<tr>
<td>Website link</td>
<td><a href="http://poynt.com">http://poynt.com</a></td>
</tr>
<tr>
<td>Facebook link</td>
<td><a href="http://facebook.com/poynt">http://facebook.com/poynt</a></td>
</tr>
<tr>
<td>Twitter link</td>
<td><a href="http://twitter.com/poynt">http://twitter.com/poynt</a></td>
</tr>
<tr>
<td>Yelp link</td>
<td>e.g. <a href="http://www.yelp.com/biz/yelp">http://www.yelp.com/biz/yelp</a></td>
</tr>
</tbody>
</table>

### Email receipt
- Thank you!
- Poynt Test Business
- 123 Street Name, Suite Number, City, State 12345
- (123) 456-7891 x2380
- [http://poynt.com](http://poynt.com)
- [Facebook](http://facebook.com/poynt)
- [Twitter](http://twitter.com/poynt)
- Show your receipt for a free coffee on your next visit. Expires 9/1/16. Thanks for stopping by!

### Paper receipt
- TOTAL: $8.00
- Thank you!
- Show your receipt for a free coffee on your next visit. Expires 9/1/16. Thanks for stopping by!
Poynt HQ: Manage Terminal Settings

Poynt.net > Business > Manage Terminal

Merchants can edit Terminal information in each store location. You can rename terminals to help you identify specific terminals if you have more than one Poynt (eg “Take-out counter”, “Back office”, etc).

In addition, you can assign Product Catalogs to specific Poynt terminals (eg Take-out counter terminal is assigned the Take-out Menu catalog and Back office terminal is assigned the Catering Menu catalog).