



Payments Guide

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CONFIDENTIAL
{Date}

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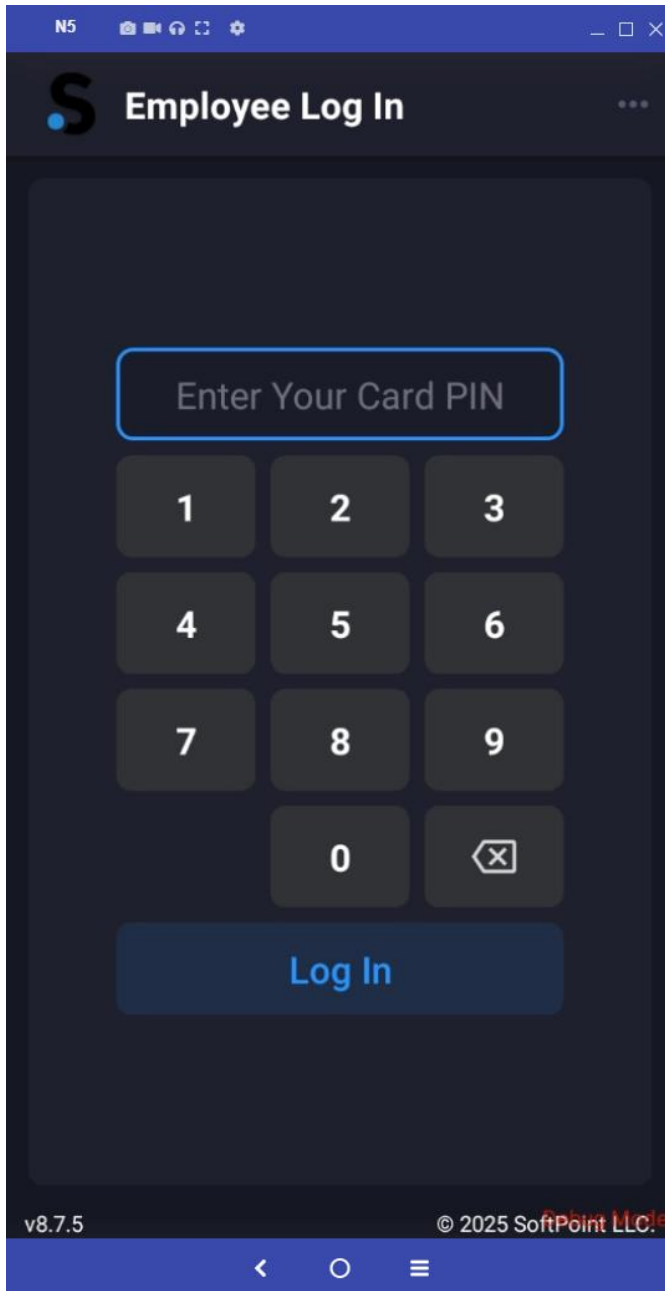
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Introduction

This document will serve as a comprehensive guide on how to use the SoftPoint application to process payments along with refunds and reports. It will provide step-by-step instructions over each area of the application and go over functionality overviews. This will also include instructions on how to report any support issues or cases. It will also include videos going over the payment process and link to the SoftPoint Knowledge Base.

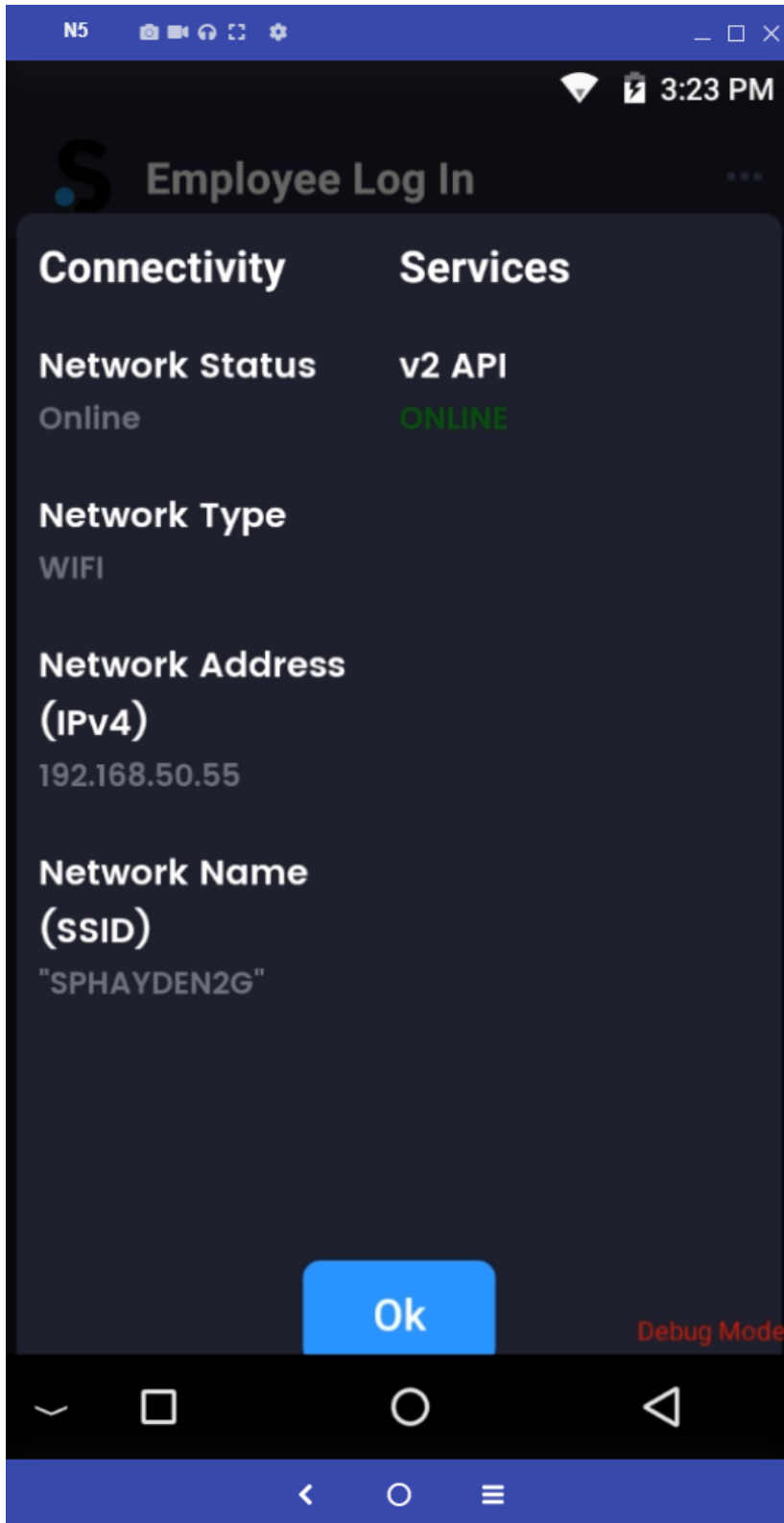
Login Screen

This is the section where you can put in your pin number or swipe your paired mag card to log into the device.

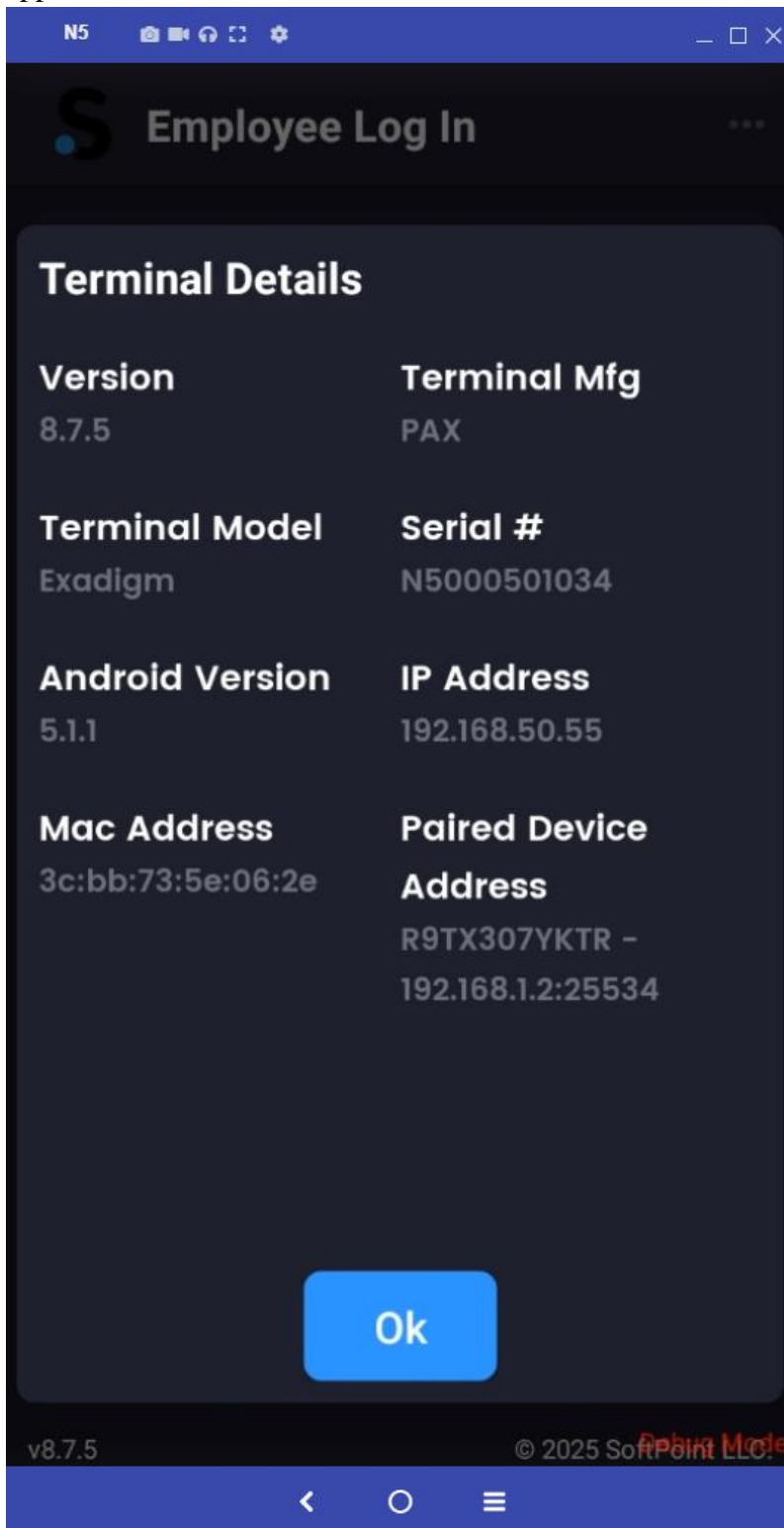


Before logging in there are 3 dots in the upper right-hand corner. When selecting them you will get the following options:

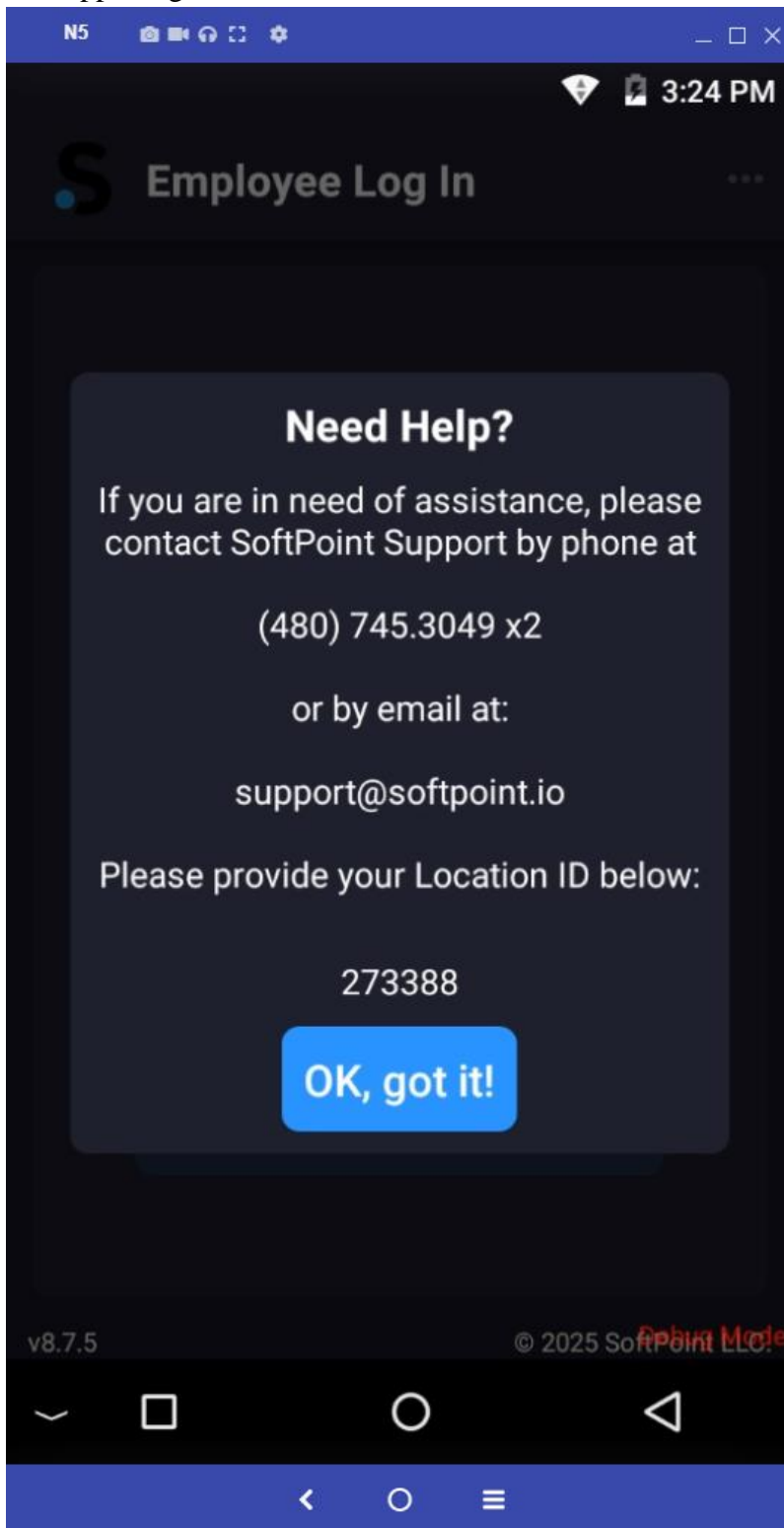
- Connectivity – This where you can check network connection and check to see if you are connected to the SoftPoint services.



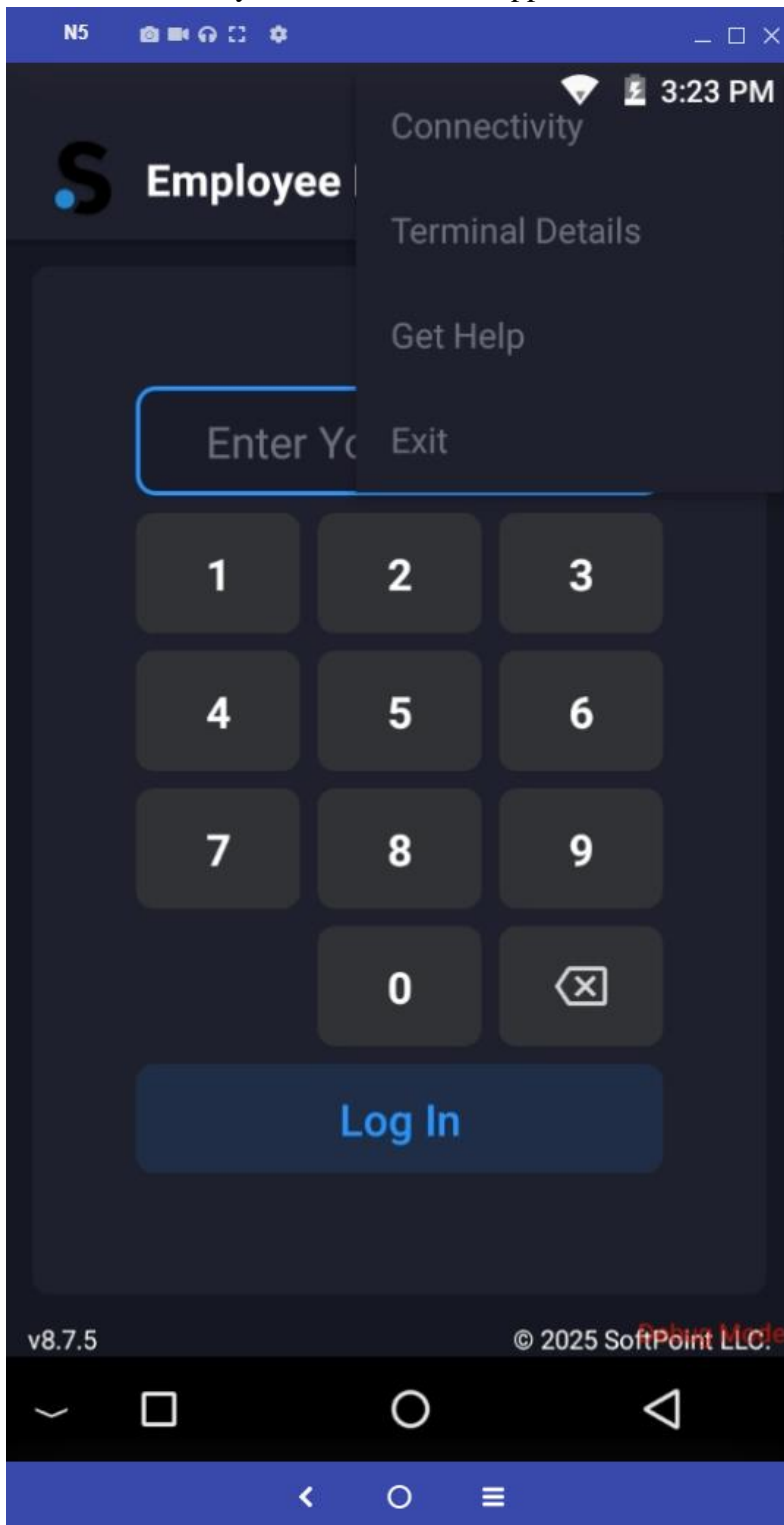
- Device Details – This is where you can see information about the device you are on. From the application version to the device serial number.



- Get Help – You can see the SoftPoint support phone number and email to reach out to if you need any help. This will also have your location's unique ID for SoftPoint that you can give to the support agents.



- Exit – Will allow you to exit from the application.

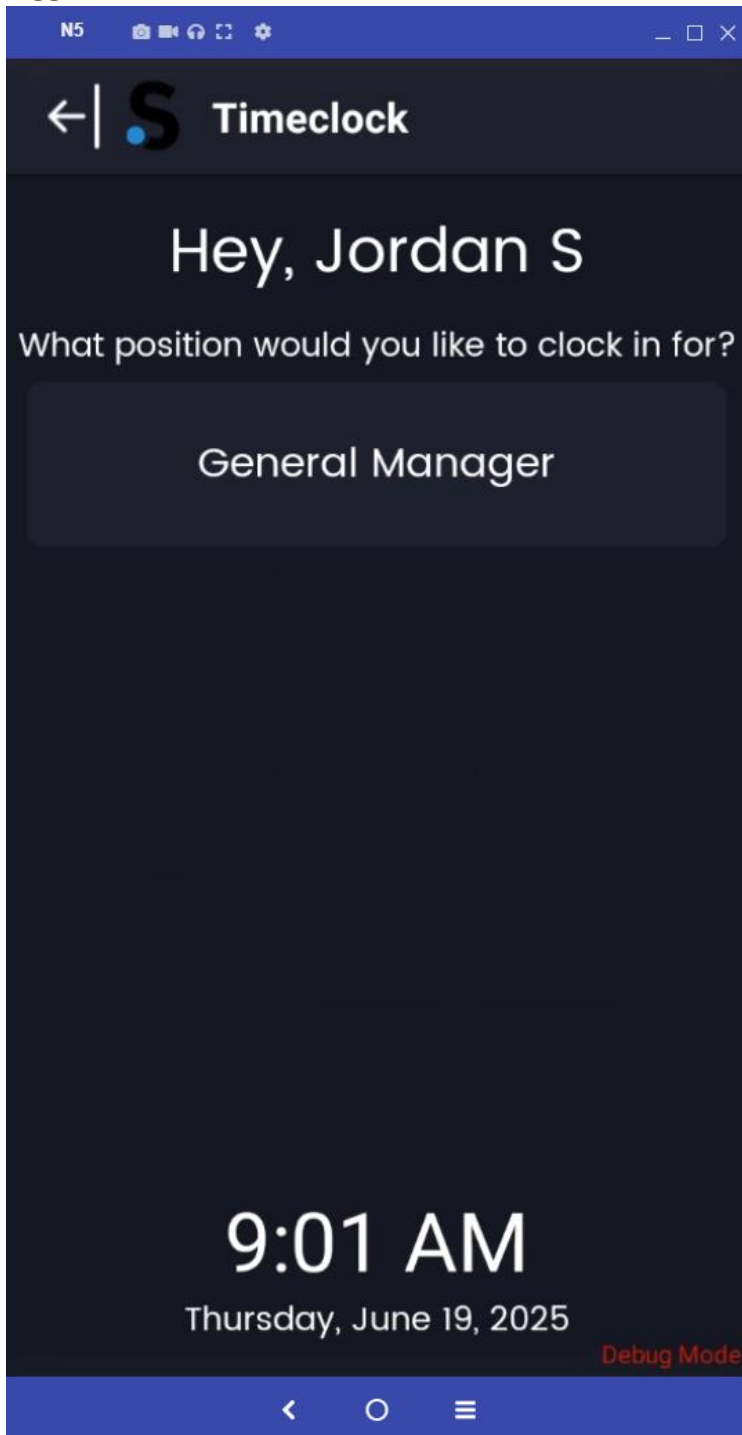


You can then login with the pin number you use in your POS system.

When logging in, you may be prompted to select a position. These will be taken from the job codes or positions you have set on your POS system.

- The positions will determine what level of access you have within the application. That will determine if you can see all current open tickets, apply discounts, and do refunds.

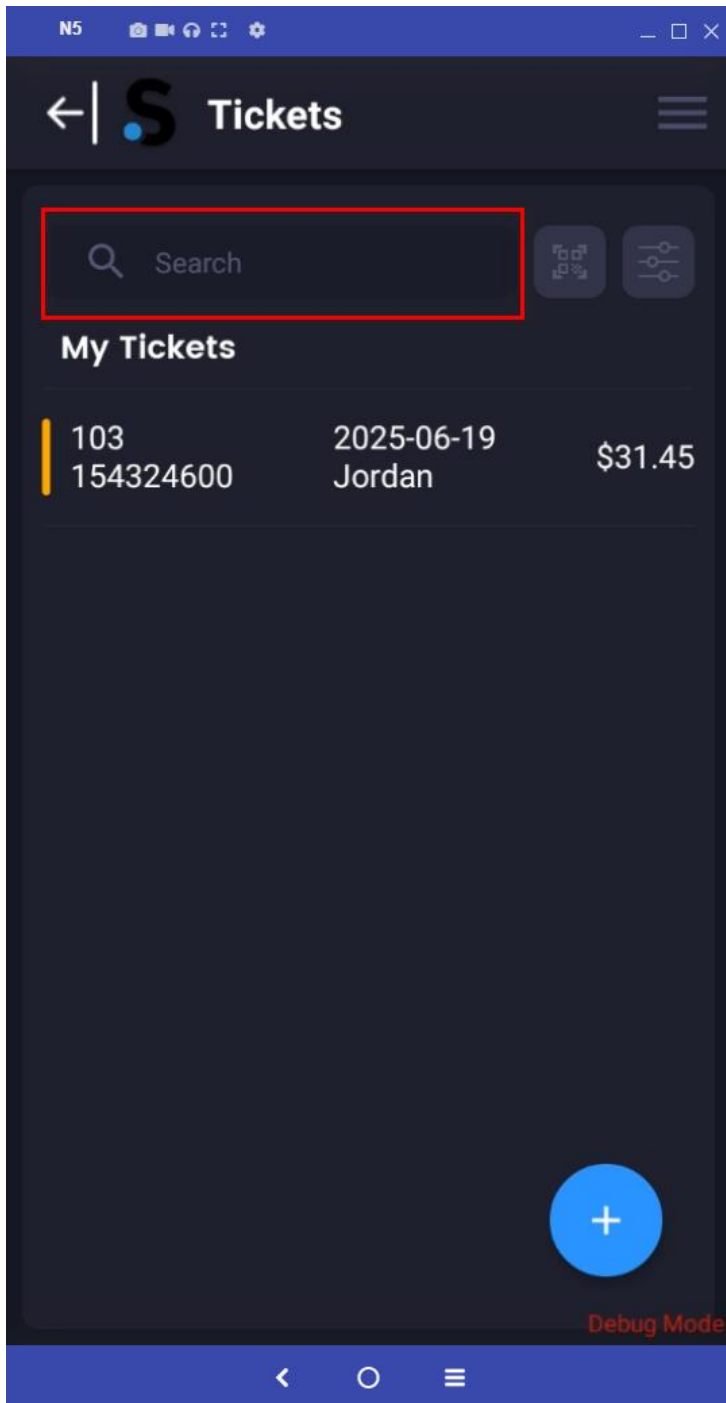
****If your POS system is Aloha, you can be set to automatically login with the same job code you logged into Aloha with****



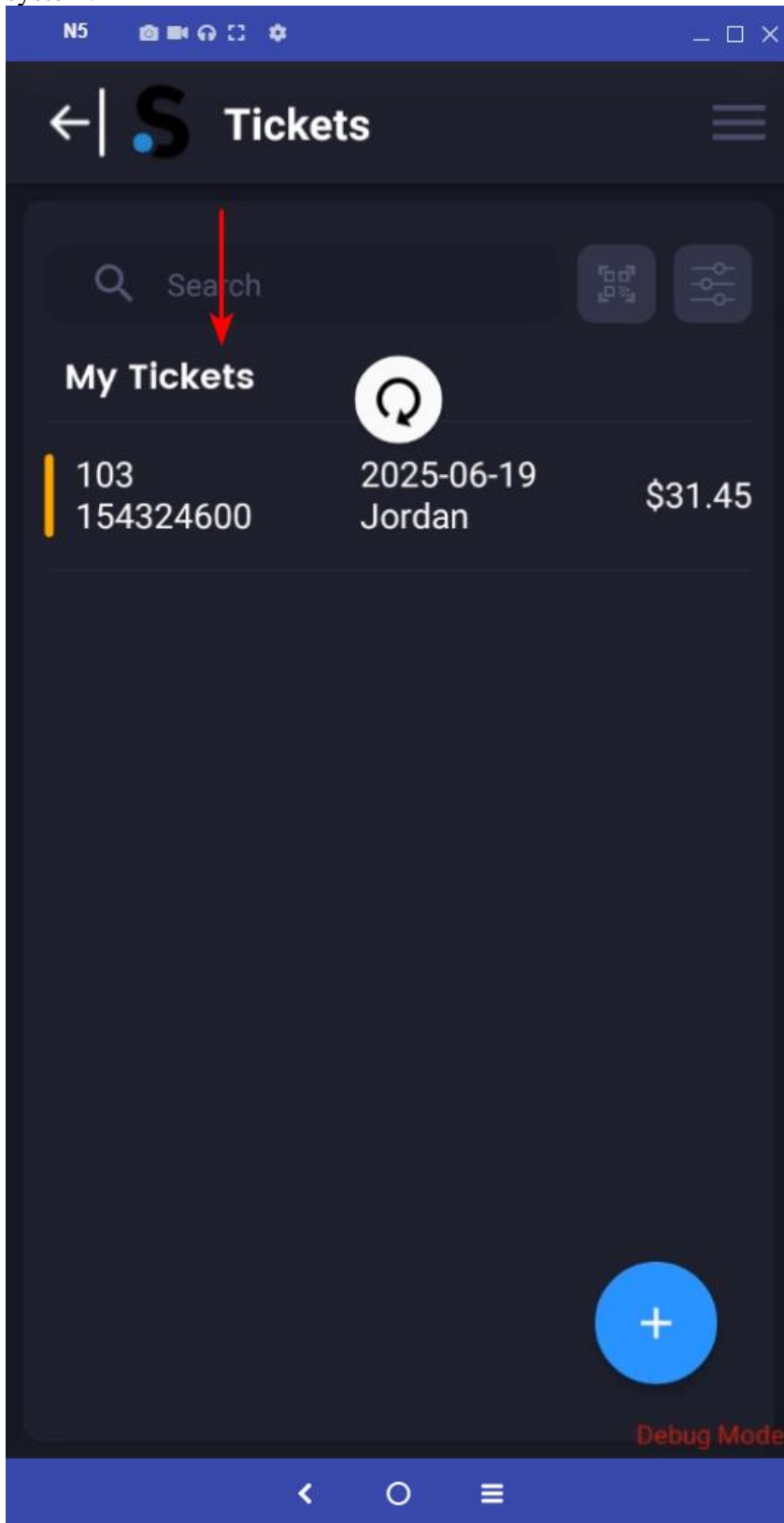
Tickets Page

Once fully logged in, you will see the ticket page where the current open tickets show. From here you can search and see all current open tickets. You can search by the following:

- **Server Name**
- **Table Number/Tab Name**
- **Ticket Number**
- **Price**

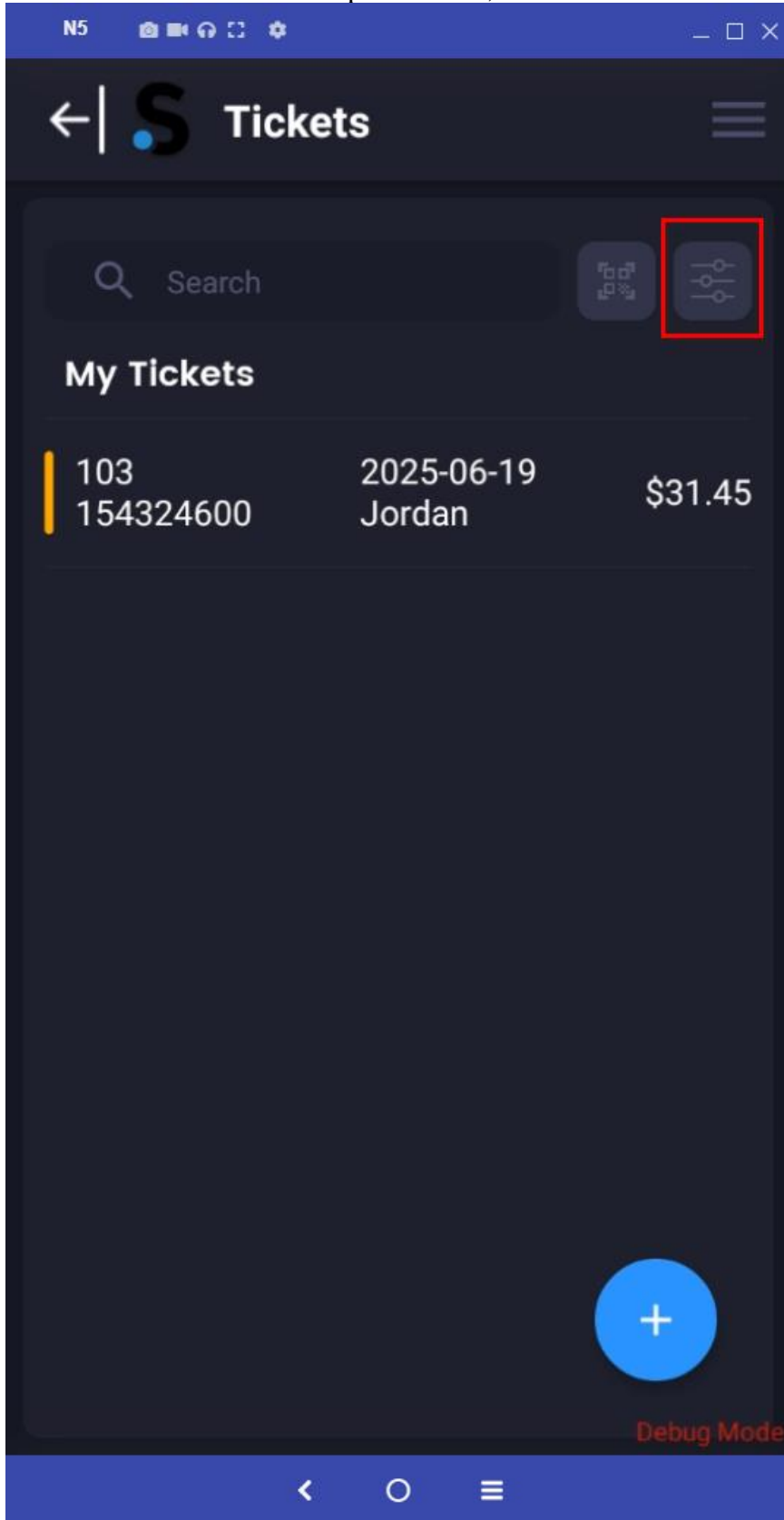


To refresh the list, pull down from the top of the tickets page to get the latest tickets created in the system.



This list will refresh on its own every 30 seconds as well.

To do an advanced search for prior tickets, select the filter button with the three lines and three circles:



Within the advanced search, you have the following sections:

The screenshot shows the 'Advanced Search' dialog box in the Tickets app. The dialog is titled 'Advanced Search' and contains three main sections. The first section, 'Status', has three buttons: 'My Tickets', 'All', and 'Closed'. The second section, 'Date', has a dropdown menu currently set to 'Today'. The third section, 'Employee', has a dropdown menu currently set to 'All Employees'. At the bottom of the dialog are two buttons: 'Cancel' and 'Search'. The background of the app shows the 'Tickets' title and a status bar at the top with 'N5' and '12:12 PM'. A 'Debug Mode' label is visible in the bottom right corner of the app interface.

Status – This will allow you to move between open tickets and closed tickets. My Tickets are your current open tickets, Closed is your closed ticket, and All is both open and closed tickets.

Date – Allows you to view the date of the tickets you are looking up. Defaults to Today.

Employee – You can only see this if you have access to view all current open tickets. Will allow you to select which employee you would like to view tickets under.

Ticket Details

Once you select a ticket on the ticket page, you will then be brought to the ticket details. In here you will see the current information of the ticket including:

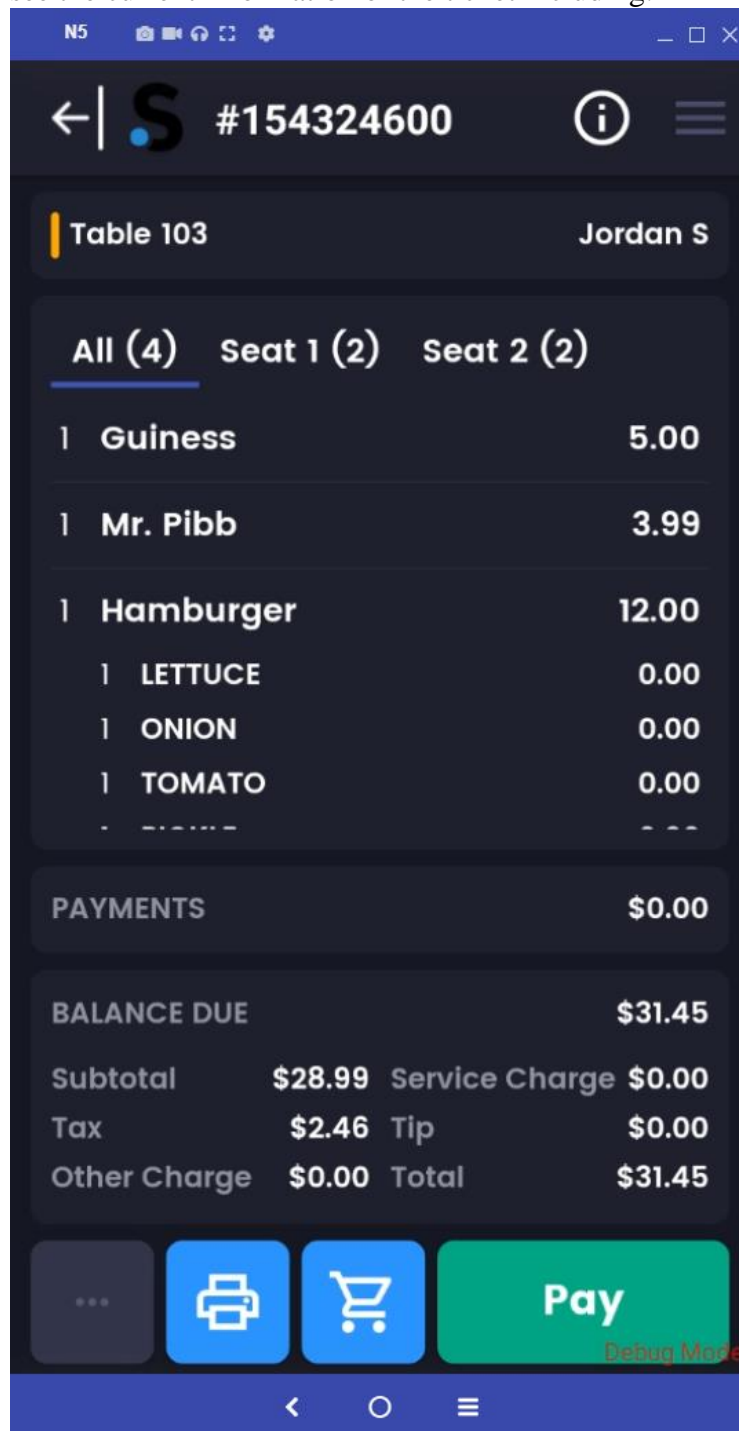


Table Number and Server Name of who started the ticket.

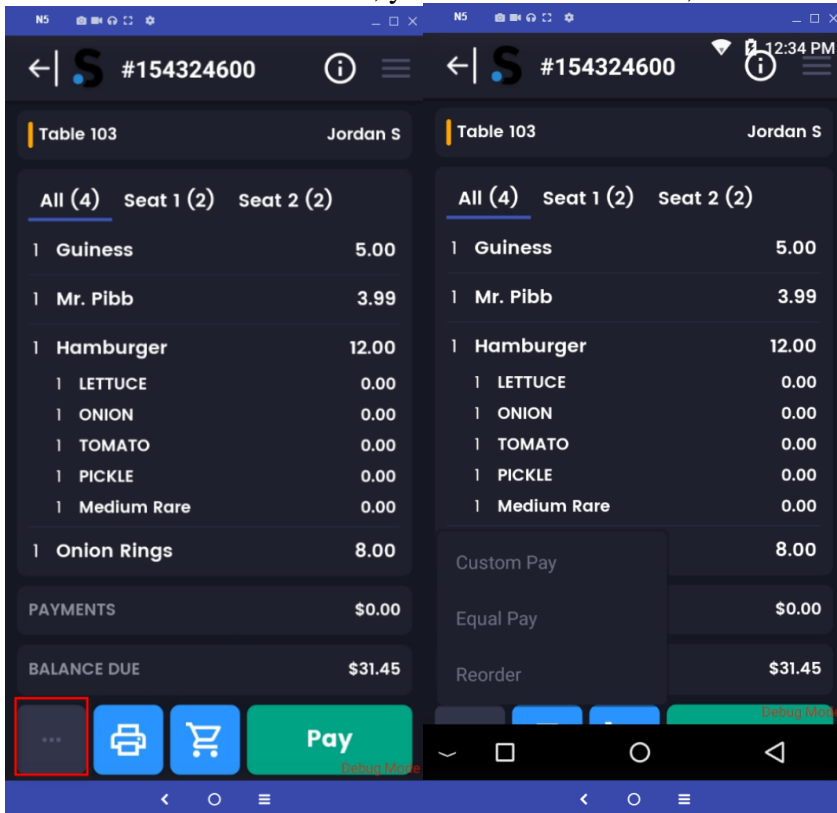
The current items on the ticket including the price and any modifiers on the items.

Any payments currently added to the ticket including cash payments.

The breakdown of the charges including the tax, service charge, and any other charges.

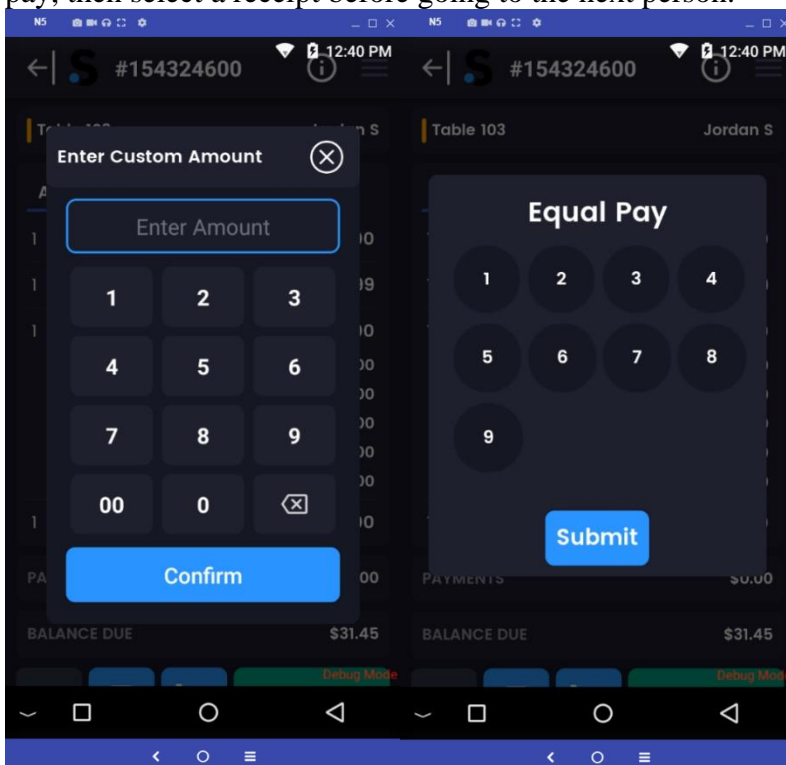
At the bottom of the screen, there are these 4 different buttons, each with a varying function.

In the lower left-hand corner, you have the three dots, which allow you to do the following:

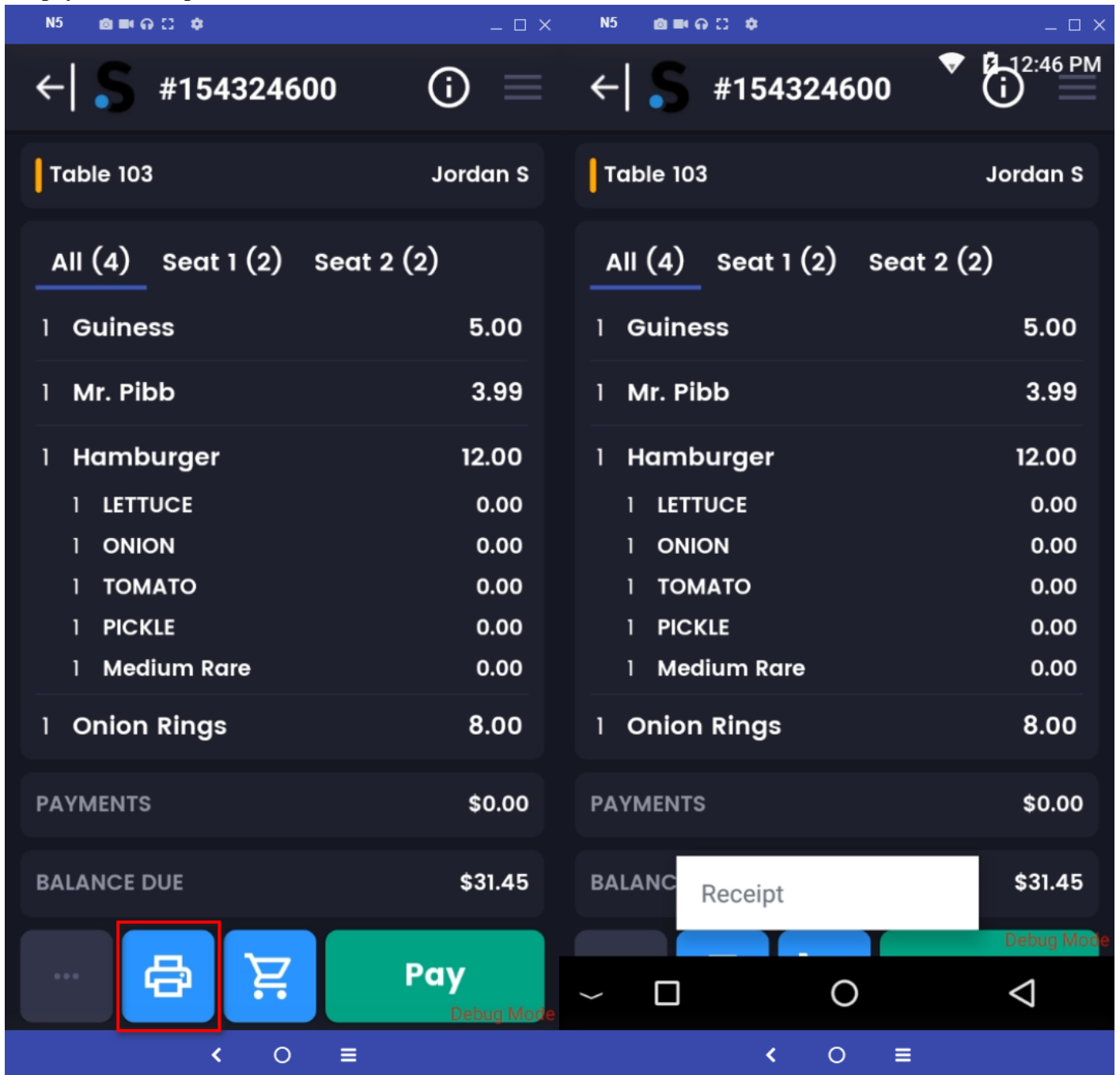


Custom Pay – This allows you to pay for the amount that you put in on the ticket. This is not by paying by items, but just a certain amount on the ticket.

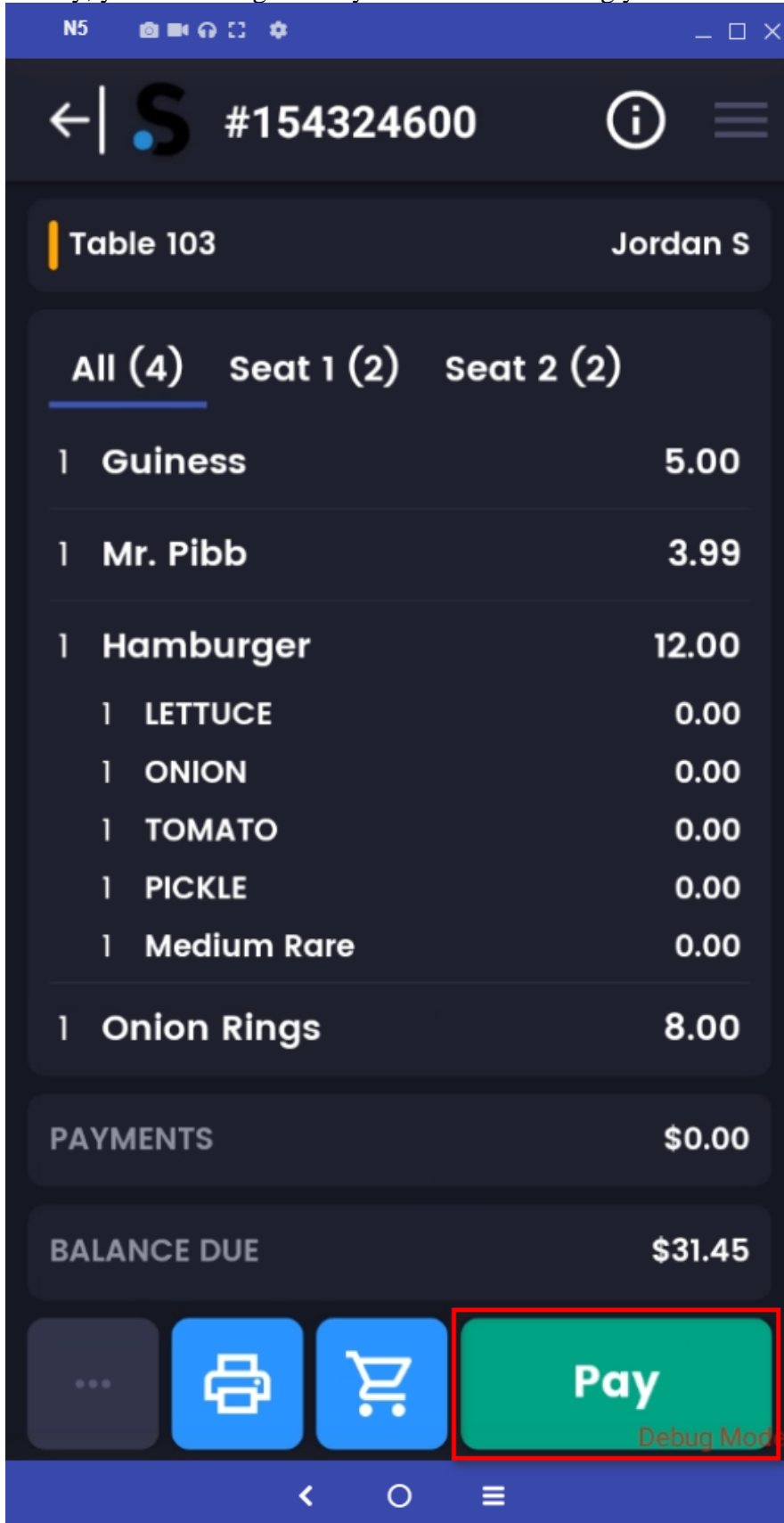
Equal Pay – This is splitting the check between the number of people you select. Each will select a tip, pay, then select a receipt before going to the next person.



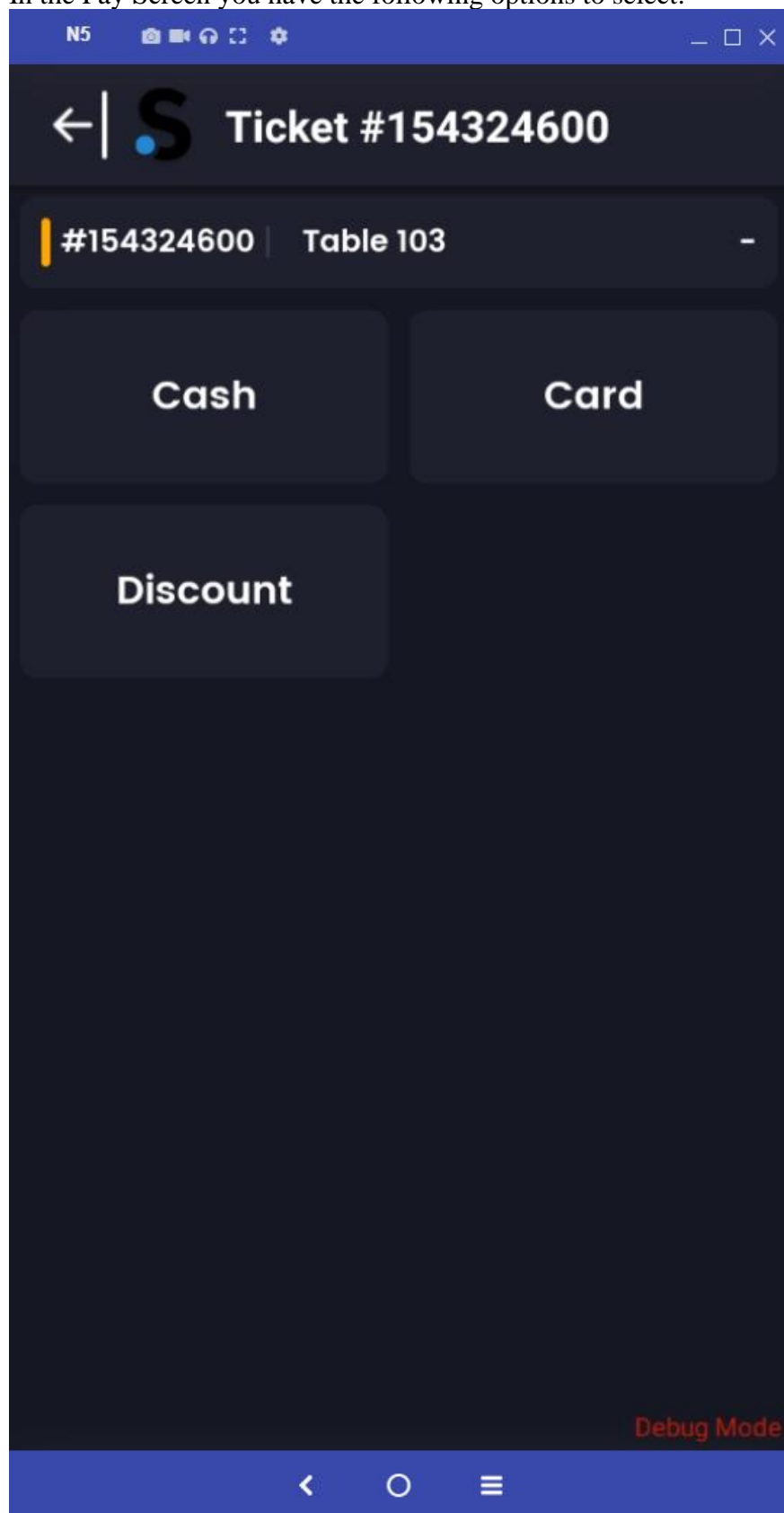
The next option next to the three dots in the lower left-hand corner, is the blue printer button. This allows you to print out the itemized receipt, or once there is a payment, you can reprint, email, or text the payment receipt.



Finally, you have the green Pay button that will bring you to the different payment types you can do.



In the Pay Screen you have the following options to select:



- **Cash** – This will allow you to apply a cash payment to ticket. From here you can select the cash amount from the exact, next dollar up, and varying dollar amounts; or you can manually put in the amount of cash that was handed over. Once ready to pay, you can hit the green Pay at the bottom of screen.

The screenshot shows the SoftPoint mobile app interface for applying a cash payment to a ticket. The top status bar shows 'N5' and various icons. The app header features a back arrow, the SoftPoint logo, and the text 'Ticket #154324600'. Below the header, a summary section displays three values: '\$31.45 Amount', '\$ 31.45 Balance Due', and '0.00 Change Due'. A numeric keypad is visible with buttons for digits 1-9, 0, and '00', along with a backspace icon. To the right of the keypad, four preset amount buttons are shown: '32.00', '35.00', '40.00', and '31.45'. At the bottom, a large green 'Pay' button is highlighted with a red rectangle, with the amount '\$31.45' displayed to its right. Below the button, the text 'Debug Mode' is visible in small red font. The bottom of the screen shows a standard Android navigation bar with back, home, and app drawer icons.

Amount	Balance Due	Change Due
\$31.45	\$ 31.45	0.00

1 2 3 32.00

4 5 6 35.00

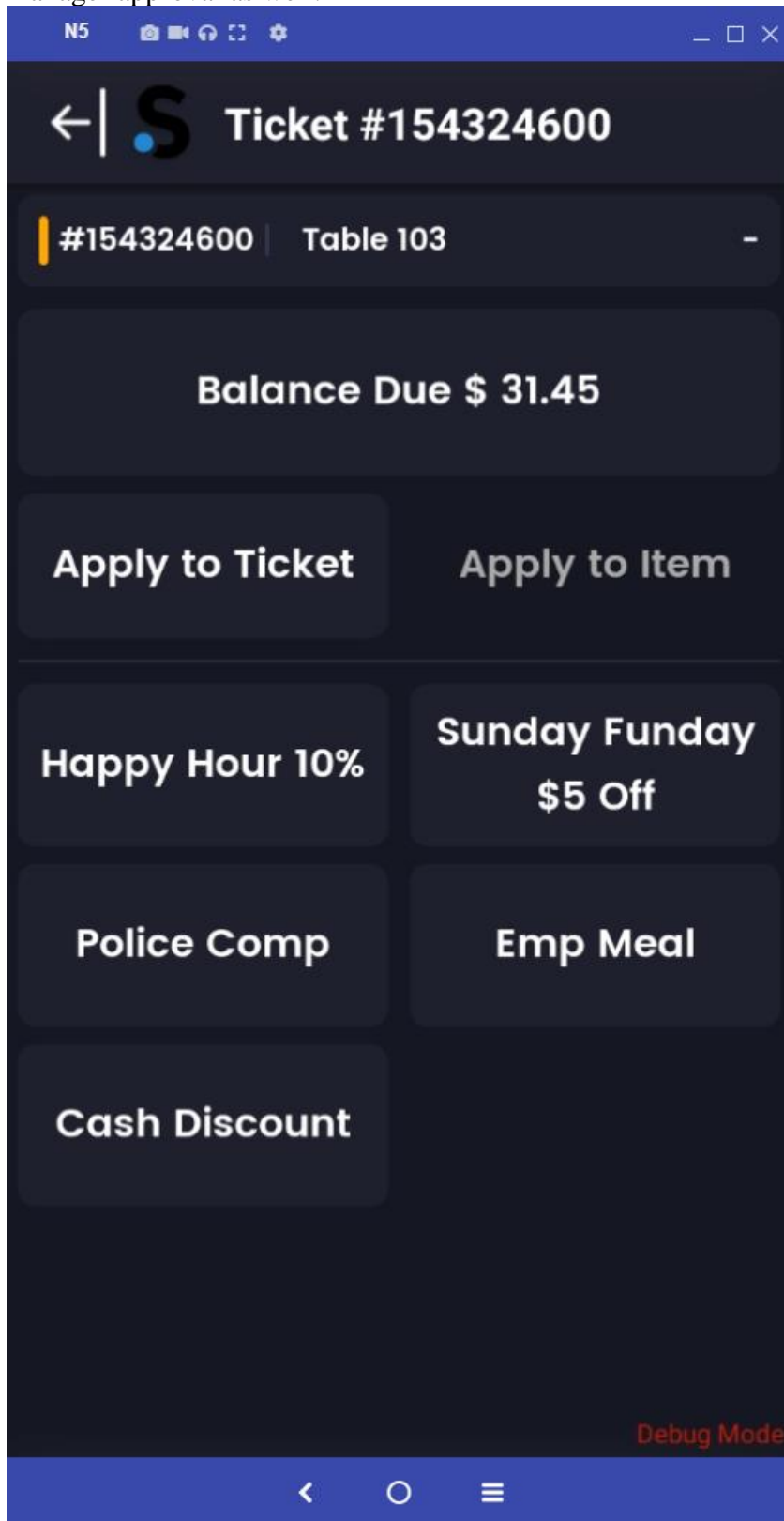
7 8 9 40.00

⌫ 0 00 31.45

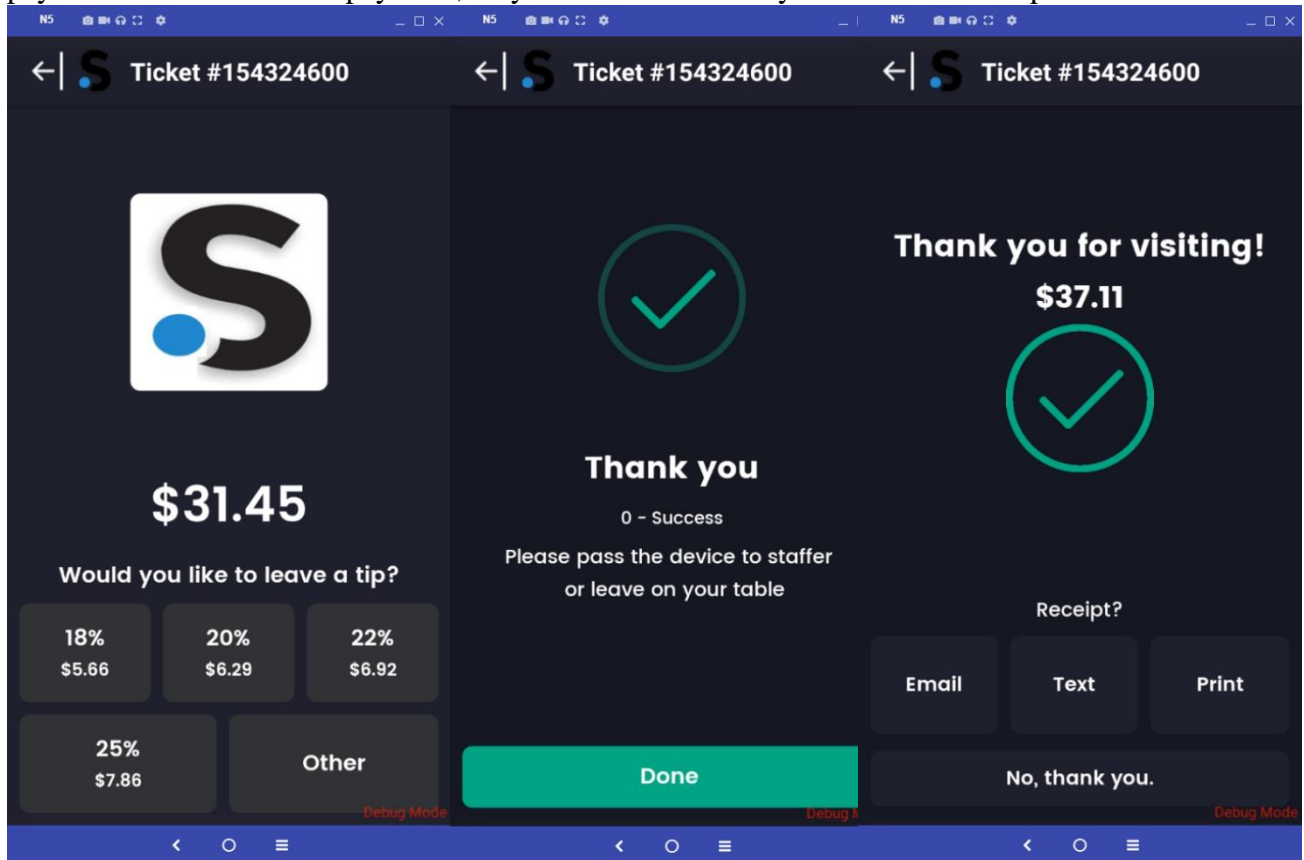
Pay \$31.45

Debug Mode

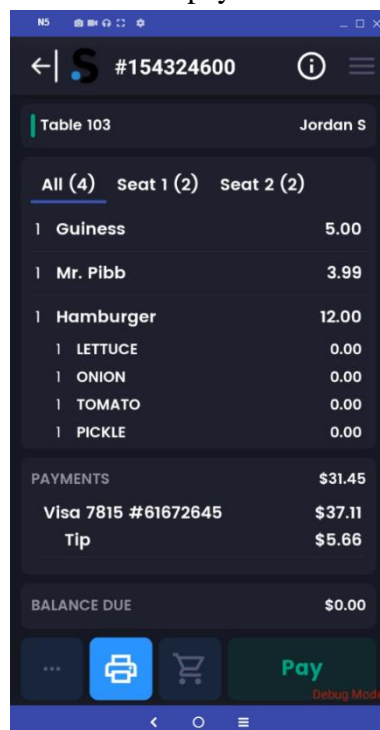
- **Discount** – You can apply a discount from the device to the ticket. This can be done with the discounts that are currently setup on your POS system. The discount can be set to only be done with manager approval as well.



- **Credit** – This will allow you to pay for the whole check with a single credit card. Once you select credit, it will first ask for the tip amount that the customer would like to pay before moving onto the payment screen. After the payment, they will be asked if they would like a receipt.



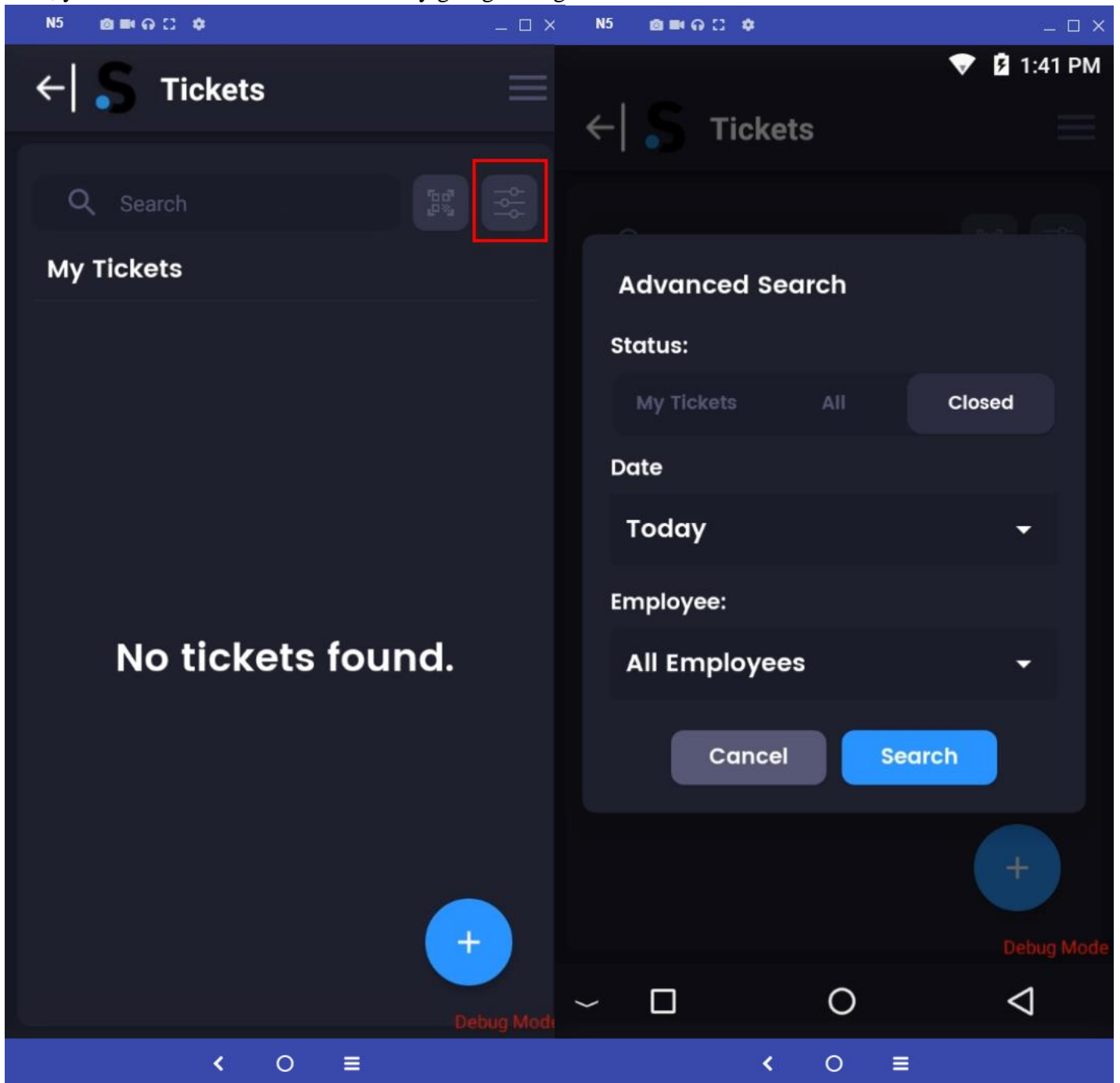
After the payment, you will then see the payment under the Payments section on the ticket details.



Refunds

You can start the refund process by looking for the transaction in 2 different ways.

First, you can search for the transaction by going through the closed tickets.



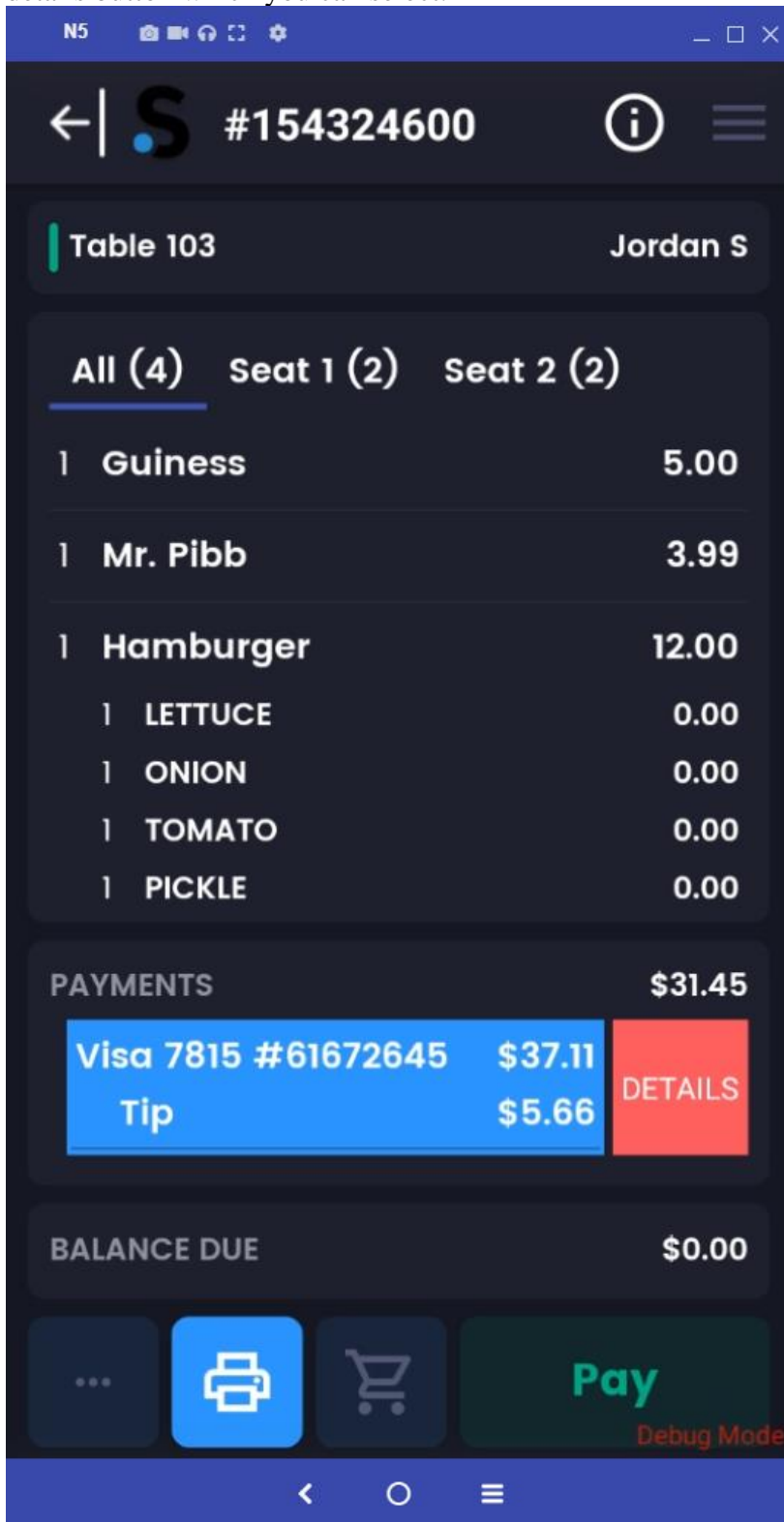
From there you can see the closed tickets for the date you are looking on. Once you select the ticket you will see the ticket details and you can see the card payment under the Payments section.

The screenshot displays the SoftPoint mobile application interface. At the top, there's a navigation bar with a back arrow, the SoftPoint logo, and the word 'Tickets'. Below this, a search bar and filter icons are visible. The main content area is divided into two sections. On the left, under 'My Tickets', there's a list of tickets. One ticket is highlighted with a green bar: Table 103, dated 2025-06-19, for Jordan, with a total of \$37.11. On the right, the details for 'Table 103' are shown, including the server name 'Jordan S'. Below the table name, there are tabs for 'All (4)', 'Seat 1 (2)', and 'Seat 2 (2)'. The 'All (4)' tab is selected, showing a list of items: 1 Guinness (5.00), 1 Mr. Pibb (3.99), 1 Hamburger (12.00), 1 LETTUCE (0.00), 1 ONION (0.00), 1 TOMATO (0.00), and 1 PICKLE (0.00). Below the items, a red box highlights the 'PAYMENTS' section, which shows a total of \$31.45. This section includes a Visa payment of \$37.11 (card number 7815 #61672645) and a tip of \$5.66. Below the payments, the 'BALANCE DUE' is shown as \$0.00. At the bottom, there are icons for a menu, a printer, a shopping cart, and a 'Pay' button. The interface also includes a 'Debug Mode' indicator at the bottom right.

My Tickets	
103 154324600	2025-06-19 Jordan \$37.11

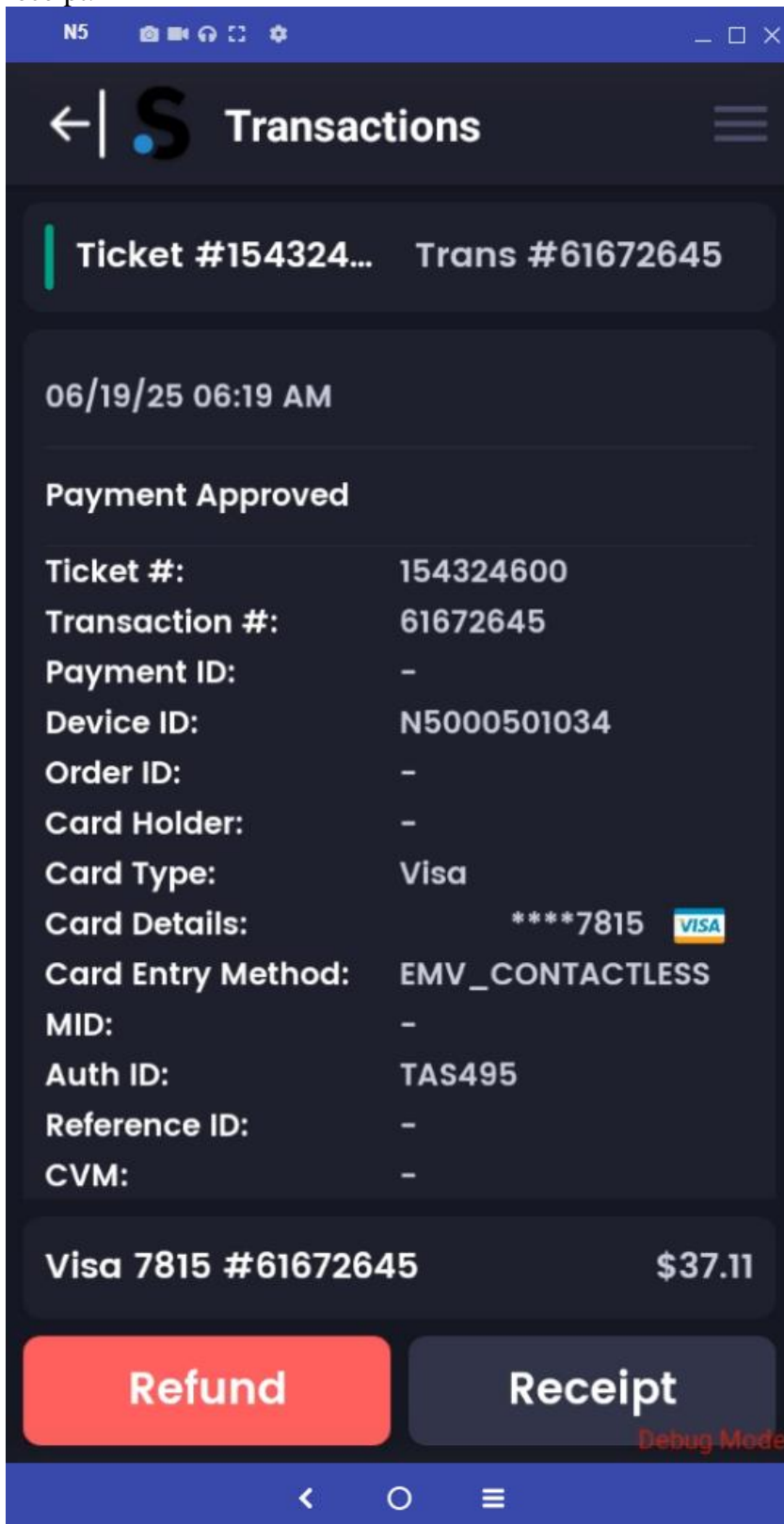
Table 103	
Jordan S	
All (4) Seat 1 (2) Seat 2 (2)	
1 Guinness	5.00
1 Mr. Pibb	3.99
1 Hamburger	12.00
1 LETTUCE	0.00
1 ONION	0.00
1 TOMATO	0.00
1 PICKLE	0.00
PAYMENTS	\$31.45
Visa 7815 #61672645	\$37.11
Tip	\$5.66
BALANCE DUE	\$0.00

You will then tap the payment until it is highlighted blue. Once it is highlighted, you will see a red details button which you can select.

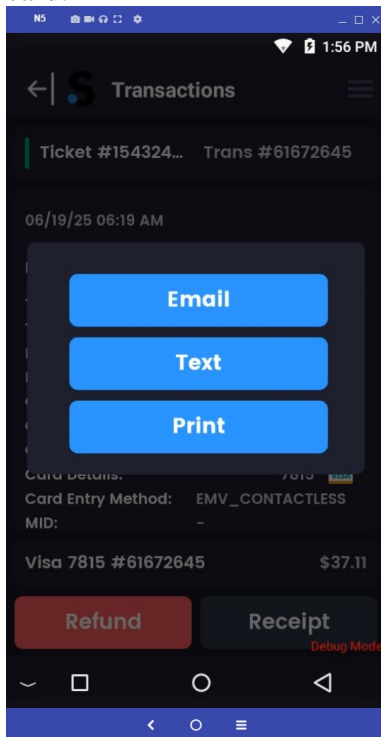


In the details of the transaction you can see several different items.

In here you can see the details of the transaction including how the card was inserted, the last 4 of the card and the time the transaction was taken. At the bottom, you have two separate buttons, refund and receipt.



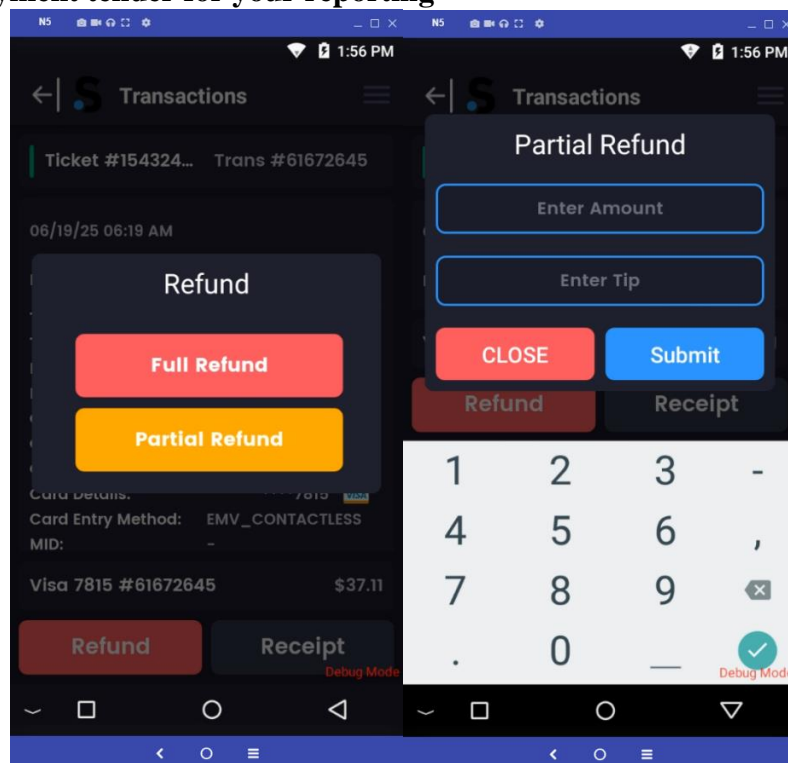
When selecting Receipt, this is where you can choose to reprint, email, or text the payment receipt of the card.



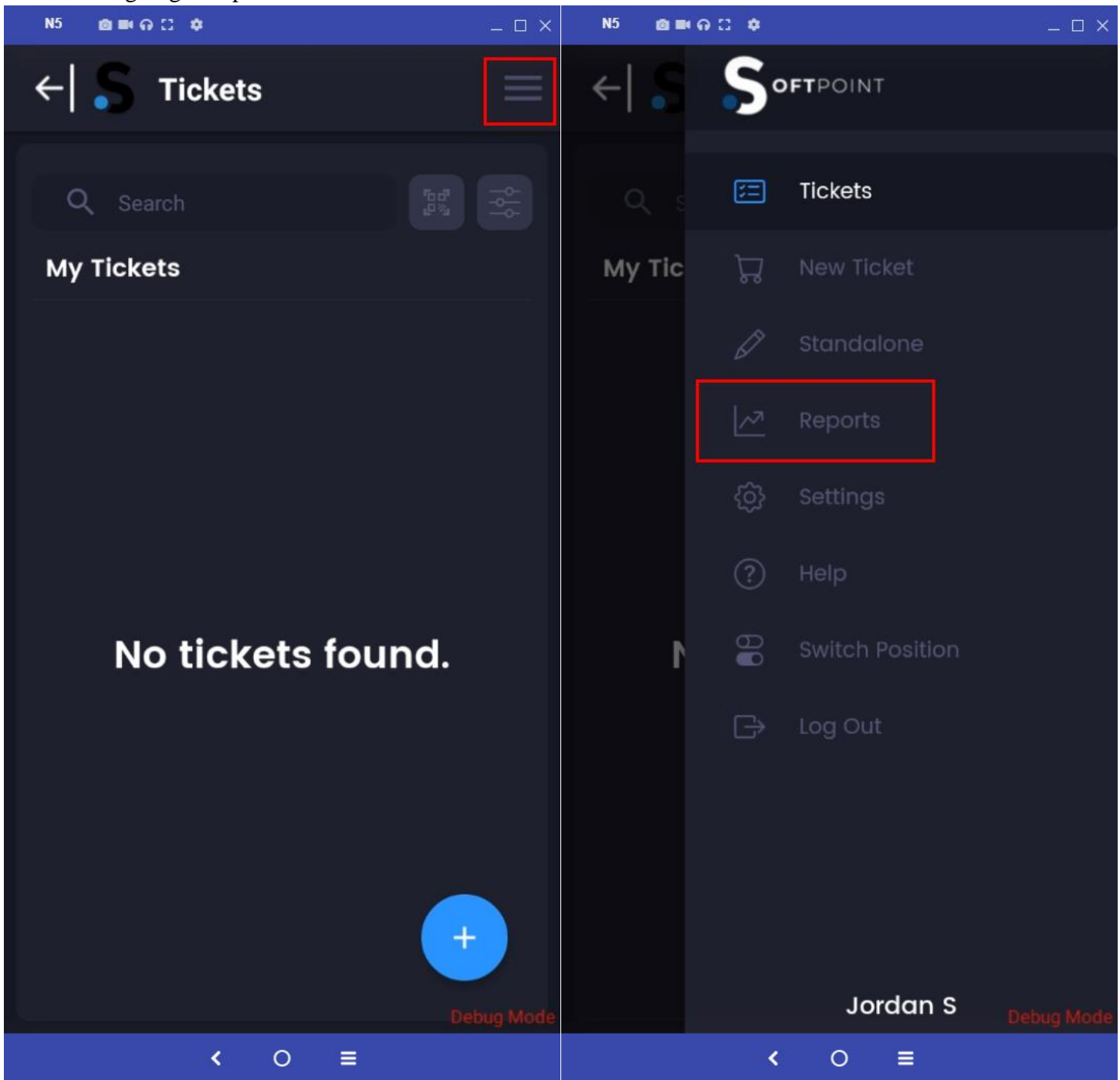
For the Refund, this can only be done by those who have the access to do refunds.

Selecting refund will give you the option to do a full or partial refund. When doing a partial refund, you can type in the amount that you want to refund back.

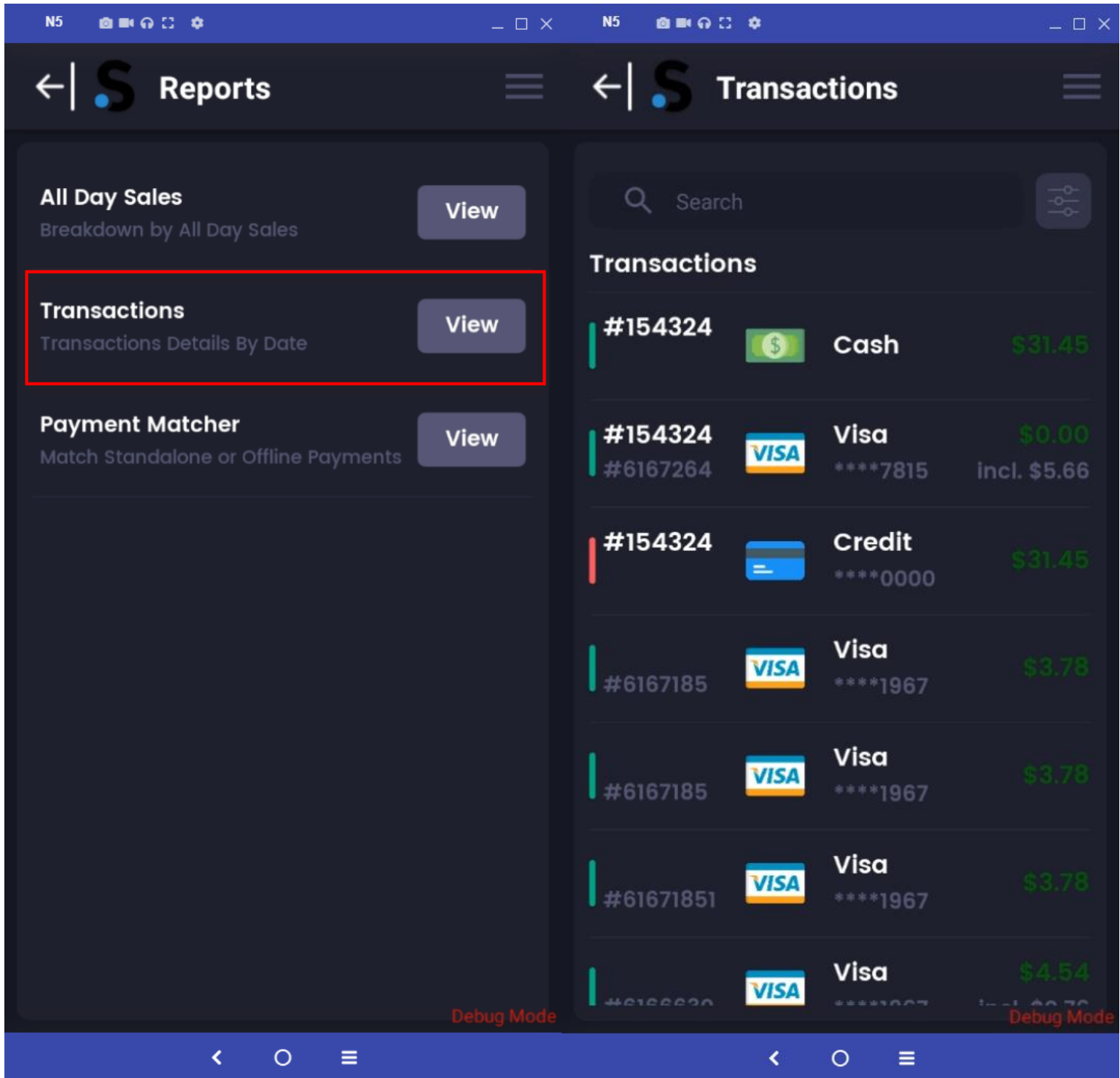
****Once a refund has been done, if you are an integrated site, you will need to reopen the ticket and void the payment tender for your reporting****



The additional way you can find a transaction is by selecting the three lines in the upper right-hand corner and going to reports.



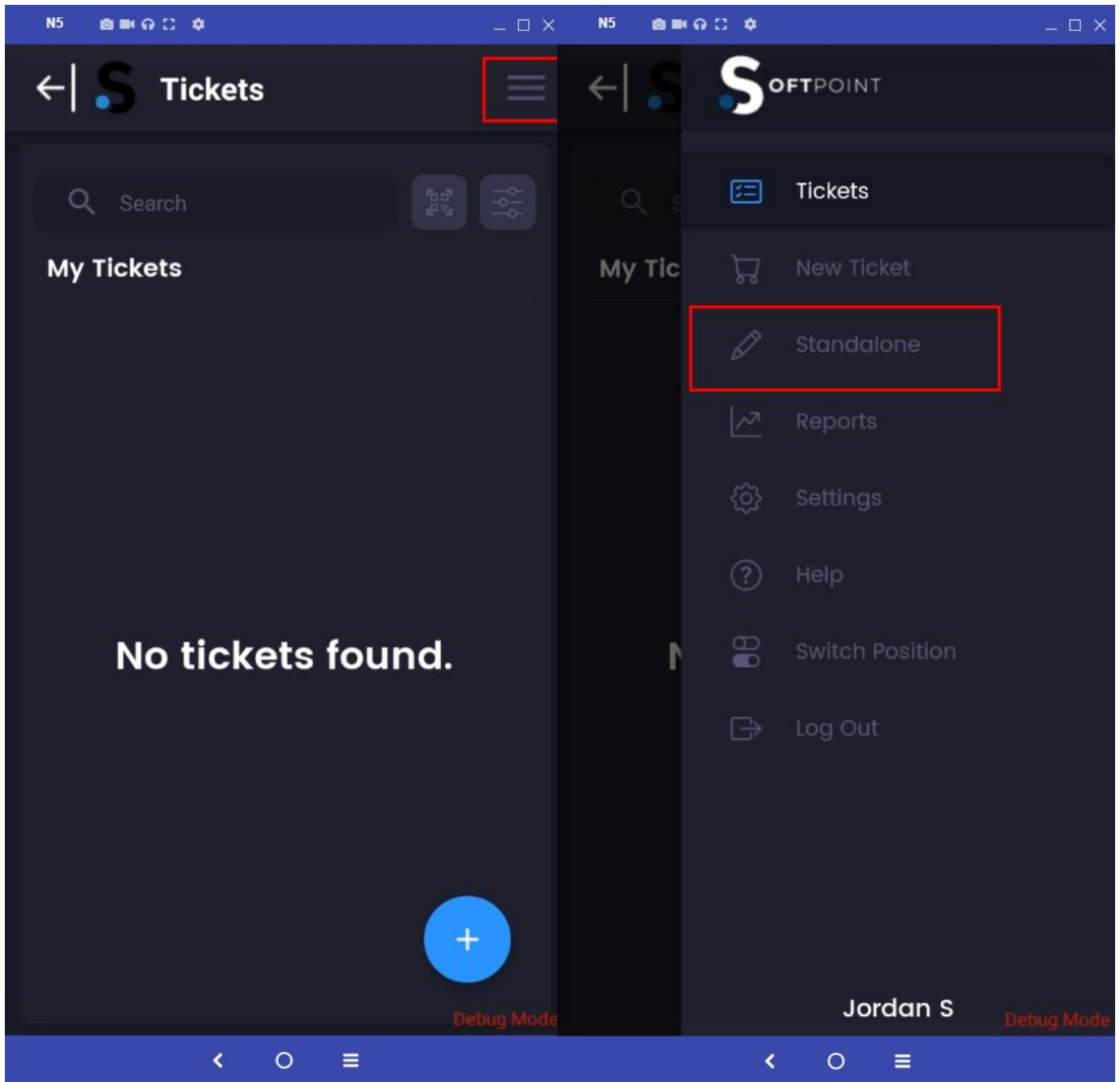
In the reports section, you can select the transaction reports to search for the transaction.



In the transactions report, you can search by the last 4 of the card number, the amount, or the ticket number.

Standalone Payments

You can reach the Standalone Payments by selecting the three lines in the upper right-hand corner and selecting Standalone Payments.



Once you select the Standalone Payment, you will be brought to a screen where you can do the following:

Type in the amount that the client will pay.

Put in the ticket number that the payment can be attached to.

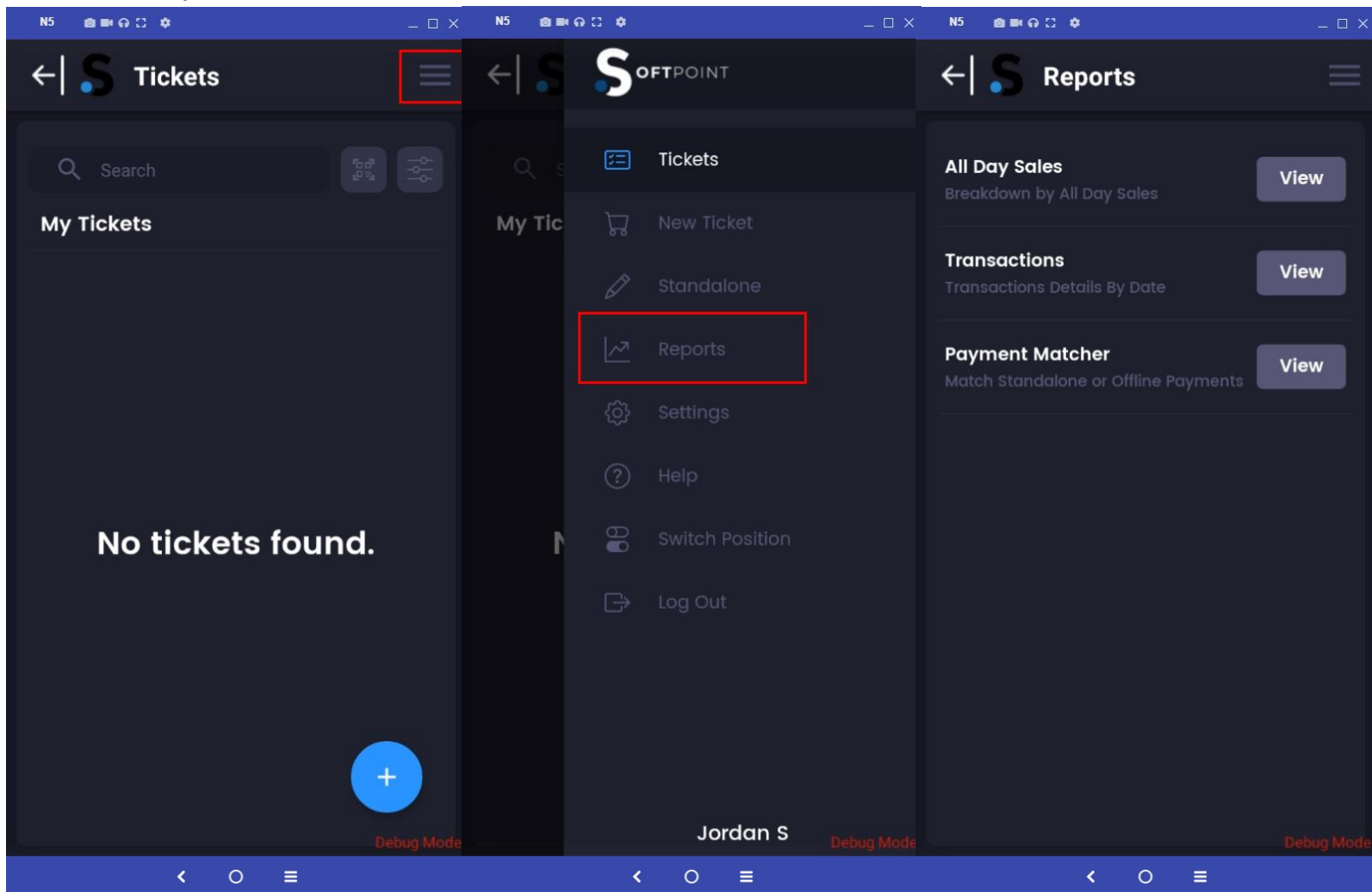
Put in any other notes about the payment.

****Any payments taken on this page will not be attached to a ticket, so it will not send over to the POS system to be closed. This should only be used if your POS system is down or you are on offline payment mode****

Reports

The next section below the Standalone Payments, is the Reports. Under Reports you have the following options:

- **All Day Sales**
- **Transactions**
- **Payment Matcher**



In the **All Day Sales Report**, you can see your own sales and tips for what you are doing throughout the day. If you are a manager, you can see the sales for the whole store. You can also print the All Day Sales report, select which day you want to look at, or choose to filter by Revenue Center or by Employee. (Filter by Employee only available to those who can see all current open tickets)

****If you are a location integrated with an External POS, then this report should be used in conjunction with your POS sales report****

The image displays two screenshots of the 'All Day Sales' report interface. The left screenshot shows the 'SALES AND TAXES SUMMARY' section with the following data:

Category	QTY	NET SALES
Alcohol	0	\$0.00
Food	0	\$12.00
NA Beverage	0	\$0.00
None	0	\$11.99

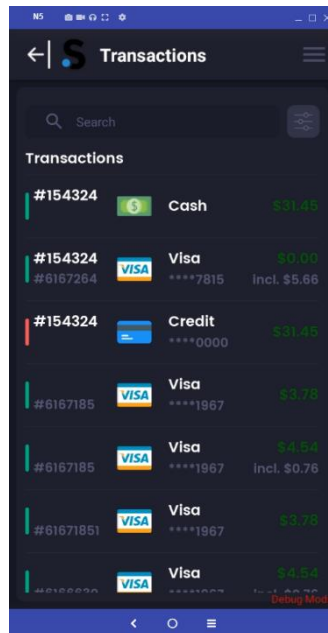
The right screenshot shows the 'Filter Options' overlay with the following settings:

- Revenue Center: All
- Employee: Select Employee

Buttons for 'Cancel' and 'Search' are visible at the bottom of the filter overlay. The interface also includes a 'Print' button and a date selector set to '06/19/2025'.

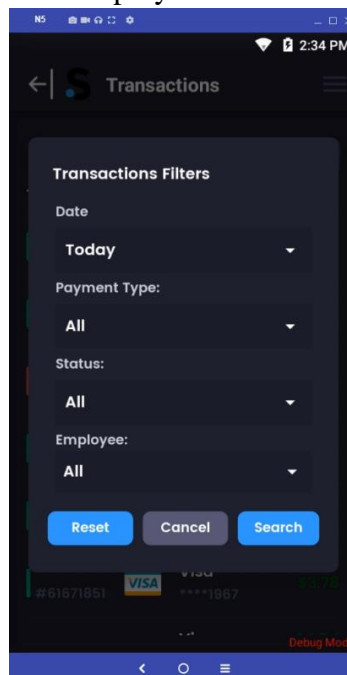
In the **Transactions Report**, you can search for a transaction by using the search by to search by:

- **Last 4 of the Card**
- **Ticket Number**
- **Amount**



There is also an advanced search where you can search by the following:

- **Date** – You can search by a wide range of date including past week, last 30 days, current month, last month, or a custom range
- **Payment Type** – You can search by either the specific card brand or by a gift card
- **Status** – You can search for approved or refunded transactions
- **Employee** – This can only be utilized by employees who see all current open tickets. You can search for a transaction done by a specific employee



Finally, the **Payment Matcher Report**, will allow you to match any **Standalone Payments** or any **Offline Payments** to a ticket. Once the payment has been attached, it will then either close the ticket or send to the External POS to close the ticket if the due amount reaches \$0.00.

The screenshot displays the 'Payment Matcher' application interface, which is split into two main panels: 'Open Tickets' on the left and 'Transactions' on the right. Both panels have a search bar and a date filter set to '06/19/2025'. The 'Open Tickets' panel shows a single ticket entry with a yellow bar on the left, ticket number 100, server ID 154254406, date 2025-06-19, name Jordan, and amount \$8.98. The 'Transactions' panel shows a transaction entry with a green bar on the left, card number #154324, cardholder name #6167264, Visa logo, card number ****7815, and amount \$5.66. A 'Match' button is located at the bottom right of the 'Transactions' panel. Both panels have a 'Debug Mode' indicator at the bottom right. The application is running on a device with a blue header bar and a blue footer bar.

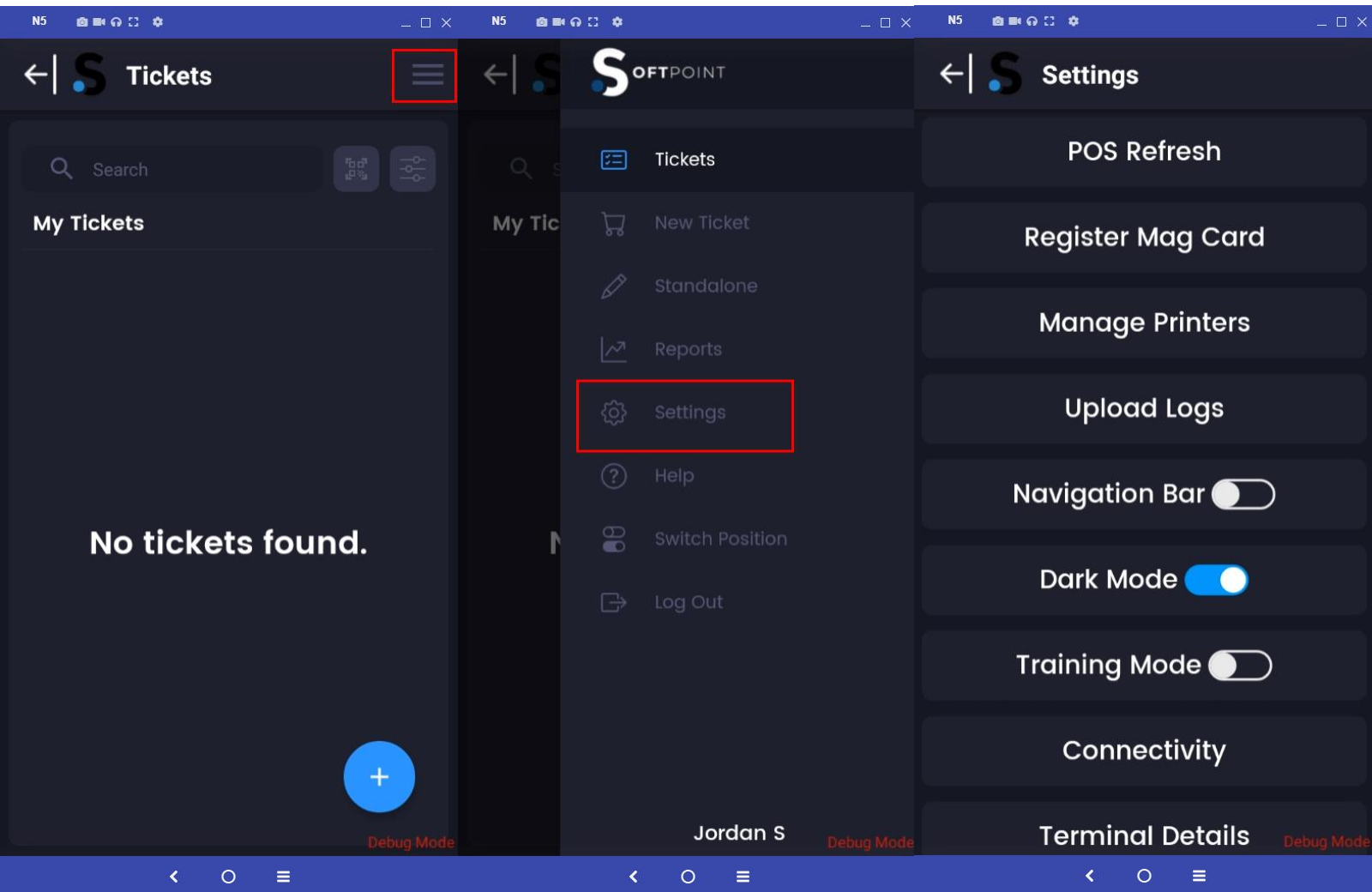
Open Tickets			Transactions		
Search Ti...	06/19/2025		Search	06/19/2025	
100	2025-06-19	\$8.98	#154324	Visa	\$5.66
154254406	Jordan		#6167264	****7815	incl. \$5.66

Both pages will act like their respective pages. In this case the **Open Tickets** will still allow you to search by **Server**, **Table Number/Tab Name**, **Ticket Number**, or **Price**.

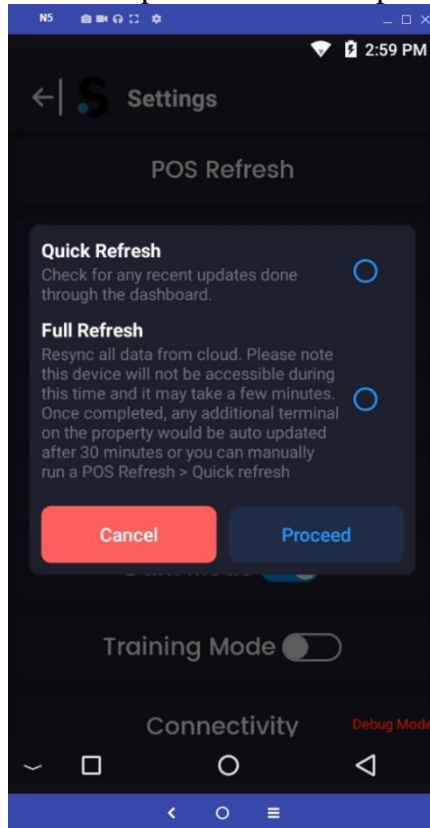
The **Transactions** will also work like the search in the transaction report where you can search by **Last 4 of the Card**, **Ticket Number**, or **Amount**.

Settings

The final section below Reports is the **Settings**. In here you can make several changes for how the device can work as well as several functions.



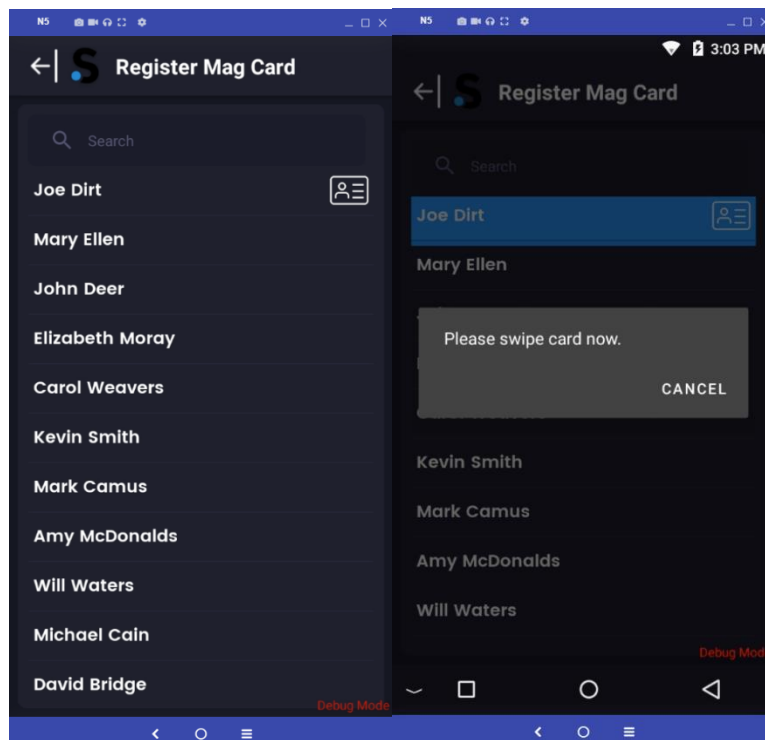
The first option that comes up is **POS Refresh**. In here you have the following two options:



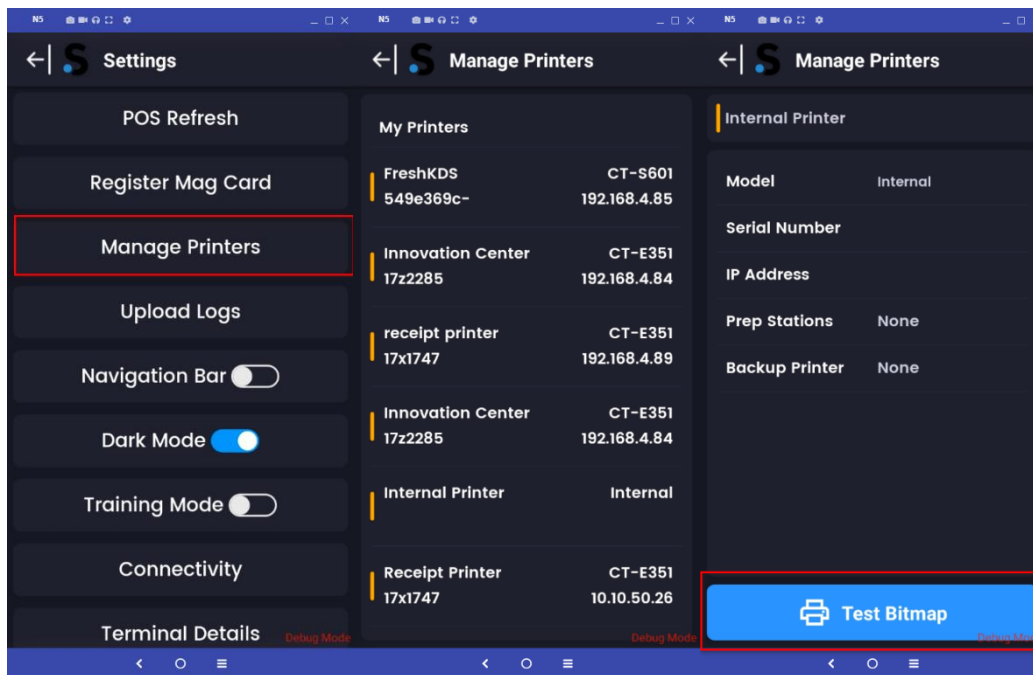
Quick Refresh – This is the option to select if you are bringing in any changes made on the SoftPoint Dashboard that you want to take effect immediately. I.e. Tip Percentage Changes or Employee Positions Accesses. ****Any changes made on the SoftPoint Dashboard will be pushed down to the device automatically after 30 minutes****

Full Refresh – This option when selected, will reach out the External POS and update the SoftPoint Dashboard and the specific device, with any changes made on the External POS. I.e. New Employees or Menu Changes. Afterwards, you can wait the 30 minutes or perform a manual Quick Refresh on the other devices.

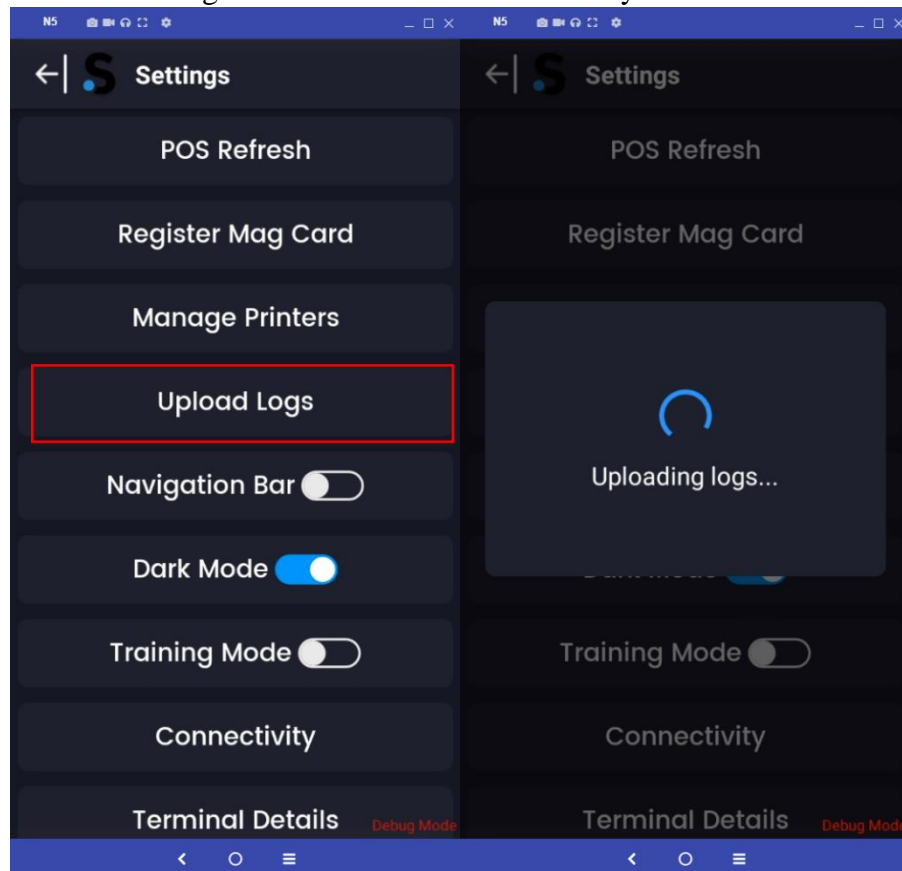
The option below POS Refresh is **Register Mag Card**. If you have the permission access, you can then go into here and select an employee to pair them with a mag card. Once paired, the employee will then swipe the mag card to login instead of putting in their pin number. You can also go in here to update any paired mag cards.



Under Register Mag Card is **Manage Printers**. In Manage Printers you can run a test print for any printers connected to your location as well as the built-in printer on any devices.

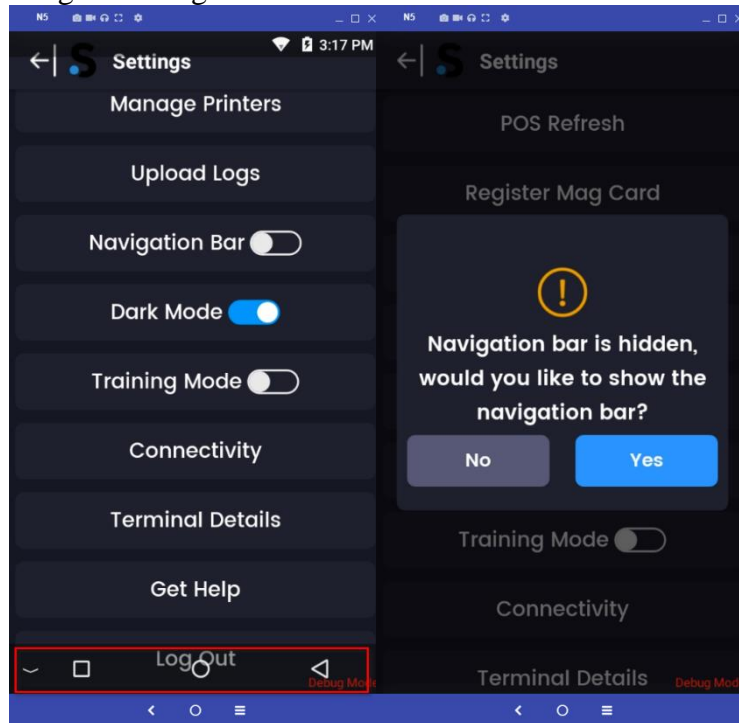


Below Manage Printer is **Upload Logs**. When selecting Upload logs, it will upload the device specific logs over to SoftPoint. The logs can then be looked into for any issues the location is having.

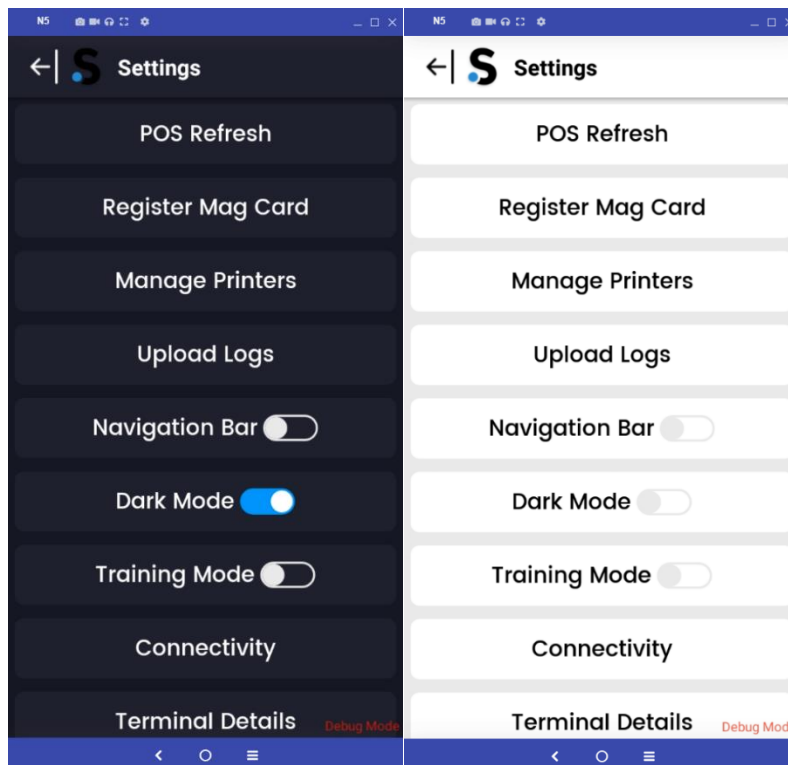


The next several options all have to do with how the device looks.

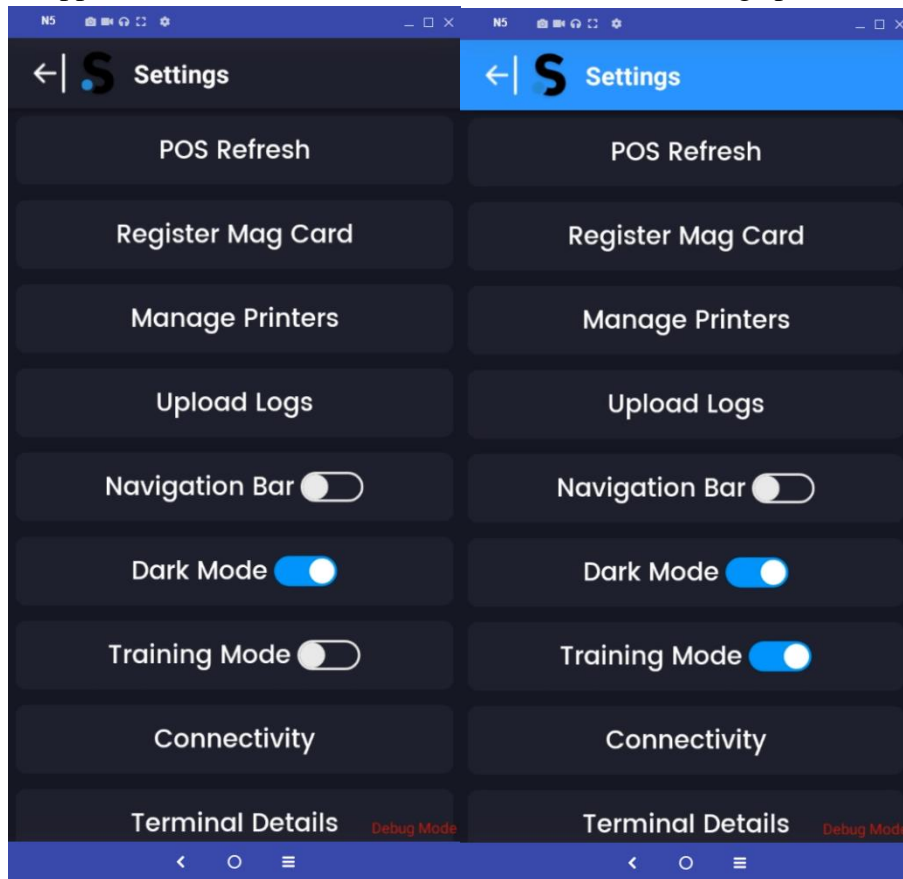
Navigation Bar – This option is about letting the user being able to jump out of the payment or SoftPoint application by selecting the home screen button. This is turned off by default and can be turned on by selecting the Navigation Bar.



Dark Mode – This will change what color mode the devices are on. They can default to the mode selected on the SoftPoint Dashboard. The terminals can be changed individually on a terminal by terminal basis.



Training Mode – This is a pared down version of the application where the user will not be able to make payments at all. This is set for a new user to learn how the application works and get used to navigating the application. This can be turned on and off in the settings per terminal.



Support

If you are having any issues, please reach out to the SoftPoint Support with the following information:

- All relevant information about problem, including error messages and screen shots if possible.
- If the problem is replicable and consistent.
- What version of the software you are on.
- If there have been any changes made to the BOH or WiFi network.

If it is a more urgent issue, please reach out to our SoftPoint Technical Support phone number: **+1 (480) 745-3049 ext. 2.**

****In the event our technical support number is busy assisting other customer and miss your call, leave a VOICEMAIL message as they will prioritize calling back Voicemails once off calls****

If the issue is not as urgent, please reach out to our SoftPoint Support email support@softpoint.io with the following information:

- Location Name and Location ID
- Description of the issue

Knowledge Base

If you have any questions or would like to look up any videos or articles on anything shown in the document please go to our Knowledge Base:

<https://softpointio.zendesk.com/hc/en-us>

Here are also some videos that go over what was discussed earlier:

Handheld Order & Pay:

<https://www.loom.com/share/b004ca88d67e40b3bf1b5caa99e5f057?sid=44284fda-4a61-4b8b-b33e-a7d751f7f794>

How to Perform a Refund:

<https://www.loom.com/share/b6d8bea43048492782b1ad860fdfb43c?sid=45566ee1-f262-43ba-a422-03a9272d73ee>

Common POS Errors:

<https://www.loom.com/share/a955846804304068bf7b22282b7d478d?sid=7e5902ef-a995-4989-a5e7-4d6fala2c9cc>



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