? App Overview: Key Screens & Workflows

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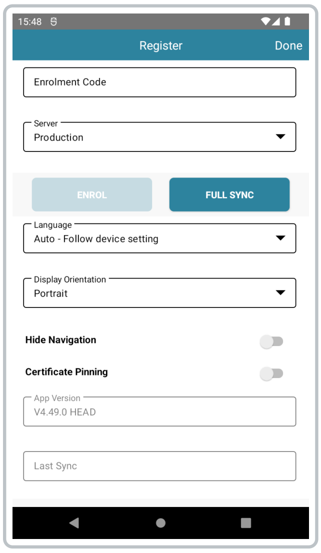
Your solution includes several key screens designed to make setup, sales, and reporting as simple as possible. This quick tour introduces the main screens and what you can do in each one.

Settings Screen

The **Settings** screen is the first screen you'll see when launching the app for the first time.



Here, you can:

- Enter your enrolment code (provided by your Solution Provider) to link the terminal to your account.
- Change the **application language**.
- Check the **app version**.
- Run a **Full Sync** to re-download all settings.

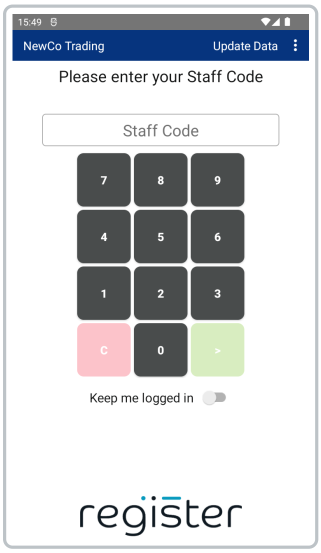
To access Settings later: From the **Login** screen, tap the **kebab menu (?)** in the top right, then tap **Settings**.

Learn more:

- ? Learn how to enroll your device

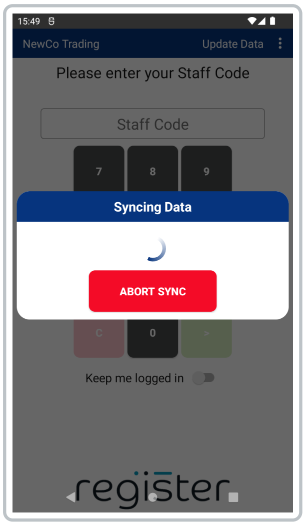
? Login Screen

This is where staff members enter their Staff Code to access the system.

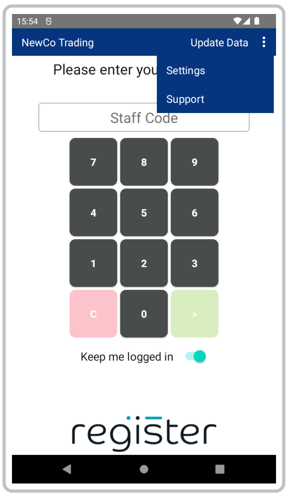


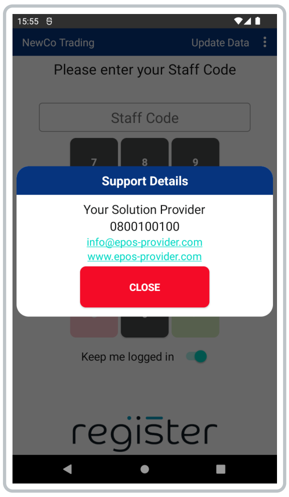
Also available from the login screen:

- **Update Data** – Syncs with the back office to download configuration changes and upload offline transactions.



- Access to the **kebab menu (⋮)** for:
    - **Settings**
    - **Support Contact Details**





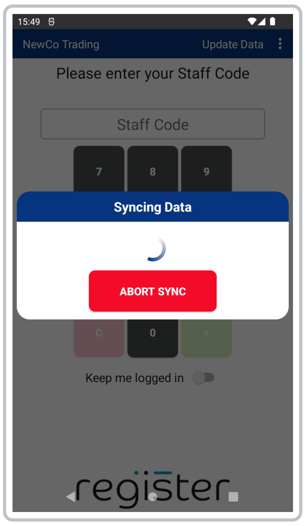
Learn more:

- How to log in
- How to view support contact details

Update Data

Tapping the **Update Data** button:

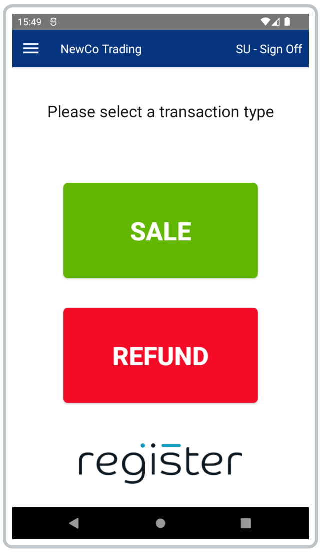
- Downloads the latest settings and updates from the **Web Portal**.
- Uploads any **offline transactions** stored on the device.



> **Top Tip:**
> Before contacting support, always tap **Update Data** to ensure your terminal is synced.

Pay Screen

This is your main screen for processing transactions.



Here, you can:

- Tap **SALE** or **REFUND** to start a transaction.
- Open the **menu (☰)** in the top left to access other features.

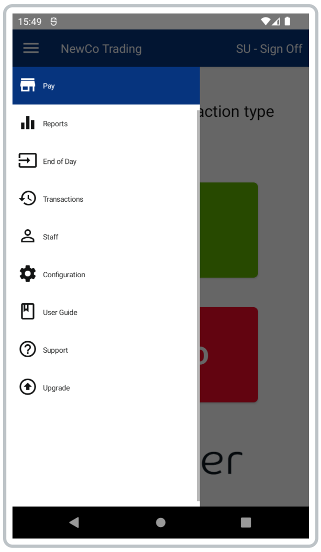
- Log out using **Sign Off** in the top right.

Learn more:

- ▯ How to carry out a sale
- ▯ How to carry out a refund
- ▯ How to log out

Menu (☰)

On certain screens, you can access the **main menu** by tapping the **hamburger icon (☰)** in the top left.



From here, you can access:

- Reports
- End of Day
- Transactions
- Configuration
- User Guide
- Support
- Upgrade

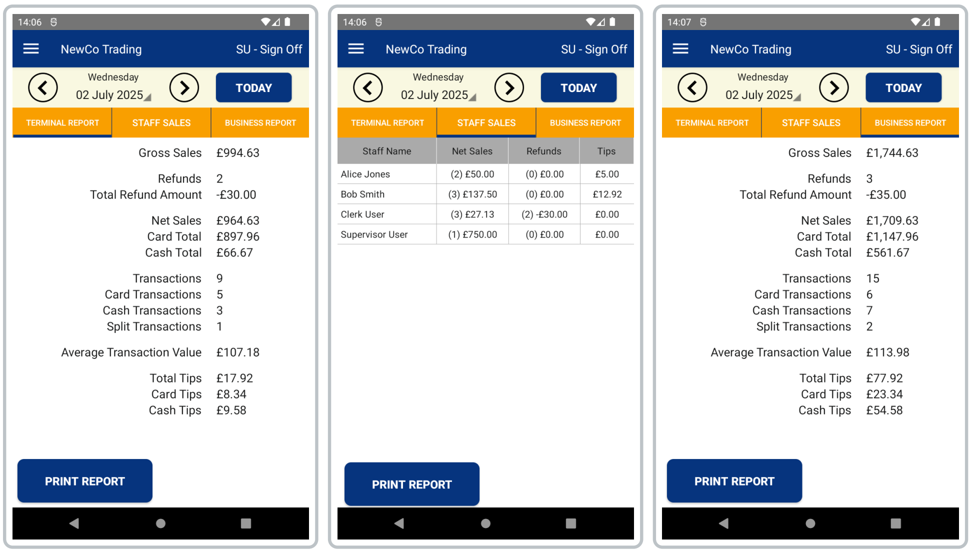
⚠ The menu may be **greyed out** during transactions. Complete or cancel the current process to enable it.

▯ Reports

The **Reports** screen provides access to key sales reports:

- **Terminal Report** – Daily totals for this device
- **Staff Sales Report** – Totals broken down by staff
- **Business Report** – Combined totals for all devices (multi-terminal businesses)

Use the date controls at the top to view reports for different days.



Learn more:

- More on available reports

End of Day

The **End of Day** screen generates a **Z Report**, showing all sales since the last end-of-day close.

For some payment integrations, completing this step also triggers **batch close/settlement** on your payment terminal.

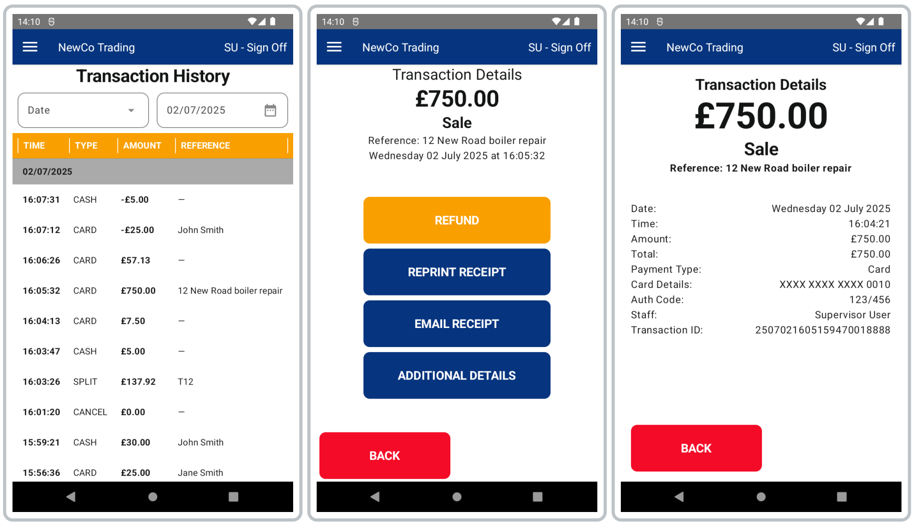
Learn more:

- How to complete End of Day

Transactions

View past transactions directly on your terminal. Tap on any transaction to:

- View more details
- Print or reprint a receipt
- Issue a refund (if applicable)



You can also search for transactions stored in the Web Portal using:

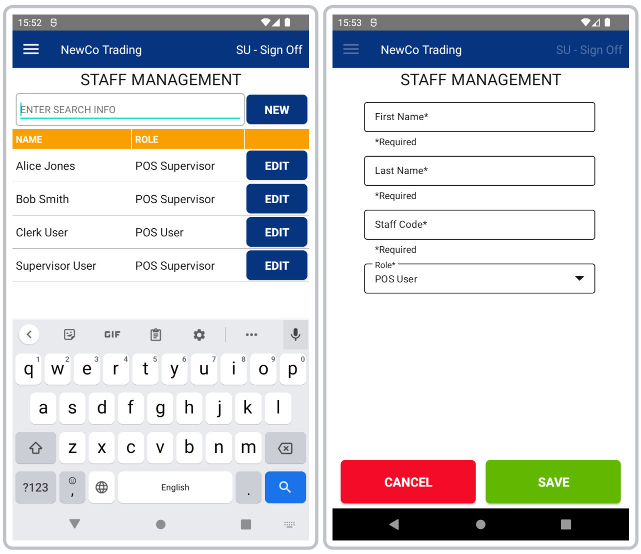
- Date
- Reference
- Transaction ID
- Last 4 digits of the card

Learn more:

- ? How to view previous transactions

Staff Management

The **Staff** screen allows you to manage team members who can access and operate the system.



From this screen, you can:

- **Search staff** – Quickly locate a staff member by typing their name into the search bar.
- **+ Add a new staff member** – Click the **New Staff** button to create a new user profile.
- ✏ **Edit staff member details** – Click the **edit icon (✎)** next to a staff member to:

- Update their **role** (e.g. Standard User, Supervisor)
- Change or reset their **staff code** for secure login access

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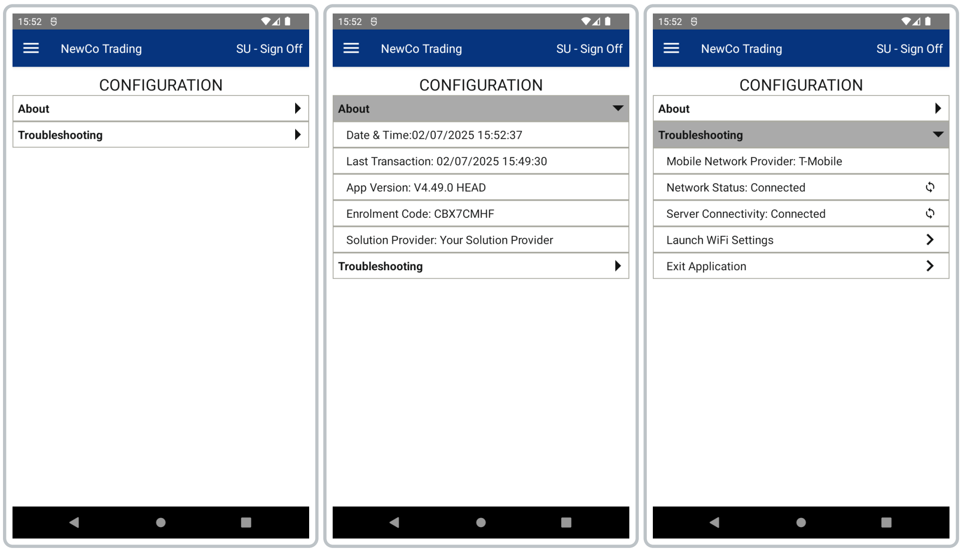
📖 Learn more:

- 🔗 How to manage staff

⚙ Configuration Screen

Use this screen for troubleshooting and system information.



Sections include:

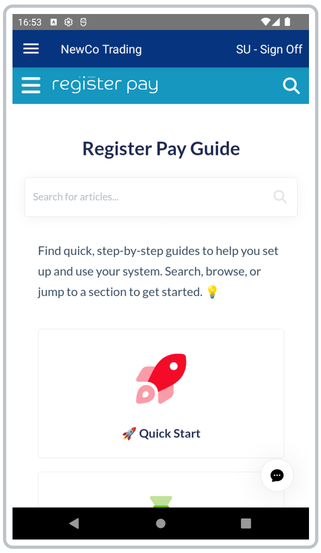
- About – View your device info (last transaction, version, enrolment code, etc.)
- Troubleshooting – Check internet and portal connections, access Wi-Fi settings, or exit the app.

📖 Learn more:

- 🔗 More on the Configuration screen

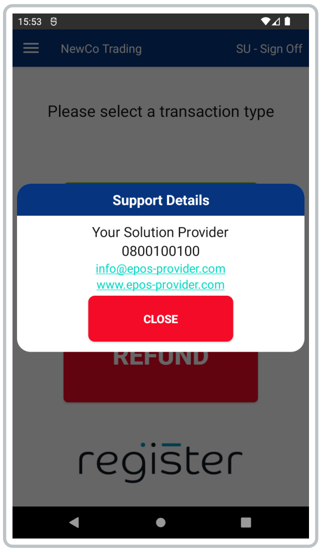
📖 User Guide

Tap User Guide in the app menu to view the full online version of the user manual.



⍰ Support

Tap **Support** to view contact details for your **Solution Provider**.

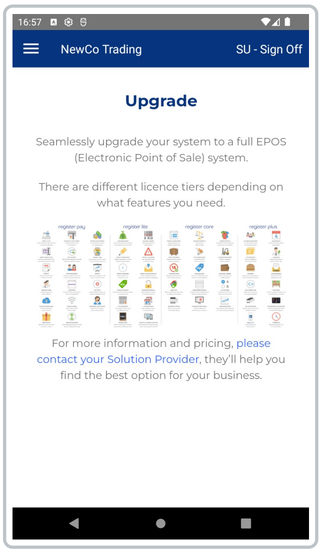


📖 Learn more:

- ⍰ Use this info for technical help or to log a support ticket.

🚀 Upgrade

Tap **Upgrade** to learn about features in higher-tier plans.



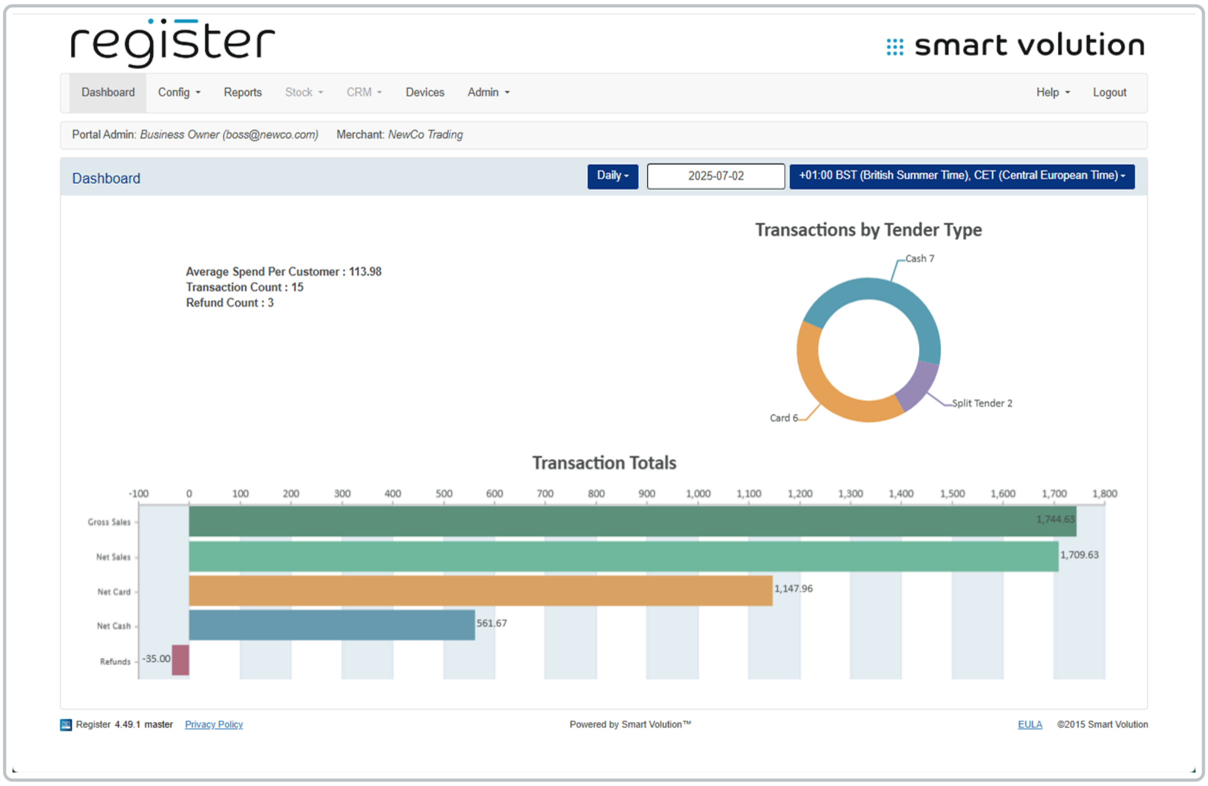
Learn more:

- ? If you'd like to upgrade to EPOS, contact your Solution Provider.

Web Portal (Back Office)

Your system is managed through the Web Portal, where you can:

- Manage staff and configurations
- Access and export centralized reports
- View all transactions from all devices



Learn more:

- ? More on Web Portal reports
- ? More on Configuration in the Web Portal