

# Merchant App Guide



CC Financial Services Pte Ltd

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# Company View Home Page Guide



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# Home Page - Company View

The 'Company View' home page will display the following:

- 1) Company Logo ( On the top left)
- 2) Selection of either company or store view (top middle pane of the home page)
- 3) Notification bell (On the top right)
- 4) 'Total Orders', 'Daily' and 'Monthly' transactions, and
- 5) For further transaction information, click on the right navigation arrow
- A detailed dashboard will be displayed for:
  - ❖ 'Revenue' and 'Order Volume' in 'Last 7 Days/ 30 days/ 1 Year'
  - ❖ Transactions by 'Payment Method'
- 6) Status for 'Online Orders', Inventory for 'Product', 'Voucher' validity, 'Payment Activation'.



# Home Page - Company View

- Shortcut at the bottom pane displays the following:
  - Payment
  - Store selection
  - Home
  - 'My Page' (Company details)
  - History



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# Store View Home Page Guide



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# Home Page Store View

The home page will display the following:

- 1) Company Logo (On the top left).
- 2) Selection of company or store view (Top middle pane of the home page).
- 3) Notification bell (On the top right).
- 4) 'Total Orders', 'Daily' and 'Monthly' transactions, and
- 5) For further transaction information, click on the right navigation arrow.
  - A detailed dashboard will be displayed for:
    - 'Revenue' and 'Order Volume' for 'Last 7 Days/ 30 days/ 1 Year'.
    - Transactions by 'Payment Method'.
- 6) Buttons to access 'Offline Orders', 'Online Orders', 'Product', 'My Online Store' and 'Voucher' functionalities.



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# Login Guide



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# Login

- 1) After registration, click on 'Back To Login Page'.
- 2) Login with the following details:
  - Enter the registered 'Mobile Number' and 'Password'.
  - Select the registered 'Company Name'.
- 3) In case of forgotten password, click on 'Forgot Password?'
  - Follow on-screen instructions.
  - Enter the registered 'Mobile Number' and 'Company Name'.
  - An OTP will be sent to the registered 'Mobile Number' to verify the account.
  - Enter OTP and click 'Next' to create a new password.



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# Payment Activation Guide

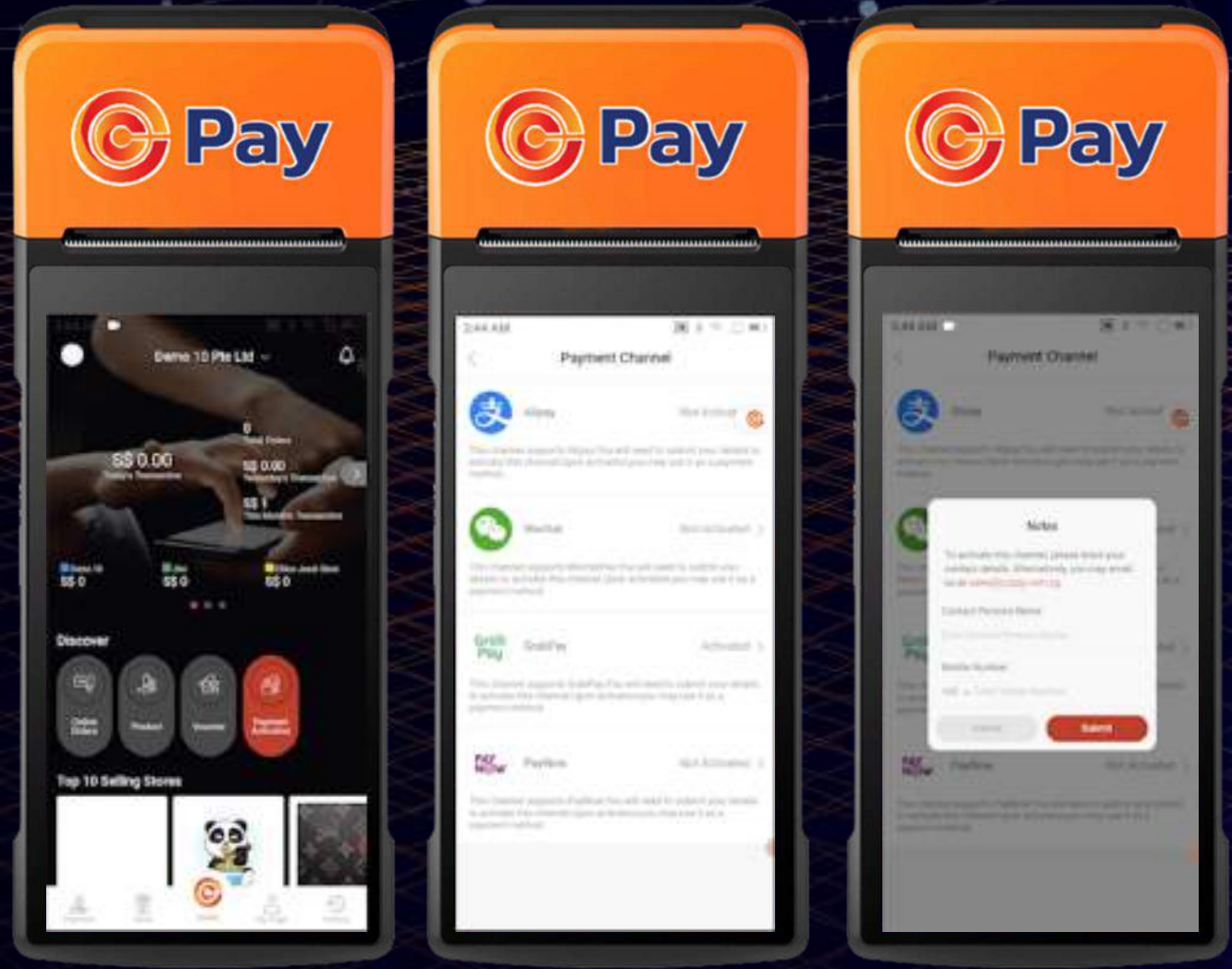


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# Payment Activation

- At the company view, click 'Payment Activation' under 'Discover'.
- The 'Payment Channel' page will display the available payment method and its status (activated/ not activated).
- Click on the relevant 'Not Activated' payment method to activate with the following steps:
  - Enter details 'Contact Person's Name' and 'Mobile Number'.
  - Or alternatively email details to [sales@ccpay.com.sg](mailto:sales@ccpay.com.sg).
  - Click 'Submit'
- This function allows merchants to submit relevant application details for payment channel activation.
- Representatives will contact the merchant to complete the sign up.



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# Payment Processing Guide

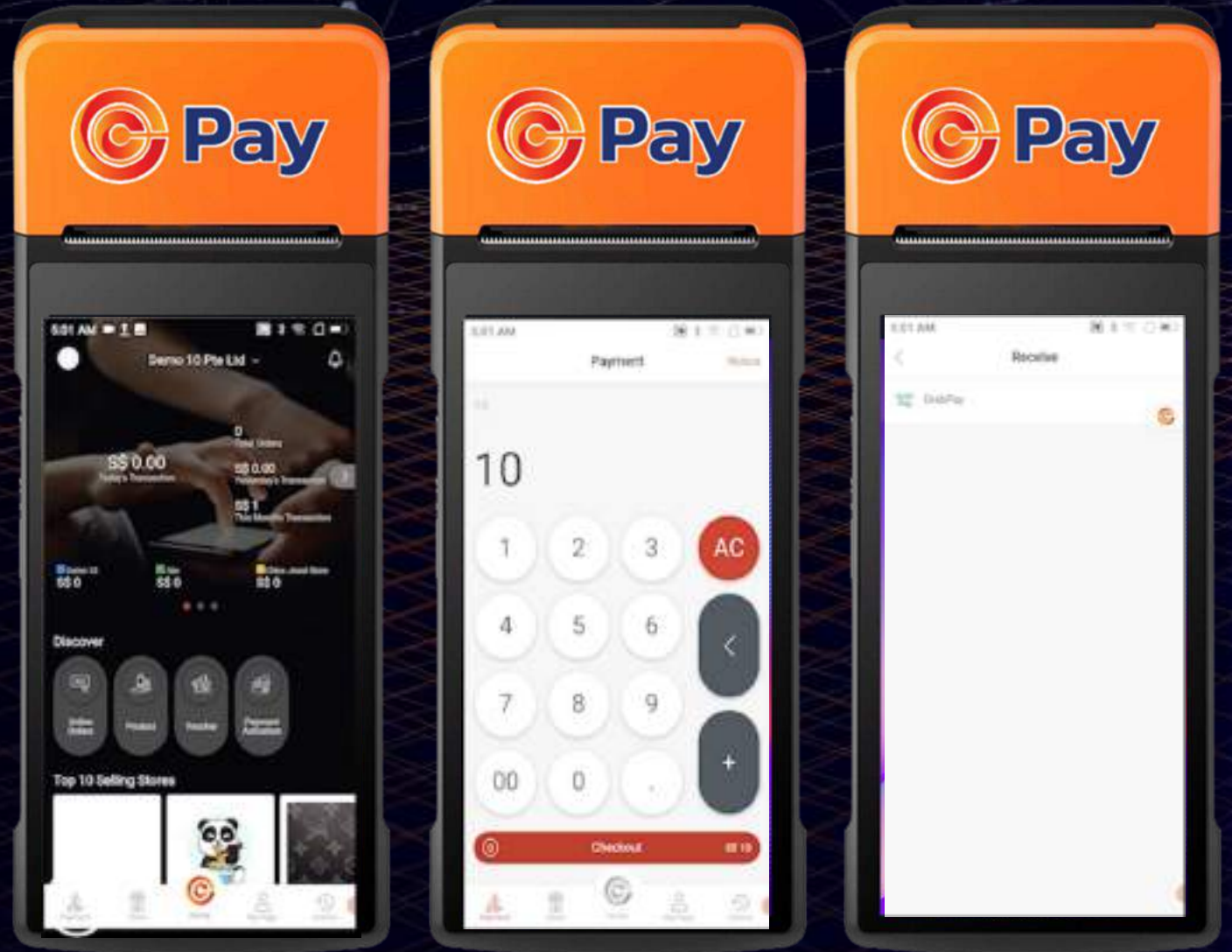


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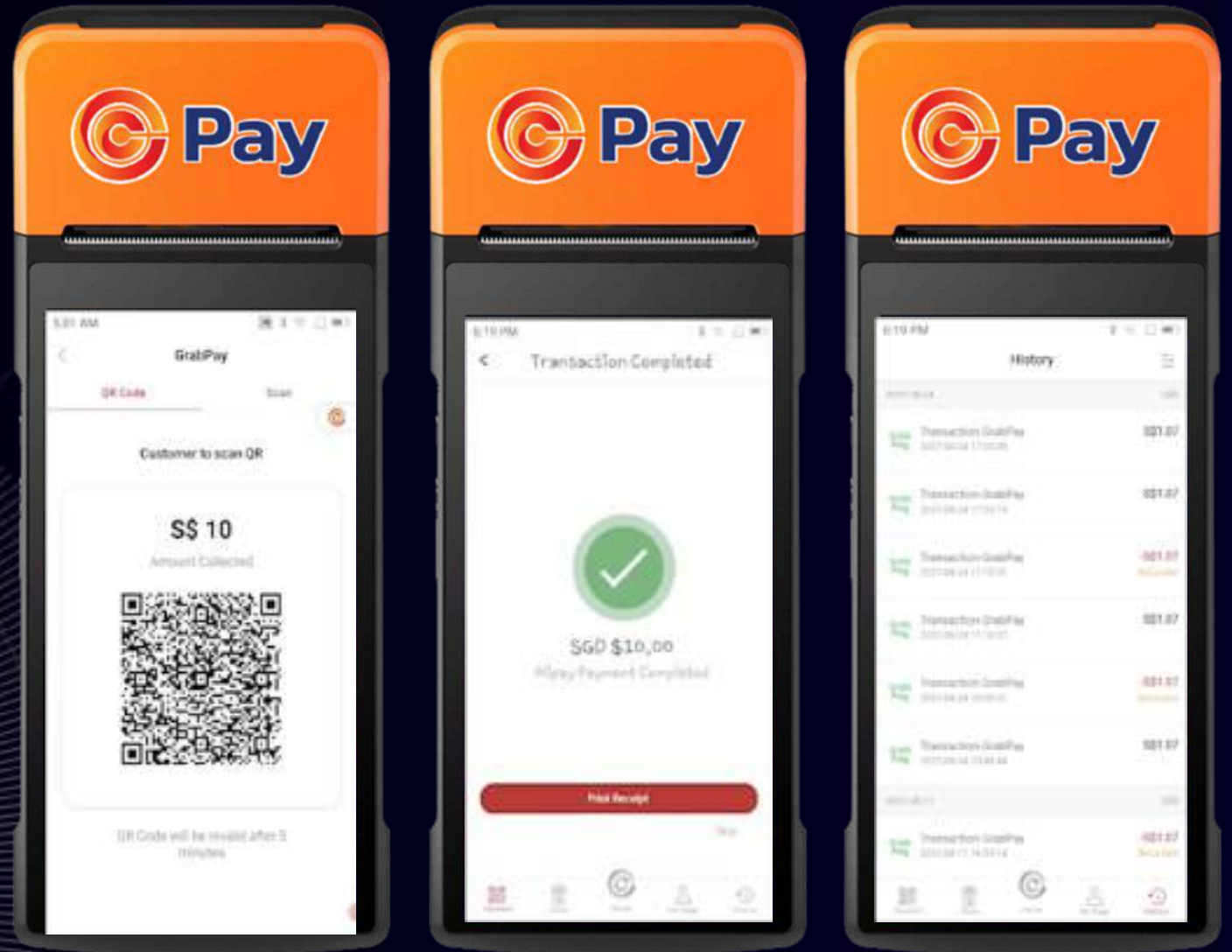
# Payment Processing (Customer to Merchant Guide)

- At Store home page, click 'Payment' tab at the bottom pane.
- On the 'Payment' page, enter amount payable and click 'Checkout'.
- On the next 'Receive' page, available payment channel will be displayed
- Click the relevant option to select payment method.



# Payment Processing (Customer to Merchant Guide)

- A QR code will be generated by default for customer to scan to receive payment.
- Alternatively, click on the 'Scan' tab next to the 'QR Code' tab to scan 'Consumer Payment QR Code'.
- A 'Transaction Completed' page will appear, once payment is successful.
- To retrieve all previous payment transactions, click on the 'History' tab at the bottom pane.



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# Offline Order Module Guide

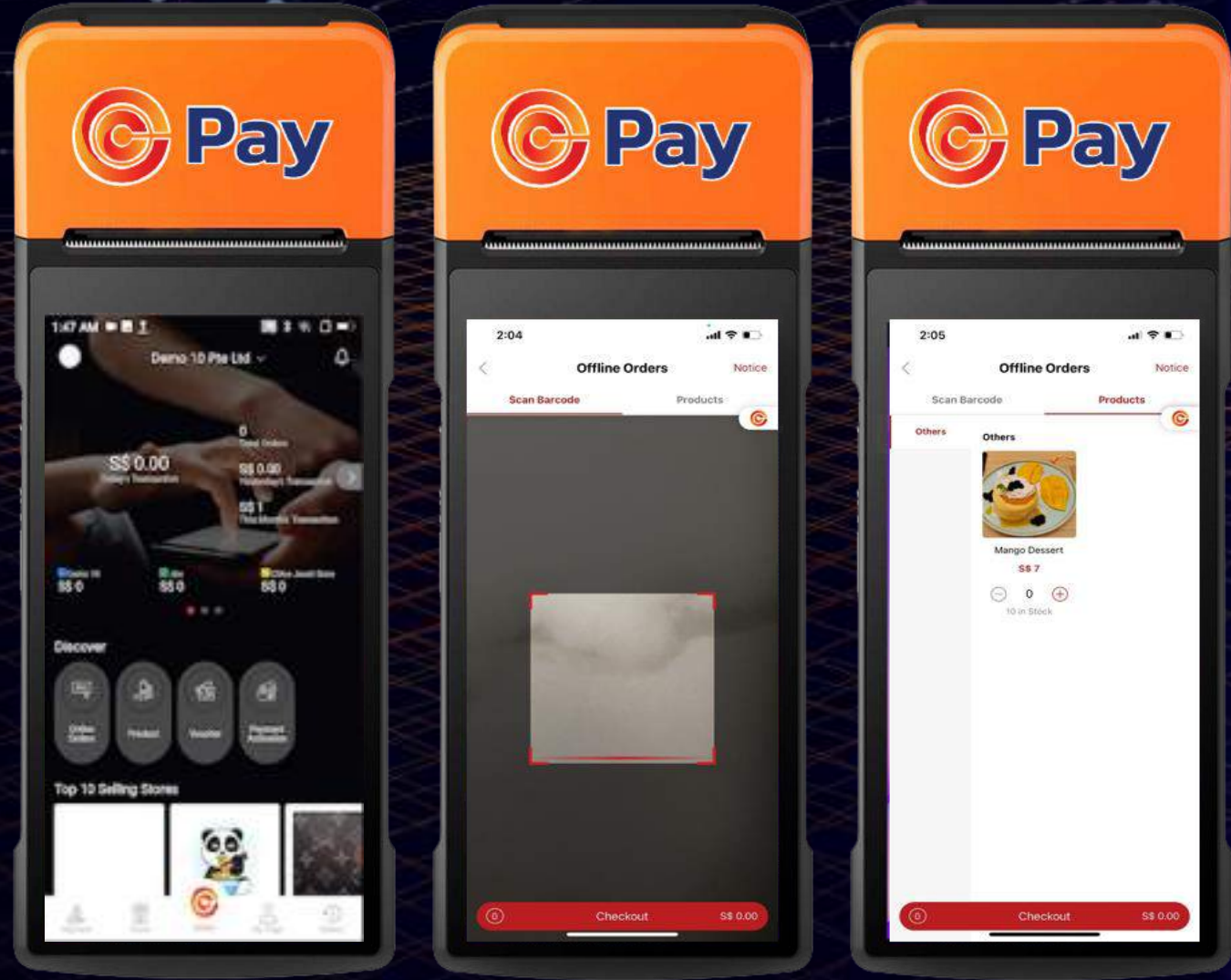


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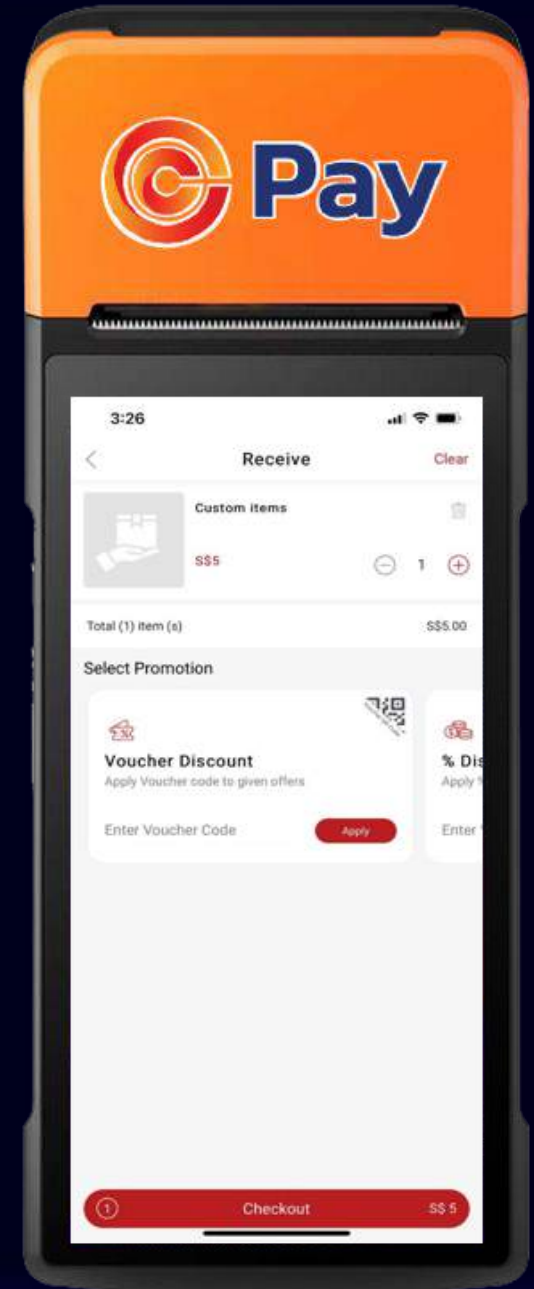
# Offline Order Module

- Select store view at the top of the home page.
- Under 'Discover', click 'Offline Orders' tab.
- At the 'Offline Orders' page, user can select the tab 'Scan Barcode' or 'Product' to process orders.
- With the order process selection, proceed and click 'Checkout' with the total amount indicated at the right and item quantity on the left side of the 'Checkout' bar.



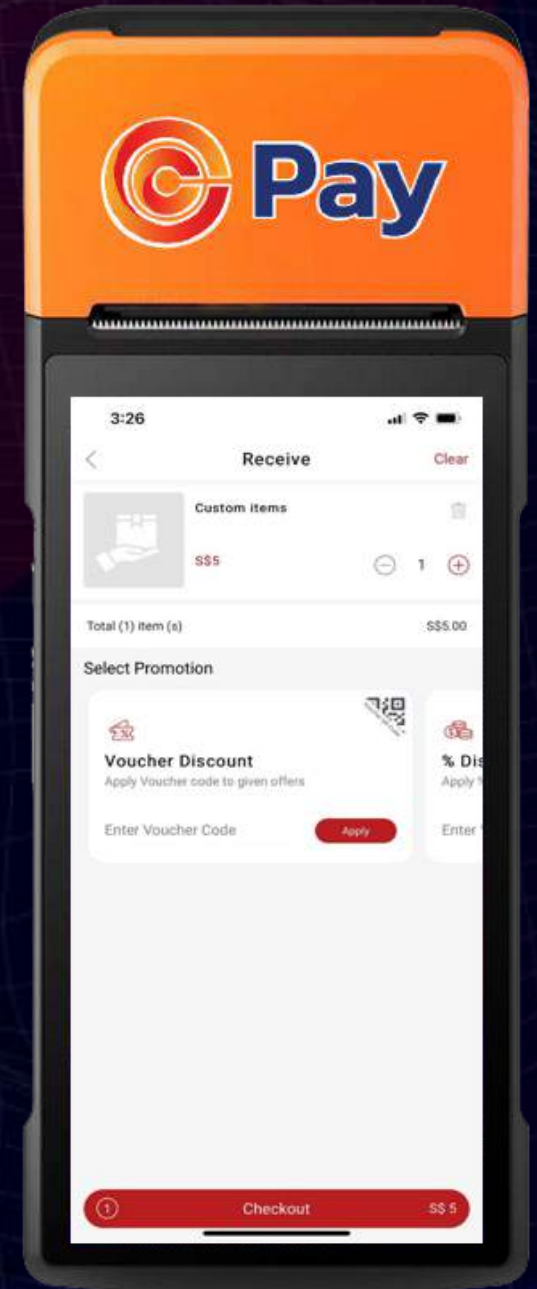
# Offline Order Module

- User will be navigated to the 'Receive' page displaying the following:
  - Product photo and name.
  - Amount and order quantity can be increased or decreased by clicking the '+' or '-' button.
- Items ordered can be removed by the 'Bin' icon located at the top right of the same pane.
- Grand total of items and amount is also displayed in a separate pane for easy reference.
- On the same page, under 'Select Promotion', user can select and click on the available promotions by scrolling side to side.
- Promotion can be selected and indicated in 'Voucher Discount' or '% Discount' or '\$ Discount'.
- Click 'Apply' to activate the selected promotion.



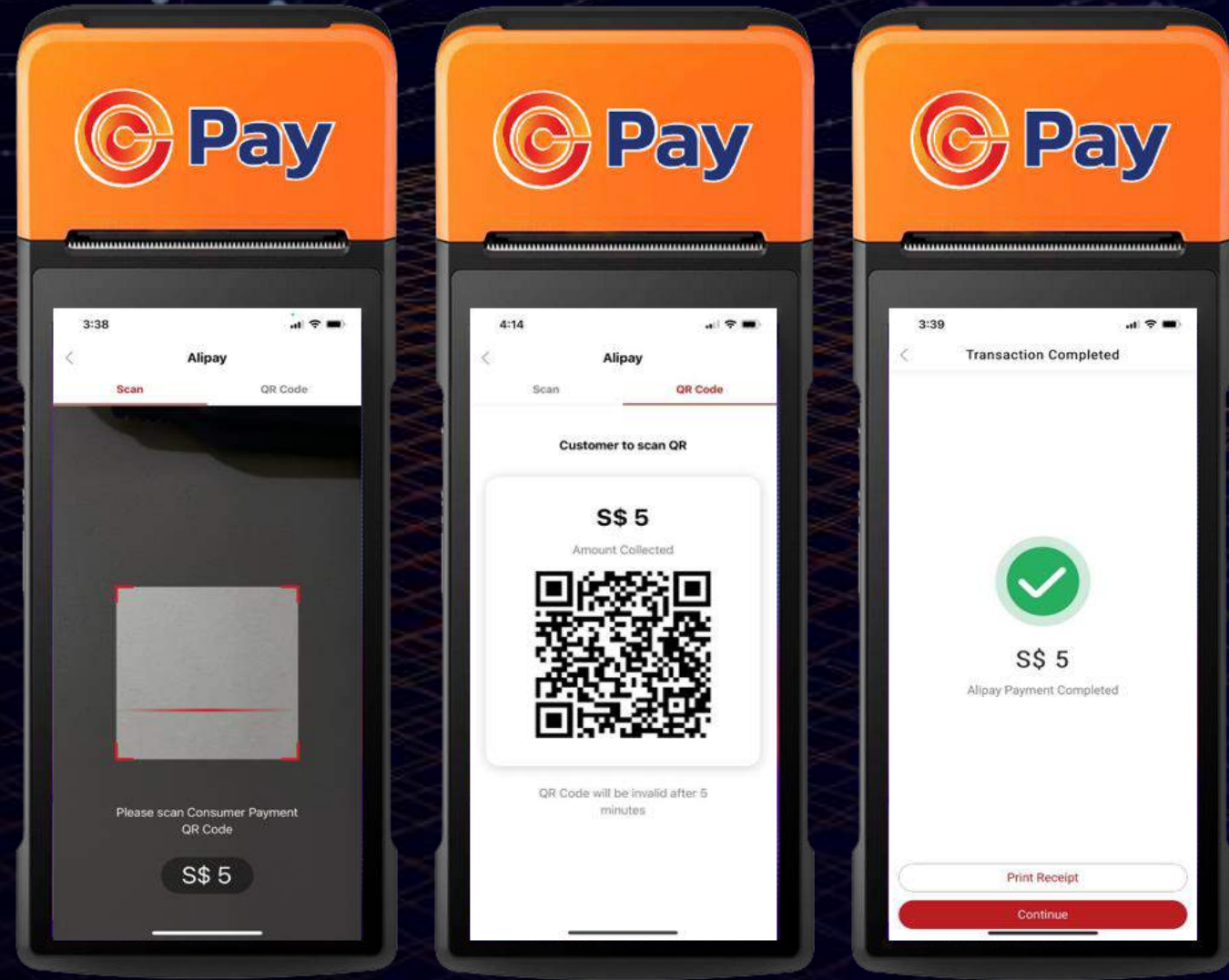
# Offline Order Module

- Once order and selection of promotion are set, click 'Checkout' at the bottom.
- Again, the total quantity and amount will be displayed on the left and right side of the 'Checkout' bar respectively.



# Offline Order Module

- After clicking the 'Checkout' bar, select and click 'Payment Method'.
- Once the 'Payment Method' is selected, customers have 2 payment processing method as displayed on the top tabs,
  - 'Scan' customer's QR Code or,
  - Customer to scan the generated 'QR Code' to proceed with payment.
- Again, the total amount will be indicated.
- Once an on-screen payment completed page is displayed, proceed to click 'Print Receipt'.



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# Online Order Module Guide

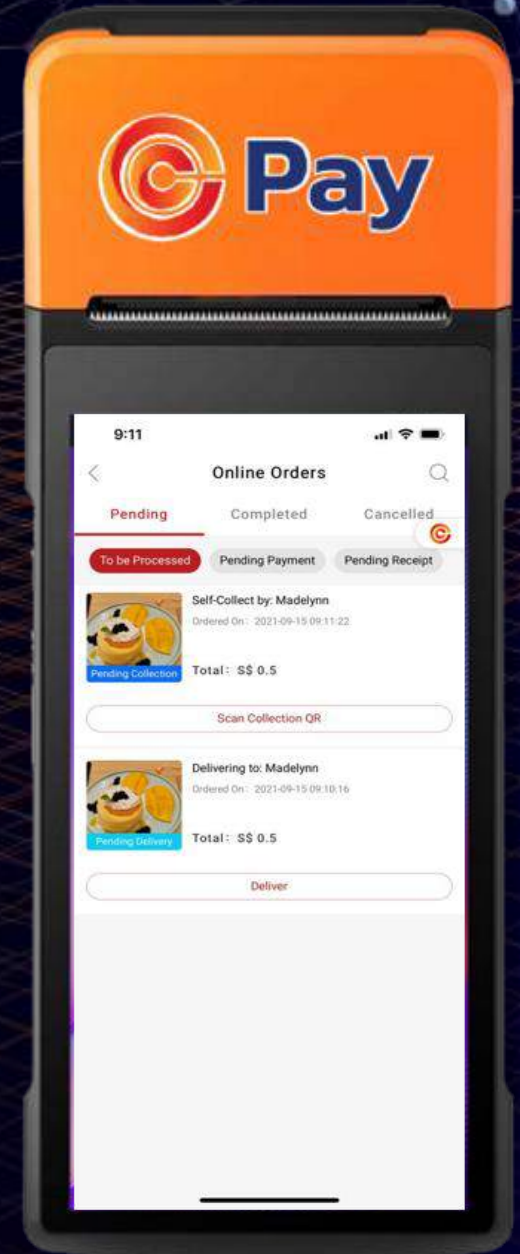
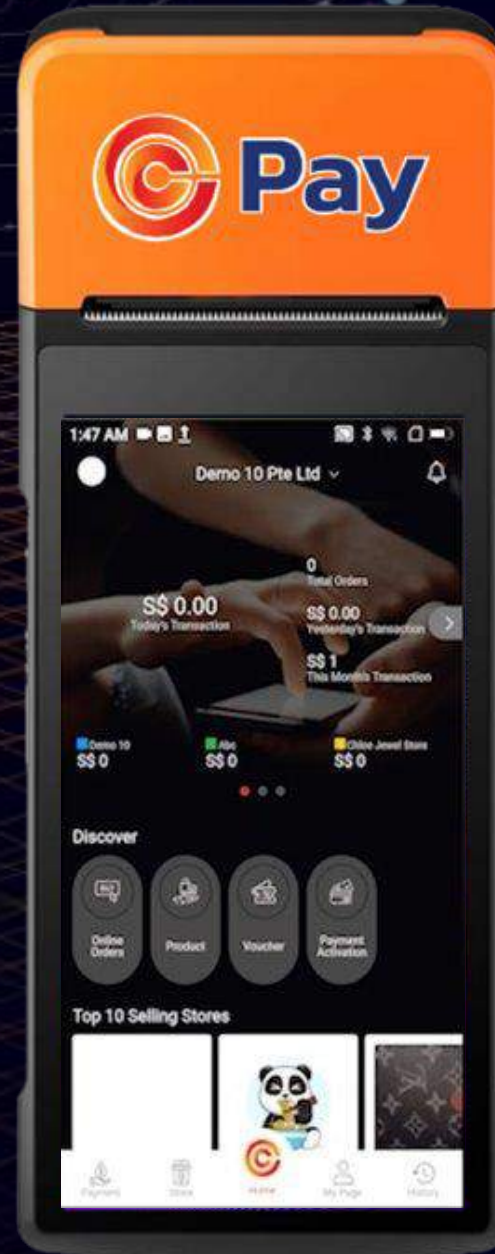


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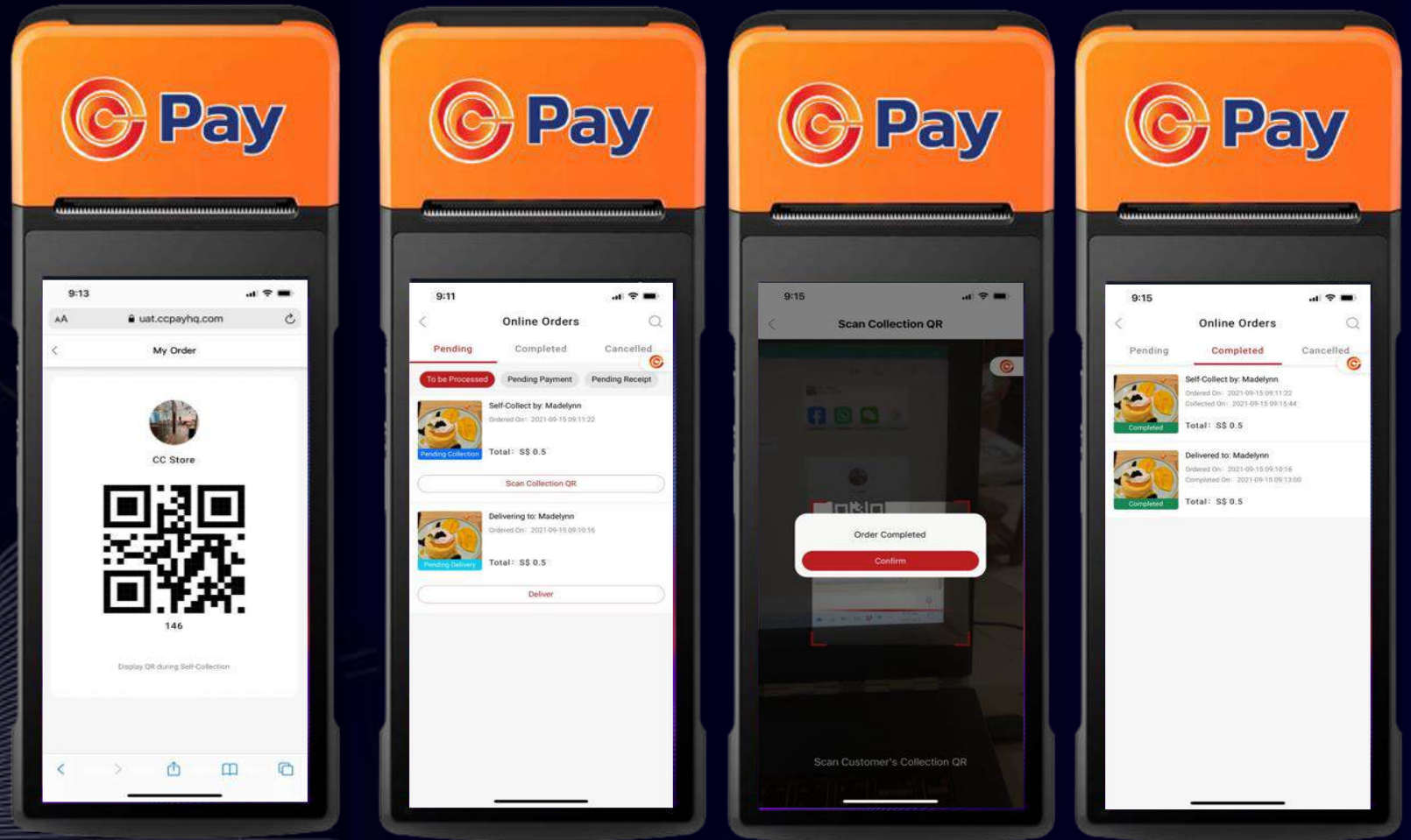
# Online Order Module

- The 'Online Order' can be selected in both company or store view.
- Under 'Discover', click 'Online Orders' tab.
- Once navigated to the 'Online Orders' page, user can refer to the 3 main tabs for order status:
  - 'Pending'
  - 'Completed'
  - 'Cancelled'
- Click on the 'Pending' and sub-tabs to check order status.
- Select 'To be Processed' sub-tab to display the following:
  - Product photo
  - Recipient name
  - Order date and time
  - Total order amount
  - Transaction status - 'Self Collection' or 'Delivery'



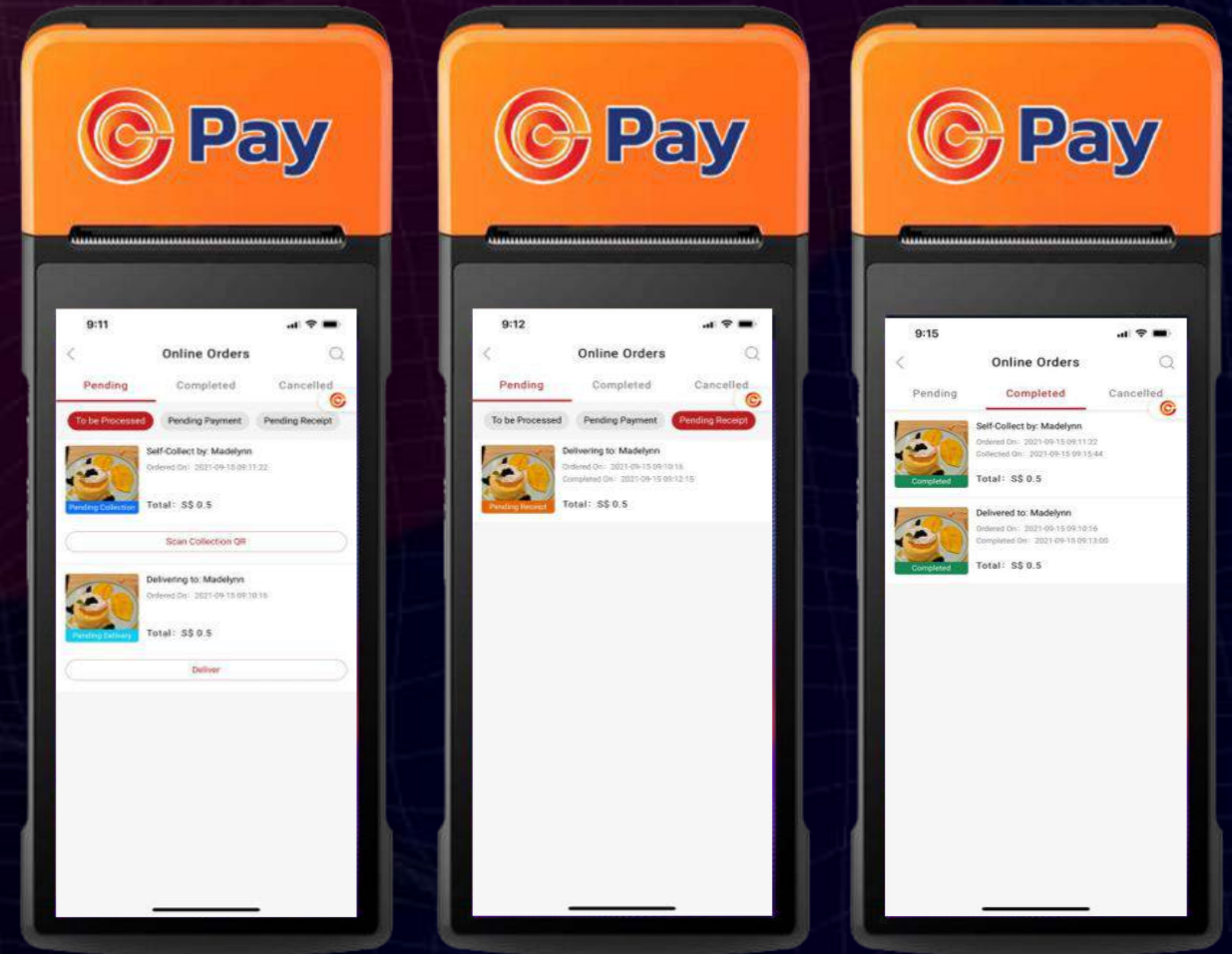
# Online Order Module

- For 'Self Collection', customer need to display the generated order QR code for scanning upon collection.
- To scan the order QR code, click 'Scan Collection QR code'.
- Once it is scanned by the user, an on-screen message will display 'Order completed', proceed to click 'Confirm'.



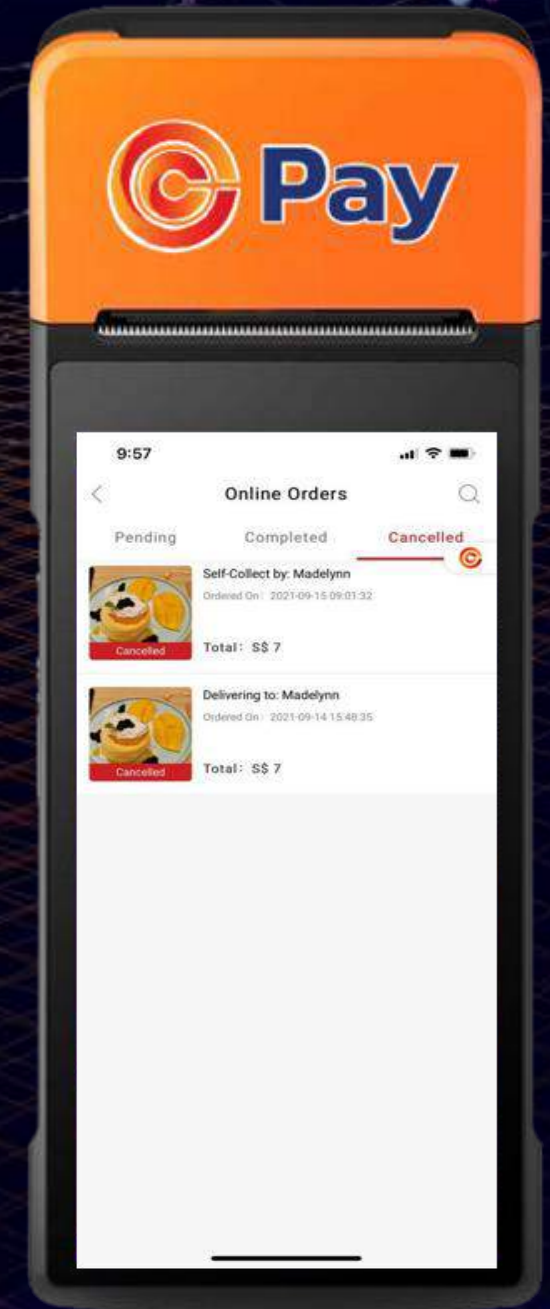
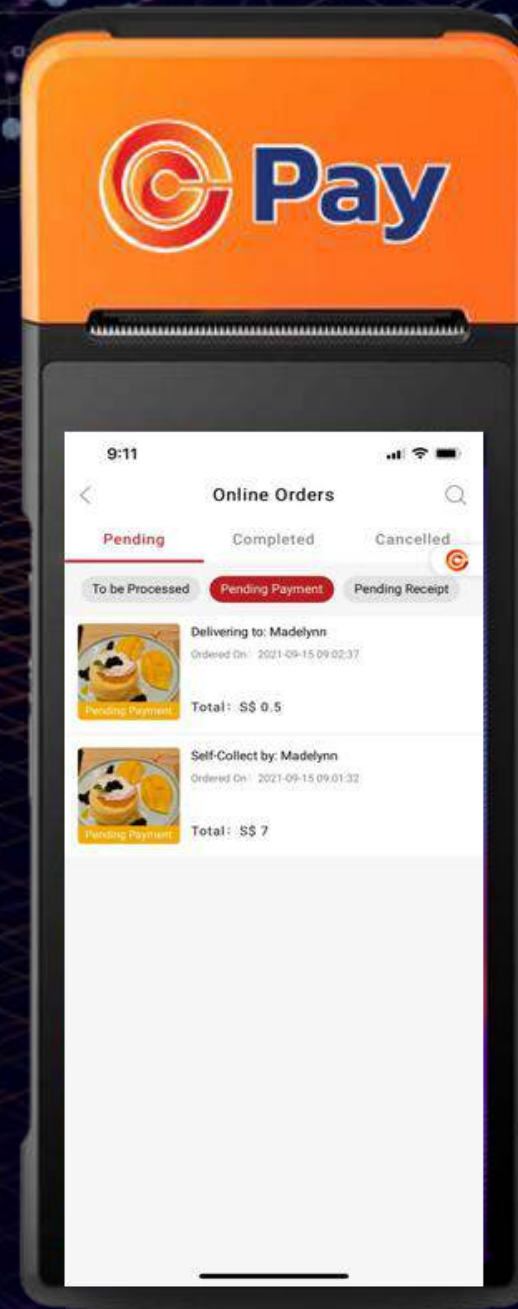
# Online Order Module

- All completed orders will be archived in the 'Completed' tab.
- For 'Delivery' transaction status, click the 'Deliver' bar to proceed with fulfilment.
- The order will be archived in 'Pending Receipt' tab.
- Once the customer has received the order and confirmed, the order will then be archived in the 'Completed' tab.



# Online Order Module

- Orders under the sub-tab 'Pending Payment' will be removed after 30 minutes of non-committal by customers and no action required from user.
- Likewise, click on the 'Cancelled' tab to display all cancelled orders by the customers and no action required by the user.



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# Refund Processing Guide



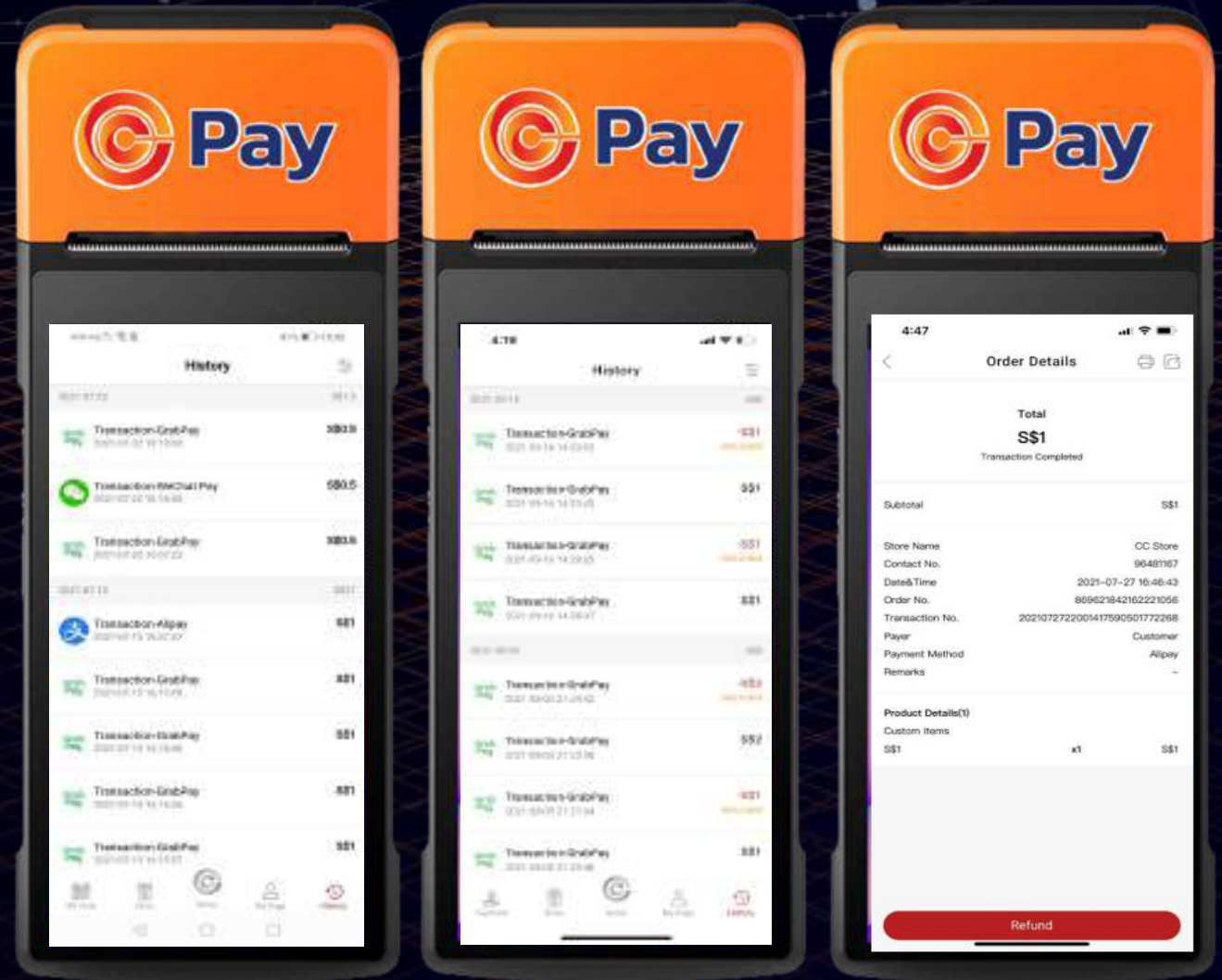
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# Refund

## Process 1

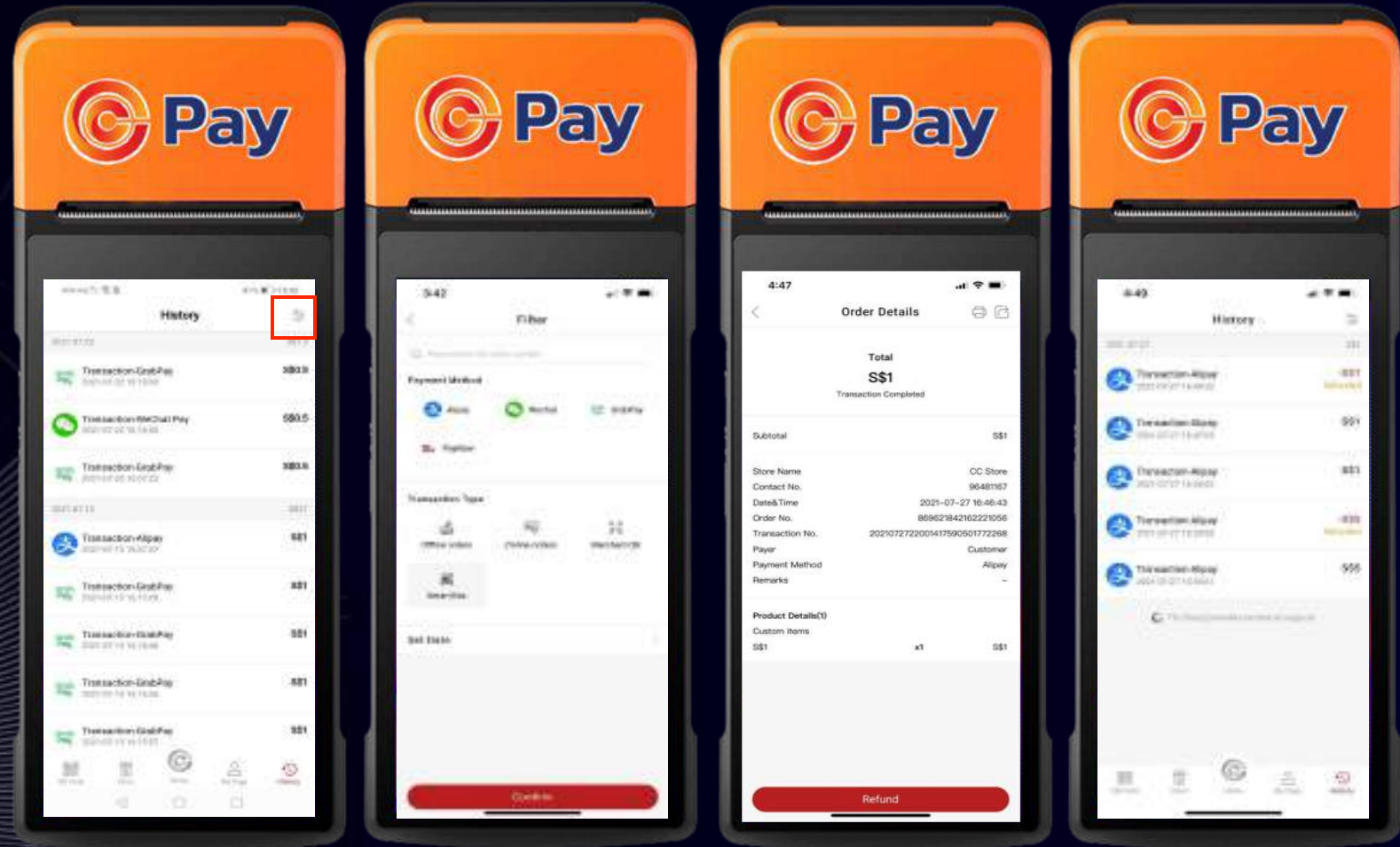
- To process a refund, click on the "History" tab.
- All previous payment transactions will be displayed.
- Scroll and select the transaction to process refund.
- Order Details page will be displayed with transaction and product details.
- Click 'Refund'.
- A pop-up message for confirmation would appear, click 'Confirm' to proceed with the refund amount
- Once refund is 'Successful', it would be notified on- screen



# Refund

## Process 2

- On the 'History' page, click on the 'filter' icon on the top right.
- At the filter page, users can select refund transactions by 'Payment Method', 'Transaction Type' or by 'Set Date'.
- Once the relevant transaction is selected, proceed to click 'Refund'.
- A pop-up message for confirmation would appear, click 'Confirm' to proceed with the refund amount.
- Once refund is 'Successful', it would be notified on- screen.



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# Earnings Module Guide

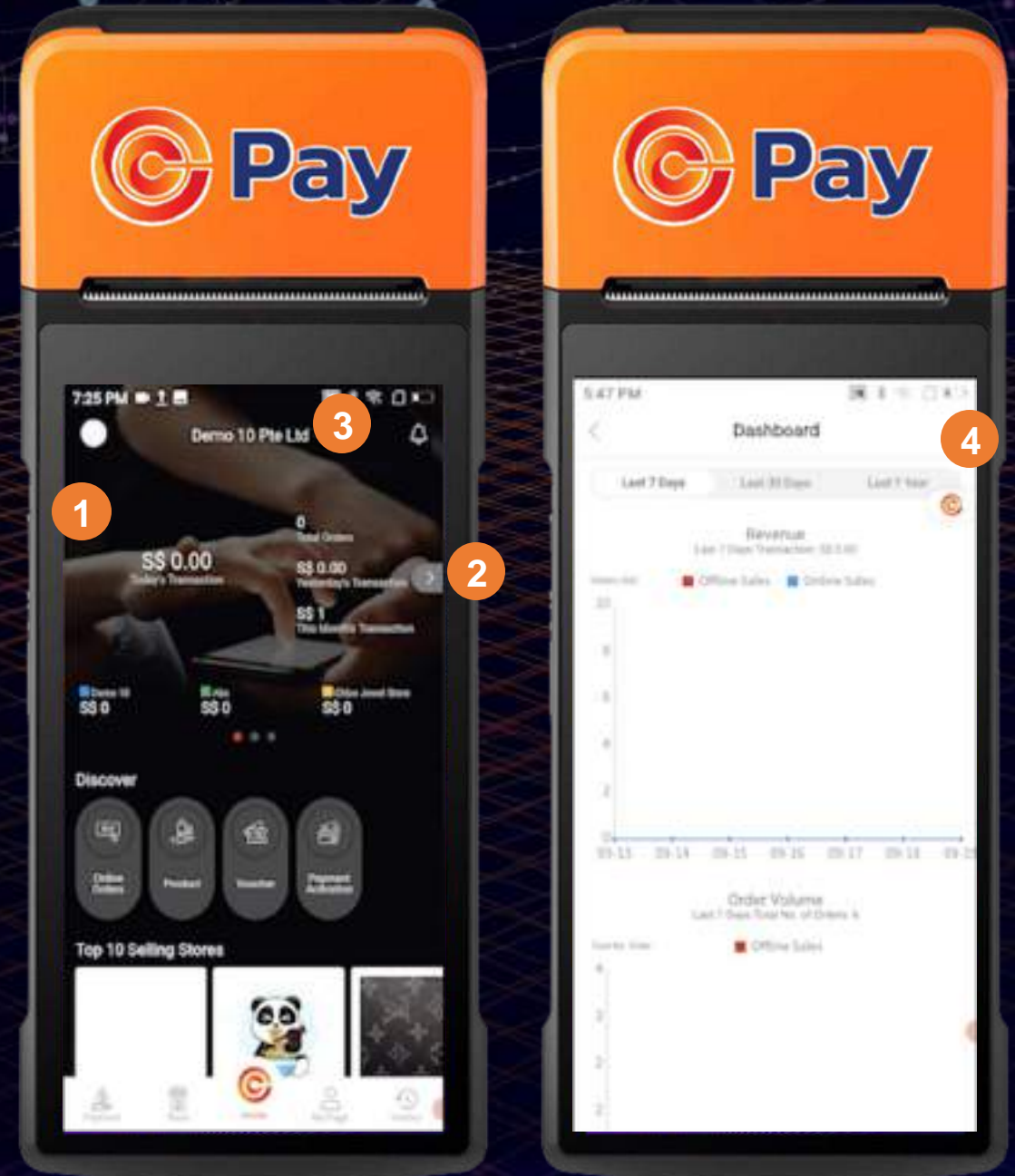


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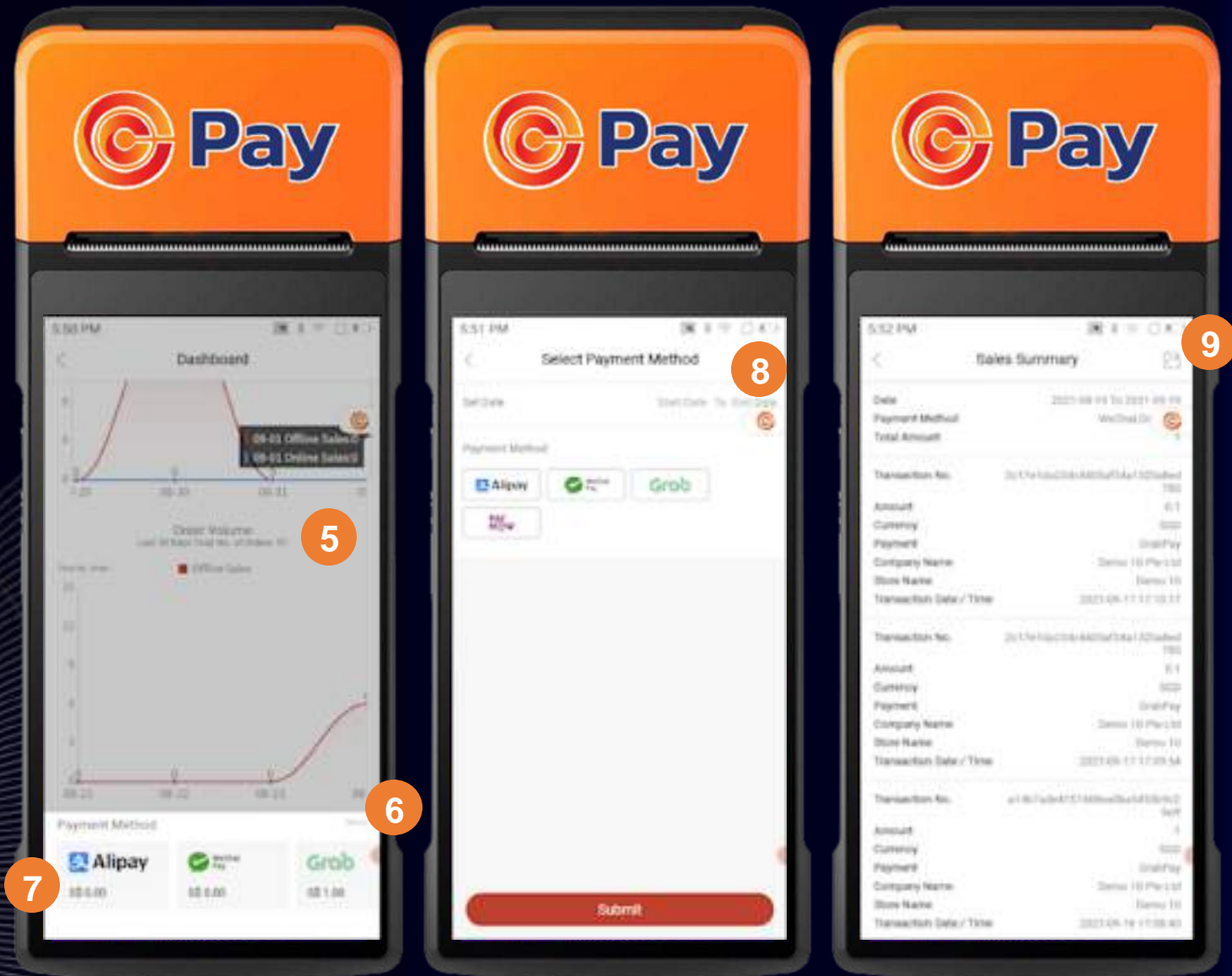
# Earnings Module

- 1) The Earnings Module helps users with sales insights and improve the following:
  - Predict purchase and consumption patterns.
  - Scale inventory levels to mitigate wastages.
  - Increase productivity while minimizing cost.
- 2) To launch, click the 'navigation arrow' on the right pane of the screen.
- 3) User may select to display company or individual store view.
- 4) On the 'Dashboard' page, click tabs to view 'Last 7 Days', 'Last 30 Days' and 'Last 1 Year' transactions.



# Earnings Module

- 5) Scroll down to view:
  - 'Revenue' for online and offline sales
  - 'Order Volume' for offline sales
- 6) Click 'More' to 'Set Date' (Start Date to End Date) for selected transaction period.
- 7) To view transaction volume by 'Payment Method', click on the available payment platforms.
- 8) Click 'Submit' to view sales summary for the selected period.
- 9) To share sales report, click on the share icon.



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# Product Listing and Management Guide



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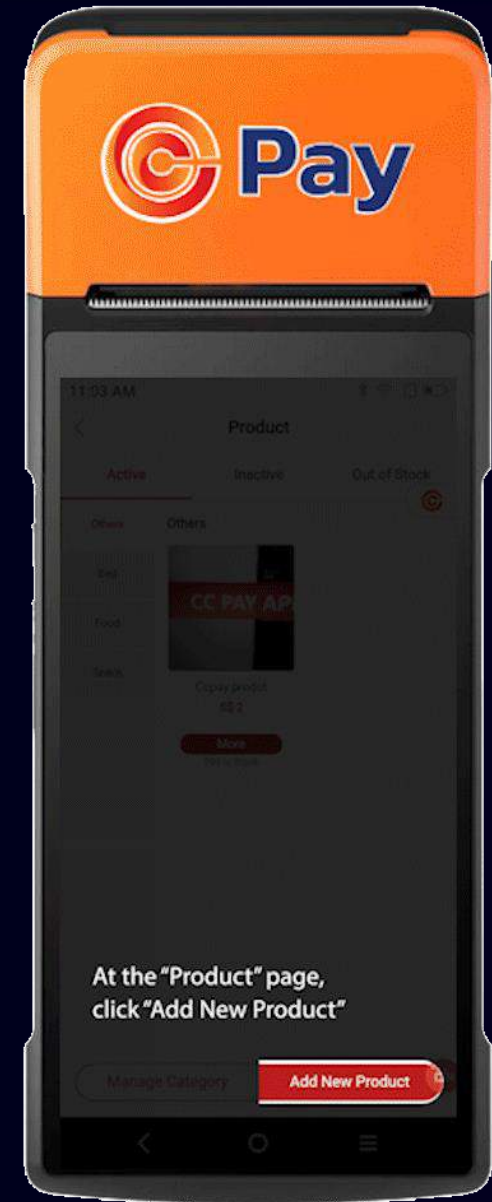
# Listing of New Product Category

- Launch Company View home page. Under Discover, click “Product” tab
- At the “Product” page, click “Manage Category”
- At the “Manage Category” page, click “Add New Category”
- Enter the category under “Product Category Name” and click “Confirm”
- User will be navigated back to the “Manage Category” with the new product category listed
- On the right side of the new listed product category, users also have the option to edit or delete the selected product category.
- Any other new product category listing, click “Add New Category”



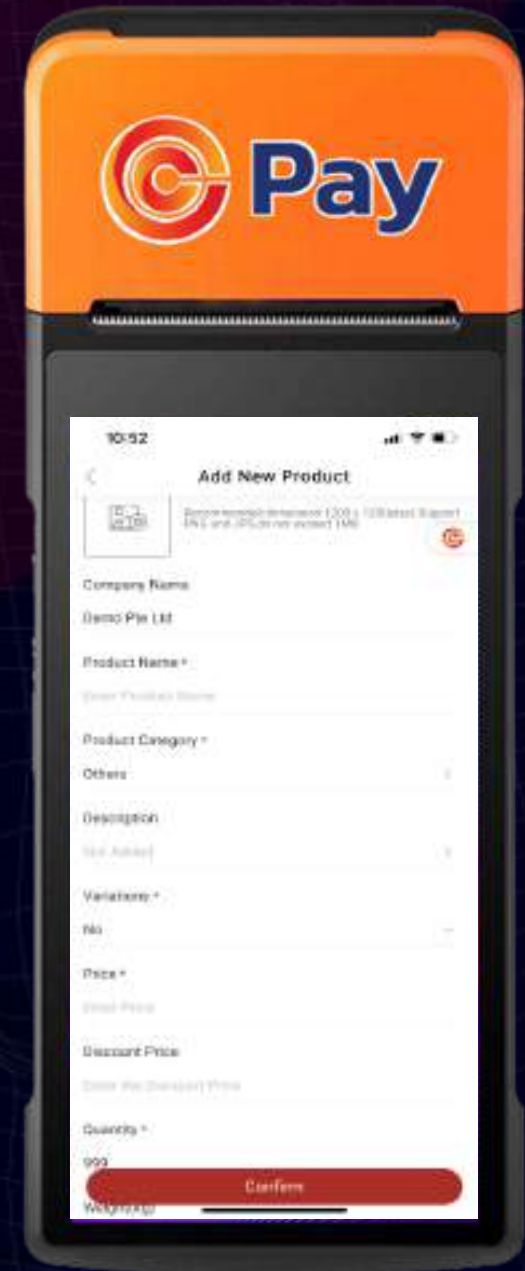
# Listing of New Product

- At the same “Product” page, click “Add New Product”
- At the “Add New Product”, enter the following for new listing:
  - Upload product shot photo (supports PNG and PNG - 1200 x 1200 pixel not exceeding 1MB)
  - Company Name
  - Product Name
  - Product Category (select from the drop down menu bar)
  - Product Description



# Listing of New Product

- Variations
    - Select 'No' for no product variations
    - Select 'Yes' with variations
      - ❖ Enter "Variation Type"
      - ❖ Select "+" to add "Variation Type"
      - ❖ Edit or delete previous variations
  - Price
  - Discounted Price (if necessary)
  - Quantity
  - Weight (kg)
  - Barcode or scan product bar code for listing via the bar scanning icon on the right
  - Status
- Once completed, click "Confirm"

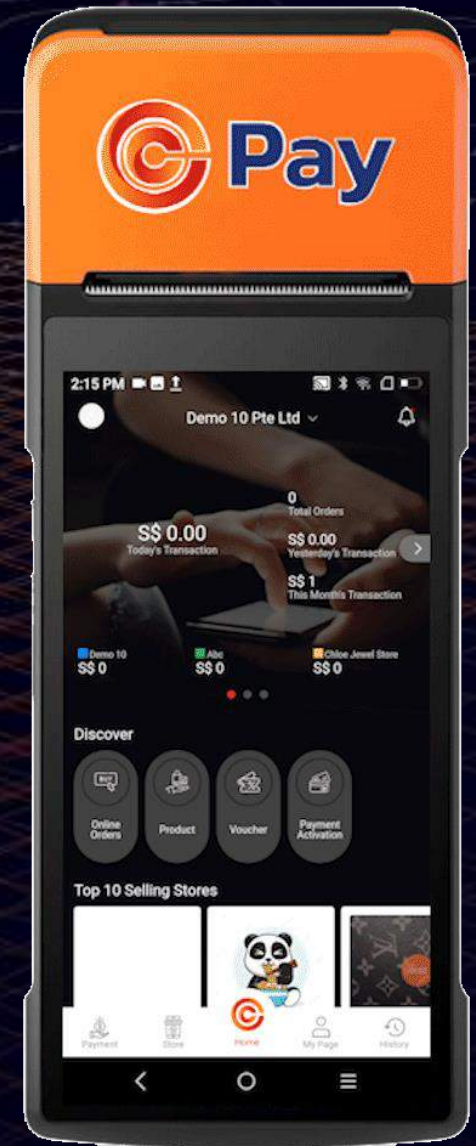


## ***Edit Product Function***

- Navigate back to “Product” page, select the listed product to be edited and click “More”
- In the pop up option, select “Edit”
- Edit details and click “Save”

## ***Listing Preview Function***

- Navigate back to “Product” page, select the listed product to be edited and click “More”
- In the pop up option, select “Edit”
- The “Preview” function will display the view that is visible for online customers

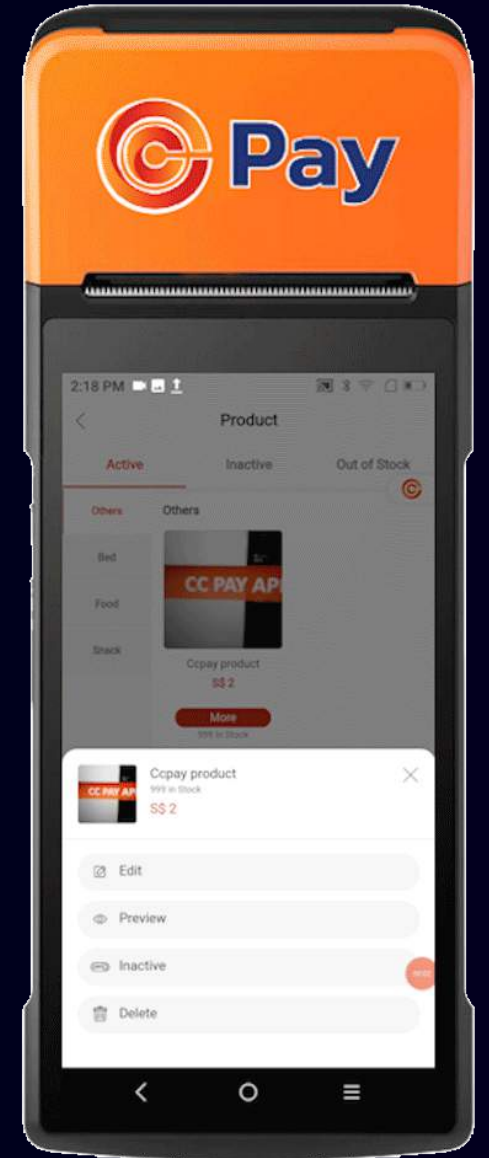


## Change Product Status

- Navigate back to “Product” page, select the listed product to be edited and click “More”
- In the pop up option, click “Active” or “Inactive” to change status
- Once completed, on-screen message will display “Successful”

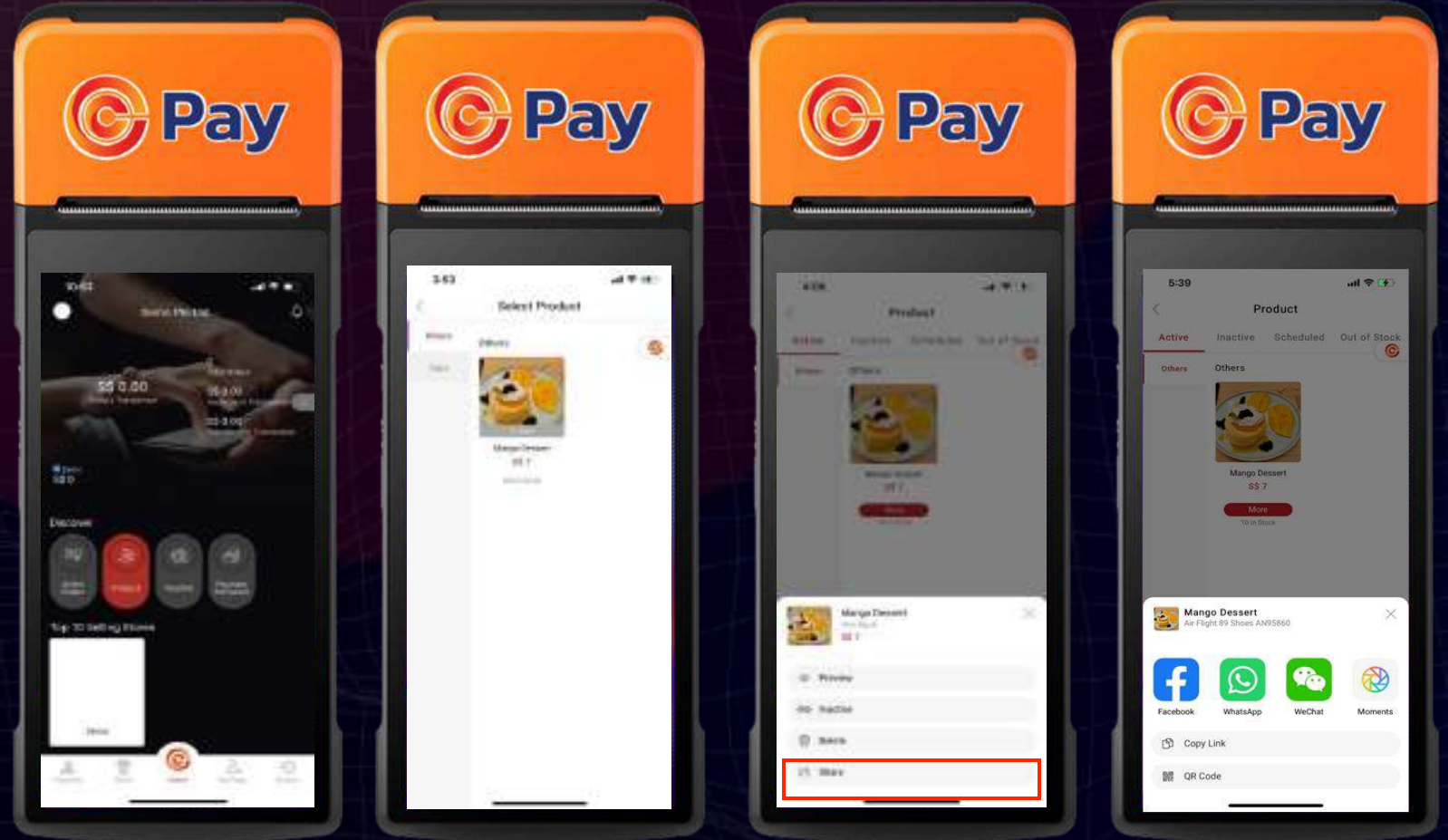
## Delete Product

- Navigate back to “Product” page, select the listed product to be edited and click “More”
- In the pop up option, click “Delete”
- On the on-screen message,
- click “Confirm” to delete product
- Once completed, on-screen message will display “Successful”



# Share Product

- Navigate back to “Product” page, select the listed product to be edited and click “More”
- In the pop up option, click “Share”
- Select from the on screen message the options either via link or QR on various social media and messaging apps.



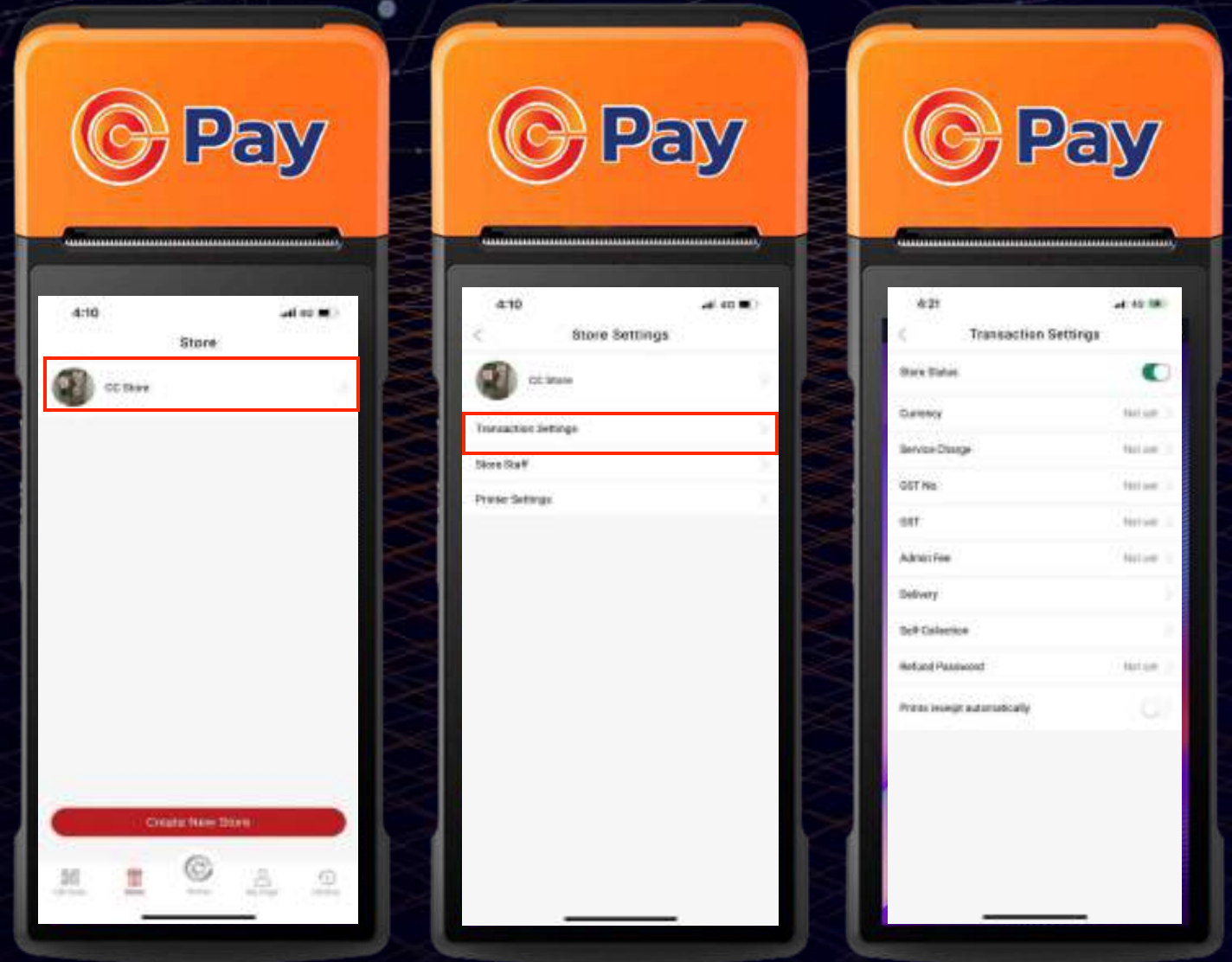
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**Store Settings**



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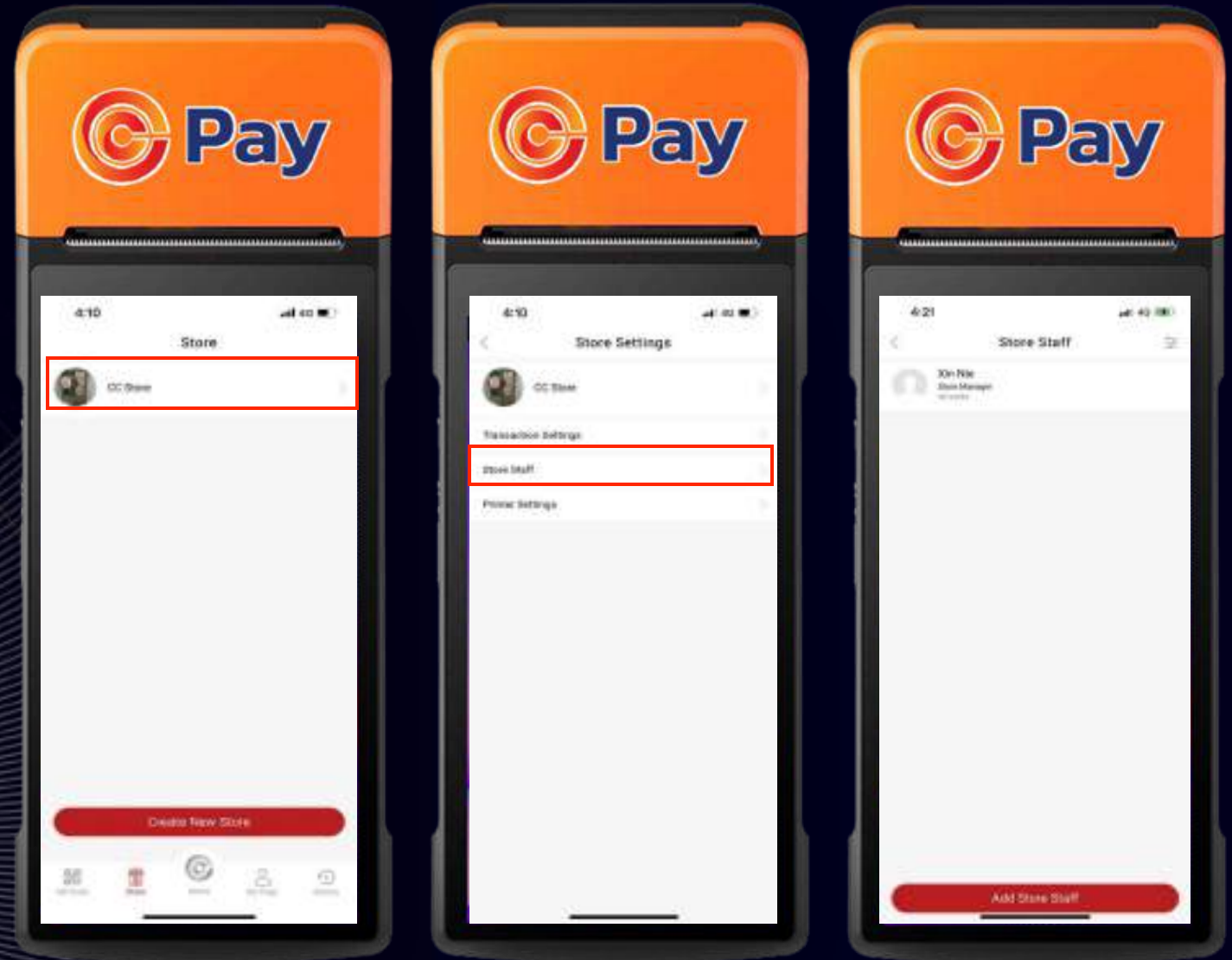
# Changing Transaction Settings

- Click on 'Store'.
- Select 'Transaction Settings' to change store transaction settings.
- E.g. Click on 'Admin Fee' to add an admin fee to all transactions.



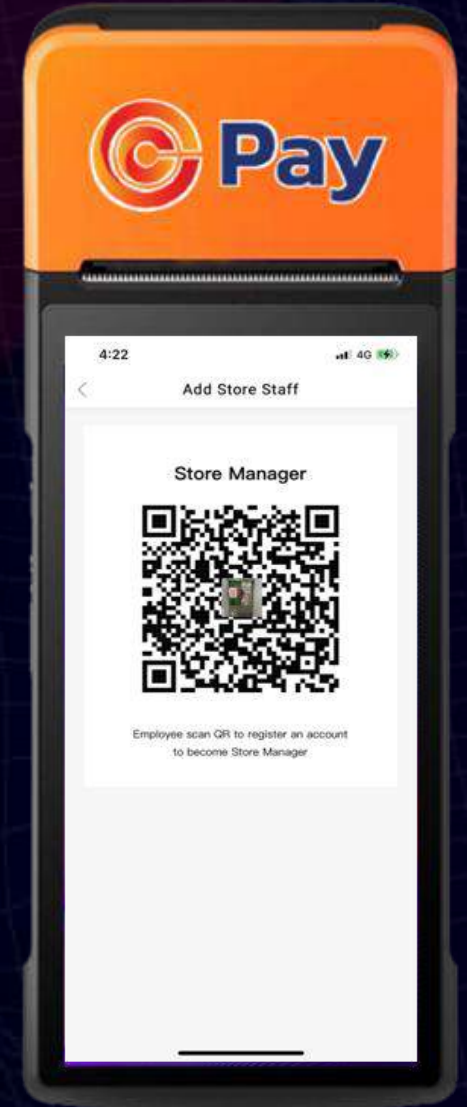
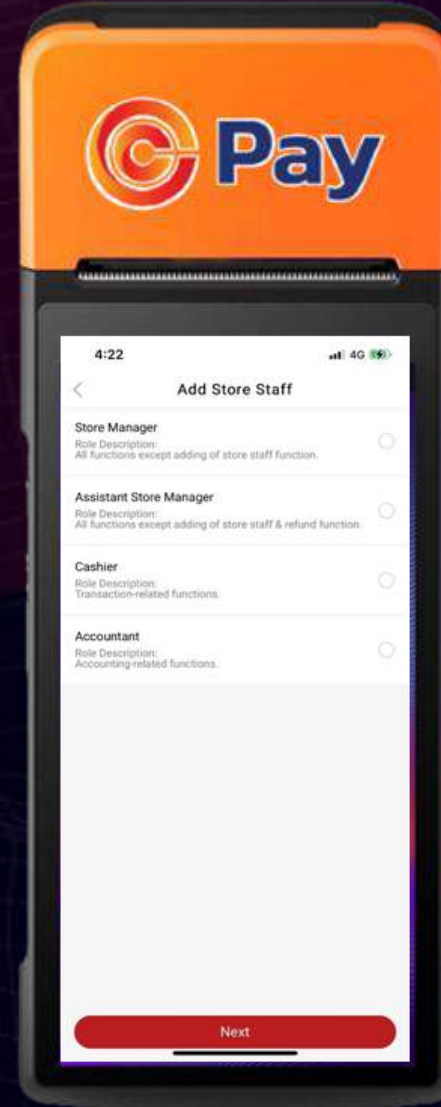
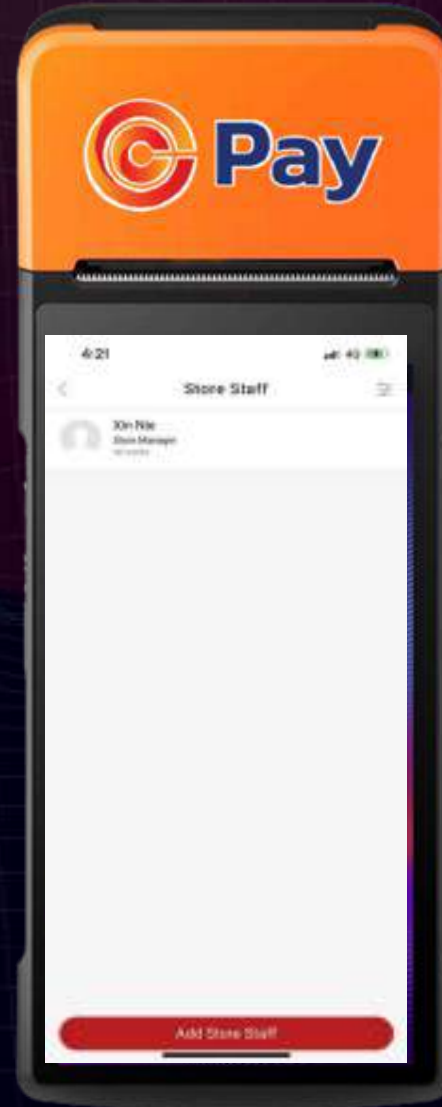
# Displaying Store Staff

- Click on 'Store'.
- Selecting 'Store Staff' will display a list of staff currently working in the store.



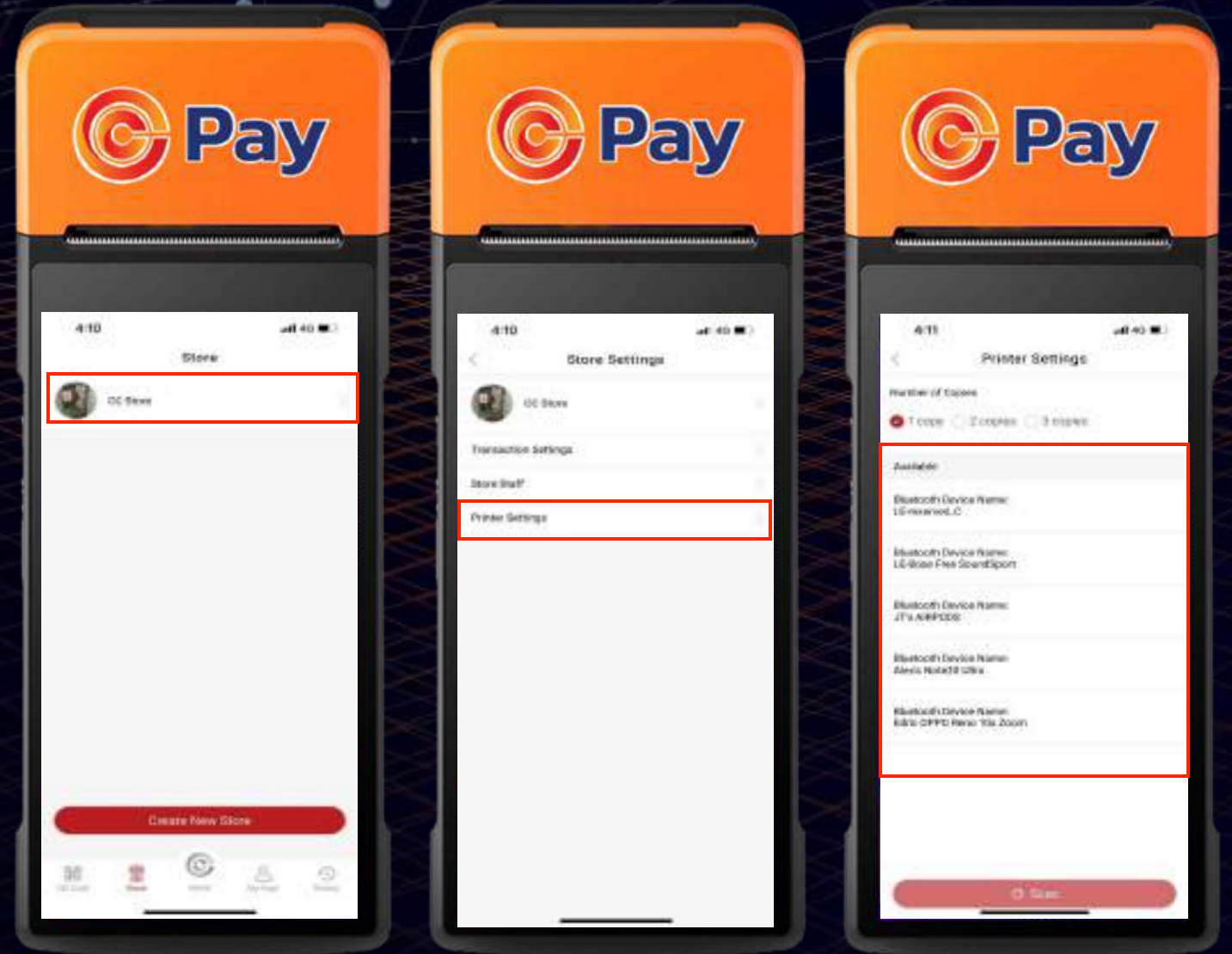
# Adding Store Staff

- Click on 'Store'.
- To add a store staff to the list, tap on 'Add New Staff', select Staff Role.
- Staff scans QR to confirm his/her role.



# Setting the printer for Store

- Tap on 'Store'.
- Select 'Printer Settings'.
- Choose Number of Copies and select 'Scan'.
- A list of detected printers will appear and select one of them.



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# My Page

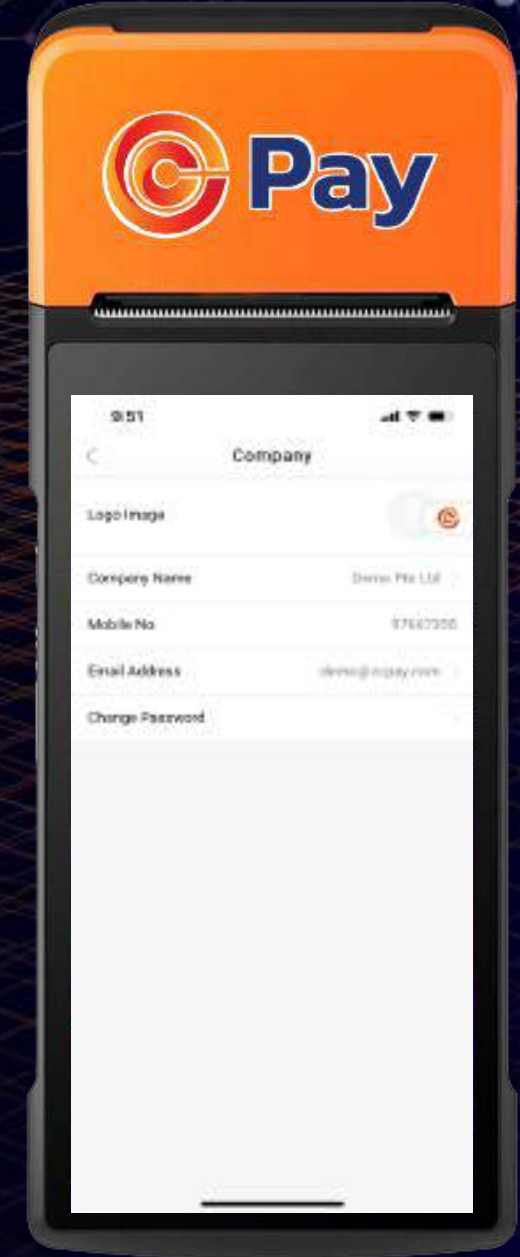
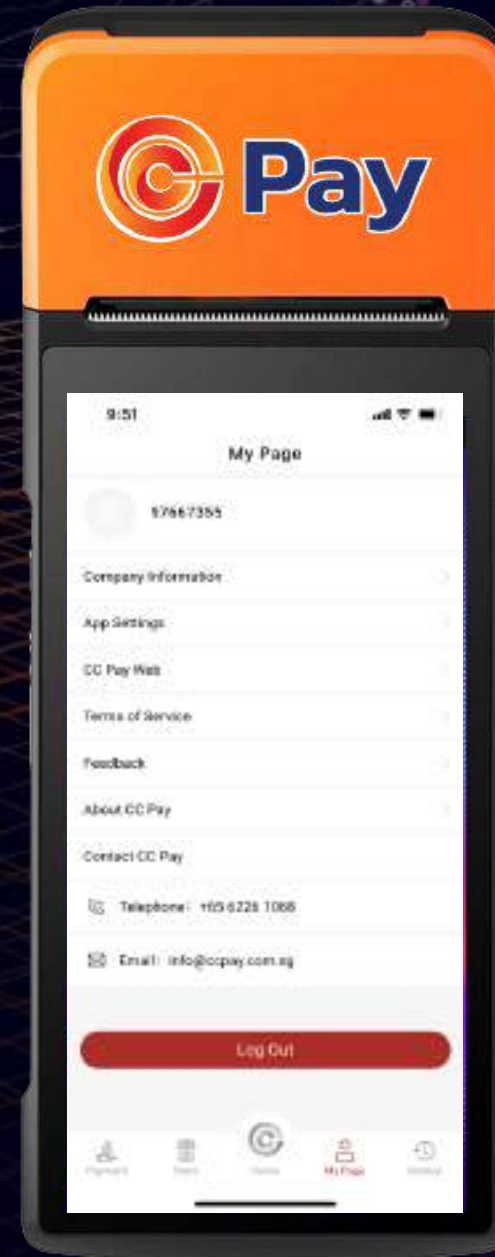


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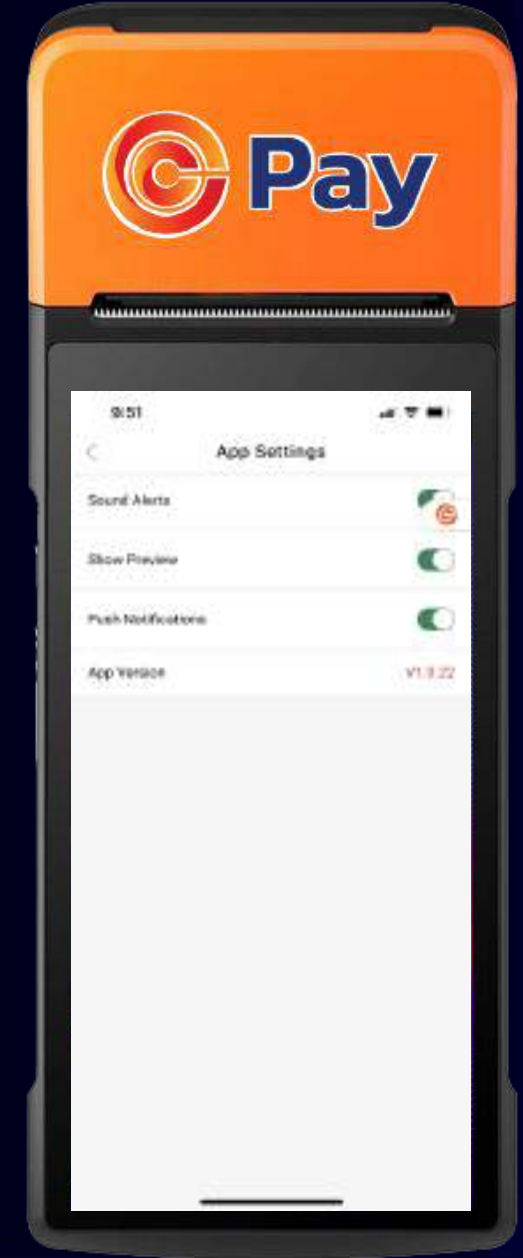
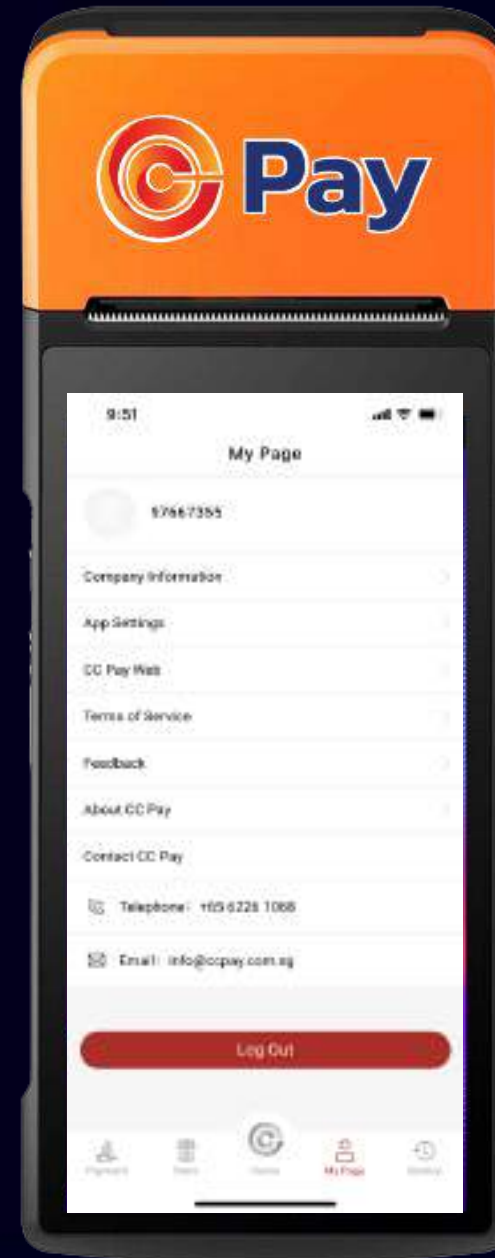
## Company Information

- 1) Click on 'My Page'
- 2) Select 'Company Information' to display company information
- 3) E.g. Click on 'Change Password' to change the password



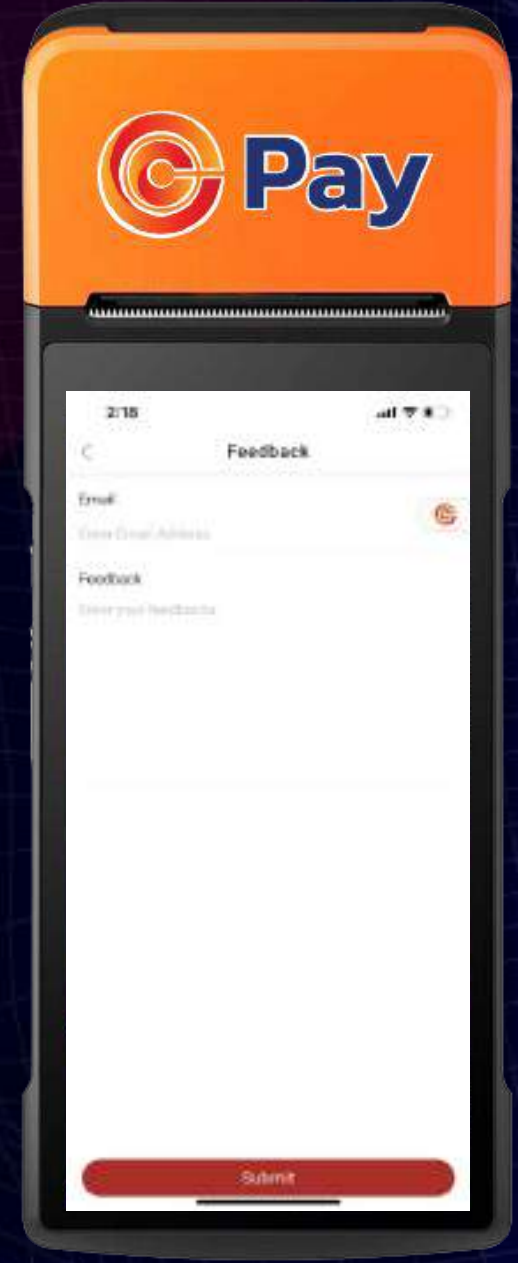
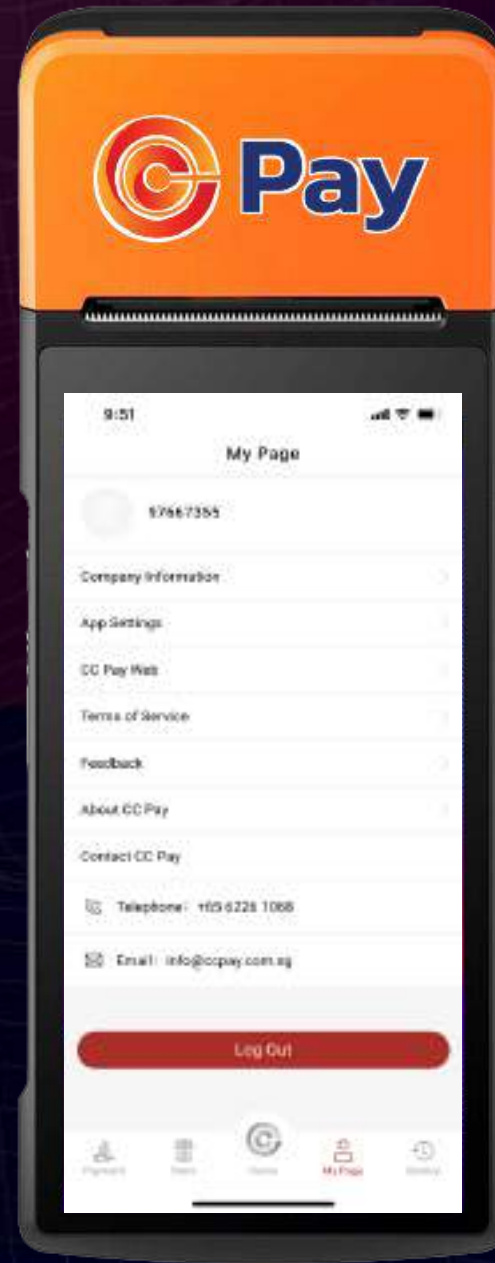
## App Settings

- 1) Click on 'My Page'
- 2) Selecting 'App Settings' will display a list of settings a user can change
- 3) E.g. Click to turn on or off sound alerts
- 4) Click on the 'App Version' to update the app to the latest version



## Feedback

- 1) Click on 'My Page'
- 2) Select 'Feedback' and leave your email details with suggestion on how CCPay can serve you better.



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# Voucher



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## *Adding A Voucher*

- Click on the 'Add New Voucher', fill in the details of the voucher e.g. discount type, amount of discount, minimum spending, available qty, collection limit per user, start date and end date and click 'Confirm'.
- The created voucher will be shown after clicking on 'Confirm'

## *Voucher Details and Sharing*

- The created voucher details such as Total recipients, No. of voucher redeemed can be viewed.
- Details can also be edited, shared or duplicated.



# Thank You

**Contact Us:**

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