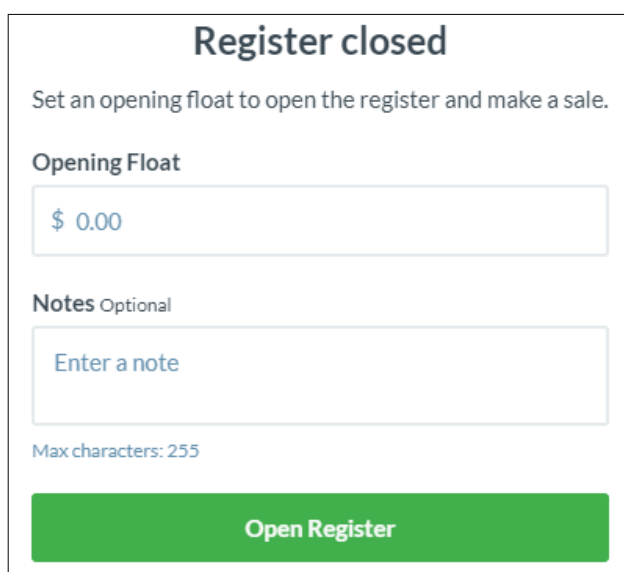# MPH Retail IT Operations Guide

1. Logging In

1. Please refer to 4. Switching User.

2. Go to marypotterhospice.vendhq.com.

3. Enter your full name (with a space) and your password. Tap "Sign In".

2. Opening the Register

1. Enter the cash float amount under "Opening Float".

2. Tap "Open Register" to begin selling.

3. Closing the Register
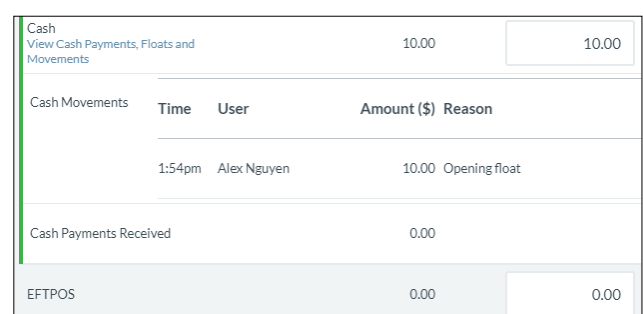
1. In the top left corner, tap "Menu", then "Sell". Then tap "Open / Close".
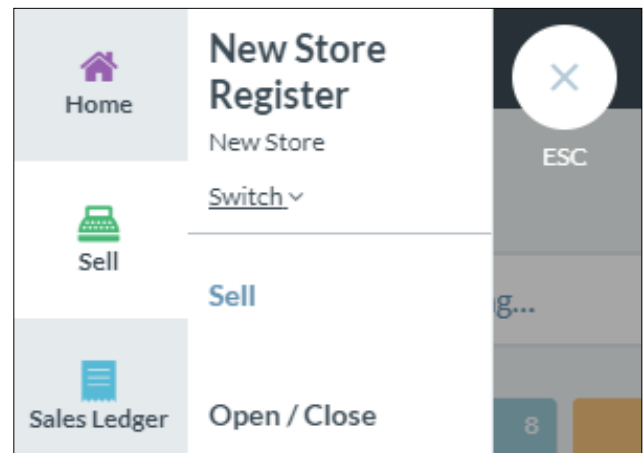
2. Each payment type will be listed with the amounts that Vend expects. Next to that is where you enter the counted amount for each payment type.

   For cash, count the cash in the cash drawer **including the float**.

   For EFTPOS, perform a settlement inquiry or cutover from your terminal.

3. Add a note to explain any discrepancies.

4. Tap "Close Register".

4. SWITCHING USER

4a. Switching User – Quick Login

1. Go to the main Sell screen.

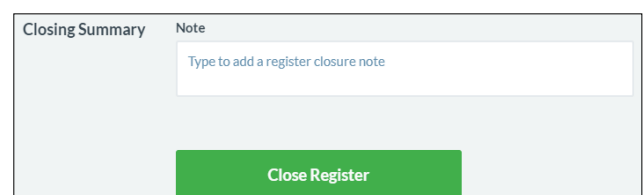2. Scan the barcode below your name on your store's Vend User List printout.

   This should switch accounts automatically. Verify this by checking the top right corner.
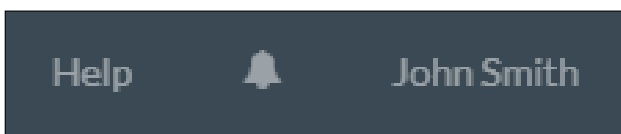
   If you're switching to a manager's account, you will need to enter your password.

   If this method doesn't work, switch accounts manually.

4b. Switching User – Manual Login

1. Tap the name in the top right corner.

2. Tap "Switch user".
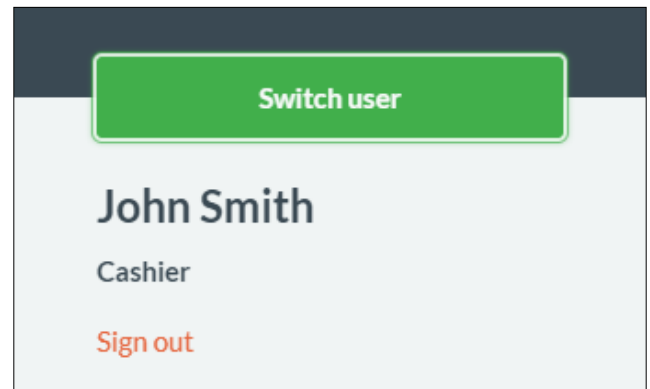
3. Find and tap on your name – it may be listed or you may have to type it in.
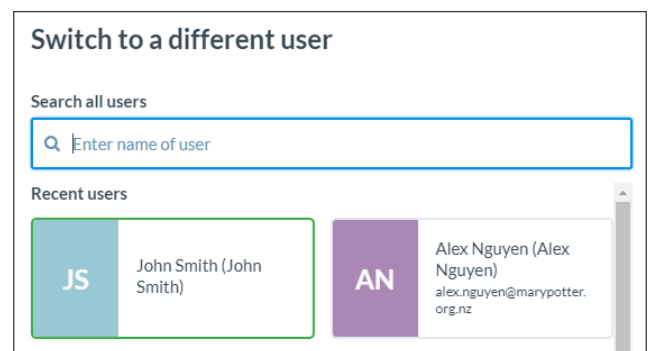
4. If prompted, enter your password, and tap "Switch user". Verify that you're signed in by checking the top right corner.
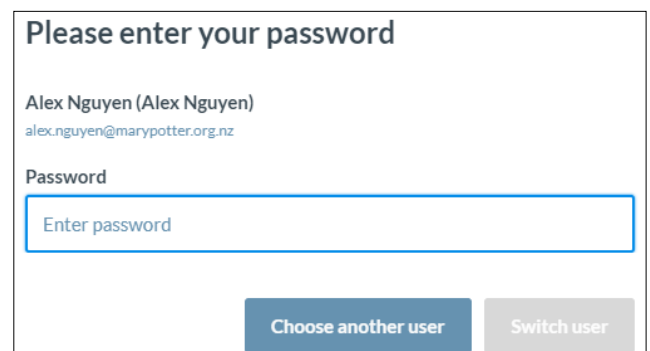
For password resets, please call IT Support on 021 957 349.

5. Basic Sales

1. For each item, find the relevant product category using the buttons.

   If you aren't able to find the product, try searching for it using the search bar.
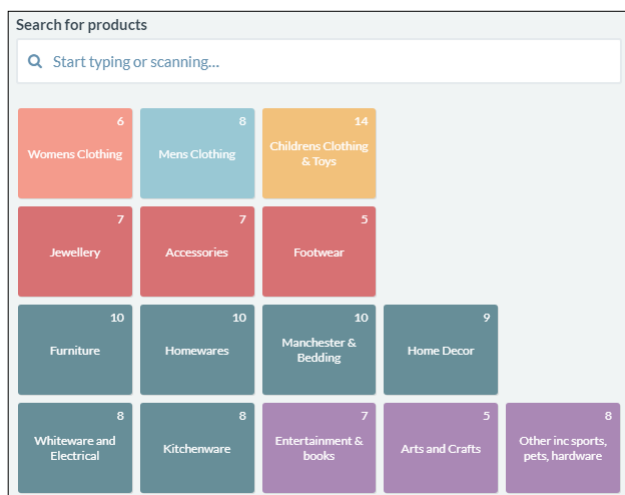
   If the item is clothing and it has fixed pricing, tap "High street". Otherwise, tap "Designer" and enter the price.

2. After the item has been added, tap it to change its quantity and/or price.
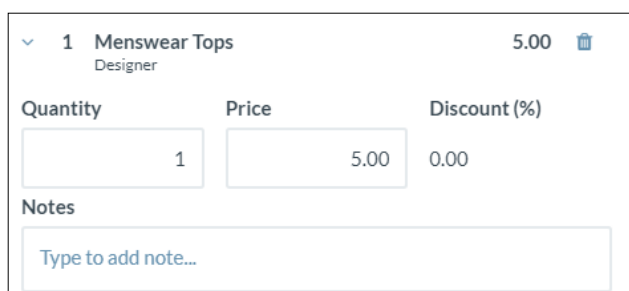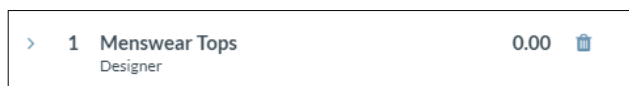
3. Repeat for every item in the sale.

   If there are similar items with the same price, put them together to save time. E.g. if a customer is buying two $3 books, use one item instead of two.


4. Tap "Pay".

5. Ask the customer how they're paying.

   If it's cash, you can enter the amount they're paying with next to "Amount to Pay". This will calculate the change.
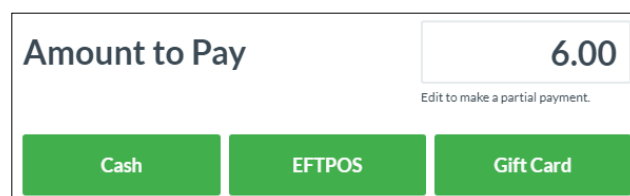
   CASH – the screen will go to "Payment Received".

   EFTPOS – the transaction will transfer to the terminal.

   Gift Card – see 15. Gift Cards.

6. Tap "Complete Sale". This will open up the cash drawer and print a receipt.

6. Splitting a Payment

The customer may want to pay for the sale partially with cash and the rest with EFTPOS (or vice versa).

1. Process the sale as usual. Tap "Pay".

2. Next to "Amount to Pay", enter the customer's desired amount and the payment method.

Amount to Pay	3
	$3.00 left to pay.
Cash	EFTPOS	Gift Card

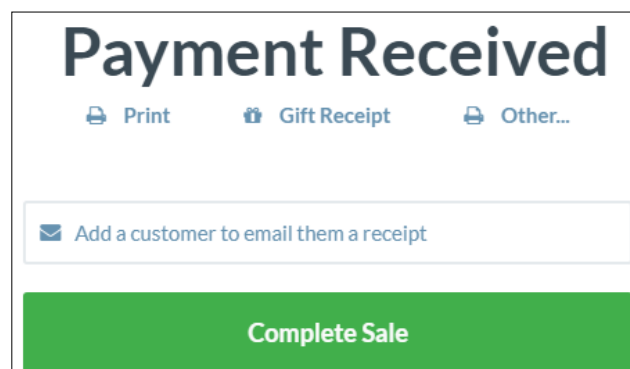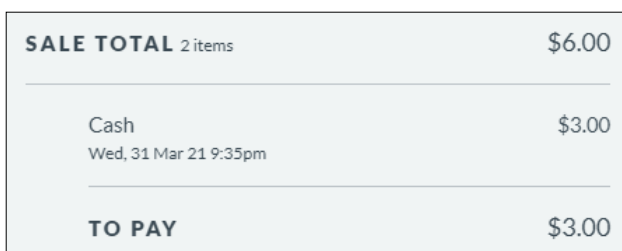3. The screen will not change but will tell you how much the customer has left to pay.

SALE TOTAL 2 items	$6.00
Cash Wed, 31 Mar 21 9:35pm	$3.00
TO PAY	$3.00

The customer could finish the payments with EFTPOS or even with cash again.

4. Continue until the sale completes.

7. WINZ SALES

7a. WINZ Sales - Processing

Work and Income New Zealand (WINZ) payment cards are similar to EFTPOS cards but are preloaded with money.

1. Process the sale as usual and tap "EFTPOS" for the payment method.

2. The customer swipes their card on the terminal. They select the CHQ option.

3. The customer enters the last 4 digits of the card as the PIN.

4. The terminal will print the receipt which needs to be signed by the customer.

5. Compare the receipt's signature to the one on the back of the card. If they match, approve the transaction on the terminal.

6. Keep this EFTPOS receipt for 30 days (in the cash drawer). Give the customer their Vend receipt so they can verify their purchase.

7b. WINZ Sales – Troubleshooting

If a WINZ sale fails, repeat it and check with the customer that:
1. CHQ is being selected.
2. The PIN is being entered correctly (last 4 digits of card).
3. The card has enough money.
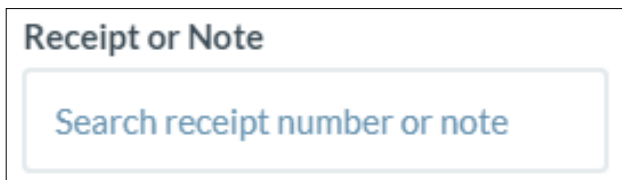
If it still fails, contact retail@marypotter.org.nz.

8. Refunding

The customer may want to refund an item(s). They will need their receipt and a valid reason e.g. faulty electrical item.
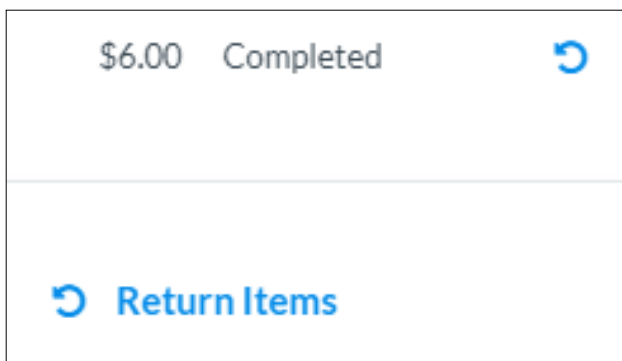
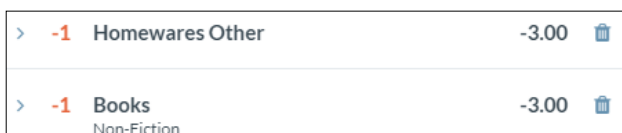1. Tap "Sales History" under "Sell".

2. If the sale was recent, you can find it by scrolling down. Or enter the receipt's number under "Receipt or Note".

3. Once the sale has been found, tap on it. Then tap "Return Items".

4. Tap "Skip". If the sale has multiple items, remove all items that **aren't being returned**. Below, the customer is only returning the hardware.

5. Tap "Refund".

6. Tap the desired refund amount. If the refund amount is higher than $10 or $20, then choose EFTPOS as cash is limited.
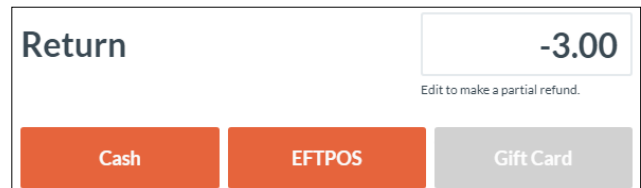
Cash - the cash drawer will open. Give the correct amount to the customer.

EFTPOS – the terminal will prompt you to swipe your merchant refund card. Enter the PIN of 1111. The terminal will then ask for the customer's card to be swiped or tapped.

7. If you have lost your refund card, please contact Paymark on 0800 729 627 to arrange for a replacement.

9. Parking a Sale

Park a sale when the customer has items they want to buy but are still browsing.
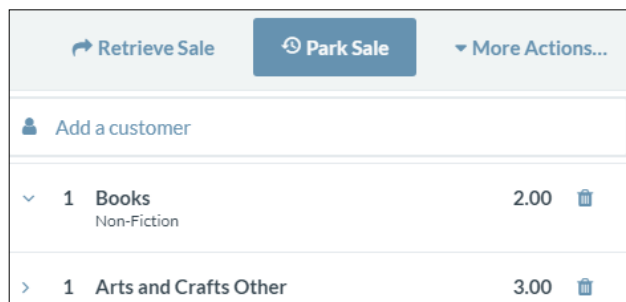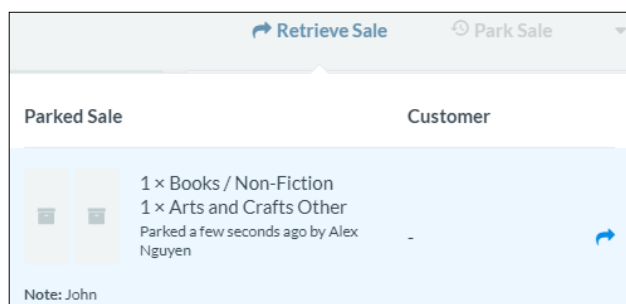
1. Tap "Park Sale".

2. Enter a note to identify the sale e.g. the customer's name. Tap "Park Sale".

10. Retrieving a Sale

1. Tap "Retrieve Sale".

2. Tap the sale you want to retrieve.

3. The sale will appear again. Sales can be re-parked; the previous note entered will remain.

11. Discarding a Sale

1. Tap "More Actions" then "Discard Sale".
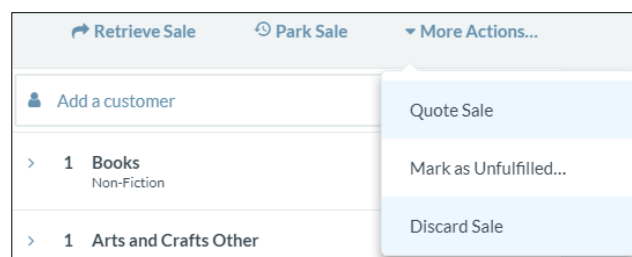
12. Quoting a Sale

1. Tap "More Actions" then "Quote Sale".
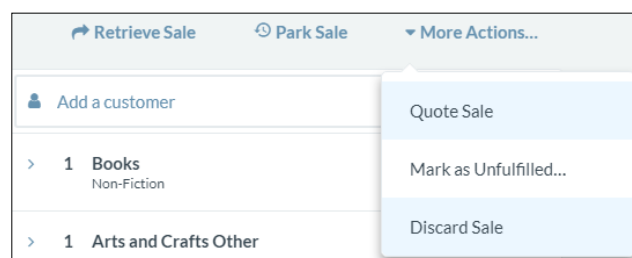
2. Enter a note such as the person's name and what the sale is for. Tap "Quote".

3. Tap "Complete Sale". This will print the quoted sale for the customer.

If the sale was previously parked, it will still be parked after completing the quote.

13. Taking Cash In or Out

There may be a need to add or remove cash.
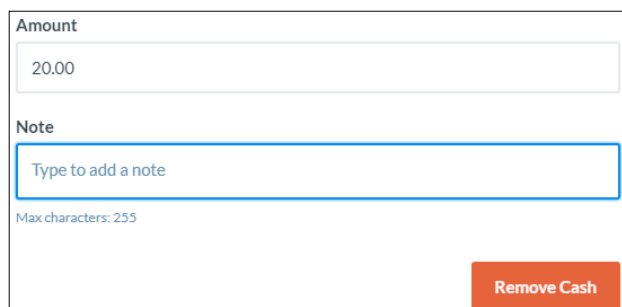
1. Tap "Cash Management".
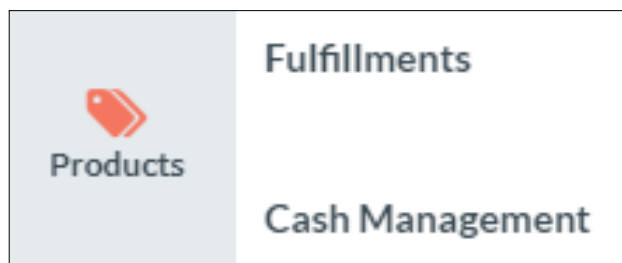
2. Tap "Remove Cash" or "Add Cash".
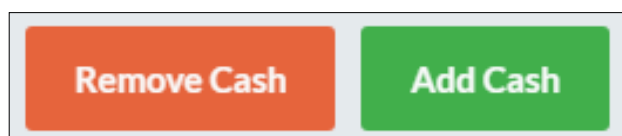
3. Enter the amount and a note. Tap "Remove Cash" (or "Add Cash").

The cash change will now be displayed.

14. View Store Reports

Vend has several reporting features.

Revenue Totals
Tap "Home" under Menu in the top left.
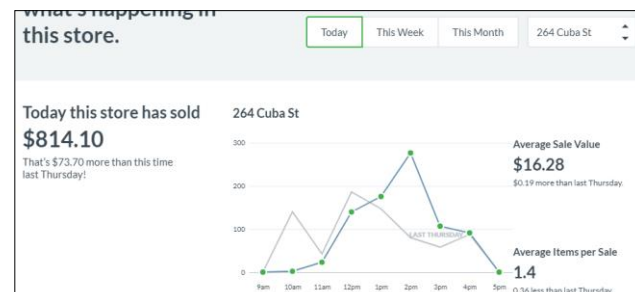
General Reporting
Tap "Reporting" under Menu. You can view sales counts, filter by date range or period.
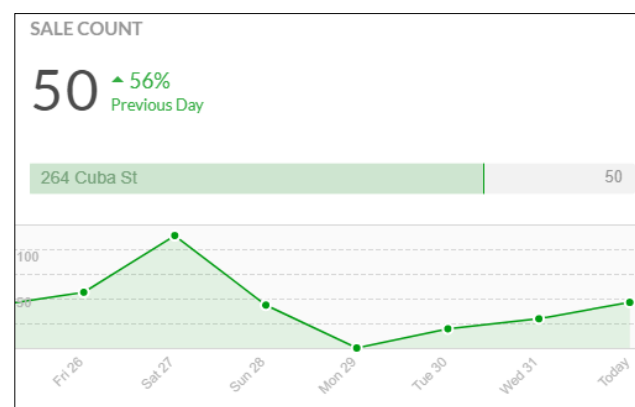
Best Selling Products
Tap "Sales Reports" under Reporting. Under Report Type, tap "Product".
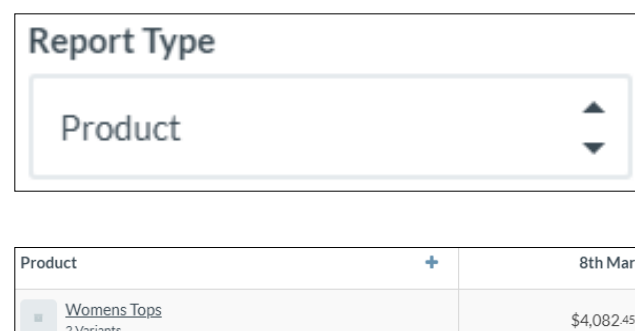
If you want to find certain reports, contact retail@marypotter.org.nz.

15. GIFT CARDS

15a. Gift Cards – Selling

1. Tap "Buy Gift Card". Each costs $5.

   Skip to Step 2 if you are re-topping up a gift card.

2. Tap "Top Up Gift Card".
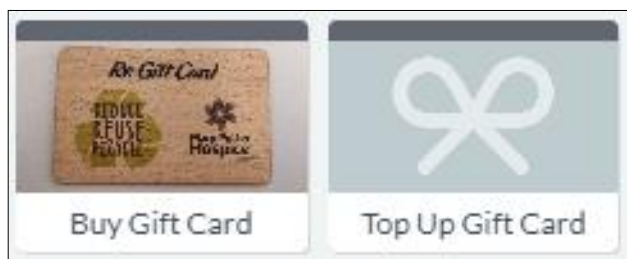
3. Scan the gift card's barcode with the scanner by pressing its button.

   If the gift card has already been activated, tap "Add Funds to Gift Card".

4. Enter the customer's desired amount and tap "Add to sale".

Repeat Steps 1 - 4 for any additional cards.

5. If the customer is buying other items, add them as normal, and tap "Pay" to finish.

6. Once the sale has been completed, give the gift card to the customer and the receipt.

   Please tell the customer to register their gift card using the link printed on the bottom of their receipt.

15b. Gift Cards - Redeeming

1. Ask the customer how much they would like to pay with their gift card.

2. Go to the Pay screen and tap "Gift Card".

Amount to Pay	7.00
	Edit to make a partial payment.
Cash	EFTPOS	Gift Card

If the amount is lower than the total, enter the amount next to "Amount to Pay".

Then tap cash or EFTPOS so they can pay the rest.
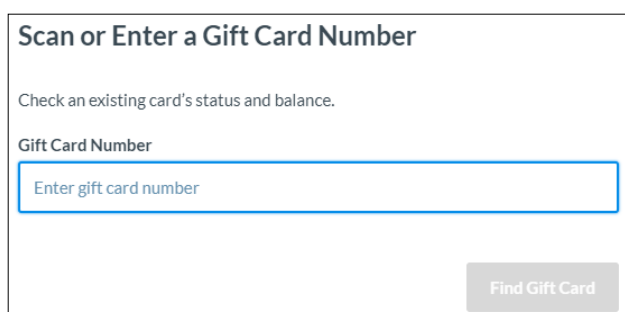
Amount to Pay	5.00
	$2.00 left to pay.
Cash	EFTPOS	Gift Card

3. Scan the barcode on the back of the gift card.

Scan or Enter a Gift Card Number
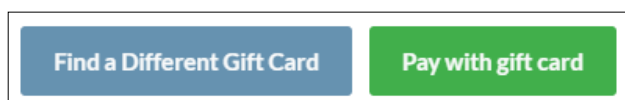
Check an existing card's status and balance.

Gift Card Number

Enter gift card number

Find Gift Card

4. Confirm by tapping "Pay with gift card".

Find a Different Gift Card | Pay with gift card

15c. Gift Cards – Troubleshooting

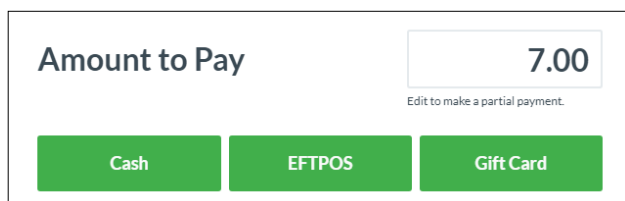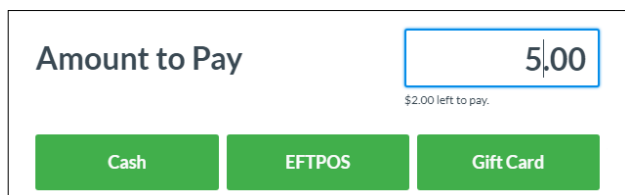**Checking gift card balance**
1. Follow the steps for topping up gift cards and close the menu when done.
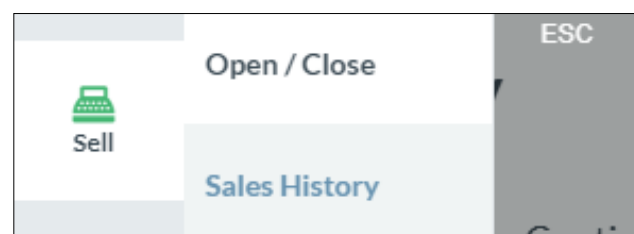
"Gift card not activated" error
1. Check that the code on the screen matches the one on the card. If the error occurs again, then the gift card isn't activated.

Voiding a gift card sale
1. This will return any spent amounts to the gift card. Tap "Sales History".
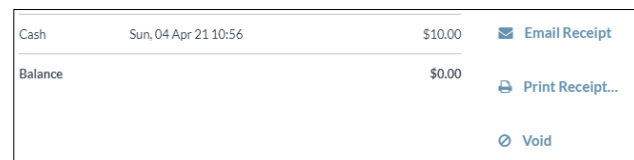
	Open / Close	ESC
Sell	Sales History	

2. Locate the sale, tap on it and tap "Void".
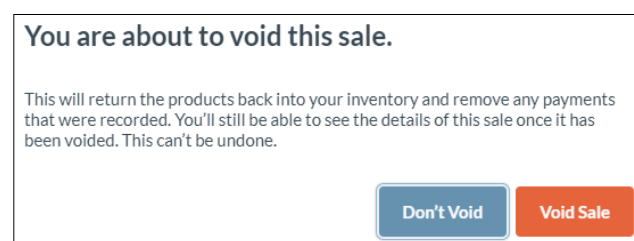
Cash	Sun, 04 Apr 21 10:56	$10.00	✉ Email Receipt
Balance		$0.00	🖨 Print Receipt...
			⊘ Void

3. Tap "Void Sale".

You are about to void this sale.

This will return the products back into your inventory and remove any payments that were recorded. You'll still be able to see the details of this sale once it has been voided. This can't be undone.

Don't Void | Void Sale

Scanner doesn't work
1. Make sure the scanner is plugged in to the POS. If the scanner is still malfunctioning, contact retail@marypotter.org.nz. You can still type in the gift card number manually.

16. BASIC TROUBLESHOOTING

16a. Cash Drawer Won't Open

1. With Vend open, try the CTRL + E keyboard shortcut to manually open it.

2. Check if there is paper in the printer (orange light means no paper).

3. Check if the printer is on (blue light).

4. Check all cables are connected to/from the cash drawer, printer, and POS.

5. Check if the cash drawer is locked (keyhole should be vertical).

16b. Vend Won't Load or Work

If Vend doesn't function as it should, try resetting its data or web browser cache.

1. In Menu, tap "Status" under the Sell tab.

2. Tap "Reset Data".

We keep a copy of some of your store data in your can help if you're having trouble with Vend.

Reset Data

3. Clear the cache by pressing CTRL + SHIFT + DEL together on the keyboard.

4. Tap "Clear data". This will sign you out.

☑ Passwords and other sign-in data
None

Autofill form data

Cancel   **Clear data**

16c. Vend is Offline

1. If the store's Internet is down, you will only be able to do cash sales.

2. For EFTPOS sales, operate in Offline Mode (17. EFTPOS Troubleshooting).

3. Vend checks for connectivity every 2 minutes. You can force a recheck by reloading the page (tap ↻).

↻ 🔒 marypotterhospice.vendhq.com/webregister/

16d. Internet Is Down

1. To verify, open a new browser tab and load google.co.nz. If your phone is connected via Wi-Fi, try browsing the web.

2. Power cycle the Vodafone router (grey box) and ONT modem (white box).

3. Call Vodafone on 0800 400 888 if the Internet is still down after 5 minutes.

16e. POS Computer Issues

1. If the POS computer doesn't function as it should, restart it.

   If restarting through the button doesn't work, power cycle at the plug or switch.

16f. IT Support

1. If you are experiencing any issues that you are unable to solve immediately, call IT Support on 021 957 349.

17. EFTPOS TROUBLESHOOTING

17a. Restart the Terminal

1. Hold the red X button until the display turns off. Repeat to turn it back on. Do this if your terminal is having issues.

2. Press the ALPHA button and "1" for LOGON. If the printout says "offline", call Smartpay on 0800 476 278.

17b. Switching Connection

By default, your terminal connects online via SIM card. If there are mobile network issues, transactions can fail.

1. You can switch the terminal to use the store's Wi-Fi. To do this, call Smartpay.

   You will need the Wi-Fi password - first 4 letters of store name and 1234. E.g. Cuba1234 or Karo1234.

17c. Offline Mode

If your terminal is offline, then you can do offline transactions. It will **take 2 failed transactions** for them to work.

1. Press the red X button, and press 2 for Paymark EFTPOS.

2. Press 1 for PURCHASE.
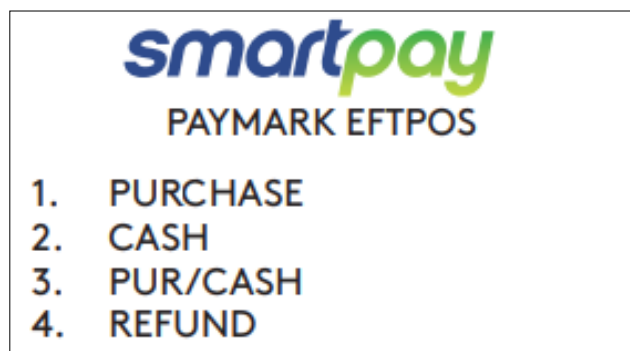
All offline sales require the customer to sign the receipt. Keep this receipt for at least 30 days (in the cash drawer).

17d. Changing Paper

1. With the keypad facing you, put your fingers in the opening of the paper cover and pull it towards you to open it.

2. Swap the empty roll with a new roll. Make sure the roll is opened to come out from underneath.

3. Close the cover and tear excess paper.

17e. Settlements / Closing

1. To settle for the day, access the main menu (in Paymark EFTPOS mode). Then MERCHANT > ADMIN.

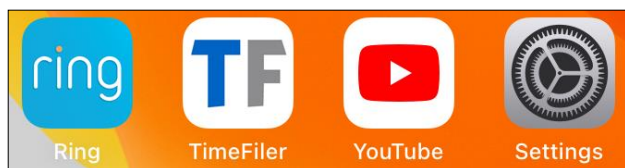2. Press the key for SETTLE CUTOVER or SETTLE INQUIRY.

17f. Other issues

1. If you are experiencing consistent issues with your terminal, please call Smartpay. Issues could be charging or freezing.
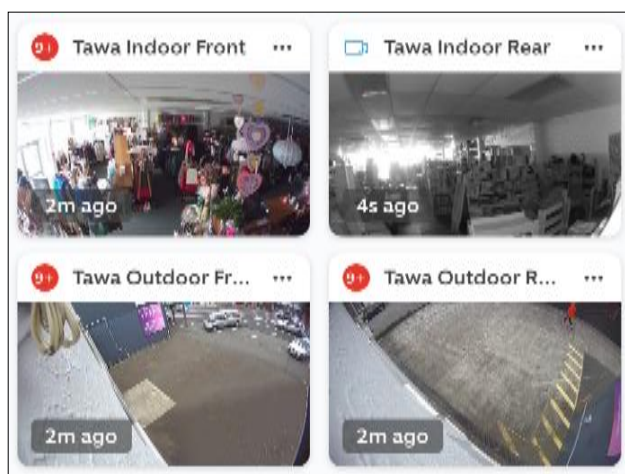
18. RING

18a. Viewing Live Feed

1. Open the Ring app.

2. Tap on one of the cameras to open it.

If the camera runs on a battery, you will see a bar in the top right which can be tapped to see its battery level.
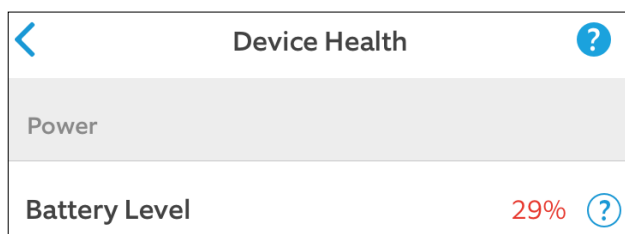
3. Tap on "LIVE VIEW" to view the camera's live feed. This can take up to 10 seconds.

You will see various options available.

 - End the live view.

 - Access microphone.

 - Mute or unmute the microphone to speak through the camera.

 - Mute or unmute the sound.

 - Access the siren.

 - Turn on siren. Tap again to turn off.

18b. Viewing Recorded Footage

1. Open the camera. Tap "Event History".

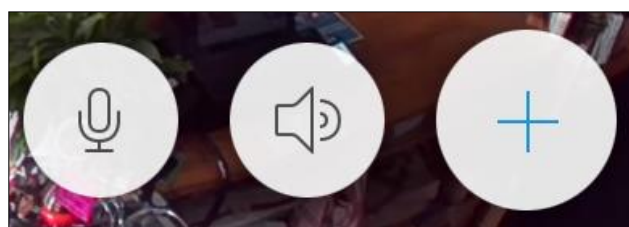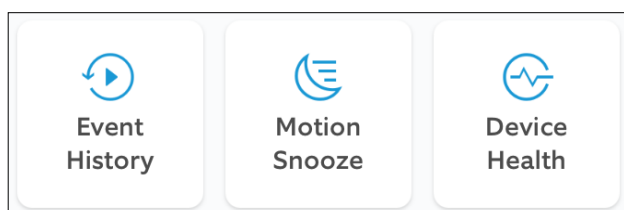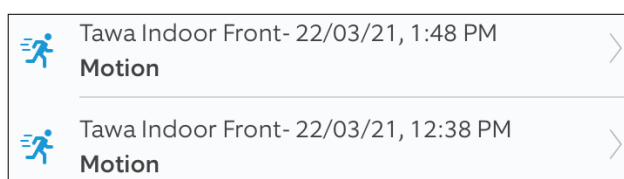Event History | Motion Snooze | Device Health

2. You will see a list of available footage. Tap one to start viewing.

Tawa Indoor Front- 22/03/21, 1:48 PM
Motion

Tawa Indoor Front- 22/03/21, 12:38 PM
Motion

Tap "Done" to exit.

Done   0:01 ●——————— -0:29

Done - Exit the footage.

0:01 ● - Scroll through the footage.

◀◀ - Play the previous footage.

▶ - Play or pause the footage.

▶▶ - Play the next footage.

●— - Adjust the footage volume.

⬆ - Share the footage.

Right Column

Sharing will enable anyone with this link to view its content.
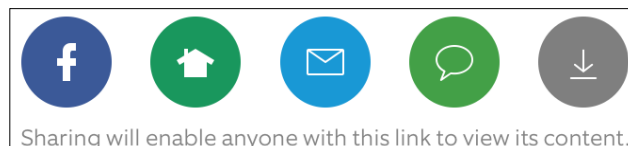
- Share via Facebook.

- Share via email.

- Share via text message.

- Download the footage locally.

18c. Motion Alerts

Motion alerts will alert you with a notification when motion is detected.

1. Open the camera to set motion alerts for. Tap "MOTION ALERTS".

MOTION ALERTS

18d. Changing Indoor Battery

1. Check if the battery needs to be changed in the Ring app.

2. Search on YouTube "Ring indoor charge" for an instructional video.

18e. Support

If you have issues with using the app, there is a camera issue or you want to report an incident, contact retail@marypotter.org.nz.
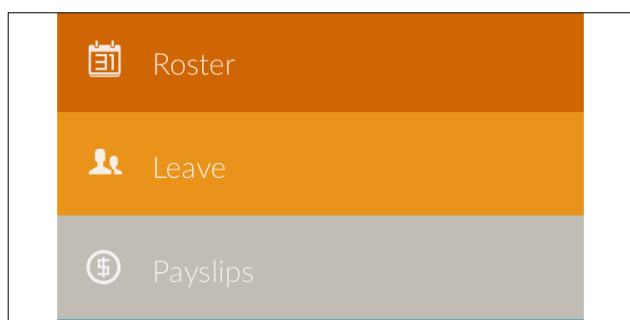
19. TIMEFILER

19a. TimeFiler – Apply for Leave

1. Open up the TimeFiler app on your work iPhone or iPad. If you are not logged in and don't know your ID and password, contact accounts@marypotter.org.nz.
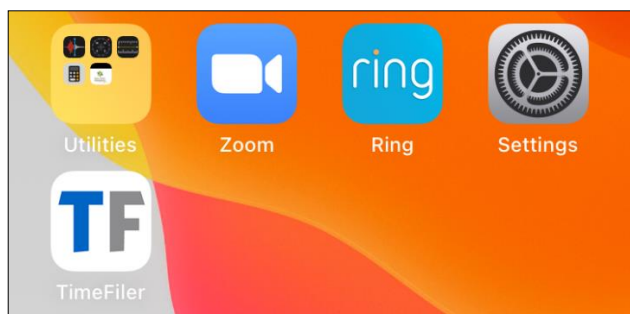
2. Tap "Leave", then "Create".

3. Enter the reason for the leave, the start and end dates, and then "Submit". Your leave will need to be approved by your retail manager - you'll be notified by email.

Cancel	**Leave**	Submit
CREATE LEAVE	(UNSUBMITTED)	
Reason	Annual Leave	
Start Date	22/03/2021	
End Date	26/03/2021	

19b. TimeFiler - Setup

1. Install the TimeFiler app from the Catalog app on your iPhone or iPad, or from the app store. Open it.

2. Tap "Create Profile".

Welcome to TimeFiler Mobile

To use this Mobile App you must be an existing TimeFiler user.

Please enter your TimeFiler login credentials to get started.

Create Profile

3. Tap next to "Subdomain". Type in "marypotter".

Cancel	**Profile**	Next
Subdomain	marypotter	

4. Enter your ID (next to Username) and your password. If you need to reset your password, contact accounts@marypotter.org.nz.

Cancel	**Profile**	Next
Username	touch here...	
Password		

5. Enter a 4 digit PIN. Tap "Next", then "Finish". If you forget your PIN, you will need to delete the app, and setup your account again.

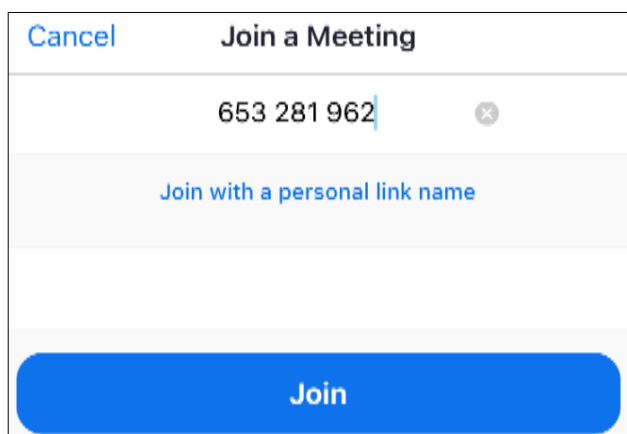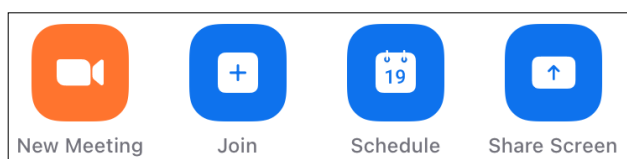| Cancel	**Profile**	Next
PIN (4 digits)	••••	

20. ZOOM

20a. Join Zoom Meeting
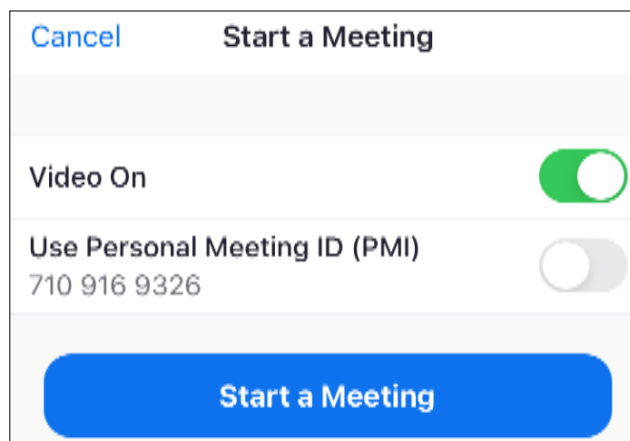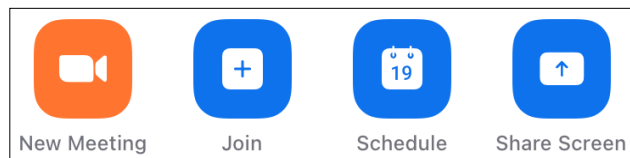
1. Open the Zoom app.

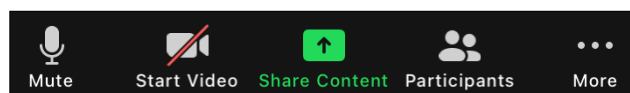2. Tap "Join". Enter the given meeting ID and tap "Join".

If you were sent an invitation email to join a meeting, tap the link in that email instead.
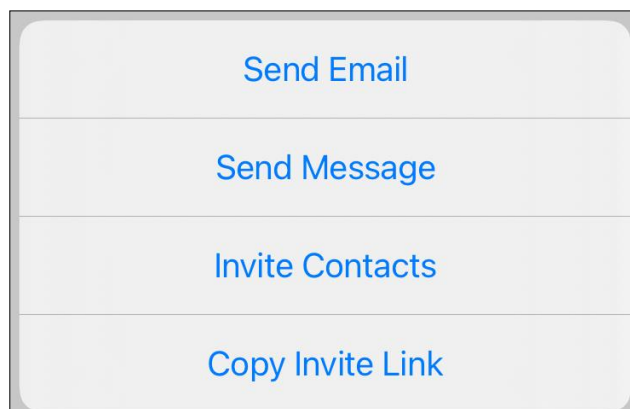
20b. Create Zoom Meeting

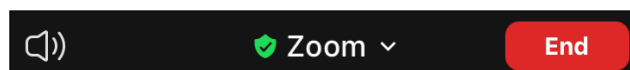1. Tap "New Meeting". Then tap "Start a Meeting".

2. Tap "Call using Internet Audio" if prompted. To enable video, tap "Start Video". To mute yourself, tap "Mute".

3. To invite people, tap "Participants". Tap "Invite" for a number of options.

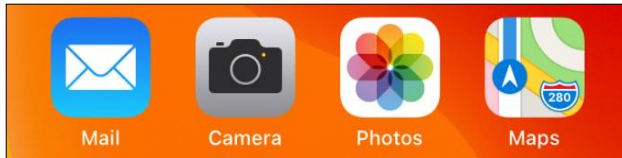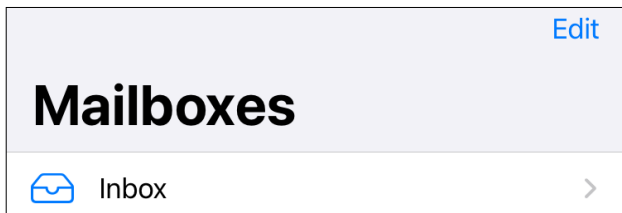4. To end the meeting, tap the red "End".

21. EMAILS

21a. Emails - Reading

1. To read your emails, tap the Mail app.

2. Tap "Inbox". If you have more than one email account on your device, tap the Inbox you want to open.
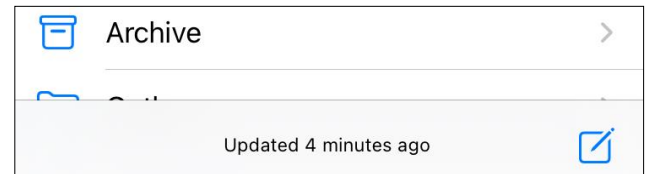

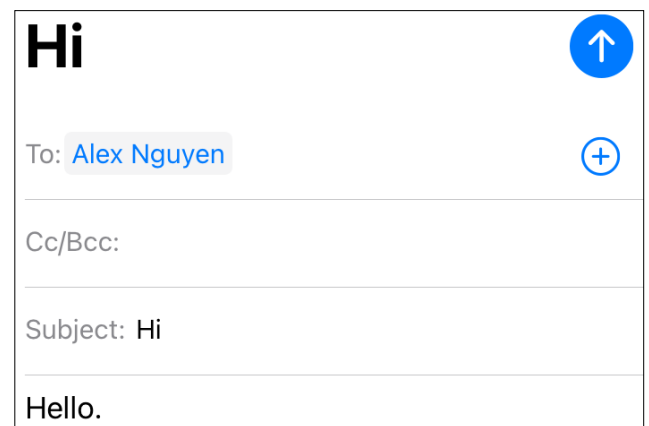3. Tap any email to open it. To go back, tap
"< Mailboxes".

21b. Emails - Writing

1. To write a new email, tap the icon in the bottom right corner.
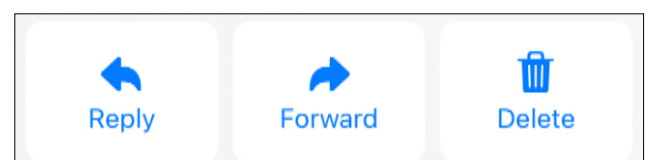

2. Enter your desired recipient next to "To:". If you need to enter an email address from a contact, tap the + icon.

3. After finishing your email, tap the ↑ icon to send it.

4. To reply to an email, open it and tap the arrow at the bottom. Here you can also forward (which works the same as a reply) or delete the email. Tap "Reply".

22. GENERAL

22a. Messaging

1. Open the "Messages" app.

2. To create a new message, tap the top right icon. Otherwise, tap the message you want to reply to (and skip to step 4).

3. Enter the desired phone number, or select a contact using the + icon.

To: 0211111111   (+)

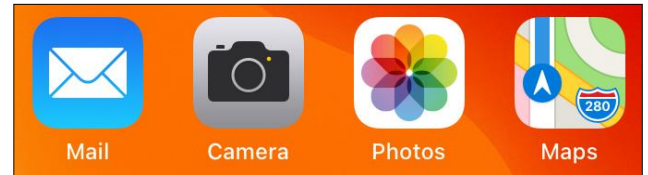4. Enter your message and tap the arrow icon to send it.

5. If you want to send a photo, tap the camera icon to take one. If you want to send an existing photo, tap the top left icon.
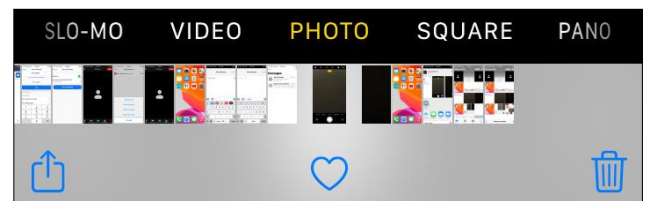

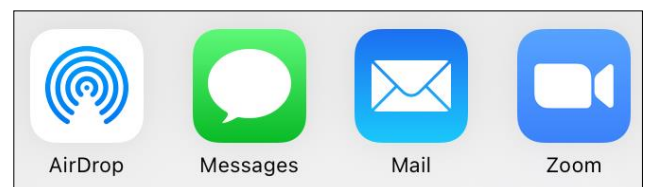## 22b. Sending Photos or Videos

1. Open the Photos app. Tap your desired photo or video.
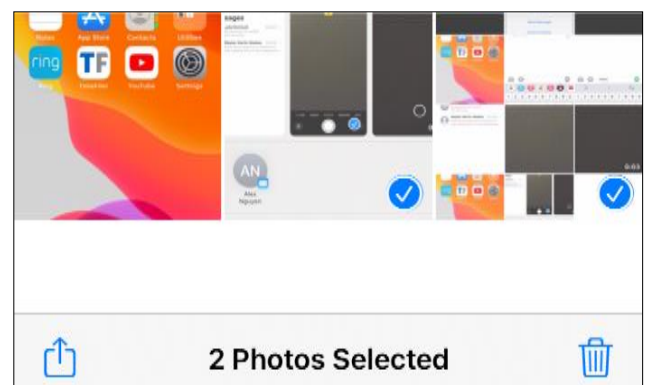

2. Tap the bottom left icon.

3. You can choose to send it by text message or email. You may be asked which size to use; if the quality of the photo doesn't matter, a smaller size will be easier to send and download.


4. If you want to select multiple photos/videos, tap "Select" in the top right corner, select the desired content, then tap the bottom left icon.

2 Photos Selected

22c. Check Payslips

Your payslips are emailed to you. If they aren't, contact accounts@marypotter.org.nz.

1. Login to datacomdirectaccess.co.nz. Enter your username (email address from above) and password. Tap "Login" then "View Payslip".

UNTIL YOUR NEXT
PAY DAY
24 MARCH 2021
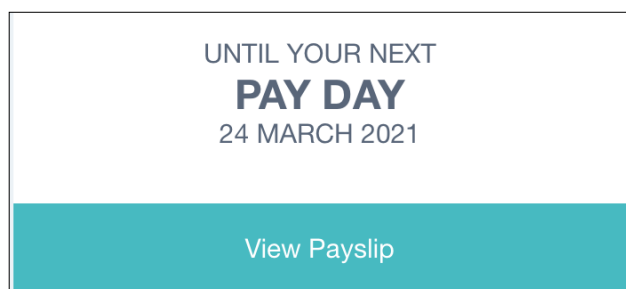
View Payslip

2. If you want a specific payslip emailed, tap the envelope icon next to it.

To download a payslip, tick them and tap the envelope in the top right.

To view an older period, tap the < icon.

My Payslips

Quarter 1

01 Jan 2021 - 31 Mar 2021

07/03/2021
GROSS
DEDUCTIONS
NET
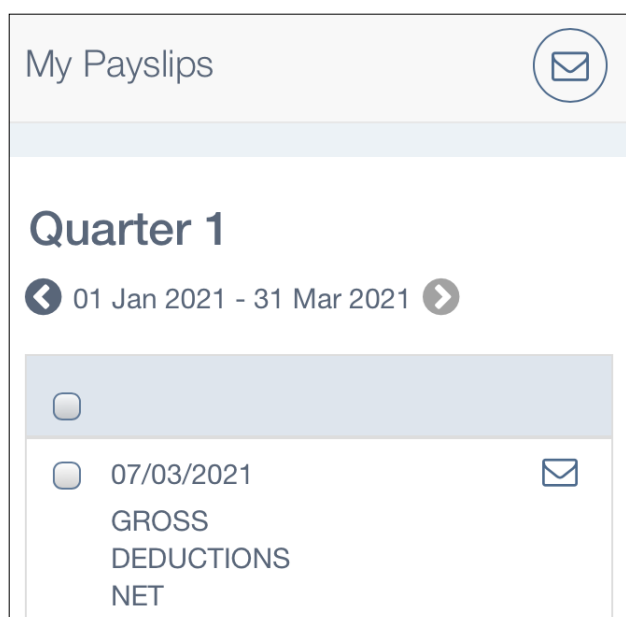
If you need to reset your password, tap "Forgot Password?".

22d. Passwords

1. Passwords should include a combination of letters (including uppercase), numbers, and special characters (like ! or @).

2. Do not give your password to anyone else.

3. Avoid writing your password down. Initially you may need to until you commit the password to memory but at least keep it in a secure place.

4. These recommendations should also apply to PIN codes for mobile devices. 1234 is not a secure PIN. 9816 is more secure.