Merchant Dashboard User Guide

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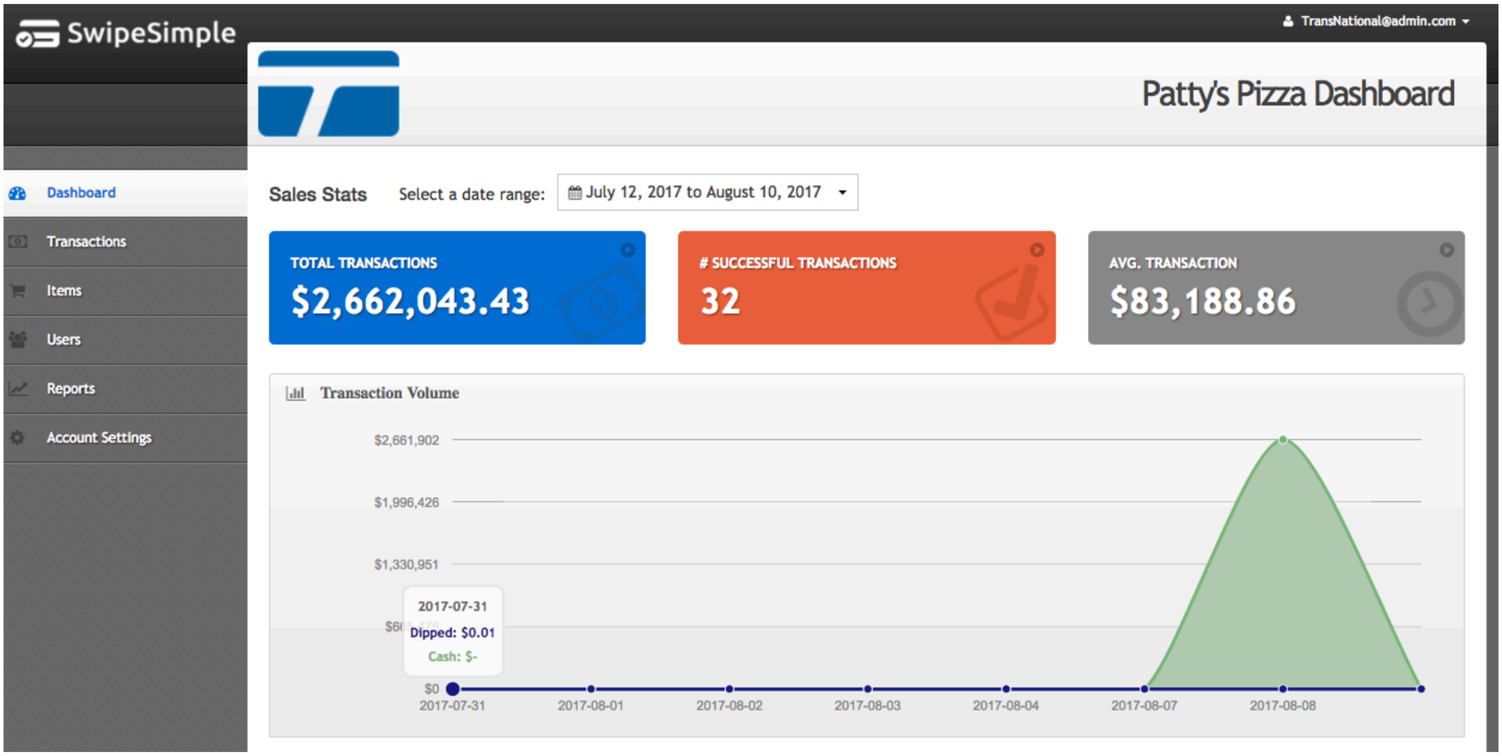
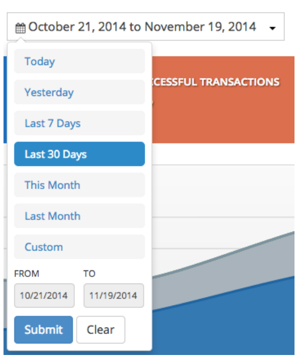
DASHBOARD

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





4. Customize the date range for your data
Click the date dropdown, and choose your desired date range from the list.

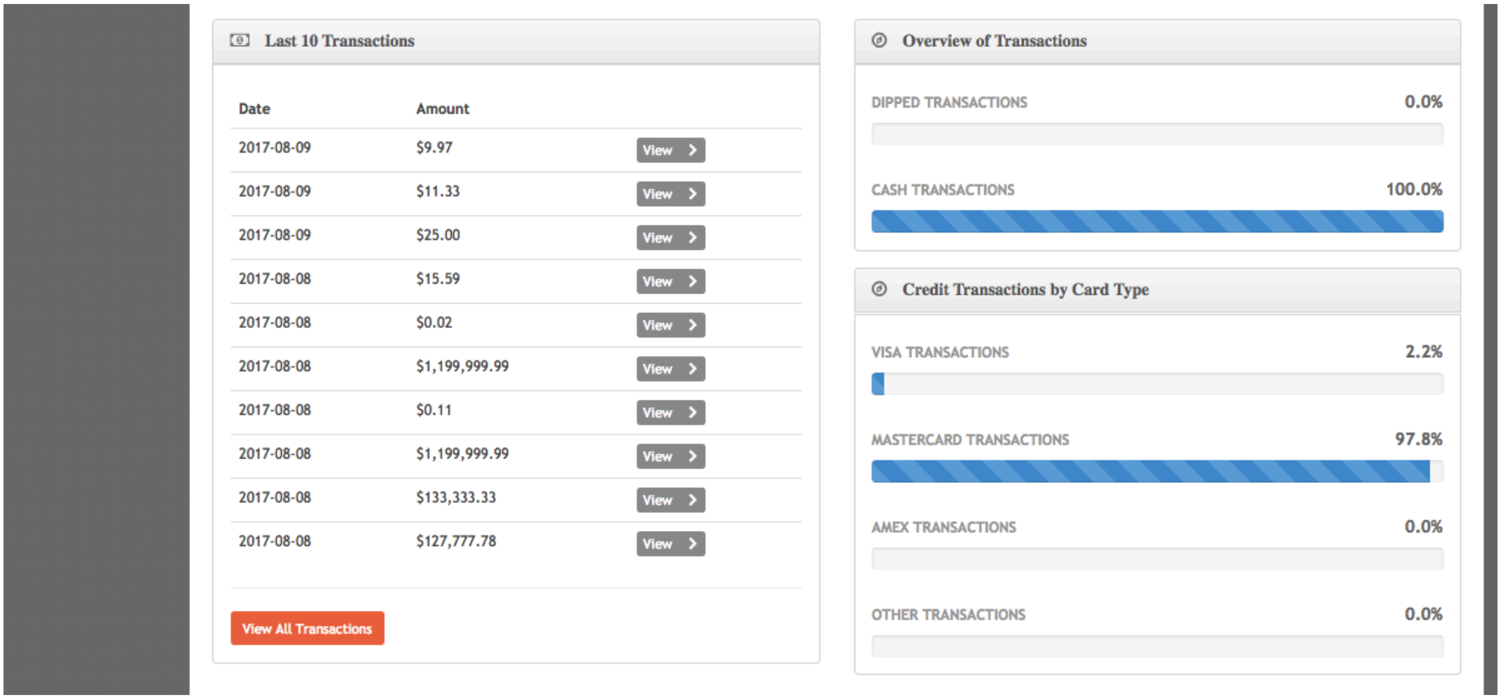
To see your data between two specific dates, click the dates under "From" and "To", and choose "Submit".

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.

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.

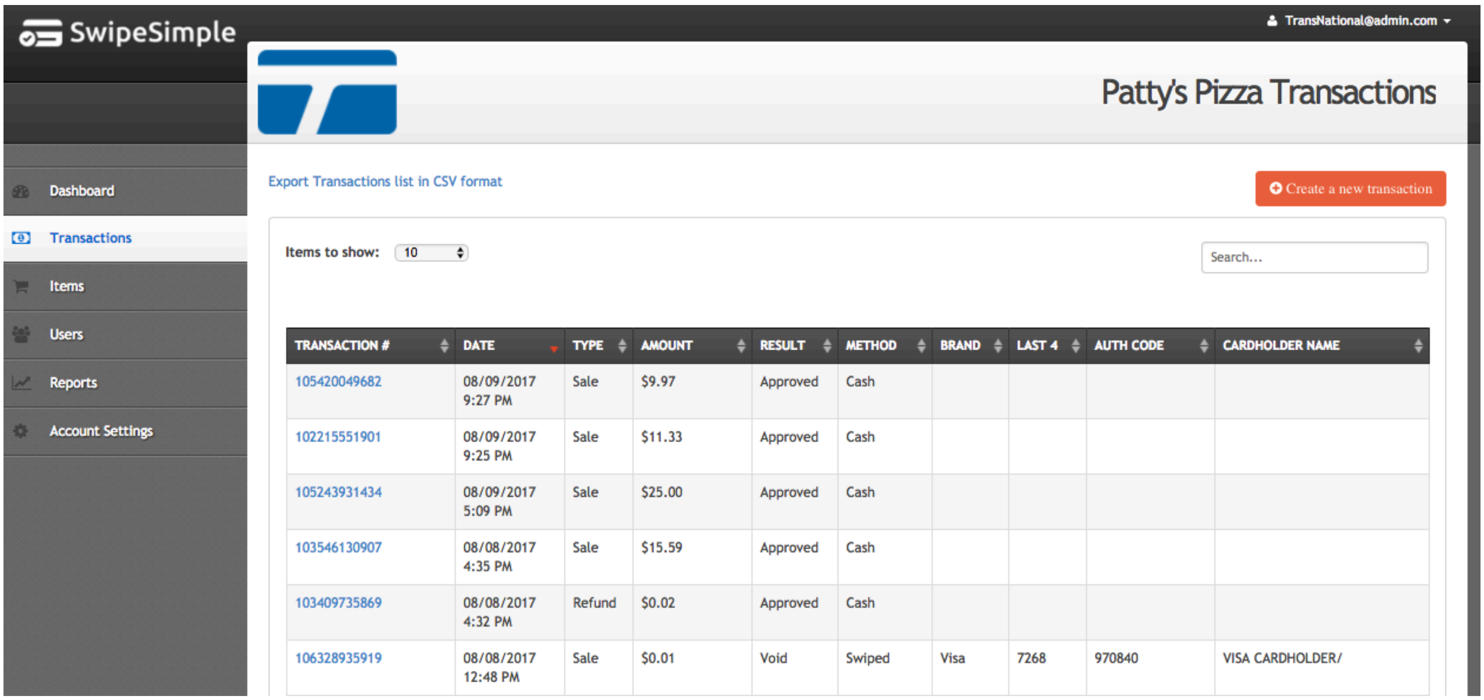
You can click on each transaction to see the details, or go straight to the main Transactions page by clicking “View All Transactions”.

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.



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.

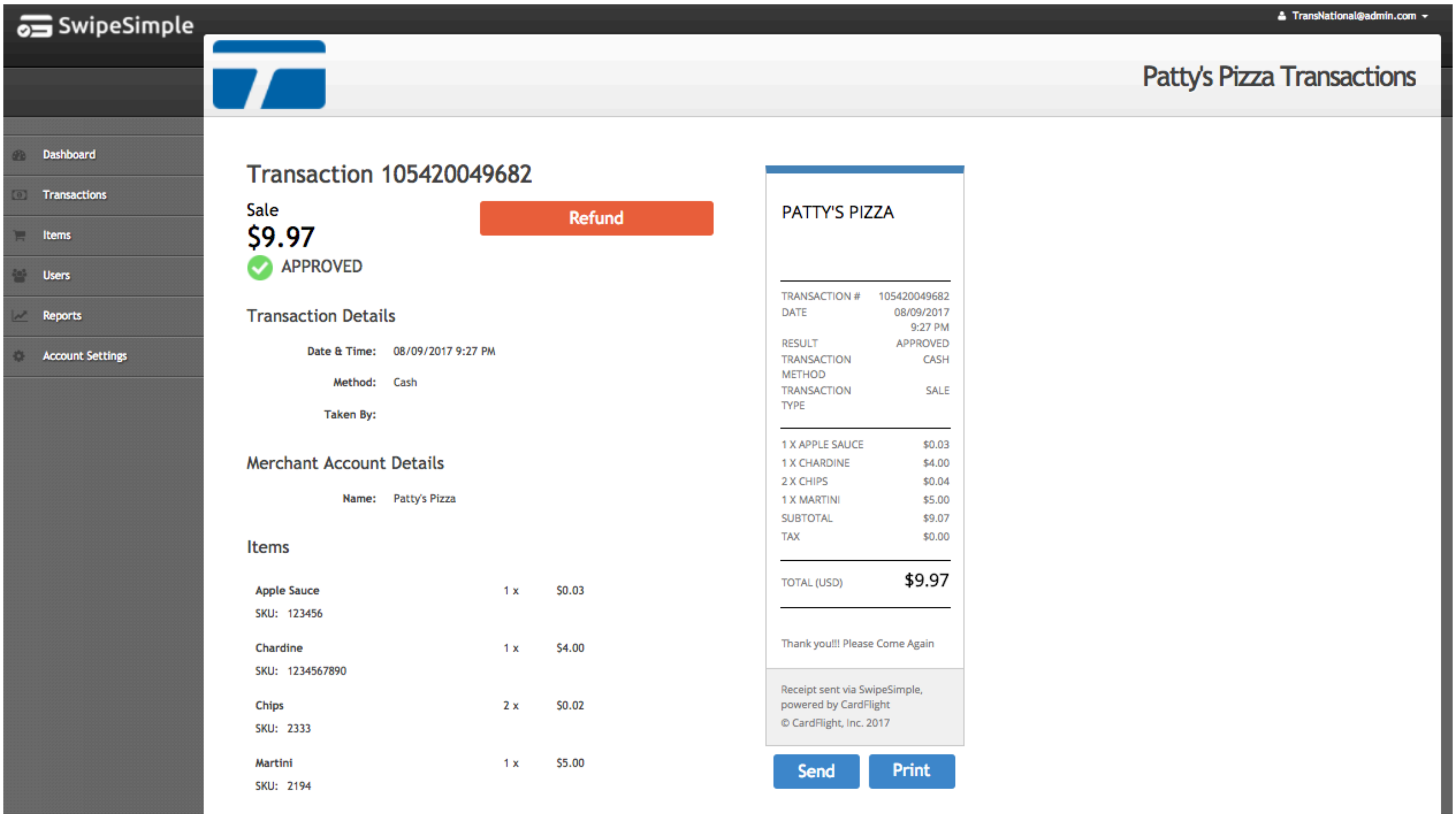
3. Export Transactions list in CSV format
Click to download a CSV file containing data of all your transactions. Useful if you want to integrate your data with other software.

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.



5. Void and Refund
Click on the respective buttons to void or refund your transaction.

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

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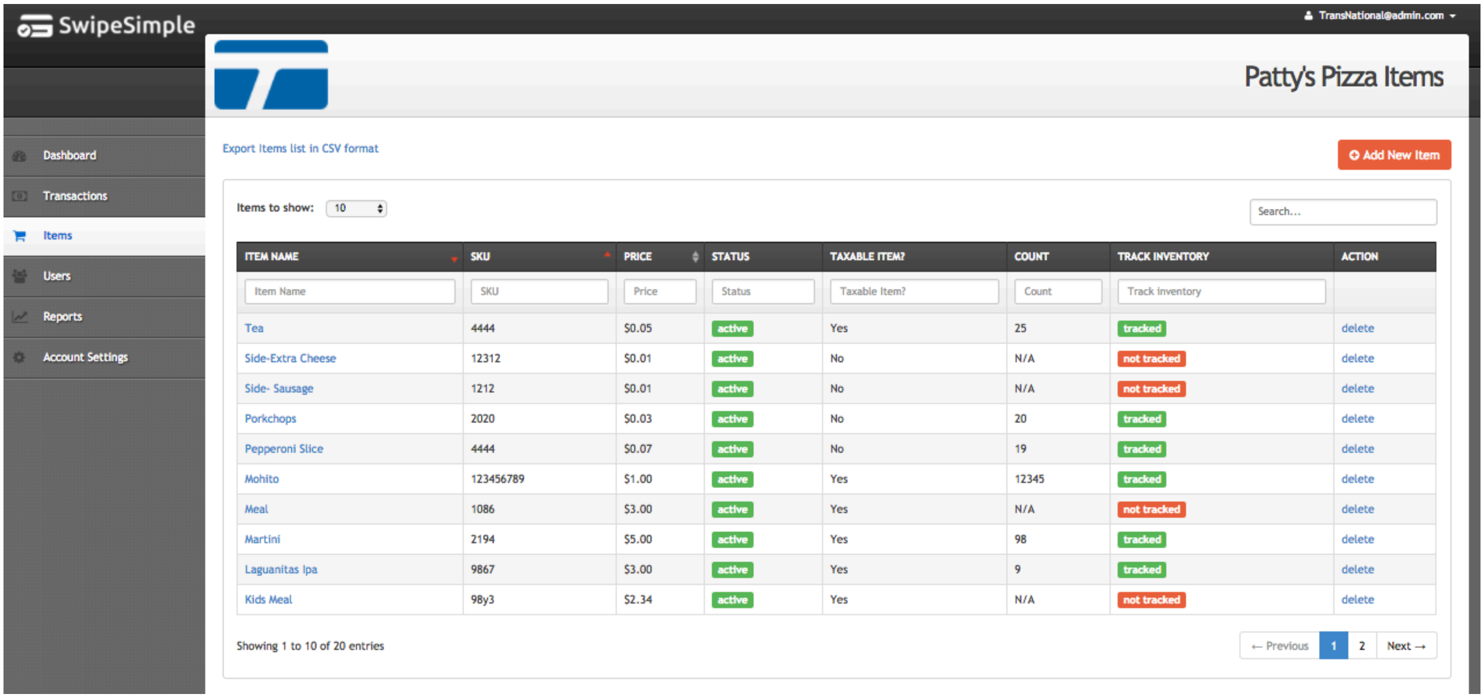
6. Send email and SMS receipt
Click on the buttons to send either an email or SMS receipt.

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.

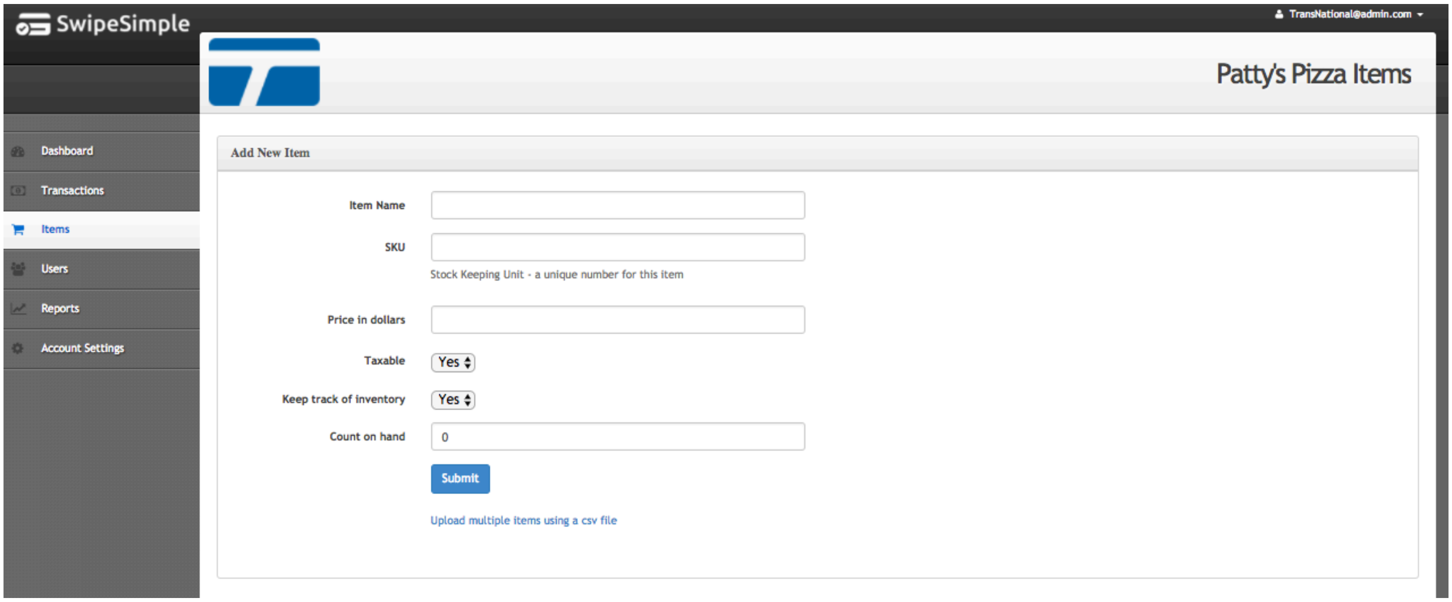
2. Edit item To edit an item's name, price, SKU, taxability, and quantity, click on the item's name on the table and head to the next page.	3. Export items list in CSV format Click this to download a CSV file containing current items in inventory. You can update this CSV file and import it later. Useful 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.

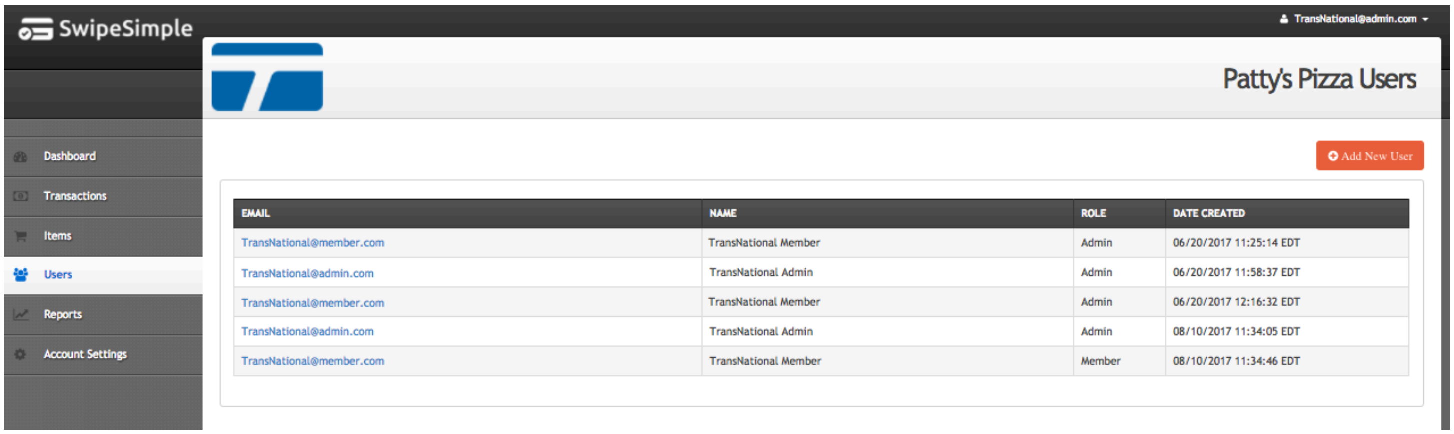


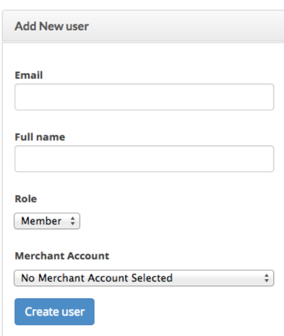
5. Upload multiple items using a CSV file
Click this option if you want to import a list of items into SwipeSimple. You will see detailed instructions on how to create a CSV file and upload it.

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.





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.

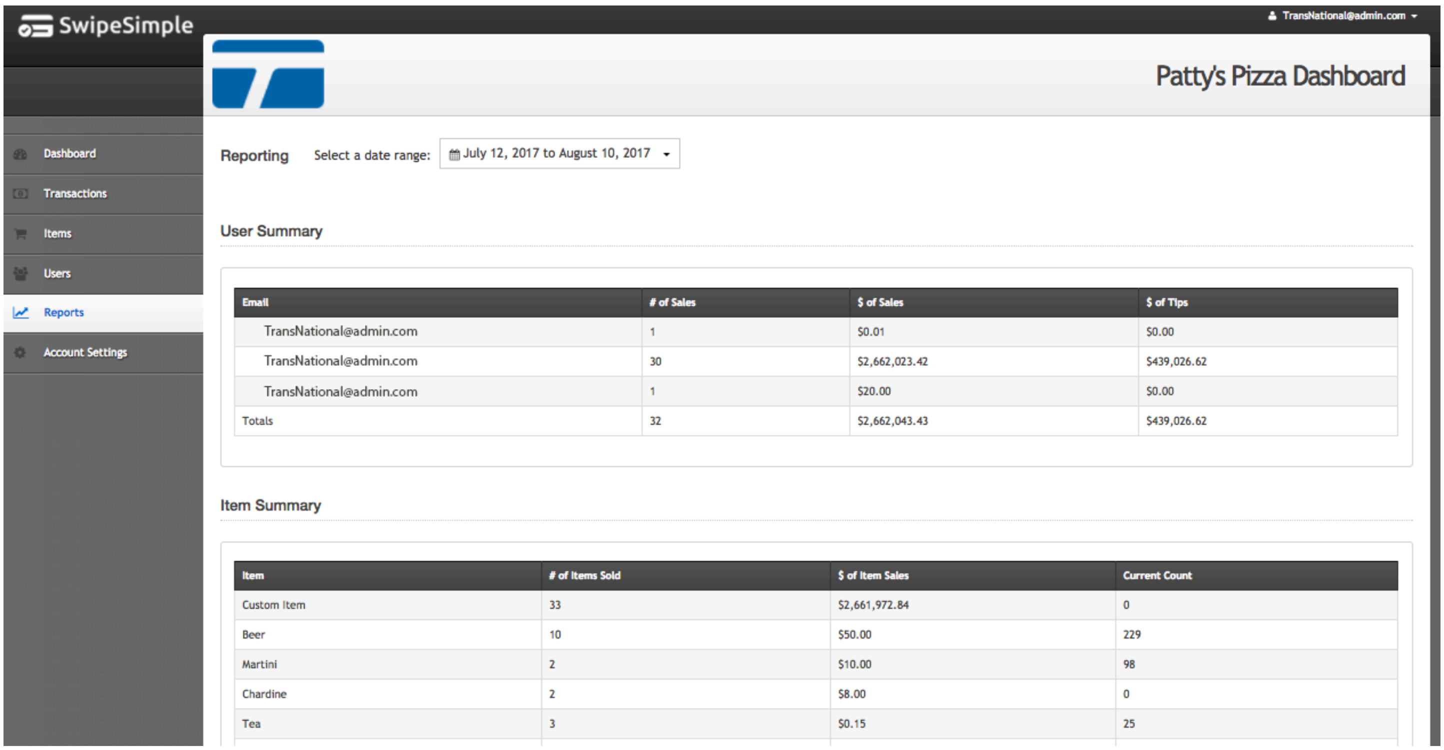
2. Edit users' names, roles and merchant account

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.



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.

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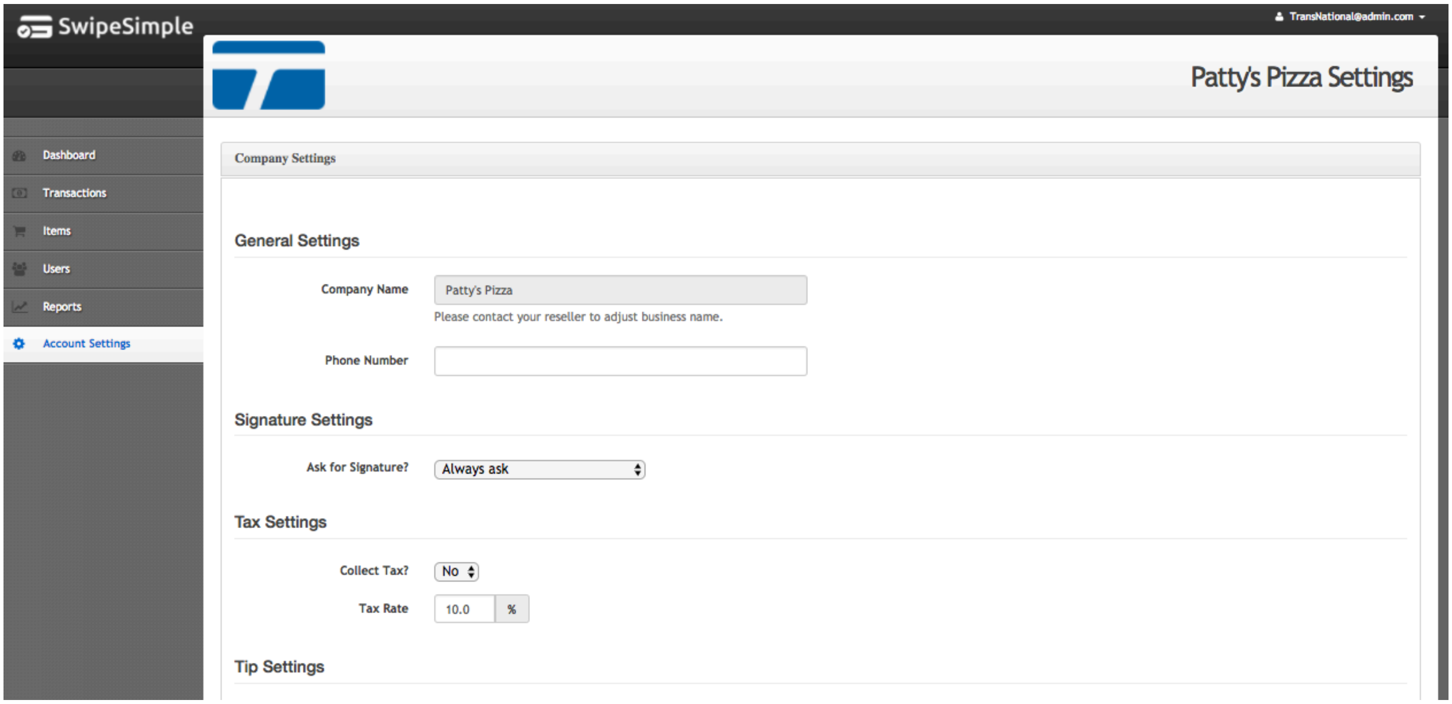
2. Customize date ranges

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

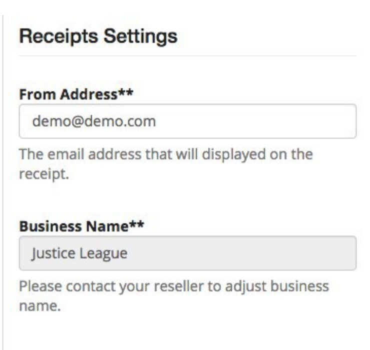
ACCOUNT SETTINGS

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

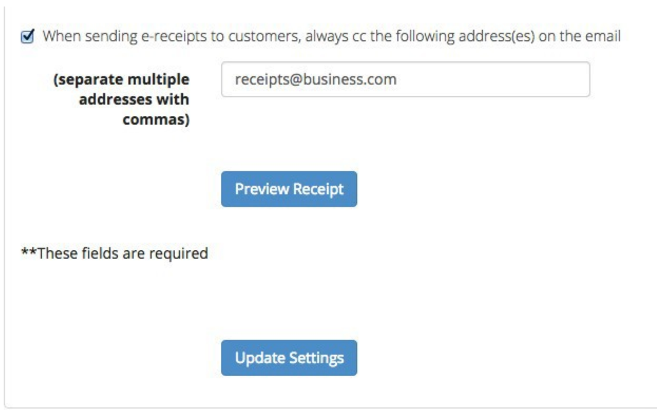


1. Transaction settings

- 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.



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



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.