



Merchant Dashboard User Guide

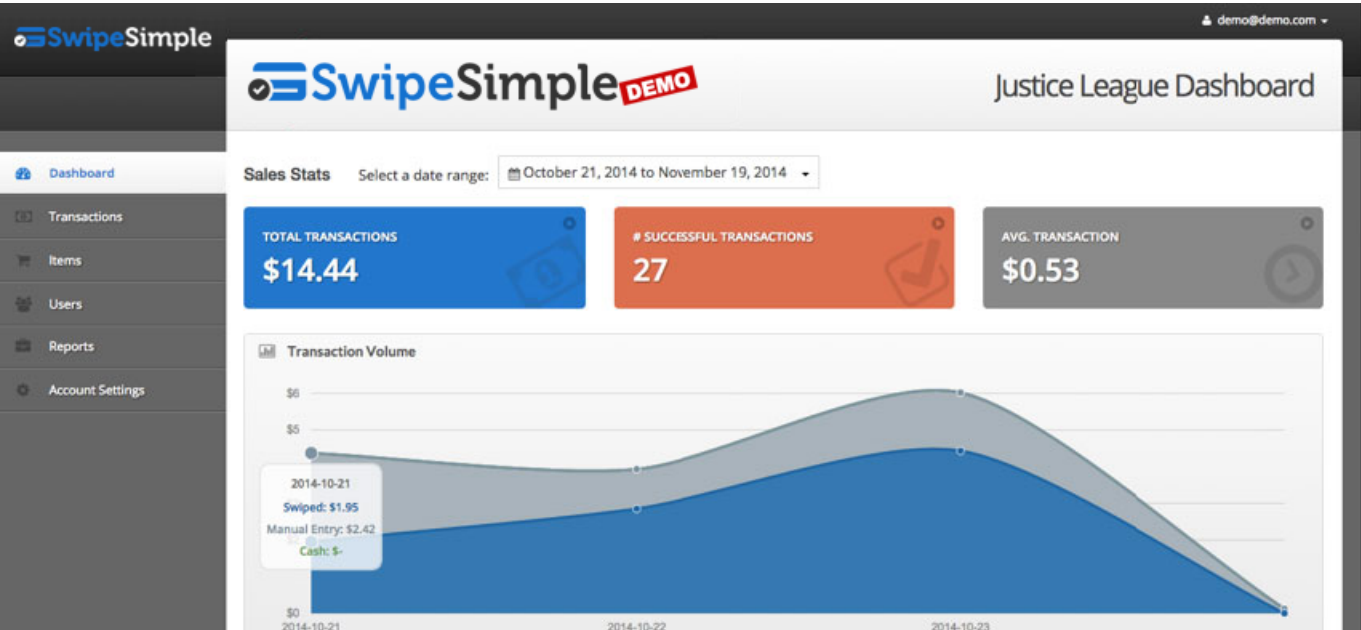
February 10, 2015

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Dashboard

On the Dashboard page, you can get summaries of your sales data at a glance.



1. Total Transactions

The total revenue processed through SwipeSimple, for the specified date range.

2. Successful Transactions

The total number of successfully processed transactions, for the specified date range.

3. Average Transaction

Total Transactions divided by Successful Transactions, for the specified date range.

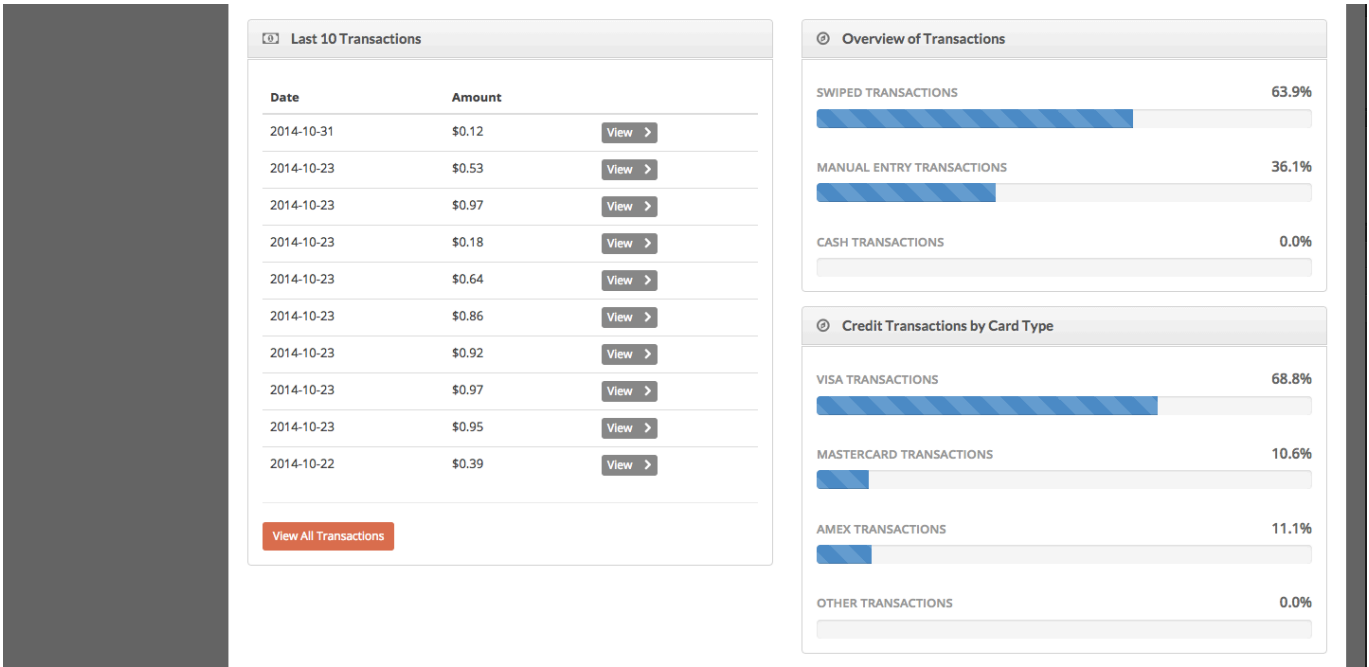
The screenshot shows the date range selection dropdown menu. It lists several predefined ranges: Today, Yesterday, Last 7 Days, Last 30 Days (selected), This Month, Last Month, and Custom. Below the list are input fields for 'FROM' (10/21/2014) and 'TO' (11/19/2014), and buttons for 'Submit' and 'Clear'.

4. Customize the date range for your data

Click the date dropdown, and choose your desired date range from the list.

To see your data between two specific dates, click the dates under “From” and “To”, and choose “Submit”.

Scroll down the Dashboard page, and you will see more information.



5. Last 10 Transactions
Shows you the 10 most recent transactions for your business, starting backwards from the latest date specified in the date range.

You can click on each transaction to see the details, or go straight to the main Transactions page by clicking “View All Transactions”.

6. Overview of Transactions
Shows you the percentages of swiped, manually entered, and cash transactions over the date range specified.

7. Credit Transactions by Card Type
Shows you the percentages of VISA, Mastercard, AMEX and other card types used to pay at your business, over the date range specified.

Transactions

On the Transactions page, you can view your transactions in deep detail, create new key-entered transactions, perform voids and refunds, and resend receipts.

SwipeSimple DEMO Justice League Transactions

Export Transactions list in CSV format

Create a new transaction

Items to show: 10

Search...

TRANSACTION NUMBER	DATE	ACCOUNT NAME	MERCHANT ACCOUNT	AMOUNT	CARD	TRANSACTION TYPE	METHOD	RESULT
1013807350	11/19/2014 12:21:34	Justice League	StripeStagingTest	\$10.00		Sale	Keyed	Errored
1093590807	11/13/2014 10:23:33	Justice League	SwipeSimpleTestMA	\$0.01		Sale	Keyed	Errored
1064553280	11/13/2014 10:23:14	Justice League	StripeStagingTest	\$0.00		Sale	Keyed	Errored
1010785504	11/13/2014 10:23:04	Justice League	StripeStagingTest	\$0.00		Sale	Keyed	Errored
1062285083	11/13/2014 10:22:55	Justice League	StripeStagingTest	\$0.01		Sale	Keyed	Errored
1041638720	10/31/2014 15:22:36	Justice League	Demo merchant account	\$0.12	Visa-1111	Sale	Keyed	Approved

1. Transactions overview

You can organize the order of the transactions based on key details. For instance, click on “Amount” to order transactions based on their monetary value.

To search for a specific transaction, key in any of the details in the search field on the right.

2. Voids, Refunds, and resending receipts

To perform these actions, click the transaction number of the desired transaction.

3. Export Transactions list in CSV format

Click to download a CSV file containing data of all your transactions. Useful if you want to integrate your data with other software.

4. Create a new transaction

Turn your dashboard into a point-of-sale using this feature. Click the “Create a new transaction” button, and enter the details for your new transaction, which SwipeSimple will process directly on the dashboard.

Transaction Details

On the Transaction Detail page for each transaction, you can view deeper details, void and refund the transaction, and resend email and SMS receipts.

The screenshot displays the SwipeSimple interface for a transaction detail. On the left is a sidebar with navigation links: Dashboard, Transactions (selected), Items, Users, Reports, and Account Settings. The main header shows the SwipeSimple logo with a 'DEMO' tag and the text 'Justice League Transactions'. The transaction details are as follows:

Transaction Detail	
Transaction Number:	1093590807
Merchant Account Name:	SwipeSimpleTestMA
Date:	11/13/2014 10:23:33
Time:	10:23 AM
Auth Code:	
Transaction Type:	Sale
Method:	Keyed
Result:	Errored
Card:	
Amount:	\$0.01
Payment Taken By:	demo@demo.com

Below the details are two buttons: 'Send Email receipt' and 'Send SMS receipt'. To the right, under the 'Signature' heading, it states 'No signature on file for this transaction'. At the bottom, there is a section for 'Transaction Items'.

5. Void and Refund

Click on the respective buttons to void or refund your transaction.

Void transactions can only be done before the batch has closed. If the Void option is not displayed, you may only do a refund instead.

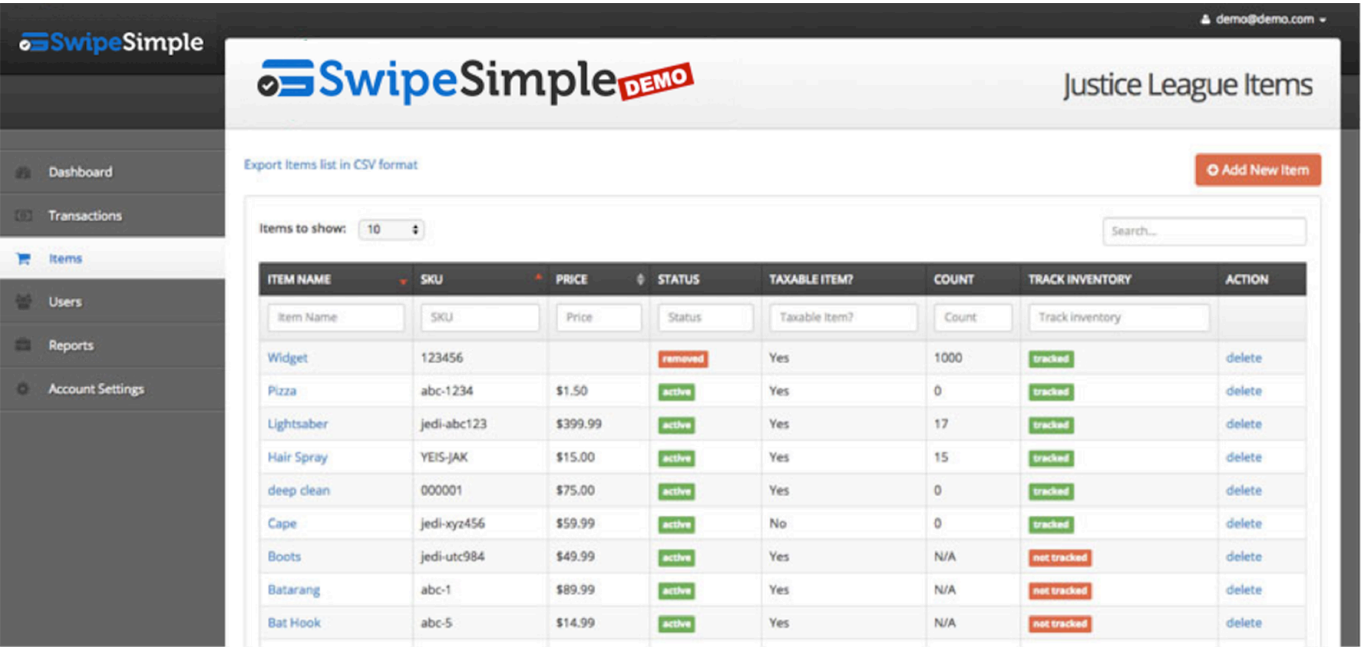
6. Send email and SMS receipt

Click on the buttons to send either an email or SMS receipt.

On the window that appears, type in either the recipient's email or phone number and click the Send button.

Items

On the Items page, you can view and manage your inventory items, create new items, plus export and import lists of items.



1. Items overview

You can organize the order of your inventory items based on key details. For instance, click on “Price” to order items based on the prices you charge.

To search for a specific item, key in any of the key details in the search field on the right.

2. Edit item

To edit an item’s name, price, SKU, taxability, and quantity, click on the item’s name on the table and head to the next page.

3. Export items list in CSV format

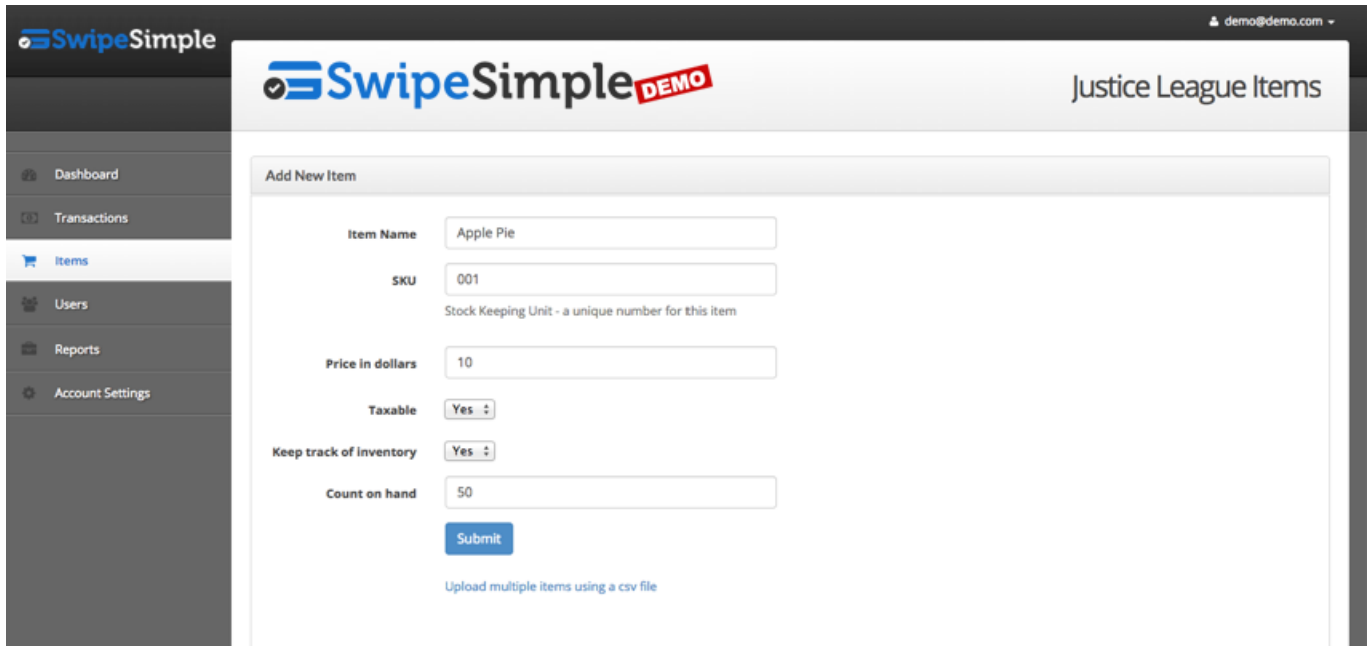
Click this to download a CSV file containing current items in inventory. You can update this CSV file and import it later. Useful for restocking.

4. Add New Item

To add a new item to your inventory, click the “Add New Item” button, and head on to the next page to see how to create a new item.

Add/Edit Items

On the Add New Item/Edit Item page, you can assign a name, price, SKU, taxability, and quantity to a new or existing item.



The screenshot shows the 'Add New Item' form in the SwipeSimple application. The form is titled 'Add New Item' and is located on the 'Items' page of the 'Justice League Items' section. The form includes the following fields and options:

- Item Name:** A text input field containing 'Apple Pie'.
- SKU:** A text input field containing '001'. Below this field is a note: 'Stock Keeping Unit - a unique number for this item'.
- Price in dollars:** A text input field containing '10'.
- Taxable:** A dropdown menu with 'Yes' selected.
- Keep track of inventory:** A dropdown menu with 'Yes' selected.
- Count on hand:** A text input field containing '50'.
- Submit:** A blue button to submit the form.
- Upload multiple items using a csv file:** A link below the Submit button.

5. Upload multiple items using a CSV file

Click this option if you want to import a list of items into SwipeSimple. You will see detailed instructions on how to create a CSV file and upload it.

You can also download a sample CSV file, and edit it to create your own item list.

Users

On the Users page, you can edit settings for each user account on SwipeSimple.

EMAIL	NAME	ROLE	DATE CREATED
demo@demo.com		Admin	05/20/2014 17:37:08 EDT
johnfrank@yahoo.com View Temp Password	John Frank	Admin	06/23/2014 10:10:35 EDT
goo@yahoo.com View Temp Password	Goo Smith	Member	06/26/2014 18:05:25 EDT
dawn@aol.com View Temp Password	Dawn Smith	Member	07/28/2014 14:40:21 EDT
johnj@aol.com View Temp Password	John Smith	Member	07/30/2014 15:44:00 EDT
Kevin@paymentdepot.com	Kevin Hodge	Admin	10/24/2014 18:02:32 EDT
john@email.com View Temp Password	john john	Member	11/12/2014 16:29:13 EST

Add New user

Email

Full name

Role
Member

Merchant Account
No Merchant Account Selected

Create user

1. Add New User

Click the “Add New User” button at the top-right corner, and you will be directed to a new page to enter the user’s details.

You can choose whether you want to create an Admin or Member user.

- Admin users have full access to all transaction data and functions
- Member users can only take payments from their assigned merchant account. They can only void and cannot refund transactions, and can only see their own transaction data.

Passwords will be automatically generated for new users. When new users sign in to either the app or dashboard, they will be prompted to change their passwords.

2. Edit users’ names, roles and merchant account

To edit a user’s account settings, click the email address of the user.

To edit the settings for your own account, click your email on the table. You can change your password here.

Reports

On the Reports page, you can get summaries of your transactions based on key categories: By Users, Items, Day, and Payment Method.

Dashboard

Transactions

Items

Users

Reports

Account Settings

Reporting

Select a date range:

📅 October 21, 2014 to November 19, 2014

User Summary

Email	# of Sales	\$ of Sales	\$ of Tips
demo@demo.com	27	\$14.44	\$0.00
Totals	27	\$14.44	\$0.00

Item Summary

Item	# of Items Sold	\$ of Item Sales	Current Count
Keratin Treatment	9	\$4,491.00	0
Women's Conditioner	12	\$191.88	0
Men's Hair Brush	5	\$99.90	0
Custom Item	1	\$0.12	0
Totals	27	\$4,782.90	0

1. Transaction summaries

- User Summary: See the total number of sales, total monetary value of sales, and total monetary value of tips taken by each user.
- Item Summary: See the total number sold, monetary value sold, and current inventory count of each item.
- Daily Summary: See total sales, tips, taxes, and refunds per day.
- Payment Method Summary: See total number of swiped, manually keyed, and cash charges per day, and their corresponding monetary values.

2. Customize date ranges

Click the date dropdown, and choose your desired date range from the list.

Account Settings

On the Account page, you can customize company transaction settings and customize receipts.

The screenshot shows the SwipeSimple web interface. On the left is a dark sidebar with navigation links: Dashboard, Transactions, Items, Users, Reports, and Account Settings (highlighted with a gear icon). The main content area has a header with the SwipeSimple logo (marked 'DEMO') and the title 'Justice League Settings'. Below the header, the 'Company Settings' section is expanded, showing three sub-sections: 'Signature Settings' with 'Ask for Signature?' set to 'Always ask'; 'Tax Settings' with 'Collect Tax?' set to 'Yes' and 'Tax Rate' at '10.1 %'; and 'Tip Settings' with 'Prompt for Tip?' set to 'No' and 'Default Tip Level 1**' at '15.0 %'.

1. Transaction settings

- Signature Settings: Choose whether you want the app to ask for signatures.
- Tax Settings: Choose whether you want the app to collect taxes, and set the tax rate.
- Tip Settings: Choose whether you want the app to prompt for tips, and set default tip levels.

Receipts Settings

From Address**

demo@demo.com

The email address that will be displayed on the receipt.

Business Name**

Justice League

Please contact your reseller to adjust business name.

2. Receipt settings

Scroll down the page and you'll see customization options for your receipts.

☒ When sending e-receipts to customers, always cc the following address(es) on the email

(separate multiple addresses with commas)

receipts@business.com

Preview Receipt

**These fields are required

Update Settings

3. Send receipts to yourself and your staff

If you want to receive a copy of every receipt sent, input your email address in the field.

To send to multiple addresses, separate the email addresses with commas.

4. Confirming and applying your changes

When you done updating your settings, click the “Update Settings” button to save the information and apply the changes.