



Poynt Lodging App

Merchant Guide - Version 2.0

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Document Revision History

Revision	Date	Changes / Notes
0.1	12/2/16	Draft
1.0	12/8/16	Published on Help Center
2.0	4/17/17	Updated with additional functionality supporting: <ul style="list-style-type: none">- Add Room Charges- Auth-Only- Verify Card (\$0 Auth)

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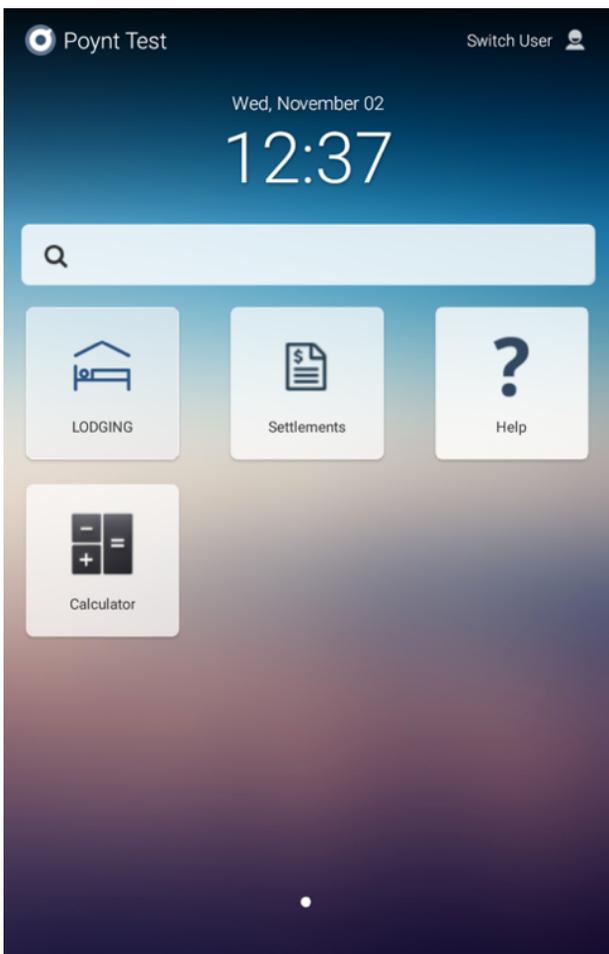
Overview

Welcome to the Poynt Lodging App Merchant Guide! This document will help you learn about the functionality and features within the Poynt Lodging solution.

Launcher

The Poynt Launcher screen serves as your Home screen. From here, you can access the available apps to help run your business. Your Poynt Terminal includes:

- Lodging App:
 - o Allows you to perform all transaction types for your lodging business
- Settlements App
 - o Allows you to review transactions in your Settlement batch and Close out your batch for settlement
 - o Allows you to manage old Check-In's and purge (void) those transactions
- Help App
 - o Allows you to review FAQs for common scenarios
 - o Allows you to access the Diagnostics App for troubleshooting
- Calculator
 - o Allows you to have quick access to calculator

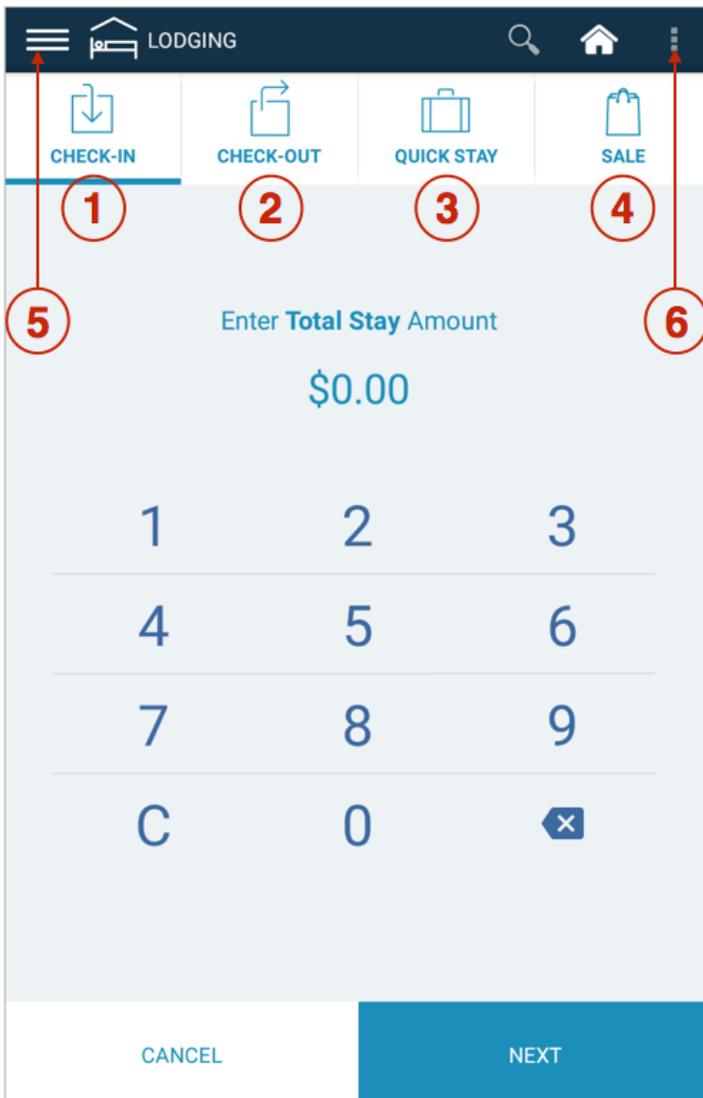


Lodging App

Once you tap on the Lodging App icon, you will land on the Lodging App main screen. By default, the Check-In screen will be your main screen. You will see additional tabs to allow easy access to other main functionality.

From this screen, you can:

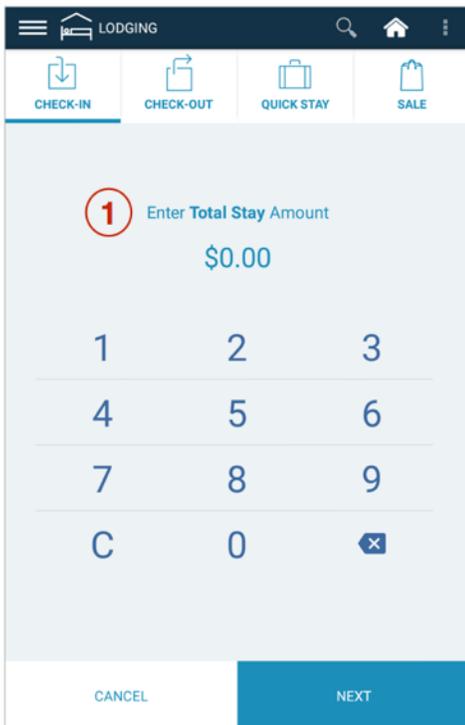
1. Begin a **Check-In** transaction
2. Tap on **Check-Out** to begin a Check-Out transaction
3. Tap on **Quick Stay** to begin a Quick Stay transaction
 - A **Quick Stay** transaction defaults the check-in date to the current date, allows the clerk to set the check-out date, and then immediately charges the customers card and places the Quick Stay transaction in the current day's Settlement batch.
4. Tap on **Sale** to begin other types of transactions (see Sale section)
5. Tap on left-navigation menu to access Transactions List
6. Tap on right-navigation menu to access Non-Reference Refund (owner-permission only)



Lodging – Check-In transaction

For Check-In transactions, the customer's card will be authorized for the Total Stay Amount entered in. The authorization is placed on the customer's card until the customer is ready to Check-Out. On the day of Check-Out, the lodging clerk would complete the Check-Out flow to capture the authorization held on the customer's card. The Checked-Out transaction is then placed in the current day's Open Settlement Batch until the batch is submitted and closed later that day by the lodging clerk/manager.

1. To begin a **Check-In** transaction that will Check Out at a later date, tap in the **Total Stay Amount**. Tap Next.
2. Continue by tapping in the Check-In date. Tap Next.
3. Then tap the Check-Out date. Tap Next.



LODGING

CHECK-IN CHECK-OUT QUICK STAY SALE

1 Enter Total Stay Amount

\$0.00

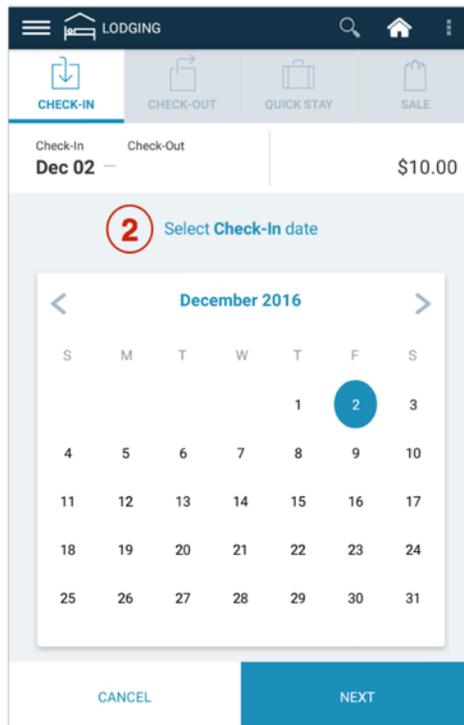
1 2 3

4 5 6

7 8 9

C 0 X

CANCEL NEXT



LODGING

CHECK-IN CHECK-OUT QUICK STAY SALE

Check-In Check-Out

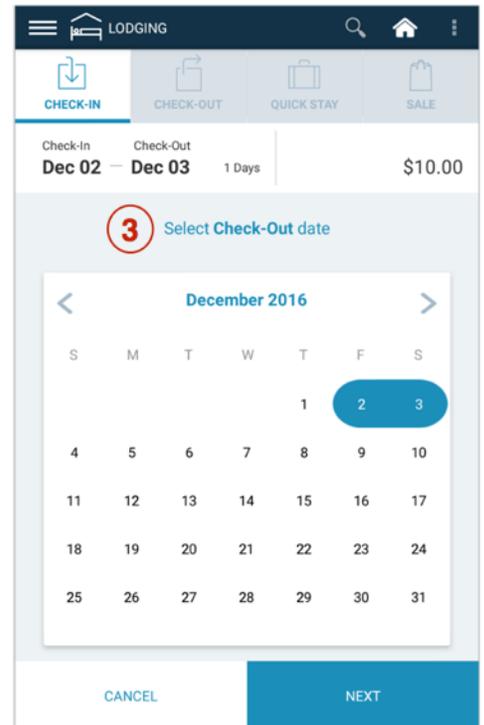
Dec 02 — \$10.00

2 Select Check-In date

December 2016

S	M	T	W	T	F	S
				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

CANCEL NEXT



LODGING

CHECK-IN CHECK-OUT QUICK STAY SALE

Check-In Check-Out

Dec 02 — Dec 03 1 Days \$10.00

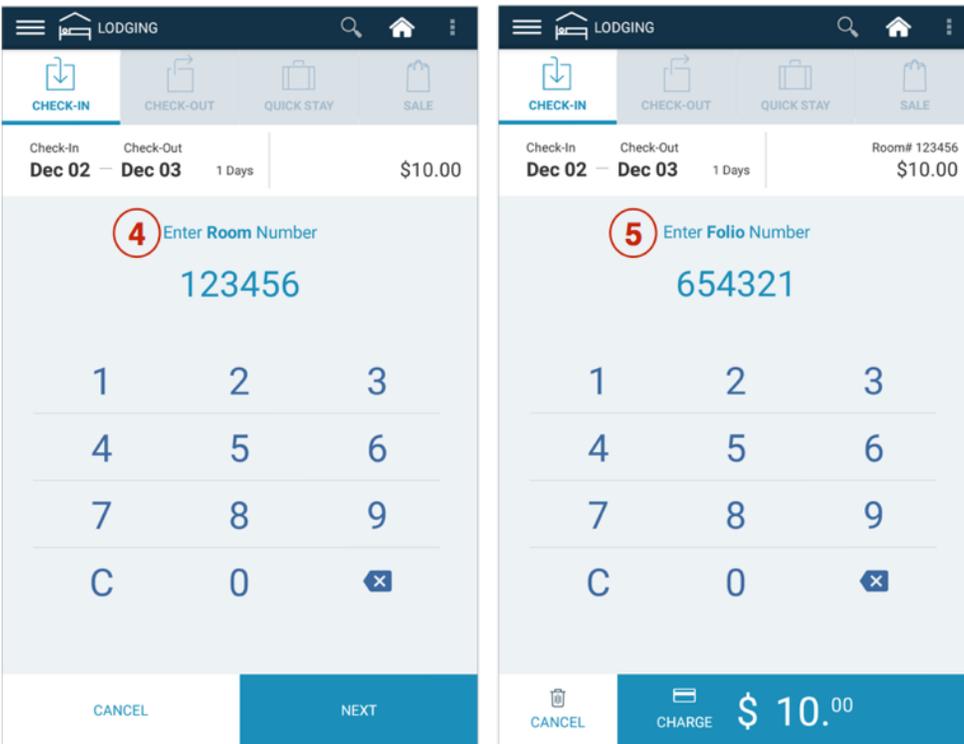
3 Select Check-Out date

December 2016

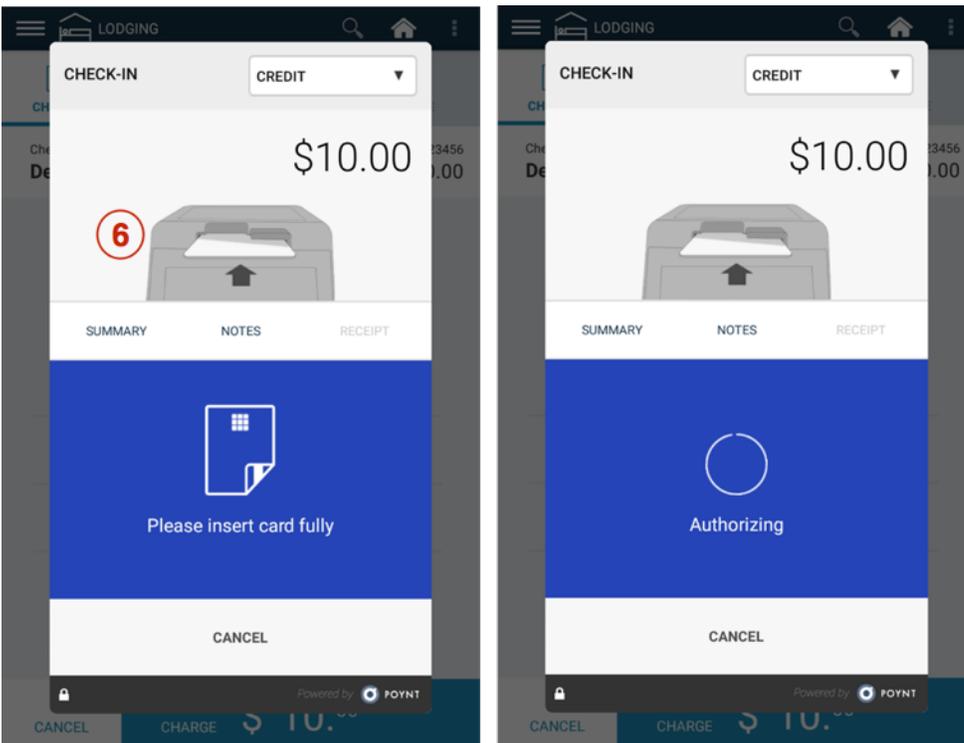
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

CANCEL NEXT

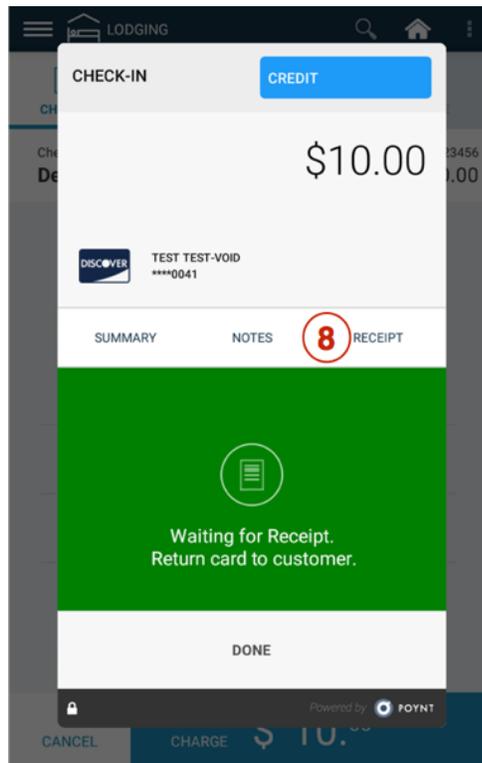
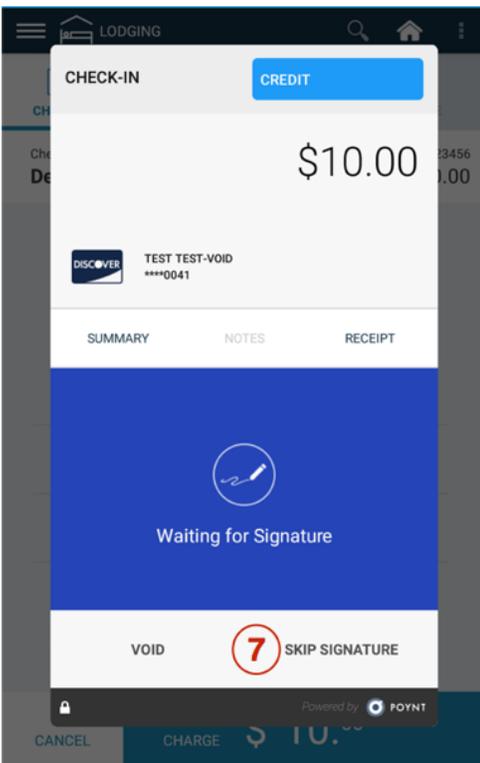
4. Enter the **Room Number** for the guest. Tap Next.
5. Enter the **Folio Number** for the stay. Tap Next.
 - a. *Note: Folio Number is an optional Lodging setting that can be disabled in the Poynt.net HQ web portal > Store Settings > Lodging Settings tab.*



6. Insert / Swipe Card or Tap NFC for Payment. Wait for the card authorization.



7. Wait for the customer signature on the customer screen.
 - a. Option: You can also choose to skip this step and obtain signature on the printed receipt. Tap 'Skip Signature' to proceed to Receipt screen.
8. Wait for customer receipt selection (email, paper, none or text).
 - a. Option: You can also print out a receipt by tapping on the 'Receipt' tab.



Lodging – Check-Out transaction

When a guest is ready to Check Out, go to the Check-Out tab to begin the process for capturing the authorized Checked-In and placing that Checked-Out transaction in the current day's Open Settlement Batch which will be submitted and closed later that day by the lodging clerk/manager.

1. Tap on **Check-Out** tab. Enter the **Room Number**. Tap Next.

The first screenshot shows the 'CHECK-OUT' tab selected. A red circle with the number '1' is next to the text 'Enter Room Number'. The number '0' is entered in the input field. Below the input field is a numeric keypad with digits 1-9, 'C', '0', and a clear button. At the bottom are 'CANCEL' and 'NEXT' buttons.

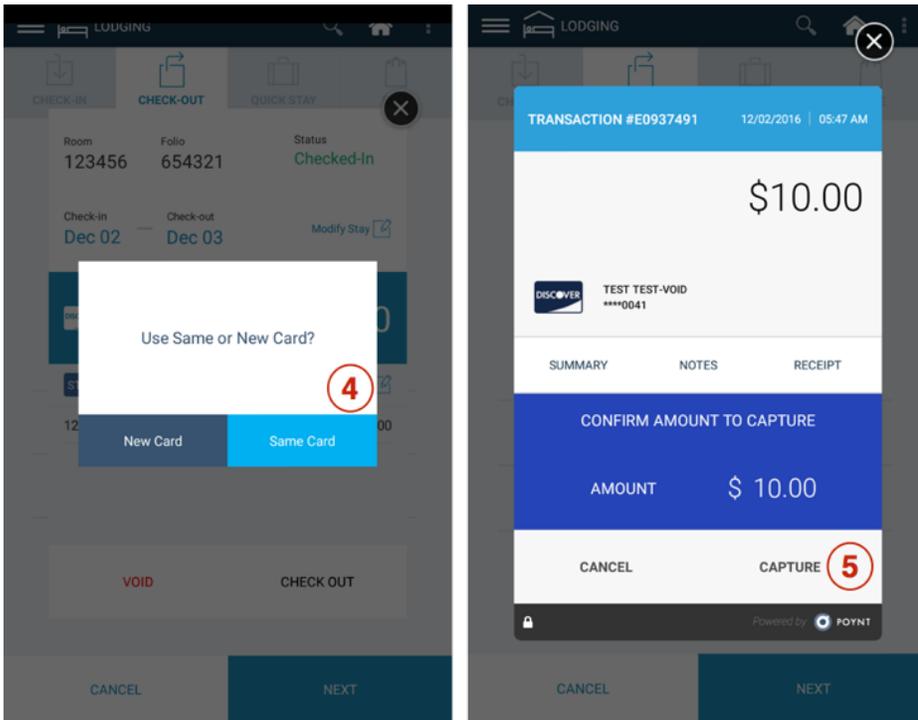
The second screenshot shows the same screen with the number '123456' entered in the input field.

2. A pop-up window will appear. Confirm by tapping on the correct record to Check Out.
3. Review the details of the Checked-In Stay (eg Room Number, Folio Number, dates of Check-In/Out, amounts, last 4 digits of card, etc). Tap on **Check Out** to proceed.

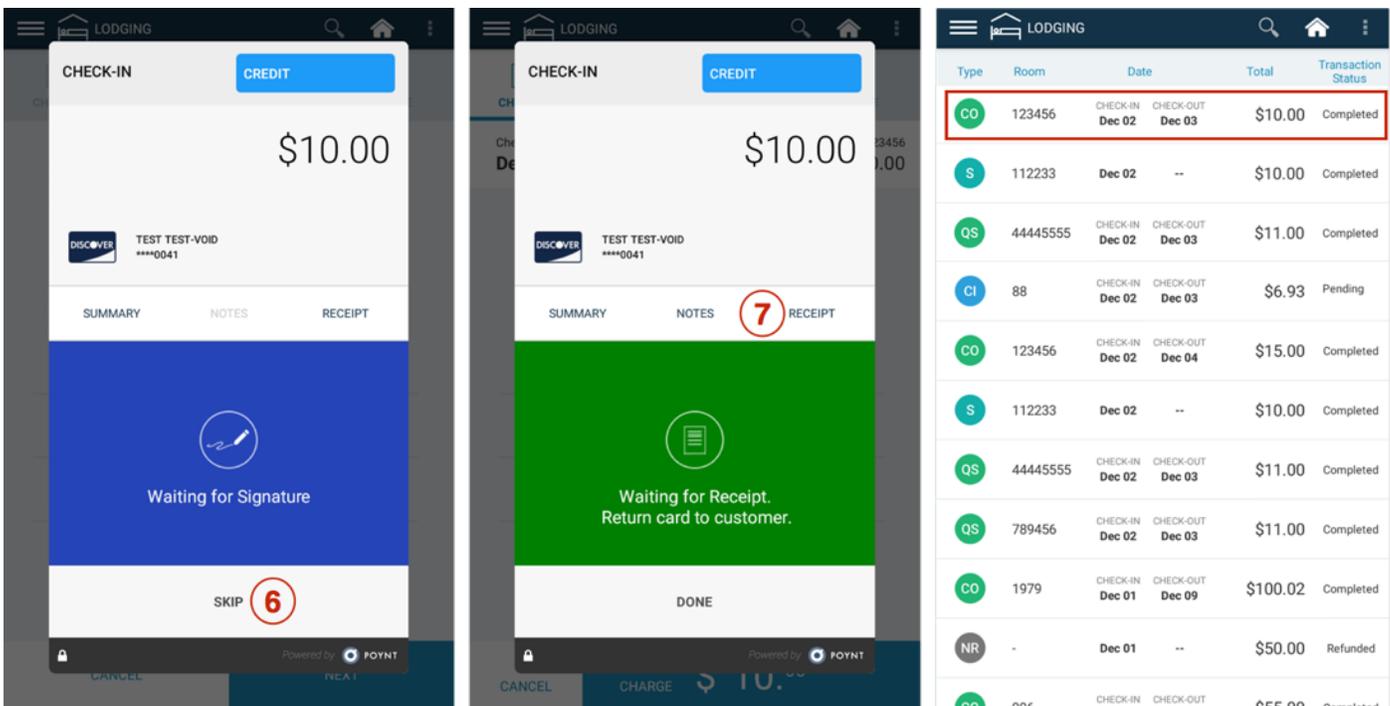
The first screenshot shows a pop-up window titled 'Room' with the text 'Select record to check out'. A red circle with the number '2' is next to a record: 'Dec 02 05:45 AM - Dec 03 - 0041 \$10.00'. The background shows the 'CHECK-OUT' screen with a numeric keypad and 'CANCEL' and 'NEXT' buttons.

The second screenshot shows the details of the selected record. It includes: Room 123456, Folio 654321, Status Checked-In, Check-in Dec 02, Check-out Dec 03, and a 'Modify Stay' link. Below this is a card for 'TEST TEST-VOID 0041' with a balance of '\$10.00'. There are tabs for 'STAY DETAILS' and 'SALE DETAILS', and an 'Add Charges' button. At the bottom, there is a 'VOID' button and a 'CHECK OUT' button with a red circle and the number '3'. The background shows the 'CHECK-OUT' screen with a numeric keypad and 'CANCEL' and 'NEXT' buttons.

4. Confirm with guest whether to Check Out using the **Same Card** as the Check In. Tap **Same Card** to proceed.
5. Review the amount to capture for the Check-Out. Tap on **Capture** to proceed.



6. Wait for the customer signature on the customer screen.
 - a. Option: You can also choose to skip this step and obtain signature on the printed receipt. Tap 'Skip' to proceed to Receipt screen.
7. Wait for customer receipt selection (email, paper, none or text).
 - a. Option: You can also print out a receipt by tapping on the 'Receipt' tab.
8. You can see the Check-Out record with the 'Completed' Transaction Status in the Details List.



Lodging – Quick Stay transaction

For **Quick Stay** transactions, the customer's card will be authorized for the Total Stay Amount and be immediately captured and placed in the current day's Open Settlement Batch until the batch is submitted and closed later that day by the lodging clerk/manager. **Quick Stay** allows you to charge the guest up front for the entire stay regardless of whether the guest checks out at a later date.

1. To begin a **Quick Stay** transaction, which will capture funds on the same day, tap on the **Quick Stay** tab. Enter the **Total Stay Amount**. Tap Next.
2. By default, a Quick Stay's Check-In Date is set to the current date. Continue by tapping in the **Check-Out** date. Tap Next.

The first screenshot shows the 'LODGING' screen with the 'QUICK STAY' tab selected. A red circle with the number '1' is next to the instruction 'Enter Total Stay Amount'. The amount '\$11.00' is displayed. Below is a numeric keypad with digits 1-9, 0, and a clear button (C). At the bottom are 'CANCEL' and 'NEXT' buttons.

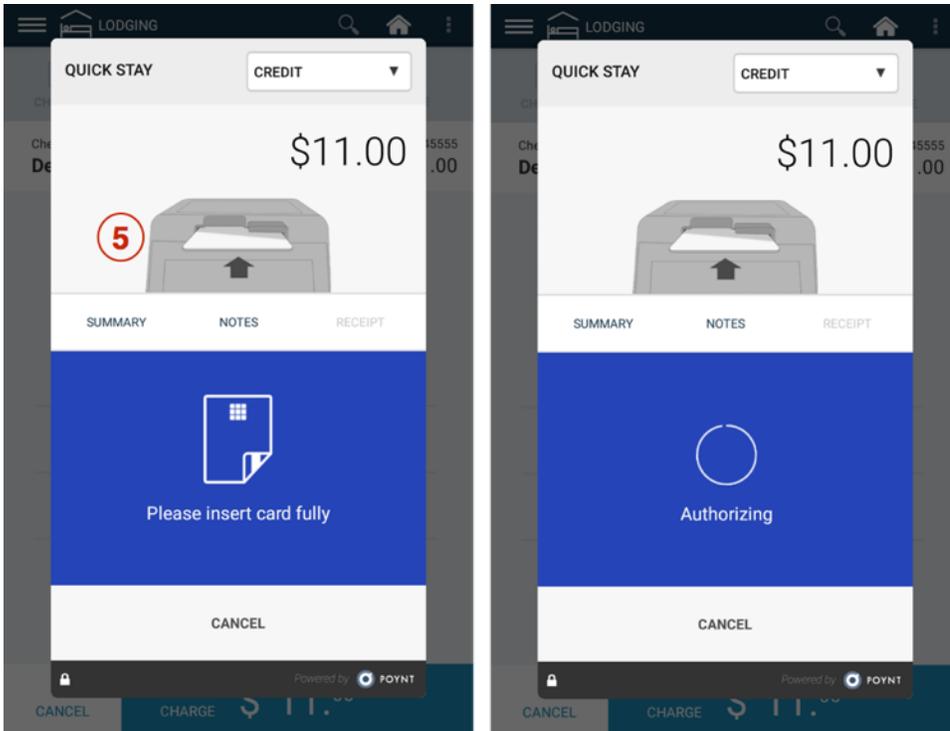
The second screenshot shows the same screen with a red circle with the number '2' next to the instruction 'Select Check-Out date'. A calendar for 'December 2016' is displayed, with the date '3' selected. The 'CHECK-OUT' date is 'Dec 03' and the total is '\$11.00'. At the bottom are 'CANCEL' and 'NEXT' buttons.

3. Enter the **Room Number** for the guest. Tap Next.
4. Enter the **Folio Number** for the stay. Tap Next.
 - a. *Note: Folio Number is an optional Lodging setting that can be disabled in the Poynt.net HQ web portal > Store Settings > Lodging Settings tab.*

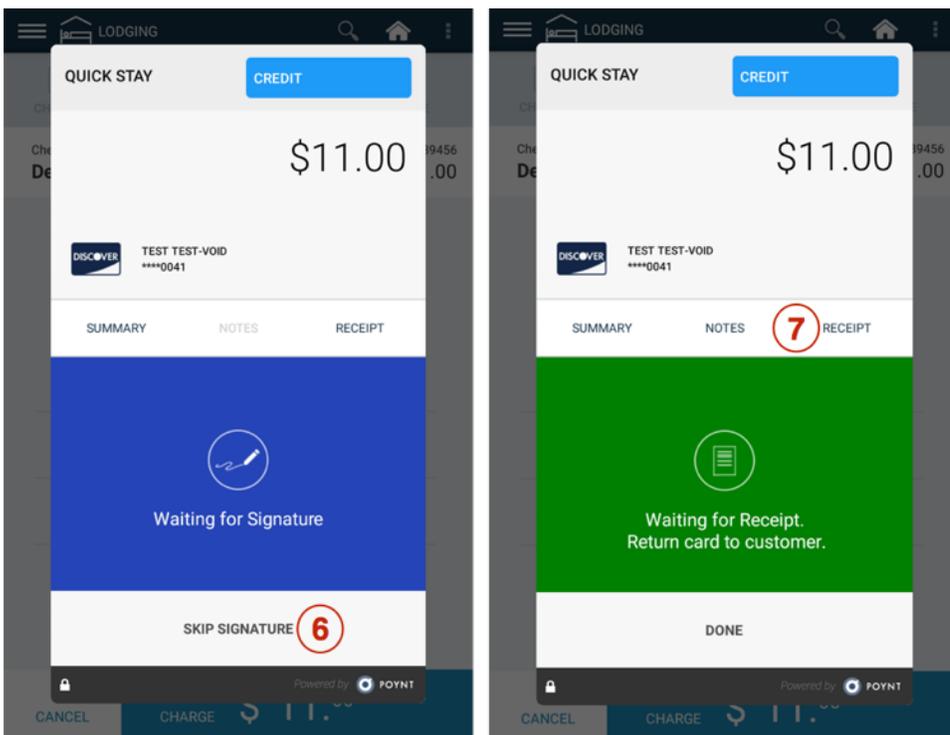
The third screenshot shows the 'LODGING' screen with the 'QUICK STAY' tab selected. A red circle with the number '3' is next to the instruction 'Enter Room Number'. The room number '123456' is displayed. Below is a numeric keypad with digits 1-9, 0, and a clear button (C). At the bottom are 'CANCEL' and 'NEXT' buttons.

The fourth screenshot shows the same screen with a red circle with the number '4' next to the instruction 'Enter Folio Number'. The folio number '123456' is displayed. Below is a numeric keypad with digits 1-9, 0, and a clear button (C). At the bottom are 'CANCEL' and 'NEXT' buttons.

5. Insert / Swipe Card or Tap NFC for Payment. Wait for the card authorization.



6. Wait for the customer signature on the customer screen.
a. Option: You can also choose to skip this step and obtain signature on the printed receipt. Tap 'Skip Signature' to proceed to Receipt screen.
7. Wait for customer receipt selection (email, paper, none or text).
a. Option: You can also print out a receipt by tapping on the 'Receipt' tab.



Lodging – Sale transaction

At times, you may need to process transactions which are not Check-In, Check-Out, or Quick Stay. For all of these other transactions, use the **Sale** tab. You will be prompted to select/tap the applicable Sale transaction type. Sale transactions for the types Purchase and Delayed Charge will also prompt for Extra Charge reasons; you may select more than one Extra Charge reason for that transaction. Sale type and Extra Charge reason(s) will appear on the guest receipt as well as Transaction Reports.

For Sale transactions, the customer's card will be authorized for the Total Amount entered in and be *immediately* captured and placed in the current day's Open Settlement Batch until the batch closes later that day by the lodging clerk/manager.

1. To begin a **Sale** transaction (which will capture funds on the same day) tap on the **Sale** tab. Select a Sale transaction type. Tap Next.
2. For Sale Types of "Purchase" or "Delayed Charges", you will also be prompted to choose "Extra Charge Reasons". Select/tap all reasons which apply. Tap Next.

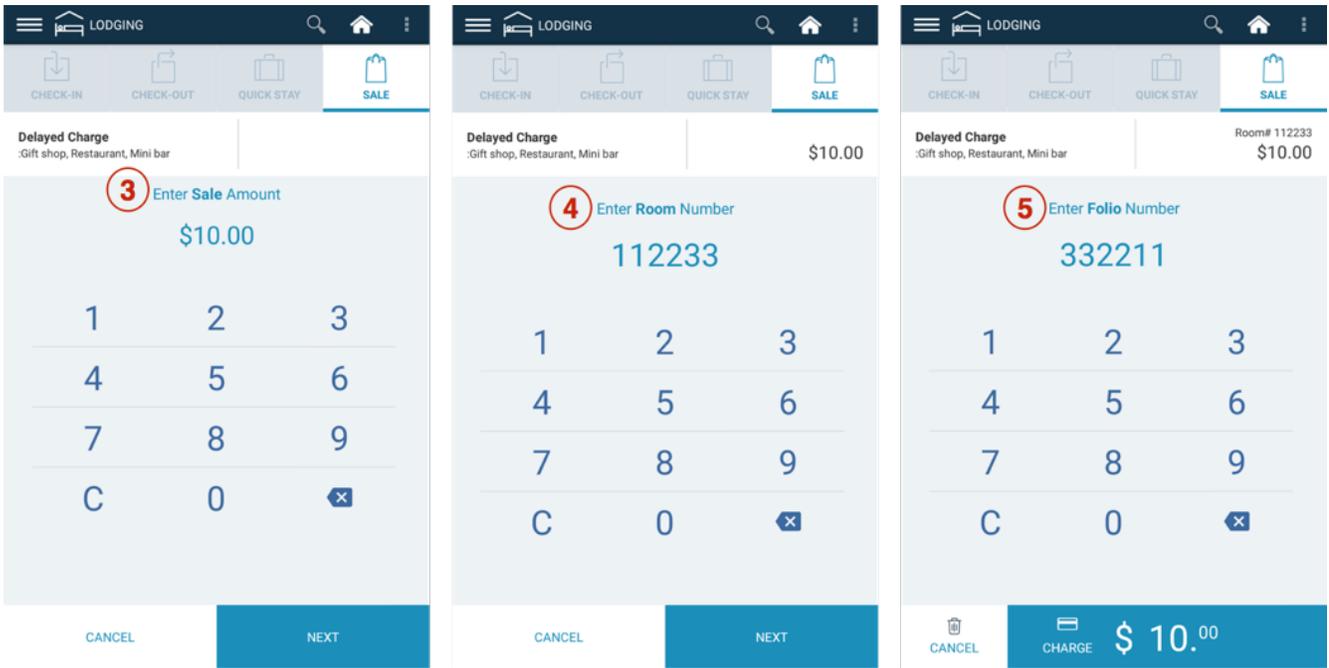
The image displays three sequential screenshots of the Lodging app interface, illustrating the steps to process a Sale transaction.

Screenshot 1: The 'SALE' tab is selected in the top navigation bar. A red circle with the number '1' is next to the instruction 'Select your charges'. Below this, there are six buttons arranged in a 3x2 grid: 'No Show', 'Purchase', 'Card Deposit', 'Delayed Charge', 'Express Service', and 'Assured Reservation'. At the bottom, there are 'CANCEL' and 'NEXT' buttons.

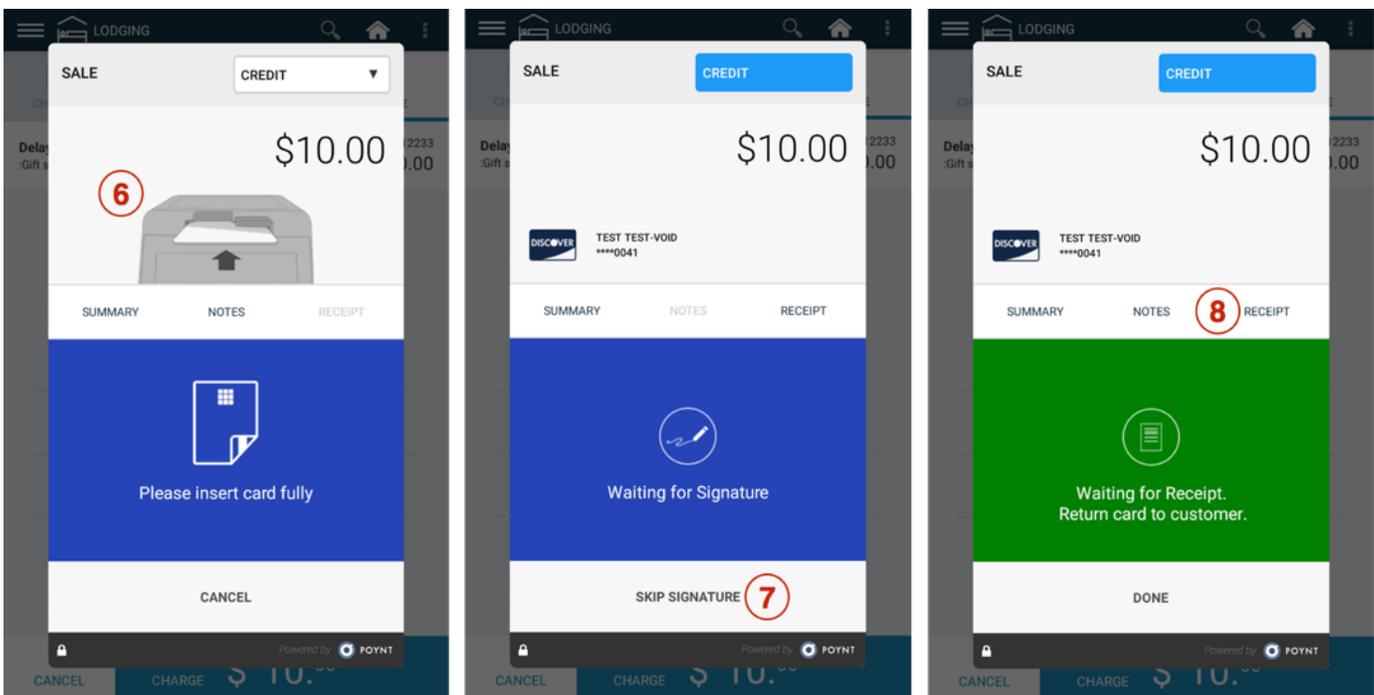
Screenshot 2: The 'SALE' tab remains selected. The instruction 'Select your charges' is centered. The 'Delayed Charge' button is highlighted in green, indicating it has been selected. The other buttons remain the same. At the bottom, there are 'CANCEL' and 'NEXT' buttons.

Screenshot 3: The 'SALE' tab remains selected. A red circle with the number '2' is next to the instruction 'Charges' and 'Extra charge reasons *Select all that apply'. Below this, there are six buttons arranged in a 3x2 grid, each with a checkbox: 'Restaurant' (checked), 'Telephone', 'Gift Shop' (checked), 'Laundry', 'Mini Bar' (checked), and 'Other'. At the bottom, there are 'CANCEL' and 'NEXT' buttons.

3. Enter the **Total Amount** for the Sale transaction. Tap Next.
4. Enter the **Room Number** for the guest to associate the Sale transaction to the guest's room stay. Tap Next.
5. Enter the **Folio Number** for the stay. Tap Next.
 - a. *Note: Folio Number is an optional Lodging setting that can be disabled in the Poynt.net HQ web portal > Store Settings > Lodging Settings tab.*



6. Insert / Swipe Card or Tap NFC for Payment. Wait for the card authorization.
7. Wait for the customer signature on the customer screen.
 - a. *Option: You can also choose to skip this step and obtain signature on the printed receipt. Tap 'Skip Signature' to proceed to Receipt screen.*
8. Wait for customer receipt selection (email, paper, none or text).
 - a. *Option: You can also print out a receipt by tapping on the 'Receipt' tab.*



Lodging – Modify Stay (Incremental Authorization)

At times, if you need to Modify a guest's stay – whether to extend the Check-Out Date or to Increase the Amount of the Authorization on the card, you can use **Modify Stay** to process these changes. You can **Modify Stay** by searching for and pulling up the details of an existing **Checked-In** transaction from the Details List.

1. Tap on the 3-bar left-hand navigation menu and tap on **Details List** option. Search by Room Number or locate the record from the Details List. Tap on the record.
2. Tap on **Modify Stay** to proceed.

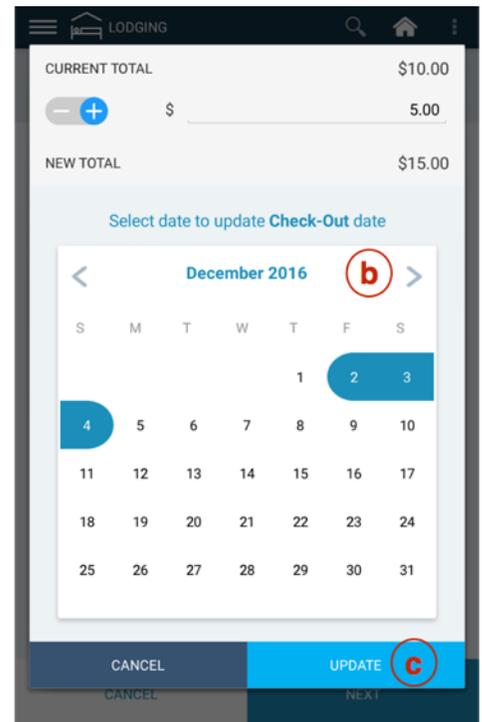
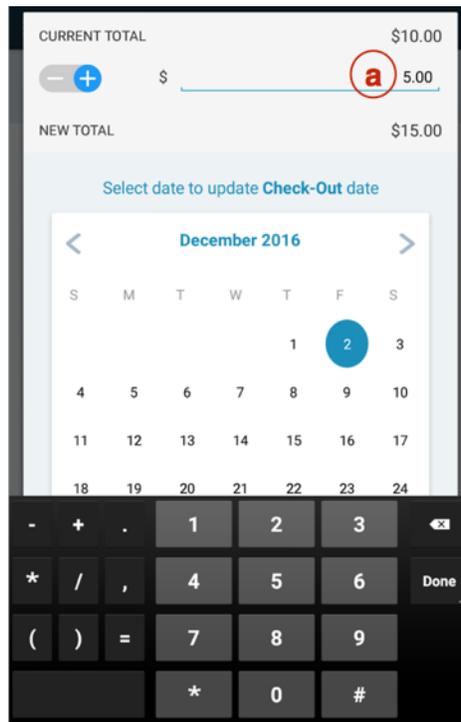
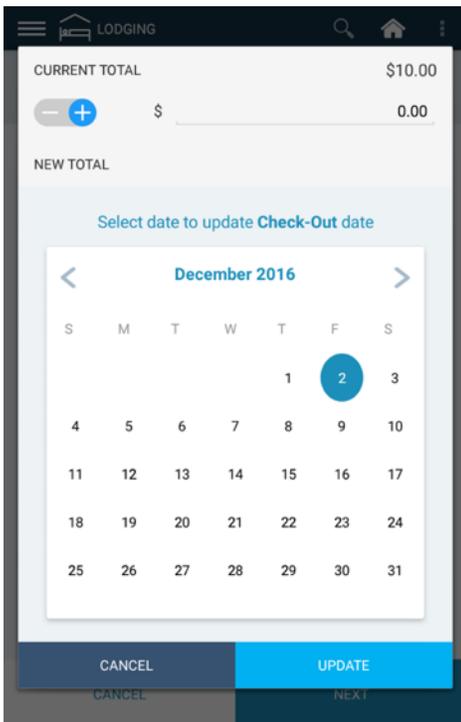
The first screenshot shows the 'LODGING' screen with a 'DETAILS LIST' sidebar. The 'Total Stay Amount' is \$0.00. A numeric keypad is visible at the bottom.

The second screenshot shows a list of transactions with the following data:

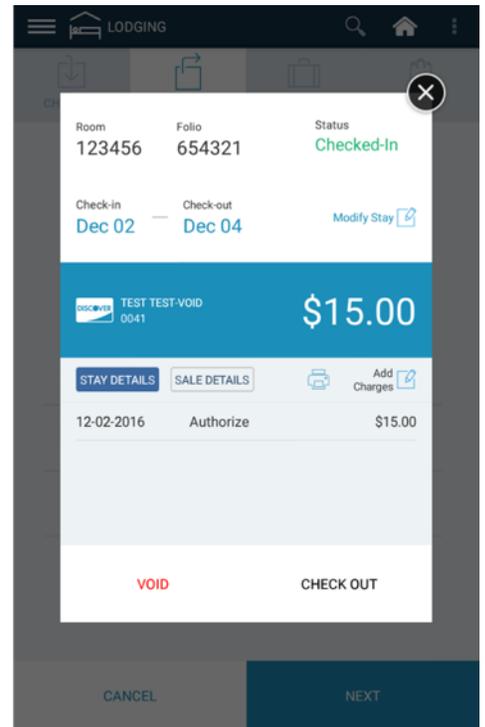
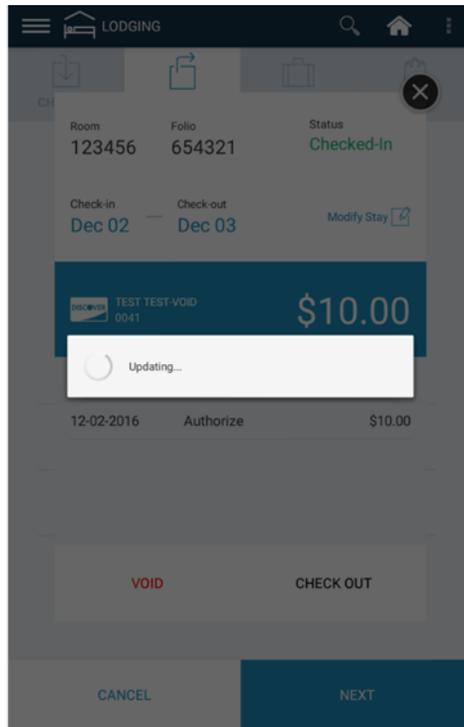
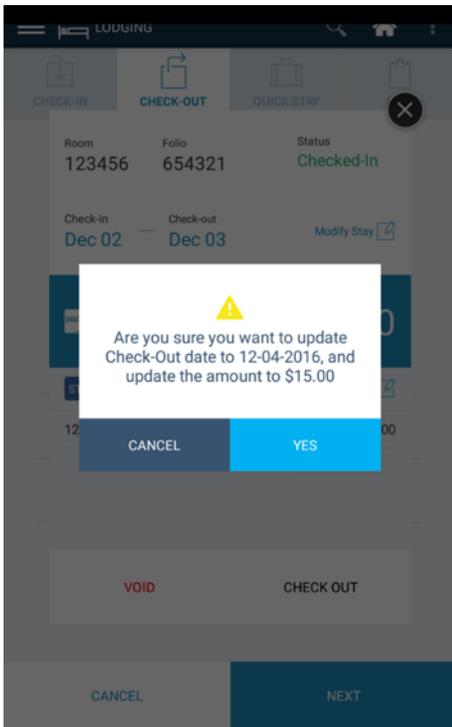
Type	Room	Check-In Date	Check-Out Date	Total	Transaction Status
CI	123456	Dec 02	Dec 03	\$10.00	Pending
S	112233	Dec 02	--	\$10.00	Completed
QS	44445555	Dec 02	Dec 03	\$11.00	Completed
CI	88	Dec 02	Dec 03	\$6.93	Pending
CO	123456	Dec 02	Dec 04	\$15.00	Completed
S	112233	Dec 02	--	\$10.00	Completed
QS	44445555	Dec 02	Dec 03	\$11.00	Completed
QS	789456	Dec 02	Dec 03	\$11.00	Completed
CO	1979	Dec 01	Dec 09	\$100.02	Completed
NR	-	Dec 01	--	\$50.00	Refunded
CO	996	Dec 01	Dec 02	\$55.00	Completed

The third screenshot shows the details of a 'Checked-In' transaction for Room 123456, Folio 654321. The 'Modify Stay' button is circled in red. The transaction amount is \$10.00. The screen also shows 'STAY DETAILS' and 'SALE DETAILS' tabs, and a 'VOID' button.

3. You can choose to **Increase the Total Stay Amount** to process an Incremental Authorization on the guest's credit card on file. OR You can choose to **Update the Check-Out Date**. OR You can choose to Modify both the Total Stay Amount and Check-Out Date. Tap on the field(s) you wish to modify.
 - a. Modify Amount:
 - i. You can increase the amount of the Total Stay which will process an Incremental Authorization on the existing card on file for the stay.
 - ii. You can decrease the amount of the Total Stay (for example if the guest is checking out earlier than originally specified). *Note: The decreased amount is saved until the clerk Checks-Out the guest stay record.*
 - b. Update Check-Out Date:
 - i. The highlighted date is the original Check-In Date. If you need to change the Check-Out Date, tap on the new date to update the stay with the new Check-Out Date.
 - c. Tap on the bottom right **Update** button to proceed with the Modified Amount and/or Check-Out Date.



4. You will see a pop-up box confirming your Updates/Modification (either Total Stay Amount, Check-Out Date, or both).
5. You will see a pop-up box showing Updating in progress.
6. You will return to the Check-In Stay Details which will show you the Updated Changes.



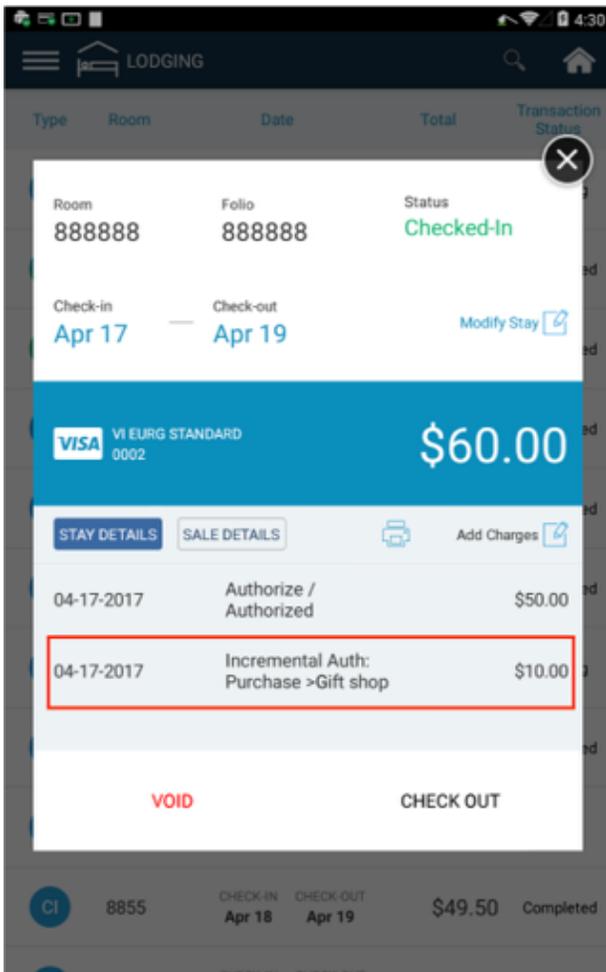
Lodging – Add Charges (Incremental Auth Transaction)

At times, you may need to process transactions which are added to the guest's credit card on file for the Stay. You can use the **Add Charges** functionality directly from the Stay Details screen.

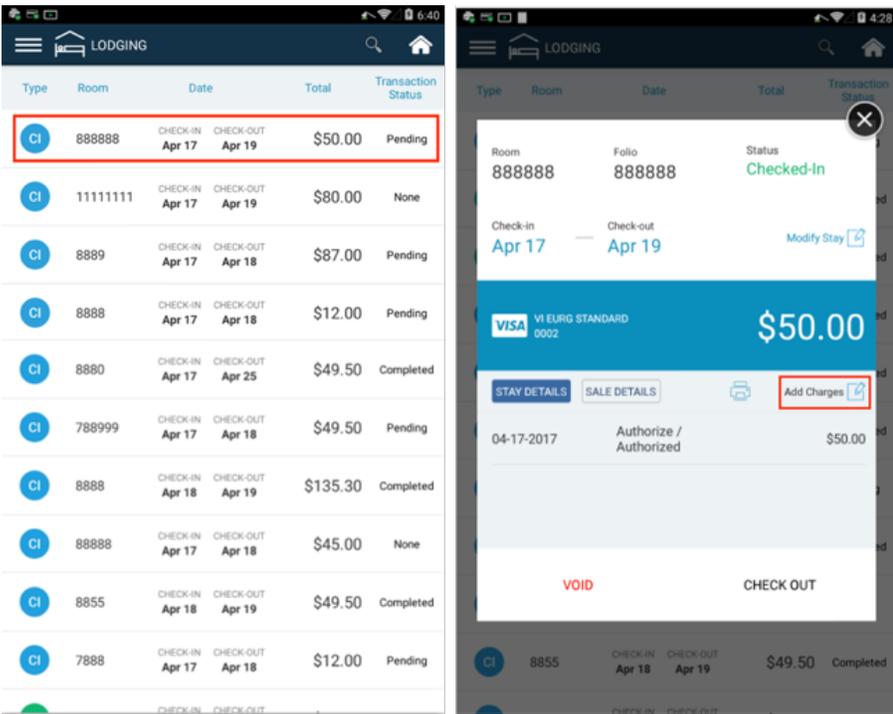
You will be prompted to select/tap the applicable Extra Charge reasons; you may select more than one Extra Charge reason for that transaction.

For **Add Charges**, these type of transactions will be processed as an Incremental Authorization to the Checked-In stay amount. The customer screen will display the signature and receipt screens for the Incremental Authorization. Receipts will display the reason(s). Incremental Auths are captured at the time of the guest Check-Out along with the checked-in authorization amount for the Total Amount of stay.

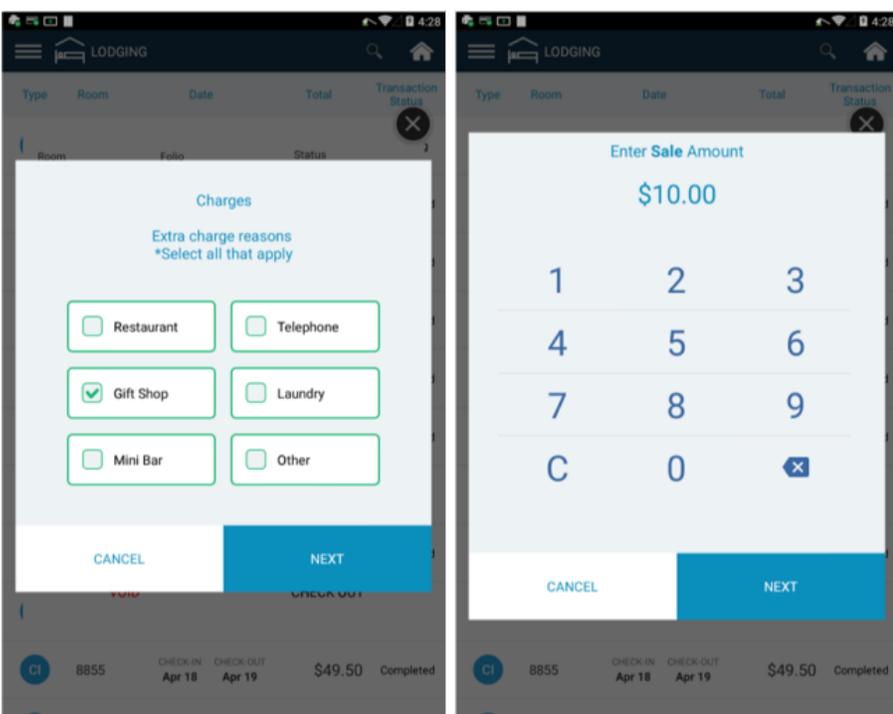
Incremental Auth transactions processed from the **Add Charges** flow will be displayed under the Stay Details tab from the Stay pop-up.



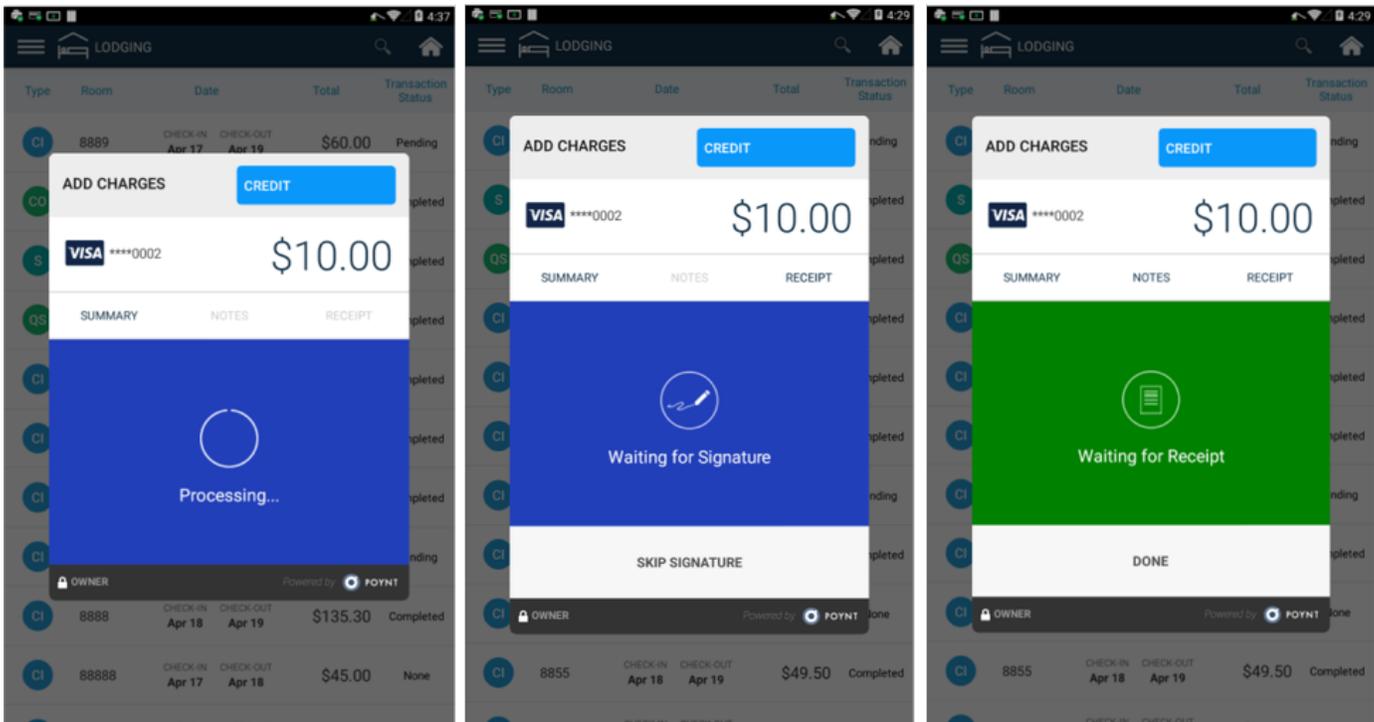
1. To begin an **Add Charges (Incremental)** transaction (which will add an Incremental Auth to the Stay), search for and pull up the details of an existing **Checked-In** transaction from the Details List.
2. Tap on **Add Charges**.



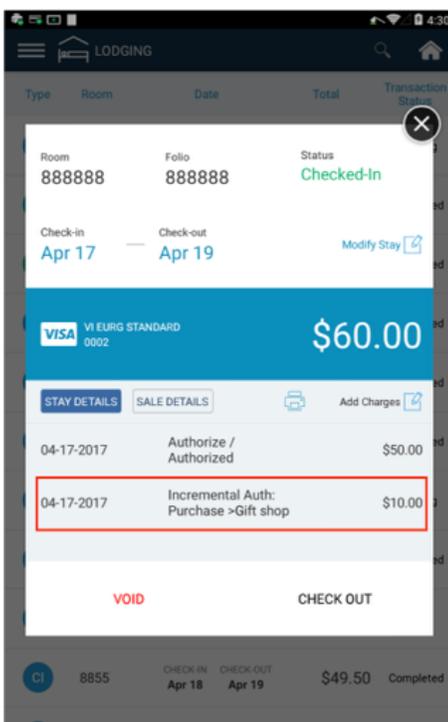
3. Select a Sale transaction type, choose the Charge “Reasons”. Select/tap all reasons which apply. Tap Next.
4. Enter the **Total Amount** for the Sale transaction. Tap Next



5. Wait for the card authorization.
6. Wait for the customer signature on the customer screen.
 - a. Option: You can also choose to skip this step and obtain signature on the printed receipt. Tap 'Skip Signature' to proceed to Receipt screen.
7. Wait for customer receipt selection (email, paper, none or text).
 - a. Option: You can also print out a receipt by tapping on the 'Receipt' tab.



8. When the **Add Charges (Incremental Auth)** transaction is completed, you will see the Add Charge Details in the pop-up details for that Stay:



Lodging – Void Stay

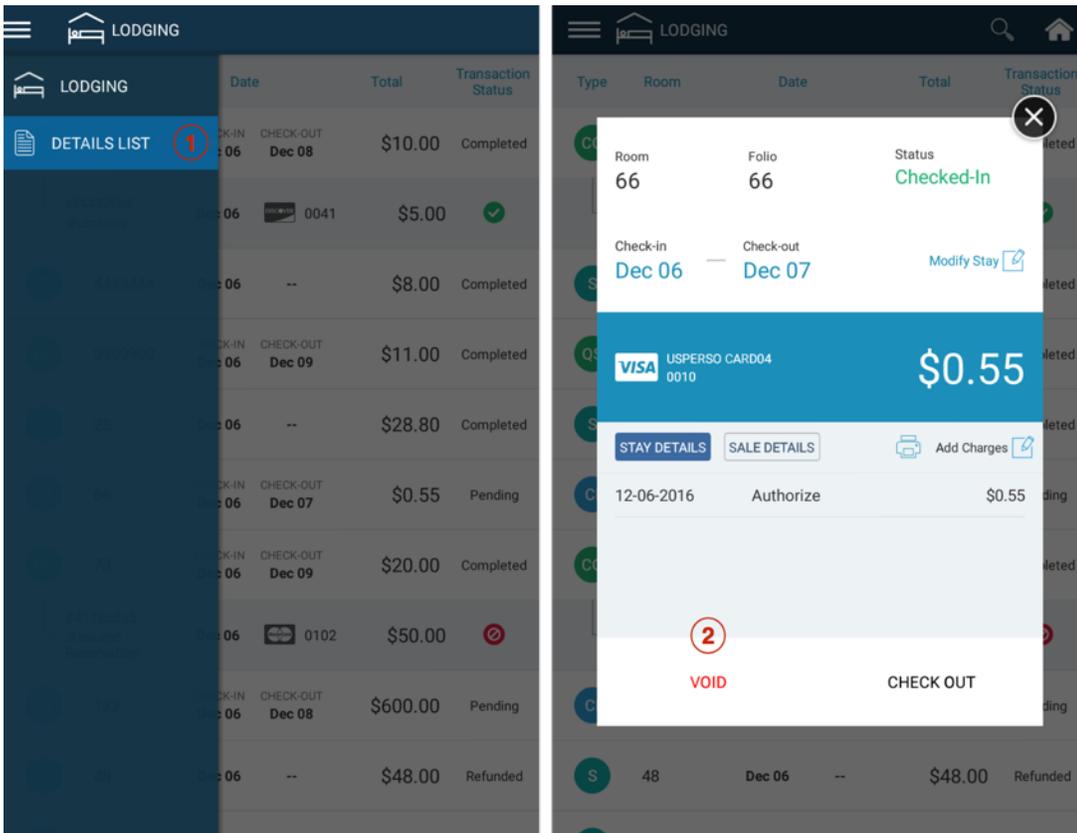
At times, if you need to **Void** or Cancel a guest's Check-In stay record prior to the transaction capturing or settling, you may do so by pulling up the Stay record from the Details list.

You may **Void** any Check-In transactions which have not yet been settled or closed out in the settlement batch. Processing the Void on the Check-In will cancel the authorization on the customer's card and release the funds held.

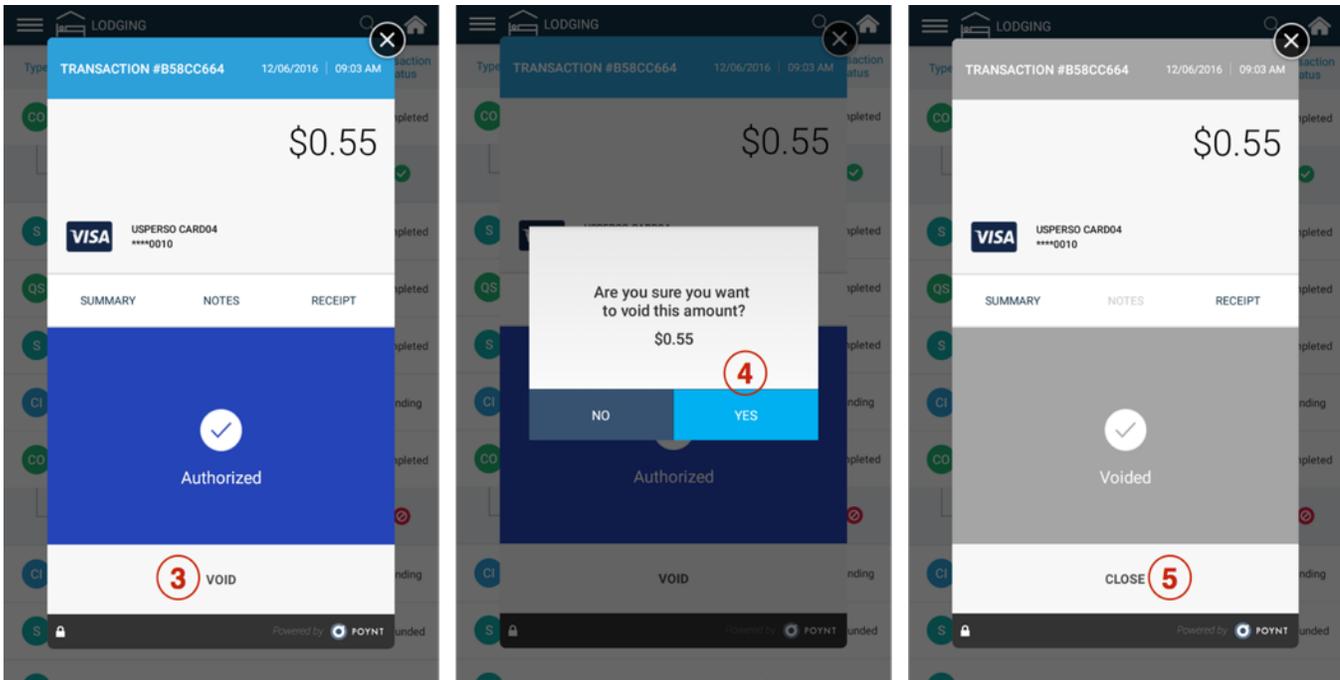
*NOTE: For **Quick Stay**, **Checked-Out**, and **Sale** transactions processed during the current day which have not yet settled or batch closed, you may Void those transactions which are sitting in the current day's Open Settlement Batch from the Settlements App as long as the batch remains open. Refer to the section on Settlements.*

To **Void** a Check-In transaction that is authorized (in Pending status):

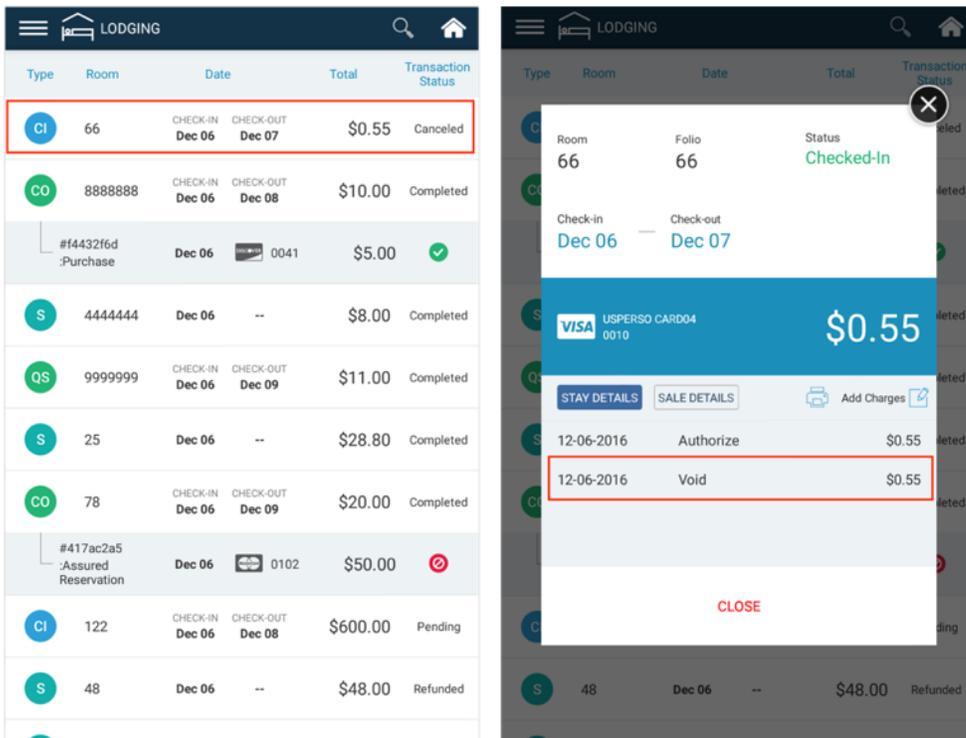
1. Tap on the 3-bar left-hand navigation menu and tap on **Details List** option. Search by Room Number or locate the record from the Details List. Tap on the record.
2. Tap on **Void** to proceed.



- You will see the details of the original authorization transaction for the Check-In. Tap on **Void** to proceed.
- A pop-up screen will confirm whether you would like to proceed with the Void. Tap Yes to continue.
- The transaction details screen will display a confirmation that the transaction has been voided.



- When the **Void** on the Check-In transaction is completed, you will see the Stay record as “Canceled” in Details List, and the pop-up details for that Stay will show status of “Void”:



Lodging – Refund transaction

At times, if you need to **Refund** an already captured and settled transaction (ie Checked-Out, Quick Stay, or Sales transactions), you may do so by pulling up the Stay or Sale transaction record from the Details List. You may **Refund** any settled transactions (which are indicated by the “Completed” or green checkmark status icon). Processing the Refund will place the refund transaction in the current day’s open Settlement Batch, and the refund will be completed once the batch is submitted and closed later that day by the lodging clerk/manager

1. Tap on the 3-bar left-hand navigation menu and tap on **Details List** option. Search by Room Number or locate the Stay or Sale record from the Details List. Tap on the record.
2. Tap on **Refund** to proceed.
3. You will be prompted to provide a Refund transaction type (ie whether the refund transaction is for a Card Deposit, as an example). Tap Next.

Type	Room	Date	Total	Transaction Status
CO	4545	CHECK-IN Dec 19 CHECK-OUT Dec 24	\$10.00	Completed
CI	8989	CHECK-IN Dec 12 CHECK-OUT Dec 14	\$10.00	Pending
NR	-	Dec 07 --	\$10.00	Refunded
QS	3344	CHECK-IN Dec 07 CHECK-OUT Dec 09	\$10.00	Refunded
CI	3434	CHECK-IN Dec 26 CHECK-OUT Dec 31	\$20.00	Pending
S	2424	Dec 07 --	\$10.00	Completed
S	2323	Dec 07 --	\$10.00	Completed
CO	2233	CHECK-IN Dec 11 CHECK-OUT Dec 14	\$10.00	Completed
#9e150393 Delayed Charge	Dec 07	2205	\$5.00	
S	5010	Dec 06 --	\$50.10	Completed

Room	Folio	Status
4545	4545	Checked-Out

Check-in	Check-out
Dec 19	Dec 24

Amount
\$10.00

STAY DETAILS	SALE DETAILS	Add Charges
12-07-2016	Authorize	\$10.00
12-07-2016	Capture	\$10.00

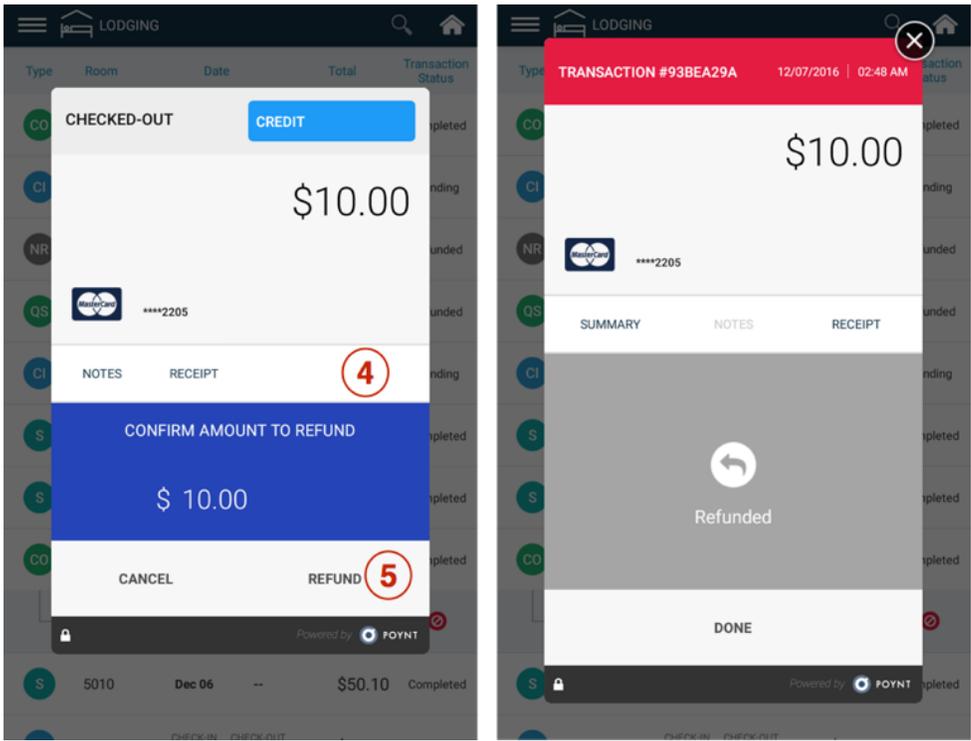
REFUND	CLOSE
--------	-------

3 Select your refund

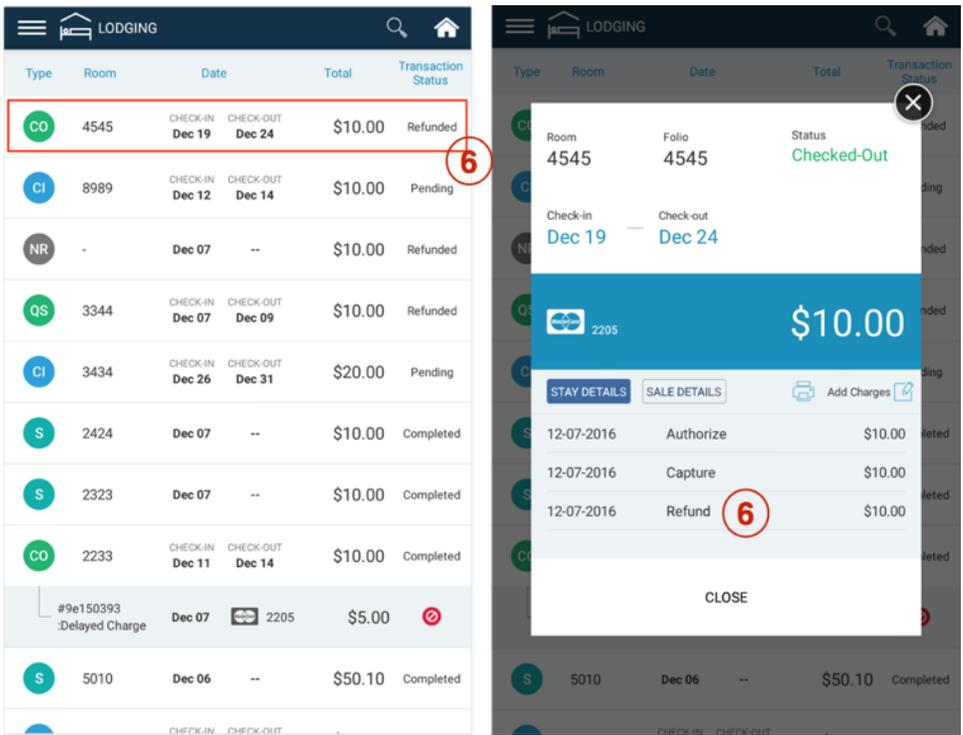
No Show	Purchase
Card Deposit	Delayed Charge
Express Service	Assured Reservation

CANCEL NEXT

- You will be prompted to confirm the amount you wish to Refund. Tap on the amount field if you need to change the amount for a Partial Refund.
- Tap **Refund** to complete.



- When the **Refund** transaction is completed, you will see the Stay or Sale transaction record as "Refunded" in Details List, and the pop-up details for that Stay or Sale record will also show "Refunded":



Lodging – Non-Reference Refund transaction

At times, if you need to **Refund** a customer’s credit card directly without referring to a previous Stay or Sale transaction record, you may process a **Non-Reference Refund**. NOTE: Only Terminal User logins who are “Owners” can view this option in the Lodging app; “Employees” will not see this menu option.

Processing the Refund will place the refund transaction in the current day’s open Settlement Batch, and the refund will be completed once the batch is submitted and closed later that day by the lodging clerk/manager.

1. Tap on the 3-dot upper right-hand navigation menu and tap on **Non-Reference Refund** option.
2. You will be prompted to provide a Refund transaction type (ie whether the refund transaction is for a Card Deposit, as an example). Tap Next.
3. Enter Refund Amount. Tap **Refund**.

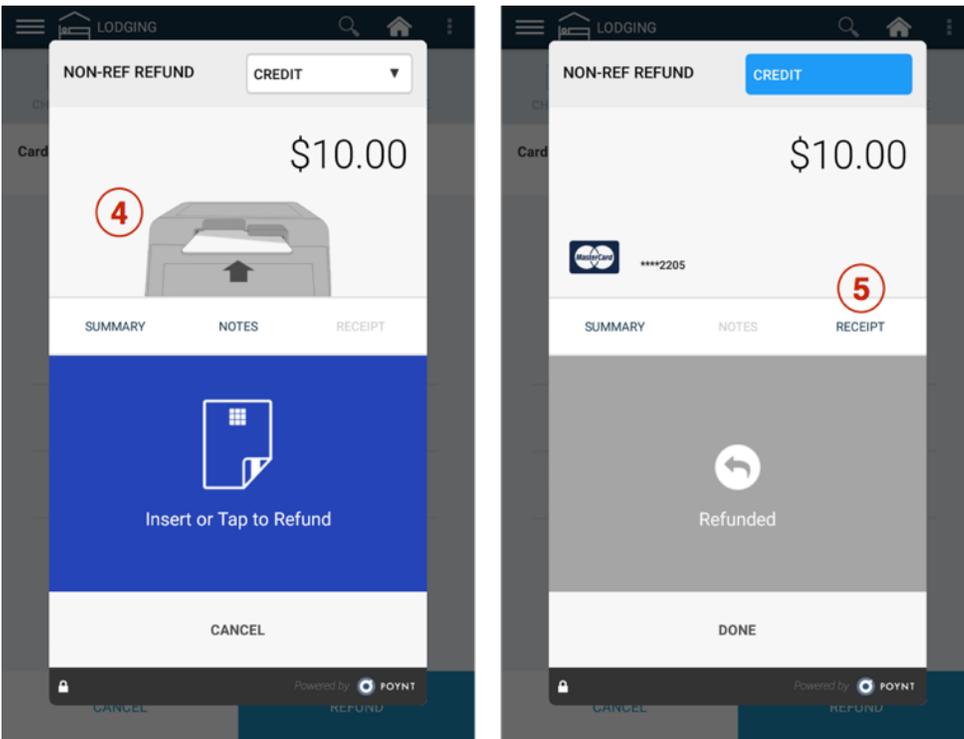
The image displays three sequential screenshots of the Lodging app interface, illustrating the steps to process a Non-Reference Refund.

Screenshot 1: The app shows the 'LODGING' screen with a navigation bar at the top. The 'QUICK STAY' option is highlighted with a red circle and the number '1'. Below the navigation bar, there are four icons: CHECK-IN, CHECK-OUT, QUICK STAY, and SALE. The main screen displays 'Enter Total Stay Amount' with a value of '\$0.00'. Below this is a numeric keypad with digits 1-9, a 'C' key, and a '0' key. At the bottom, there are 'CANCEL' and 'NEXT' buttons.

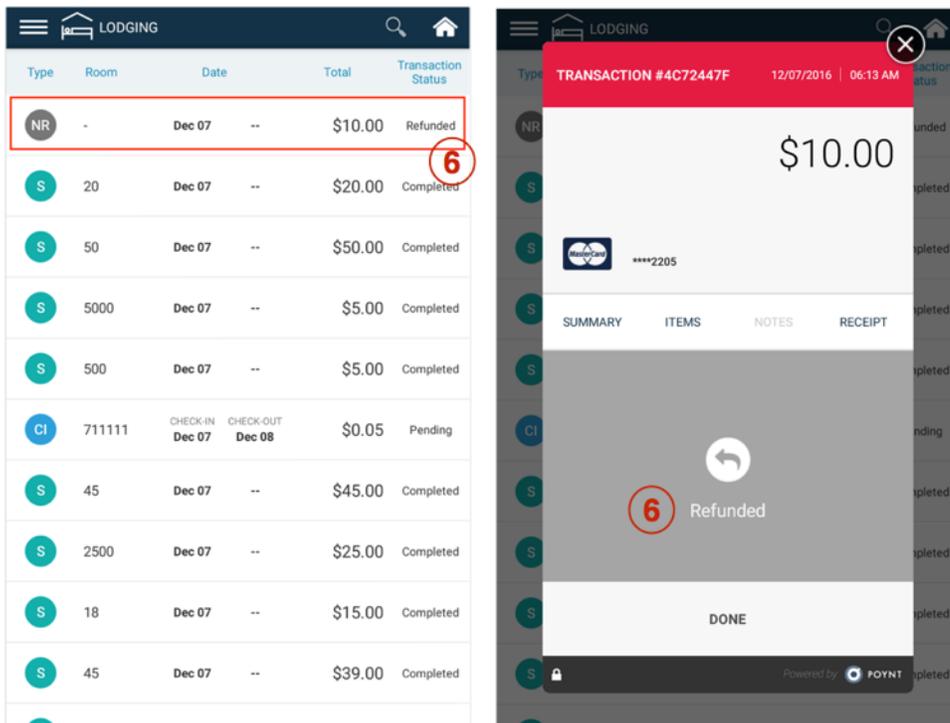
Screenshot 2: The app shows the 'LODGING' screen with a navigation bar at the top. The 'QUICK STAY' option is highlighted with a red circle and the number '2'. Below the navigation bar, there are four icons: CHECK-IN, CHECK-OUT, QUICK STAY, and SALE. The main screen displays 'Select your refund' with a red circle and the number '2'. Below this are six buttons: 'No Show', 'Purchase', 'Card Deposit' (highlighted in green), 'Delayed Charge', 'Express Service', and 'Assured Reservation'. At the bottom, there are 'CANCEL' and 'NEXT' buttons.

Screenshot 3: The app shows the 'LODGING' screen with a navigation bar at the top. The 'QUICK STAY' option is highlighted with a red circle and the number '3'. Below the navigation bar, there are four icons: CHECK-IN, CHECK-OUT, QUICK STAY, and SALE. The main screen displays 'Card Deposit' and 'Enter Total Amount to Refund' with a value of '\$10.00'. Below this is a numeric keypad with digits 1-9, a 'C' key, and a '0' key. At the bottom, there are 'CANCEL' and 'REFUND' buttons.

4. Insert / Swipe Card to Refund. Wait for the refund confirmation.
5. You will see Refund confirmation and also can choose receipt selection (email, paper, none or text). *Option: You can also print out a receipt by tapping on the 'Receipt' tab.*



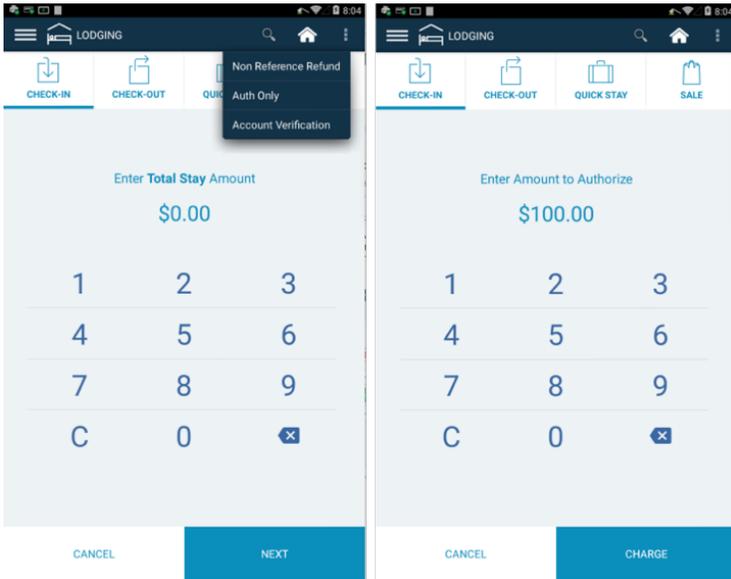
6. When the **Non-Reference Refund** transaction is completed, you will see the transaction record as “Refunded” in Details List, and the pop-up details for that transaction record will also show “Refunded”:



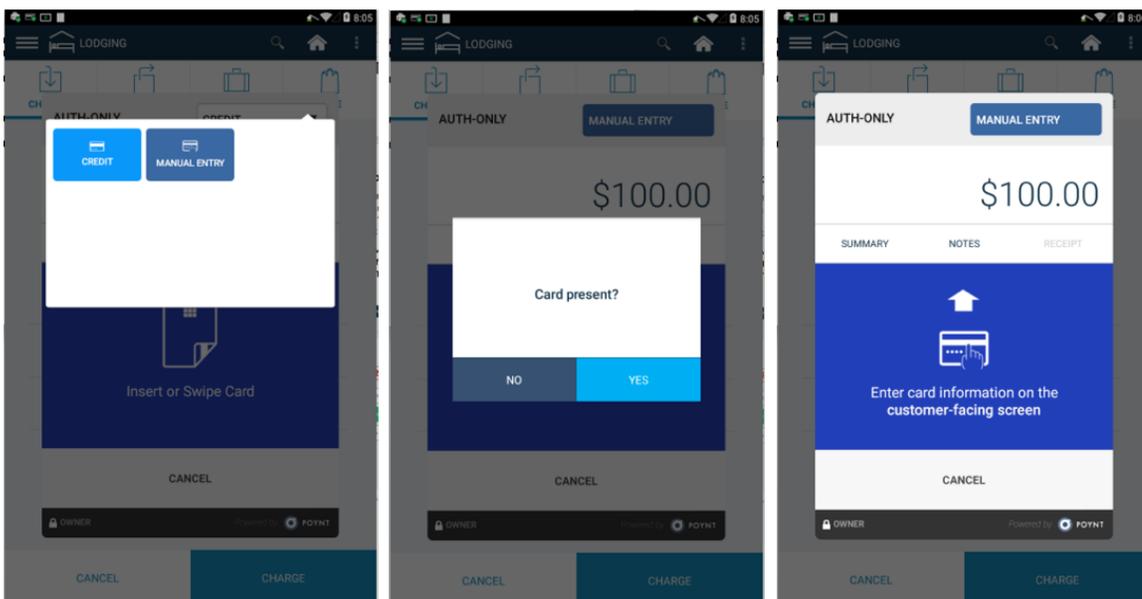
Lodging – Auth-Only transaction

At times, if you need to process an Authorization-only (meaning the hold on funds is not captured) in advance of a guest's stay, you can run a Manually-Entered Auth-Only transaction in order to review or confirm AVS and CVV Response codes. This is used in situations where the merchant needs to verify that the customer has a valid payment method by reviewing the AVS/CVV Response Codes.

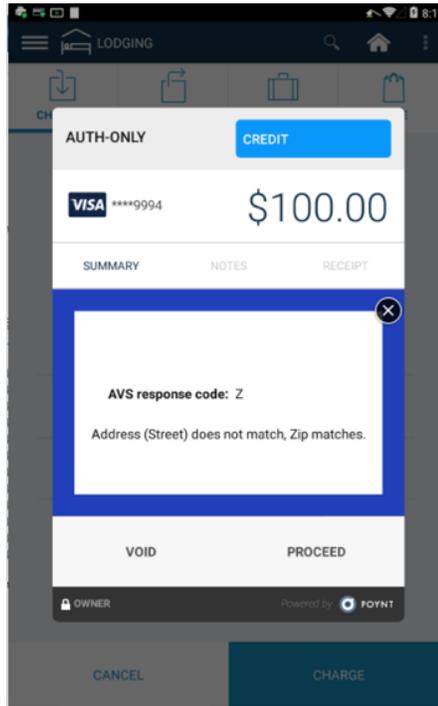
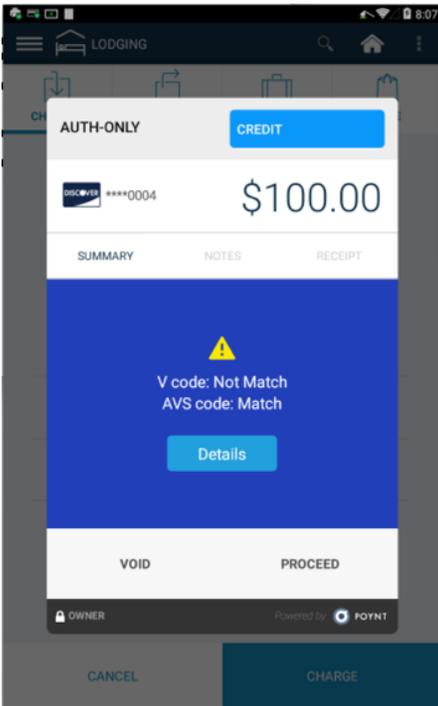
1. Tap on the 3-dot upper right-hand navigation menu and tap on **Auth-Only** option.
2. Enter Auth-Only Amount. Tap **Charge**.



3. If you need to manually enter card information to verify the auth-only, choose the right-hand drop-down. Choose **Manual Entry**.
4. You will be prompted to choose if Card is Present or not. If cardholder is not present, tap **No**.
5. Follow instructions to manually enter the following data on the smaller customer screen: card number & expiration, CVV, Zip code, & Address Street Number



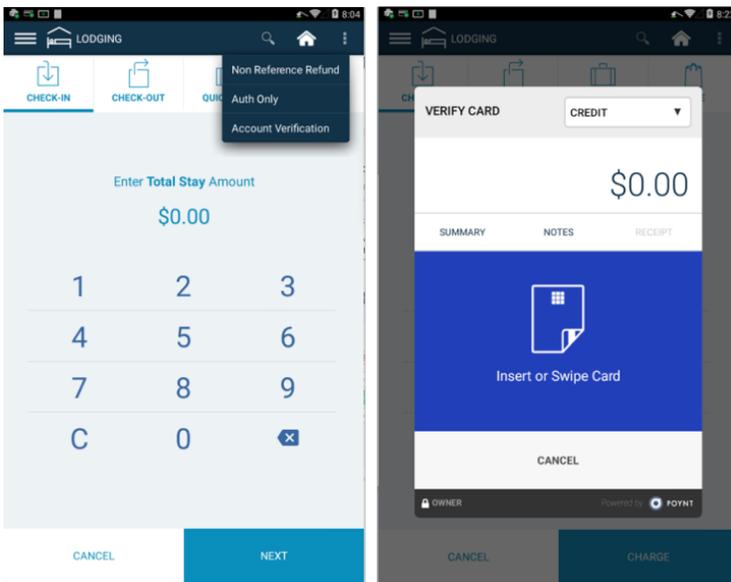
- If the transaction successfully authorizes, continue with the subsequent screens. If the transaction returns results where the AVS or CVV do not have an exact match, you will be presented with the choice to either **Proceed** or **Void** the authorization.
- You may then choose receipt options showing the AVS/CVV results for the auth-only.



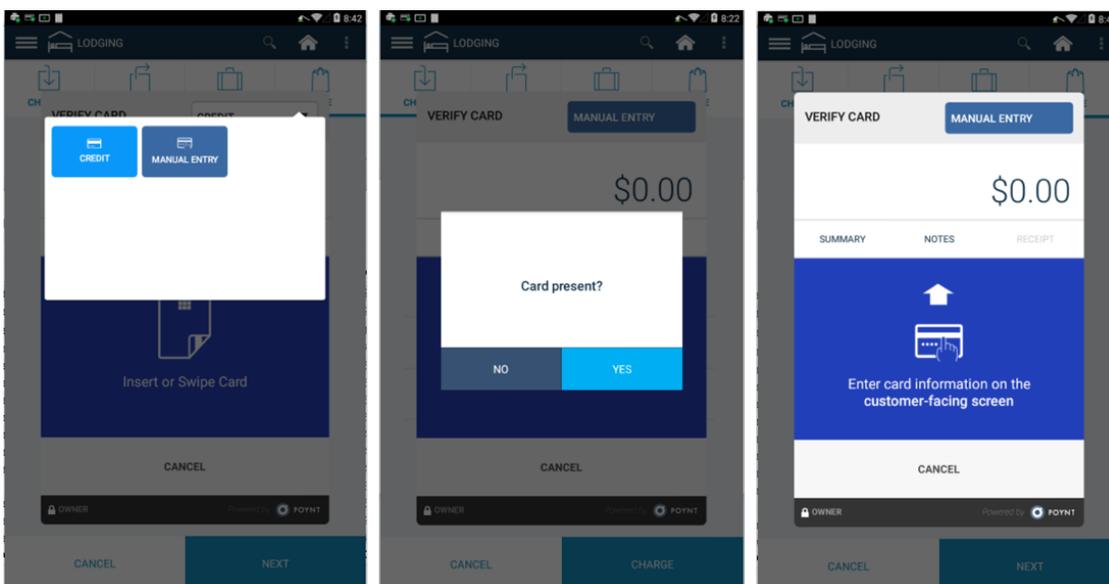
Lodging – Account Verification (\$0 Auth) transaction

At times, if you need to process an Authorization Only for \$0 in order to verify guest has a valid card in advance of the guest's stay, you can run a Manually-Entered Account Verification transaction in order to review or confirm AVS and CVV Response codes. This is used in situations where the merchant needs to verify that the customer has a valid payment method by reviewing the AVS/CVV Response Codes.

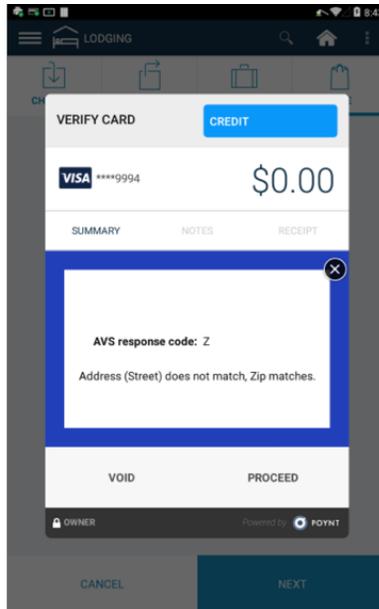
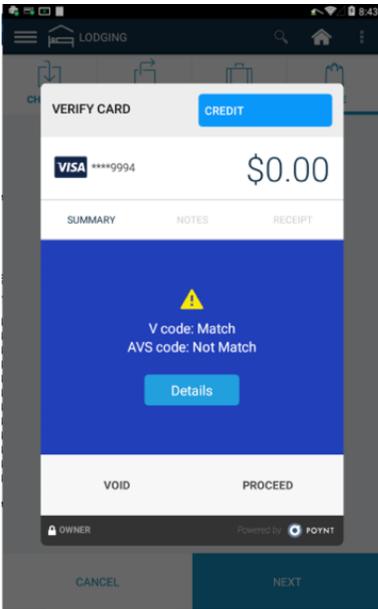
1. Tap on the 3-dot upper right-hand navigation menu and tap on **Account Verification** option.
2. There is no amount required for Card Verification so the default is \$0.



3. If you need to manually enter card information, choose the right-hand drop-down. Choose **Manual Entry**.
4. You will be prompted to choose if Card is Present or not. If cardholder is not present, tap **No**.
5. Follow instructions to manually enter the following data on the smaller customer screen: card number & expiration, CVV, Zip code, & Address Street Number

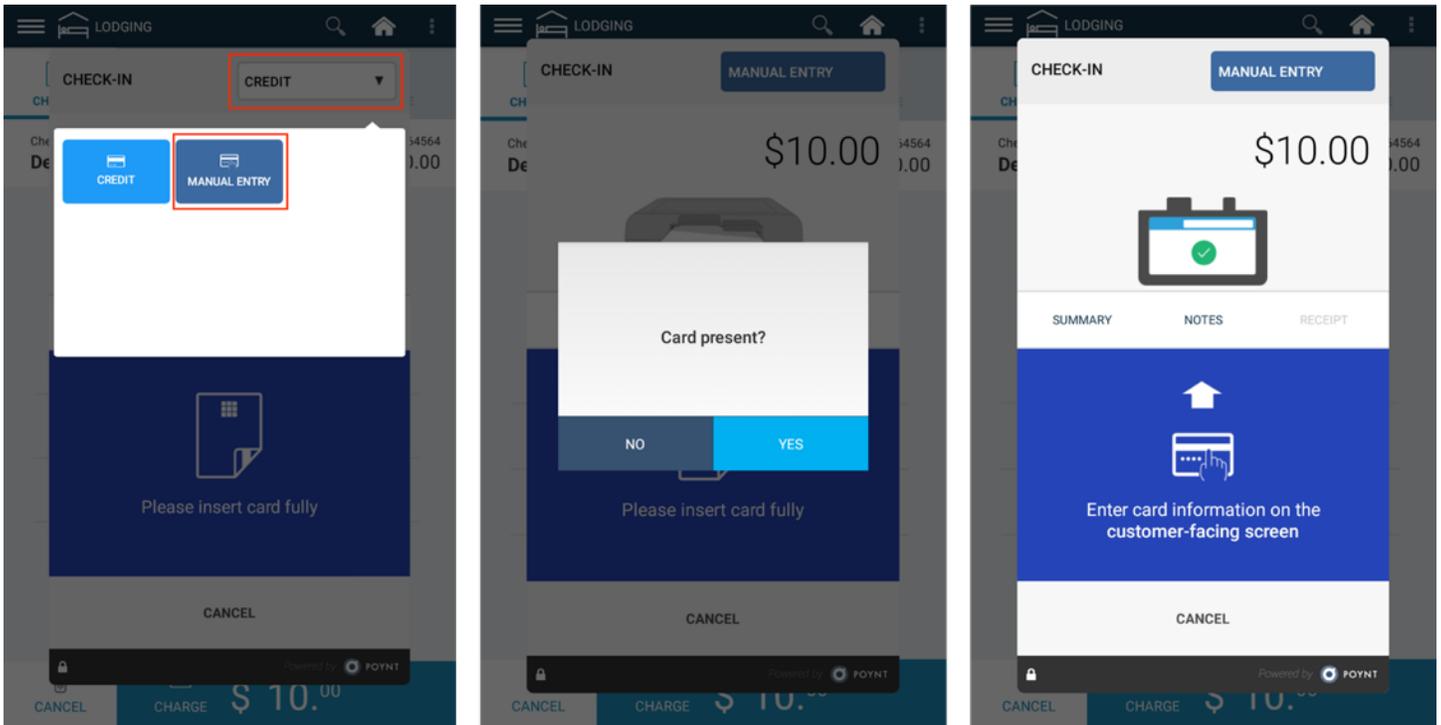


- If the card information successfully verifies, continue to the receipt option screen. If the transaction returns results where the AVS or CVV do not have an exact match, you will be presented with the choice to either **Proceed** or **Void** the authorization.
- You may then choose receipt options showing the AVS/CVV results for the card verification.



Lodging – Manual Entry transaction

At times, if you need to process a **Manual Entry** transaction to charge a customer’s credit card (whether the card is present but not able to be swiped or the card is not present for a phone order), you may key in the card information once you have entered the necessary information (room number, amounts, etc) for the Check-In, Check-Out, Quick Stay or Sale transaction type. When you are at the pop-up screen that prompts for “Tap/Insert Card”, you may choose the Manual Entry method.



NOTE: **Manual Entry** transactions will prompt the clerk to enter/tap in the credit card information on the smaller secure customer screen and then continue processing on the merchant screen once card information is entered.

Processing a **Manual Entry** transaction will prompt the clerk to review any displayed AVS Response Code information (if returned by the card issuer) and then determine whether to Proceed or Void the transaction.

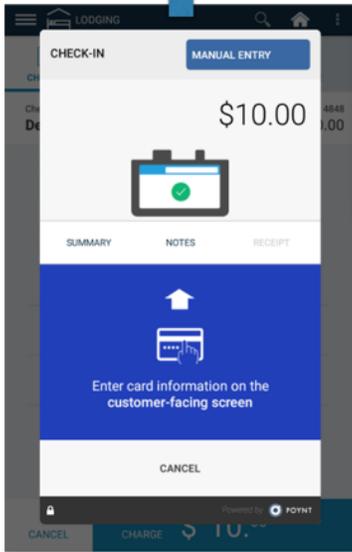
1. On the “Please insert card fully” screen, tap on the upper right-hand drop-down menu and tap on **Manual Entry** option.
2. You will be prompted to indicate whether the customer’s credit card is present or not.
 - a. Card Present transaction will prompt merchant to enter the following:
 - Credit card number
 - Credit card expiration month and year
 - CVV
 - Zip Code
 - b. Card Not Present transaction will prompt merchant to enter all of the same as Card Present and also:
 - Street Number

3. Enter in required cardholder credit card number and expiration month and year. *Please note that part of the card number will be masked for security reasons.*

Enter CC info on secure customer screen

ENTER CARD NUMBER		
1	2	3
4	5	6
7	8	9
CANCEL	0	ENTER

4111 11●●●●●●●●		
1	2	3
4	5	6
7	8	9
CANCEL	0	ENTER

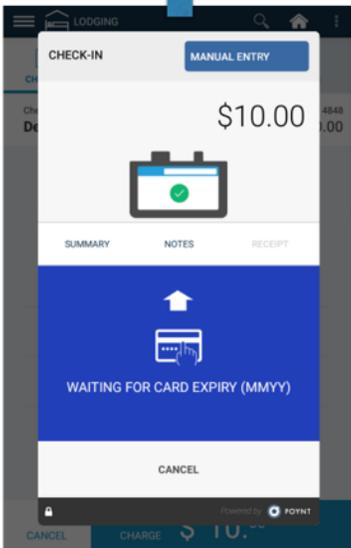


Merchant screen instructions: CC info

Enter Expir info on secure customer screen

ENTER CARD EXPIRY (MMYY)		
1	2	3
4	5	6
7	8	9
CANCEL	0	ENTER

11/20		
1	2	3
4	5	6
7	8	9
CANCEL	0	ENTER

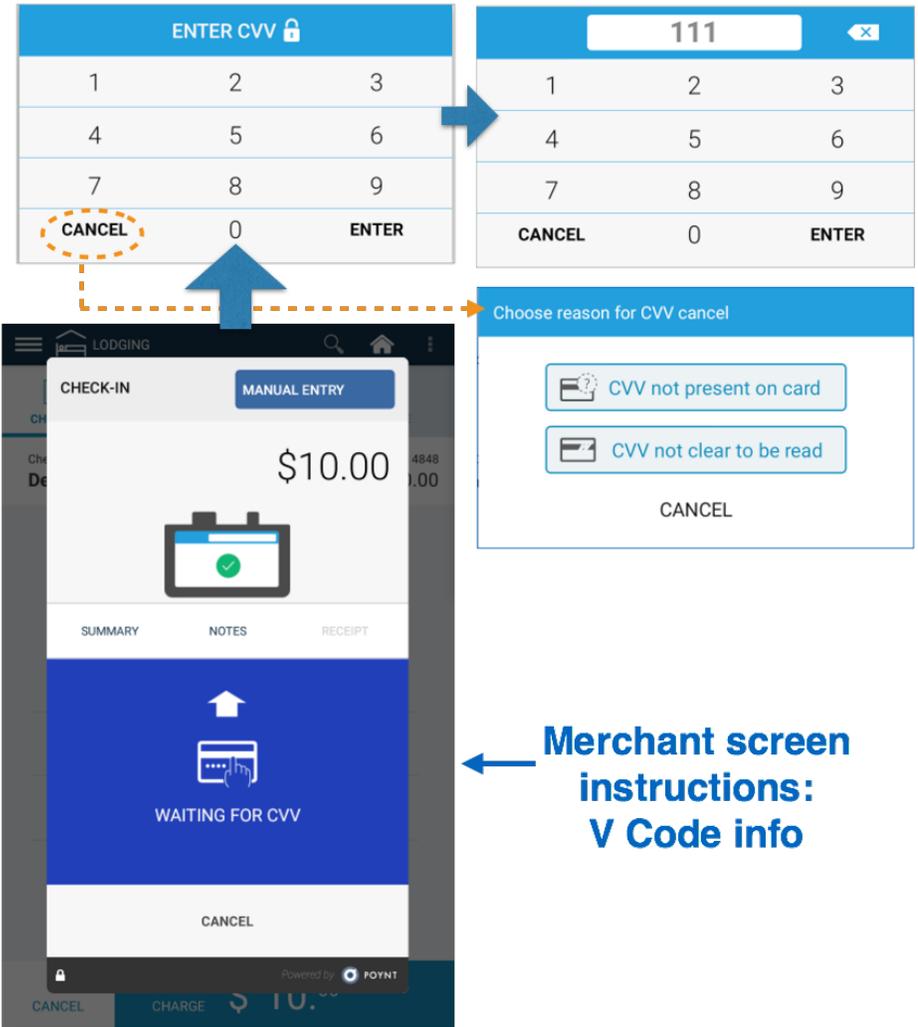


Merchant screen instructions: Expir info

4. Enter in required V Code (or Security Code) information – also known as CVV/CVV2/CVC/CVC2/CSC and is the secure code typically on the back of a credit card.

Please note that if the V Code is not present on the card or if the V Code is illegible, the merchant can tap on the Cancel button on the CVV entry screen and proceed to the next step.

Enter V Code info on secure customer screen

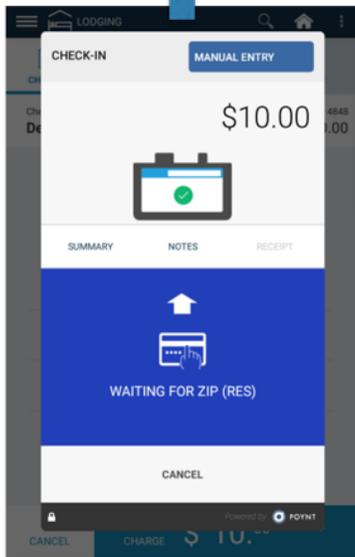


- For Card Present transactions, enter in Zip Code information. For Card Not Present transactions, enter in Zip Code information and then enter in Street Number information.

Enter Zip Code on secure customer screen

ENTER ZIP (RES)		
1	2	3
4	5	6
7	8	9
CANCEL	0	ENTER

12345		
1	2	3
4	5	6
7	8	9
CANCEL	0	ENTER

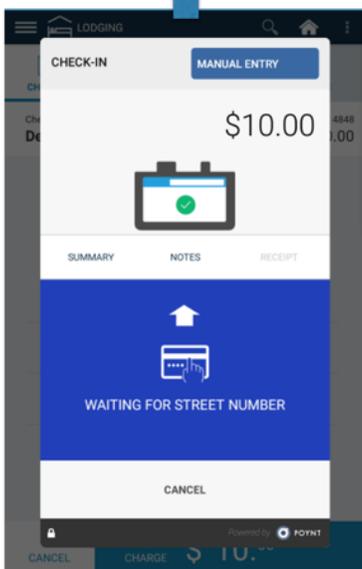


Merchant screen instructions:
Zip Code

Enter Street # info on secure customer screen

ENTER STREET NUMBER		
1	2	3
4	5	6
7	8	9
CANCEL	0	ENTER

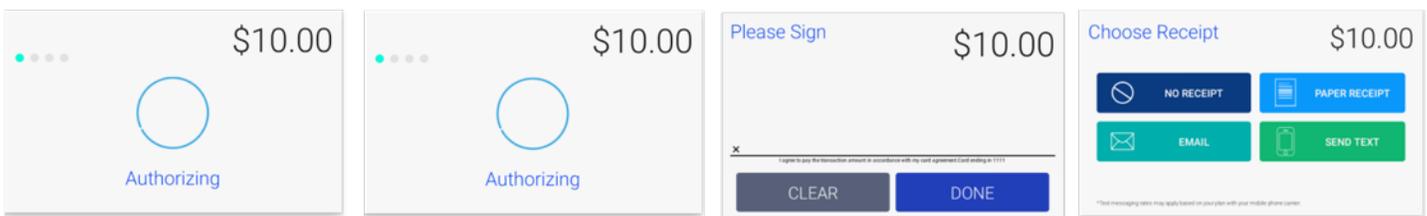
12345		
1	2	3
4	5	6
7	8	9
CANCEL	0	ENTER



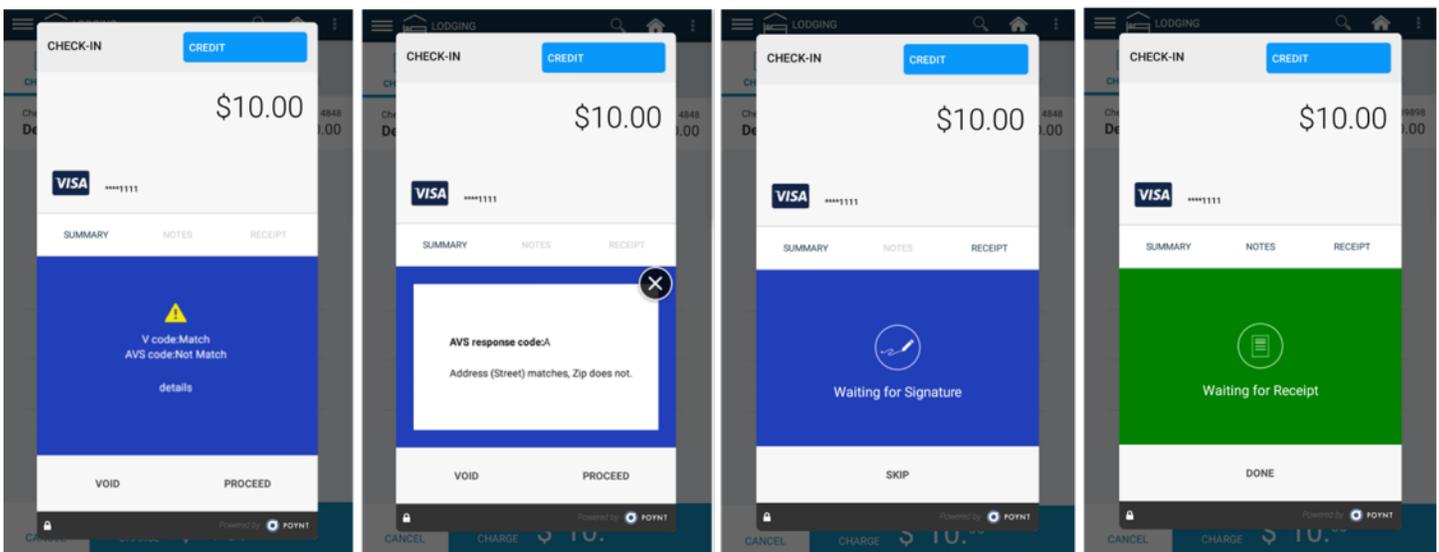
Merchant screen instructions:
Street # info

6. Manual Entry transactions are processed for V Code and AVS Code matching. A manually entered transaction may be approved by the cardholder's issuing bank even if the address verification information or card verification does not match. AVS Code and V Code processing provides the merchant additional information to help make informed decisions prior to shipping products to their customer. The merchant can determine to Void or Proceed with the manually entered transaction based on the V Code and AVS Code responses.
 - a. If both the V Code and AVS Code Match and the transaction is authorized, then the transaction proceeds directly to Receipt option screen.
 - b. If either the V Code or the AVS Code does not match and the transaction is authorized, then the merchant screen will display information on whether the V Code or AVS did not match. Tap on 'Details' to view the additional AVS Response Code information.
 - i. The merchant can choose to 'Void' the transaction or 'Proceed' with the transaction and go to the Receipt option screen.

Customer screen



Merchant screen



Note: For Manual Entry transactions, the printed receipt will show the V Code and AVS Code information.

Lodging – Details List

Below is a legend for how to Stay records are displayed with Transaction statuses. The **Type** column on the left side represents the records related to a **Stay** or a “stand-alone” **Transaction** (such as a Sale or Non-Reference Refund) and shows the Stay Type. A **Stay** might have multiple transactions associated with the Stay record (ie original check-in followed by incremental authorizations); therefore, the far right column displays a Transaction Status Summary.

Types:

- Check-In
- Check-Out
- Quick Stay
- Sale
- Non-Reference Refund

Transaction Status Summary:

- Pending: Shows a Stay record that has not yet checked-out or been captured/settled
- Completed: Shows a Stay or a Sale that has captured/settled
- Canceled: Shows a Stay or Sale where all transactions have been voided
- Refunded: Shows a Stay or Sale where all transactions have been refunded
- Partially Refunded: Shows a Stay or Sale where some portion of the transaction(s) have been refunded

Stay	Type	Type	Room	Date	Total	Transaction Status	Transaction status	Icons
	CI	Check In						
	CO	Check Out						
	QS	Quick Stay						
	S	Sale						
	NR	Non-Ref Refund						
	QS		56565	CHECK-IN Dec 07	CHECK-OUT Dec 10	\$10.00	Refunded	
	NR		-	Dec 07	--	\$10.00	Refunded	
	S		35353	Dec 07	--	\$15.00	Completed	
	CI		89898	CHECK-IN Dec 21	CHECK-OUT Dec 23	\$10.00	Pending	
			#46fb7d8	Dec 07	2205	\$2.00	Completed	✓
	QS		363636	CHECK-IN Dec 07	CHECK-OUT Dec 12	\$10.00	Completed	
			#ed95545	Dec 07	2205	\$5.00	Completed	✓
	CI		4848	CHECK-IN Dec 26	CHECK-OUT Dec 28	\$10.00	Pending	
	CO		69	CHECK-IN Dec 02	CHECK-OUT Dec 03	\$100.00	Completed	
	CI		3010	CHECK-IN Dec 08	CHECK-OUT Dec 10	\$30.10	Pending	
	CO		8989	CHECK-IN	CHECK-OUT	\$10.00	Completed	

Lodging – Stay Details

Below is a legend for how to Stay Details pop-up screens are displayed with additional information, such as:

- Stay Info (room/folio, dates, statuses)
- Card Info
- Transaction History

Button Actions will allow you to:

- Modify Stay (for Checked-In stays) to process Incremental Authorizations or Update Check-Out date
- Add Charges (Sale) to process a Sale transaction and associate it with the Stay record
- Take Transaction Actions, such as Void, Refund, or Check-Out, when applicable

Stay Details pop-up screen will also allow you to toggle between a Stay Details tab and a Sale Details tab in the bottom half of the screen. The Stay Details tab will show you details for the stay transaction history, such as date/amount of Authorization, Capture, Void, or Refund. The Sale Details tab will show you any associated Sale transactions when a clerk chose to “Add Charges” and process separate payments for various transaction types, such as Delayed Charges, No Shows, etc. Sale Details will show you records for each type of sale transaction and include Extra Charge reasons when applicable.

Stay Details Screen

Stay Info

- Room # / Folio #
- Check-In/Out dates
- Stay Status:
 - Checked In
 - Checked Out
 - Quick Stay

Stay Transaction Info

- Card Info
 - Brand / Last 4 CC #
 - Cardholder Name (if available)
- Stay Total

Stay Details Tab

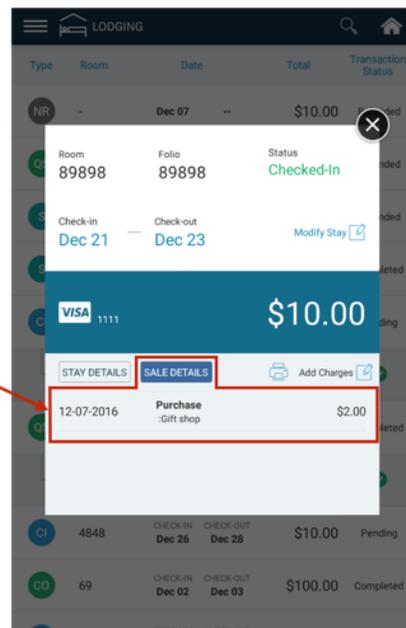
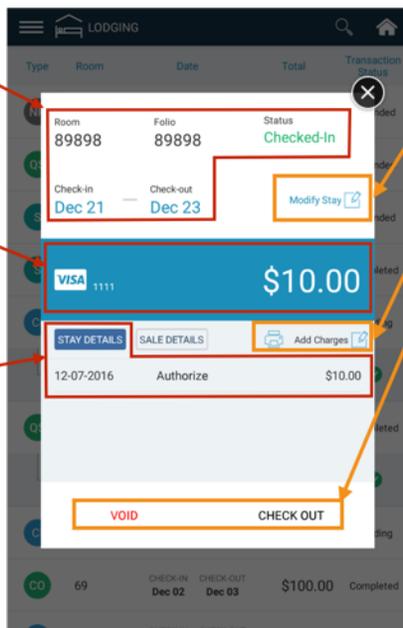
- Stay Txn History
 - Authorize Date / Amount
 - Capture Date / Amount
 - Void Date / Amount
 - Refund Date / Amount

Actions

- Modify Stay
 - Incremental Auth
 - Update Check-Out Date
- Add Charges (Sale Txn)
- Re-print receipt
- Transaction
 - Void
 - Refund
 - Check-Out

Sale Details Tab

- Txn Type:
 - Purchase
 - Delayed Charge
 - No Show
 - Card Deposit
 - Express Service
 - Assured Reservation
- Extra Charge Reasons
 - Restaurant
 - Gift Shop
 - Mini Bar
 - Telephone
 - Laundry
 - Other
- Date / Amount



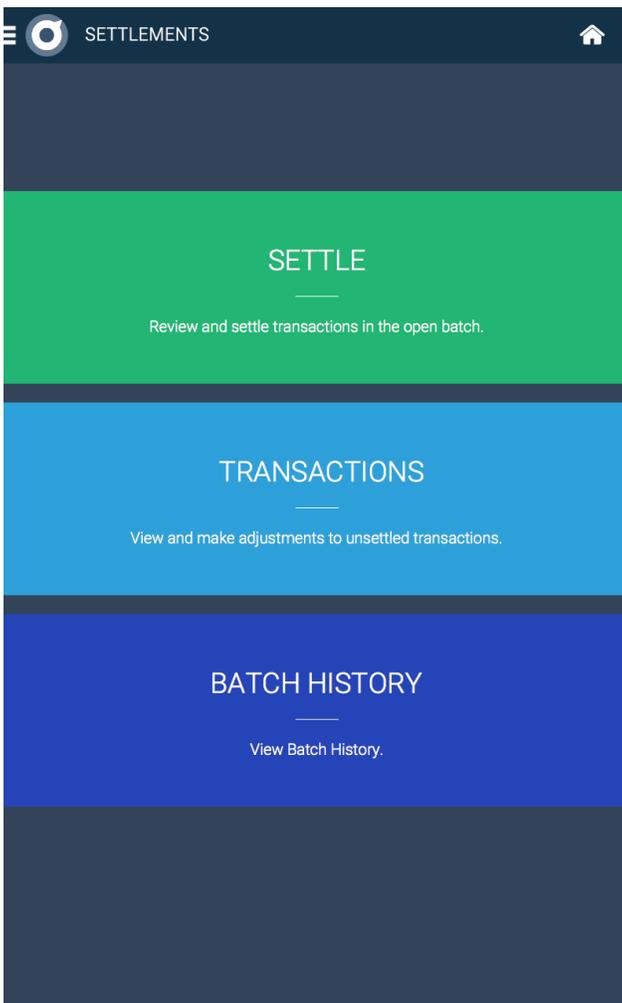
Settlements App

The Settlements App will allow you to review summary information about the current open settlement batch, review detailed transaction information for records in the current batch, process transaction actions such as Void, and submit the settlement for batch close.

You will see the following options:

- "Settle" allows you to review a Settlement Summary of transactions in the Open Batch.
- "Transactions" allows you to view a detailed list of transactions in the Open Batch and/or Awaiting Checkout transactions.
- "Batch History" allows you to view previously generated Settlement Reports.

In addition, you may access Settlements via the web when you log in to your poynt.net merchant account. The same functionality that is in the Settlements App on the terminal is also available on the web. You may also access the same Settlements Batch History reports on web as well.



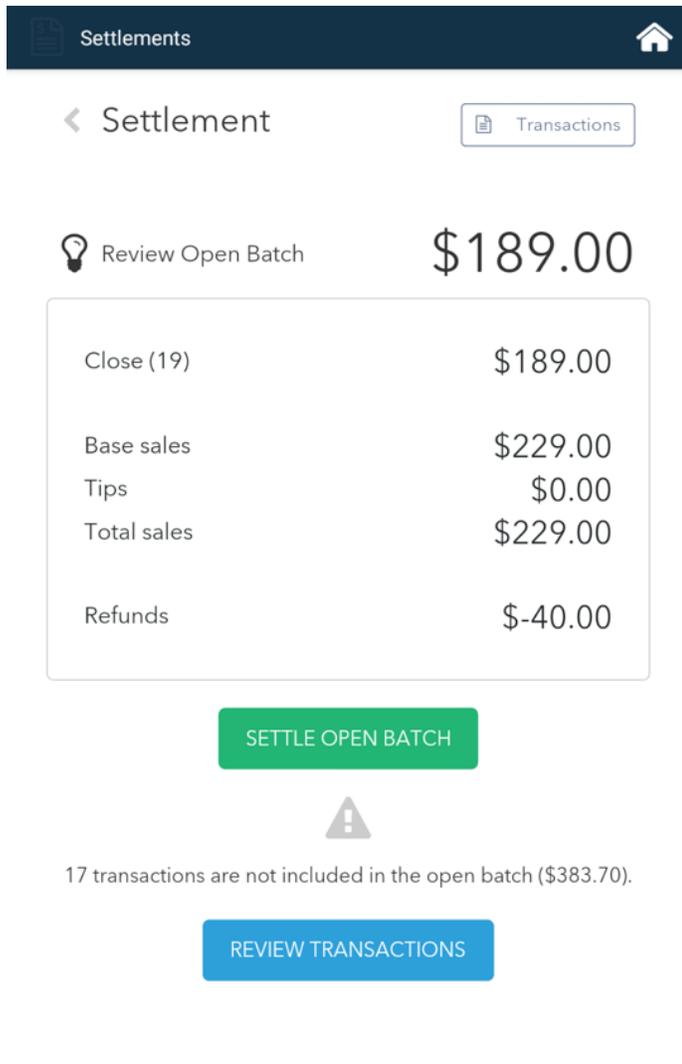
Settlements – Review Summary

When you tap on Settle to review a Settlement Summary of transactions currently in the Open Batch, you will see the below page which display summary amounts for:

- Sales
- Tips (if applicable)
- Refunds (if any)

If you have any Transactions Pending Review (such as Check-In's which have not yet Checked-Out), you will see a button option to **Review Transactions**.

After reviewing the summary and/or Transaction details, and if you are ready, then tap on **Settle Open Batch**.



Settlements 

← Settlement Transactions

 Review Open Batch **\$189.00**

Close (19)	\$189.00
Base sales	\$229.00
Tips	\$0.00
Total sales	\$229.00
Refunds	-\$40.00

SETTLE OPEN BATCH



17 transactions are not included in the open batch (\$383.70).

REVIEW TRANSACTIONS

Settlements – Open Batch Transactions

Tapping on **Review Transactions** will take you to a detailed list of transactions in your **Open Batch**.

The tab for **Open Batch** shows you all transactions (eg Checked-out, Quick Stays, Sale, Refund) which are currently in the Open Settlement Batch. If you need to **Edit** a transaction in order to **Void**, tap on the Edit button. Note: Captured transactions, such as Check-outs, Quick Stays, Sale transactions, can be voided as long as they have not yet been settled.

You can also toggle or tap on the tab heading for **Awaiting Checkout** to review a list of Checked-In stay transactions which have not yet Checked-Out. See next section.

When you have completed your transaction review and are ready to Settle, tap on **Review** button to go back to Summary screen and tap Settle Open Batch.

The screenshots show the 'Settlements' app interface. The top bar is dark blue with 'Settlements' and a home icon. Below is a 'Transactions' header with a search bar and a 'Review' button. The main content area is divided into two tabs: 'Open batch (19)' and 'Awaiting checkout (17)'. The 'Open batch (19)' tab is active, showing a list of transactions with columns for Date, ID/Name, Payment, and Total. Each transaction has an 'EDIT' button. The second transaction in the list is highlighted, and a 'VOID' dialog box is overlaid on it, showing a 'Total' of \$10.00 and a 'VOID' button.

Date	ID/Name	Payment	Total	Action
12/7/2016 10:49:09 PM Rm 159874	#f8f85086 Folio 159847	VISA 1111	\$10.00	EDIT
12/7/2016 10:45:38 PM Rm 2222222	#85edf0a6 Folio 2222222	VISA 1111	\$10.00	EDIT
12/7/2016 10:44:30 PM Rm 258258	#6969e1a8 Folio 258258	VISA 1111	\$10.00	EDIT
12/7/2016 4:19:51 PM	#5f59e3dd	2205	-\$10.00	REFUNDED
12/7/2016 4:17:39 PM Rm 56565	#adc38de1 Folio 56565	VISA 1111	-\$10.00	REFUNDED
12/7/2016 4:16:56 PM	#ced95545	2205	\$5.00	EDIT
12/7/2016 4:16:30 PM	#646fb7d8	2205	\$2.00	EDIT

Settlements – Awaiting Check-Out Transactions

The tab for **Awaiting Checkout** shows you all Checked-In stay transactions which have not yet Checked-Out.

This tab will allow you to manage any old or “stale” Check-In’s which might need to be Voided if they have not been processed in a while. You may individually **Void** each record by tapping on the Edit button. In addition, if you want to “Void All” old Check-In records in this tab, you may use the **Purge All** button. You will then see a pop-up box confirming whether you want to Purge (or Void) All transactions in the Awaiting Checkout tab.

You can also toggle back to the **Open Batch** tab.

When you have completed your transaction review and are ready to Settle, tap on **Review** button to go back to Summary screen and tap Settle Open Batch.

The screenshot shows the 'Settlements' app interface. At the top, there's a dark blue header with 'Settlements' and a home icon. Below it, a white bar contains 'Transactions' with a left arrow and a 'Review' button. A search bar with the placeholder 'id, card, amount' is present. Two tabs are visible: 'Open batch (19)' and 'Awaiting checkout (17)'. The main area displays a list of transactions with columns for Date, ID/Name, Payment, and Total. A red 'PURGE ALL' button is at the top right of the list. Each transaction row includes a blue 'EDIT' button.

Date	ID/Name	Payment	Total	
12/7/2016 9:58:30 PM Rm 357415	#1987f78d Folio 357412	VISA 1111	\$10.00	
12/7/2016 9:53:49 PM Rm 789456	#4bcee0b1 Folio 789456	VISA 1111	\$10.00	
12/7/2016 3:37:04 PM Rm 89898	#11c46212 Folio 89898	VISA 1111	\$10.00	
12/7/2016 3:04:00 PM Rm 4848	#bd03b359 Folio 4848	VISA 1111	\$10.00	
12/6/2016 11:19:57 PM Rm 40104010	#77464c0b Folio 40104010	2205	\$40.05	
12/6/2016 11:14:16 PM Rm 30103010	#a48d61b2 Folio 30103010	2205	\$30.05	

This screenshot is identical to the previous one but includes a confirmation dialog box overlaid on the transaction list. The dialog asks 'Purge 17 transactions? This action is permanent.' and has a red 'CONFIRM' button.

Date	ID/Name	Payment	Total	
12/7/2016 9:58:30 PM Rm 357415	#1987f78d Folio 357412	VISA 1111	\$10.00	
12/7/2016 9:53:49 PM Rm 789456	#4bcee0b1 Folio 789456	VISA 1111	\$10.00	
12/7/2016 3:37:04 PM Rm 89898	#11c46212 Folio 89898	VISA 1111	\$10.00	
12/7/2016 3:04:00 PM Rm 4848	#bd03b359 Folio 4848	VISA 1111	\$10.00	
12/6/2016 11:19:57 PM Rm 40104010	#77464c0b Folio 40104010	2205	\$40.05	
12/6/2016 11:14:16 PM Rm 30103010	#a48d61b2 Folio 30103010	2205	\$30.05	

Settlements – Batch History

After you perform **Settle Open Batch**, you will see the Settlement Report Summary.

You may also tap on **Batch History** which will take you to a detailed list of Settlement Reports for past batches.

You'll see a list of generated Settlement Reports with the most recently settled batch at the top. You can access the same Settlement reports by logging into your poynt.net account > Sales & Reports > Reports for the report in html, pdf, or excel formats.

The Settlement Report shows you a summary of what Sales by card type settled, as well as Tip and Refund totals.

The image displays four screenshots of the Poynt app interface, illustrating the Settlement Report and Batch History screens.

Screenshot 1: Settlement Report

- Batch summary:** Submitted 12/8/2016 5:27:09 AM, Total: \$189.00
- Close (19):** \$189.00
- Sales (16):** \$229.00
 - Visa: \$80.00
 - Mastercard: \$124.00
 - Discover: \$25.00
- Tips:** \$0.00
- Total Sales:** \$229.00
- Refunds:** \$-40.00
- Button:** DONE

Screenshot 2: Batch History

Date/Time	Batch ID	Amount	Details
12/8/2016 5:27:14 AM	#ELAVON-20161208-59167e40	\$189.00	DETAILS
12/7/2016 9:50:42 AM	#ELAVON-20161207-7e9c8c5	\$84.00	DETAILS
12/7/2016 2:47:17 AM	#ELAVON-20161207-63b93d99	\$-10.00	DETAILS
12/7/2016 1:29:20 AM	#ELAVON-20161207-978e02e	\$90.05	DETAILS
12/6/2016 10:49:56 PM	#ELAVON-20161206-9230d26f	\$356.10	DETAILS
12/5/2016 6:52:26 PM	#ELAVON-20161205-5be41ec3	\$283.00	DETAILS
11/29/2016 11:33:36 PM	#ELAVON-20161129-d3e63e8a	\$1232.05	DETAILS
11/17/2016 12:50:27 AM	#ELAVON-20161117-dc309401	\$211.54	DETAILS

Screenshot 3: Settlement Report

Report Summary
Generated: Dec 8, 2016 @ 5:27 am | Batch ID: ELAVON-20161208-59167e40

Close: \$189.00

Sales (16): \$229.00
 Base: \$229.00
 Tips: \$0.00
 Total: \$229.00

Refunds (3): \$-40.00

Summary by cards:

- Visa:** \$70.00
- Sales (8):** \$80.00
Base: \$80.00, Tips: \$0.00, Total: \$80.00
- Refunds (1):** \$-10.00
- Mastercard:** \$94.00
- Sales (7):** \$134.00
Base: \$134.00, Tips: \$0.00, Total: \$134.00
- Refunds (2):** \$-30.00
- Discover:** \$25.00
- Sales (1):** \$25.00

Screenshot 4: Settlement Report

Sales

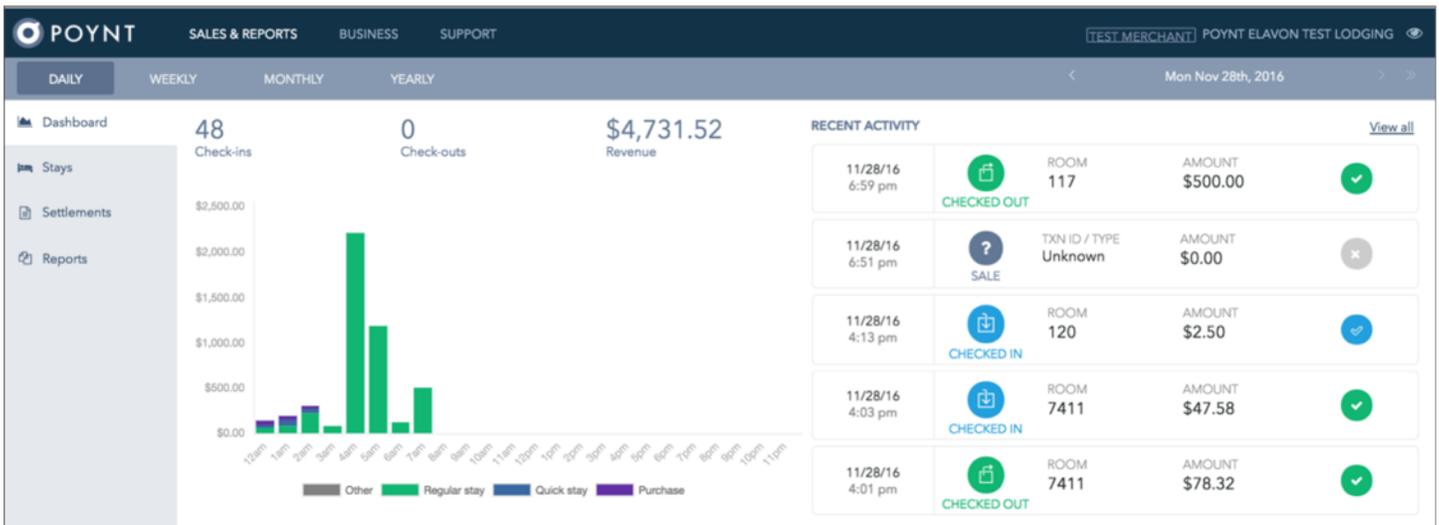
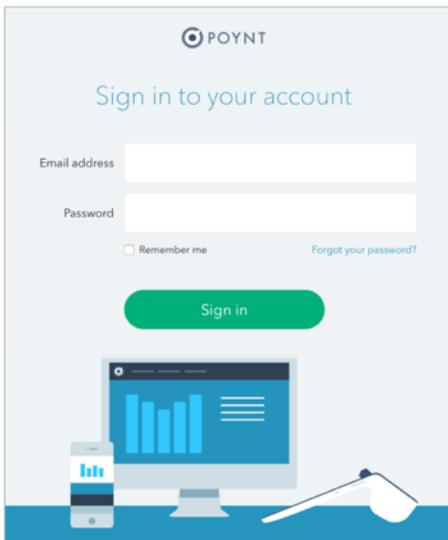
Date	ID, Name	Note	Payment	Total	Emp/lor
12/7/16 9:50 am	#7701d6eb		Mastercard 2205	\$52.00	Test
12/7/16 11:19 am	#b74813c8		Visa 1111	\$10.00	Test
12/7/16 11:43 am	#7f5a21f1		Mastercard 2205	\$20.00	Test
12/7/16 1:30 pm	#6c8a4c3		Visa 1111	\$10.00	Test
12/7/16 2:06 pm	#dc97869f		Visa 1111	\$10.00	Test
12/7/16 2:32 pm	#37737363 TEST TEST VOID		Discover 0041	\$25.00	Test
12/7/16 2:18 pm	#6a709deb		Mastercard 2205	\$10.00	Test
12/7/16 3:06 pm	#95450357		Visa 1111	\$10.00	Test
12/7/16 3:07 pm	#fca9955c		Visa 1111	\$10.00	Test
12/7/16 4:14 pm	#75ce18a5		Mastercard 2205	\$20.00	Test
12/7/16 4:15 pm	#87caca06		Mastercard 2205	\$15.00	Test
12/7/16 4:16 pm	#646b7d8		Mastercard 2205	\$2.00	Test
12/7/16 4:16 pm	#ced95545		Mastercard 2205	\$5.00	Test
12/7/16 10:44 pm	#999e1a8		Visa 1111	\$10.00	Test
12/7/16	#85ed0a6		Visa 1111	\$10.00	Test

Poynt.net HQ Web Portal

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

- View sales and transactions
- Add additional web or terminal users
- Generate reports
- View / set Business Setting
- Upload custom background images for the Poynt terminal

Every new merchant is sent a web invitation email prompting you to set-up an account in Poynt HQ. Simply click on the link to create a password. Upon login you will land on the dashboard page which shows you a summary view of activity for your account.



HQ Web – Lodging Settings

Your Lodging Setup includes a few additional settings you may apply to your Lodging App on your terminal.

Settings:

1. Total Stay Amount vs Room Rate Amount
 - a. By default, the Lodging App will prompt you to enter a **Total Stay Amount** for every new Check-In or Quick Stay transaction. The amount entered will be the amount charged to the guest.
 - b. You may choose to change the default, and instead, configure the Lodging App to prompt for a **Room Rate Amount**. A Room Rate Amount will take the amount entered in and multiply by the Length of Stay.
 - i. For example, if the clerk enters a Room Rate Amount of \$100.00 and the Check-In Date is 12/1/16 and Check-Out Date is 12/3/16 (and Length of Stay = 2), then your Total Stay Amount would be $\$100.00 \times 2 = \200.00 .
2. Folio Number prompt (Default = off)
 - a. If you require additional stay reference number, you may configure the Lodging app to prompt for Folio Number for every transaction.
3. Tax Rate (Default = off)
 - a. If you would like a percentage tax rate to be applied to every transaction in the Lodging app, enter in a percentage. For all transactions, the amount entered will be the base amount. Tax will then be calculated off of the base amount and a final Total Amount will be charged to the guest. Receipts will show a Sub-Total, Tax Amount, and Total.

The screenshot displays the Poynt HQ Web interface for managing a store. The main header includes navigation tabs: SALES & REPORTS, BUSINESS, PRODUCTS, and SUPPORT. The current page is titled "Poynt Elavon Test Lodging" and shows store details such as address (490 S. California Ave, Palo Alto, California 94306), contact information (May May, Owner contact, (408) 936-1234, poynt@poynt.co), and mobile notifications status. A "MANAGE BUSINESS" button is visible.

The "Manage store: Poynt Elavon Test Lodging" modal is open, showing various settings tabs: Basic info, Payment settings, Lodging settings (selected), Merchant screen, Customer screen, and Txn receipts. The "Lodging settings" tab is active, displaying the following options:

- Default stay amount:** Two options are shown: "Total Stay Amount" (selected with a green checkmark) and "Room Rate Amount". The "Total Stay Amount" option is described as "Ask clerk for total stay amount", while the "Room Rate Amount" option is "Ask clerk for room rate per night".
- Folio number:** A toggle switch is currently turned off. The description below it reads "Ask for folio number for every transaction."
- Tax rate:** An input field shows "0 %". Below the field, it says "Enter the tax rate".

A red arrow points from the "MANAGE STORE" button in the store overview to the "Lodging settings" tab. A callout box on the right side of the screen says "Business > Lodging Settings".

HQ Web – Stays List

Once you are logged in to your Poynt.net HQ web account, you may navigate to review a list of your Stay transaction records.

1. Click on **Sales & Reports** at the top navigation and then click on **Stays** tab on the left navigation.
 - a. By default, the Stay List will show a Filtered view of all of your current open **Check-In** stay records.
2. Additional Filtered views are available for:
 - a. Checked-Out stay records
 - b. Quick Stay records
 - c. Non-Stay records (which include any stand-alone Sale transactions processed which were not linked to a Stay (by Room Number)
3. Each Stay record allows you to click on the **Details** button or the **Receipt** button
 - a. Details will show you the transaction history for that Stay
 - b. Receipt will allow you to email a receipt to your guest

The screenshot shows the Poynt HQ Web interface. The top navigation bar includes 'SALES & REPORTS', 'BUSINESS', and 'SUPPORT'. The left sidebar has 'Dashboard', 'Stays', 'Settlements', and 'Reports'. The main content area is titled 'Stays' and displays a table of stay records. A red circle highlights the 'CHECK-INS' filter in the left sidebar. The table shows records for rooms 500, 11111, 11111, 987, 7411, and 777, with columns for Room, Check-In, Check-Out, Stay Total, and Sales Total. Summary statistics at the top right show \$4,731.52 Today, \$4,731.52 Week, \$30,982.11 Month, and \$30,982.11 All time.

Room	Check-In	Check-Out	Stay Total	Sales Total
ROOM 500	Dec 25	Dec 27	\$0.00	\$0.00
ROOM 11111	Dec 5	Dec 9	\$10.00	\$0.00
ROOM 11111	Dec 5	Dec 9	\$0.00	\$0.00
ROOM 987	Dec 4	Dec 8	\$0.00	\$0.00
ROOM 7411	Nov 30	Dec 2	\$47.58	\$0.00
ROOM 777	Nov 30	Nov 30	\$25.00	\$0.00

The screenshot shows the Poynt HQ Web interface with the 'CHECK-OUTS' filter selected in the left sidebar. The table displays records for rooms 55555, 336, 7979, 117, 233, and 777. Summary statistics at the top right show \$4,731.52 Today, \$4,731.52 Week, \$30,982.11 Month, and \$30,982.11 All time.

Room	Check-In	Check-Out	Stay Total	Sales Total
ROOM 55555	Dec 5	Dec 9	\$50.00	\$0.00
ROOM 336	Nov 28	Dec 7	\$80.52	\$0.00
ROOM 7979	Nov 28	Dec 4	\$853.39	\$0.00
ROOM 117	Nov 28	Nov 30	\$500.00	\$0.00
ROOM 233	Nov 28	Nov 30	\$50.00	\$0.00
ROOM 777	Nov 28	Nov 30	\$25.00	\$0.00

4. You may also choose the last filter to view **All Transactions** which will display a list of most recently processed transactions.
5. Additional options:
 - a. You can search for Stay or Transaction by Room Number or Folio Number, as well as card last 4 digits, cardholder first or last name (if recorded), transaction amount, or date.
 - b. You can also filter by specific Transaction statuses.

POYNT SALES & REPORTS BUSINESS SUPPORT TEST_MERCHANT POYNT ELAVON TEST LODGING

Dashboard **Stays** \$4,731.52 Today \$4,731.52 Week \$30,982.11 Month \$30,982.11 All time

Stays CATEGORY

CHECK-INS
CHECK-OUTS
QUICK STAYS
NON-STAY
ALL TRANSACTIONS

SEARCH
Search by item, ID...

STATUS toggle all
 Authorized
 Captured
 Refunded
 Declined
 Voided

TENDER TYPE toggle all
 Credit
 Cash
 Other

VIEW BY DATE

 RESET FILTERS

STATUS	ROOM	TYPE	DATE	DETAILS	ACTIONS	AMOUNT
	117	Checked Out	Nov 28 6:59 pm	Ally Schi... ID #e5c1d699	 	\$500.00
	897	Purchase (Mini Bar)	Nov 28 10:39 am	Lilla Rodr... ID #54622eb1	 	\$34.00
	771	Quick Stay	Nov 28 10:37 am	Akeem D... ID #c06ec155	 	\$77.25
	336	Checked Out	Nov 28 10:25 am	Evelyn H... ID #4230f0b5	 	\$80.52
	6548	Checked In	Nov 28 9:56 am	Greg Grant ID #70e599e3	 	\$50.00
	90	Checked In	Nov 28 9:48 am	Card cust... ID #8c4761c4	 	\$6.90
	9999	Purchase (Laundry)	Nov 28 9:38 am	Clemmie... ID #53ab6d0a	 	\$50.00
	39	Checked In	Nov 28 9:24 am	Kaya Fra... ID #0cb474fd	 	\$75.65
	789	Checked Out	Nov 28 9:09 am	Phyllis Br... ID #7463ac64	 	\$89.00
	39	Checked In	Nov 28 8:50 am	Ronny Ka... ID #d6754206	 	\$75.65
	777	Checked Out	Nov 28 3:42 pm	Kathryne ... ID #00de1779	 	\$80.00
	433	Checked In	Nov 28 3:13 pm	Alfred DL... ID #f3120f94	 	\$100.00

HQ Web – Stay Details

When viewing your Stay List, you may click on the **Details** button to view a display of additional information on that record. This would include information on the Stay status (eg Checked-In, Checked-Out, Quick Stay, etc) as well as Stay-related information (eg Check-In/Out dates).

1. From the Stay list, click on the **Details** button. The Stay Details pop-up will appear.
 - a. In the top color-highlighted box, you will see information on the Stay.
 - i. You can click on **Details** to view the Transaction status history (eg Authorize, Capture, Refund, etc).
 - ii. You can click on **Receipt** to send an Email Receipt to the guest which will include stay information and amount.
 - b. In the bottom box, you will see any associated Sale transactions tied to that Room / Folio. This includes the Sale Transaction type and/or any Extra Charges reasons.
 - i. You can click on **Details** to view the Transaction status history (eg Sale, Refund, etc).
 - ii. You can click on **Receipt** to send an Email Receipt to the guest which will include Sale Type information and amount.

STAY DETAILS DONE ✕

	ROOM 5236	CHECK-IN Nov 20	CHECK-OUT Nov 22	STAY TOTAL \$2.00	SALES TOTAL \$4.40
CHECKED OUT					

	11/19/16 5:13 am	Frieda Blick		...xxxx / #d33f9031			\$2.00
--	---------------------	--------------	--	---------------------	--	--	--------

SALES DETAILS

TIME	TYPE	REASON	TOTAL
Nov 19, 5:11 am	Card Deposit	N/A	\$2.35

	11/19/16 5:11 am	Bernadette Doyle		...xxxx / #cb4608a7			\$2.35
--	---------------------	------------------	--	---------------------	--	--	--------

	ROOM 889	CHECK-IN Nov 21	CHECK-OUT Nov 23	STAY TOTAL \$176.00	SALES TOTAL \$0.00
CHECKED OUT					

[View details about this stay](#)

HQ Web – Email Receipt

When viewing your Stay List, you may click on the **Receipt** button to email a copy of the Stay or Sale receipt to your guest. This email receipt would include information on the Stay Type (eg Check-In, Check-Out, Quick Stay, Sale etc) as well as Stay-related information (eg Check-In/Out dates) or Sale-related information (eg Sale type, Extra Charge reasons).

Example of Email Receipt for Check-Out stay:

View receipt [DONE X]

Email receipt to... [SEND]

POYNT ELAVON TEST LODGING

Nov 29th, 2016 @ 1:59 pm

CHECK OUT

ITEM (1)	AMOUNT
876543210	\$40.00
SUBTOTAL	\$40.00
TAX	\$0.00
ORDER TOTAL	\$40.00
TOTAL PAID	\$40.00

CAPTURE
 Test Test-void
 APPROVAL CODE: 12916R
 ENTRY MODE: MSR

I agree to pay the above total according to my card issuer agreement.

Room #: 876543210
 Check-In: Nov 29, 2016
 Check-Out: Nov 30, 2016
 Length of Stay: 1 Day

View receipt [Receipt]

Example of Email Receipt for Sale transaction:

POYNT SALES & REPORTS BUSINESS SUPPORT [TEST MERCHANT] POYNT ELAVON TEST LODGING

Dashboard **Stays** \$4,731.52 Today \$4,731.52 Week \$30,982.11 Month \$30,982.11 All time

CATEGORY: CHECK-INS, CHECK-OUTS, QUICK STAYS, NON-STAY, ALL TRANSACTIONS

SEARCH: Search by item, VIEW BY DATE, RESET FILTERS

View receipt [DONE X]

Email receipt to... [SEND]

POYNT ELAVON TEST LODGING

Nov 29th, 2016 @ 2:08 pm Order ID: b22123a0

SALE

Type of sale: Purchase
 Reason: Mini Bar

ITEM (1)	AMOUNT
999999	\$30.00
SUBTOTAL	\$30.00
TAX	\$0.00

Updated 11/29/16 @ 3:08 pm

Receipt \$30.00

Receipt

HQ Web – Lodging Transaction Report

Once you are logged in to your Poynt.net HQ web account, you may navigate to generate Transaction Reports for your Lodging Stays and Sales.

1. Click on **Sales & Reports** at the top navigation and then click on **Reports** tab on the left navigation.
 - a. You can choose to generate Transaction Report across all terminals (if you have more than one) or for a specific terminal.
 - b. In addition, you can generate reports by specific Employees as well; report will show only those transactions processed by that employee's terminal user login.
 - c. You can choose a specific date or a date range for the report.
2. Reports are available in html, pdf (printable view), or excel formats.
3. Lodging Transaction reports will show:
 - a. Summary break-downs by Stay type (eg Check-In, Check-Out, Quick Stay, Sale)
 - b. Each section will contain detail transaction rows relevant Stay Info or Sale Info

Poynt Elavon Test Lodging				
Transactions across all terminals				
Report Period: Nov 18, 2016 – Nov 30, 2016				
Generated: Nov 29, 2016 @ 11:34 pm				
Total # Txns: 193				
Breakdown				
Net Total				\$14,349.73
Total check-ins (64)				\$7,429.14
Total check-outs (52)				\$5,628.74
Total quick stays (19)				\$588.23
Total sales non-lodging (21)				\$621.06
Check Ins				
Room	Check-in	Check-out	Stay Total	Sales Total
35768	12/4/16	12/5/16	\$1,070.05	\$0.00
14000	11/29/16	11/30/16	\$0.00	\$0.00
7773	11/29/16	11/30/16	\$0.00	\$0.00
8889	11/29/16	11/30/16	\$25.00	\$0.00
7963	11/29/16	12/8/16	\$325.00	\$0.00
7555	11/29/16	12/2/16	\$0.00	\$0.00
Check Outs				
Room	Check-in	Check-out	Stay Total	Sales Total
456123	12/1/16	12/2/16	\$10.00	\$0.00
7654321	11/29/16	11/30/16	\$40.00	\$0.00
876543210	11/29/16	11/30/16	\$40.00	\$0.00
Quick Stays				
Room	Check-in	Check-out	Stay Total	Sales Total
6543210	11/29/16	11/30/16	\$22.00	\$0.00
987654321	11/29/16	11/30/16	\$20.00	\$0.00
2222	11/28/16	11/29/16	\$55.74	\$0.00
887	11/28/16	11/29/16	\$0.00	\$0.00
771	11/28/16	12/2/16	\$77.25	\$0.00
300	11/28/16	11/30/16	\$25.00	\$0.00
300	11/29/16	11/29/16	\$5.00	\$0.00

Sales Non-Lodging										
Date	ID	Program ID	Extra charge reasons		Total					
11/29/16 2:08 pm	#43b14ffc	purchase	mini bar		\$30.00					
11/29/16 1:06 pm	#8281bae0	delayed charge	gift shop, laundry, mini bar, other, restaurant, telephone		\$25.00					
11/29/16 7:42 am	#82f97d9f	express service			\$36.99					
11/29/16 7:09 am	#863036e0	purchase	laundry, mini bar		\$36.90					
11/29/16 6:00 am	#0189e170	no show			\$1.10					
11/29/16 5:55 am	#83cc78c7	no show			\$8.00					
11/29/16 5:45 am	#470e132d	purchase	telephone		\$5.00					
11/29/16	#18857b7a	no show			\$5.00					
Card Refunds										
Date	ID/Note	Cardholder	Total	Tip	Cashback	Employee	Room number	Folio number	Program ID	Extra charge reasons
11/18/16 7:21 am	#85d66fd0	Visa 0010 USPERSO CARD04	-\$993.30	\$0.00	\$0.00	Manager Manager				
11/18/16 7:21 am	#9647e929	Visa 0010 USPERSO CARD04	-\$385.00	\$0.00	\$0.00	Manager Manager				
11/18/16 8:19 am	#b9b3142e	Mastercard 2124	-\$2,540.86	\$0.00	\$0.00	Manager Manager				
11/18/16 8:22 am	#136e4ef7	Visa 0010 USPERSO CARD04	-\$40.00	\$0.00	\$0.00	Manager Manager				
11/18/16 8:23 am	#1dad44e	Visa 0010 USPERSO CARD04	-\$29.99	\$0.00	\$0.00	Manager Manager				
Card Declines										
Date	ID/Note	Cardholder	Total	Tip	Cashback	Employee	Room number	Folio number	Program ID	Extra charge reason
11/22/16 10:42 am	#602c54f6	Visa 0043 VISA TEST CARD 4	\$49.98	\$0.00	\$0.00	Manager Manager	804			
11/25/16 6:55 am	#4aceabfa	Mastercard 4111 Card 04 DI Test	\$66.55	\$0.00	\$0.00	Manager Manager	882			
11/25/16 6:55 am	#824b31a3	Mastercard 4111 Card 04 DI Test	\$66.55	\$0.00	\$0.00	Manager Manager	882			
Card Voids										
Date	ID/Note	Cardholder	Total	Tip	Cashback	Employee	Room number	Folio number	Program ID	Extra charge reasons
11/29/16 9:50 am	#defc5845	Visa 0119 Card 03 DI Test	\$69.00	\$0.00	\$0.00	Manager Manager	69			
11/29/16 11:41 am	#9bbf59b5	Visa 0119 Card 03 DI Test	\$90.00	\$0.00	\$0.00	Manager Manager	7962			
11/29/16 11:45 am	#2bc88ea2	Visa 0119 Card 03 DI Test	\$100.07	\$0.00	\$0.00	Manager Manager	7555			
11/29/16 12:48 pm	#3bacf230	Visa 0119 Card 03 DI Test	\$25.00	\$0.00	\$0.00	Manager Manager	7773			
11/28/16 1:13 pm	#32b07053	Mastercard 3003	\$2.50	\$0.00	\$0.00	Manager Manager	120			

HQ Web – Settlement

Once you are logged in to your Poynt.net HQ web account, you may navigate to review and submit Open Batch Settlements. You can settle via the web with the same functions as on the Poynt terminal.

1. Click on **Sales & Reports** at the top navigation and then click on **Settlements** tab on the left navigation.
2. On web Settlements, you can view Summary amounts for Sales, Tips (if applicable), and Refunds (if any) and by card type.
 - a. If you have Checked-Out stays, Quick Stay, or Sale transactions waiting to be settled, you will see those transactions in the **Open Batch** tab.
 - b. If you have any Check-In's not yet checked out, you can view and/or Void those from the **Awaiting Checkout** tab.
3. From either tab, you can also Void captured transactions which have not yet settled.
4. 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.

The screenshot displays the Poynt HQ Web Settlements interface. At the top, there are navigation tabs for SALES & REPORTS, BUSINESS, and SUPPORT. The user is logged in as TEST_MERCHANT. The main content area is titled 'Settlements' and includes a 'RESTART' button. Below this, there are two main sections: 'SETTLE ALL TERMINALS' and 'REVIEW OPEN BATCH'. The 'REVIEW OPEN BATCH' section shows a summary of the current batch: 'Close (6) \$162.00'. A breakdown of sales is provided: Base (\$162.00), Discover (\$162.00), Total (\$162.00), and Refunds (0) (\$0.00). A green 'SETTLE OPEN BATCH' button is prominently displayed. Below this, there is a 'REVIEW TRANSACTIONS' section with a warning icon and text: '7 transactions are not included in the open batch (\$1,241.55)'. A search bar is available for filtering transactions. The 'Open batch (6)' tab is selected, showing a list of transactions. A 'PURGE ALL' button is highlighted in a red box. The table of transactions includes columns for DATE, ROOM #, ID/NAME, PAYMENT, TOTAL, and actions (CAPTURE and VOID).

DATE	ROOM #	ID/NAME	PAYMENT	TOTAL	CAPTURE	VOID
11/30/16 12:41 am	35768	#0d630483 VISA ACQUIRER TEST CAR...	VISA 0010	\$1,070.05	CAPTURE	VOID
11/18/16 9:49 pm	None	#9b6d37d4	DISCOVER 1111	\$20.00	CAPTURE	VOID
11/18/16 9:40 pm	None	#f7bcdec3 YICHUN MAY SLATER	DISCOVER 1010	\$100.00	CAPTURE	VOID
11/18/16 3:17 pm	None	#f05056d0 SYED F ASAR	VISA 3940	\$13.00	CAPTURE	VOID
11/10/16 3:32 pm	None	#42a355a5 DISCOVER TESTCARD	DISCOVER 1111	\$11.00	CAPTURE	VOID
11/10/16 1:45 am	None	#dad5a3fa DISCOVER TESTCARD	DISCOVER 1111	\$5.50	CAPTURE	VOID
11/10/16 1:39 am	None	#ad8eafc2 DISCOVER TESTCARD	DISCOVER 1111	\$22.00	CAPTURE	VOID