Your guide to the PayAnywhere app.

Version 5.5

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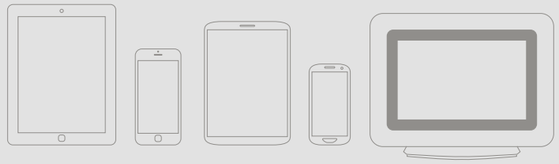
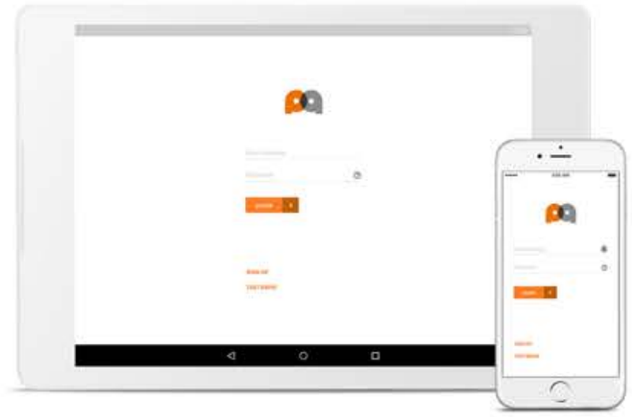
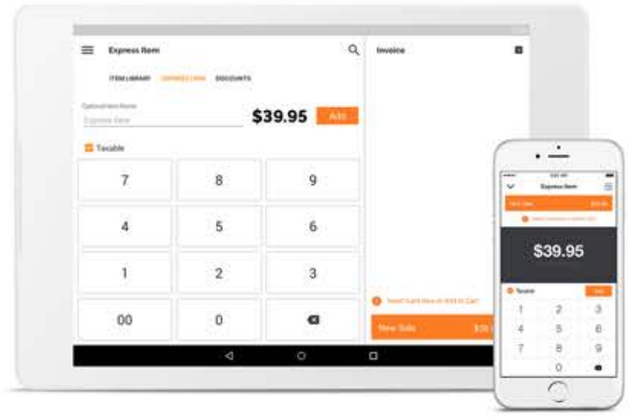


PayAnywhere is compatible with iPad, iPhone, Android phones and tablets, and PayAnywhere Storefront.

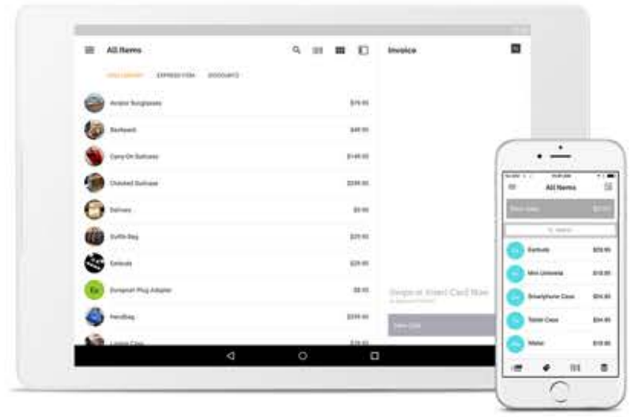
The basics.



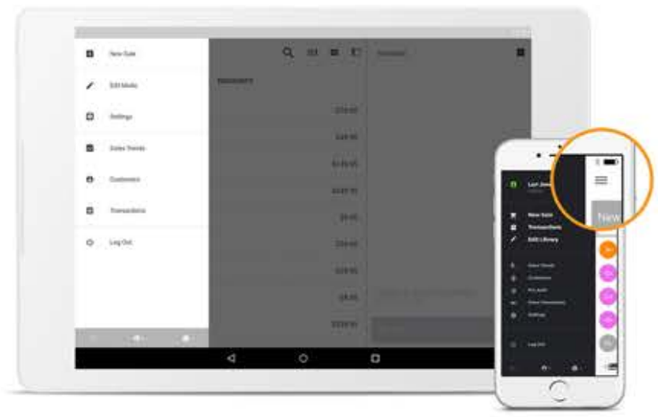
Login with the email and password you created when signing up for PayAnywhere, then enter the passcode you receive via SMS text. Reset your password at inside.payanywhere.com.



Once logged in, if you are a first time user or do not have items loaded, you'll default to Terminal theme.

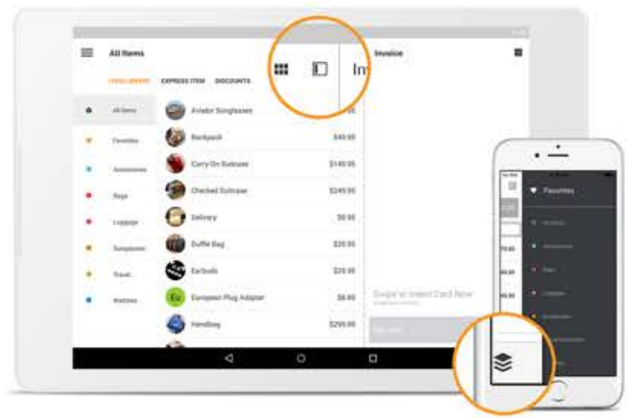


If you do have items loaded, you'll land on Items.



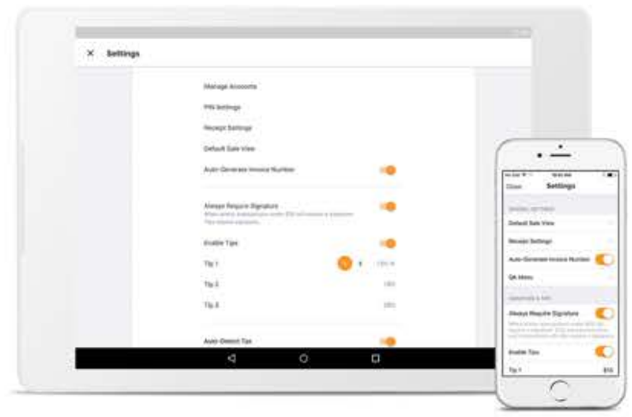
Navigation menu.

Tap on the top left hamburger icon to access the Navigation Menu. You can start a new sale, view transactions, edit items, view reporting, and access Settings.



Filter menu.

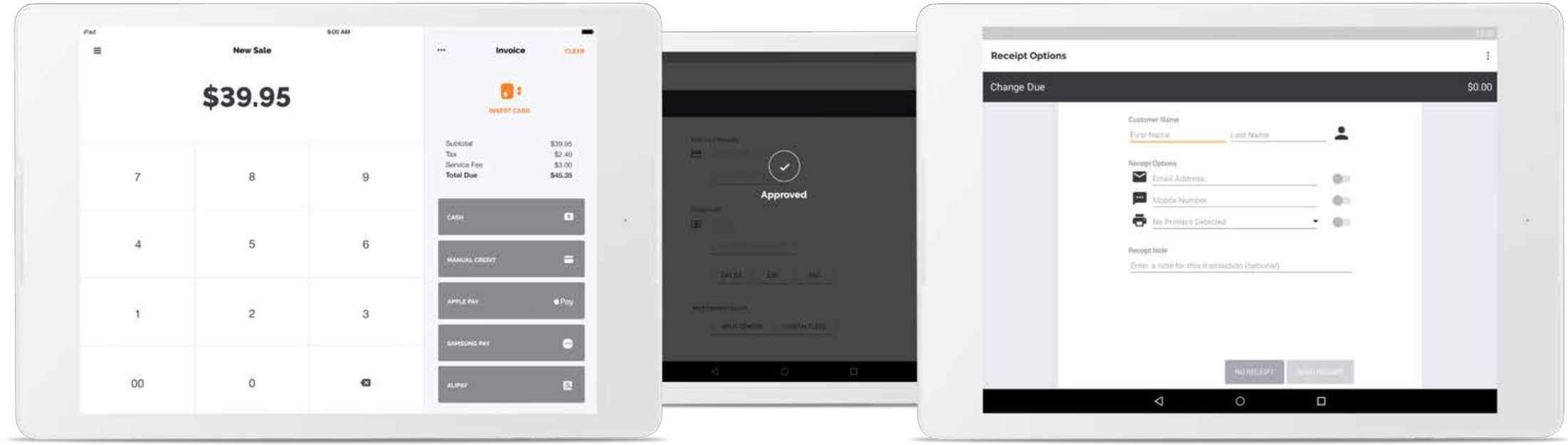
While on the Sell screen, tap on the category icon for the Filter Menu. You can access Categories, Favorites, and Discounts.



Settings.

Under the Navigation menu, tap Settings. You can edit tax and tips, manage multiple accounts, connect devices, customize receipts, enable customer feedback, and more.

Terminal theme.



1. Enter amount.

Enter transaction amount and insert card, or select one of the other payment methods.

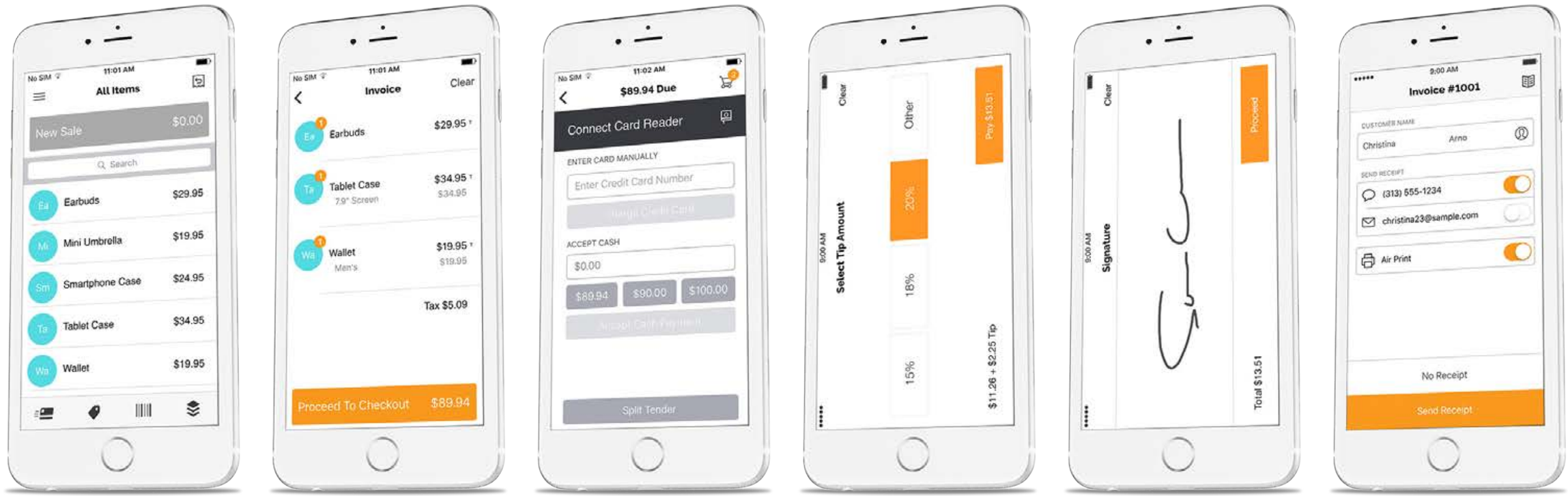
2. Process card.

There's no need to tap "Proceed to Checkout". Just swipe or insert the card right from the New Sale screen and skip the checkout process.

3. Receipt share.

Users are directed to the Receipt Share screen as normal.

Selling items.



1. Add items.

Tap items to add them to the cart.

2. View cart.

(Optional) Tap the Cart button to see the current invoice. Edit or delete items, or proceed to checkout.

3. Checkout.

(Optional) Swipe, insert, or select a different method of payment.

4. Tip.

(Optional) Hand your device to your customer to allow for tips.

5. Signature.

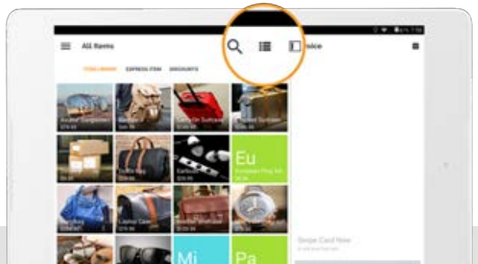
Once your customer signs, they can hand the device back to you to complete the sale.

6. Send receipt.

Assign a customer to a transaction, add a note, and generate a receipt via print, email, or text.

TIP

If you are not using a PayAnywhere 3-in-1 Bluetooth Credit Card Reader, you can combine the Tip screen with the Signature screen. Go to Settings → Enable Tips → Combine Tip & Signature Screens.



On a tablet, you can toggle between list and grid view.

Invoices.

Quickly and easily send your customers invoices within the PayAnywhere app. Invoices are considered keyed transactions.

1.
From the Checkout screen, select Send as Invoices.

2.
Enter Invoice and Customer information and choose a Due Date.

3.
If it's a recurring invoice, enable Create Recurring Series and choose the start date, end date, and when it should repeat.

4.
Tap SEND to send the invoice to your customer.

5.
Your customer will receive the invoice via email and click the link provided to submit a payment.

6.
After the customer submits their payment, they will receive a receipt.



TIP

You can manage your invoices from PayAnywhere Inside under Business → Invoices.

Scanning barcodes.

Using a Bluetooth scanner.





1. Pair device.

Go to Settings → Barcode Scanners and enable your Socket Mobile 7Ci.

2. Scan items.

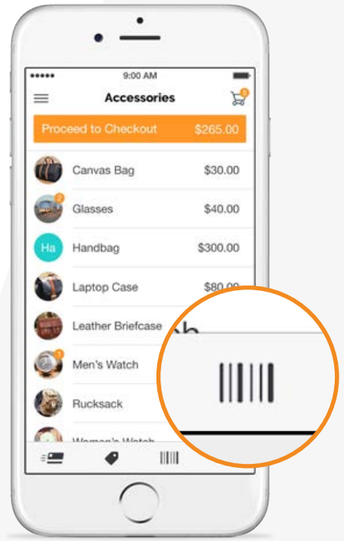
Scan a barcode to add items to a sale or create items in Edit Mode.

TIP

You can see all your connected devices, including barcode scanners, from the bottom section of the main menu.



Using your device camera.



1. Tap icon.

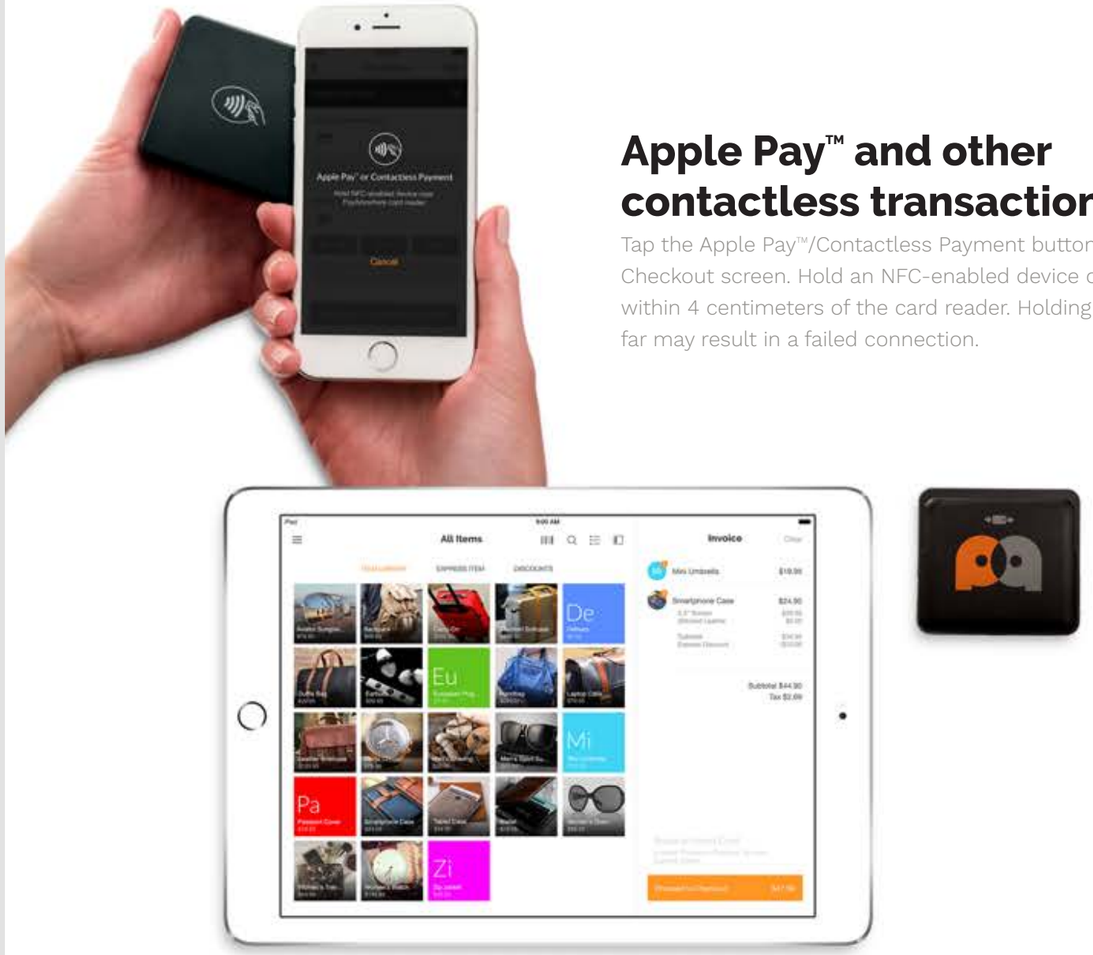
Locate the barcode icon on the Sell screen to activate your camera.



2. Snap!

Recognized items will be automatically added to the cart. Unrecognized items can be added to your item library.

Payment methods.



Apple Pay™ and other contactless transactions.

Tap the Apple Pay™/Contactless Payment button on the Checkout screen. Hold an NFC-enabled device or credit card within 4 centimeters of the card reader. Holding a device too far may result in a failed connection.



EMV transactions.

Insert the end of the credit card with the electronic chip into the card reader so that the indicator lights and electronic chip are facing towards you.

On PayAnywhere Storefront, insert the card so the chip is facing away from you.

Alipay.

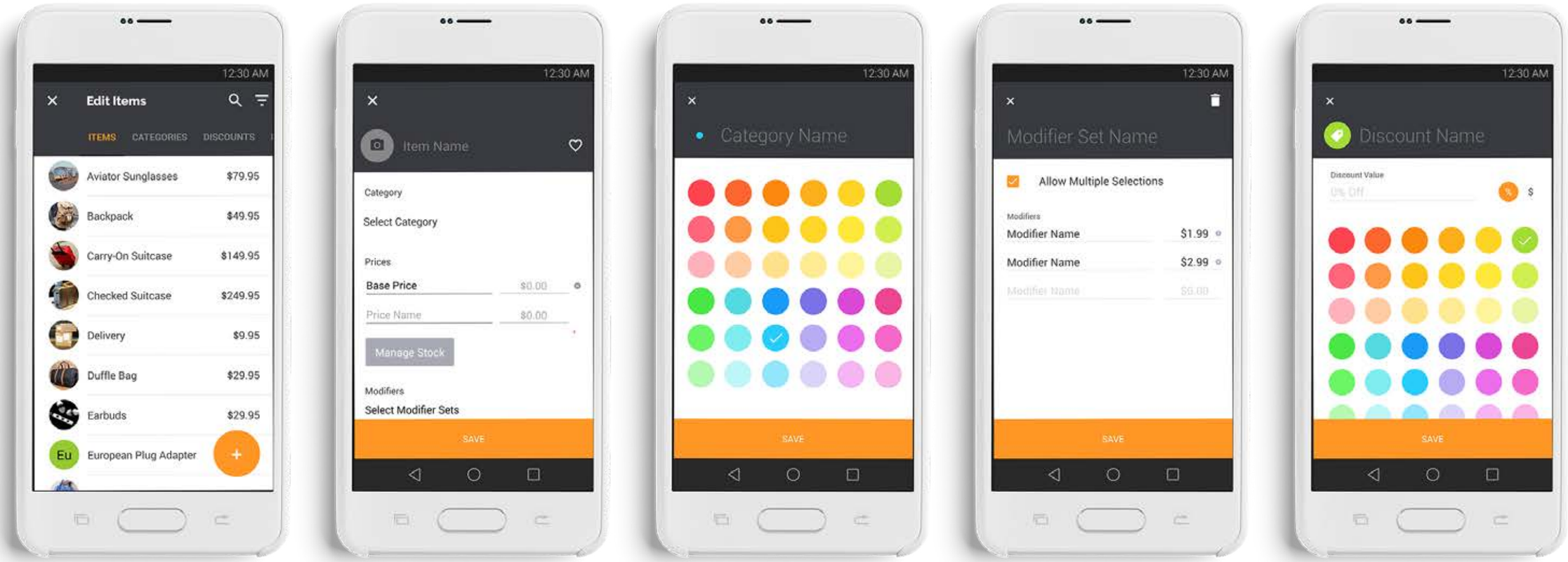
On the Checkout screen, tap Other Payment Methods, then select Alipay. A menu will appear with the option to Scan with Camera, Scan with Bluetooth Scanner, or Type Barcode. Select the method you prefer and follow the instructions on the next screen.



TIP

For increased security, chip-enabled cards must be inserted.

Build a library.



View products.

Tap the top left hamburger icon to view the Navigation Menu, select “Edit Mode”. Here you can tab through items, categories, discounts and modifiers.

Create items.

Assign item images, multiple prices, barcode numbers, tax, and modifiers.

Categories

Create color-coded groups to organize your items.

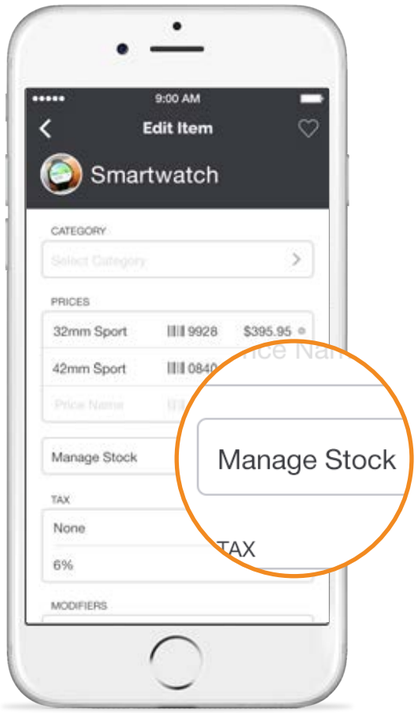
Modifiers.

Create sets of options that can be assigned to items and selected at time of sale.

Discounts.

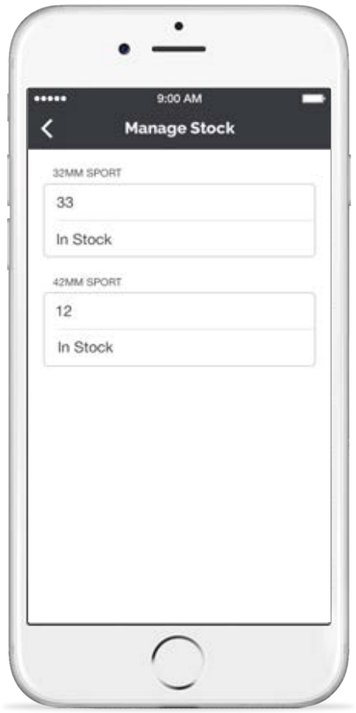
Create color-coded dollar or percentage-based discounts.

Manage stock.



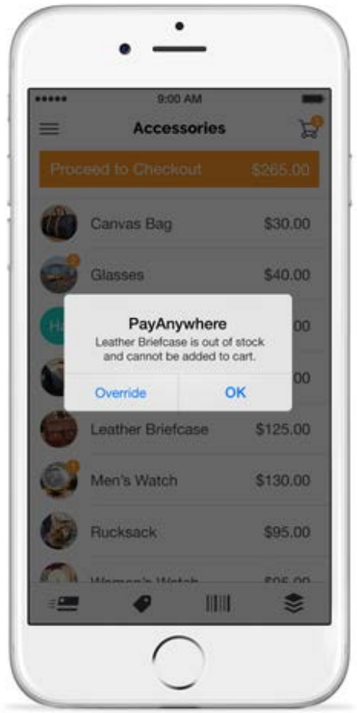
1. Manage stock.

Click the Manage Stock button on any item in Edit Mode.



2. Track item.

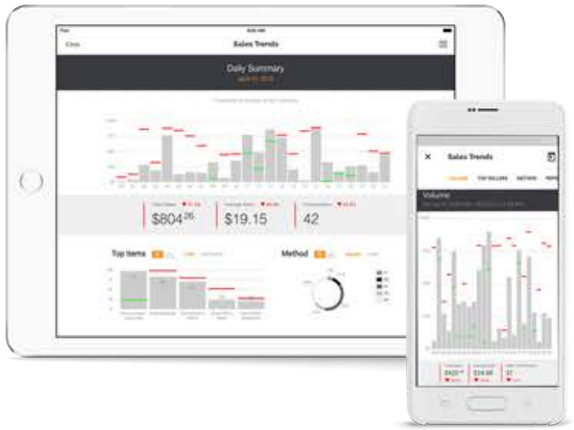
Enter the quantity on hand for each item.



3. Receive alerts.

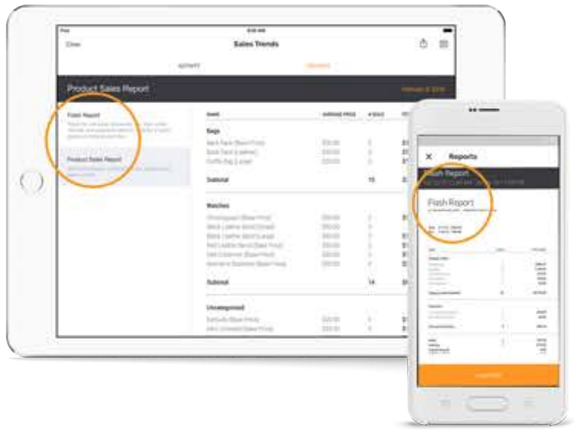
Employees will be notified when an item is out of stock.

Run your business.



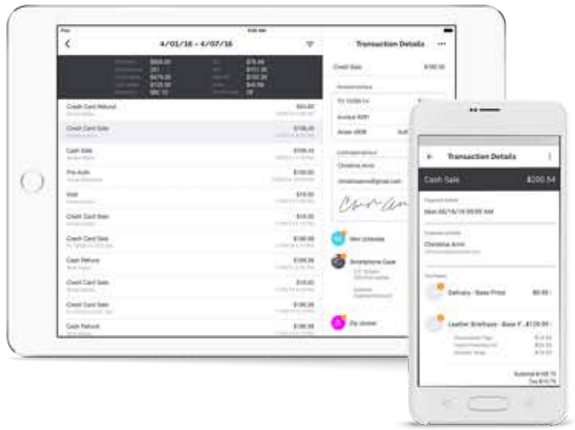
Sales Trends

Shows you sales volume, top sellers, and payment methods.



Reporting

Tap the “Reports” tab to view a list of available reports.



Transactions

This is a running list of transactions by date. You can generate reports, view transaction detail, and process refunds and voids from here.



Customers

View and search through your customer base and view a customer’s transactions.

Still have questions?

Help guide and video tutorials.

payanywhere.com/faq

Customer service and technical support.

Monday - Friday, 8am - 9pm ET
Saturday-Sunday, 8am - 6pm ET
1.877.387.5640
custservice@payanywhere.com

Be social with us.

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