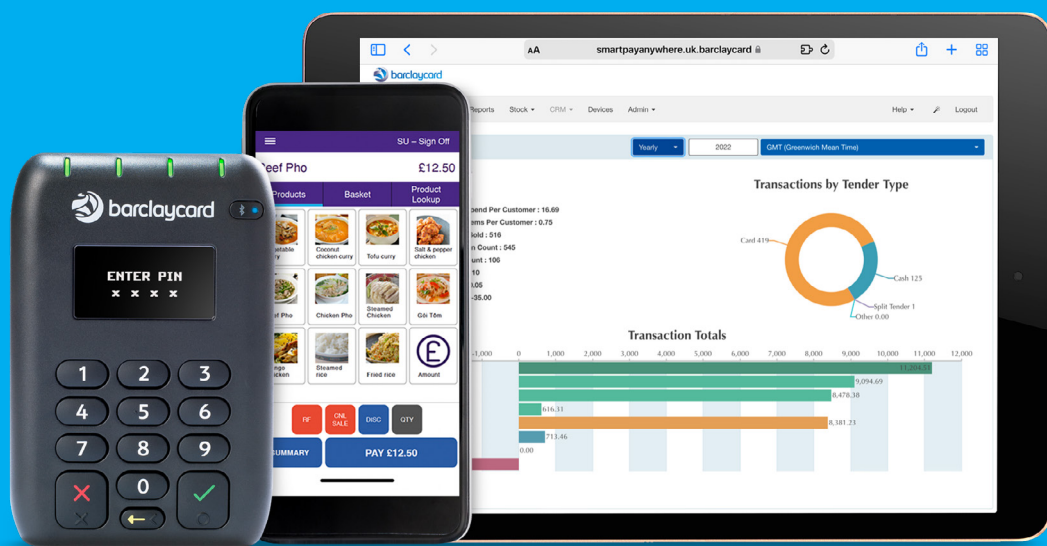


Take cards
Track
sales
Tackle
admin

The pocket-sized card reader to take your business anywhere



Your setup guide

The payment part
is just the start

 **barclaycard** | payments

What do you
want to do?

Show me
my product

Get me
set up

Let's make
a sale

I want to
do more

Help and
support



Welcome to Smartpay Anywhere

First off, thank you for choosing to take card payments with us. With the pocket-sized Smartpay Anywhere, you can take payments almost anywhere with your smartphone or tablet.

Of course, Smartpay Anywhere can do a lot more than take payments, such as track sales and tackle admin. But let's start with helping you set up your device and getting you ready to take your first payment.

Just follow this guide and you'll be taking cards in no time. If you have any problems, our technical support team are here to help on 0800 0920 808 (24/7, except Christmas Day).

Need your enrolment code in a hurry?
Learn where to find it [here](#).

What do you want to do?



Show me my product >



Get me set up >



Let's make a sale >



I want to do more >



Help and support >

What do you want to do?

Show me my product

Get me set up

Let's make a sale

I want to do more

Help and support



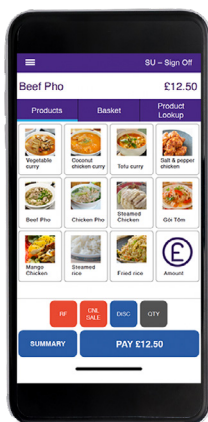
Show me my product

Finding your way around your new device and software

Card reader

Your Smartpay Anywhere device comes with a USB charging cable

[Learn more](#) >



App on your phone or tablet

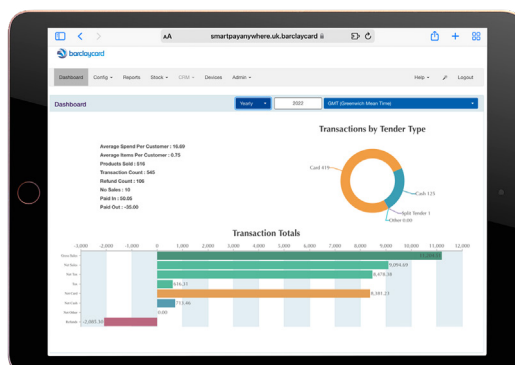
You'll need the app to take payments with the card reader and manage your business

[Learn more](#) >

Online portal

The online portal lets you manage users and access reports as well as change settings to suit your business

[Learn more](#) >



[Let's go](#) >

What do you want to do?

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Show me my product

Finding your way around your card reader



Display for cardholder instructions

'X' key to cancel actions including PIN entry

Arrow key to delete last PIN digit entered



'✓' key confirms actions including PIN entry

Chip-and-PIN slot (insert with chip facing upwards)

Green lights show a contactless card transaction is being processed



Red light shows when unit is charging

Power button to turn on or off, or to enter sleep mode

USB socket for charging

Slot for magnetic stripe cards facing stripe-down and away from the cardholder

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Show me my product

Finding your way around the Smartpay Anywhere app

Use the menu icon '≡'
in the top left corner to find
the features you need.

Register

The home screen

End of Day

Close today, ready for tomorrow

Reports

Keep track of your business

Paid In

Add cash to the float

Paid Out

Track cash removed from the float

Transaction History

View transaction details to issue
refunds or email receipts later on

Products

Manage your inventory/services

Taxes

Set the right rates

Web Portal

Manage settings and more
(best viewed on tablet or desktop)

User Guide

For the most up-to-date help,
please visit the Smartpay Anywhere
[help and support hub](#)



Register



End of Day



Reports



Paid In



Paid Out



Transaction History



Products



Taxes



Staff



Web Portal



User Guide



Getting Started



Support

What do you want to do?

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Help and support



Show me my product

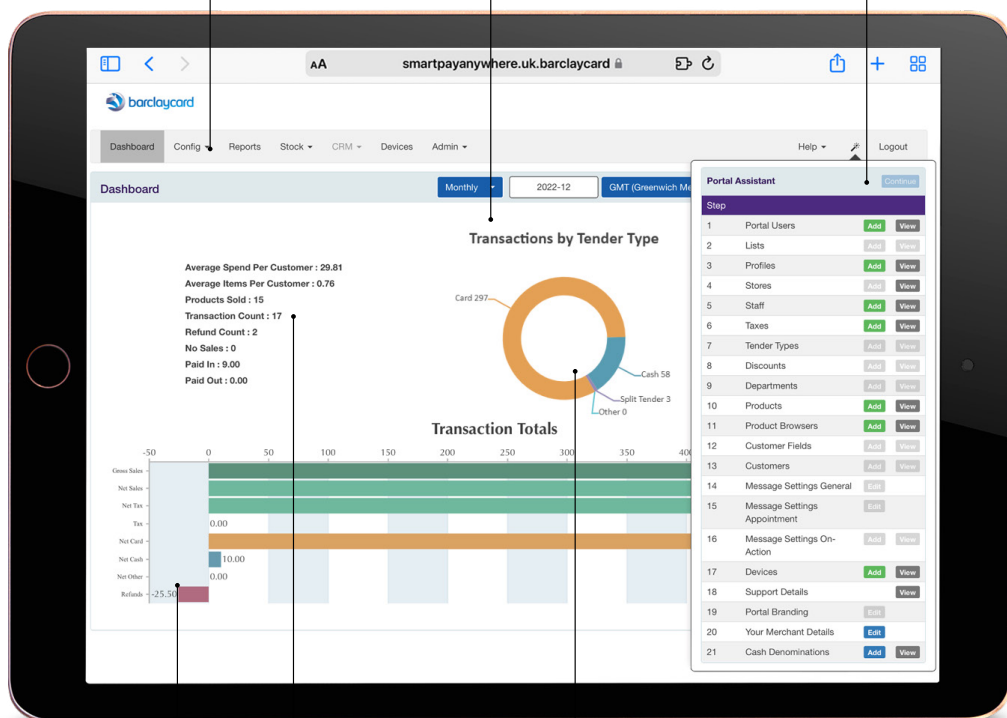
Finding your way around the online portal



Portal Assistant provides a quick way to access key topics for managing your solution, such as adding new products or managing staff/VAT

Menu tabs

Select the store and date range to be shown on the dashboard



Summary of sales data

Illustrative view of sales performance

Summary of transactions by tender type



Smart tip

Add the portal as a bookmark or favourite in your browser.

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Get me set up

Seven steps so you can start taking cards

Step 1

Charge up your card reader for at least three hours

Pop the USB cable into the top of the card reader and connect it to the port on any computer or a USB plug adapter.

Step 2

Download your Smartpay Anywhere app

On your smartphone or tablet, go to Apple Store or Google Play and search for '**Barclaycard Smartpay Anywhere**'. Then download it.



[Go to the next step >](#)



Smart tip

A short press of the blue on/off button at the top of the card reader will put it into standby. A long press will power down the card reader completely.

If you won't be using the card reader for a while, always turn it off completely. Leaving it on standby for too long will drain the battery and may require you to replace your device.

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Seven steps so you can start taking cards

Step 3

Getting started with your account and app

Start by visiting the [online portal](#) and logging in.

How to log in for the first time



In the [online portal](#), go to '**Devices**' to find your unique enrolment code(s).

How to find your enrolment code(s)



Open the Smartpay Anywhere app on your phone or tablet and enter the enrolment code.

How to activate your app



Go to the next step >

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How to log in for the first time

If it's the first time you've been to the [online portal](#), your login details will be:

Username:

The email address you gave with your application

Password:

Your one-time password will combine the following:

- the word '**mid**'
- your 7-digit Barclaycard **Merchant ID** (shown on the welcome letter/email we sent you)
- your business **postcode** (using uppercase)

An **example password** would be: mid1234567NN47SG

Login

Username

Required

Password

Required

Submit

Once you've logged in for the first time you'll be asked to change your password to keep your account secure.



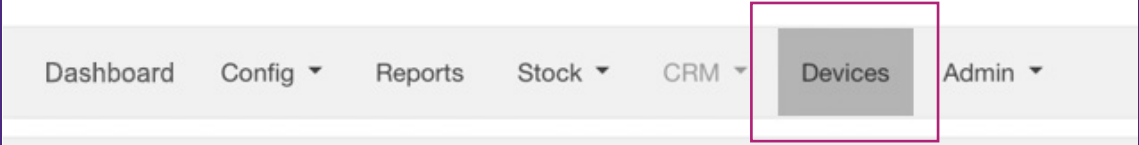
Get me set up

Seven steps so you can start taking cards



How to find your enrolment code

In the online portal, click on **‘Devices’** on the navigation at the top of your screen.



You'll find the code you need to copy in the **‘Enrolment Code’** column.

↓	License Type	↑↓	Enrollment Code	↑↓	Store Name	↑↓	Pro
	Lite		[Your code will appear here]		[Town]		[M]

If you've ordered one card reader and have one user, simply use your code to complete the setup process.

If you've ordered multiple card readers, you'll find more than one enrolment code. You can use these to set up mobile devices for your employees or business partners. To find out more, go to Step 5 (optional) for more details after you have set up your account.

What do you want to do?

Show me my product

Get me set up

Let's make a sale

I want to do more

Help and support



Get me set up

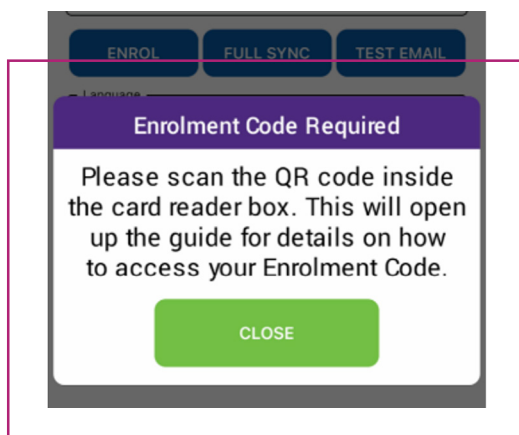
Seven steps so you can start taking cards



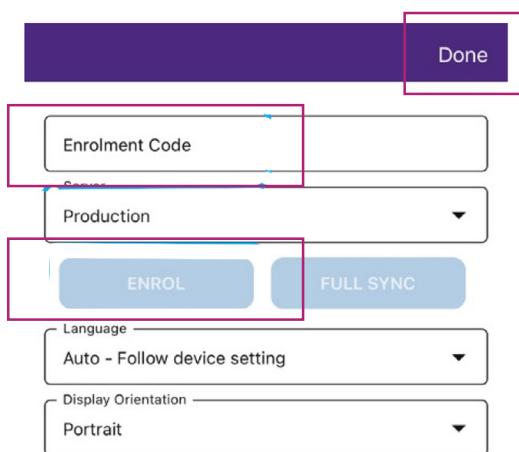
How to activate your app

Once you have the enrolment code, you can now open the Smartpay Anywhere app.

You'll see a message asking for the code – if you've already followed the previous steps, ignore this and press '**Close**'.



Simply add the '**Enrolment Code**' into the settings field and click '**Enrol**', followed by '**Done**'.



What do you want to do?

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Step 4

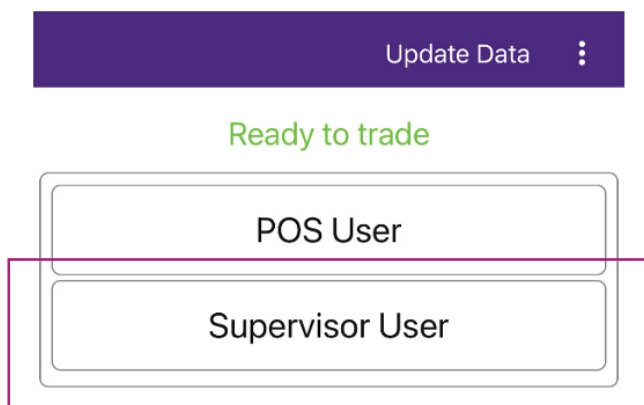
Log in to your app

Make sure you have a WiFi or mobile data signal, then click on the Smartpay Anywhere app to launch your point-of-sale software.

The software has two default staff members already set up – one **'Supervisor User'** and one **'POS User'**. As the business owner, we recommend you set yourself up as the **'Supervisor User'** as you'll have access to all settings and software features.

Your default access PIN is 9876.

For security, you'll need to change this when you first log in.



If you'd like to rename **'Supervisor User'** or **'POS User'**, go to the [online portal](#) and visit **Config > Staff**.

Go to the next step >



Smart tip

If it's just you using the device, you can remove the **'POS User'** option. Go to the online portal and visit **Config > Staff**. Here you can click the '🗑️' delete icon and confirm.

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Step 5 (optional)

Setting up additional users

After you have set yourself up as the '**Supervisor User**', additional users can be added in several ways – you can explore your options below:

Using the default 'POS User' >

Adding staff via the online portal >

Adding staff in the app >

Managing user permissions >

If you are happy to share one mobile device, e.g. a shared iPad in a shop, [go to Step 6](#). However, if you'd like additional users to be able to use separate smartphones or tablets use the link below to find out more:

Using multiple card readers >

Go to the next step >

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Using the default 'POS User'

If you only have one additional staff member or only have staff on an ad hoc basis, you can use the default **'POS User'** to enable them to use your smartphone or tablet (assuming you're happy to be sharing the device). You won't be able to track individual staff in the online reports, but you will be able to use the default user permissions to restrict their access in the app.

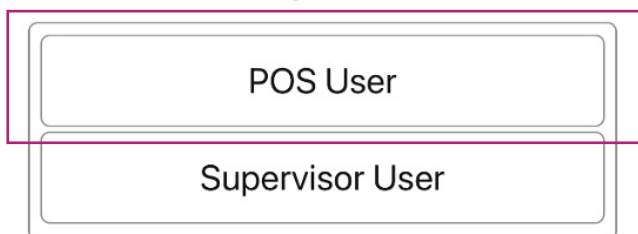
To add them to your device, click **'POS User'**.

Their default access PIN is 1234.

For security, when they first log in they'll be asked to change their PIN.



Ready to trade



If you want to rename the **'POS User'** or **'Supervisor User'** accounts, go to ['Adding staff using the app'](#) for more instructions.



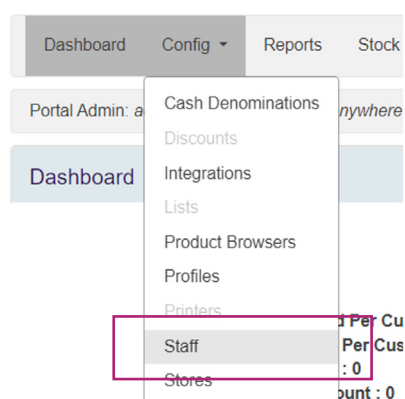
Get me set up

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Adding staff via the online portal

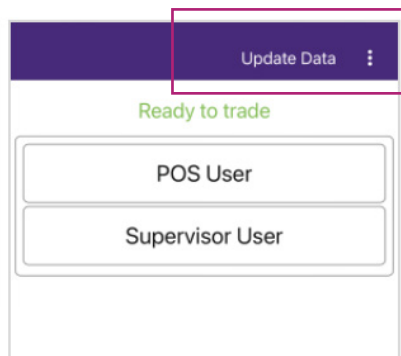
To make it easier to track staff performance or assign different levels of access, each staff member can be set up as a user. To add them, go to the online portal and then **Config > Staff**.



You can either edit the default **'POS User'** using the '✎' edit button and/or add staff members by pressing **'New Staff Member'**. If you need to delete a staff member use the '🗑' delete button. You can choose to assign **'Supervisor User'** or **'POS User'** status to each staff member you add.

Staff					New Staff Member
	First Name ↑↓	Last Name ↑↓	Staff Code ↑↓	Role ↑↓	
✎ 🗑	POS	User	0002	POS User	
✎ 🗑	Supervisor	User	0001	POS Supervisor	

If the staff members you set up aren't visible on the app's login screen, just press **'Update Data'** in the top right-hand corner and the staff list will be updated.



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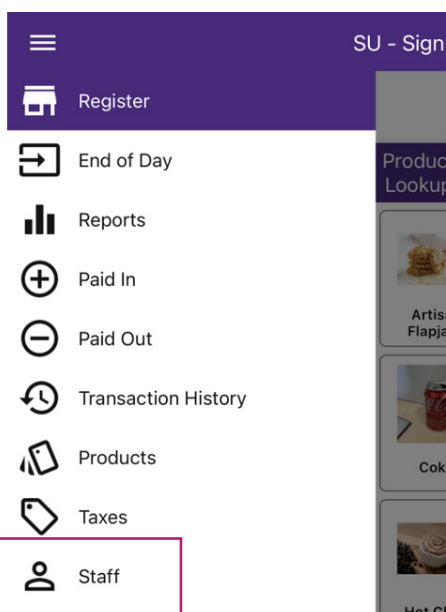
Get me set up

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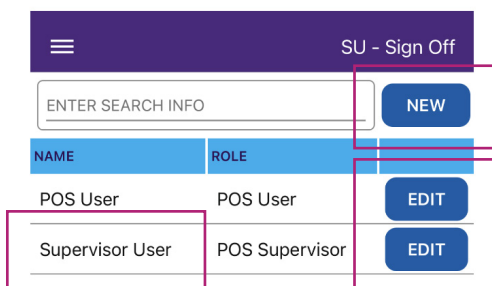
Adding staff in the app

To make it easier to track staff performance or assign different levels of access, each staff member can be set up as a user. You can do this directly in the app with a '**Supervisor User**' account.



Using the '≡' side menu button, click on '**Staff**'. By default only a '**Supervisor User**' can add or edit staff members.

To add a new member of staff, select the '**New**' button. You can edit an existing profile by clicking the '**Edit**' button.



Read more about adding or editing staff accounts





Get me set up

Seven steps so you can start taking cards



Adding staff in the app (cont.)

To add a new member of staff, complete their details. You can also edit staff details in the same way. To save changes press '**Save**'.

Staff Member Details

*Required

Add staff member first name (required)

*Required

Add staff member last name (required)



Add staff member date of birth (optional)

Create a staff code (optional)

*Required

Create a PIN for the staff member to log in (required)

*Required

Confirm PIN for the staff member to log in (required)

Role*



Select role - POS User or Supervisor (required)

Create / Edit Products



Select if the staff member is able to edit products including pricing

CANCEL

SAVE

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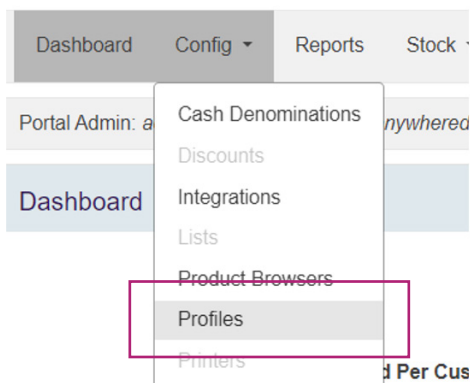
Managing user permissions

There are two role options for users of the app:

- **'Supervisor User'** is typically assigned to managerial level staff and gives access to all the features available
- **'POS User'** is for employees and is designed to limit access to some features, so for example only supervisors can perform or approve refunds.

To amend permissions
visit the online portal.

1. Select **Config > Profile**
2. Choose the profile
you want to edit
3. Tap on the  pencil icon
4. Select **'User Permissions'**



Profile

Name

Default

General

Functions

User Permissions

Confirmations

Read more about managing
user permissions



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Managing user permissions (cont.)

For each feature or function, you can choose the following options:

- **'All POS Users'** – everyone can access it
- **'Supervisor approval'** – supervisor must enter their PIN on that device to approve
- **'Supervisor only'** – only a logged-in supervisor can do this
- **'Disabled'** – no one can do this

Defaults enabled for all
'POS Users'



Defaults enabled for
'Supervisor Approval Only'



Defaults enabled for
'Supervisor Only'



You can change these permissions to suit the needs of your business.



Get me set up

Seven steps so you can start taking cards



Managing user permissions (cont.)

Defaults enabled for all 'POS Users'

Manual percentage discount	Reduce a basket item or the whole basket by X per cent e.g. 10% off
Manual price discount	Reduce a basket item or the whole basket by a set amount e.g. £5 off
Cancel sale	Stop a sale midway, e.g. if a customer changes their mind or staff want to start again
Price override	Change the price of an individual item in the basket
Void item	Void an item in the basket
Transaction history	View the transaction history to resend email receipts or perform refunds
Perform start day	Start the trading day in the app
Perform end day	Close the trading day in the app and perform cashing up
Training mode	Access a safe mode where all actions are not recorded as actual sales

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Managing user permissions (cont.)

Defaults enabled for 'Supervisor Approval Only'

Refund

Refund a previous sale whether
paid by cash or card

Defaults enabled for 'Supervisor Only'

Paid in

Adjust the cash float to pay
in money

Paid out

Adjust the cash float to withdraw
money (petty cash)

Reports

Access daily sales summary
for their own sales and the
wider business

Products

Add/amend product inventory

Taxes

Add/amend tax rates

Staff

Add/amend staff members

Web portal

Access the Smartpay Anywhere
online portal from their mobile
device

[What do you want to do?](#)[Show me my product](#)[Get me set up](#)[Let's make a sale](#)[I want to do more](#)[Help and support](#)

Get me set up

Seven steps so you can start taking cards



Using multiple POS units

You'll need a separate enrolment code for each smartphone or tablet you want to use with each card reader. You'll receive one enrolment code per card reader.

Remember to set up the staff and their permissions first by creating a new user; just go to [Step 5](#) to find out how to add or manage users.

Need to order more card readers?

If you need to order more card readers, just give our team a call on 0800 092 9305 (Mon-Fri, 9am-5pm). Once ordered, the enrolment codes should then appear in the online portal.

Already have your extra card readers?

If you've already ordered additional card readers, you should be able to see all your enrolment codes in the '**Devices**' tab of the online portal. [For more details, go to 'How to find your enrolment code'](#).

Once the enrolment codes have been added to the '**Devices**' tab in the online portal, ask your staff members to follow [Step 2](#) and [Step 3](#).

Shared card readers

It's possible to share a card reader between different smartphones or tablets running the app. However, the card reader will need to be 'unpaired' and 'paired' via Bluetooth each time it is swapped between each mobile device.

For most businesses, we recommend that each smartphone or tablet uses its own card reader for convenience.

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Get me set up

Seven steps so you can start taking cards

Step 6 (optional)

Add your products to the app

By default, every user has one product option called **'Amount'**. This is useful if you just want to key in an amount each time.

If you want to be able to select products easily within the app when you're making a sale, you can add new product details and images via the products menu in the app or in the online portal.

First, press the '≡' menu button in the top left-hand corner. Select **'Products'** from the list and tap **'New'**.

[Show me what this looks like](#)

Then simply fill out the boxes, including all mandatory fields such as **'Name'**, **'Product Type'** and **'Tax and Price'**. When done, press **'Save'** and the product will be added to the **'Product Browser'**.

[Show me what this looks like](#)[Go to the next step >](#)

What do you want to do?

Show me my product

Get me set up

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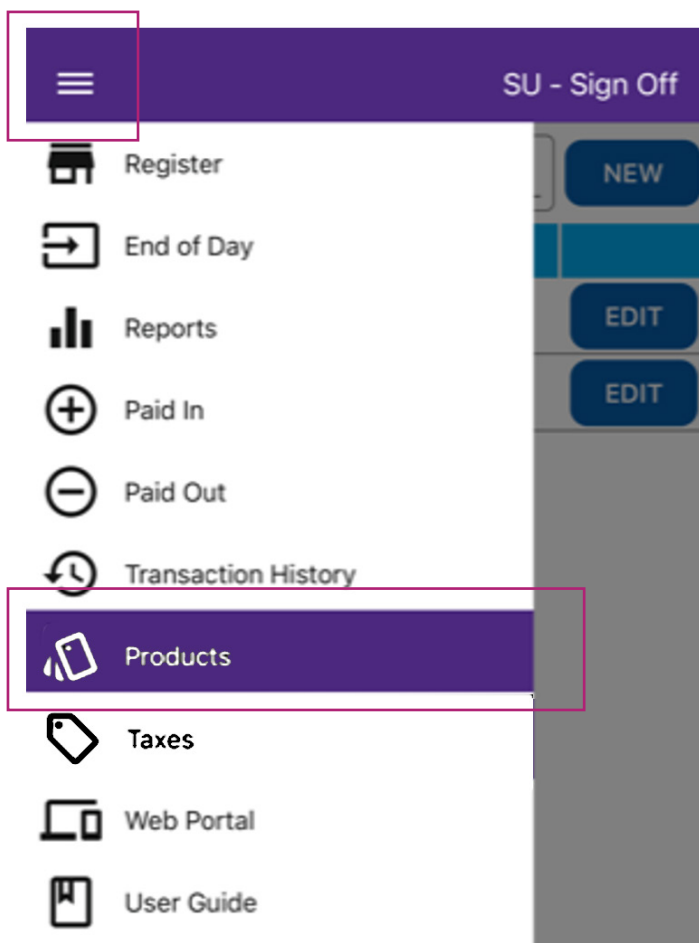


Get me set up

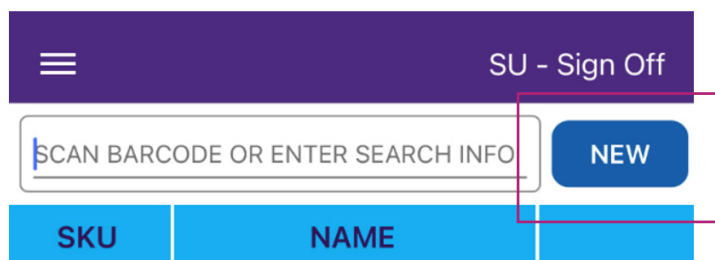
Seven steps so you can start taking cards



Press the '≡' menu button in the top left-hand corner.



Select '**Products**' from the list and press '**New**'.





Get me set up

Seven steps so you can start taking cards



Fill out the boxes, including all mandatory fields such as **'Name'**, **'Product Type'** and **'Tax and Price'**. When done, press **'Save'** and the product will be added to the **'Product Browser'**.

Product Details

Name*

Enter product name

*Required

SKU

(Optional)
Enter a Stock Keeping Unit (SKU) reference or leave blank for auto-allocation

Barcode

(Optional)
Add the barcode from the product to be able to scan items using the device camera

Product Type*

Regular

Select either:
'Manual' – enter the price each time;
or **'Regular'** – fixed price

Selling Price - Standard

Tax*

Select tax rate from your list: zero tax is added by default. Add more if required

Sell Price Ex Tax*

Sell Price Inc Tax*

Add price; choose either including or excluding tax



Add Image

(Optional)
Add an image from either your camera or the gallery

CANCEL

SAVE

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Get me set up

Seven steps so you can start taking cards

Step 7

How to pair your new card reader

Turn on your smartphone or tablet's Bluetooth setting so you are ready to connect with your new card reader.

Use the blue power button to switch on the card reader.

Once you see the blue light next to the Bluetooth symbol, hold down the green '✓' key until the blue light blinks rapidly.



Make the connection on your smartphone or tablet

Go to **Settings > Bluetooth > Devices** (you might need to search for a new connection).

Your device name will be '**Barclaycard**' followed by a six-digit number. Tap on it, then check that the same six digits also appear on your card reader's screen. You can then tap the '**Pair**' button on your phone or tablet.

Press the green '✓' key on the card reader to confirm the pairing. Your phone or tablet should then say '**Connected**' next to '**Barclaycard**' on your '**Devices**' list.

[Go to 'Let's make a sale' >](#)

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Let's make a sale

Get trading straight away

Step 1

Start the trading day in the app

The Smartpay Anywhere app uses the concept of a trading day to help you keep track of your sales.

To start your trading day:

- ① Open the app and select '**Start Day**'
You'll be prompted for your float – the amount of cash you've got to give change to customers, etc.
- ② If you have a cash float, enter the total amount and press '**Start Day**'
- ③ If there is no cash float, just press '**Start Day**' and then confirm by selecting '**Yes**'

Show me what this looks like



Go to the next step >



Smart tip

The trading day default setting follows a standard day (midnight to midnight). You can change your trading day hours on the online portal – to find out more [visit the Help and Support pages](#).

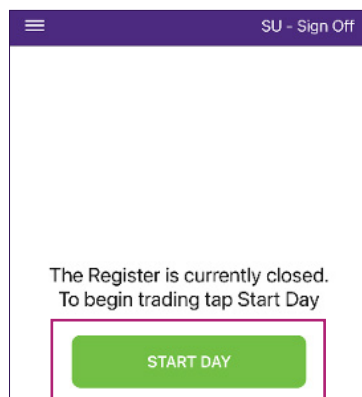


Let's make a sale

Get trading straight away

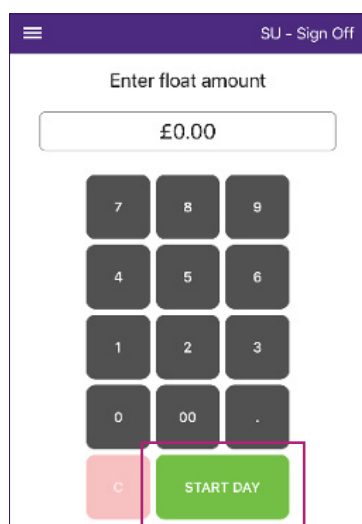


- 1 Open the app and select '**Start Day**'

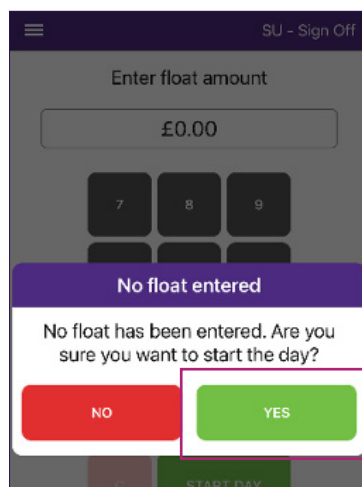


- 2 You'll be prompted for your float – the amount of cash you've got to give change to customers, etc.

If you have a cash float, enter the total amount and press '**Start Day**'



- 3 If there is no cash float, just press '**Start Day**' and then confirm by selecting '**Yes**'





Let's make a sale

Get trading straight away

Step 2

Add products to the basket

If you've already added products to the app, simply make a selection and follow the on-screen instructions.

Otherwise, you'll need to select '**Amount**' and enter the total cost to the customer.

When you get to the basket view, you have the option to rename '**Amount**' to a unique reference, e.g. **a customer account number**.

- ① Select '**Amount**' and record the price.
Then tap '**Enter**'

Show me what this looks like



- ② **Optional:** Before pressing '**Pay**', select '**Rename**' on the basket screen – type in your chosen reference and press '**Save**'

Show me what this looks like



- ③ Click '**Pay**' and select the customer's payment type – go to [Step 3](#) to find out more

Show me what this looks like



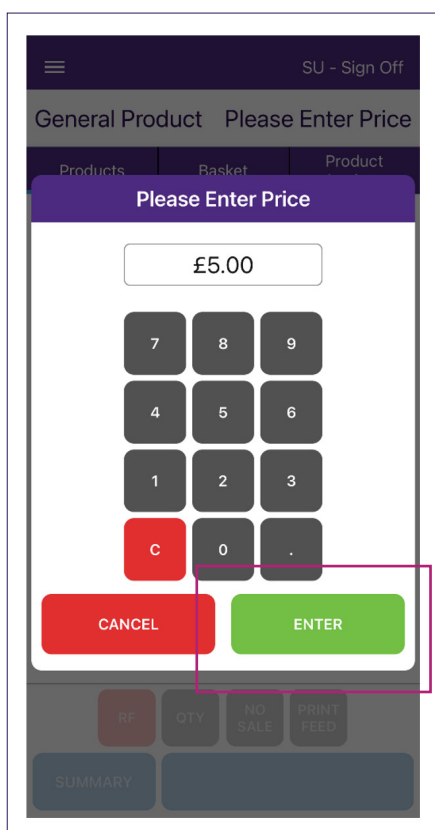
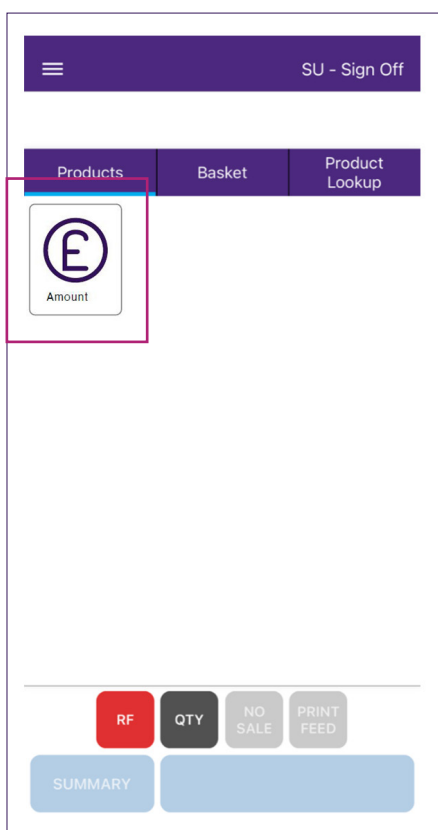


Let's make a sale

Get trading straight away



- 1 Select '**Amount**' and record the price. Then tap '**Enter**'



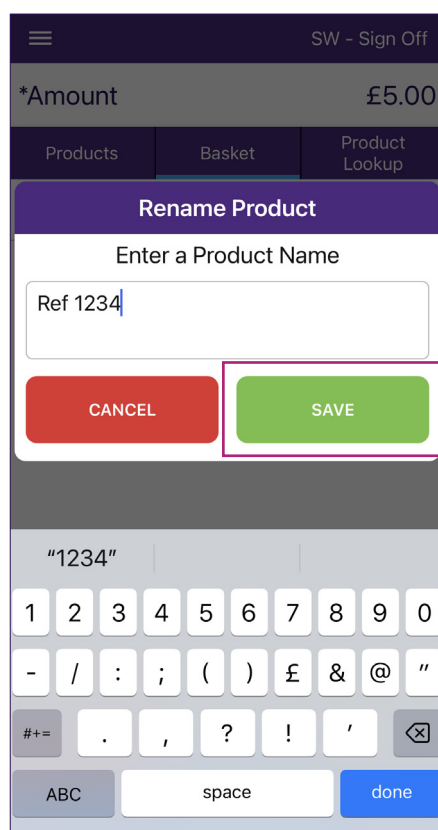
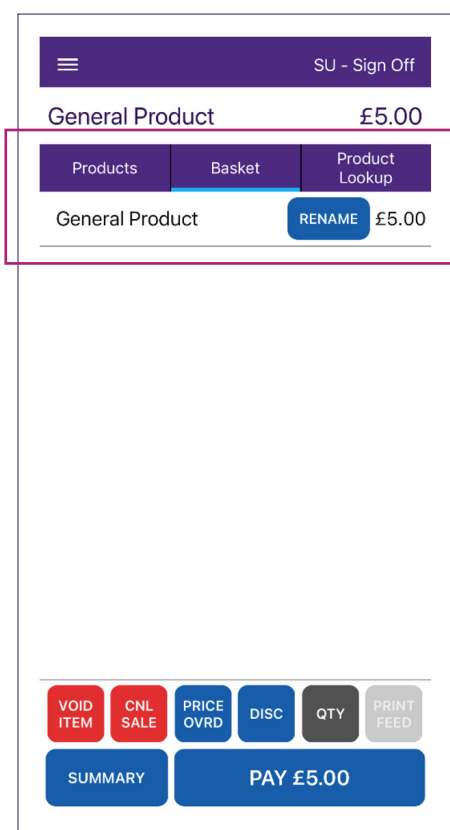


Let's make a sale

Get trading straight away



- ② **Optional:** Before pressing '**Pay**', select '**Rename**' on the basket screen – type in your chosen reference and press '**Save**'



Smart tip

Adding a unique reference will help you track your sales when it comes to looking at your sales reports.



Let's make a sale

Get trading straight away



- ③ Click '**Pay**' and select the customer's payment type – go to [Step 3](#) to find out more

☰SW - Sign Off

Ref 1234£5.00

Products

Basket

Product Lookup

Ref 1234

RENAME

£5.00

VOID ITEM

CNL SALE

PRICE OVRD

DISC

QTY

PRINT FEED

SUMMARY

PAY £5.00

<Tender Transaction

Ex Tax: £5.00
TAX: £0.00

Total(1)
£5.00

ADD TIP

VIEW SUMMARY

To Pay

£5.00

ADJUST

CASH / AMOUNT TENDERED

CARD

£5

£10

£20

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Let's make a sale

Get trading straight away

Step 3

Taking payment

Choose the tender type.

CARD

By card

When ready, tap the '**Card**' button and follow the on-screen instructions.

CASH / AMOUNT
TENDERED

With exact cash

If the customer is paying with the exact amount of cash, simply tap the '**Cash/amount tendered**' button.

£5

With a banknote

To save you time when taking a banknote, you can use the quick-tender buttons for the full amount, e.g. '**£5**', '**£10**' or '**£20**'. These can be configured in the portal if required.

£10

£20

ADJUST

Other cash amount

If customers give you more cash than the total sale amount (and it's not covered by a quick-tender button), press '**Adjust**' and enter the total given in the box titled '**To Pay**', press '**Enter**' and then select '**Cash/amount tendered**'.

Go to the next step >

[What do you want to do?](#)[Show me my product](#)[Get me set up](#)[Let's make a sale](#)[I want to do more](#)[Help and support](#)

Let's make a sale

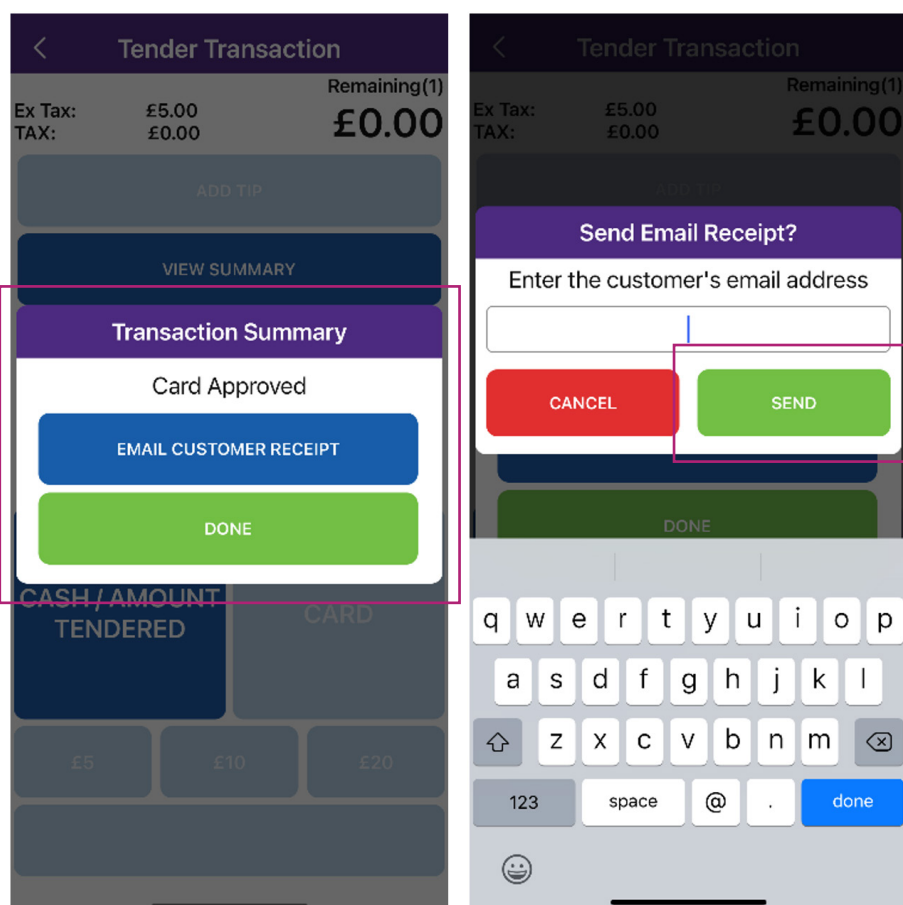
Get trading straight away

Step 4a

Email your customer a receipt

Once the transaction goes through, you'll see a **'Transaction Summary'** screen. Here you can choose to email your customer a receipt or simply click **'Done'** to finish without sending one.

When you choose **'Email customer receipt'** the next screen will prompt you for the customer's email address – we recommend double-checking the email before clicking **'Send'**.



[How to email a receipt later](#)



[Go to the next step](#) >

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Let's make a sale

Get trading straight away



Send a receipt by email later

You can still email a receipt to a customer after a transaction has already been completed.

- ① Select '**Transaction History**' from the side menu.
- ② Search for the customer's transaction either using the date or the transaction reference.

Show me what this looks like



- ③ Once you have found the correct transaction, tap '**View**' to see all the details.
- ④ Search for the customer's transaction either using the date or the transaction reference.

Show me what this looks like



What do you want to do?

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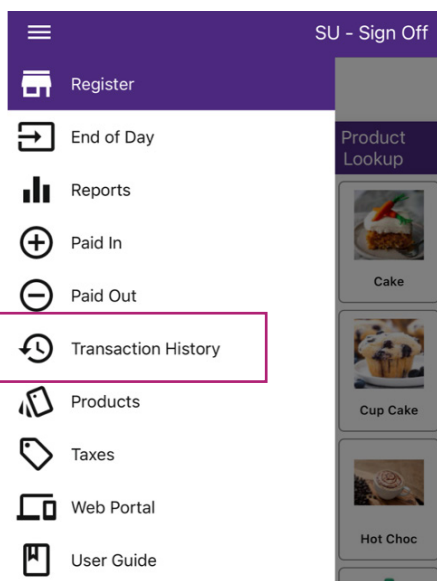


Let's make a sale

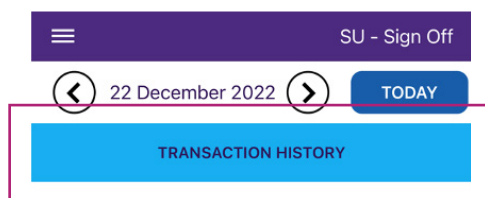
Get trading straight away



- 1 Select '**Transaction History**' from the side menu.



- 2 Search for the customer's transaction using either the date or the transaction reference.



OR








Let's make a sale

Get trading straight away



- ③ Once you have found the correct transaction, tap **'View'** to see all the details.

 SU - Sign Off


 25 November 2022  TODAY

TRANSACTION HISTORY

2211251547345780017177
15:47 Supervisor User
CARD (1) £3.00

VIEW

- ④ Select **'Email Receipt'** at the bottom and follow the instructions ([see Step 4a for more details](#)).

 2211251547345780017177

Transaction Details

Americano	£3.00
Ex Tax:	£3.00
TAX:	£0.00
Total:	(1) £3.00
Assigned:	Supervisor User

EMAIL RECEIPT

TIP ADJUSTMENT

REFUND

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Let's make a sale

Get trading straight away

Step 5 (optional)

When you're done for the day, end your trading day

- ① Using the side menu on the app, select '**End Day**'. Click '**End Day**' again when prompted
- ② View '**Expected Takings**' and then enter the figures in the '**Actual Values**' tab

Show me what this looks like



- ③ Enter the total amount of cash taken. If you did not accept any cash, just press '**Save & Close**'

Show me what this looks like



- ④ Your total takings will be shown. If you see a shortfall or surplus, check the amounts again (this is for your records; it won't affect the amount paid into your account from card sales)
- ⑤ Finally, select '**End Day**'

Show me what this looks like



Go to 'I want to do more' >

What do you want to do?

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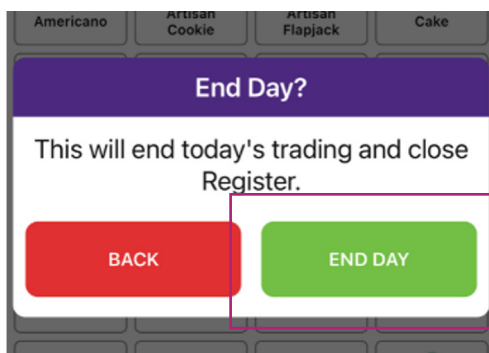


Let's make a sale

Get trading straight away



- 1 Using the side menu on the app, select '**End Day**'. Click '**End Day**' again when prompted



- 2 View '**Expected Takings**' and then enter the figures in the '**Actual Values**' tab

EXPECTED VALUES	ACTUAL VALUES
Expected Total	£0.00
Total Entered	£0.00
Card Sales	£0.00
Expected Card	£0.00
Entered Card	£0.00
Cash Sales	£0.00
Start Day Float	£0.00
Paid In	£0.00
Paid Out	£0.00
Expected Cash	£0.00
Entered Cash	£0.00

Register Opened: 2022/10/07 08:58:57

Tap a row then enter the total for the selected field.

Actual cash in drawer

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Let's make a sale

Get trading straight away



- ③ Enter the total amount of cash taken. If you did not accept any cash, just press '**Save & Close**'

14:49

Cancel

EXPECTED VALUES ACTUAL VALUES

Cash

Expected : £0.00

£0.00

7 8 9

4 5 6

1 2 3

- 0 .

C

CANCEL SAVE & CLOSE SAVE & NEXT

Till Balanced END DAY

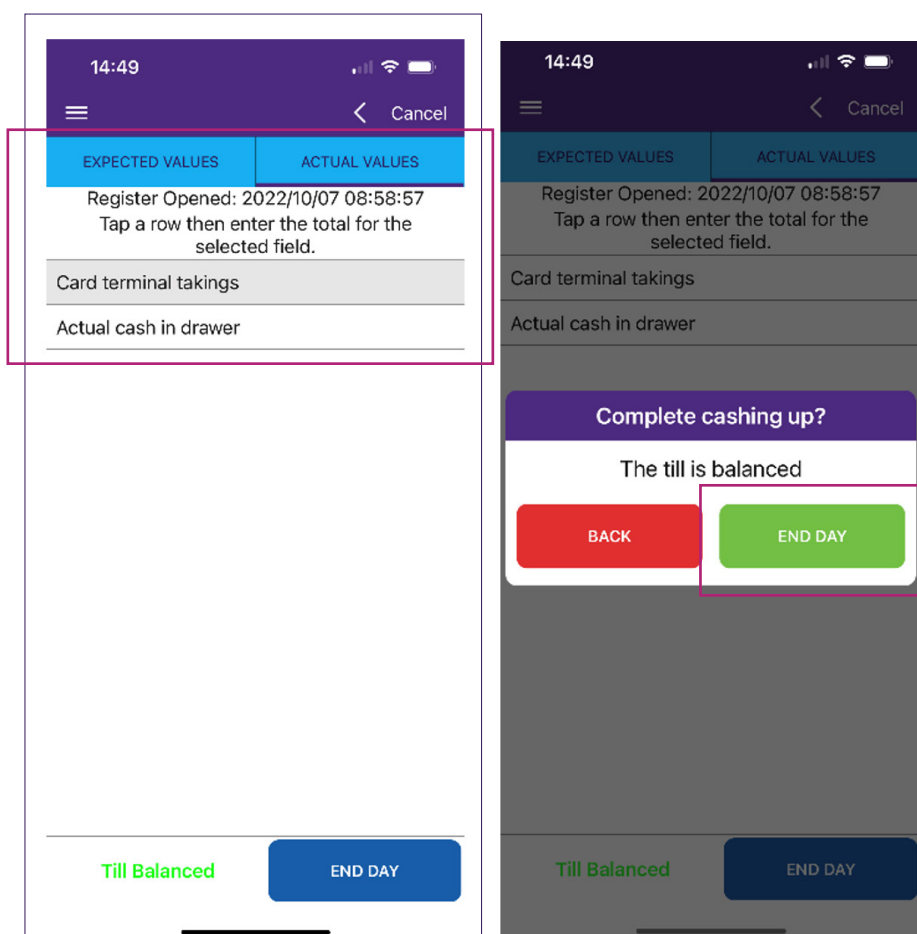


Let's make a sale

Get trading straight away



- ④ Your total takings will be shown. If you see a shortfall or surplus, check the amounts again (this is for your records; it won't affect the amount paid into your account from card sales)
- ⑤ Finally, select '**End Day**'



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I want to do more

Get the most out of Smartpay Anywhere

I need to give a full refund using
'Transaction History'



I need to give a full refund using
the 'RF' button



I need to give a partial refund



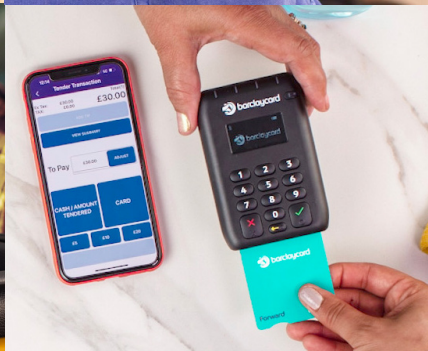
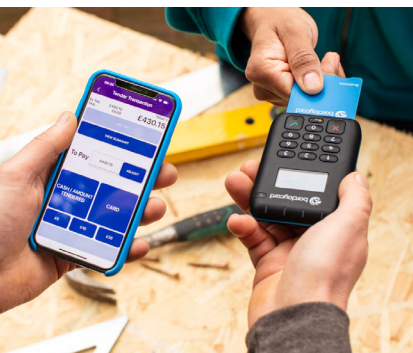
I want to tailor key settings
to my business



I want to know more about
the app buttons



Go to help and support >



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I want to do more

Get the most out of Smartpay Anywhere



I need to give a full refund using 'Transaction History'

- ① Select '**Transaction History**' from the side menu
- ② Use the transaction reference from the receipt to '**Lookup Transaction**' or select date to search
- ③ Tap '**View**' to see the transaction details

Show me what this looks like



- ④ Select '**Refund**' at the bottom
- ⑤ Choose '**Full Refund**' when prompted

Show me what this looks like



- ⑥ The refund will be added to the basket; check it and tap the '**Refund**' button
- ⑦ Select the payment method used in the original transaction: cash or card
- ⑧ Once the refund is complete, you have the option to email the customer a receipt

Show me what this looks like



What do you want to do?

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I want to do more

Help and support

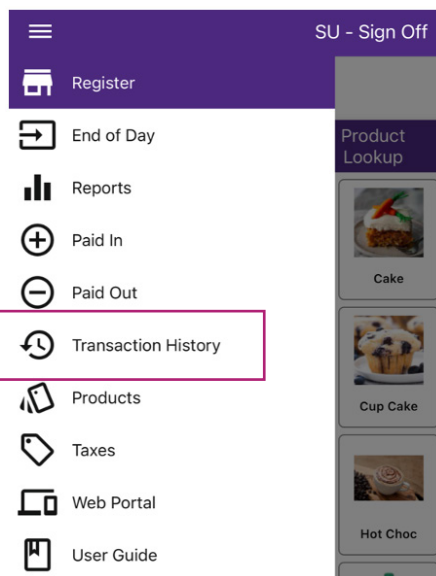


I want to do more

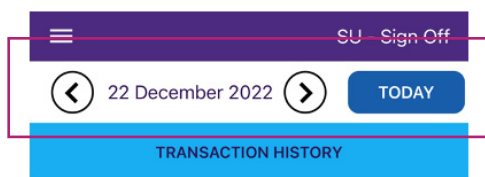
Get the most out of Smartpay Anywhere



- ① Select '**Transaction History**' from the side menu



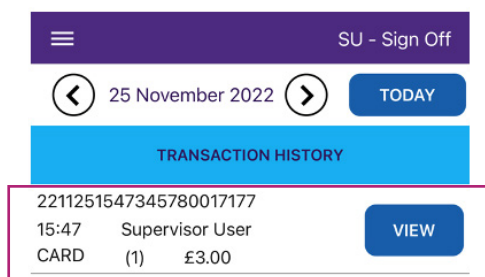
- ② Use the transaction reference from the receipt to '**Lookup Transaction**' or select date to search



OR



- ③ Tap '**View**' to see the transaction details



What do you want to do?

Show me my product

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I want to do more

Get the most out of Smartpay Anywhere



- ④ Select '**Refund**' at the bottom

< 2211251547345780017177

Transaction Details

Americano £3.00

Ex Tax: £3.00
TAX: £0.00
Total: (1) £3.00
Assigned: Supervisor User

EMAIL RECEIPT

TIP ADJUSTMENT

REFUND

- ⑤ Choose '**Full Refund**' when prompted

Refund Type

Please select the refund type

PARTIAL REFUND

FULL REFUND

CANCEL

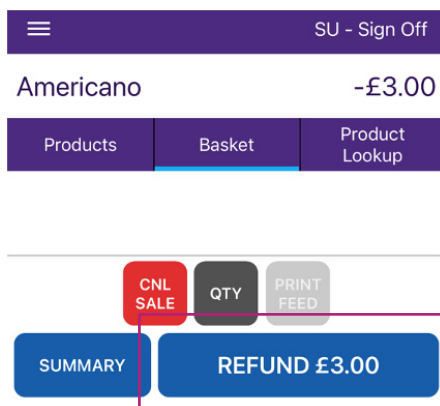


I want to do more

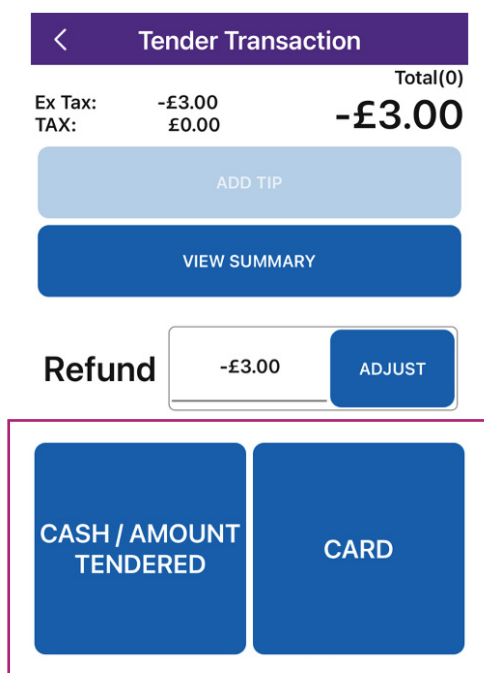
Get the most out of Smartpay Anywhere



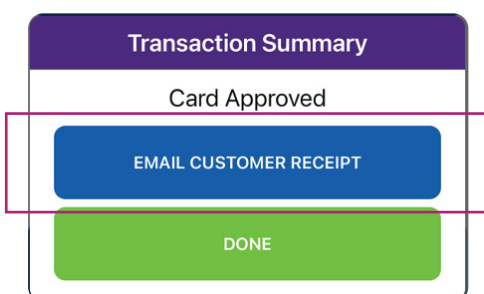
- ⑥ The refund will be added to the basket. Check it and tap the **'Refund'** button



- ⑦ Select the payment method used in the original transaction: cash or card



- ⑧ Once the refund is complete, you have the option to email the customer a receipt



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I want to do more

Get the most out of Smartpay Anywhere



I need to give a full refund using the 'RF' button

- ① In the main product browser, press the **'RF'** (refund) button
- ② On the **'Transaction Lookup'** screen, enter the transaction reference to find the transaction

Show me what this looks like



- ③ Select **'Full'** once you've found the required transaction
- ④ The refund will be added to the basket. Check it and tap the **'Refund'** button

Show me what this looks like



- ⑤ Select the payment method used in the original transaction: cash or card
- ⑥ Once the refund is complete, you have the option to email a customer receipt

Show me what this looks like



What do you want to do?

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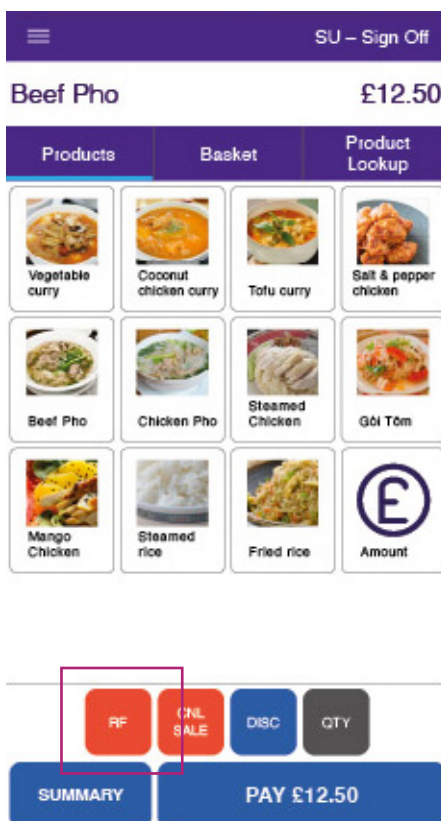


I want to do more

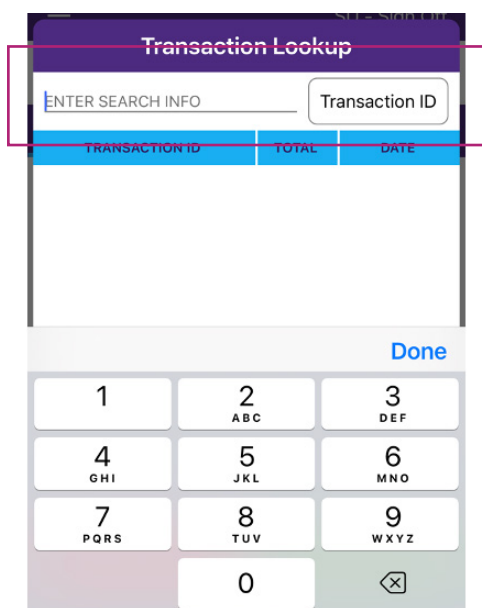
Get the most out of Smartpay Anywhere



- ① In the main product browser, press the **'RF'** (refund) button



- ② On the **'Transaction Lookup'** screen, enter the transaction reference to find the transaction





I want to do more

Get the most out of Smartpay Anywhere



- ③ Select **'Full'** once you've found the required transaction

Transaction Lookup

Transaction ID

TRANSACTION ID	TOTAL	DATE
2211251547345780017177	£3.00	2022-11-25

PARTIAL

FULL

CLOSE

MANUAL REFUND

- ④ The refund will be added to the basket. Check it and tap the **'Refund'** button

≡

SU - Sign Off

Americano

-£3.00

Products

Basket

Product Lookup

Americano

-£3.00

REFUND

CNL SALE

QTY

PRINT FEED

SUMMARY

REFUND £3.00

What do you want to do?

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I want to do more

Get the most out of Smartpay Anywhere



- ⑤ Select the payment method used in the original transaction: cash or card

<

Tender Transaction

Total(0)

Ex Tax: -£3.00

TAX: £0.00

-£3.00

ADD TIP

VIEW SUMMARY

Refund

-£3.00

ADJUST

CASH / AMOUNT TENDERED

CARD

- ⑥ Once the refund is complete, you have the option to email a customer receipt

Transaction Summary

Card Approved

EMAIL CUSTOMER RECEIPT

DONE

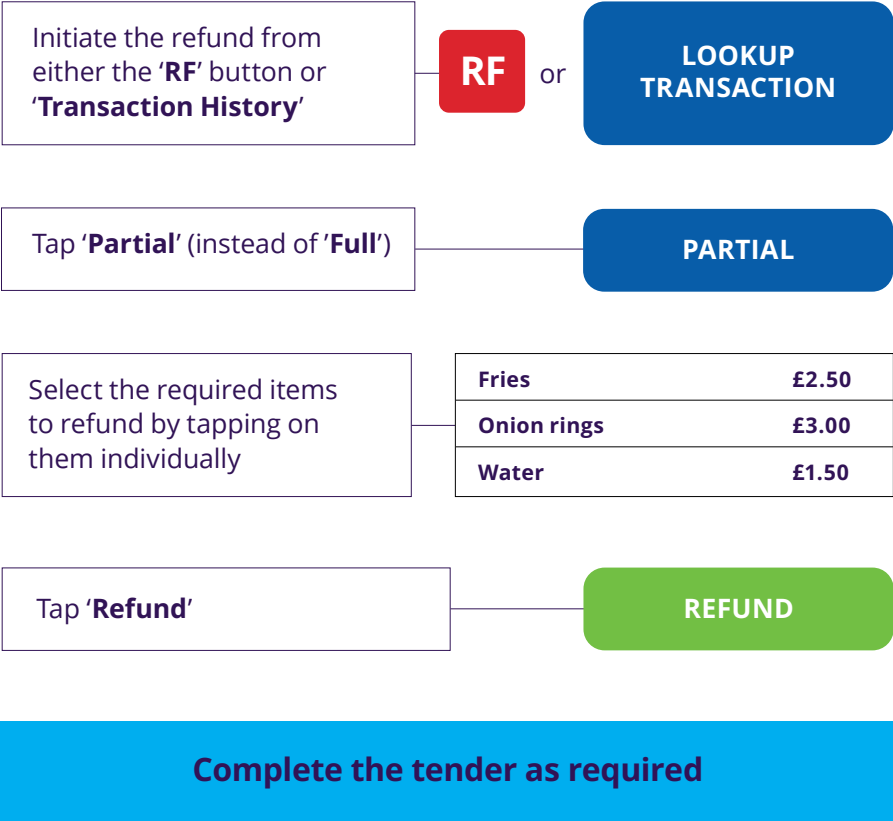


I want to do more

Get the most out of Smartpay Anywhere



I need to give a partial refund



What do you
want to do?

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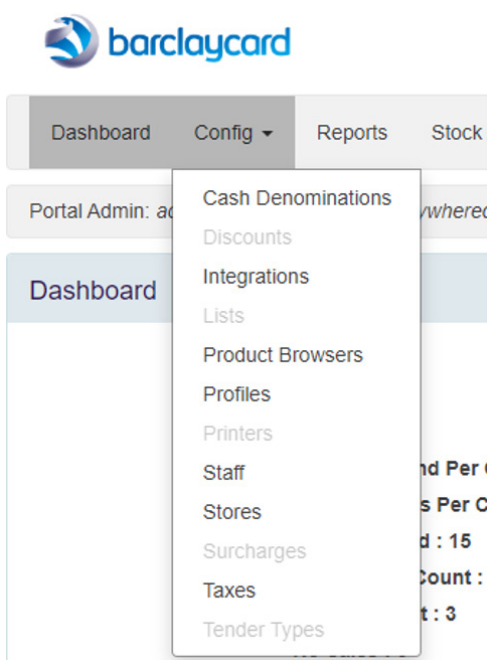
I want to do more

Get the most out of Smartpay Anywhere



I want to tailor key settings to my business

- 1 Log on to the online portal. In the top navigation, go to the '**Config**' tab and select '**Profiles**' from the drop-down menu



- 2 Key settings to review

Your day end is set to happen automatically at midnight.

- If you'd prefer to manually end day, go to:
General > End of Day > Automatically end day
- If you need to change the end day time go to:
General > End of Day > Auto end day time

Check which functions your staff are able to access.

- To add or remove privileges or access to functions go to:
User Permissions > Function Access



I want to do more

Get the most out of Smartpay Anywhere



I want to know more about the app buttons

<div>PRODUCTS</div>	<div>Product browser</div> <div>Show all products uploaded to the inventory.</div>	<div>QTY</div>	<div>Quantity</div> <div>Add multiple quantities of a single item – before adding an item, tap 'Qty' and enter the quantity using the keypad, then add the item. Change the quantity of an item – select item and tap 'Qty'.</div>
<div>Café Latte (Med)</div>	<div>Items</div> <div>Quickly add an item to the transaction with a single tap. You can also search for it or scan the item's barcode.</div>		
<div>VOID ITEM</div>	<div>Void</div> <div>Remove an item from the basket – simply tap 'Void item' and then select the item you want to void.</div>	<div>CASH/ AMOUNT TENDERED</div>	<div>Cash</div> <div>Exact-amount cash payments – simply press the 'Cash' button to complete the transaction. Other cash amounts – enter the amount tendered via the keypad before tapping 'Cash'.</div>
<div>CNL SALE</div>	<div>Cancel sale</div> <div>Cancel the current transaction. This will remove all items and you will be ready to start the next transaction.</div>	<div>CARD</div>	<div>Card</div> <div>Process a card payment by tapping 'Card' and following the on-screen instructions.</div>
<div>RF</div>	<div>Refund</div> <div>Add an item to be refunded to the transaction. Tap 'RF' and then add the item to be refunded.</div>	<div>£20</div>	<div>Quick tender</div> <div>If a customer is paying with a single banknote, you can save time using the quick-tender buttons – simply tap the corresponding button for the banknote being presented.</div>
<div>DISC</div>	<div>Discount</div> <div>Single-item discount – tap an item first, then tap 'Disc' and follow the instructions. Whole-transaction discount – simply tap 'Disc' and follow the instructions.</div>	<div></div>	<div>Menu</div> <div>Access other areas of your Smartpay Anywhere, such as 'End Day', 'Reports' and 'Stock'.</div>
<div>PRICE OVRD</div>	<div>Price override</div> <div>Change the price of an item in a transaction – select the item, tap 'Price Ovrd' and follow the instructions.</div>	<div>UPDATE DATA</div>	<div>Update data</div> <div>Synchronise your Smartpay Anywhere with the latest information on the web portal – all you need to do is tap the 'Update data' button to start the process.</div>

What do you
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Let's make
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I want to
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Help and
support



I want help and support

We're just a phone call or email away



Access dedicated support and help
for Smartpay Anywhere

0800 0920 808

Monday to Sunday: 24 hours

UK public holidays: Open except Christmas Day

barclaycard.co.uk/cardmachinehelp

Calls to 0800 numbers are free from UK landlines and personal mobiles, otherwise call charges may apply. International calls will be charged at a higher rate. Please check with your service provider. Calls may be monitored or recorded in order to maintain high levels of security and quality of service.

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