Cloud EFTPOS

GETTING STARTED GUIDE

791-0007-02

Donation Point™ TAP

CONTENTS

OVERVIEW

Cloud EFTPOS allows you to effectively monitor and manage your Donation Point Tap devices. Key features allow you to provide transactional history, monitor device health status, as well as allowing pre-set donation amounts to be changed at any time remotely.

Management tools such as terminal grouping and naming individual devices allow for effective campaign management, without ever having to leave the office.

This user guide will show you how to use the tools within Cloud EFTPOS to ensure you are getting the most out of your Donation Point Tap devices.

CONFIGURING YOUR DEVICE

Cloud EFTPOS allows you to configure and manage your Donation Point Tap devices. You can name Donation Point Tap devices, set donation values and create terminal groups.

1. Go to https://mel.cloudeftpos.com and login to your account using the credentials provided to you by Quest.
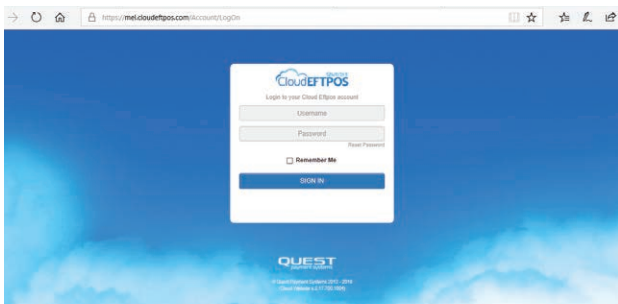
2. In order to view and manage your Donation Point Tap devices you will need to select 'PAYMENT TERMINALS' from the top menu, then select 'ALL PAYMENT TERMINALS' from the dropdown menu.
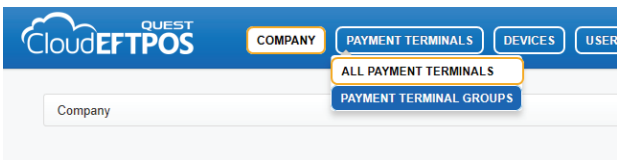
From this page you can now see all of your Donation Point Tap terminals linked to your Cloud EFTPOS account.

3. You can indentify terminals via the serial number which can be located in the second column from the left and this will be physically labelled on the base of your Donation Point Tap terminal.

Serial number

4. Once you have found the terminal you need, click 'Edit' to see the devices current configuration.

Payment Terminals

							Q Search	Go
Name	Serial No.	Bank	Merchant ID	Terminal ID	Group	Refund Code	Actions	
	2700XXXX					Not Set	Edit Block Configuration	
	2700XXXX					Not Set	Edit Block Configuration	

5. On this page you can re-name your device and alter the device donation amount.

See next page for details on how to change these amounts.

Select 'Save' at the bottom of the page to confirm changes.

ℹ️ *Merchant ID and Terminal ID information is set by Quest.*

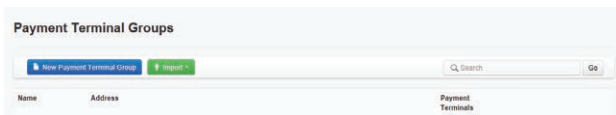*Please do not change without assistance from Quest*

CONFIGURE GROUPS

Create groups of Donation Point Tap terminals within Cloud EFTPOS for reporting and management purposes. E.g. State based group, store/campaign based group, etc.

1. If you have more than one unit you may wish to group your Donation Point Tap devices into separate categories.

   To setup a new group, select 'Payment Terminals' from the top menu, then select 'Payment Terminal Groups'.
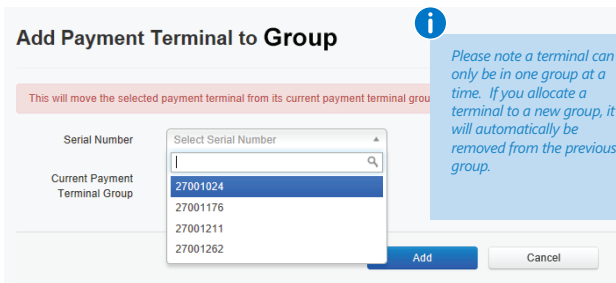
   To create a new group, select 'New Payment Terminal Group'.

2. You will now need to fill out the group details.
   From this view you can pre-select the donation value for the group. This allows you to remotely update all devices collectively within the group instead of updating each individual unit.

   Once you are happy with your group setup, select 'Save' at the bottom of the page.

3. Select 'Add Payment Terminal to Group' from the bottom of the page.

4. You will now need to find the terminal's serial number from the available dropdown box.

Please note a terminal can only be in one group at a time. If you allocate a terminal to a new group, it will automatically be removed from the previous group.

CONFIGURE GROUPS

5. Once saved, you will return to the payment terminal groups page and see your new group. On this page you will see how many terminals have been assigned to each group. To add new terminals to a group, you will need to select 'View Details'.
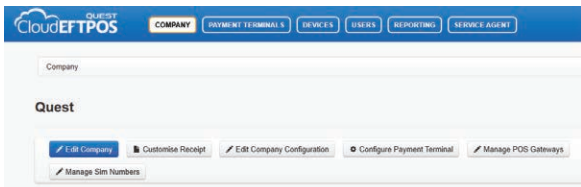
CONFIGURE AMOUNTS

You can configure donation amounts at a company level, a payment terminal group level or a terminal level.

COMPANY LEVEL

1. To configure the Donation amounts at a company level, select 'Company' from the top menu, then select 'Edit Company'.

2. In the 'Edit Company' page there is a field labelled 'Default Tap Amount'. Update this field with the desired amount, then click 'Save' at the bottom of the page.

This change will affect any DPT that does not have a donation amount configured at another level.

CONFIGURE AMOUNTS

PAYMENT TERMINAL GROUP LEVEL

1. To configure the donation amount at a group level, click on 'PAYMENT TERMINALS' at the top menu then select 'PAYMENT TERMINAL GROUPS'

2. Once in the 'PAYMENT TERMINAL GROUPS' page click on 'View Details' for the group you would like to change.

3. Once at the group level click on 'Edit Payment Terminal Group' and add a default donation tap amount, click 'Save' at the bottom of the page to confirm any changes made.
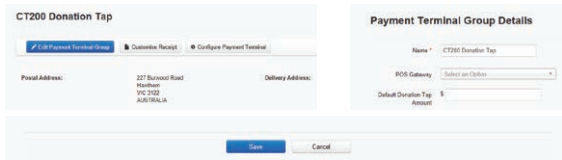
This change will affect any payment terminal in the group that does not have an amount configured at the Payment Terminal Level.

CONFIGURE AMOUNTS

INDIVIDUAL PAYMENT TERMINAL

1. To change an individual DPT's amount, click on 'PAYMENT TERMINALS' at the top menu and then click 'ALL PAYMENT TERMINALS'
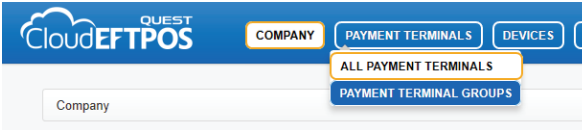
2. Find the payment terminal you would like to update and click 'Edit'

3. Once in the menu, add a default donation tap amount and click 'Save'

This will affect this device only, no changes at higher group levels will change the amount on the device until it has been removed at the Payment Terminal Level.

ADD USERS TO ACCOUNT

Create users for your Cloud EFTPOS account and manage their permissions.

1. On your Cloud EFTPOS home page, select 'USERS' from the top menu. This will bring you to the users home page.

2. Click 'Add New User'
Complete the new user information as desired.

Add New User

Username *	
First name	
Last name	
Email *	
Comment	

Password ⓘ

Password *	
Confirm Password *	

Permissions ⓘ

Groups and Stores	Select Some Options
Roles	Select an Option ▼

Save   Cancel

3. If applicable, select 'Groups and Stores' for the user to be assigned to.
Select 'Roles' for the new user:

Admin: Total access to Cloud
View Reports: Access only to reporting features of cloud for reconciliation purposes
Service Agent: N/A - this is for customers with other products
Commission: N/A - this is for customers with other products

4. Click 'Save' to confirm these details.

LOGO PERSONALISATION

Quest Support can arrange for your organisations logo to be loaded into your Cloud EFTPOS account.

This allows you to select a unique logo to display on the screen of your Donation Point Tap devices.

Please email your logo request to: **support@questps.com.au**

1. Each of your DPT devices can display a logo of your choosing. To have your logo uploaded to your device(s), please supply the logo in the size and file format below to Quest Support.

   You will need to indicate which devices (determined by the serial number) are to have which logo if you are supplying different versions.

2. Logo File Specifications:

   Size: 240(w) x 320(h)pixels
   File: 16 bit-depth colour BMP file

240px

320px

Please
Donate

Your Logo
goes here

QUEST

ⓘ *Quest recommends the use of logos suited to portrait format and to avoid the use of small text.*

See examples below

DPT Logo Examples

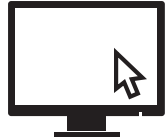

✅
Good size
Readable text

❌
Avoid small,
horizontal logos

❌
Avoid images
Avoid small text

ONLINE REPORTING

Information on the donations received by your Donation Point devices are available to you via the online portal.

Select 'Reporting' from the top menu. This will bring you to the reporting home page.

TRANSACTIONS REPORT

Gain an overview of your transactions on a timeline graph.

I. By selecting the 'Transactions' report icon you will be taken to the historical transaction reporting page.

Here you can select a date range to display a chart of your transactions. This is also broken down to card type beneath the graph

Reporting / Transaction Reporting 03/12/2018 to 10/12/2018 / Transaction Overview Report

Date From	Date To	Report Type	
03/12/2018	10/12/2018	Transaction Overview Report ⌄	↻ Update

Q Advanced Search

Transaction Overview (03/12/2018 - 10/12/2018)

Card Breakdown

◆ MasterCard ◆ Visa

	03/12/2018	04/12/2018	05/12/2018	06/12/2018	07/12/2018	08/12/2018	09/12/2018	10/12/2018
MasterCard Count	$0.00 0	$0.00 0	$0.00 0	$10.00 2	$5.00 1	$0.00 0	$0.00 0	$0.00 0
Visa Count	$5.00 1	$0.00 0	$0.00 0	$0.00 0	$5.00 1	$0.00 0	$5.00 1	$0.00 0
Total	$5.00	$0.00	$0.00	$10.00	$10.00	$0.00	$5.00	$0.00

2. To view a specific report type for a defined date range:
   • Input your 'Date From' and 'Date To' dates
   • Select the required report type from the drop down menu
   • Click 'Update'

3. By selecting 'Advanced Search' you can apply additional filters to the search and narrow down specific transaction details.
   You can select individual terminals by selecting 'Payment Terminal' or select terminal groups by selecting 'Payment Terminal Group'.

DETAILED TRANSACTION REPORT

A high level breakdown of historical transaction which can be exported in an Excel format.

I. The detailed transaction report allows you to view transaction history with extra details such as merchant and terminal ID's.

You can also use the print icon to send an email receipt.
You will need the donor to provide their email address for you in order to do this.

The export function creates a .CSV file with the data provided. This can be used to track your donations over time and save transaction details for accounting purposes.

Reporting / Transaction Reporting 03/12/2018 to 10/12/2018 / Detailed Transaction Report

Date From	Date To	Report Type	
03/12/2018	10/12/2018	Detailed Transaction Report ⌄	⟳ Update

☐ Include location information in report

🔍 Advanced Search

Detailed Transaction Report (03/12/2018 - 10/12/2018)

⬇ Export

	Trans. Date Time	Merchant ID	Terminal ID	Serial	Card	RC	Amount	Tip	Surcharge	Cashout	Total	
✔	09/12/2018 10:16:39	61100016215UT0	18475004	27001877	Visa	00	$5.00	$0.00	$0.00	$0.00	$5.00	🖨
✔	07/12/2018 20:17:19	61100016215UT0	18475001	27001566	Visa	00	$5.00	$0.00	$0.00	$0.00	$5.00	🖨
✔	07/12/2018 11:05:42	61100016215UT0	18475004	27001877	MC	00	$5.00	$0.00	$0.00	$0.00	$5.00	🖨
✔	06/12/2018 14:41:33	61100016215UT0	18475004	27001877	MC	00	$5.00	$0.00	$0.00	$0.00	$5.00	🖨
✔	06/12/2018 09:54:34	61100016215UT0	18475002	27001613	MC	00	$5.00	$0.00	$0.00	$0.00	$5.00	🖨
✔	03/12/2018 09:58:12	61100016215UT0	18475004	27001877	Visa	00	$5.00	$0.00	$0.00	$0.00	$5.00	🖨

2. Click 'Export' to export the data as a .CSV file.
.CSV files can be imported to most spreadsheet software programs.

Detailed Transaction Report (03/12/2018 - 10/12/2018)

⬇ Export

	Trans. Date Time	Merchant ID	Terminal ID	Serial	Card	RC	Amount	Tip	Surcharge	Cashout	Total	
✔	09/12/2018 10:16:39	61100016215UT0	18475004	27001877	Visa	00	$5.00	$0.00	$0.00	$0.00	$5.00	🖨

TRANSACTIONS STATISTICS REPORT

This report will detail what percentage of transactions have been approved or declined, as well as descriptors for all transactions so you can easily identify any issues such as SIM card issues or bank host errors. This overview is a great way to ensure your Donation Point Tap devices are working as intended, and identify any errors in the field.

I. Selecting 'Transaction Statistics Report' gives you the ability to monitor the number of transactions which have been approved, declined or have not been processed (other).

Once you have selected a date range, select 'Update' to view the data.

Each section can be maximised to understand why transactions may have declined or not been processed.

Reporting / Transaction Statistics report

Transaction Statistics Report

Date From	Date To
03/12/2018	10/12/2018
Store	Lane/ Payment Terminal
-- Please select store --	-- Please Select a payment terminal --	⟳ Update

☐ Approved	6	100 %	
☐ Declined	0	0 %	
☐ Other	0	0 %	

ⓘ *Any error codes which are numeric indicate that the bank has not been able to successfully process the transaction. Ask the customer for an alternative payment method.*

PINPAD HEALTH STATUS REPORT

An overview of all your terminals including when they last performed a transaction and connected to Quest's Cloud EFTPOS Server.

I. The PINpad health status report allows you to view your terminals 'Health Status'.

This report details the last time a transaction was performed by each terminal and the last 'Commission Request' (this is lodged each time the unit connects to the Cloud to check for any updates. i.e. firmware updates or configuration changes).

By changing the 'Check Health Within' field you will notice the health icon for each device will change depending on if your terminal has connected to Quest's Cloud EFTPOS server within the nominated time frame.

If a transaction was performed the icon will be green.
If it is not performed then the icon will be red.
You can use this feature to ensure your sites are performing and manage your fleet effectively.

PINpad Health Status Report

Check health within
Past 30 mins

Store
-- Please select store --

Lane/ Payment Terminal
-- Please Select a payment terminal --

Update

Do not include these serial numbers in report
-- Select Serial Number(s) --

Search   Go

PINpad serial number	Store	Lane	Health	Last Tx performed	Last Commission Request
27001423				11/30/2018 2:11:07 PM	12/2/2018 12:37:09 AM
27001832				11/28/2018 11:14:33 AM	12/10/2018 3:26:43 PM

FAQ'S

ACCESS TO CLOUD EFTPOS

Q: Where do I go to access Cloud EFTPOS?

A: Go to https://mel.cloudeftpos.com and login to your account using the credentials provided to you by Quest.

Q: Where do I get my login credentials?

A: These will be provided to you via email when your terminals are dispatched, If you have not received your login credentials please email **customercare@questps.com.au** to have them reissue your login credentials.

Q: How do I reset my password?

A: Go to https://mel.cloudeftpos.com and click the 'I've forgotten my password' link

Q: How do I add new users?

A: Please go to page 10 of this guide

DONATION AMOUNTS

Q: How do I set the donation amounts for my devices?

A: Please go to page 4 & 7 of this guide

Q: How many different amounts can there be?

A: The device displays just one amount, you can set it to any amount between $1.00 and $99.00 (in whole dollars only).

Q: How long does it take for the DPT to update with the new donation amount?

A: The DPT will commission to the cloud every hour and download any configuration changes during this period, including changes to donation amounts. If the donation amount needs to be updated quicker, then a reboot of the DPT will force it to commission on boot up and download the new configuration.

FAQ'S

POWER / BATTERY

Q: Does the DPT have an internal battery?

A: The Donation Point Tap does not have an internal battery, an external power source must be connected in order to function.

Q: How can I make it mobile?

A: If connected to a suitable power bank, the DPT can be used anywhere there is suitable 3G coverage (required for the transactions).

Q: What are the power bank requirements?

A: Quest recommends a power bank no smaller than 5000mAh. The power bank should have the following miniumum ratings: 5V (voltage) 2A (ampage).

REPORTING

Q: What do all of the report types do?

A: Please refer to pages 12-16 of this guide

SETTLEMENT TIMES

Q: When does settlement occur?

A: Donation Point Tap operates just like a traditional EFTPOS terminal. Funds will be settled by the acquiring bank at their predefined host settlement time each day, paid into your nominated bank account. Note that if your bank account is with a different financial institution, there may be an additional delay in funds reaching your account.

FAQ'S

SIM CARD

Q: Can I change the SIM card if we have bad mobile reception?
    What SIM cards can be used?
    How do I swap out the SIM card?

A: Please call Quest support for any SIM card related issues

WIFI

Q: Does the DPT work over Wi-Fi?

A: The Donation Point Tap is built to operate on the 3G network and is not WIFI compatible.

Need help with Donation Point Tap?
Please contact our support team.

✉ support@questps.com.au

☎ 1800 008 595 9am - 9pm, 7 days a week (Australian EST)

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