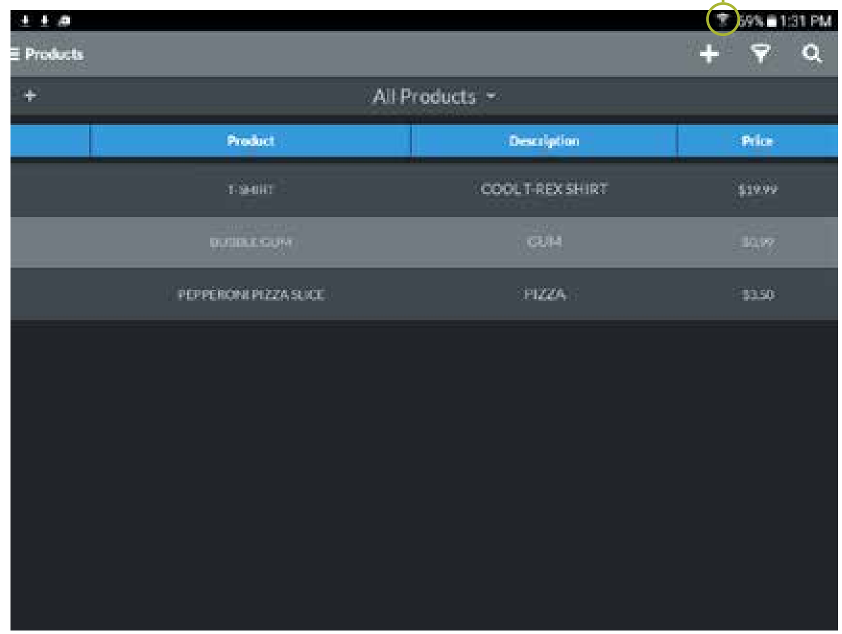
TSYS® TSYS Merchant Solutions℠

TSYS Tablet User Guide

www.tsysmerchantsolutions.com

WiFi is needed at all times when using the Tablet

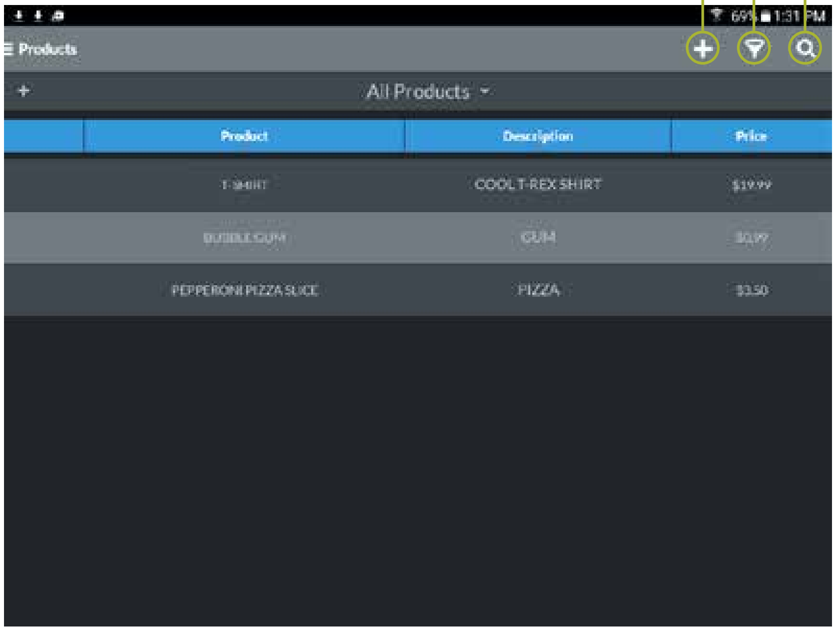
To select an item tap or touch the button/item on the tablet screen



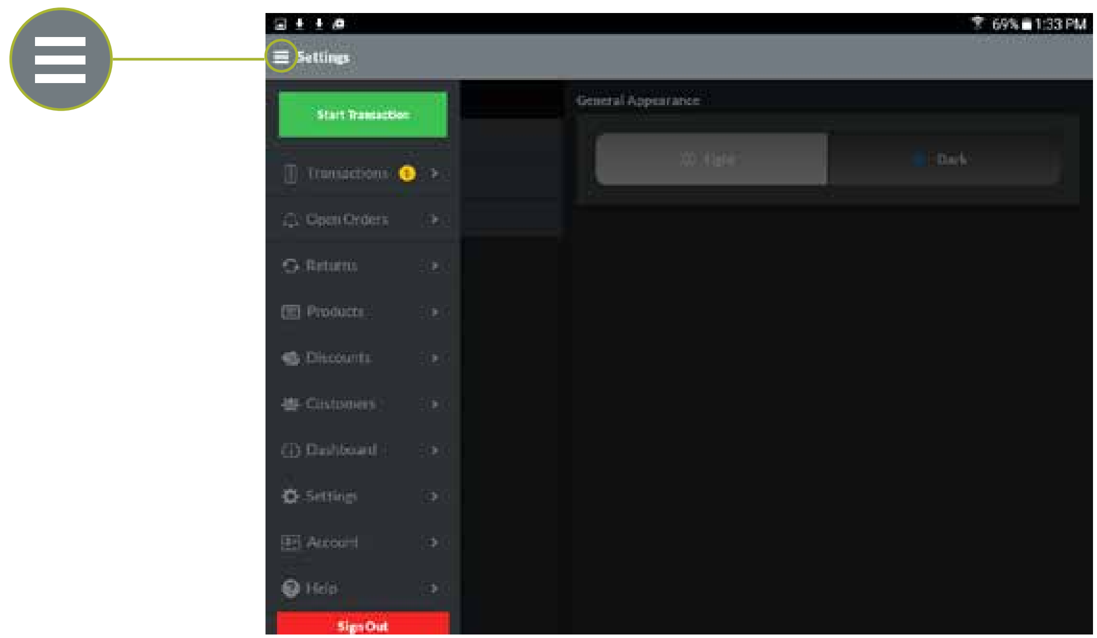
Use the + button to add items

Use the Filter button to filter
a search by selected fields

Use the Search button to search

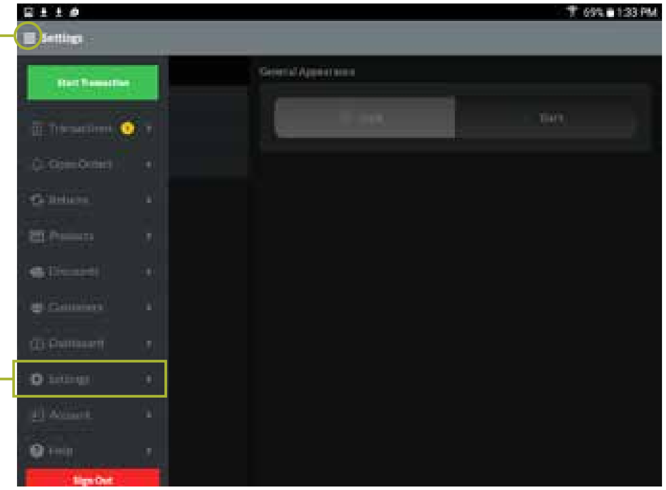


Use the menu icon in the upper left hand corner to access functions



From the Menu

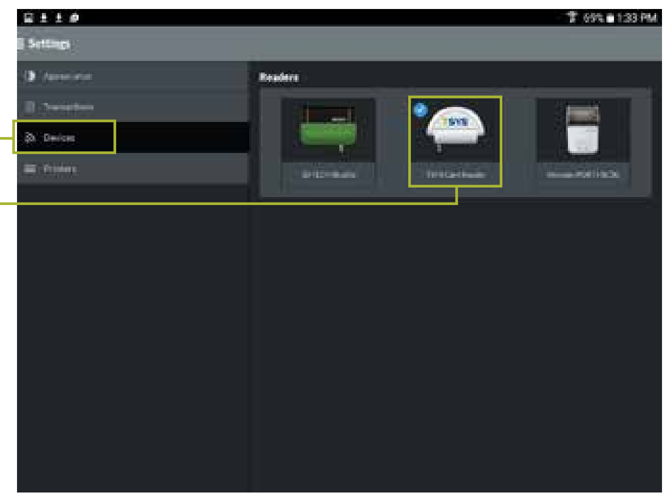
Select Settings



Select Devices

Select the image of the reader you received with your tablet.

A blue check mark lets you know the reader has been added.



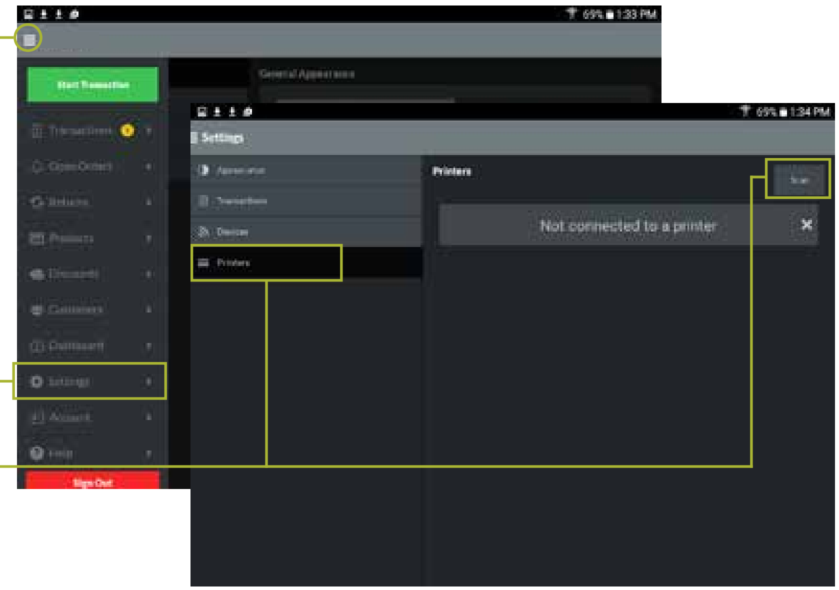
Adding a Printer

From the Menu

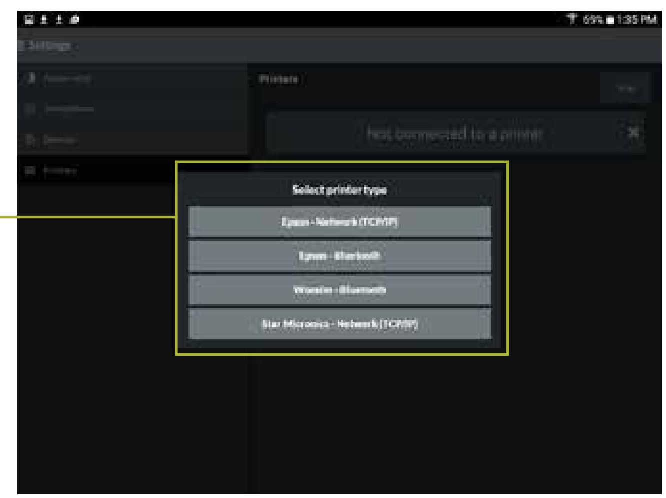
Select Settings

Select Printers

In the upper right hand corner, select the scan button



Select the printer from the list



Before entering in your products, set up tax rates, discounts and product categories.

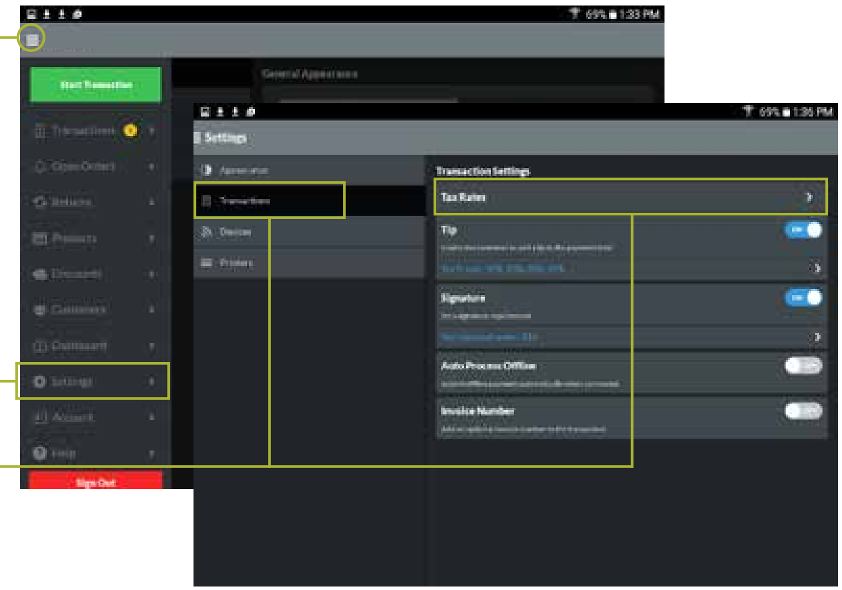
Set up the tax rate to include tax with each transaction

Menu

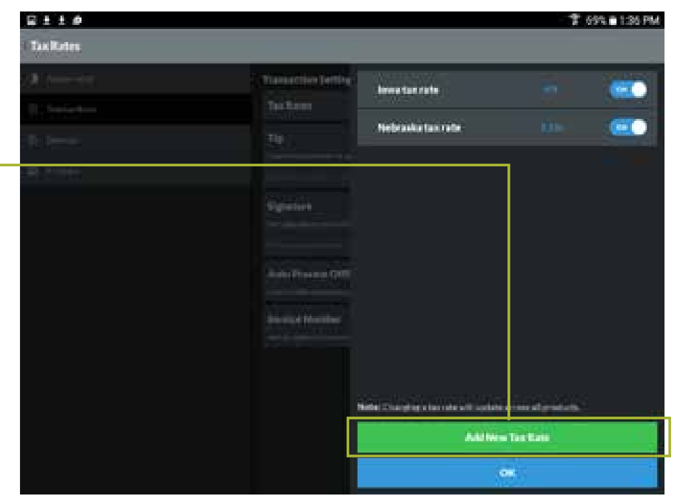
Settings

Transactions

Tax Rates



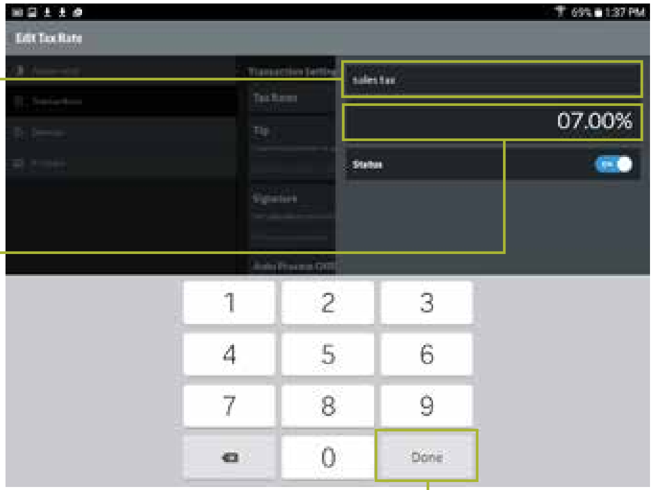
Add new tax rate



Enter the tax rate name, such as sales tax or city tax

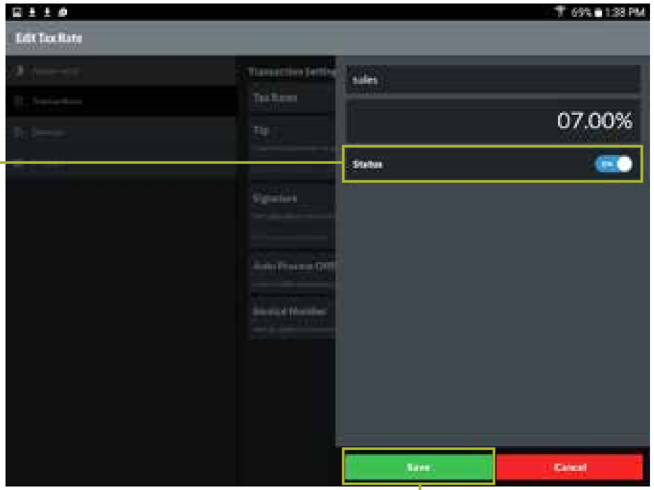
Enter the tax rate or %

Select Done on the keypad



Swipe the Status bar on or off to enable tax on each transaction

Select the Green Save button



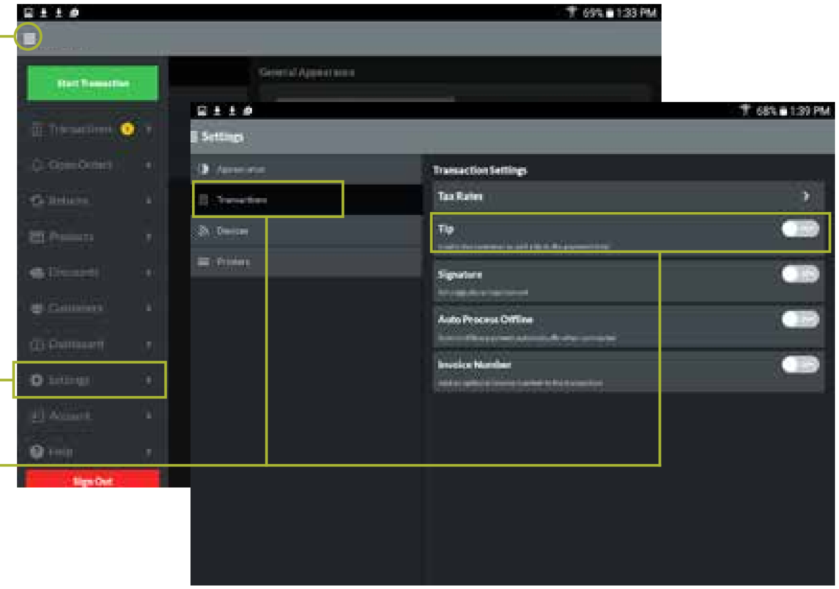
Set up the tip function to show tip percentages on each transaction near the signature line.

Menu

Settings

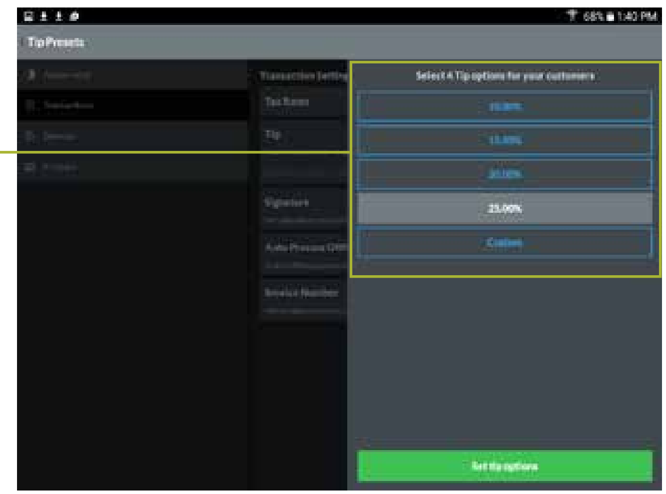
Transactions

Swipe the button to enable Tip

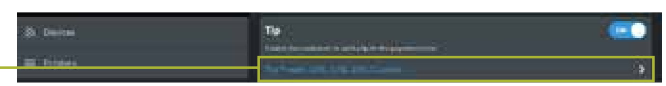


Click four tip amounts or percentages you want to display on the screen for the customer (four are required)

Select the green Set Tip Options button



The Tip Preset will show active tip amounts



Set up signature required amounts and signature on-screen

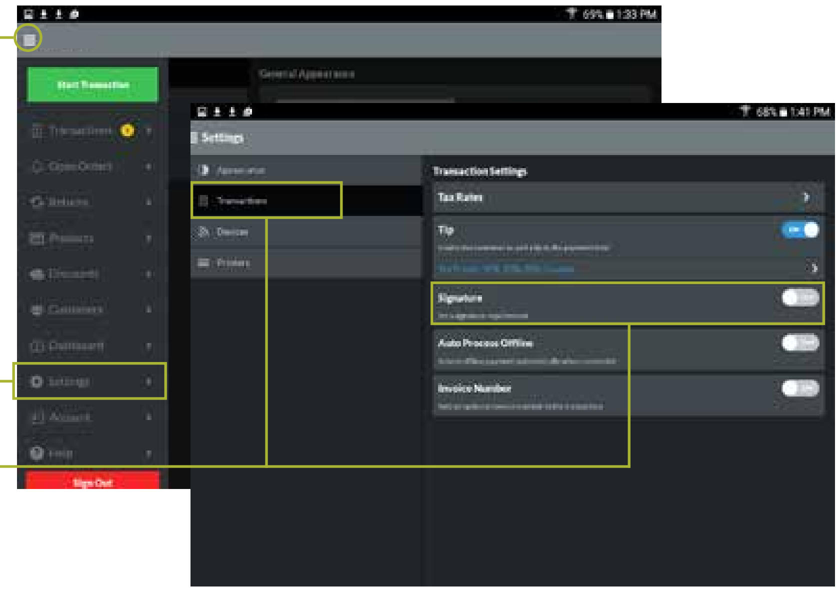
Menu

Settings

Transactions

Signature

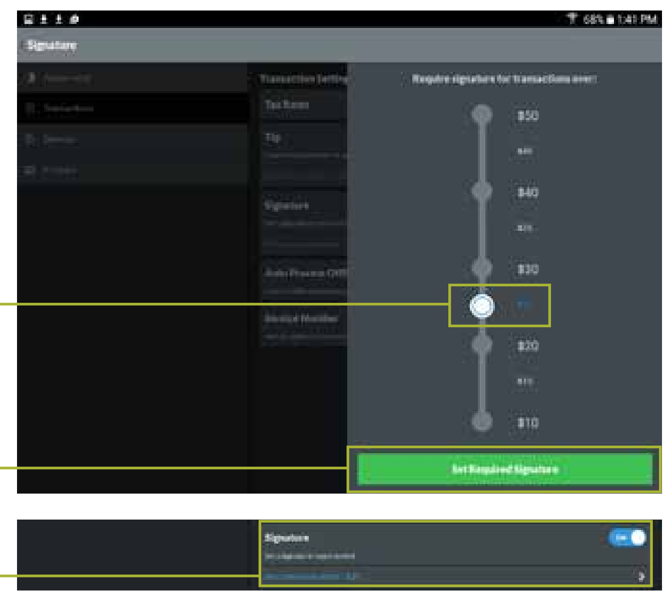
Swipe the Status Bar to On to enable signature



Swipe to select the transaction amount you want customers to sign for. (Card brand rules vary, check to verify the amount required for your business.)

Select the Green Set Required Signature Button

Signature required will be ON and the Not Required under $ dollar amount selected will show



For those moments when you do not have coverage and need to accept a transaction, enable Auto-Process Offline to store transactions until you are again connected to Wi-Fi ***this is considered a HIGH RISK transaction, the card could be declined***.

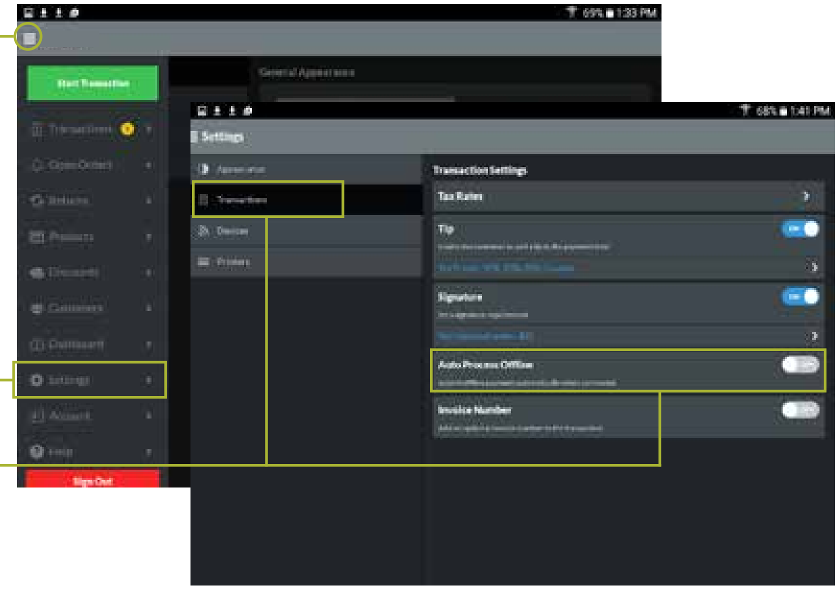
Menu

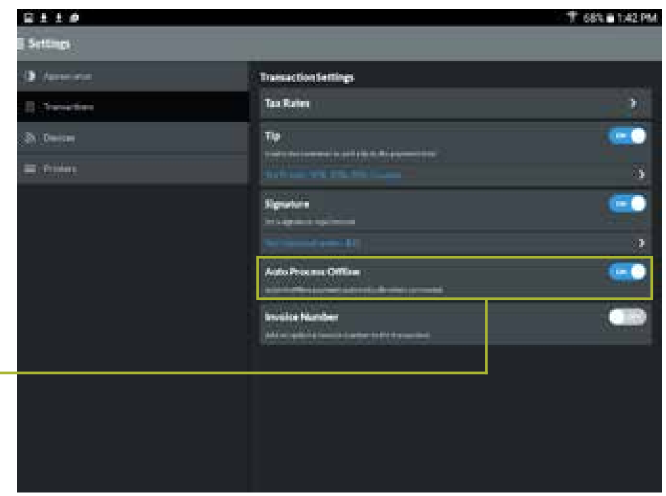
Settings

Transactions

Auto Process Offline

Swipe the Status Bar On to enable this feature





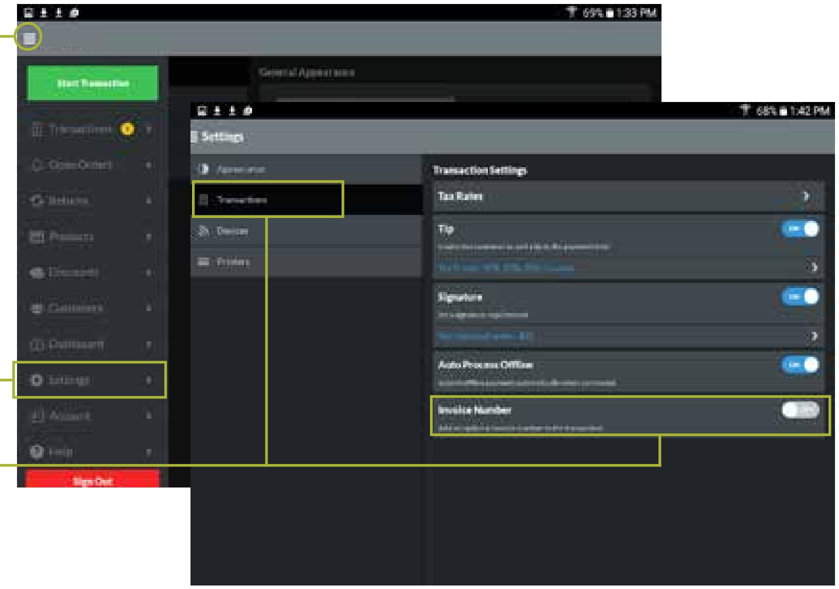
Set up Invoice Number to manually add an invoice number to each transaction.

Menu

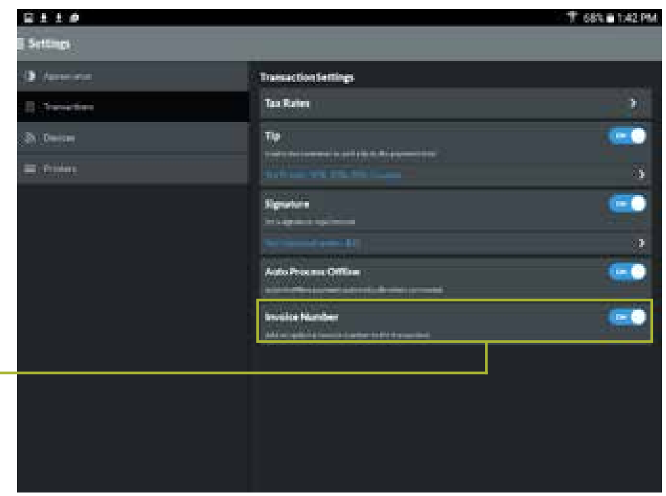
Settings

Transactions

Invoice Number



Swipe the Status Bar On to enable manual entry of an invoice number with each transaction.

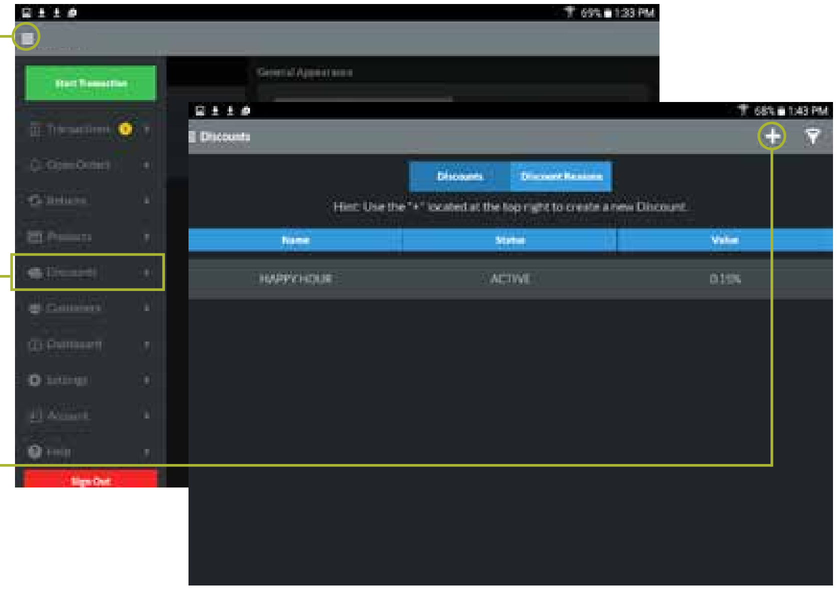


Set up discounts for sales or specials

Menu

Discounts

Tap the + button to add a discount

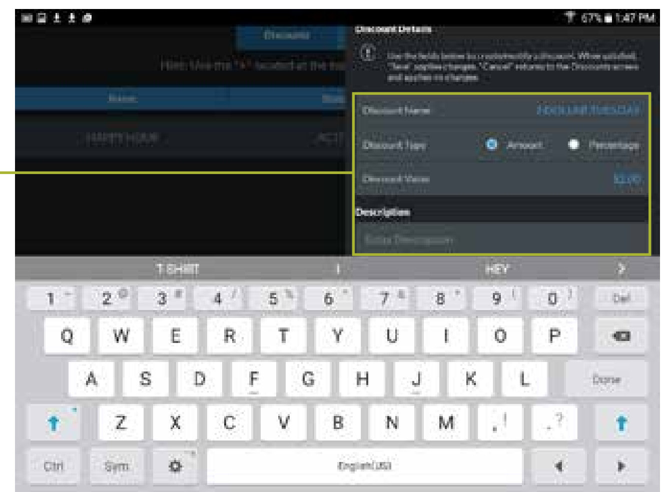


Enter the discount name ($2 Tuesday)

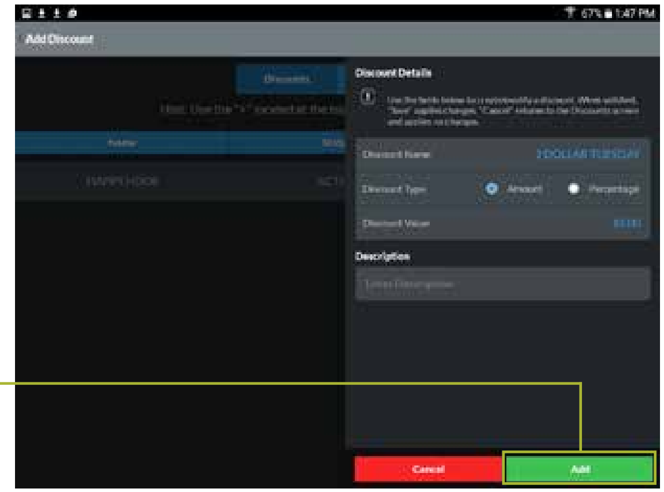
Select the circle next to the type of discount you are adding either % or $.

Enter the amount of the discount

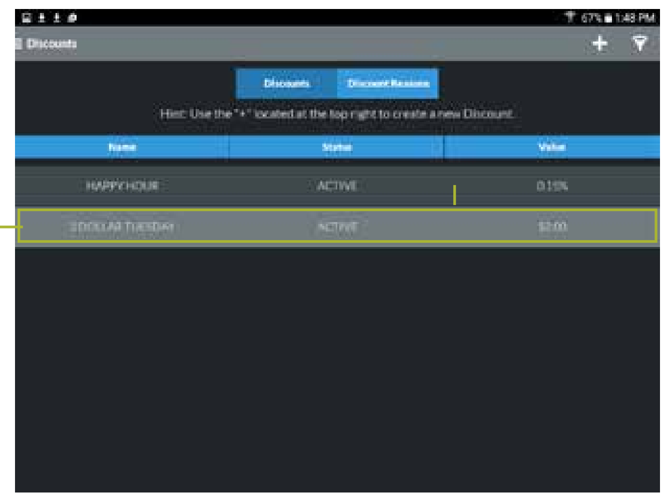
Type in an optional description



Select the green Add button



Discount will be listed

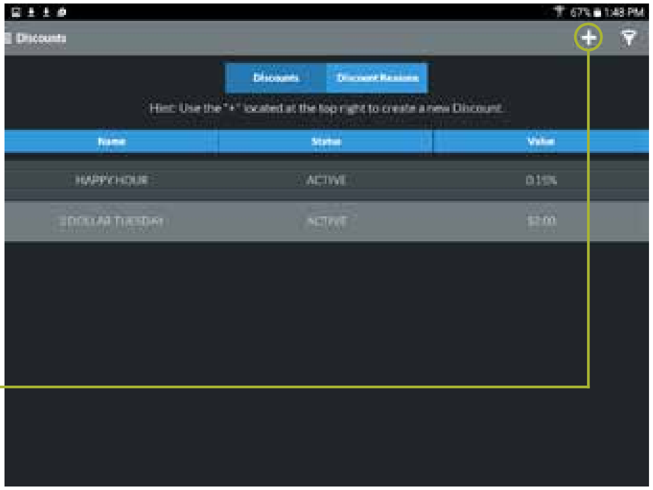


Select the + button to add a discount reason

Enter the discount reason

Click the Green Add button to add the discount reason

Discount Reason will be listed



Product Categories

Set up Product Categories to categorize your products and services.

Set this section up in a manner that makes the most sense for your business. A product category can be an identifier your business uses. Some examples would be: desserts, T-shirts or Jewelry.

Menu

Products

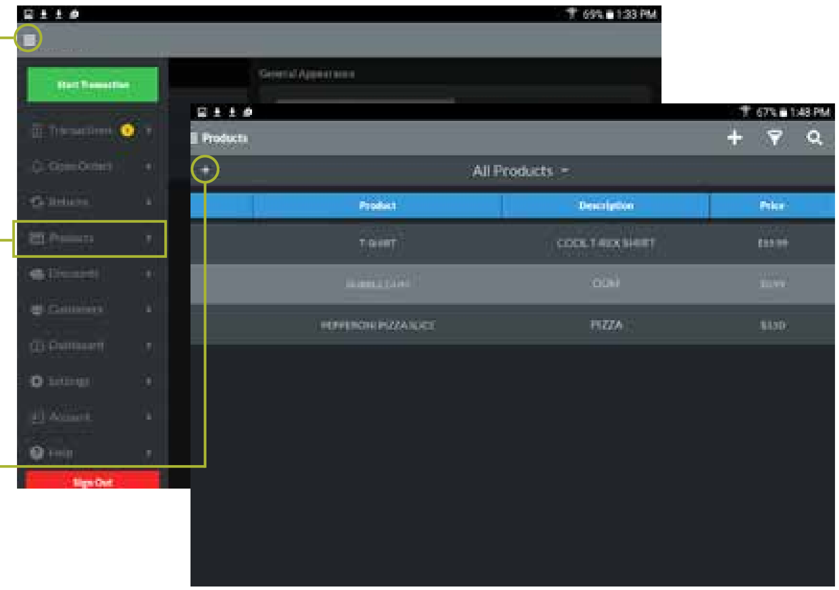
Select the + (plus button) in the upper left hand corner to add a category

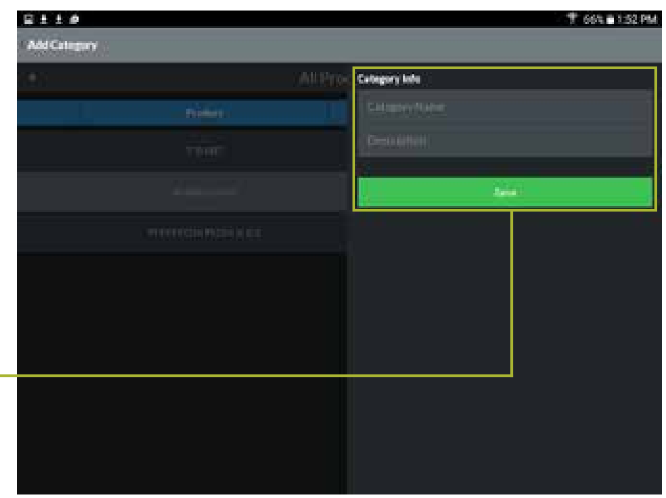
Enter the Category information (i.e. t-shirts, jewelry, desserts)

Enter Category Name (optional)

Enter Description (optional)

Select the green save button





Menu

Products

Select the + (plus sign) in the upper right hand corner

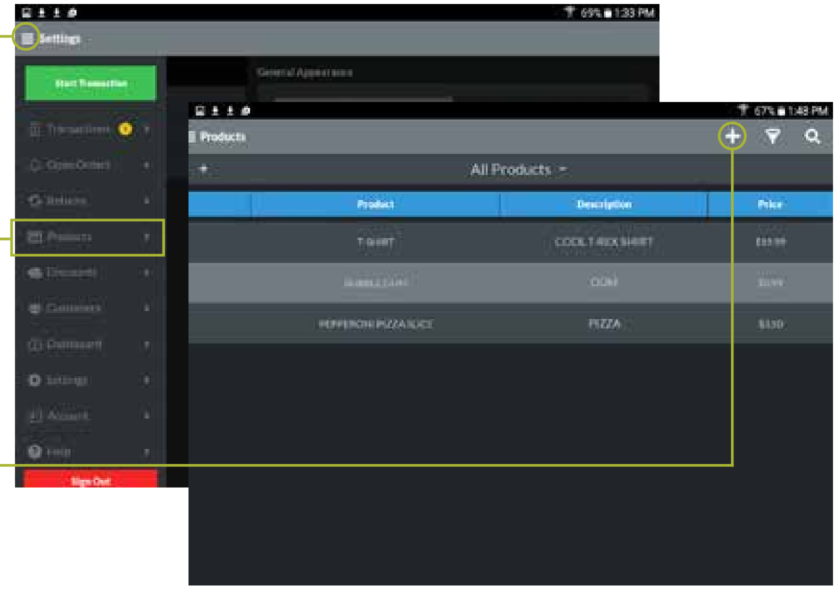
Enter the following:

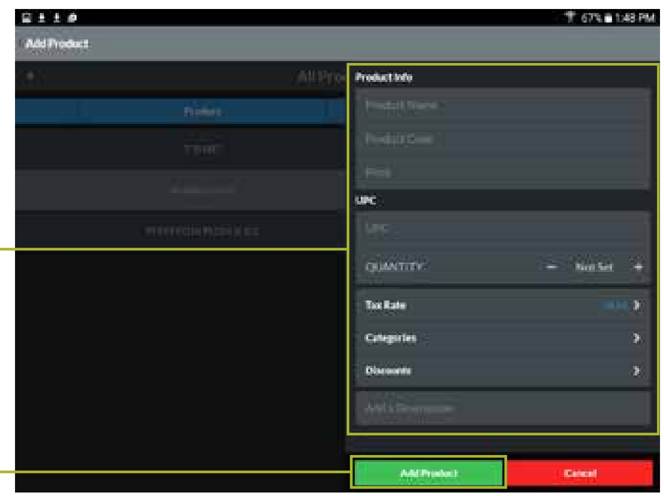
Product Name, Product Code (this is not the UPC, use this code to enter how your business identifies the product), Price, UPC, if available, Quantity currently in stock

Tax Rate, Category, Discount % or $ amount if the item is on sale

Descriptor (optional) add additional information about the product

Select the green Add Product button





From the Menu

Select Customers

Select the + in the upper right hand corner to add a customer

Enter the following customer information:

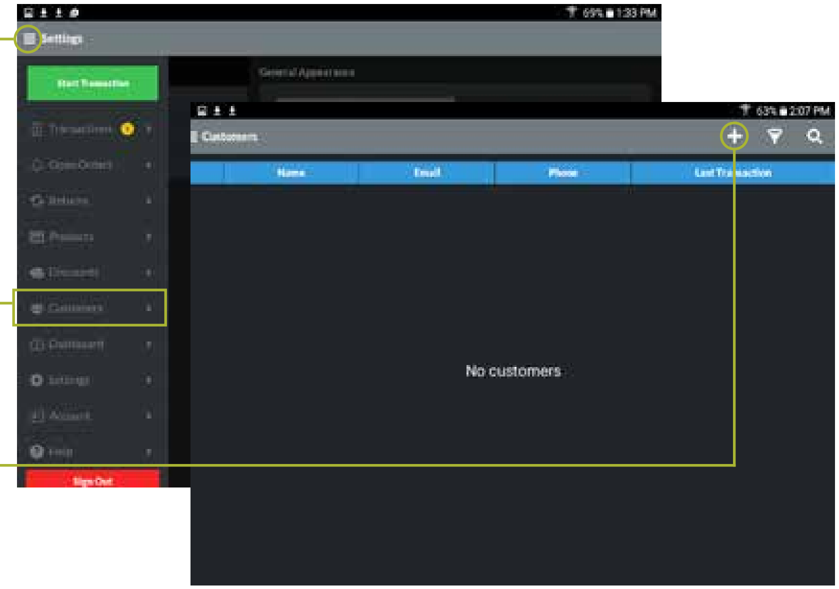
First Name, Last Name
Phone, Email

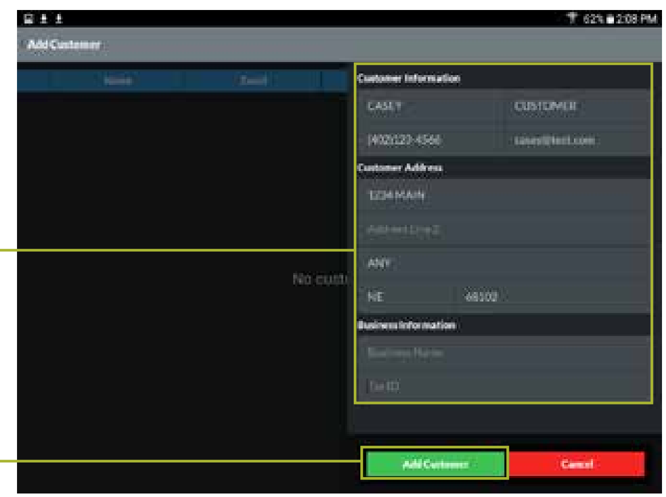
Address, City, State, Zip

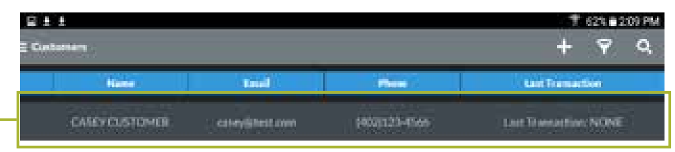
Business info, Tax ID #

Tap the green Add Customer button

Customer is listed on the Customers Screen







SALE TIPS

Quick Sale
Use to enable a quick sale without product information

Product Sale
Use to complete a sale from saved product information

Scan
Use this to scan a bar code

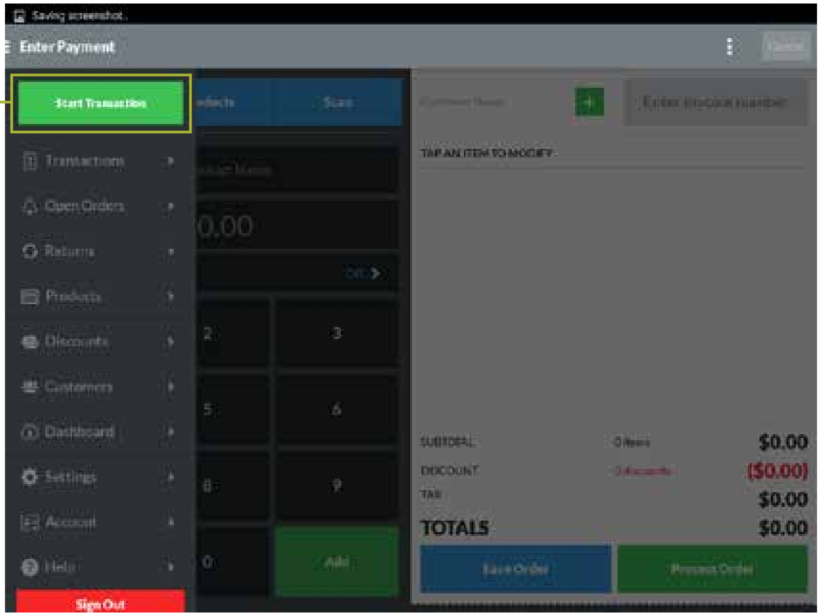
Taxable
Will be in the off or on position, select the > to change to on or off

Customer Name
Enter Customer Name using the green + button to search for a customers or use the + button in the upper right hand corner to add a new customer during the sale

Invoice Number
Manually enter an invoice number if this option is enabled

Cash transactions
Click the cash button

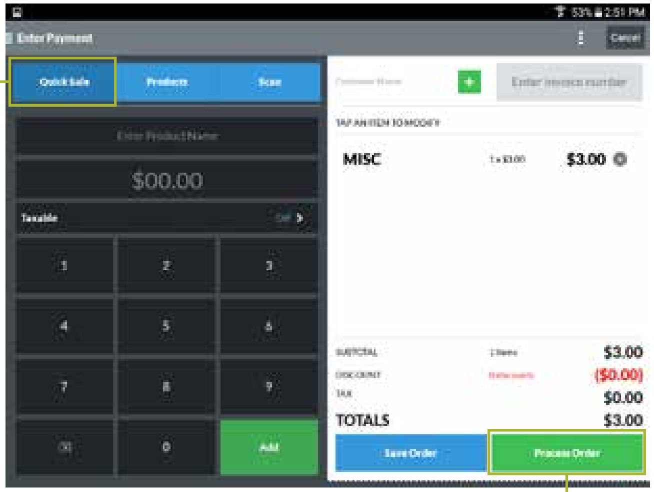
If the sales screen is not on the main screen from the menu, select the Green Start Transaction button



Click the Quick Sale Button

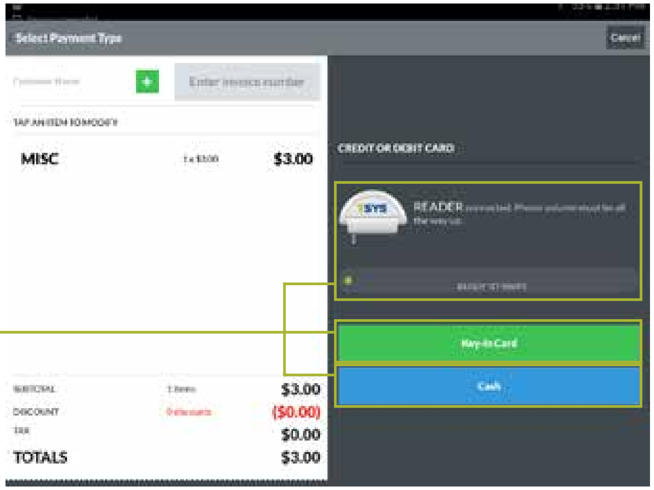
Enter the amount

Click the Green Process Order Button



Swipe the card or select Key-In Card or Cash

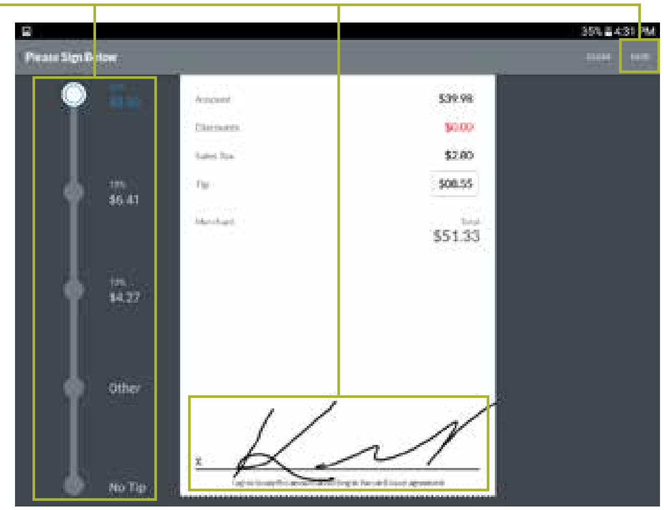
For card sales, the card and amount of sale will display on the screen



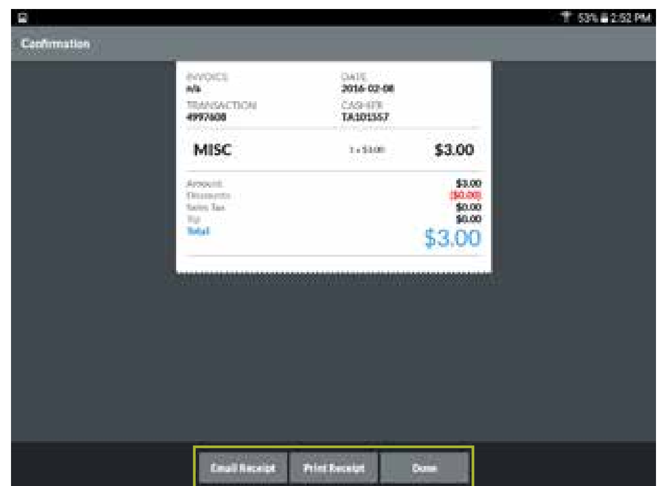
Select continue

If applicable Flip the screen toward the customer to add a tip and/or sign for the sale.

Select Save from the upper right hand corner



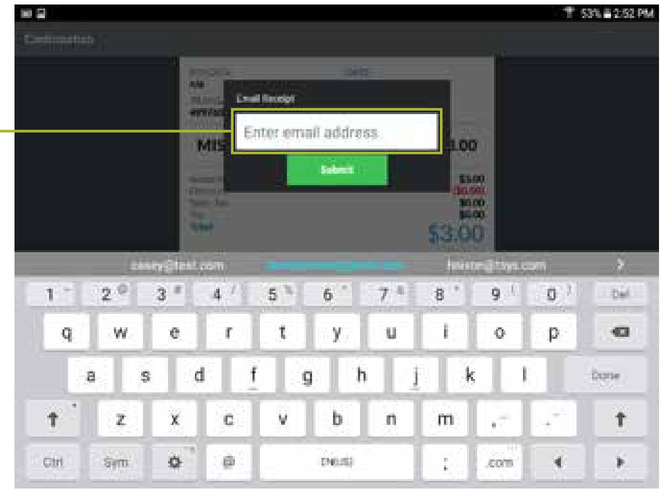
Select print receipt, Email Receipt or Done



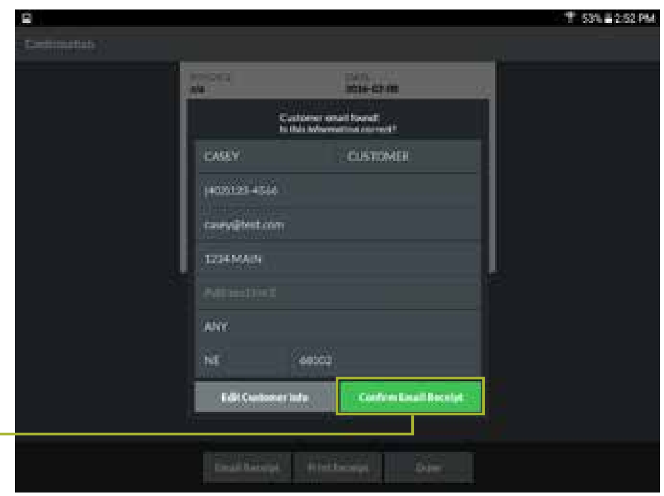
Emailing a receipt

Select Email Receipt

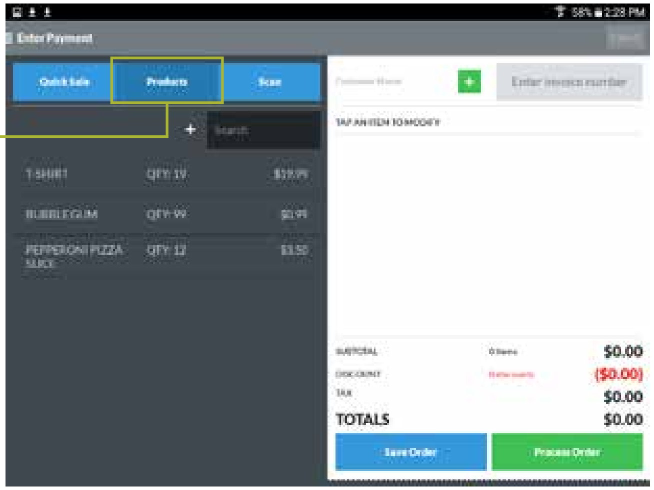
Enter Email address



If all information is correct, select the green Confirm Email Receipt button



Select the blue Products button



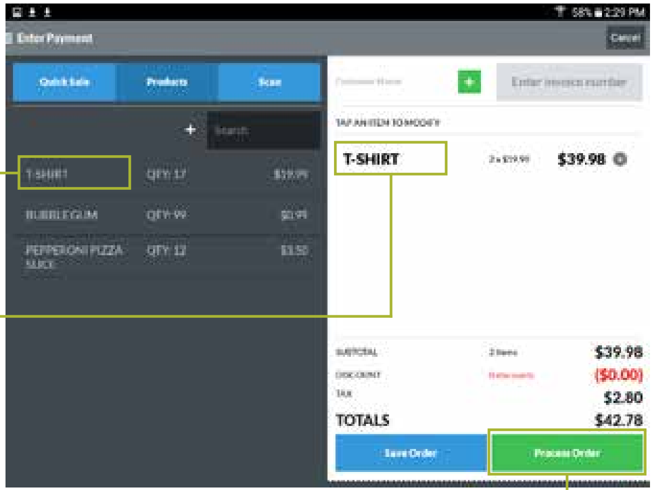
Select the product or service

Tap the item to change the quantity or add a discount

Change or enter quantity if more than 1

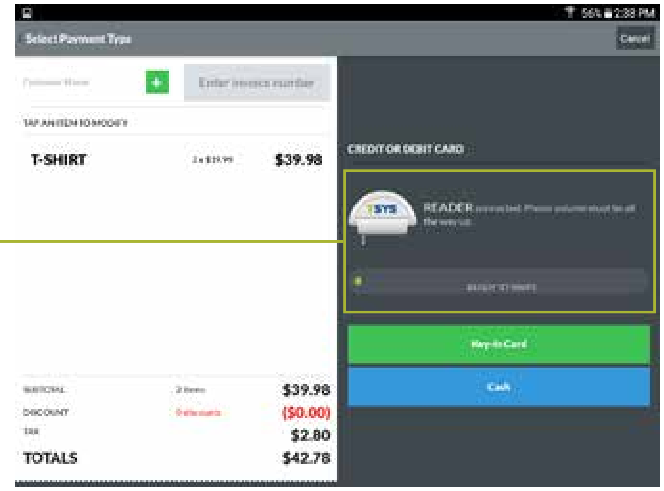
Click update Item if quantity changed or a discount was applied

Select the green Process Order button



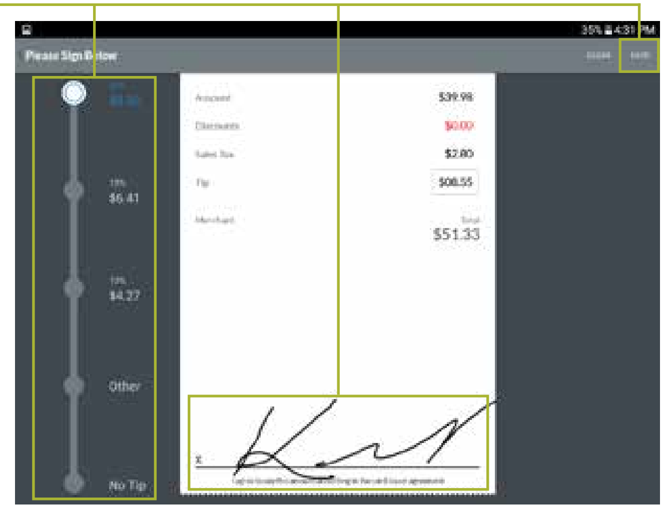
Swipe the card

Select the gray Continue button



If applicable - Flip the screen to the customer so they can sign or add tip if applicable

Select Save from the upper right hand corner



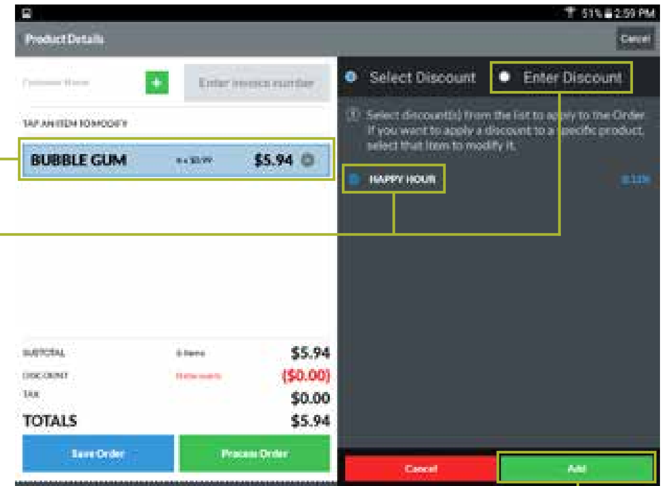
Select Print Receipt, Email Receipt or Done

Select the item

Select Discounts

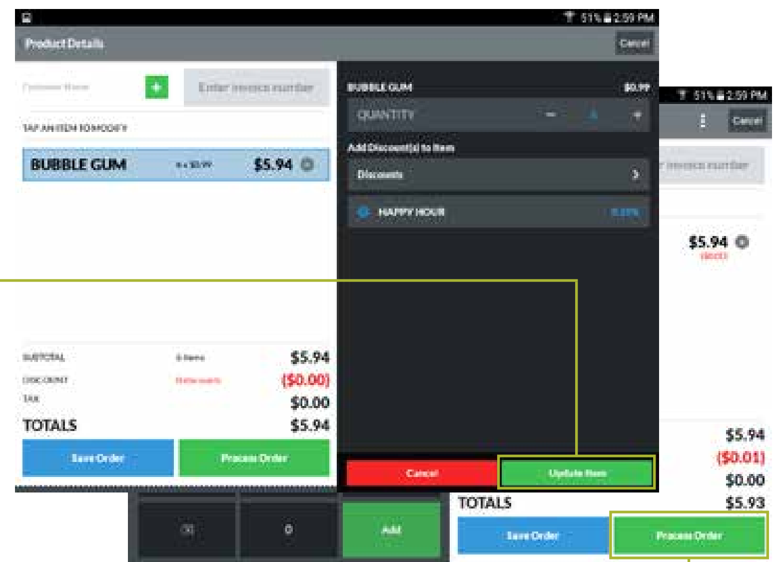
Either select an existing discount or enter a discount

Select the green Add button



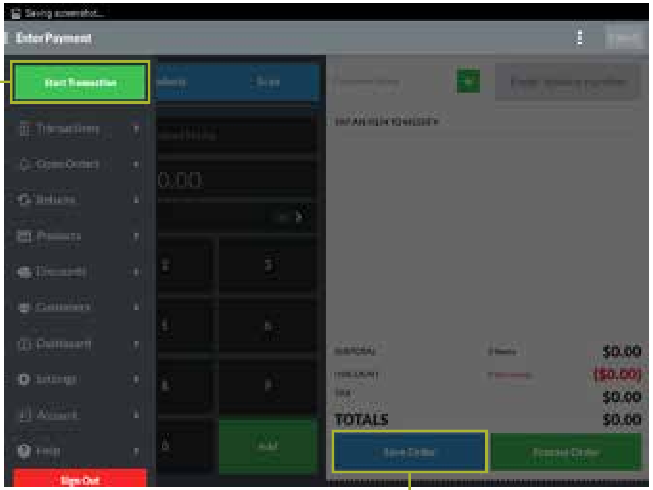
Select Update Item

Select Process Order

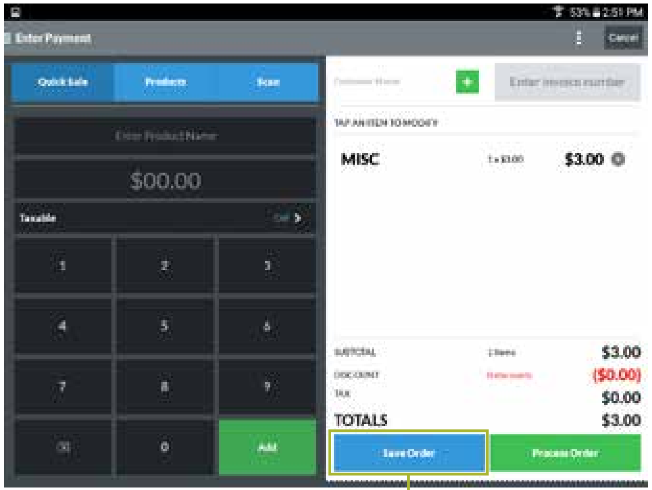


Select Start transaction

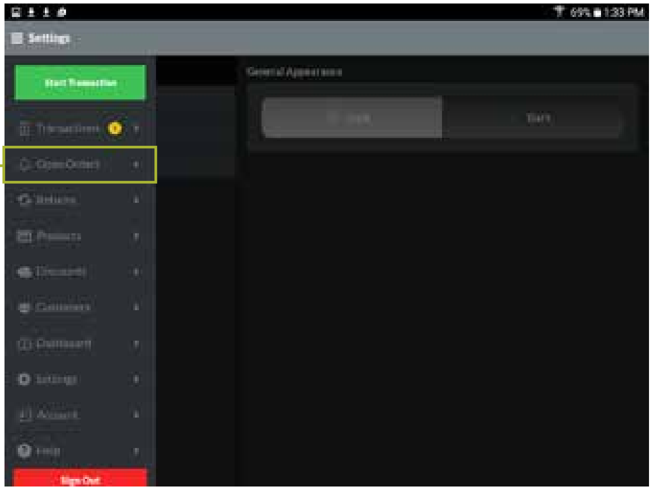
Select Save Order



Select Blue save order button

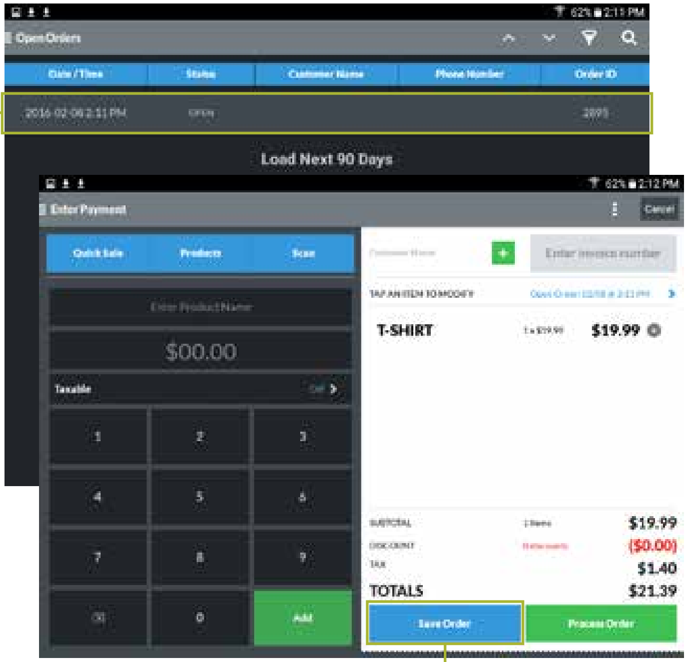


Select Open Order

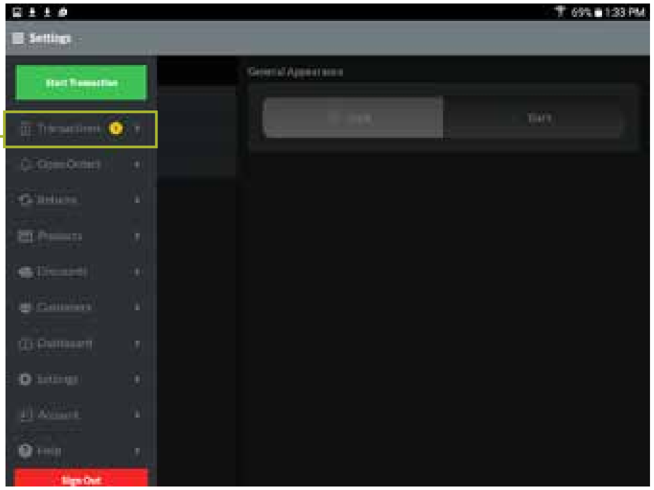


Select the Open Order you want to process

Select the green process order button



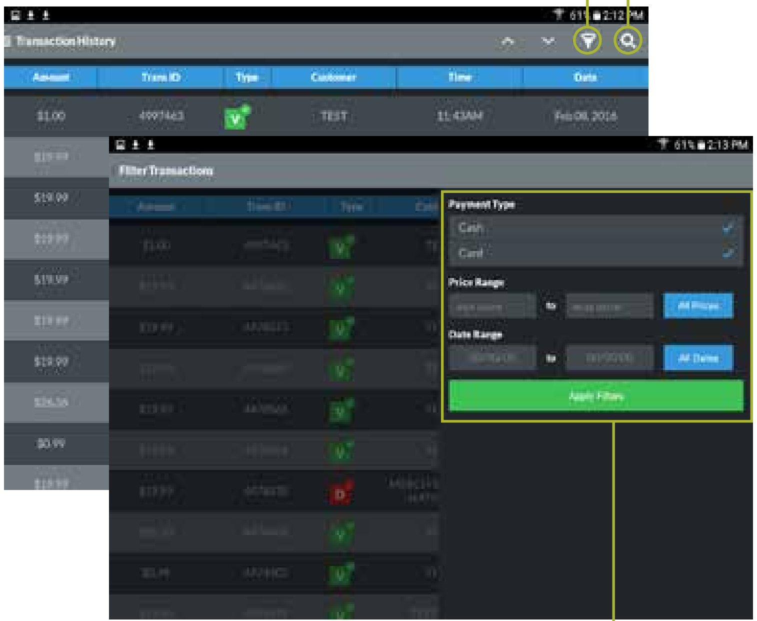
Select Transactions



90 days of transactions are available

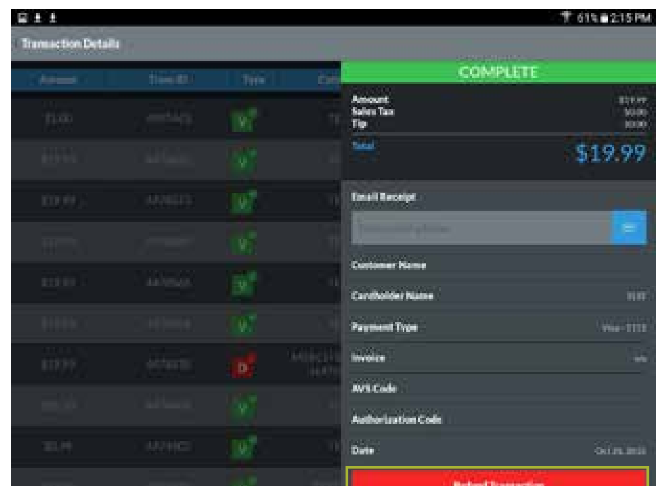
Use the Search feature to search by an available field

Or use the Filter to search by Payment Type, Price Range or Date Range



Select the transaction from the list

Click the Red Refund Transaction

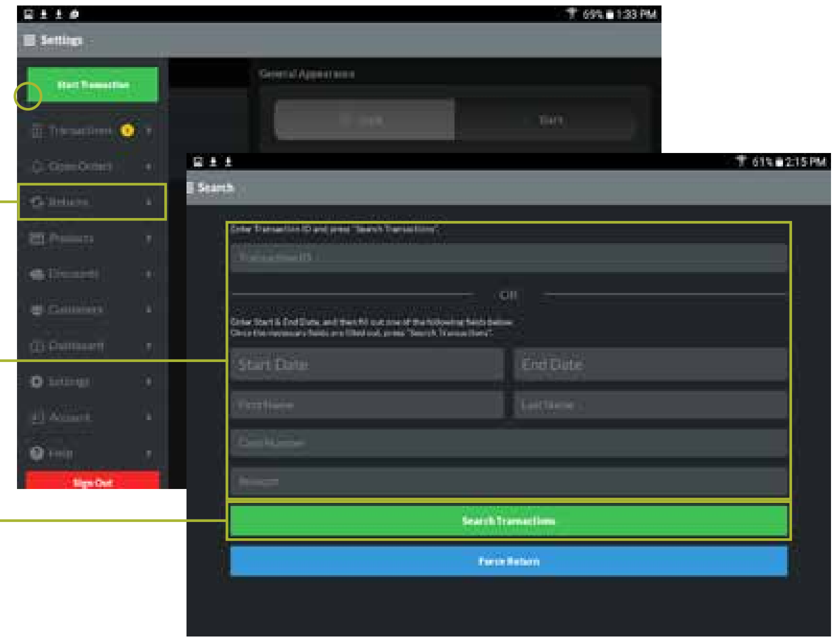


Returns - Option 2

From the menu select returns

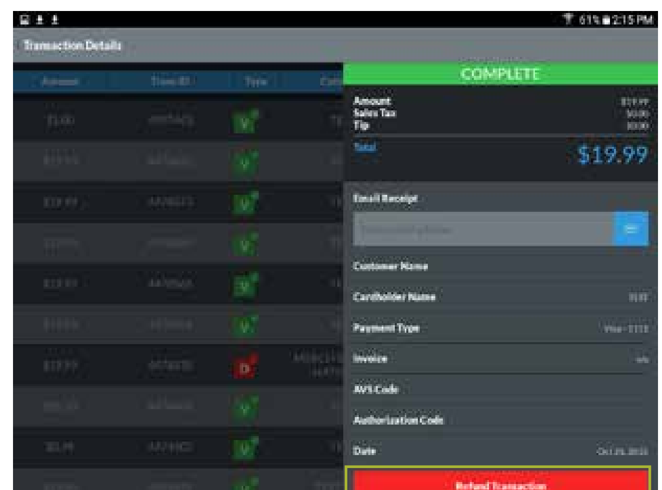
Search by any of the applicable fields - date range or transaction id required

Select the green Search Transactions bar



Select the transaction to refund

Select the Red Refund Transaction

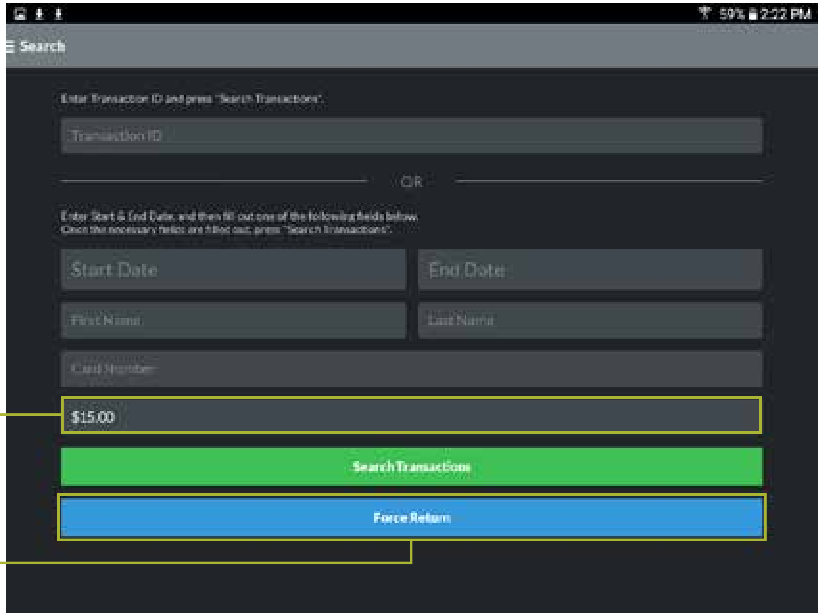


Enter the amount of the return

Press the blue Force Return button

Swipe or key the card

Select Process return

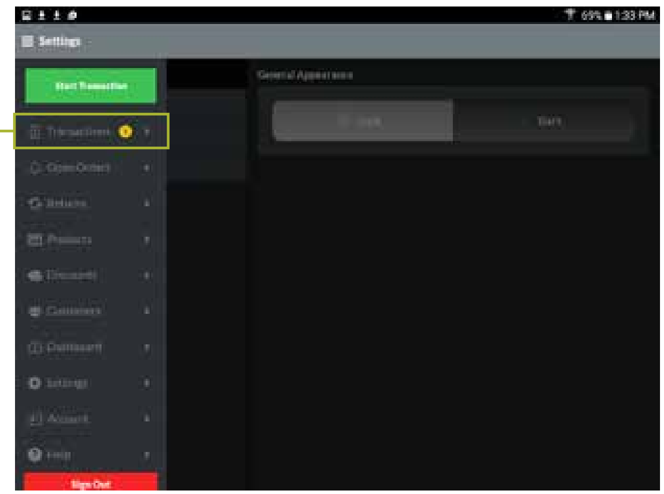


Voids can only be complete the same day prior to a batch being submitted

From the menu select, Transactions

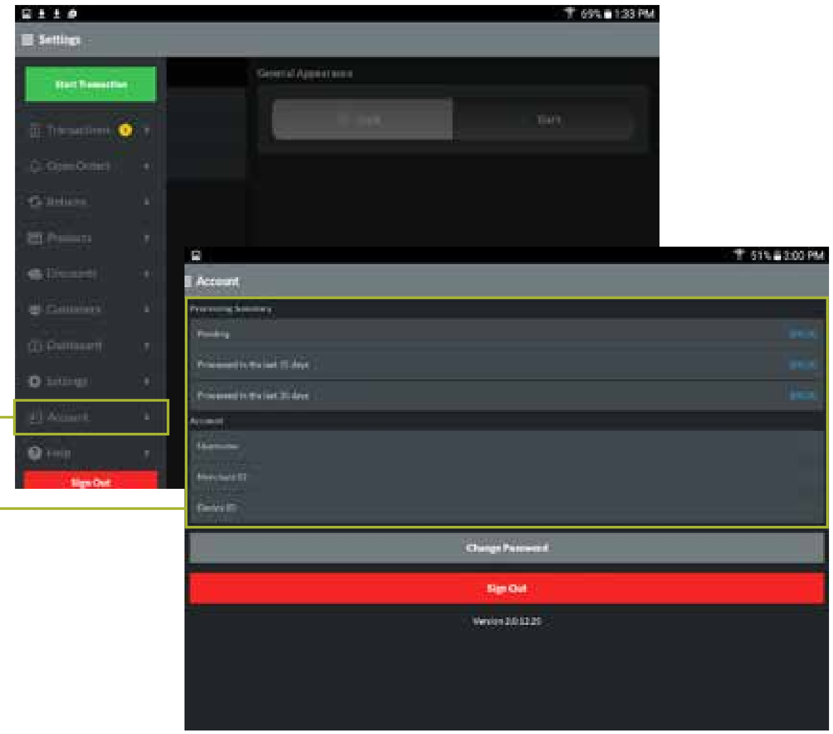
Find the amount of transaction, customer time, date of transaction

Select red Void Transaction button



Processing Summary

From the menu select Account
to see your processing Summary



The Dashboard will show your Total Sales, Discounts Total, Product Totals and Customer Totals.

You can customize your view for sales.

Sales

Use the drop down menu to select the view of sales:

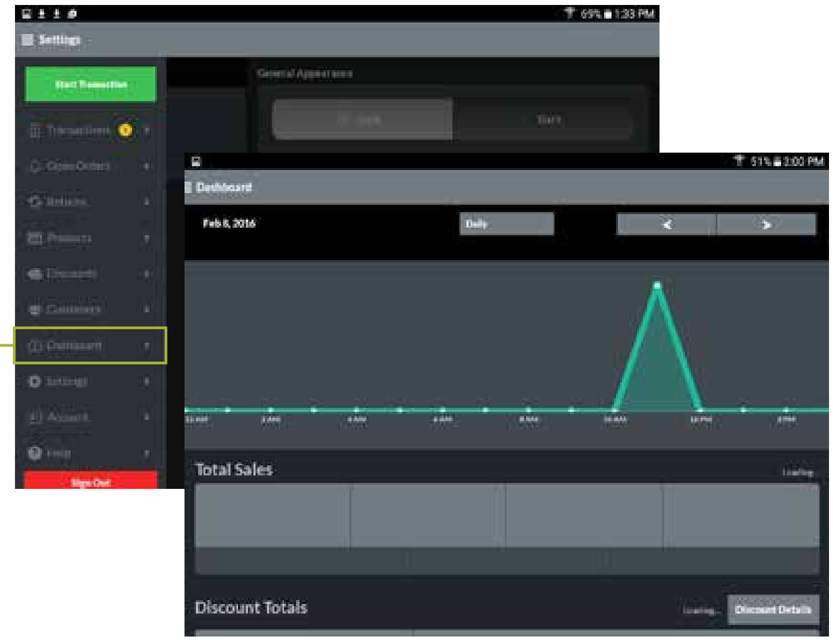
Daily
Weekly
Monthly
Yearly
Custom. Input date range (limit)

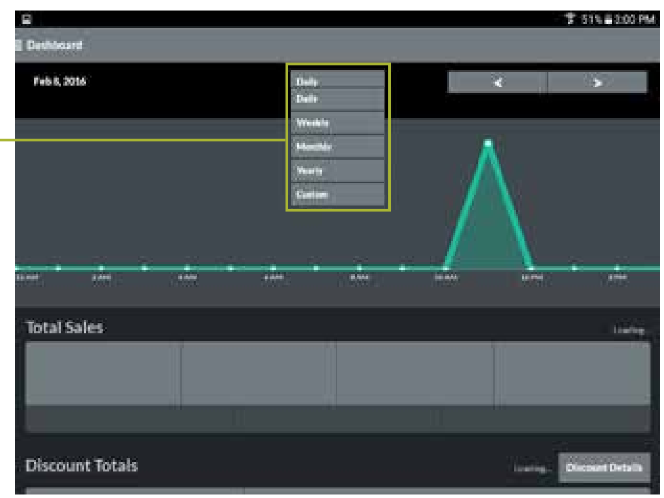
Discount Totals

Product Totals

Customer Totals

Click the Generate PDF button in the upper right hand corner to save the current Dashboard view





Charge when not in use, as the plug in to charge interferes with the card reader.

Volume should always be on high