



Merchant Overview

# Outline

- 01** Poynt
- 02** Terminal Overview
- 03** Product Demo
- 04** Poynt.net HQ

# 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



# 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

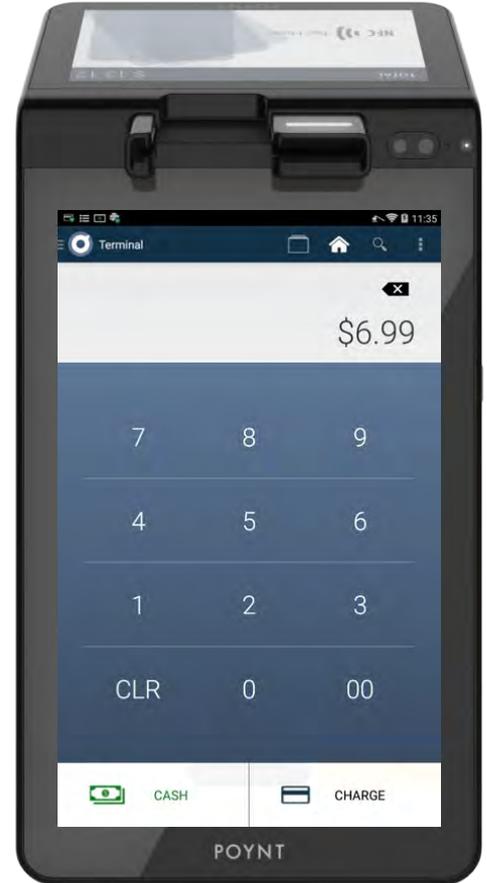
*Getting started with the Poynt Smart Terminal*

# 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

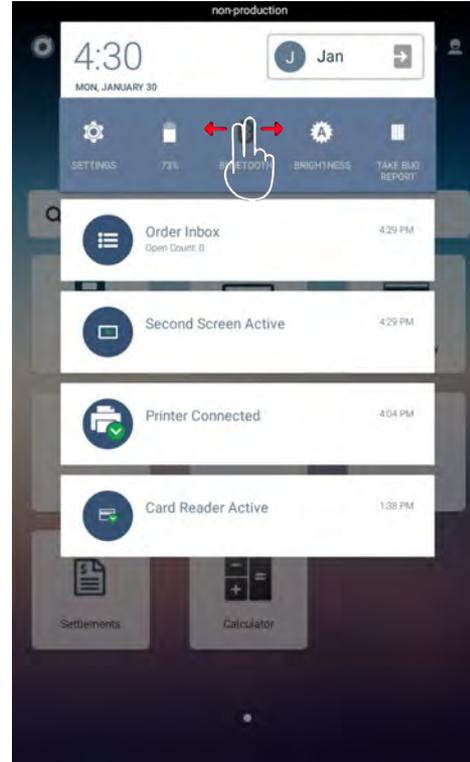
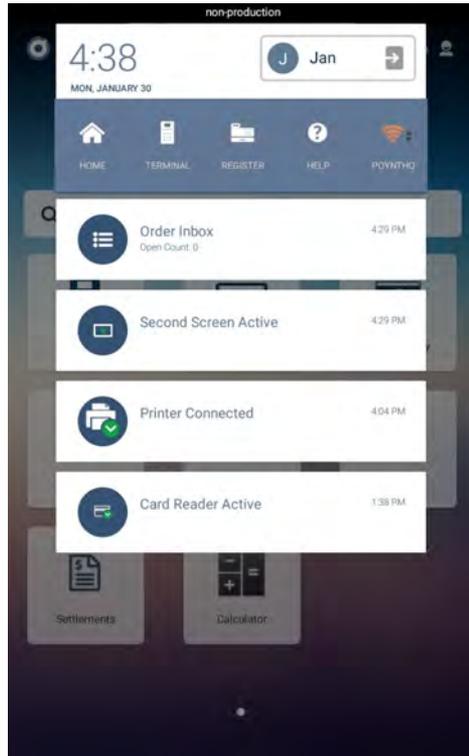
There’s an Ethernet port on the back of the power dock. To use it, the Poynt device must remain in its dock.

# 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

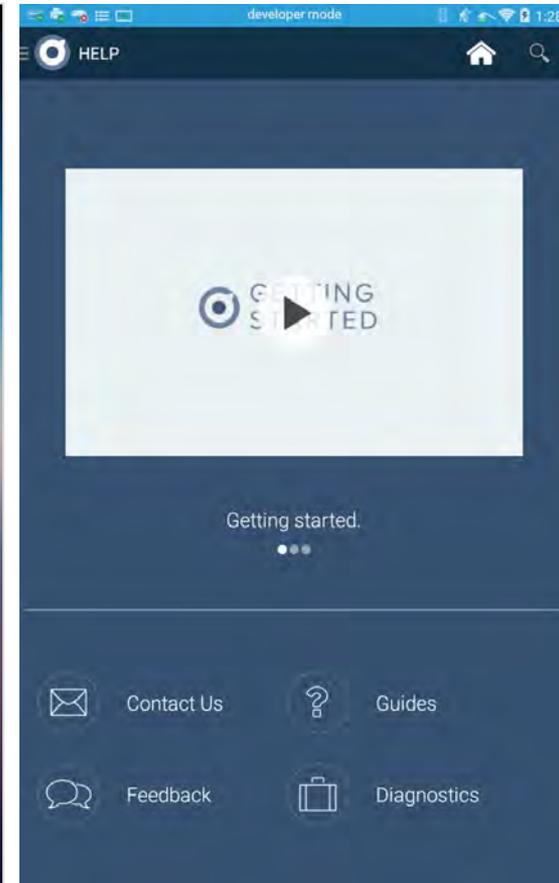
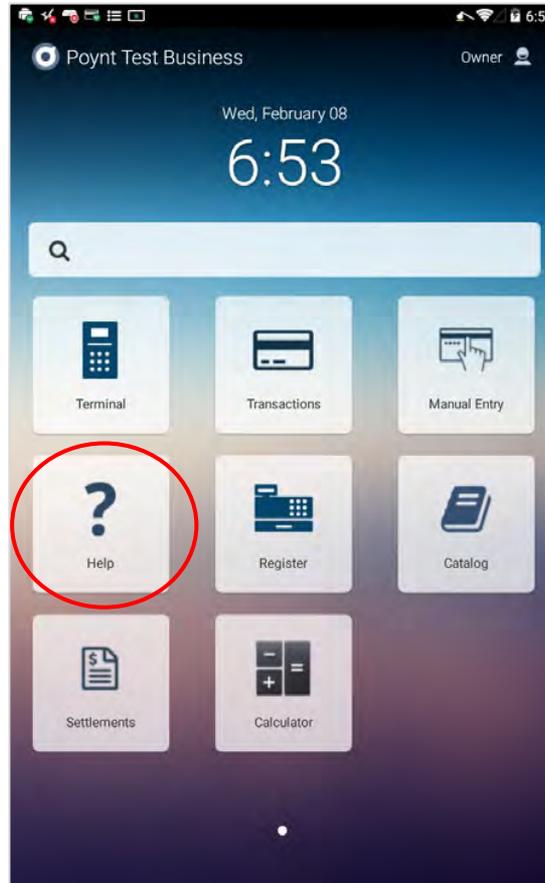
1. **Business:** Displays business information associated with the terminal.
2. **Store:** Displays store information associated with the terminal.
3. **Payments:** Displays payment settings for the terminal including payment types, tip / receipt management, and saved transaction settings.
4. **Business 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



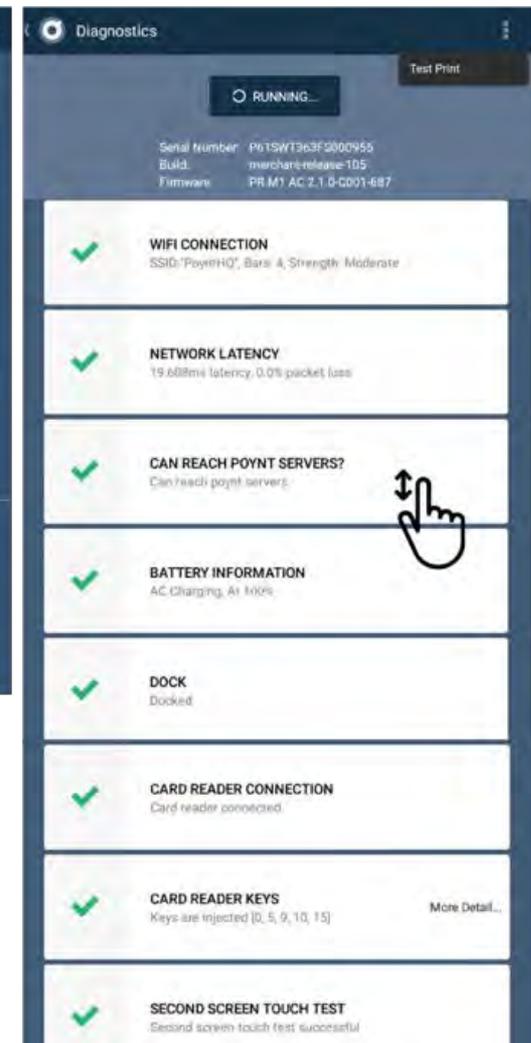
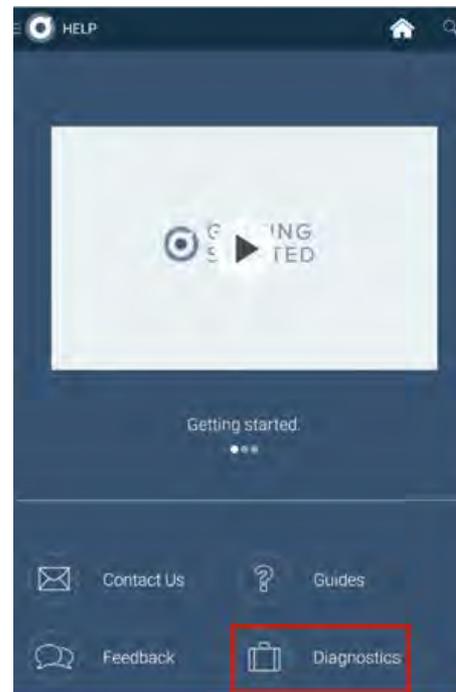
# Diagnostics App:

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](mailto:support@poynt.com) for questions.*



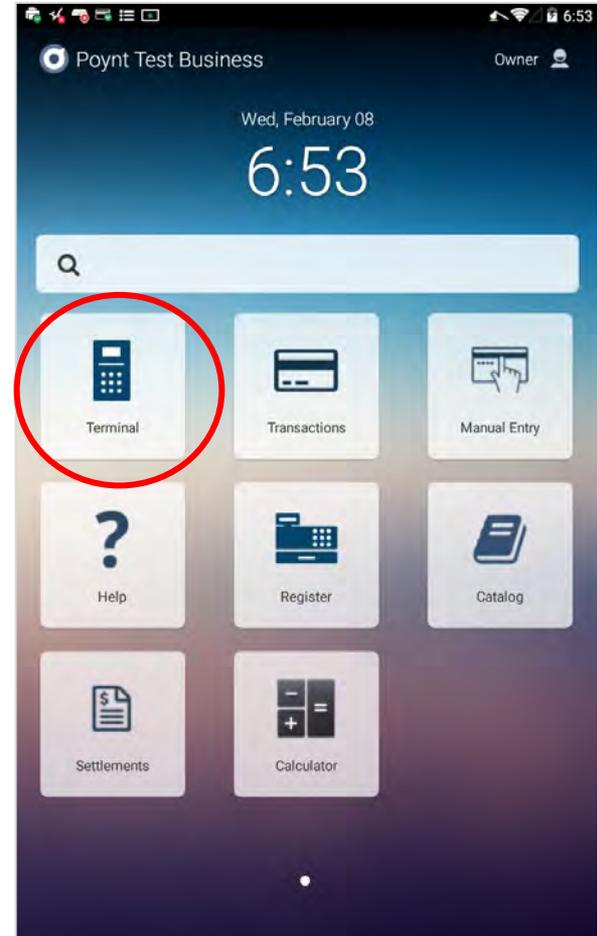
# Transactions

*How to accept payments with Poynt*

# Terminal App

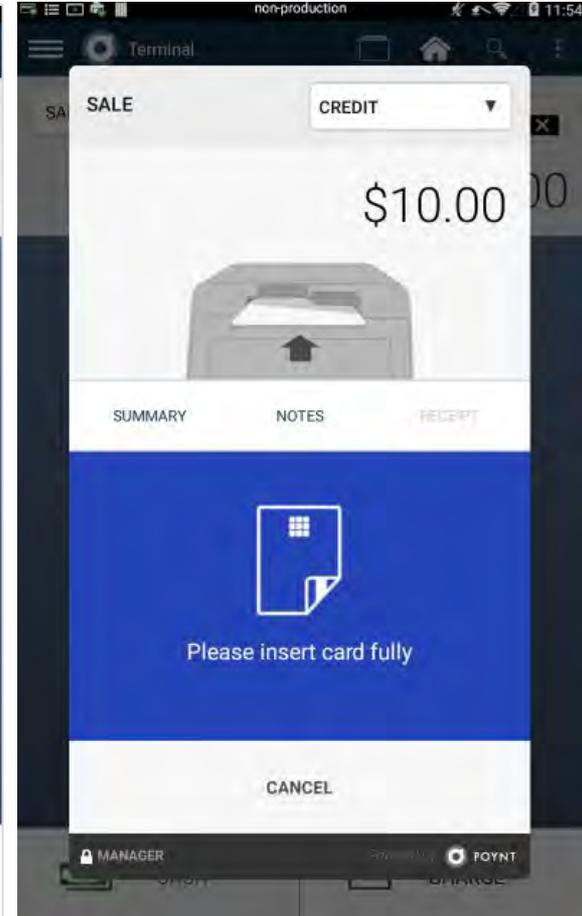
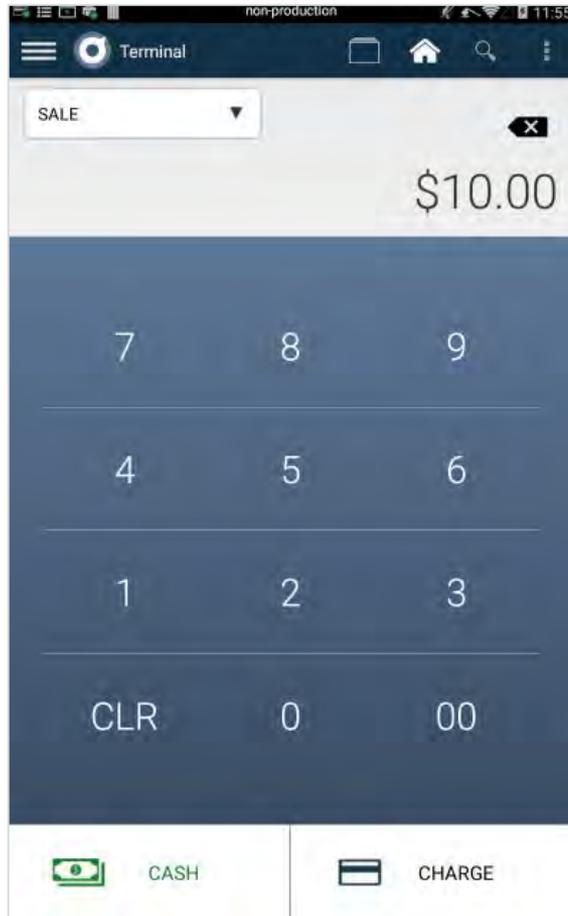
To start accepting credit card transactions, simply tap on the 'Terminal' app, enter the amount, and swipe the card. Customers can choose to have their receipt printed, emailed, SMS text messaged, or no receipt.

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.



# Credit Card Transaction: Customer Screen

Select TIP \$10.00

15% (\$1.50)	18% (\$1.80)	20% (\$2.00)
-----------------	-----------------	-----------------

NO TIP    CUSTOM

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).



Please Sign \$10.00

x

I agree to pay the transaction amount in accordance with my card agreement. Card ending in 0119

CLEAR    DONE

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

Choose Receipt \$10.00

**Please remove your card.**

NO RECEIPT	PAPER RECEIPT
EMAIL	SEND TEXT

\* Text messaging rates may apply based on your plan with your mobile phone carrier.

*Boom. The transaction is complete.*



# NFC Transaction

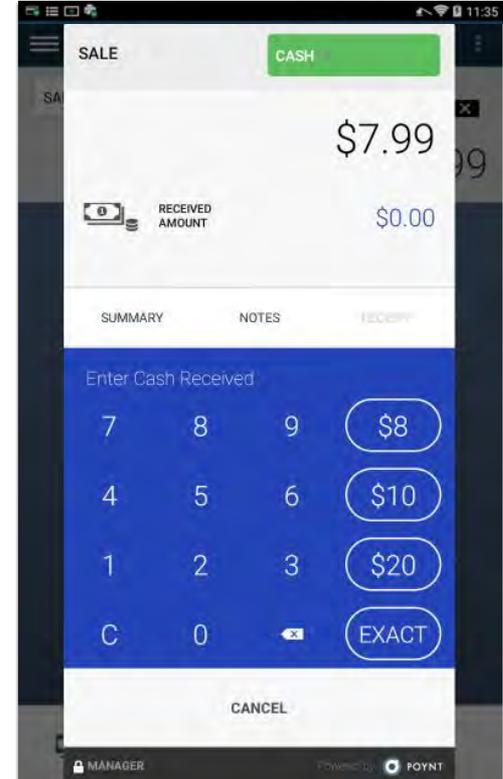
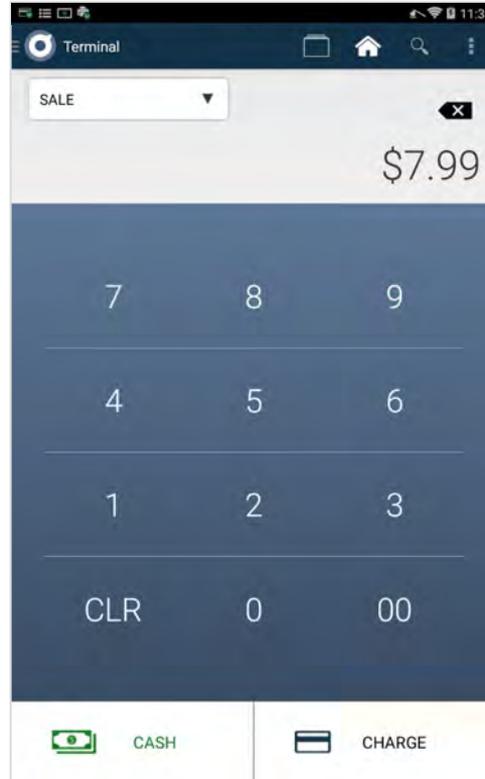
1. Enter the amount on the Terminal app and tap 'CHARGE'.
2. Customer should activate their mobile wallet and hold it near the screen.
3. Upon confirmation of the payment method, the customer will be prompted to enter a tip amount and/or on-screen signature (if these settings are enabled).
4. Customers 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.

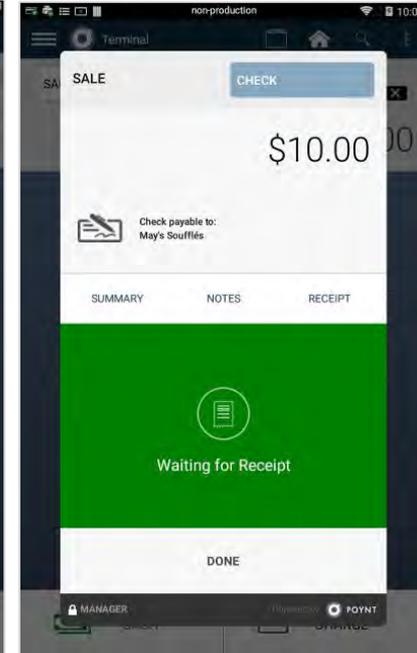
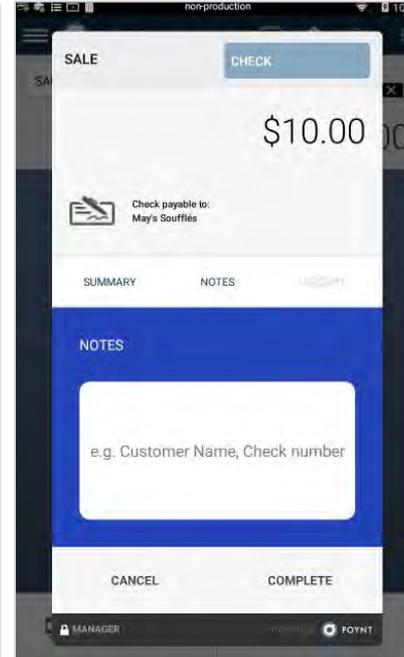
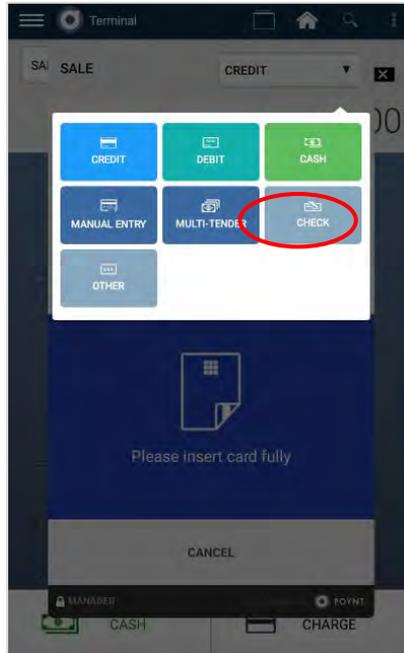
1. Enter the amount on the terminal app and tap 'CASH'.
2. Enter the amount of cash received using keypad or shortcut keys which shows common bills, and then tap 'COMPLETE'.
3. Customers can then choose to have an email, paper, SMS Text, or No receipt.
4. Success. The transaction is complete.



# 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'

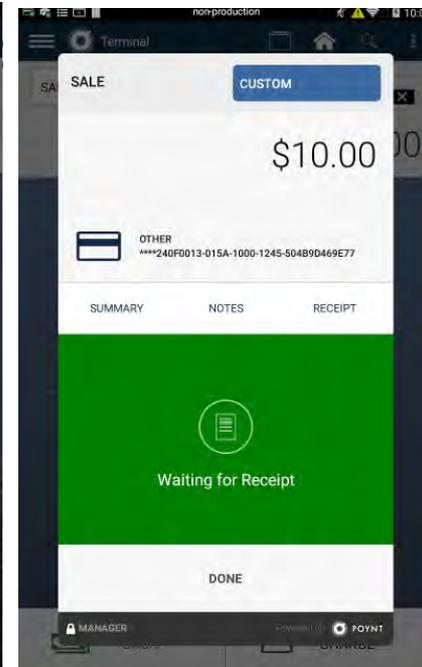
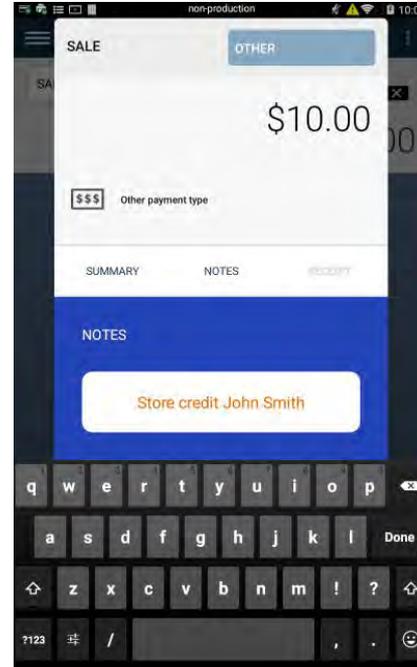
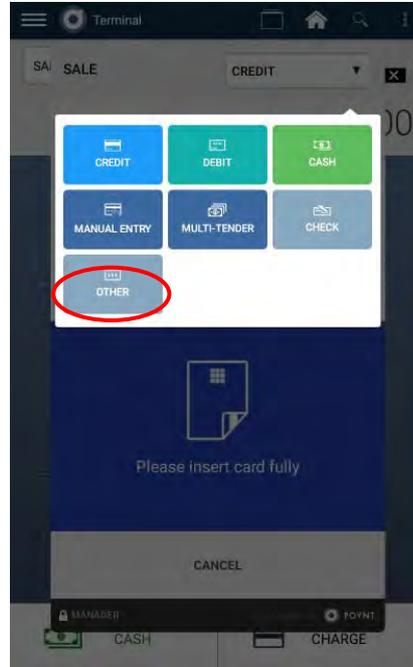


**Suggestion:** type in the Customer's Check Number in the Notes field for tracking purposes. The notes will appear in the merchant's Transaction Report.

# More Payment Options - Other

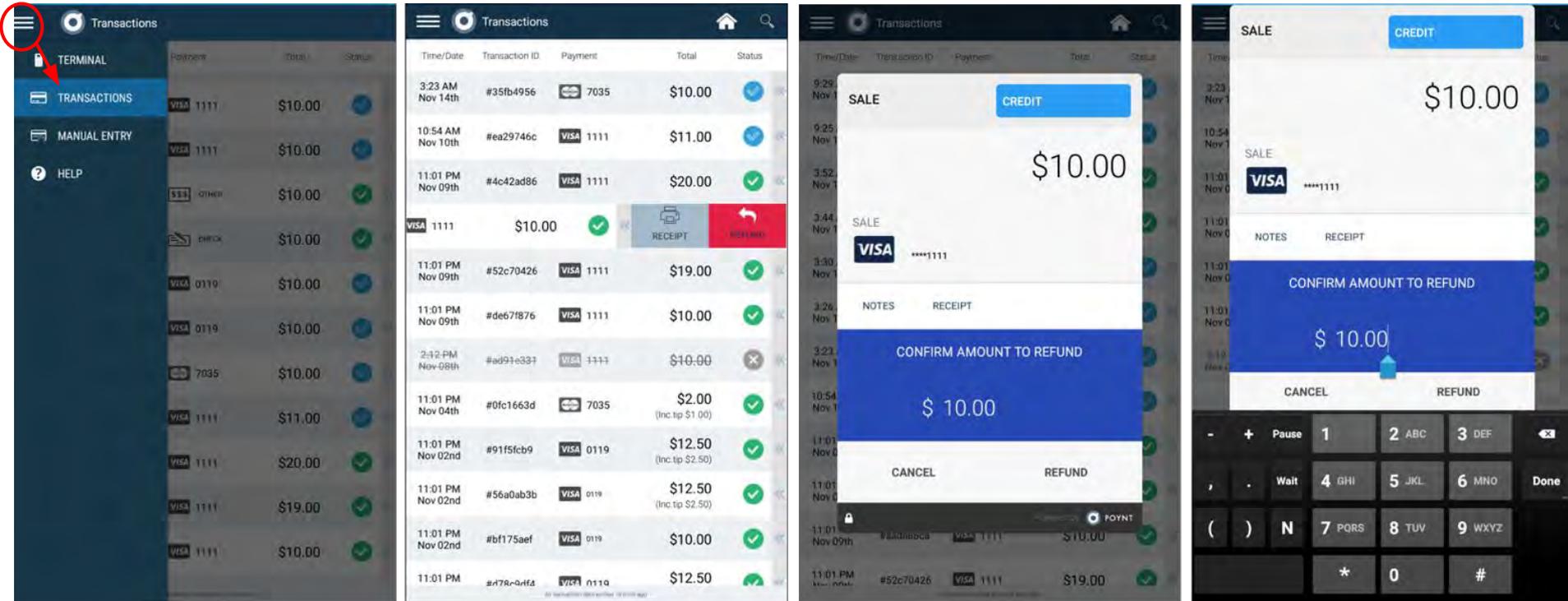
For tracking transactions paid by Other payment tender types, such as Gift Cards, Vouchers, Store Credit, etc:

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

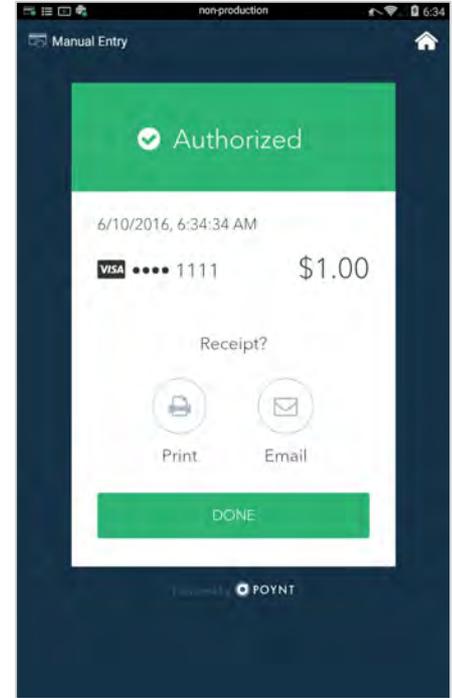
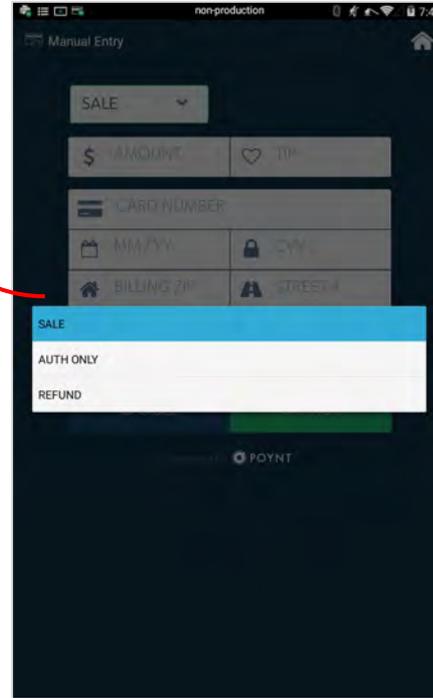
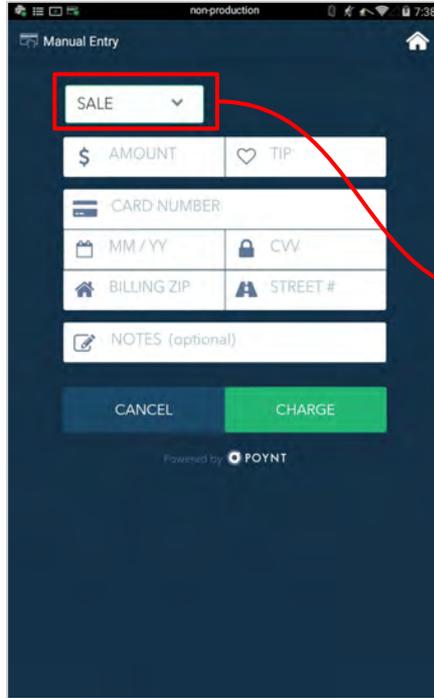
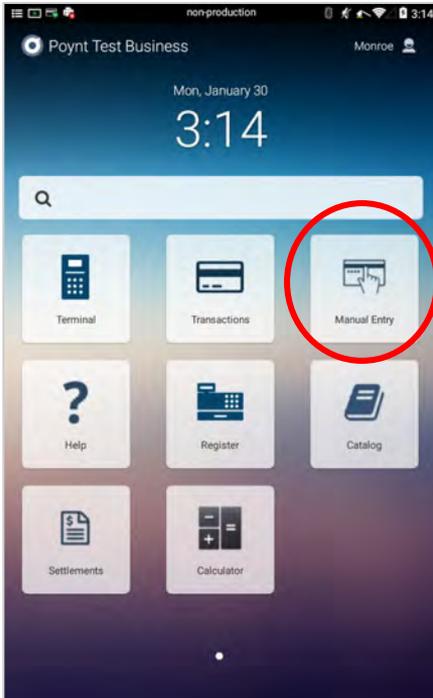
To refund a previous transaction, tap the Terminal menu (left side) > and go to Transactions list. You can swipe a transaction row to the left for a shortcut to Refunds. When you pull up a specific transaction, tap "Refund". You'll be asked to confirm your refund amount. If you need to enter a Partial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

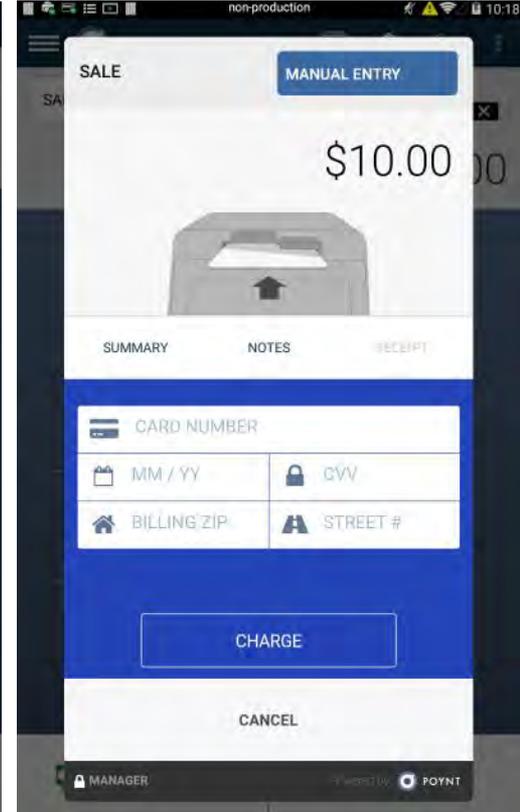
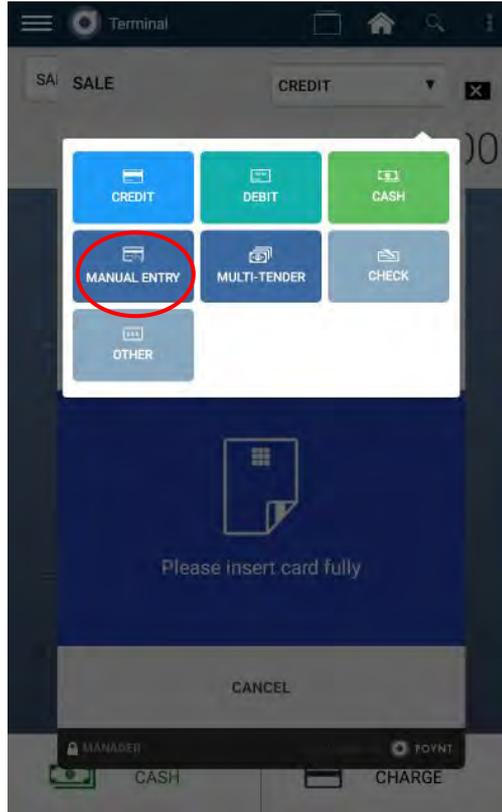


**Note:** Manual Entry App is available for certain merchant configurations depending on processor.

# 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.

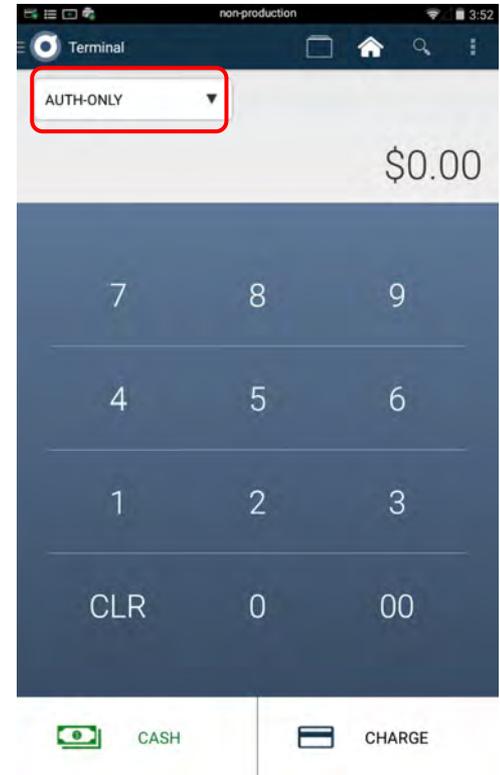
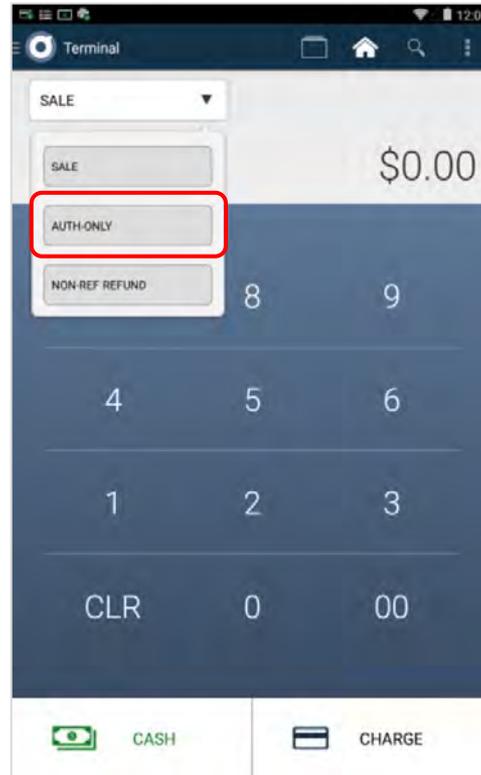
# Auth-only Transaction

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.

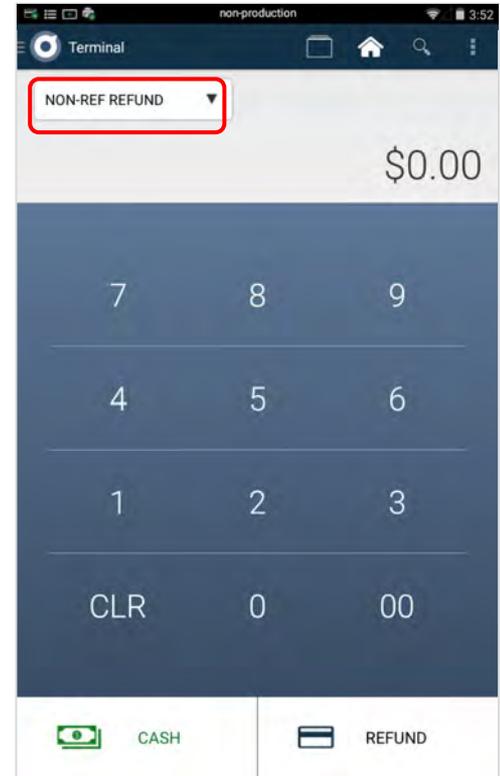
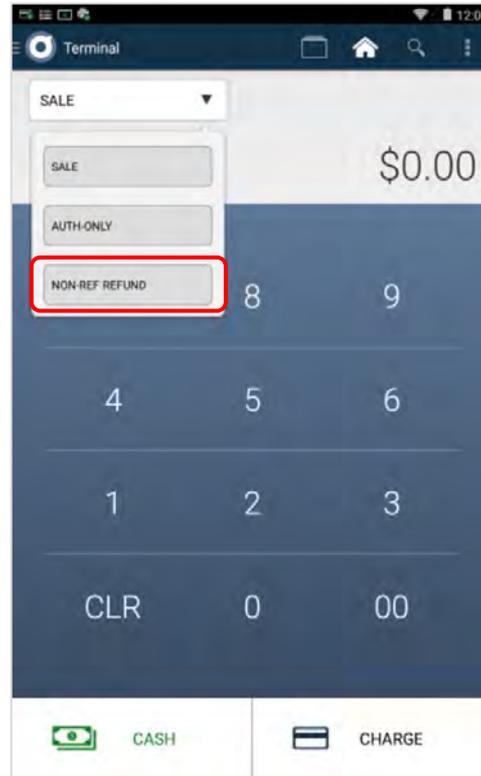


# Non-referenced Refund

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.)*

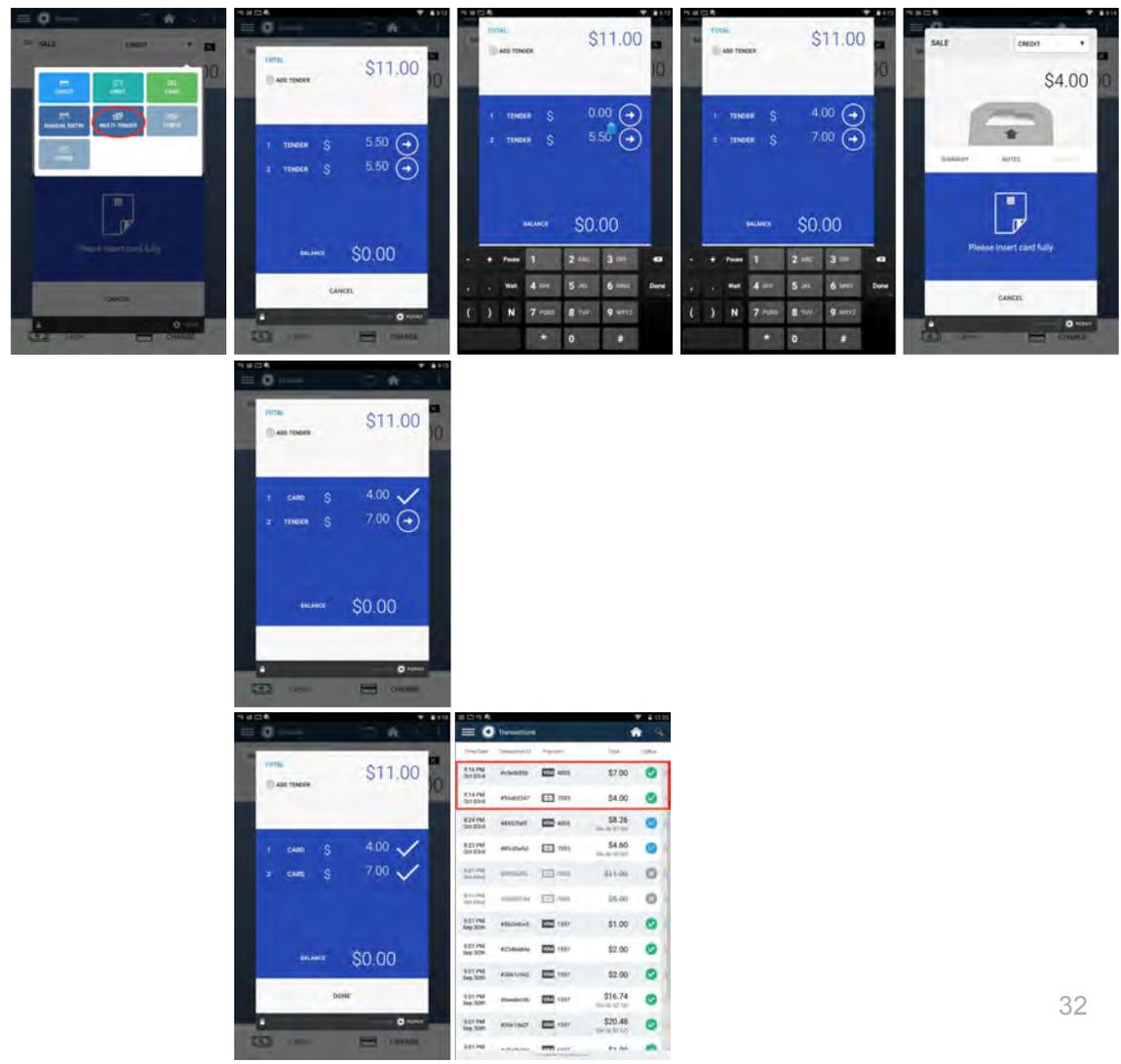


# Multi-Tender

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.*



# Menu Options - Add Custom Notes

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.

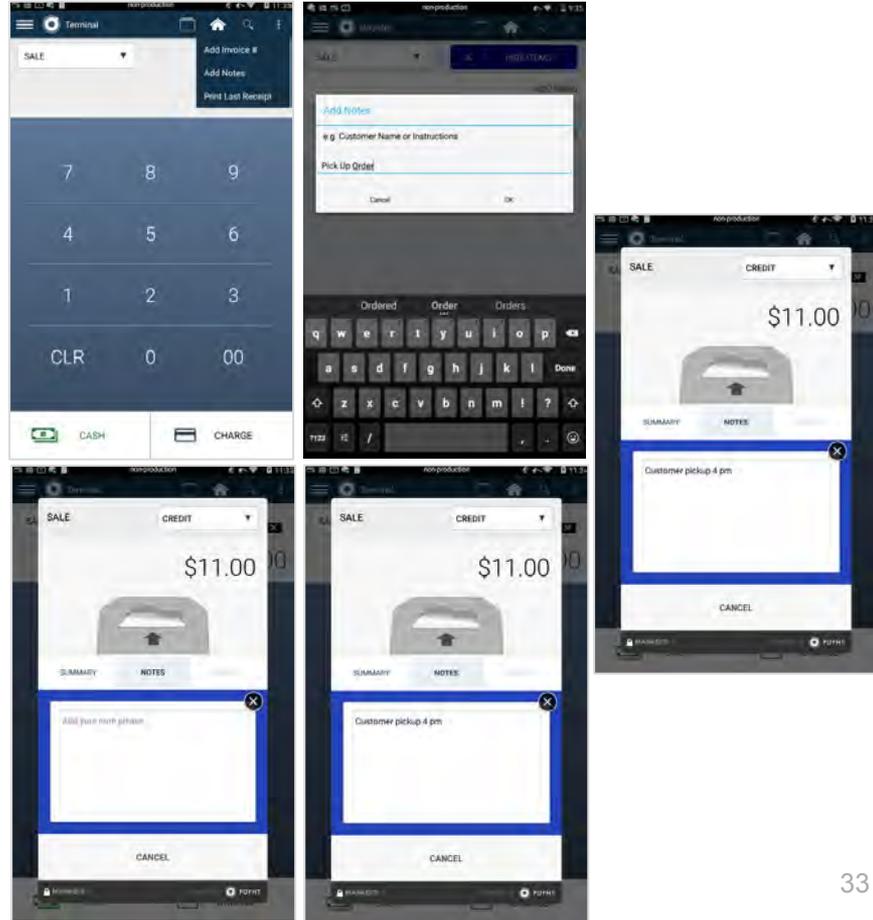
Option 1



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.

Option 2

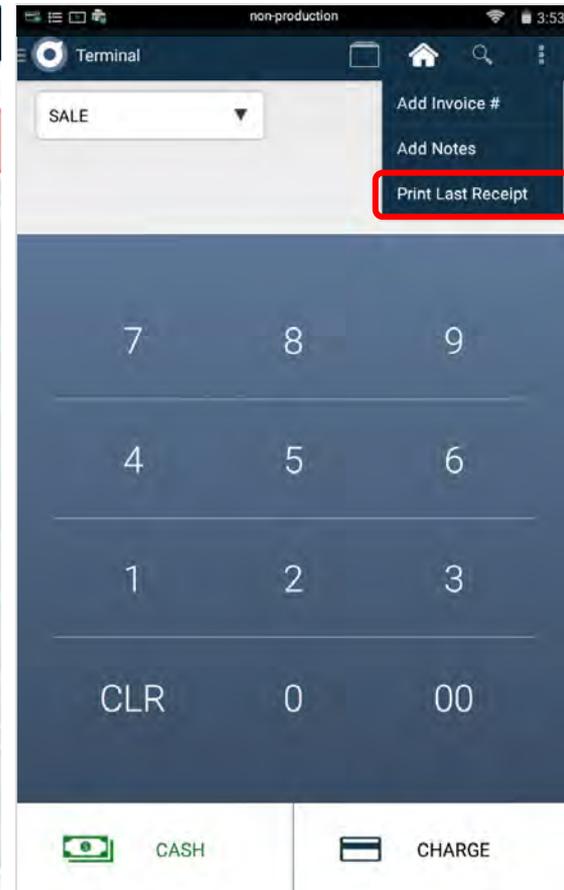
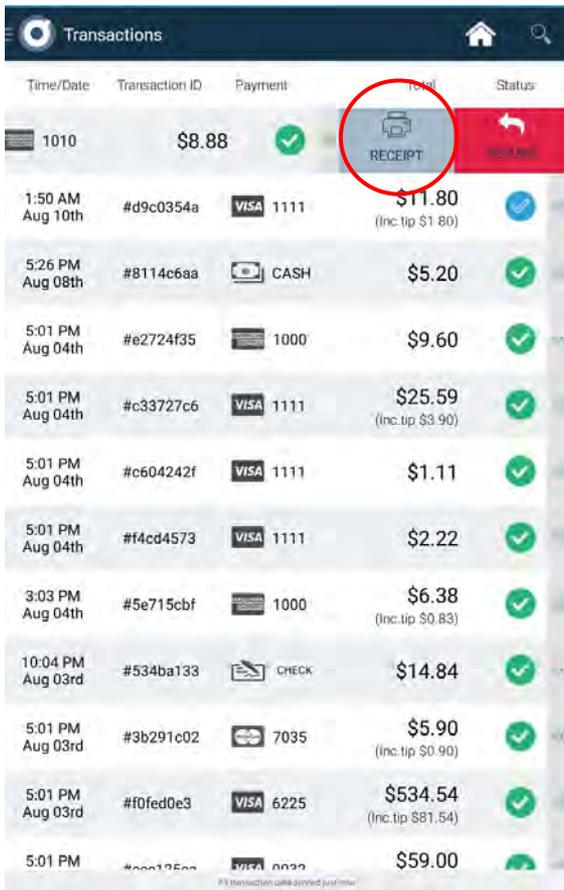


# Menu Options - Print Last Receipt & Receipt Shortcut

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.*



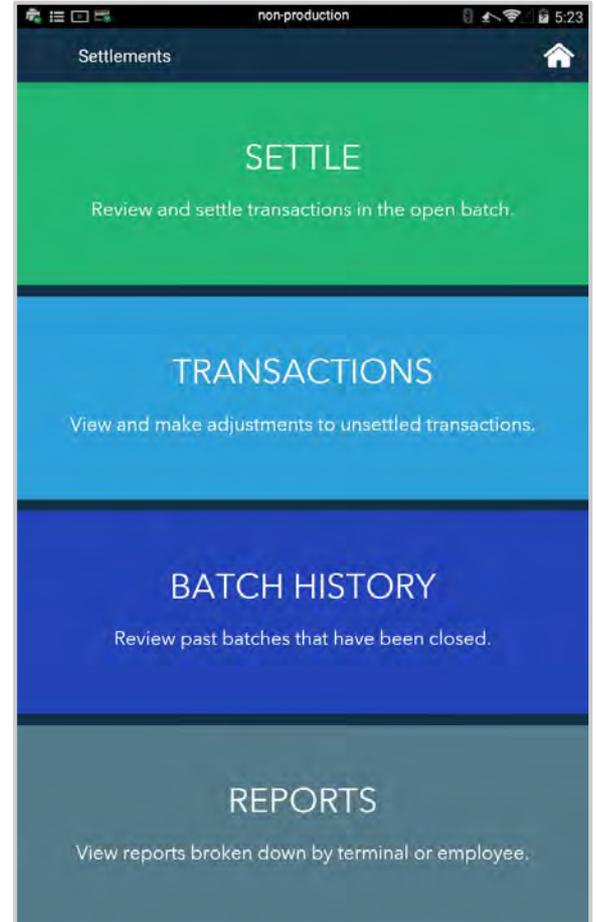
# Settlements

*How to settle transactions with Poynt*

# Settlements

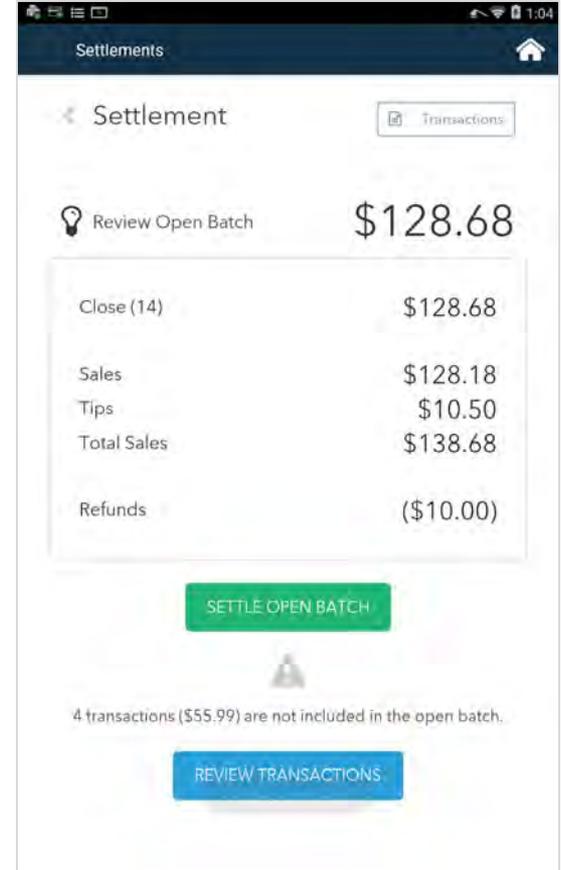
Refer to the Help Center [support.poynt.com](https://support.poynt.com) for guides on How to Settle

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](https://poynt.net/settlements)
  - b. Auto: Merchants can also set up an auto-settlement time by going to [poynt.net](https://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



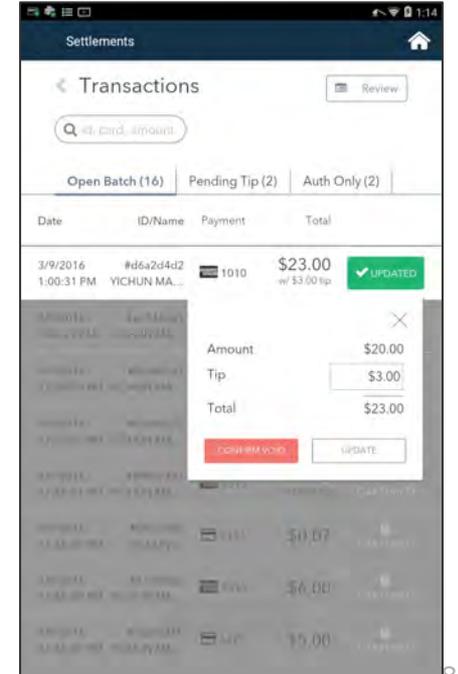
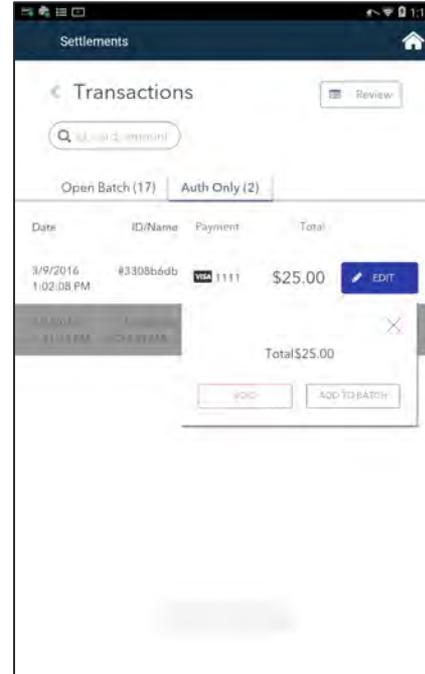
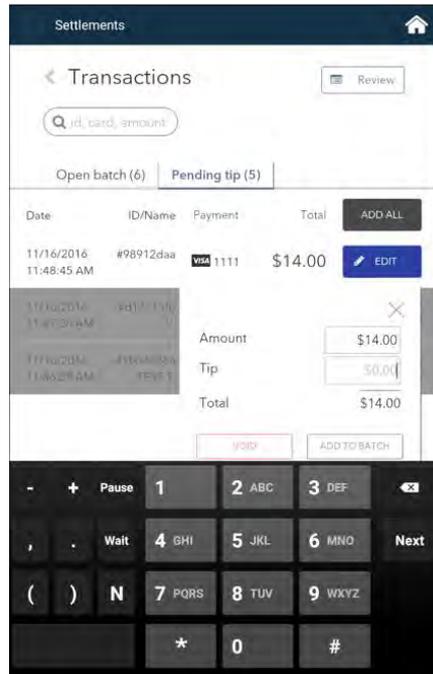
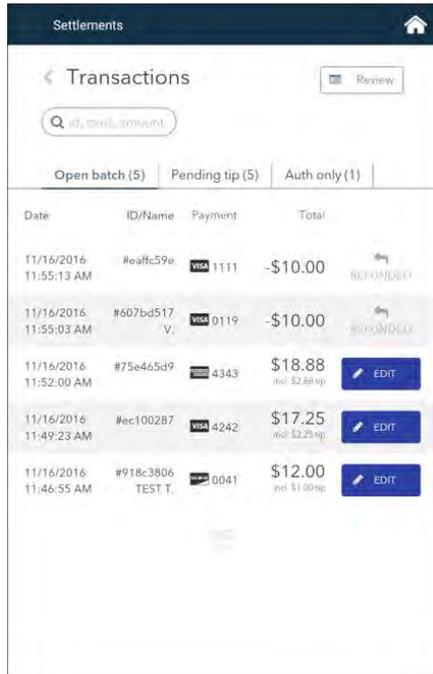
# Settlements - Summary

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”



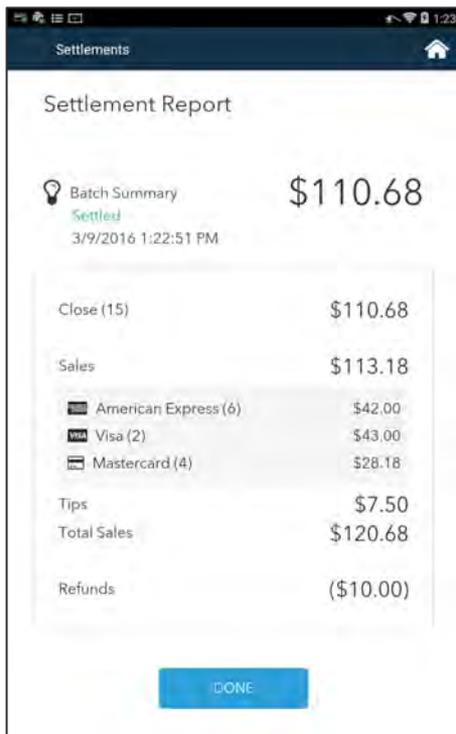
# Settlements - Review Transactions

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.



Settlements

## Settlement Report

Batch Summary Settled \$110.68  
3/9/2016 1:22:51 PM

Close (15) \$110.68

Sales \$113.18

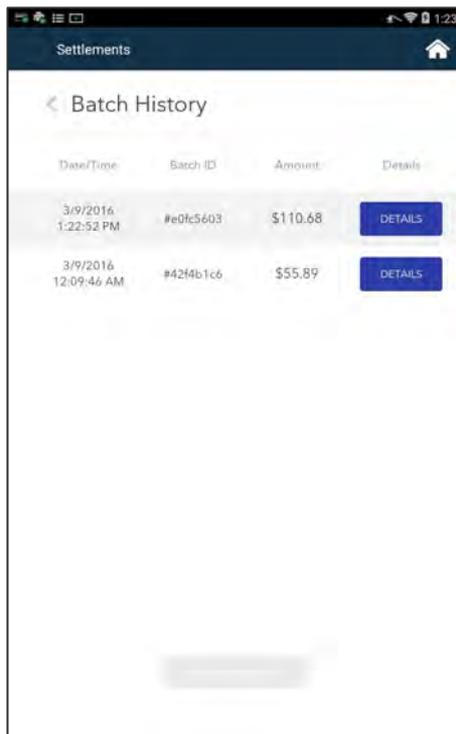
- American Express (6) \$42.00
- Visa (2) \$43.00
- Mastercard (4) \$28.18

Tips \$7.50

Total Sales \$120.68

Refunds (\$10.00)

DONE



Settlements

## Batch History

Date/Time	Batch ID	Amount	Details
3/9/2016 1:22:52 PM	#e0fc5603	\$110.68	DETAILS
3/9/2016 12:09:46 AM	#42f4b1c6	\$55.89	DETAILS



Settlements

## Settlement Report

Report Summary  
Generated Mar 9, 2016 @ 12:09 am Batch ID: 42f4b1c6

Close \$55.89

Sales (14)

- Base \$91.86
- Tips \$1.35
- Total \$93.21

Refunds (11) -\$37.32

Summary by cards

Visa \$6.03

Sales (3)

- Base \$11.22
- Tips \$0.00
- Total \$11.22

Refunds (5) -\$5.19

Mastercard \$53.78

Sales (6)

- Base \$53.99
- Tips \$0.90
- Total \$54.89

Refunds (1) -\$1.11

American Express \$2.65

Sales (4)



Settlements

## Settlement Report

Sales

Date	ID/Barcode	Payment	Total
03/08/16 4:13 pm	#ac49c09a	Amex 1010	\$2.00
03/08/16 4:14 pm	#236310db	Mastercard 2337 (debit)	\$3.45 Tip incl. \$0.45
03/08/16 4:20 pm	#2fa67230	Mastercard 6275	\$6.90 Tip incl. \$0.90
03/08/16 4:21 pm	#0118721e	Mastercard 2337	\$5.00
03/08/16 4:23 pm	#416f26ef	Mastercard 6275	\$6.00
03/08/16 4:25 pm	#6acd1340	Visa 0002	\$5.00
03/08/16 4:27 pm	#8be09058	Visa 0341	\$6.00
03/08/16 4:27 pm	#6e294379	Amex 5029	\$5.00
03/08/16 4:44 pm	#fc5a66d4	Mastercard 6275	\$7.00
03/08/16 4:49 pm	#fc2ea765	Mastercard 6275	\$20.00
03/08/16 5:23 pm	#c5ed4b12	Visa 1111	\$0.22
03/08/16 7:32 pm	#b3486273	Mastercard 6275	\$9.99
03/08/16 7:34 pm	#70840bd7	Amex 1010	\$7.77
03/08/16 7:34 pm	#70840bd7	Amex 1010	\$8.88

# 04 Poynt HQ for Merchants

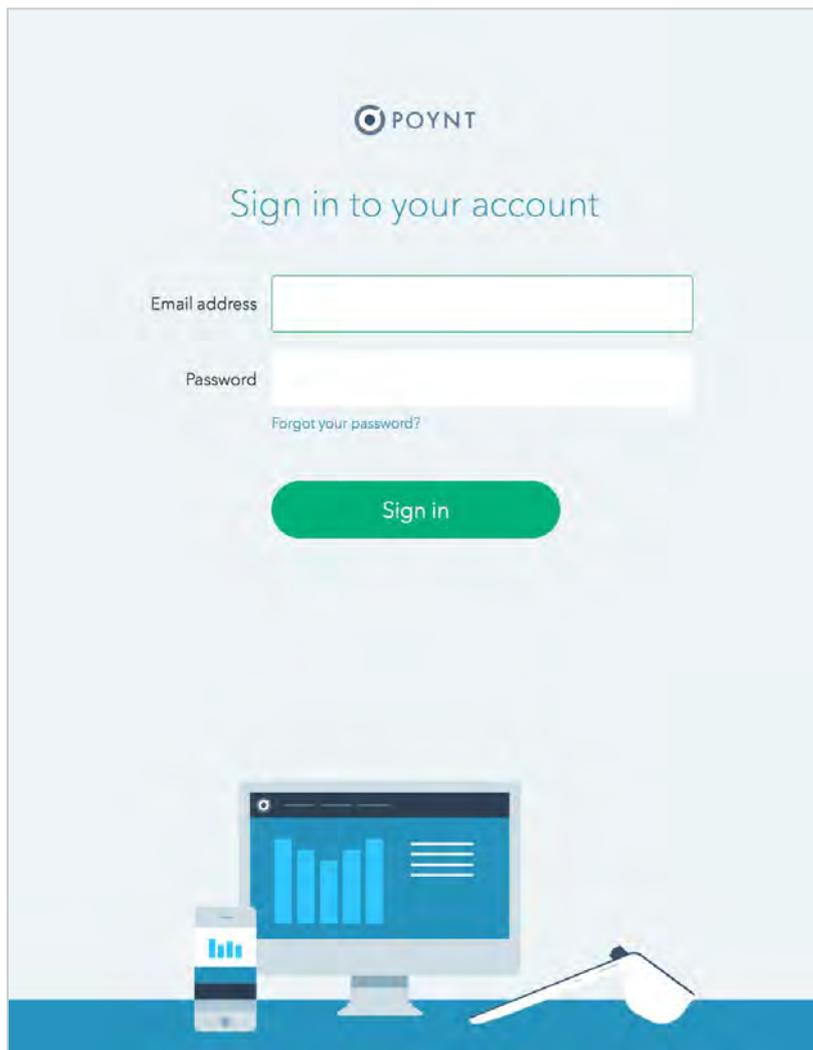
*A portal for managing your business - [poynt.net](https://poynt.net)*

# Poynt HQ: About

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

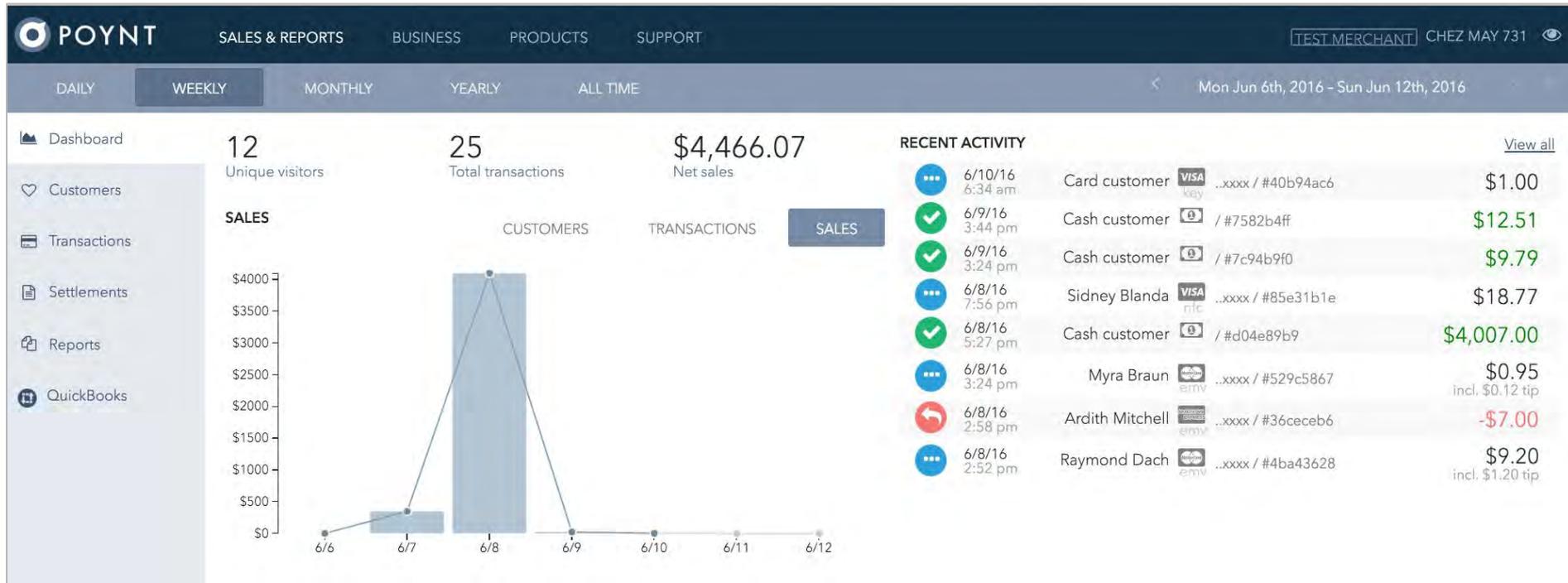
1. View sales and transactions
2. Add additional web or terminal users
3. Generate reports
4. View / set Business Setting
5. Upload custom background images for the Poynt terminal
6. Set up Product Catalog for Register App

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

The screenshot shows the Poynt Transactions dashboard. At the top, there are navigation tabs for SALES & REPORTS, BUSINESS, PRODUCTS, and SUPPORT. The main header displays the merchant name 'TEST MERCHANT' and 'CHEZ MAY 731'. Below the header, there are summary statistics: \$1.00 Today, \$4,466.07 Week, \$4,466.72 Month, and -\$57,519.17 All time. The main content area is titled 'Transactions' and features a search bar. A list of transactions is displayed, each with a status icon, date, time, customer name, and amount. A red box highlights the 'Details' and 'Receipt' buttons for a transaction with a green status icon and an amount of \$18.49.

Date	Time	Customer Name	Amount
6/10/16	6:34 am	Card customer	\$1.00
6/9/16	3:44 pm	Cash customer	\$12.51
6/9/16	3:24 pm	Cash customer	\$9.79
6/8/16	7:56 pm	Kevon Wolf	\$18.77
6/8/16	5:27 pm	Cash customer	\$4,007.00
6/8/16	3:24 pm	Aif Mckenzie	\$0.95
6/8/16	7:58 pm	Waldo Barteli	-\$7.00
6/8/16	2:52 pm	Irving Beatty	\$9.20
6/8/16	1:05 pm	Cash customer	\$66.68
6/7/16	5:39 pm	Card customer	\$18.49
6/7/16	5:37 pm	Card customer	\$20.66
6/7/16	5:35 pm	Card customer	\$9.36

The screenshot shows the 'Transaction Details' view. It is divided into three sections: 'TRANSACTION DETAILS', 'TRANSACTION HISTORY', and 'CARD DETAILS'. The 'TRANSACTION DETAILS' section shows the date and time (5/18/16, 1:08:20 pm), authorization amount (\$6.49), and status (Captured). The 'TRANSACTION HISTORY' section shows a timeline of transactions, including a capture of \$6.49 and an authorization of \$6.49. The 'CARD DETAILS' section shows the cardholder's name (Lora Anderson), card info (\*\*\*\*xxxx visa mfc), and expiration date (9/2020).

The screenshot shows the 'View receipt' view. It features a 'SEND' button and an 'Email receipt to:' field. The receipt details include the merchant name 'CHEZ MAY 731', the date and time (May 20th, 2016 @ 3:40 pm), the merchant address (18384 Business Drive, Suite B81, Palo Alto, California, 94301), and the phone number (1 (534) 5781585 x2380). The receipt also shows a subtotal of \$5.65, a tax of \$0.84, and a total paid of \$6.49. The card type is identified as 'Card customer'.

# 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.

The screenshot displays the Poynt Settlements interface. At the top, there's a navigation bar with 'SALES & REPORTS', 'BUSINESS', 'PRODUCTS', and 'SUPPORT'. The main header shows 'POYNT' and 'TEST MERCHANT POYNT TEST'. The left sidebar contains 'Dashboard', 'Customers', 'Transactions', 'Settlements', and 'Reports'. The main content area is titled 'Settlements' and is divided into several sections:

- SETTLE ALL TERMINALS:** Shows 'Poynt Test' with '6 terminal(s) in store'.
- INDIVIDUAL TERMINALS:** Lists several terminals with their TID, P615WID008G5000098, and time remaining (e.g., 2h, 7h, 1d, 5mo, 10h, 14d).
- REVIEW OPEN BATCH:** A large box showing 'Close (21) \$496.15' and a 'SETTLE OPEN BATCH' button. To the right, a summary shows:
  - Sales (19):** Base \$551.15, Visa \$456.50, Mastercard \$52.50, American Express \$10.05, Discover \$32.10.
  - Tips:** \$0.00
  - Total:** \$551.15
  - Refunds (2):** -\$55.00
- REVIEW TRANSACTIONS:** A table with tabs for 'Open batch (21)', 'Pending tip (0)', and 'Auth only (9)'. The table lists transactions with columns for DATE, ID/NAME, PAYMENT, AMOUNT, TIP, TOTAL, and a VOID button.

DATE	ID/NAME	PAYMENT	AMOUNT	TIP	TOTAL	
11/16/16 2:58 pm	#4f201b55 Bennett Kiehn	XXXX	\$10.05	\$0.00	\$10.05	VOID
11/11/16 9:17 am	#9cd20bfe0 Fern Ziemann	VISA XXXX	\$110.00	\$0.00	\$110.00	VOID
11/11/16 9:16 am	#73Paf4d4 Ethelyn Purdy	VISA XXXX	\$110.00	\$0.00	\$110.00	VOID
11/11/16 9:14 am	#60301407 Leonard Heller	VISA XXXX	\$55.00	\$0.00	\$55.00	VOID
11/11/16 9:13 am	#e9049e97 Romaine Robel	VISA XXXX	\$55.00	\$0.00	\$55.00	VOID
11/11/16 9:00 am	#4bc10751	XXXX	\$15.00	\$0.00	\$15.00	VOID
11/10/16 12:59 pm	#c1d020b9 Greta Schmeler	VISA XXXX	\$5.00	\$0.00	\$5.00	VOID

# Poynt HQ: Transaction Reports

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.

The screenshot shows the Poynt Reports dashboard. On the left is a navigation sidebar with options: Dashboard, Customers, Transactions, Settlements, and Reports. The main area is titled 'Reports' and includes a 'GENERATE A REPORT' section with filters for Type (Transactions report), Store (Poynt Store 1), Device (across all terminals), Employee (for all employees), From (Mon Feb 6, 2017), and To (Mon Feb 6, 2017). A 'GENERATE' button is at the bottom of this section. Below the filters is a 'FILTER REPORTS' section. The main content area displays a list of reports:

Report Type	Amount	Batch ID	Status	Date	TID	Employee	Actions
Settlement	\$1.00	Batch CC-20170203	SUCCESS	Fri Feb 3rd, 2017	TID: 001		VIEW, PDF, Excel
Settlement	\$9.69	Batch CC-20170130	SUCCESS	Mon Jan 30th, 2017	TID: 001		VIEW, PDF, Excel
Transactions				Mon Jan 30th, 2017	TID: 006	Jan Employee	VIEW, PDF, Excel
Transactions	\$31.70			Mon Jan 9th - Mon Jan 30th, 2017	TID: 006		VIEW, PDF, Excel
Settlement	\$10.99	Batch CC-20170125	SUCCESS	Wed Jan 25th, 2017	TID: 006		VIEW, PDF, Excel
Transactions				Sun Jan 1st - Thu Jan 5th, 2017	TID: 006	Lawrence Luk	VIEW, PDF, Excel

The screenshot shows a detailed report for 'Poynt Test Transactions on TID 1234'. The report period is Jan 30, 2017, generated on Jan 30, 2017, at 2:38 pm. The total number of items is 20.

**Summary**

Net Total	\$459.53
Purchases (19)	\$610.63
Refunds (1)	-\$50.10
Pending (0)	\$0.00

**Breakdown**

Net Total	\$459.53
Total Purchases (19)	\$610.63
Cash Purchases (1)	\$14.43
Card Purchases (18)	\$596.20

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E
1	Net Total	\$610.63			
2	Purchases (19)	\$610.63			
3	Tips	\$3.19			
4	→ Tips for Manag	\$3.18			
5	→ Tips for Joe Smi	\$0.01			
6	Avg Purchase	\$32.14			
7	Refunds (1)	-\$50.10			
8	Pending (0)	\$0.00			

# Poynt HQ: Terminal User Transaction Reports

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** SALES & REPORTS BUSINESS PRODUCTS SUPPORT TEST MERCHANT POYNT STORE 1

**Dashboard**  
Customers  
Transactions  
Settlements  
Reports

**Reports**

**GENERATE A REPORT**

TYPE: Transactions report

STORE: Poynt Store 1

DEVICE: across all terminals

EMPLOYEE: for Jan Employee

FROM: Tue Jan 24, 2017

TO: Mon Feb 6, 2017

**GENERATE**

**Transactions**  
Poynt Store 1  
Poynt Store 2  
\$2.00  
Wed Feb 1st - Mon Feb 6th, 2017  
All terminals  
VIEW PDF Excel

**Transactions**  
Poynt Store 1  
Created 2/6/17 @ 6:57 pm  
Tue Jan 24th - Mon Feb 6th, 2017  
All terminals  
Jan Employee  
VIEW PDF Excel

**Settlement**  
Poynt Store 2  
\$1.00  
Batch CC-20170203  
Created 2/3/17 @ 5:01 pm  
SUCCESS  
Fri Feb 3rd, 2017  
TID: 001  
VIEW PDF Excel

**Settlement**  
Poynt Store 2  
\$9.69  
Batch CC-20170130  
Created 1/30/17 @ 5:01 pm  
SUCCESS  
Mon Jan 30th, 2017  
TID: 001  
VIEW PDF Excel

**Transactions**  
Poynt Store 2  
Created 1/30/17 @ 5:27 pm  
Mon Jan 30th, 2017  
TID: 006  
Jan Employee  
VIEW PDF Excel

2 stores: Poynt Store 1, Poynt Store 2  
Transactions across all terminals

Report Period: Feb 1, 2017 - Feb 6, 2017  
Generated: Feb 6, 2017 @ 6:40 pm  
Total # Trans: 2

Summary	
Net Total	\$2.00
Purchases (2)	\$2.00
Avg Purchase	\$1.00
Refunds (0)	\$0.00
Pending (2)	\$4.24

Breakdown	
Net Total	\$2.00
Total Purchases (2)	\$2.00
Cash Purchases (0)	\$0.00
Card Purchases (2)	\$2.00
Check Purchases (0)	\$0.00
External and Web (0)	\$0.00
Total Refunds (0)	\$0.00
Cash Refunds (0)	\$0.00
Card Refunds (0)	\$0.00
Open Auths (2)	\$4.24

# 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** SALES & REPORTS BUSINESS PRODUCTS SUPPORT TEST MERCHANT POYNT STORE 1

**Reports**

**GENERATE A REPORT**

TYPE: Transactions report

STORE: Poynt Store 1

DEVICE: across all terminals

EMPLOYEE: for all employees

FROM: Tue Jan 24, 2017

TO: Mon Feb 6, 2017

**Settlement** \$1.00 Fri Feb 3rd, 2017  
Poynt Store 2 Batch CC-20170203  
Created 2/3/17 @ 5:01 pm SUCCESS TID: 001

**Settlement** \$9.69 Mon Jan 30th, 2017  
Poynt Store 2 Batch CC-20170130  
Created 1/30/17 @ 5:01 pm SUCCESS TID: 001

**Settlement** \$10.99 Wed Jan 25th, 2017  
Poynt Store 2 Batch CC-20170125  
Created 1/25/17 @ 5:01 pm SUCCESS TID: 006

**Settlement** \$0.02 Tue Dec 20th, 2016  
Poynt Store 2 Batch CC-20161220  
Created 12/20/16 @ 5:01 pm SUCCESS TID: 006

**Settlement** \$0.03 Mon Dec 19th, 2016  
Poynt Store 2 Batch CC-20161219  
Created 12/19/16 @ 5:01 pm SUCCESS TID: 006

**Poynt Store 2 Settlement on TID 001**  
Batch date: Jan 30, 2017

**Report Summary**  
Generated: Jan 30, 2017 @ 5:01 pm Batch ID: CC-20170130

**FILTER**

Close	
Sales (5)	
Base	\$9.94
Tips	\$0.00
Total	\$9.94
Refunds (1)	
	-\$0.25

**Summary by cards**

Card Type	Total
Visa	\$7.94
Sales (4)	
Base	\$7.94
Tips	\$0.00
Total	\$7.94
Refunds (1)	
	-\$0.25
Debit	\$2.00
Sales (1)	
Base	\$2.00
Tips	\$0.00

# 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.

**POYNT** SALES & REPORTS BUSINESS PRODUCTS SUPPORT [TEST MERCHANT] POYNT STORE 1

Dashboard Customers Transactions Settlements Reports

### Reports

**GENERATE A REPORT**

TYPE: Items Report

STORE: Poynt Store 1

DEVICE: across all terminals

EMPLOYEE: for all employees

FROM: Tue Jan 24, 2017

TO: Mon Feb 6, 2017

**GENERATE**

**FILTER REPORTS**

TYPE: toggle all

Settlement

**Items**  
Poynt Store 1  
Created 2/6/17 @ 7:06 pm

Tue Jan 24th - Mon Feb 6th, 2017  
All terminals  
Chezmay  
Chezmay

**VIEW** PDF Excel

**Items**  
Poynt Store 2  
Created 11/21/16 @ 4:05 pm

Mon Nov 21st, 2016  
All terminals

**VIEW** PDF Excel

LOAD MORE

**Poynt Store 1**  
Item Sales across all terminals by employee: Chezmay Chezmay

Report Period: Jan 24, 2017 -- Feb 6, 2017  
Generated: Feb 6, 2017 @ 7:06 pm

**Top item in completed orders: Fries**  
Most frequently purchased with:

Item Name	Number of orders
Breadsticks	13
Margarita	12
Martini	10
Custom abc	1
Macchiato	1

**Items in completed orders (Total sales: \$4.00)**

Name	Orders	Quantity	Total sales
Fries	2	2	\$4.00
> Fries (Type: Waffle, Size: Half, Toppings: Garlic)	2	2	\$4.00

**Completed orders**

Date	Order	Items	Items tax	Items notes	Subtotal	Discount	Surcharge	Tax	Tax br
02/06/17	ID #14f82968	Fries (Type: Waffle   Size: Half   Toppings: Garlic) x1	\$0.12		\$2.00	\$0.00	\$0.00	\$0.12	Sales (Sample f
	2:50 pm	Order number 2							
02/06/17	ID #14d9ae1b	Fries (Type: Waffle   Size: Half   Toppings: Garlic) x1	\$0.12		\$2.00	\$0.00	\$0.00	\$0.12	Sales (Sample f
	2:48 pm	Order number 1							

# Poynt HQ: Business Settings

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.

The screenshot shows the Poynt Business Settings interface. At the top, the 'BUSINESS' tab is highlighted in red. The main content area is titled 'May Test Store' and displays business contact information, including the address (490 California Ave, Ste 200, Palo Alto, CA 94306), owner contact (May Slater), phone number ((855) 398-0746), and email (may@poynt.com). A red '1' points to the 'MANAGE BUSINESS' button. Below this, there are sections for 'Poynt Test' and 'May's Device'. The 'Poynt Test' section shows the address (111 Main St, Suite A, Palo Alto, CA 94306), phone number ((650) 555-1212), and bank information (Chase Paymentech, MID: 1234323). A red '2' points to the 'MANAGE STORE' button. The 'May's Device' section shows the device name, TID (1234), and Serial (P61SWT363FS000955), with a red '3' pointing to the 'MANAGE TERMINAL' button. A red arrow points from the text 'Manage unique settings for multiple stores' to the 'MANAGE STORE' button. The interface also features a sidebar with navigation options like 'Terminal users', 'Web users', 'Social accounts', and 'Poynt Loyalty'. At the bottom, there are status indicators for 'Tips enabled' and 'Auto settlement @ 11 pm'.

# 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

### Manage business: POYNT Shop

<b>Description</b>	<input type="text" value="Just another test merchant"/>	<b>Owner contact*</b>	<input type="text" value="Owner"/>	<input type="text" value="Name"/>
	<small>25/512</small>	<b>Phone*</b>	<input type="text" value="650"/>	<input type="text" value="1234567"/>
<b>Address*</b>	<input type="text" value="16226 Business Drive"/>	<b>Email address*</b>	<input type="text" value="test@poynt.com"/>	
	<input type="text" value="Suite 79"/>	<b>Reports emailed to</b>	<input type="text" value="test@poynt.com"/>	
	<input type="text" value="Palo Alto"/>	<small>Send settlement and transactions reports to this email.</small>		
	<input type="text" value="California"/>	<b>Notifications</b>	<input type="checkbox"/> Mobile HQ for transactions	
<b>Website</b>	<input type="text" value="http://undefined.com"/>		<input checked="" type="checkbox"/> Mobile HQ for reports	

# 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

**Manage store: Poynt Test** CANCEL ✕

Basic info | Payment settings | Device screens | Login settings | Txn receipts SAVE STORE →

**Store name \*** Poynt Test

**Phone \*** 650 5551212

**Address \***

111 Main St

Suite A

Palo Alto

CA 94306



# 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.

Manage store: Poynt Test CANCEL ✕

Basic info **Payment settings** Device screens Login settings Txn receipts SAVE STORE >

**Ask for tips**  ON  
Whether customers should be prompted to add a tip after swiping their card.

**Skip sig below \$**   
Don't require a signature when txn is below this amount.

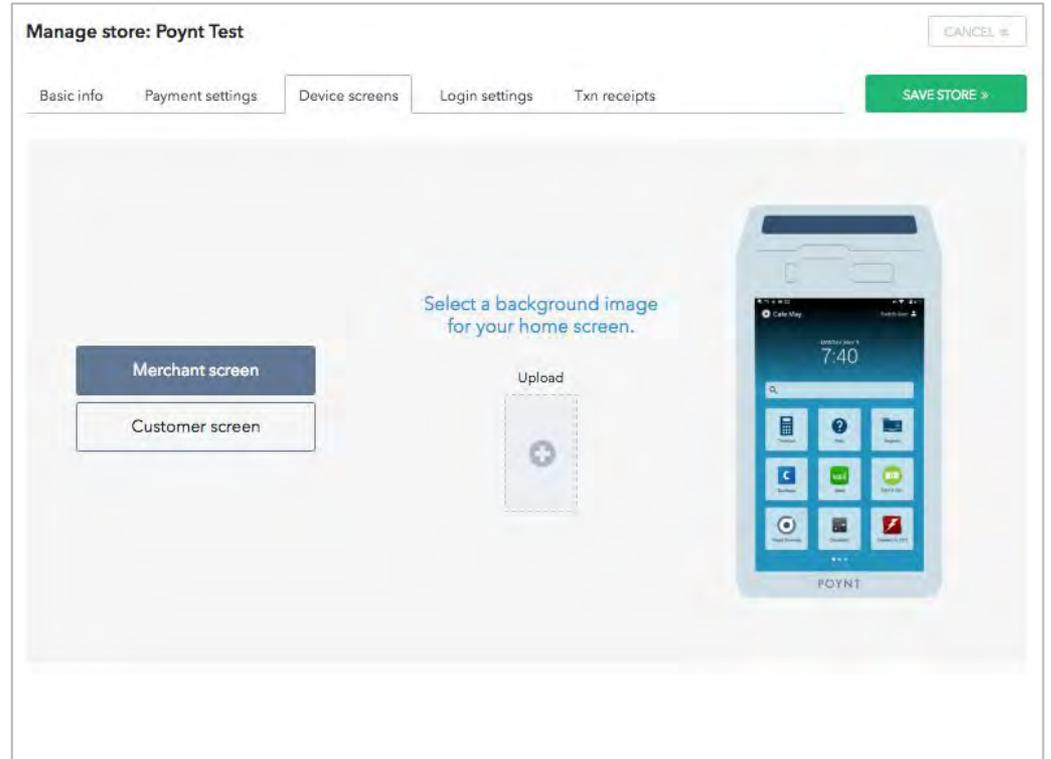
**Auto settlement**  ON  
Automatically settle your open batch at a specified time each day. You will still need to manually add Auth Only transactions to the batch.

**Settlement time**

# Poynt HQ: Set Merchant & Customer Background Screens

Poynt.net > Business > Manage Store > Merchant Screen / Customer Screen

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

The screenshot shows the 'Manage store: Poynt Store 1' interface. At the top, there are navigation tabs: 'Basic info', 'Payment settings', 'Device screens', 'Login settings', and 'Txn receipts'. A green 'SAVE STORE' button is in the top right. The 'Txn receipts' tab is active, showing two preview areas: 'Email receipt' and 'Paper receipt'. The 'Email receipt' preview shows a 'Thank you!' message with business details and a coupon. The 'Paper receipt' preview shows a 'TOTAL \$8.00' and a coupon. On the left, there are input fields for 'Receipt footer', 'Open hours', 'Website link', 'Facebook link', 'Twitter link', and 'Yelp link'. The 'Receipt footer' field contains the text: 'Show your receipt for a free coffee on your next visit. Expires 9/1/16. Thanks for stopping by!'. Below it, a note says 'The following will only appear on the email receipt.' The 'Open hours' field contains 'e.g. Mon-Fri 9am-5pm Sat 11am-5pm Sun Closed'. The 'Website link' is 'http://poynt.com', 'Facebook link' is 'http://facebook.com/poynt', 'Twitter link' is 'http://twitter.com/poynt', and 'Yelp link' is 'e.g. http://www.yelp.com/biz/yelp'.

# 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)

The screenshot displays the Poynt HQ interface for managing terminals. At the top, there are status indicators: '\$ Tips enabled' and 'Auto settlement @ 11pm'. Below this, a list of terminals is shown for the store 'Poynt Test' (111 Main St, Suite A, Palo Alto, CA 94306; (650) 555-1212; Bank: Chase Paymentech MID: 1234323). The terminals listed are:

- May's Device** (TID: 1234, Serial: PA1SWT363ES000955) - This terminal's 'MANAGE TERMINAL' button is highlighted with a red box, and a red arrow points from it to the detailed view below.
- Lobab's Device** (TID: 800, Serial: P61SCD508FS000800)
- 123** (TID: 123, Serial: P61SWD064GS003178)

The detailed view for 'May's Device' shows:

- Terminal name\***: May's Device
- Catalog**: BAR & FOOD (21 PRODUCTS)
- Buttons: CHANGE CATALOG (with a dropdown arrow), REMOVE CATALOG (with a dropdown arrow)
- SAVE TERMINAL \*** (green button)
- CANCEL** (grey button)