



PayMe for Business

Starter Guide

商戶入門指南

2022

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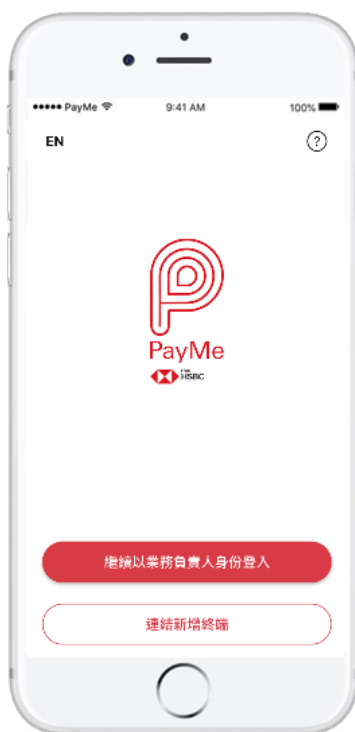
I. 簡介

PayMe for Business 已隆重登場！我們知道您熱切期待連繫超過 280 萬位 PayMe 用戶，所以我們為您準備了這份商戶入門指南，讓您於使用 PayMe for Business 時更得心應手。

有關 PayMe for Business 的條款及細則，請參閱

<https://payme.hsbc.com.hk/zh-hk/business-terms-and-conditions>

或聯絡我們了解詳情。



PayMe for Business 只適用於滙豐商務「網上理財」客戶使用。另外，現階段每間公司只能開設一個 PayMe for Business 賬戶，而該賬戶會於註冊時連結一個銀行戶口。如您的業務設有多間分店，我們建議您使用終端管理功能。

登記滙豐商務「網上理財」

如果您是滙豐工商金融服務的客戶而仍未登記使用網上理財，請前往 <http://www.business.hsbc.com.hk/bib> 了解更多以確保您可以使用 PayMe for Business。

登記滙豐工商金融服務

如您想開設戶口，或與我們洽談，了解滙豐如何助您業務大展拳腳，請前往 <http://www.business.hsbc.com.hk/biz-accounts> 了解更多，我們稍後會與您聯絡。

II. 下載及註冊的事前準備



- **商務流動裝置**，作為您商店的銷售終端機 (POS)。此外，您還需要：
 - Wifi 或數據網絡
 - iOS 12.0 / Android 7.0 或以上版本
 - 建議使用手機以享最佳效果，但我們亦支援平板電腦
- **香港業務手機號碼**，以用作賬戶登入及接收供登入用的驗證碼
- **業務電郵地址**，以接收驗證電郵及交易提示；您將來亦需要此電郵以重設您的賬戶密碼
- **滙豐商務「網上理財」賬戶資料**
- 該戶口的**保安編碼器** 或 **Business Express** 應用程式

重要事項

賬戶註冊手機號碼將會接收驗證碼，以授權作一些賬戶資料更改或登入賬戶。
在註冊過程中，您需要設定一個賬戶密碼，以授權進行以下的重要交易，包括：

- 退款
- 將資金轉賬至您的商務銀行戶口
- 更改賬戶資料，例如賬戶密碼、電郵地址或電話號碼

立即下載

簡單掃描 QR code，即可下載 PayMe for Business 流動應用程式：

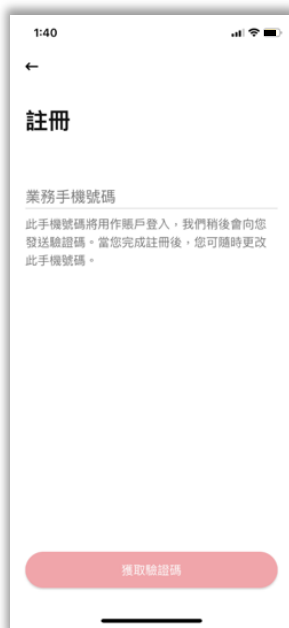


您亦可於 App Store 或 Google Play™ 搜尋「PayMe for Business」下載。

III. 註冊賬戶



1
註冊前
請先準備好以上各項



2
輸入香港業務手機號碼
並完成驗證



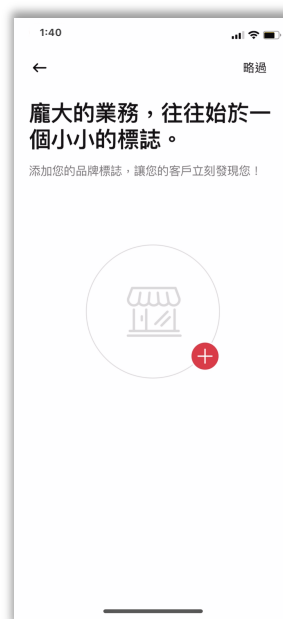
3
輸入業務名稱



4
輸入業務電郵地址



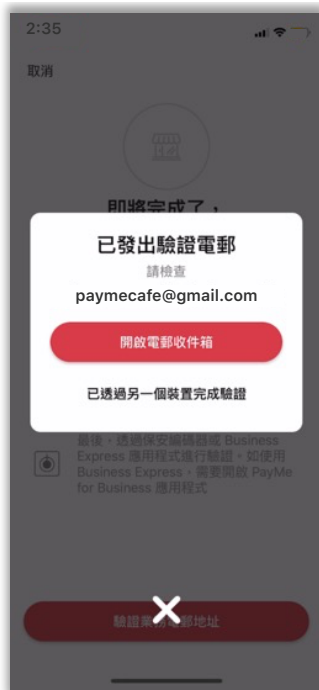
5
選擇業務類別，並加入企業標誌，以建立商業檔案





6

設定 6 位數字密碼



7

驗證電郵地址



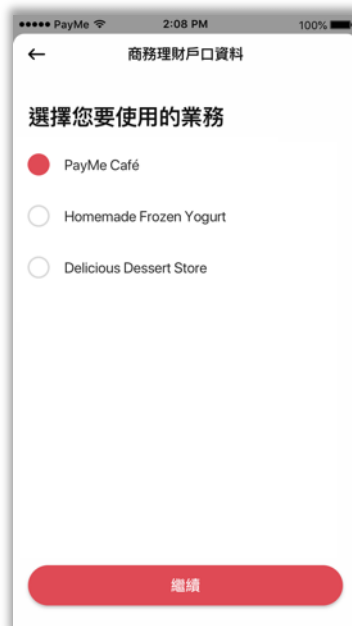
8

輸入滙豐商務「網上理財」用戶名稱



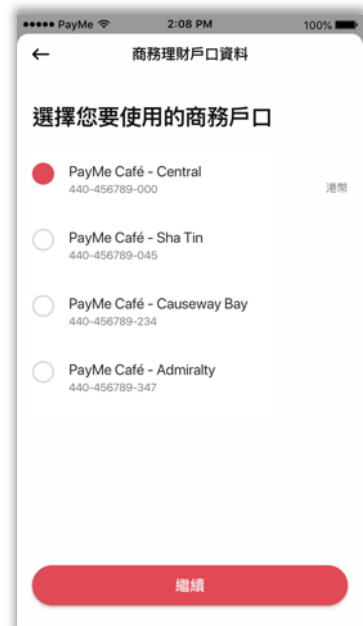
9

輸入滙豐商務「網上理財」密碼，並透過保安編碼器或 Business Express 應用程式進行驗證



10

選擇您要使用的業務



11

選擇商務銀行戶口



12
成功註冊！

IV. 訂製 PayCode



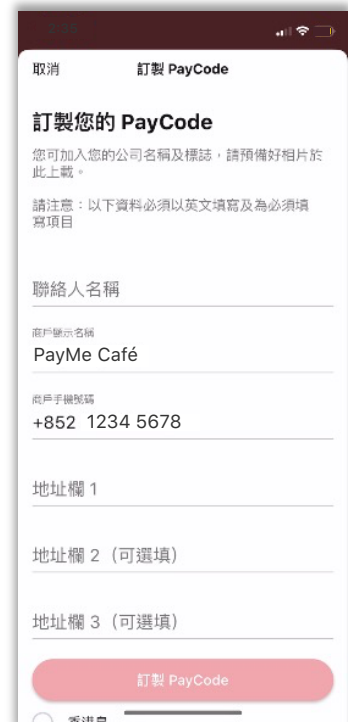
1

點按「訂製 PayCode」



2

點按「訂製 PayCode」



3

輸入所需資料（必須以英文填寫），聯絡人姓名及手提電話號碼將會作送遞用途。如你並未上載公司標誌，便會看到上載標誌的部分。



4

如你並未上載公司標誌，於此上載圖片



5

成功訂製 PayCode

重新訂製 PayCode



1

點按「訂製 PayCode」



2

點按「發送查詢」



3

輸入所需資料：

- 聯絡人姓名 (須以英文填寫)
- 聯絡電話作送遞用途
- 地址 (須以英文填寫)
- 所需的 PayCode 貼紙/ 座架 / 「接受 PayMe 付款」貼紙數量



4

成功訂製 PayCode

V. 收款

PayMe for Business 提供以下 4 種收款方式：

1) 動態 PayCode:

由商戶輸入收款金額的單次有效 QR 碼

2) 動態 Paylink：

由商戶輸入收款金額，並透過通訊應用程式發送單次有效連結

3) 靜態 PayCode：

商戶專屬的 QR 碼，付款金額由顧客輸入

4) 靜態 PayLink：

商戶專屬的收款連結，並透過通訊應用程式發送，付款金額由顧客輸入

1) 動態 PayCode:

由商戶輸入收款金額的單次有效 QR 碼



1

輸入交易金額



2

輸入給客戶的訊息及內部參考編號
(非必要)



3

應用程式將即時生成動態 PayCode
讓客戶掃描付款

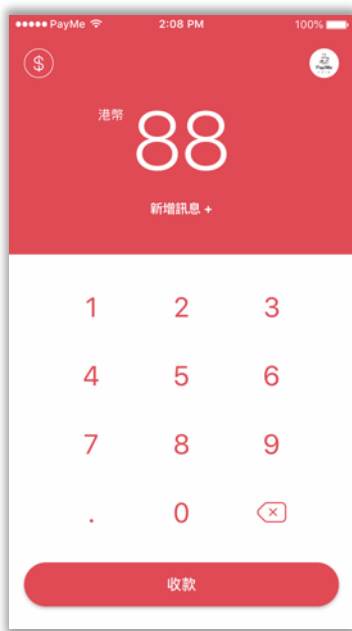


4

成功收款！

2) 動態 Paylink :

由商戶輸入收款金額，並透過通訊應用程式發送單次有效連結



1

輸入交易金額



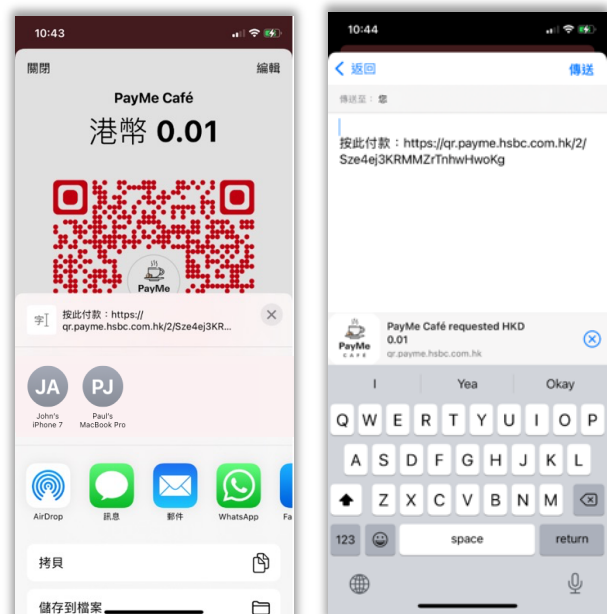
2

輸入給客戶的訊息及內部參考編號
(非必要)



3

應用程式將即時生成動態 PayLink
讓客戶掃描付款

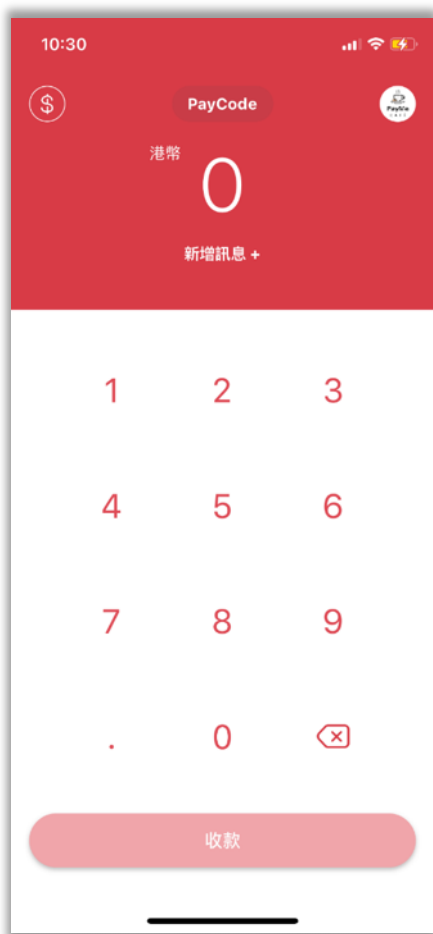


4

複製並透過 Whatsapp 或手機短訊分享
PayLink 客戶可隨時點按向 PayLink 您付
款

3) 靜態 PayCode :

商戶專屬的 QR 碼，付款金額由顧客輸入



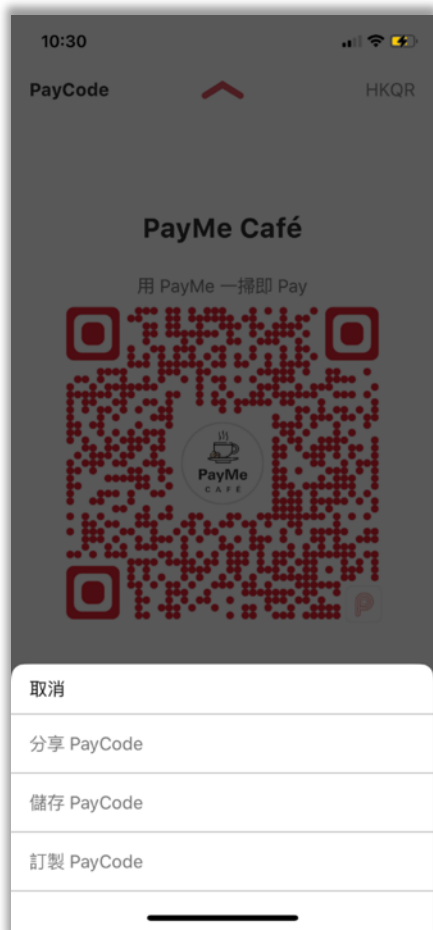
1

點按「PayCode」按鈕



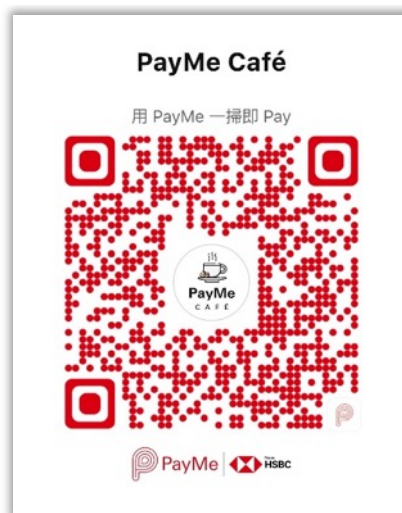
2

點按你的專屬 PayCode



3

點按「儲存」以儲存您的PayCode圖片作日後收款之用；
或點按「訂製」以獲取實體PayCode放置於店內

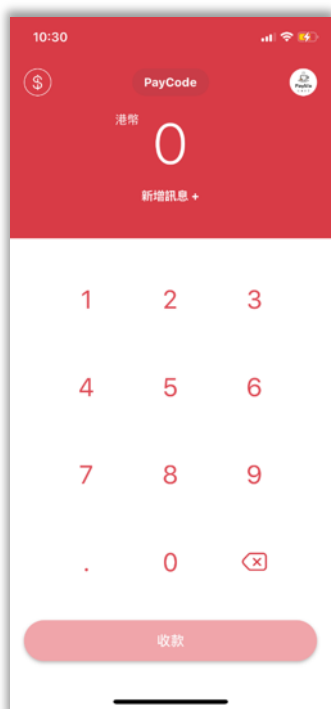


4

客戶可掃描您的，然後自行輸入金額進行付款

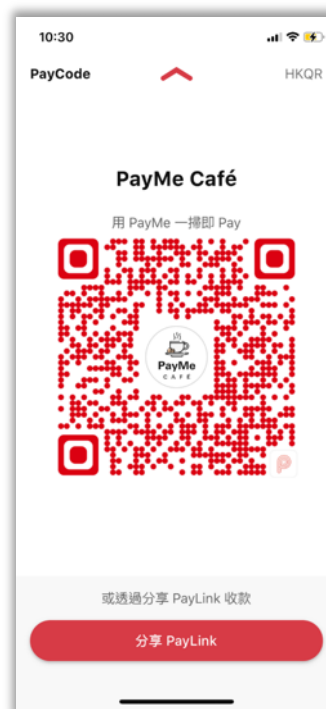
4) 靜態 PayLink :

商戶專屬的收款連結，並透過通訊應用程式發送，付款金額由顧客輸入



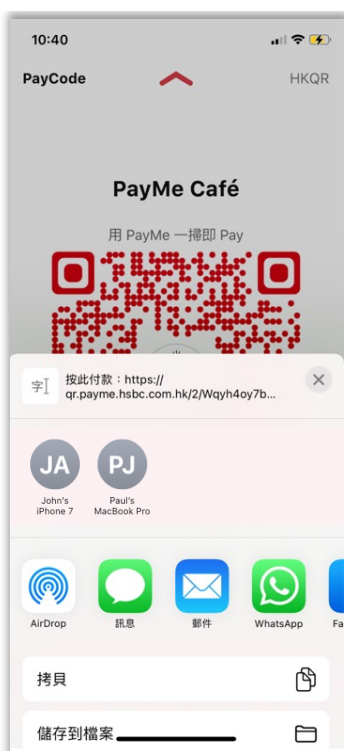
1

點按「PayCode」按鈕



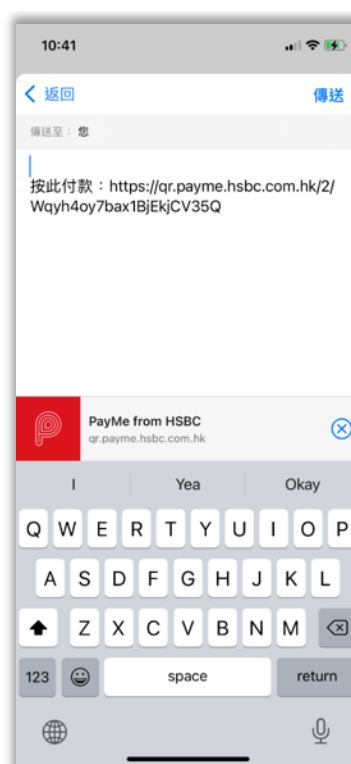
2

然後點按「分享 PayLink」



3

複製並透過 Whatsapp 或手機短訊分享 PayLink



4

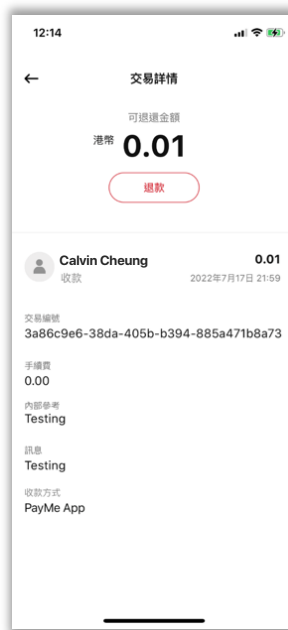
客戶可隨時點按向 PayLink 您付款

VI. 退款



1

點按您想退款的交易



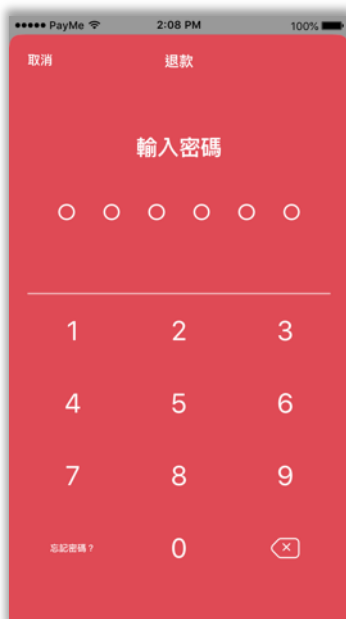
2

點擊「退款」



3

輸入退款金額，可以進行全額退款或部分金額退款



4

輸入密碼



5

完成退款！

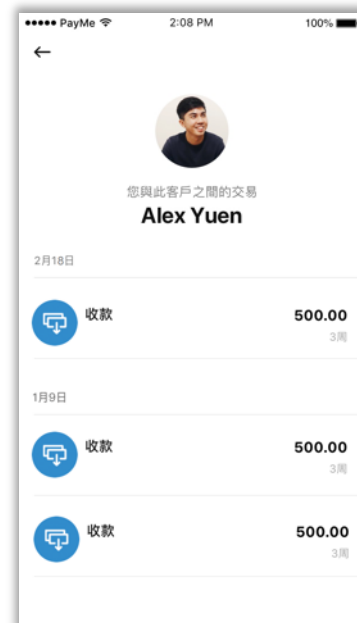
想更快找到交易紀錄進行退款？



1
點擊「退款」



2
掃描退款客人的 PayCode



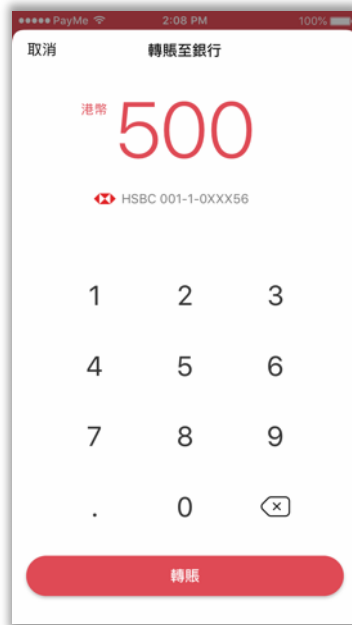
3
即可選取交易進行退款

VII. 轉賬至銀行



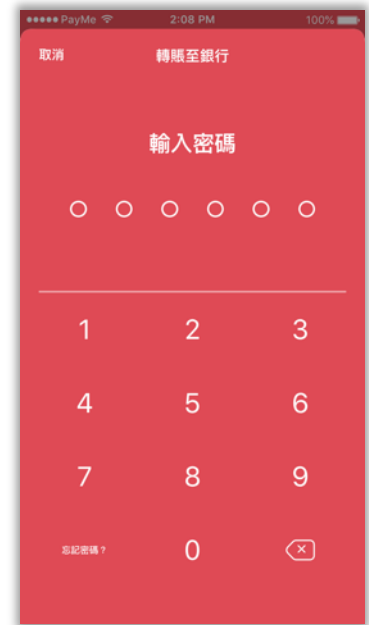
1

點擊「轉賬至銀行」



2

輸入金額



3

輸入密碼



4

轉賬成功！

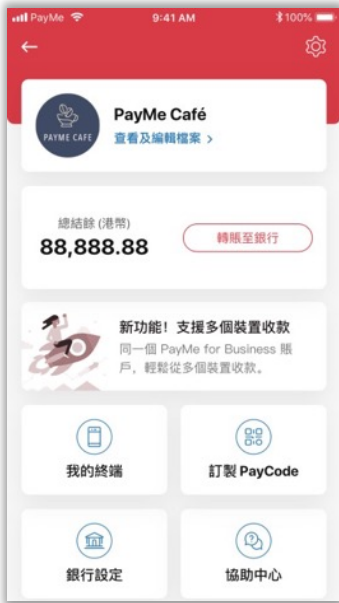


5

您可於應用程式內查看交易紀錄



VII. 轉賬至銀行 (預設自動轉賬)



1

點擊「銀行設定」



2

點擊「預設自動轉賬」



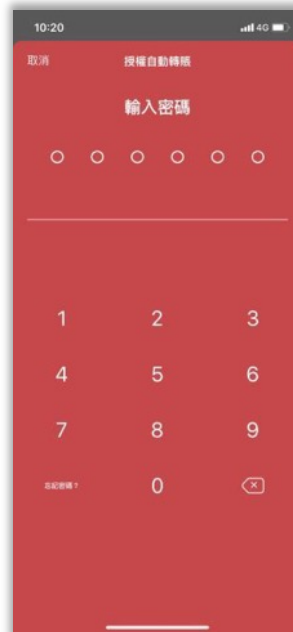
3

選擇周期



4

選擇時間



5

輸入密碼



VIII. 報告及分析



1

有了 PayMe for Business
所有業務動態觸手可及



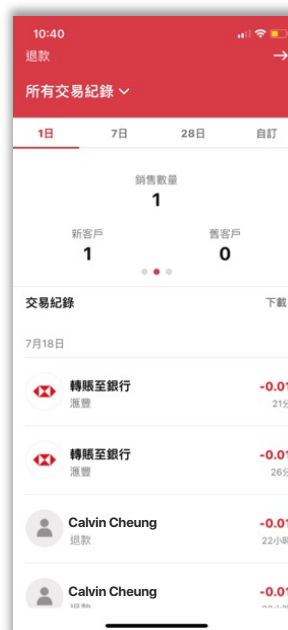
2

您可以選擇查看 1 天、7 天、28 天
或最多 365 天的交易紀錄



3

於上圖紅框位置向左掃一下，以查看
更多業務洞察分析



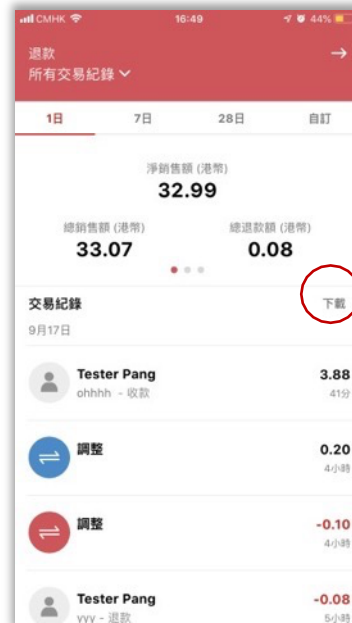
4

您可查看平均銷售額和及顧客數量



5

再向左掃以查看選擇日期範圍的淨收入
和手續費



6

點按匯出圖標
將交易紀錄下載為 CSV 檔案



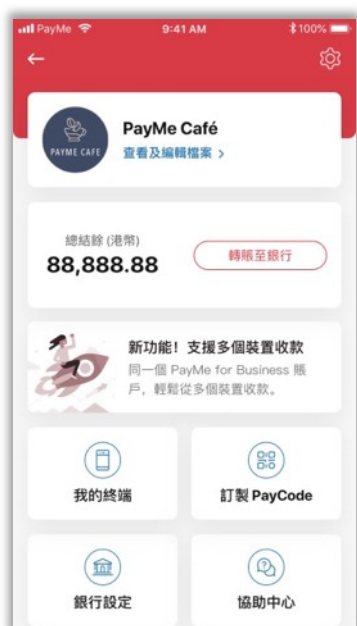
7

發送至您的電郵、儲存或打印

IX. 需要幫助

如您遇上問題或需要協助，可參考應用程式內協助中心的常見問題。

如找不到您需要的資料，只需要點按「想與我們聯絡」，便可以在應用程式內發出查詢。PayMe 團隊會在 1-2 個工作天內回覆。如有緊急的查詢，亦可在星期一至星期日早上 9 時到下午 6 時期間致電 2233-3070。



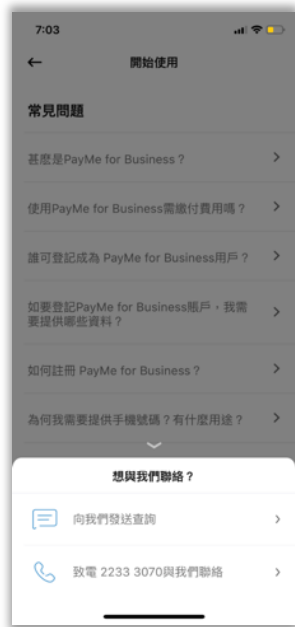
1

點按「協助中心」



2

查看常見問題



3

可以發送查詢或直接致電聯絡我們



4

提交查詢

X. 讓顧客知道您接受 PayMe 付款

請送我一份迎新禮包！

如果您已註冊 PayMe for Business 賬戶，您即將會收到我們的迎新電郵。您只需按照指示填妥表格，以登記您的收件地址，我們便會將迎新禮盒發送給您，其中包括特別為商戶而設的禮品和配件，讓您的顧客知道您已接受 PayMe 付款。

迎新禮盒內包括：



- 櫥窗貼紙
- 收銀機貼紙
- PayCode 貼紙

一切已經就緒，讓您準備迎接全港 280 萬名正準備用 PayMe 消費的顧客！

XI. 終端管理

全新終端管理功能，讓您從多個終端或裝置收款及/ 或退款。新終端管理，讓你的員工開始收款，而讓您只需透過計劃案您的手機，便可輕鬆管理所有終端。

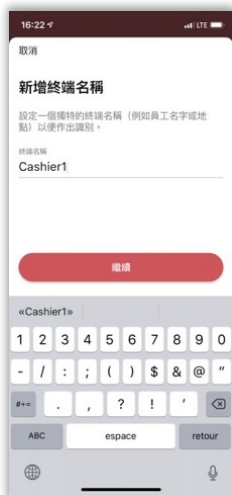
首次建立終端

(PayMe for Business 帳戶持有人或業務負責人)



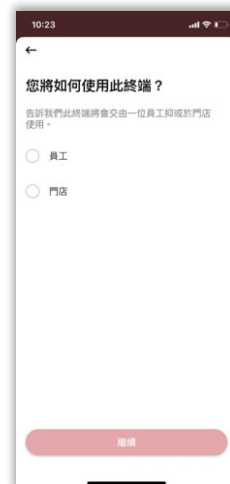
1

點按你的商業檔案標誌 > 「管理終端」。您可建立最多 50 個終端。



2

輸入終端名稱，可以是員工名字或門店地點。



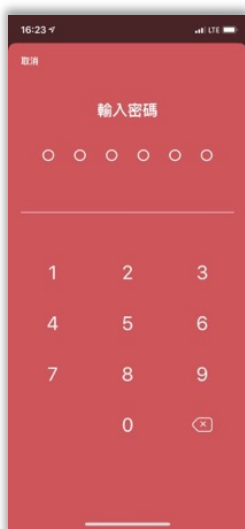
3

設定終端用途，可選員工或於指定門店使用。



4

如需要員工處理退款，您可為每個終端啟動退款功能，亦可設定能否查看所有交易紀錄。



5

輸入密碼，建立 QR 碼以啟動新終端。



5

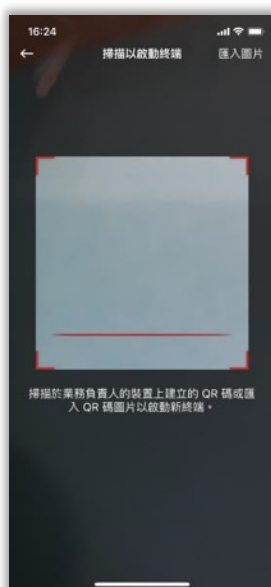
建立 QR 啟動碼後，使用該新增終端掃描以啟動。您亦可儲存此 QR 啟動碼為圖片，並透過短訊或 WhatsApp 分享。

啟動新終端（員工/ 新增終端用戶）



1

新增終端用戶下載 PayMe for Business 應用程式，按「連結新增終端」。



2

掃描或匯入業務負責人建立的 QR 碼。



3

新增終端現已可收款及退款（如啟動了退款功能）。

終端用戶管理



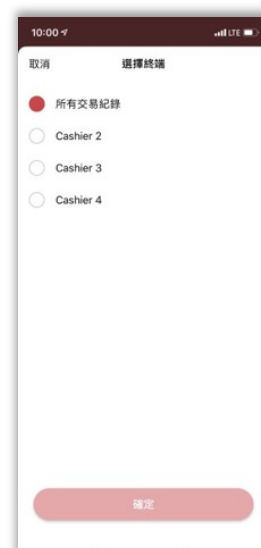
1

如要查看銷售報告及活動紀錄，可前往「交易紀錄」並選擇「本終端」以瀏覽此終端的交易紀錄。



2

如主用戶要查看所有終的交易紀錄，點按「所有交錄」。



3

點按「所有交易紀錄」後，您可選擇查看所有終端或個別終端的交易紀錄

XII. PayMe for Business 網上管理平台

現在，您可以隨時隨地、輕輕鬆鬆管理 PayMe for Business 的交易。您可透過此專用網站進入我們的網上管理平台，所有 PayMe for Business 客戶均可免費使用。

無論您是使用 PayMe for Business 應用程式、流動/ 網頁版收款，或是 POS 終端機收款，您都可以透過網上管理平台實時查看及管理交易。

開始使用 PayMe for Business 網上管理平台



1

輸入您的 PayMe for Business 電郵地址手機號碼，然後點按「啟用賬戶」



2

輸入發送到您手機號碼的驗證碼。



3

您將收到一封驗證電郵，透過 Chrome、Safari 或 Fire fox 瀏覽器，點按電郵上的連結以建立網上平台管理密碼。



4

輸入並確認網上管理平台密碼。

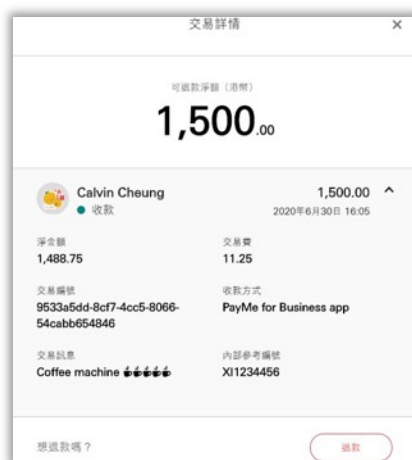
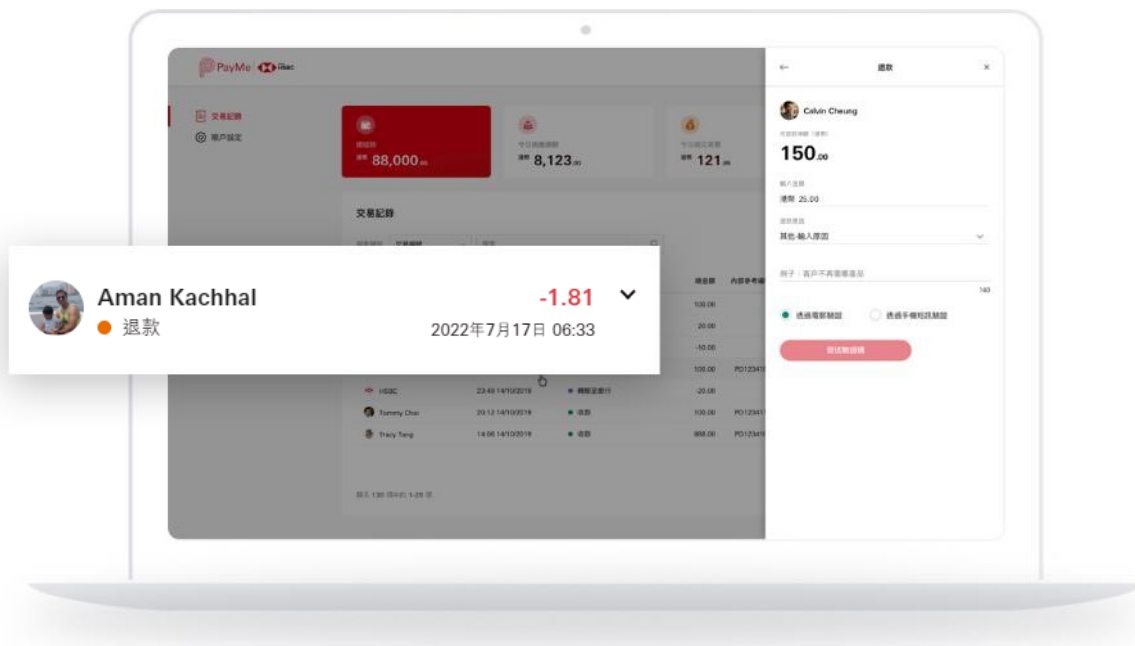


5

輸入您的電郵地址及網上管理平台密碼以登入賬戶。

PayMe for Business 網上管理平台 — 退款

退回透過 PayMe for Business 應用程式、流動/ 網頁版收款，或是 POS 終端機收取的款項。無需任何額外的系統整合，只需登入網上管理平台便可管理款。



1

點按任何一項交易以查看更多詳情，然後按「退款」

← 退款 ×

Calvin Cheung

可退款淨額 (港幣)

1,500.00

輸入金額

HKD 100.00

退款原因

透過電郵驗證 透過手機短訊驗證

發送驗證碼

2

輸入金額—您可進行全額或部分退款。

← 退款 ×

請輸入我們透過電郵向您發送的驗證碼

****afe@gmail.com**

14 秒後重新獲取驗證碼

驗證

退款 ×

成功！您已退還

港幣 0.10 元

交易編號: 2b9be48e-cda2-4949-9c34-9610694e0faa 日期及時間: 2020年7月31日 19:59

3

輸入電郵或手機短訊上的驗證碼後，退款便完成

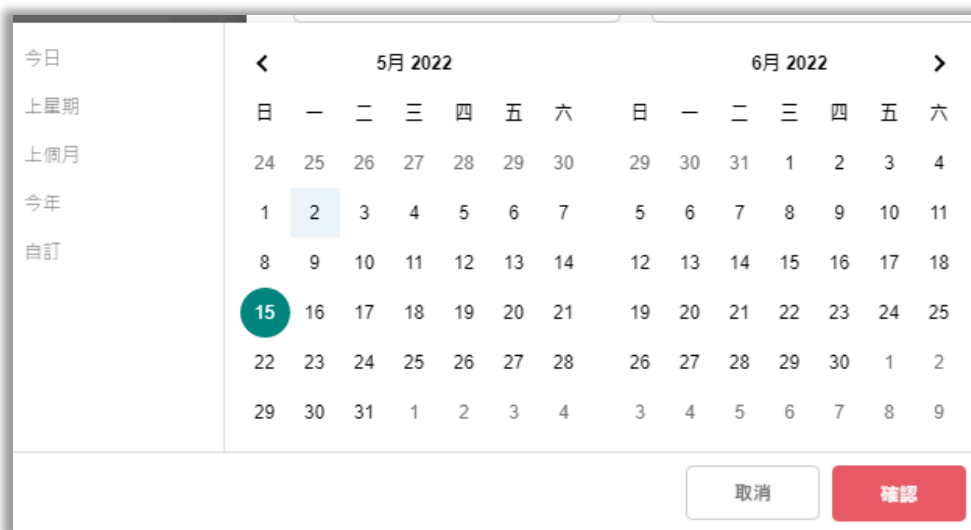
PayMe for Business 網上管理平台 - 報告及分析

PayMe for Business 網上管理平台為您總結交易及銷售表現，數據一覽無遺，助您制定相應策略。



1

點按「篩選」以選擇您想查看的交易，或按「下載」以獲取交易報告。



2

選擇「自訂」以設定查看長達 365 日的交易。

PayMe for Business 網上管理平台 - 交易紀錄

交易紀錄

1

選取「交易編號」，然後輸入完整的交易編號以搜索過往的交易紀錄。

或

選取「內部參考編號」，然後輸入內部參考編號以搜索過往的交易紀錄。

PayMe for Business 網上管理平台 - 「轉帳至銀行」的報告

轉帳至銀行摘要
如需編輯自動轉帳的週期和時間，請使用 PayMe for Business 應用程式。

週期	時間
每日	13:00
最低結餘	銀行戶口
港幣 0.00	賬號 018-890XXX-XXXX

轉帳至銀行詳情

日期及時間	轉帳類別	轉帳至銀行金額	期末結餘	報告
2020年8月25日 17:00	自動	0.00	0.00	📄 報告可供下載
2020年8月24日 17:00	自動	0.00	0.00	📄 報告可供下載
2020年8月23日 17:00	自動	599.00	0.00	-
2020年8月21日 17:00	自動	992.87	0.00	📄 報告可供下載
2020年8月21日 16:48	手動	0.01	992.87	-
2020年8月20日 19:00	自動	0.00	0.00	📄 報告可供下載

現在，您可以下載轉帳至銀行的報告，報告會列出每次預設的自動銀行轉帳之間的所有交易。

這個功能如何協助我對賬？

現在應用程式或網上管理平台的交易報告，會根據你所指定的日期規範或者所提供有交易的表列。

如果你再配對某次自動銀行轉帳中的收款或退款方面遇到困難，新報告就能讓你更輕鬆地查核那些交易的賬。

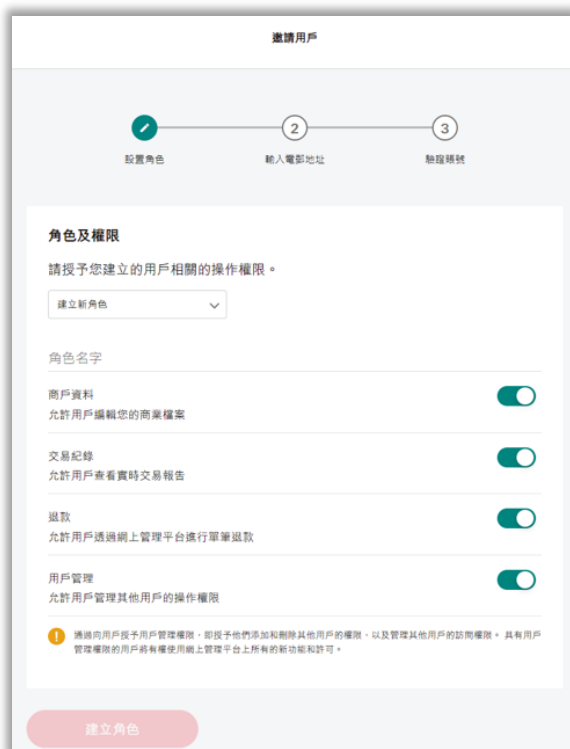
新的報告僅顯示每次轉帳指示之涵蓋的交易你無需再查個別銀行交易的賬目。

邀請子用戶



1

點入「用戶管理」頁面上的「用戶管理」分頁，再點按「邀請用戶」



2

建立角色

設置角色 輸入電郵地址 驗證賬號

角色及權限

您已經創建了 **Admin2**

- 交易紀錄
- 撥款
- 用戶管理

透過電郵邀請

您一次最多可以邀請 10 個用戶，請在下面輸入用戶的電郵地址。

電郵地址 (請用逗號分隔)

驗證

選擇透過電郵或手機短訊進行驗證，以繼續操作。

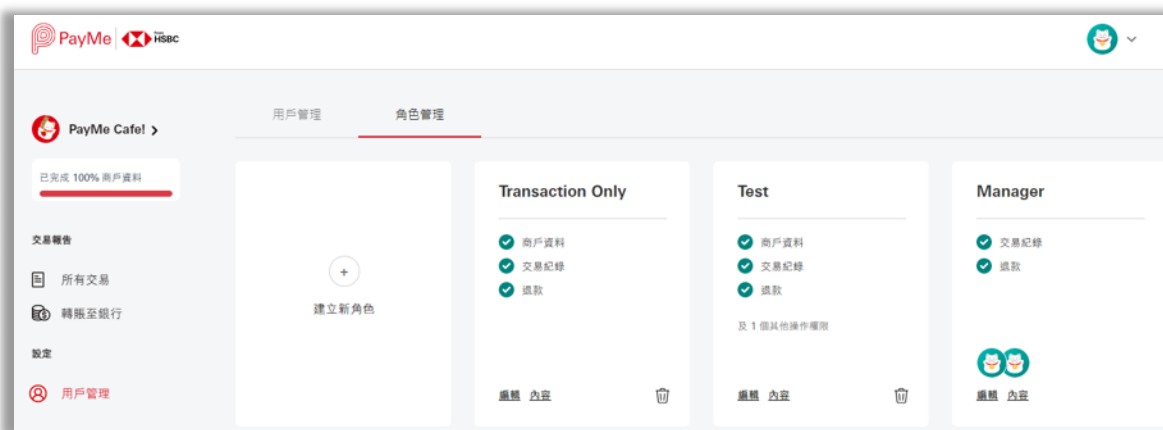
- 透過電郵驗證
- 透過手機短訊驗證

發送驗證碼

3

點擊用戶管理頁面上的邀請用並完成身份認證

1. 角色管理



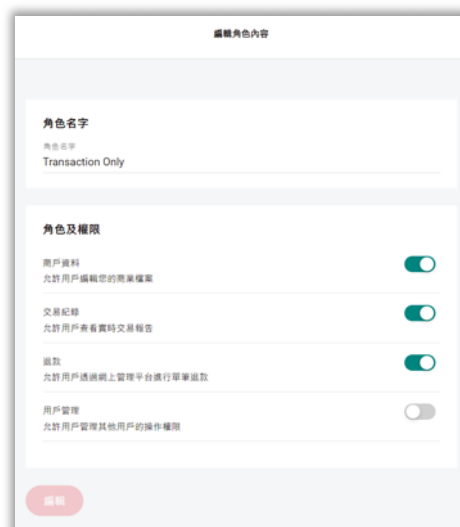
在「用戶管理」頁面上，選取「角色管理」分頁

建立新角色



建立「新角色」

編輯角色



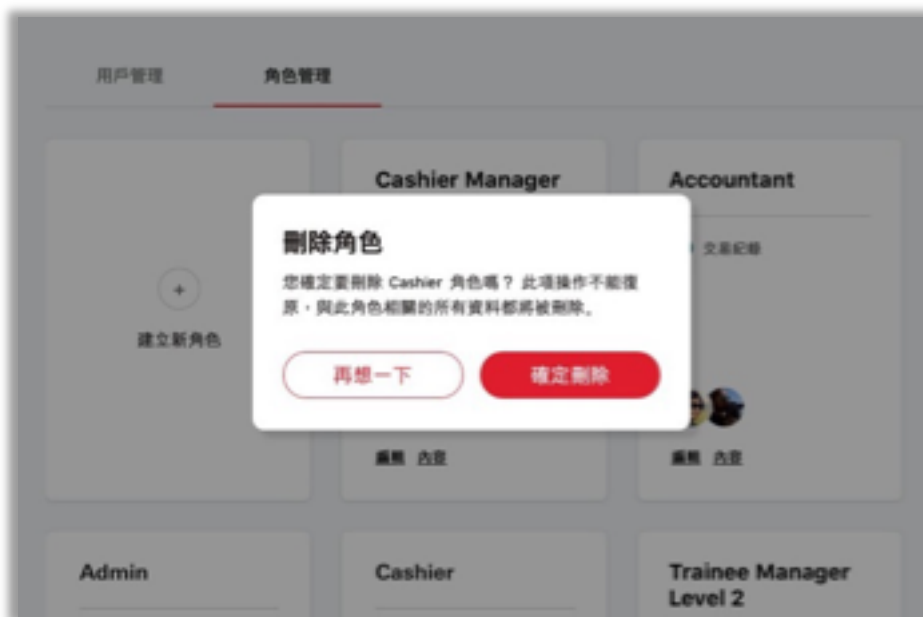
在任可一角色上點按編輯

查看子用戶資料



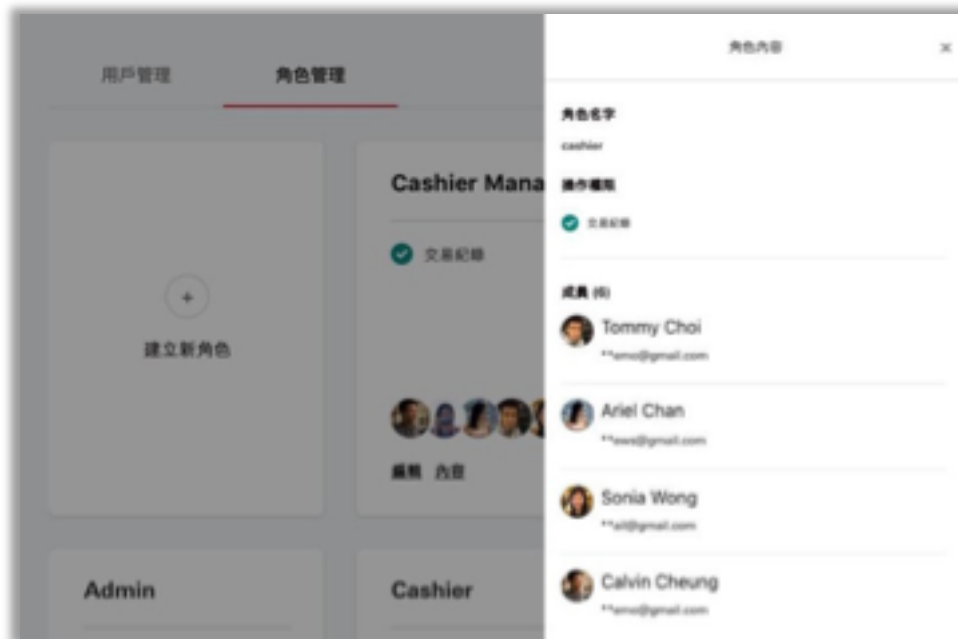
在「角色管理」分頁>點按角色的「內容」，選取用戶。

刪除角色



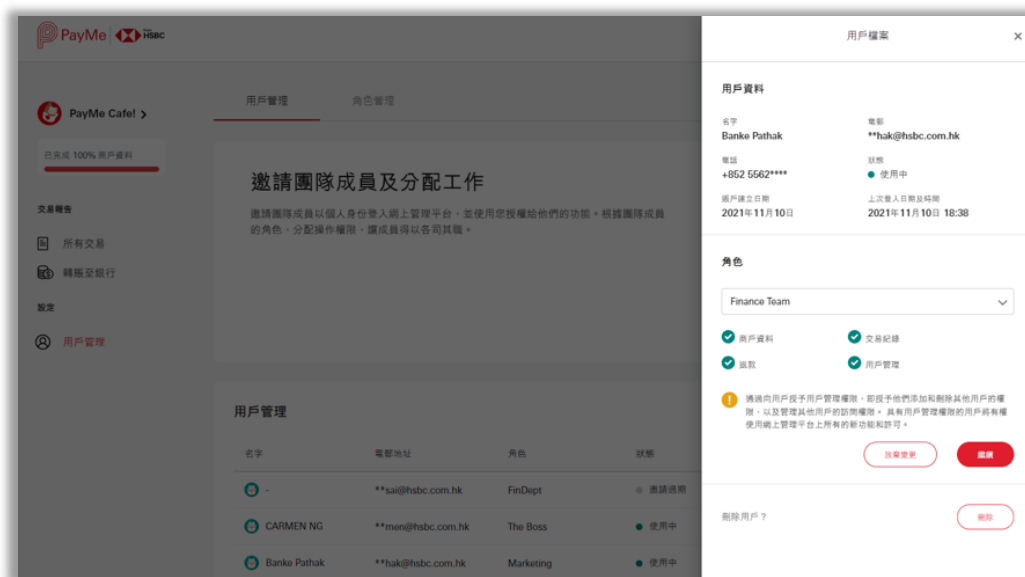
在「角色管理」分頁>點按「刪除」圖示

查看角色內容



在「角色管理」分頁，點按角色上的「內容」

管理子用戶操作權限



在「用戶管理」分頁>選取子用戶>選取另一個角色>點按繼續>透過手機短訊或電郵進行驗證>確定

刪除子用戶

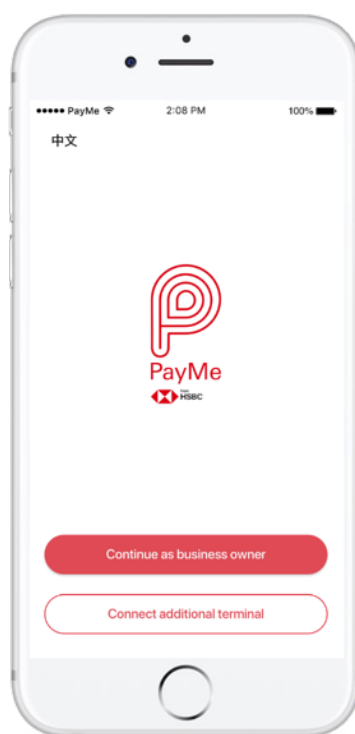


在「用戶管理」分頁>選取子用戶>刪除

I. Introduction

PayMe for Business is open for business and we know you're keen to start collecting payments from over 2.8 million PayMe users. So to make sure your business hits the ground running, we've put together this guide to the key features that will ensure you get started in no time!

For PayMe for Business Terms and Conditions, please visit <https://payme.hsbc.com.hk/en/business-terms-and-conditions> or contact us for details.



PayMe for Business is only available to HSBC Business Internet Banking customers. Currently we enable one company to create one PayMe for Business account, which is linked to a bank account at sign-up. If you have multiple stores, we recommend that you use the terminal management function.

Sign up for HSBC Business Internet Banking

If you're an HSBC Commercial Banking customer but haven't signed up for Internet Banking yet, you can do so here <http://www.business.hsbc.com.hk/bib> to make sure you can use PayMe for Business.

Sign up for HSBC Commercial Banking

If you are not a HSBC Commercial Banking customer and you'd like to open an account or discuss how HSBC can help your business thrive, sign up here <http://www.business.hsbc.com.hk/biz-accounts> and we'll be in touch.

II. What you need to get started



1. **A business mobile device** to work as a terminal in the store.

You'll also need...

- A wifi or data connection
 - iOS 12.0 or Android 7.0 and above
 - Mobiles work best but we support tablets too
2. **A HK business mobile number** to serve as your log in ID and to send verification codes to, which will be required for future log in.
 3. **A business email address** we can send verification messages and transaction alerts to. This will also be needed to reset your PIN in the future.
 4. HSBC Business Internet Banking account details
 5. And **the Security Device** for that account

Some important points to remember

The mobile number you used to register for PayMe for Business will be used to send verification codes to for certain changes and when you log back into your account.

You'll set up a PIN when you sign up. This is required to authorise important transactions including:

- Refunds
- Transferring out funds to your business bank account
- Changing account details such as PIN, email or phone number

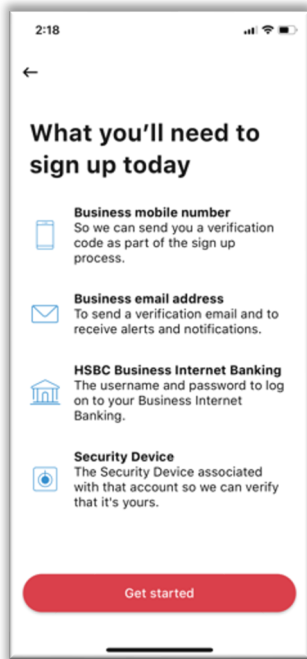
Download the app

Simply scan the QR code below to download the PayMe for Business app:

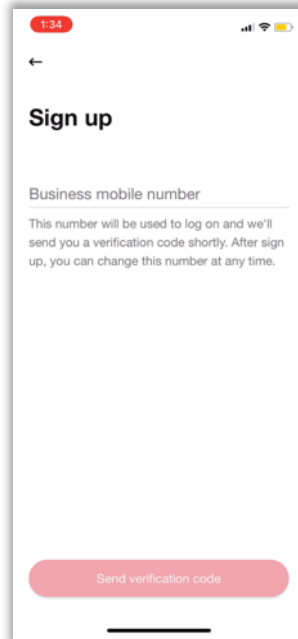


Or you can visit App Store or Google Play™ and search “PayMe for Business”.

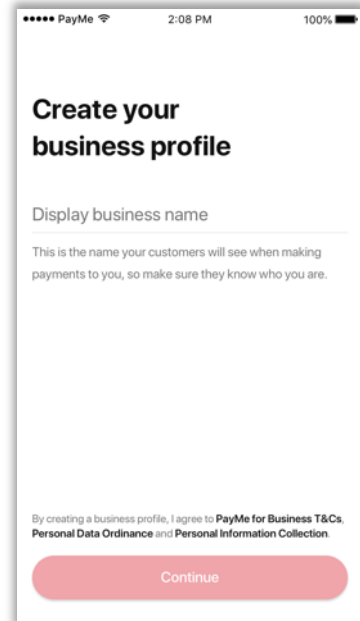
III. Registration



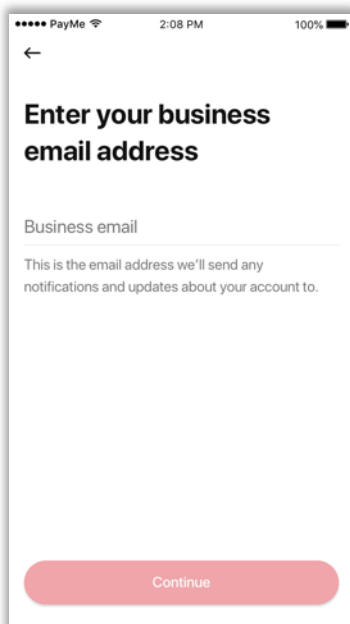
1
What you need to sign up



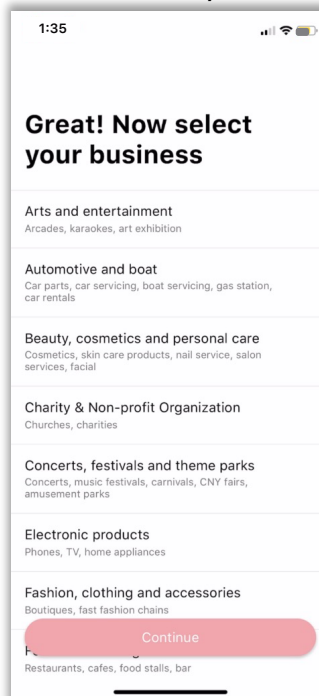
2
Enter your HK business mobile phone number and verify



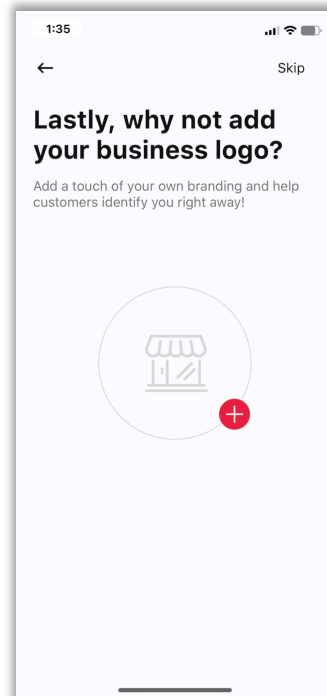
3
Enter your business name

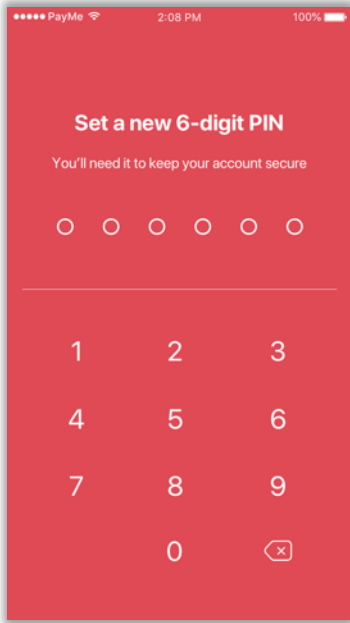


4
Enter your business email

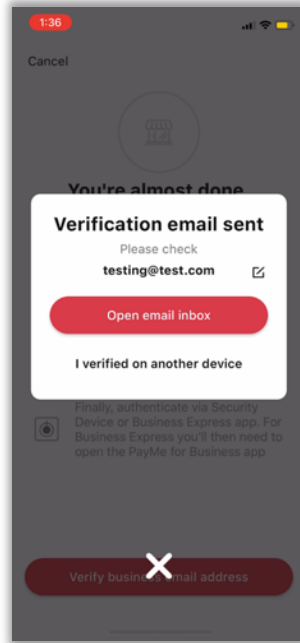


5
Choose your business category and add your logo to create your profile

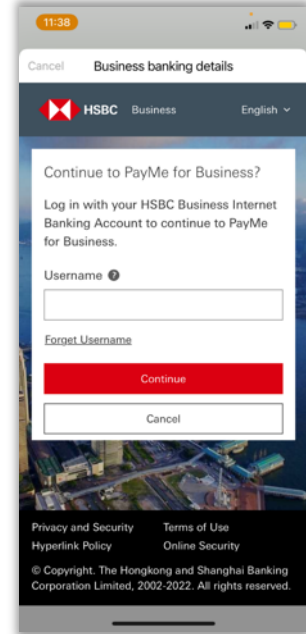




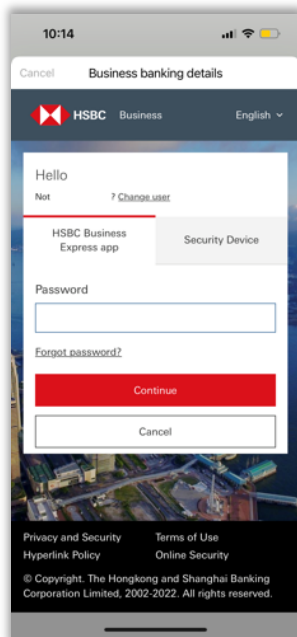
6
Create a 6-digit PIN



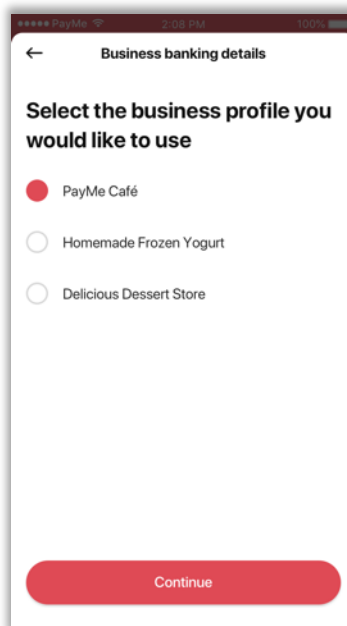
7
Verify your email



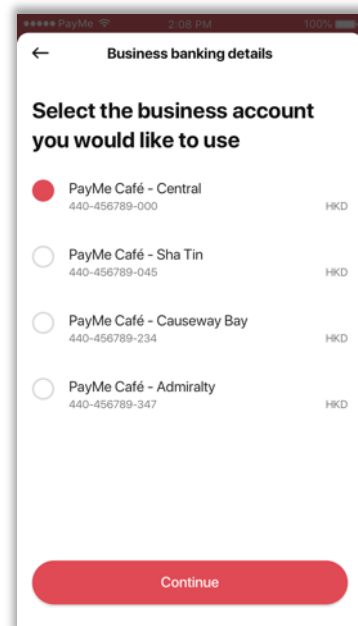
8
Enter your HSBC Business Internet Banking username



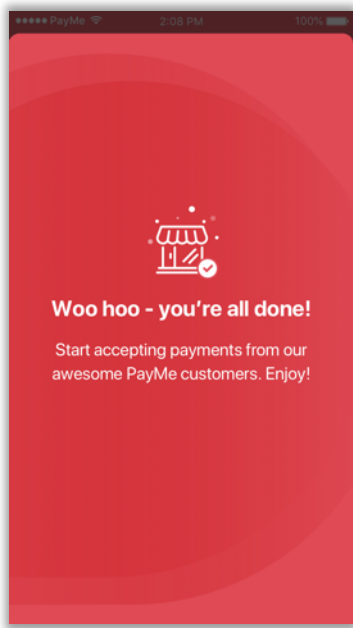
9
Enter your password and verify with your Security Device or through the Business Express App



10
Choose the business you want to use

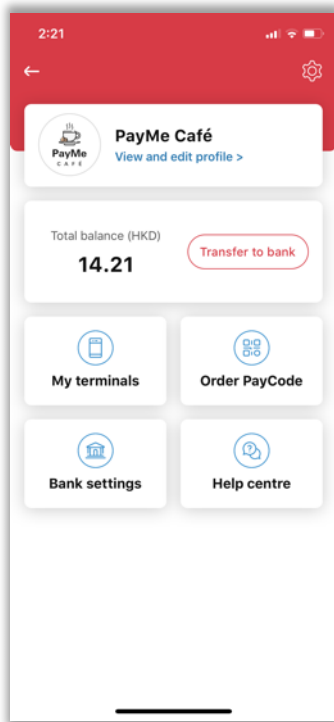


11
Choose the bank account you want to use



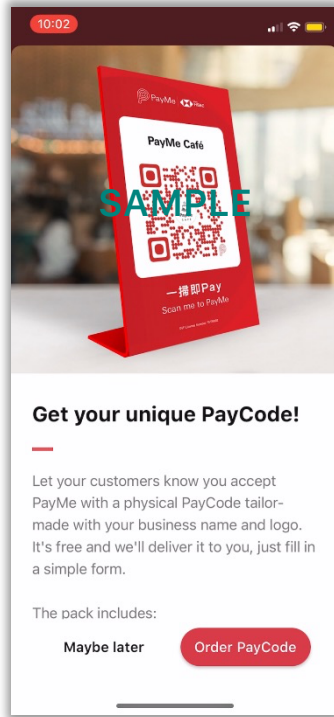
12
Set up complete!

IV. Order PayCode



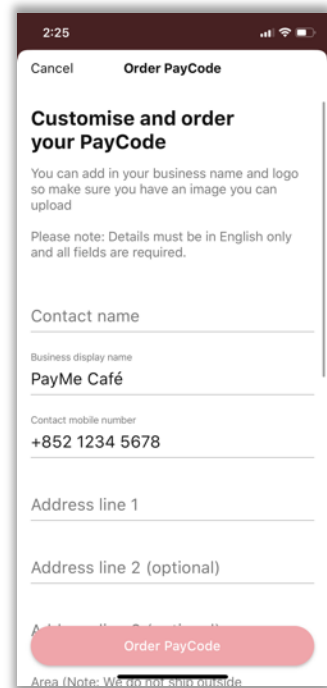
1

Tap on Order PayCode



2

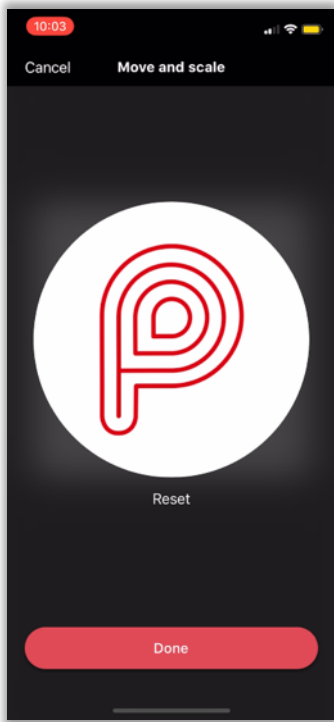
Tap on Order PayCode



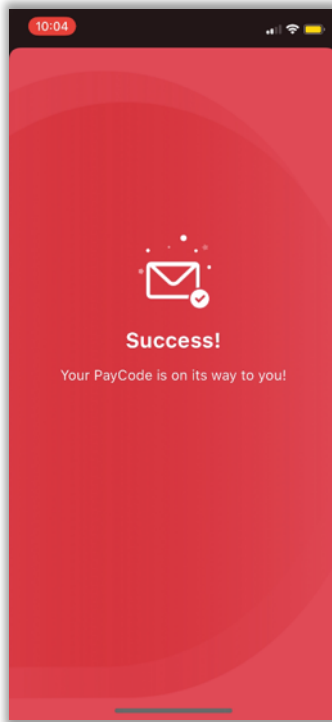
3

Input the info required in English only. Contact name and mobile number will be used for delivery purposes.

You will only see the business logo upload section if you haven't uploaded already

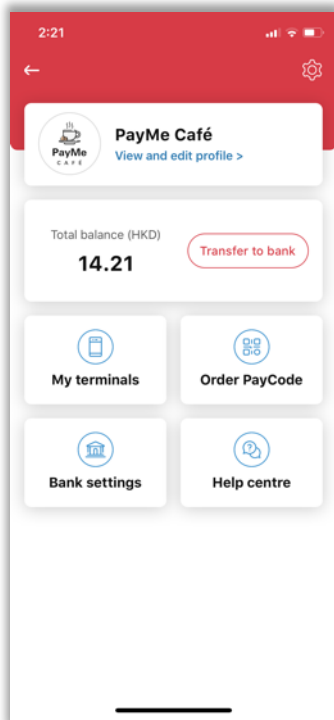


4
Upload your business
logo if you haven't done
so already

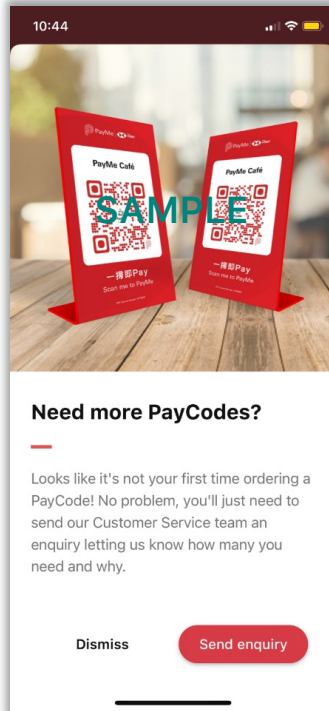


5
PayCode order placed
successfully

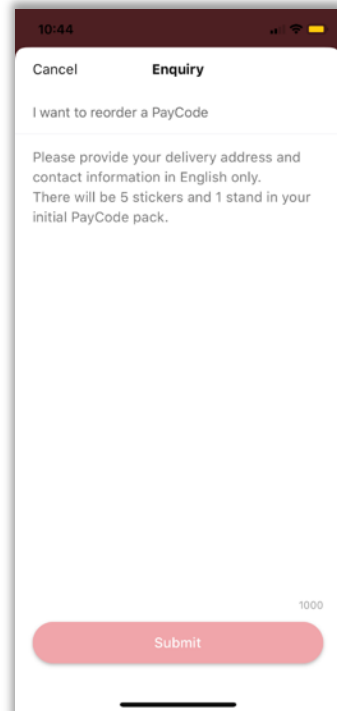
Reorder PayCode



1
Tap on Order PayCode

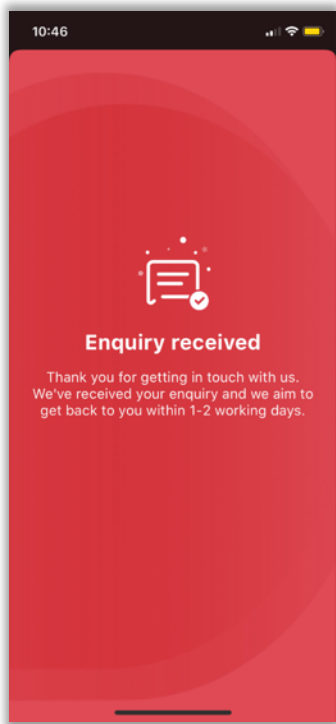


2
Tap on Order PayCode



3
Input the info:

- Contact name for delivery (EN)
- Contact number for delivery
- Address (EN)
- Quantity of PayCode stickers /Stand/"PayMe accepted here" stickers required



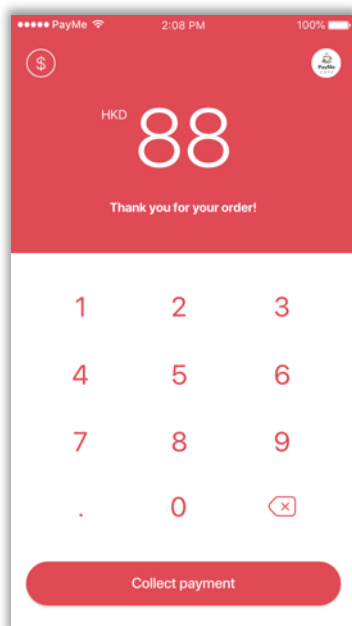
4
PayCode order placed
successfully

V. Payments

There are 4 ways you can collect payments with PayMe for Business

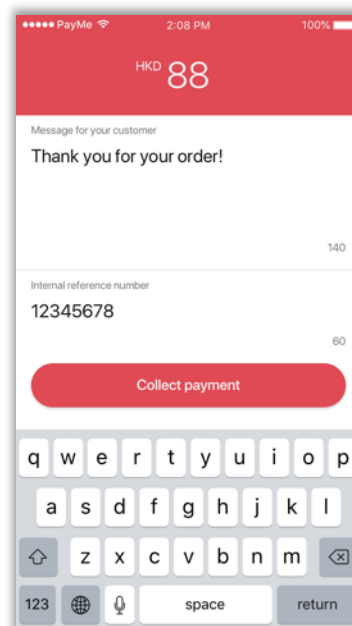
- 1) Dynamic PayCode (PayCode with the amount input by you)
- 2) Dynamic PayLink (can be sent via email, SMS, WhatsApp etc with the amount input by you)
- 3) Static PayCode (the unique PayCode of your business, amount input by customer)
- 4) Static PayLink (the unique PayLink of your business which can be sent via email, SMS, WhatsApp etc, amount input by customer)

1) Dynamic PayCode (PayCode with the amount input by you)



1

Enter the payment amount

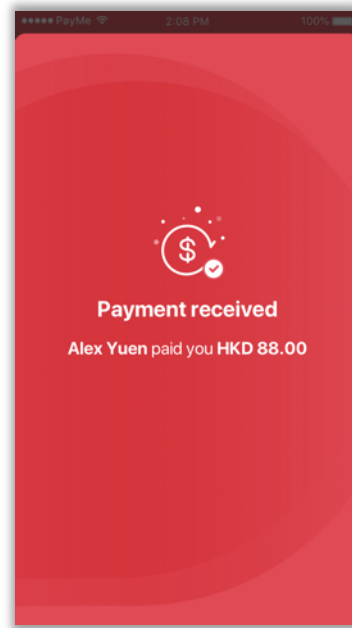


2

Input message to your customer and reference number (optional)

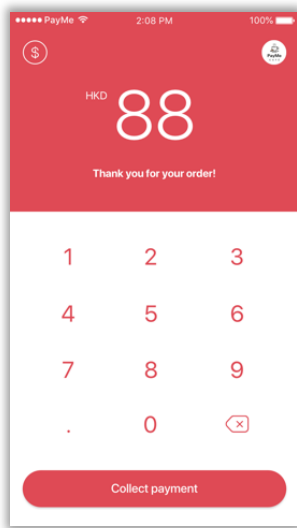


3
Dynamic PayCode generated and presented to customers for scanning



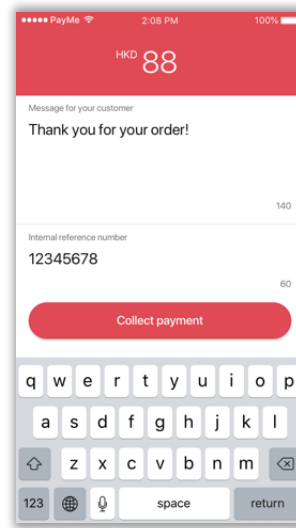
4
Payment received!

2) Dynamic PayLink (can be sent via email, SMS, WhatsApp etc with the amount input by you)



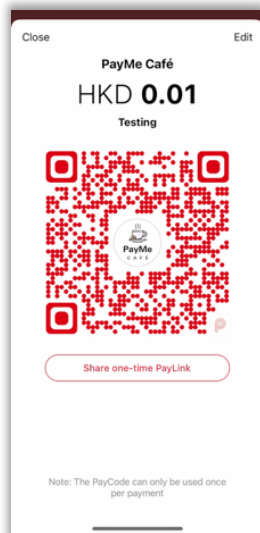
1

Enter the payment amount



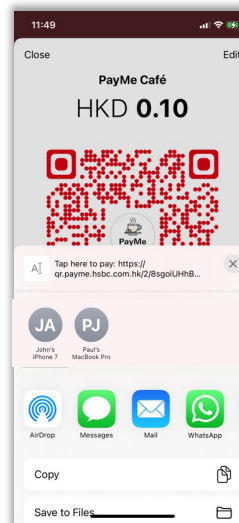
2

Input message to your customer and reference number (optional)



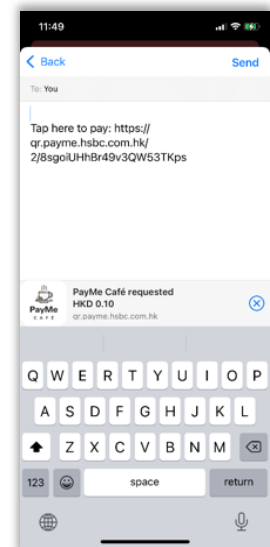
3

Tap Share one-time PayLink

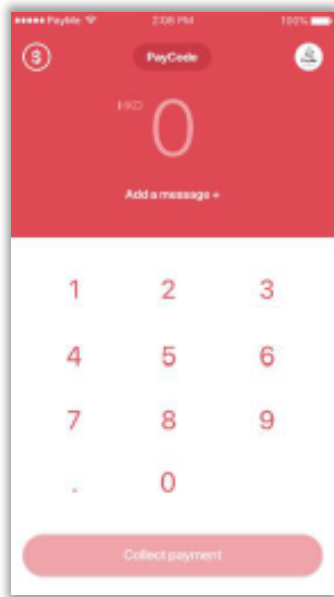


4

Copy and share the PayLink via WhatsApp or other messaging applications. Customers can pay your business by tapping the PayLink they receive



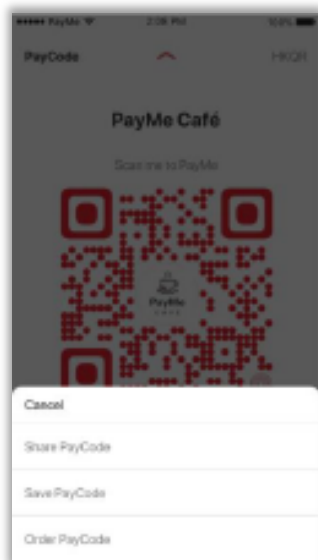
3) Static PayCode (the unique PayCode of your business, amount input by customer)



1
Tap on the PayCode button

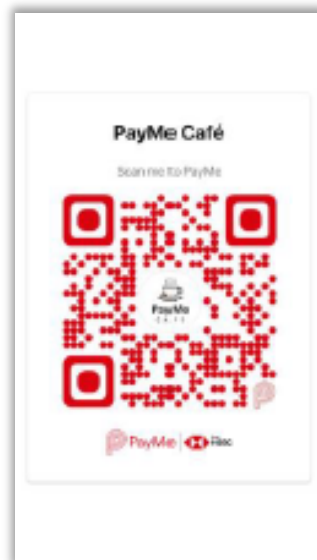


2
Tap on the unique PayCode



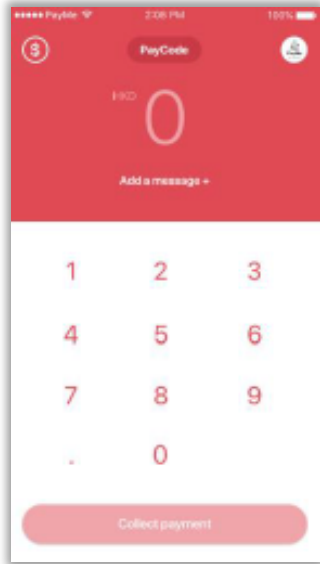
3
Tap Save to save your PayCode as an image for future use.

Tap Order to request a physical



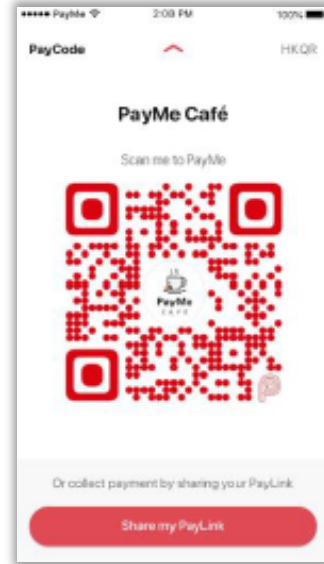
4
Payment received!

4) Static PayLink (the unique PayLink of your business which can be sent via email, SMS, WhatsApp etc, amount input by customer)



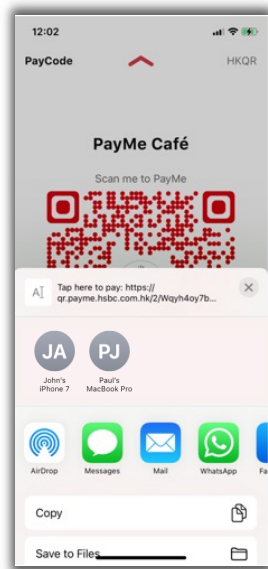
1

Tap on the PayCode button



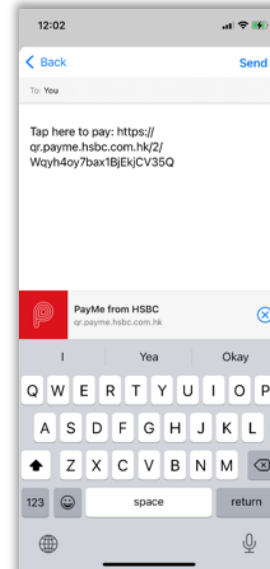
2

Tap Share my PayLink



3

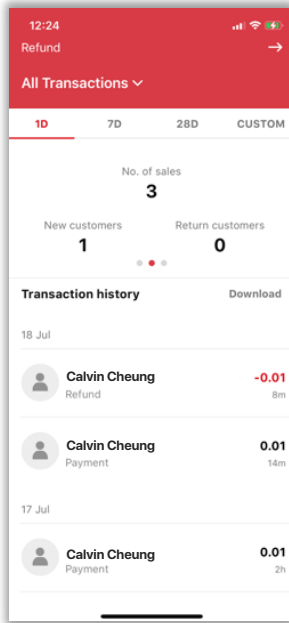
Copy and share the PayLink via WhatsApp or other messaging applications



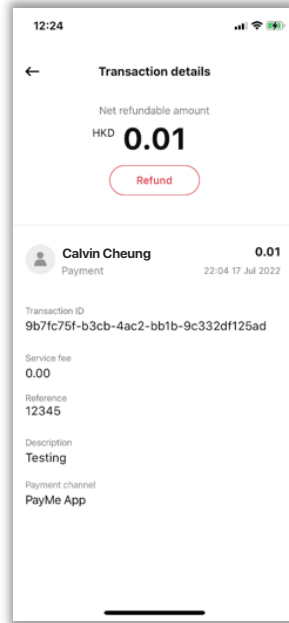
4

Customers can pay your business at any time by tapping the PayLink they receive

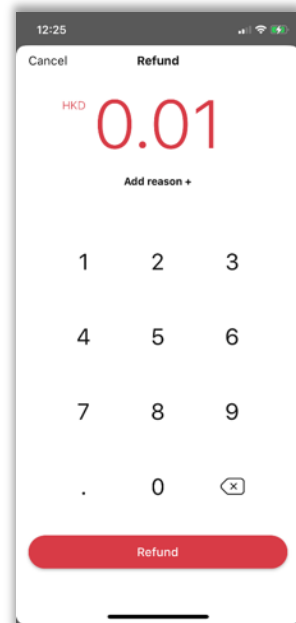
VI. Refunds



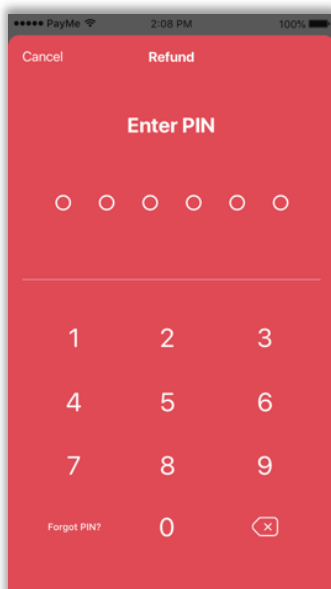
1
Choose the transaction
you want to refund



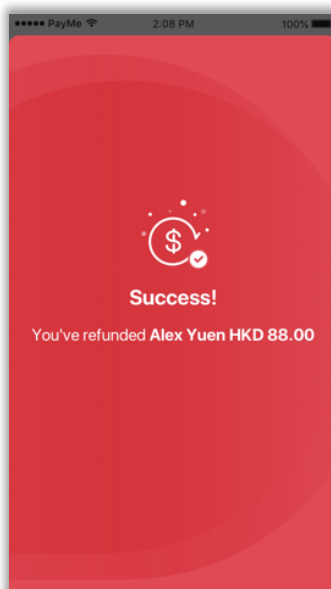
2
Tap 'Refund'



3
Enter the amount

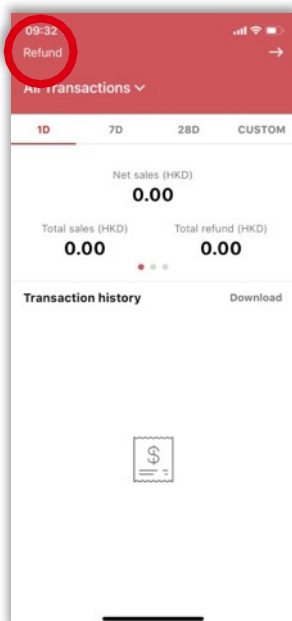


4
Enter your PIN

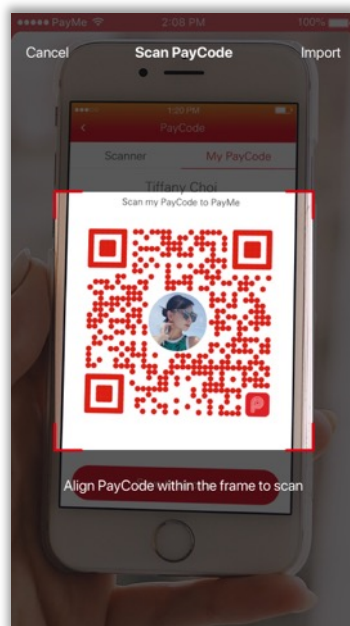


5
Refund complete!

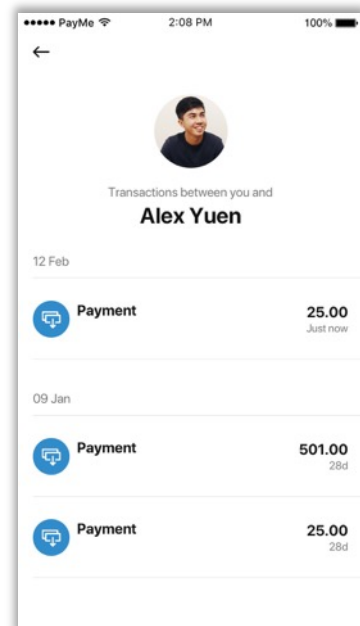
Want to find a transaction faster?



1
Tap 'Refund'

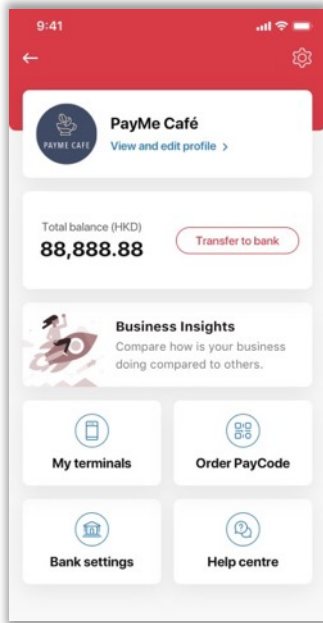


2
Scan the PayCode of the customer

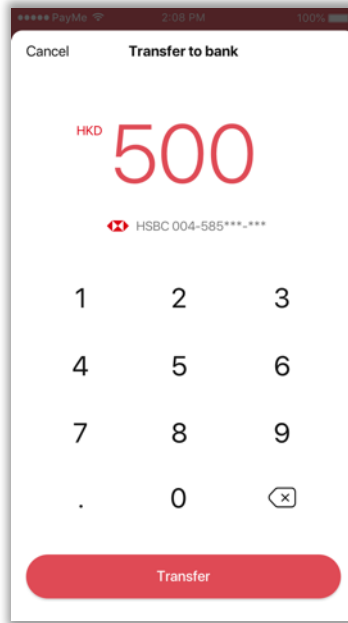


3
You will be able to see all the transactions with the selected customer

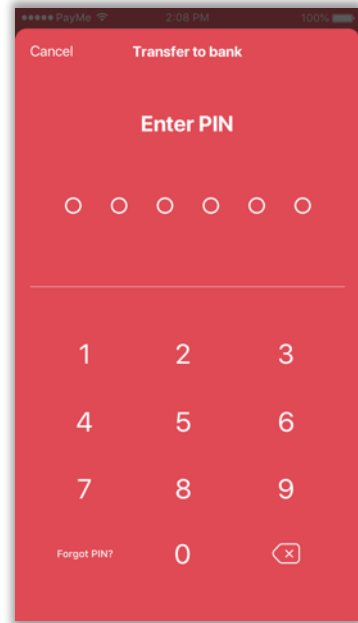
VII. Transfer to bank



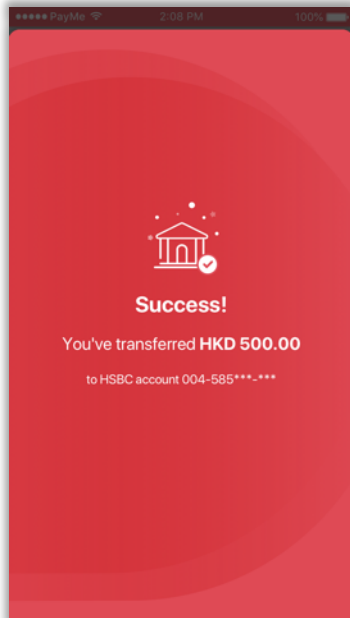
1
Tap 'Transfer to bank'



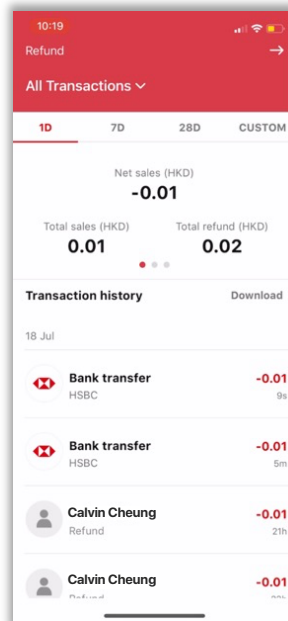
2
Enter the amount



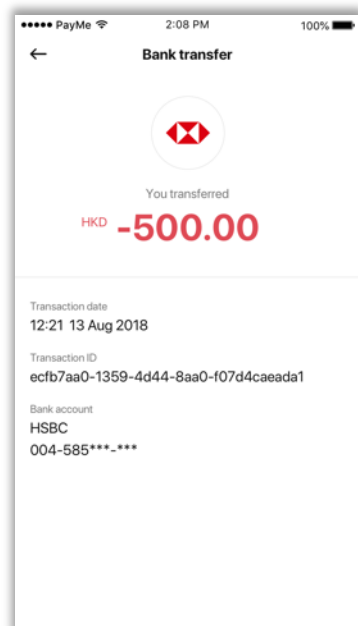
3
Enter your PIN



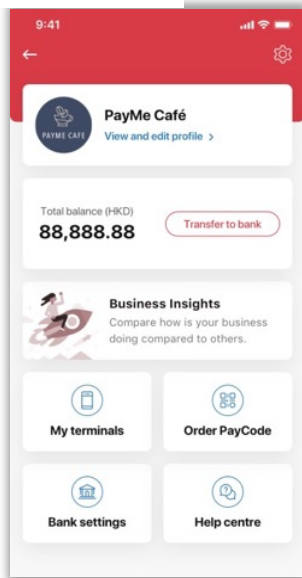
4
Transfer to bank complete!



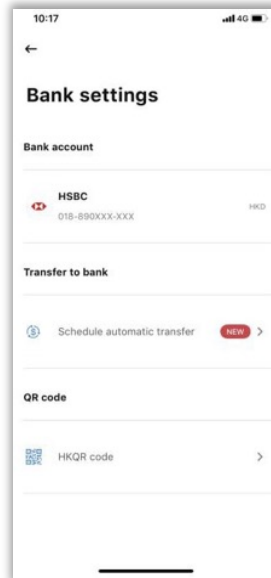
5
In-app transaction record available



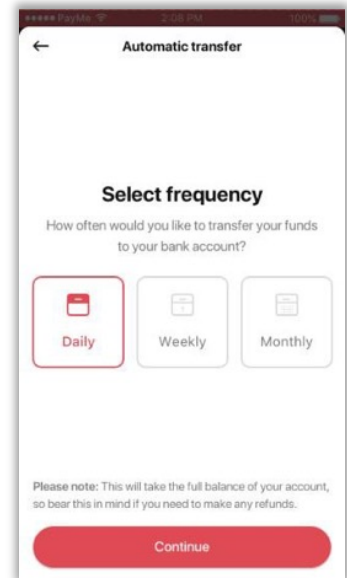
VII. Transfer to bank (automatic transfer)



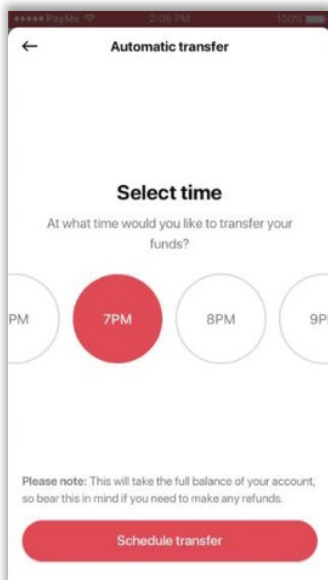
1
Tap "Bank Settings"



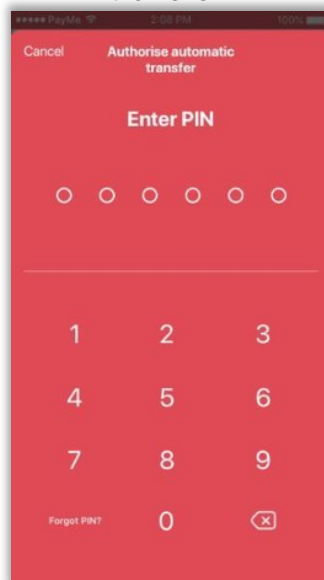
2
Tap "Schedule automatic transfer"



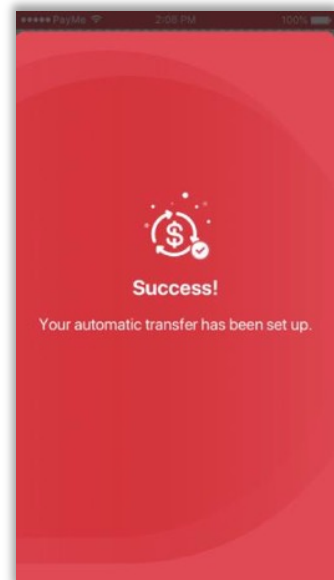
3
Select frequency



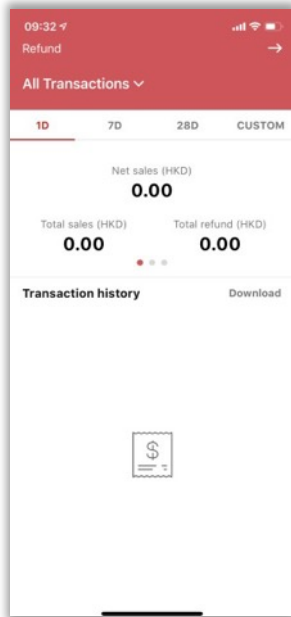
4
Select time



5
Enter PIN to confirm automatic transfer

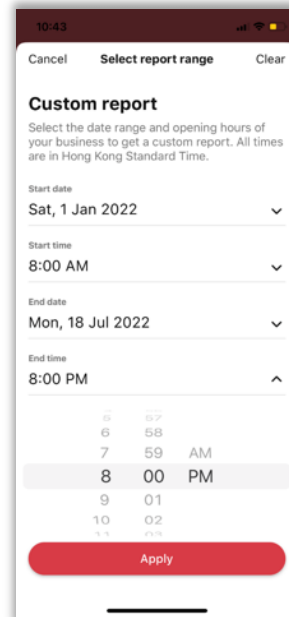


VIII. Reporting and analytics



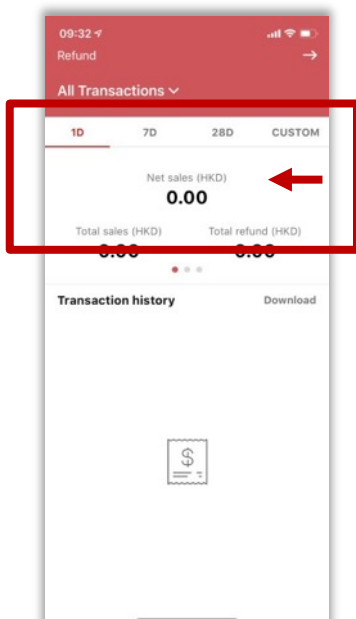
1

With PayMe for Business, your whole business is at your fingertips



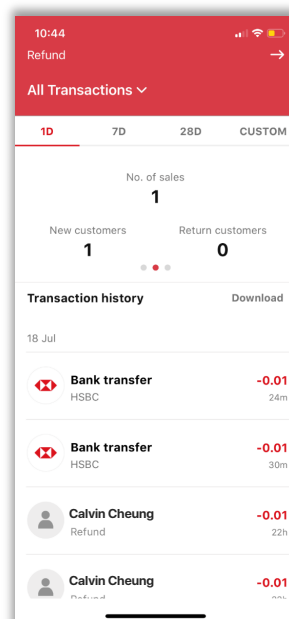
2

Choose to view 1, 7, 28, or up to 365 days of transactions from the custom tab



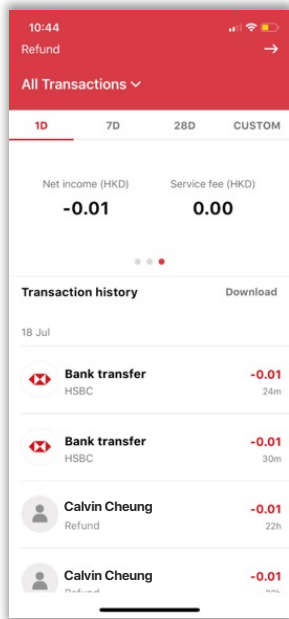
3

For more business insights, swipe left in the area indicated by the red rectangle



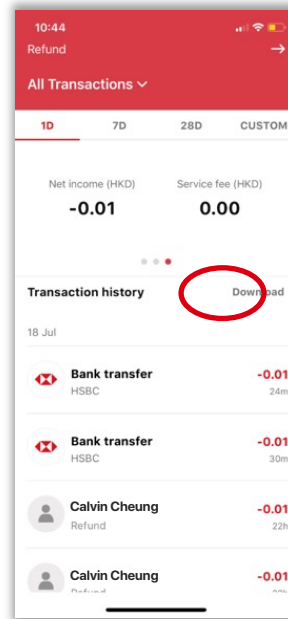
4

You can see more information on no. of sales and customer numbers



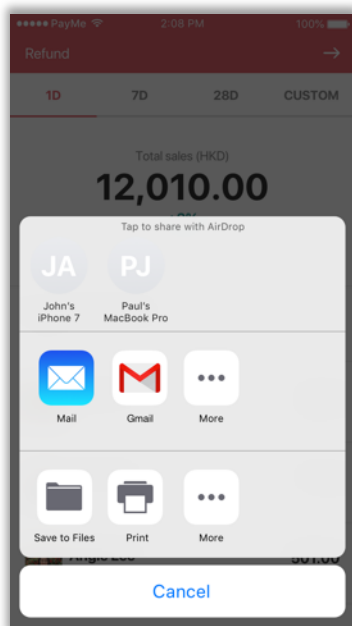
5

Swipe left again to check your net income and service fees in the specified period



6

Finally, tap the export icon to download your transaction history as a CSV file



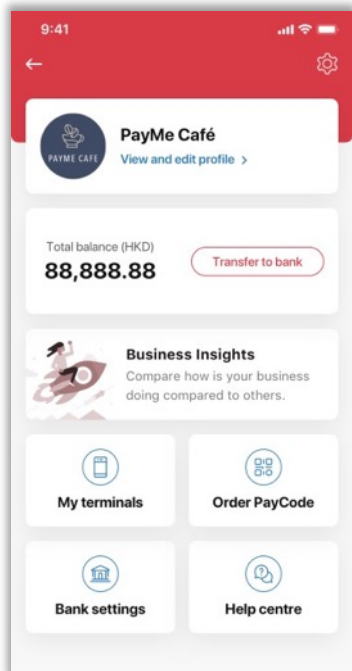
7

Send to your email, save or print

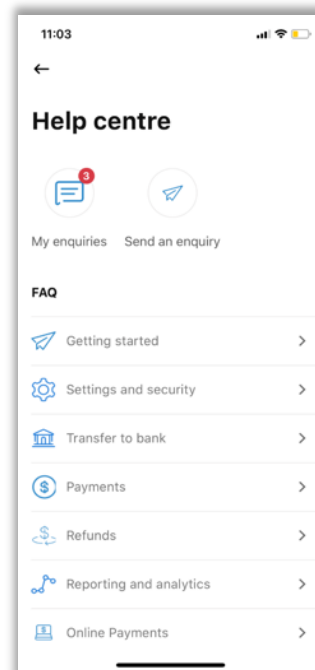
IX. Need help

If you encounter any issues or questions, you can find a list of frequently asked questions by going to the in-app 'Help Center' first.

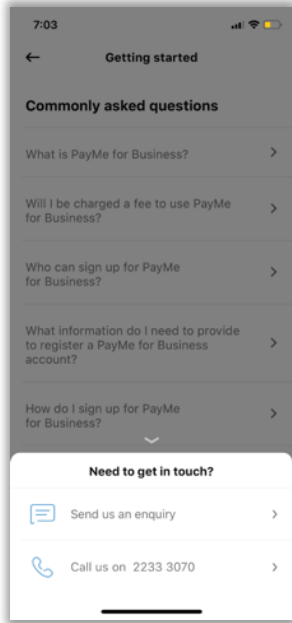
If you cannot find what you are looking for, just tap the 'Need to get in touch' button to send us an enquiry. The PayMe team will get back to you within 1 to 2 working days. For anything really urgent, give us a call on 2233-3070 between 9am and 6pm, Monday to Sunday.



1
Tap 'Help centre'

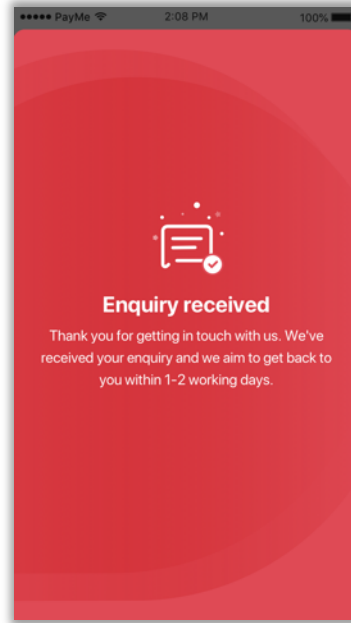


2
Browse a list of FAQs



3

Send us an in-app enquiry or give us a call



4

Submit an in-app enquiry

X. Let your customers know you accept PayMe

Send me a welcome pack!

If you've already registered for PayMe for Business, you will receive a welcome email, where you can submit your delivery address by filling out a form.

A welcome pack will then be on its way to you. It is packed with goodies to inspire and help you let your customers know you now accept PayMe. Each welcome pack includes...



- Window stickers
- Cashier stickers
- PayCode stickers

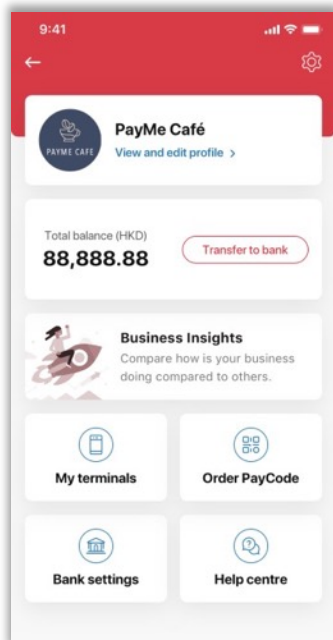
May the 2.8 million PayMe customers come your way!

XI. Terminal Management

This feature allows you to collect payments and/or perform refunds from multiple terminals/devices. Add an additional terminal/device for your employees and manage them from your own device

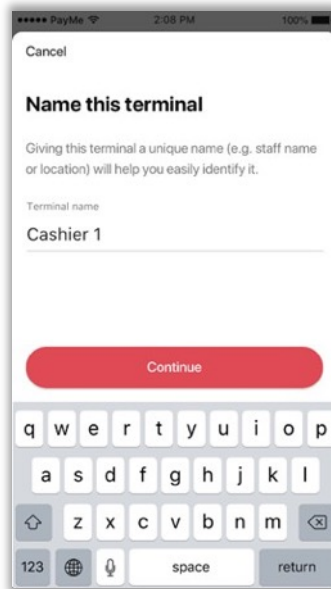
Creating a terminal for the first time

(PayMe for Business account holder/business owner)



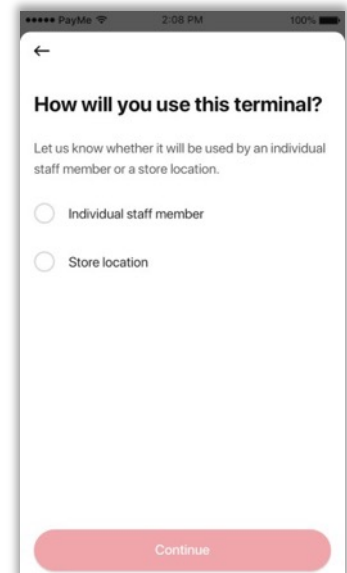
1

Tap on your business profile logo > Manage terminals. You can create up to 50 terminals.



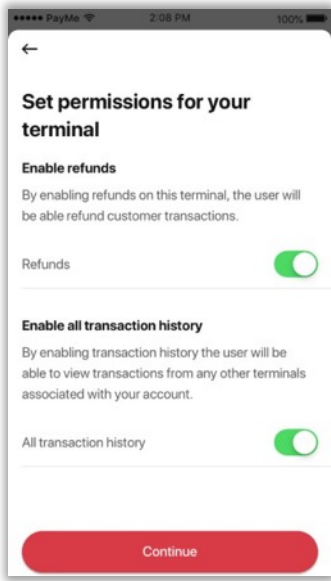
2

Enter a terminal name. This could be a staff member's name, or a store location.



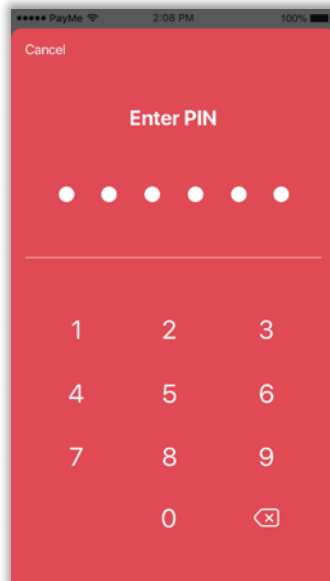
3

Let us know whether the terminal will be used by an individual or a store location.



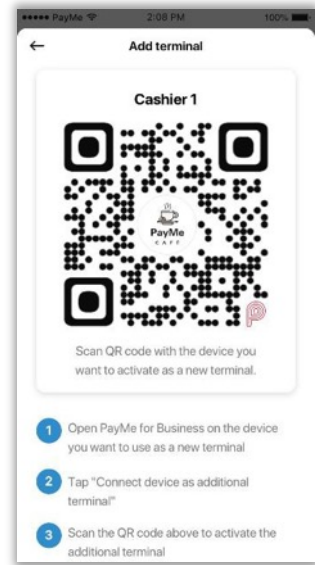
4

Enable refunds for each terminal if you need your staff to be able to perform refunds. You can also enable your staff to view all associated with your account.



5

Enter your PIN to generate a QR code to activate the new terminal



5

QR activation code will be generated. Scan this with the terminal to activate.

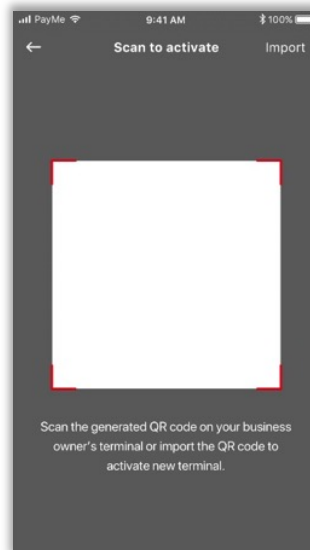
You can also save the QR activation code as an image and share it via SMS or WhatsApp.

Activating the new terminal (Staff/additional terminal user)



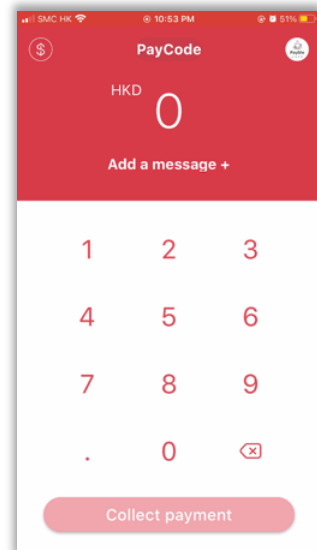
1

Terminal user downloads the PayMe for Business app and taps 'Connect additional terminal'.



2

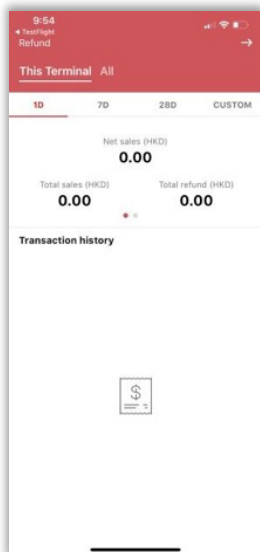
Terminal user scans or imports the activation QR code generated by the business owner.



3

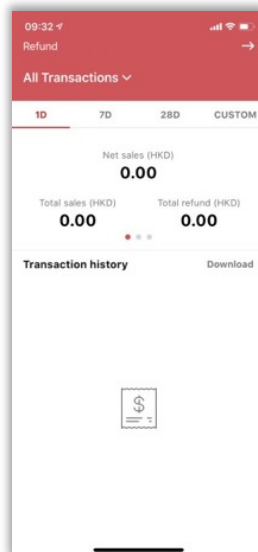
Terminal user is now able to collect payments and perform refunds if enabled.

Terminal management reporting



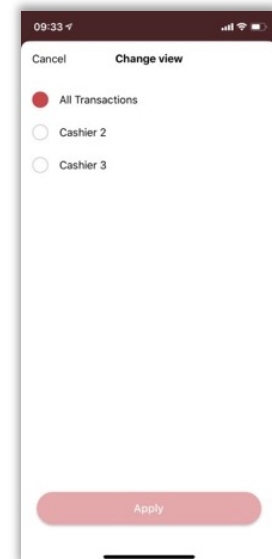
1

To view reports and sales activity, go to 'Transaction history' and select 'This terminal' to see transactions from this device only.



2

To see transactions from all of your terminals in one place, tap 'All transactions' in the main account.



3

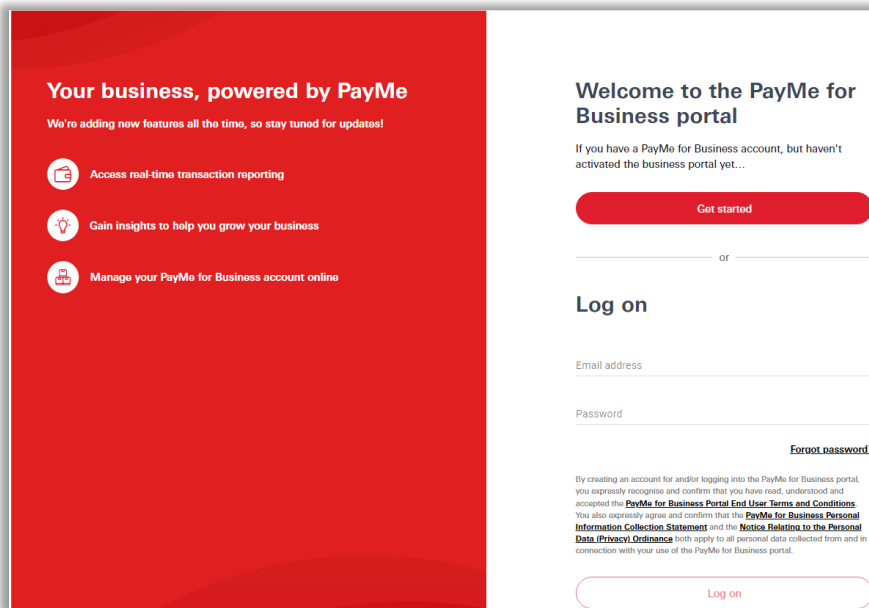
You'll then be given the option to view all transactions, or you can select individual terminals and view their transactions only.

XII. PayMe for Business portal

You can now manage PayMe for Business transactions effortlessly, anytime, anywhere our portal is accessible through a dedicated website, and it's completely free of charge for all PayMe for Business customers.

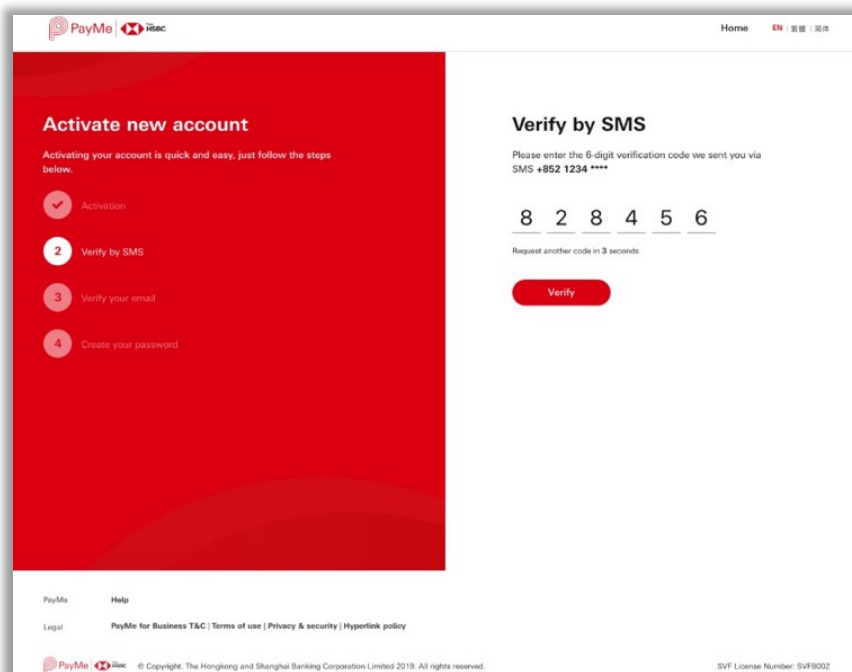
View and manage your transactions instantly via the portal, no matter whether you are using the app, mobile/web checkout or a Point-of Sale (POS) terminal to collect payments.

Get started with the PayMe for Business portal



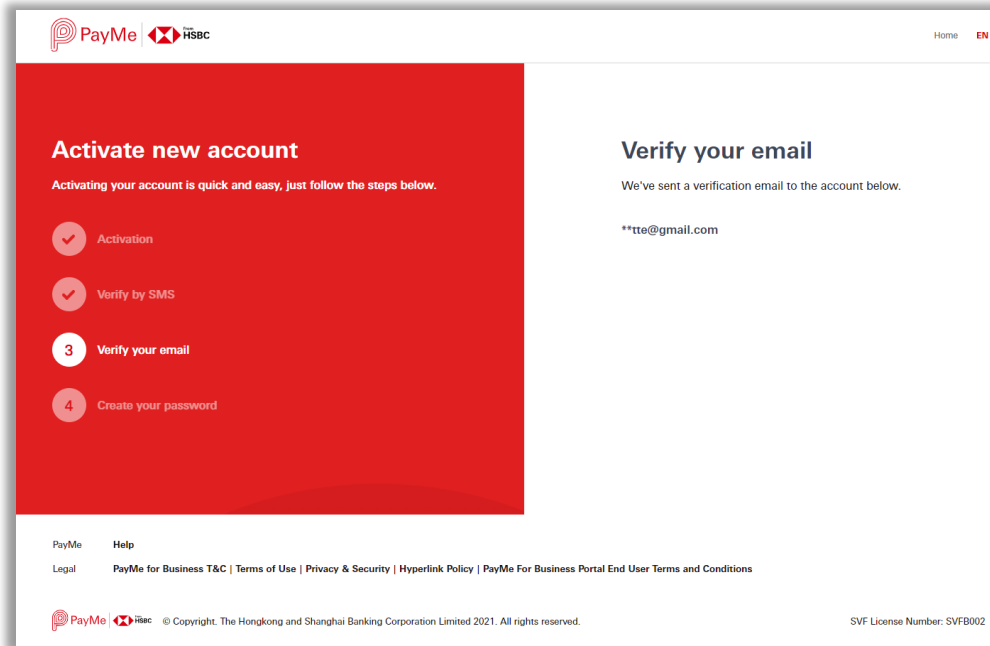
1

Enter your PayMe for Business email address and mobile number, then click
"Activate account"



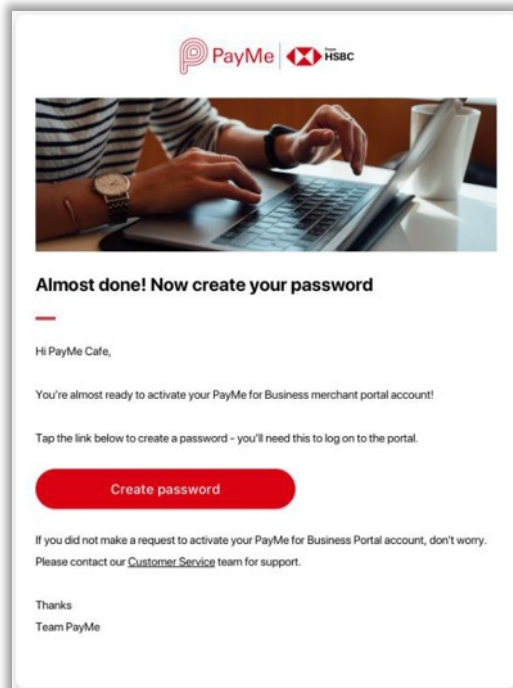
2

Then an SMS will be sent to you with a one-time-password (OTP).



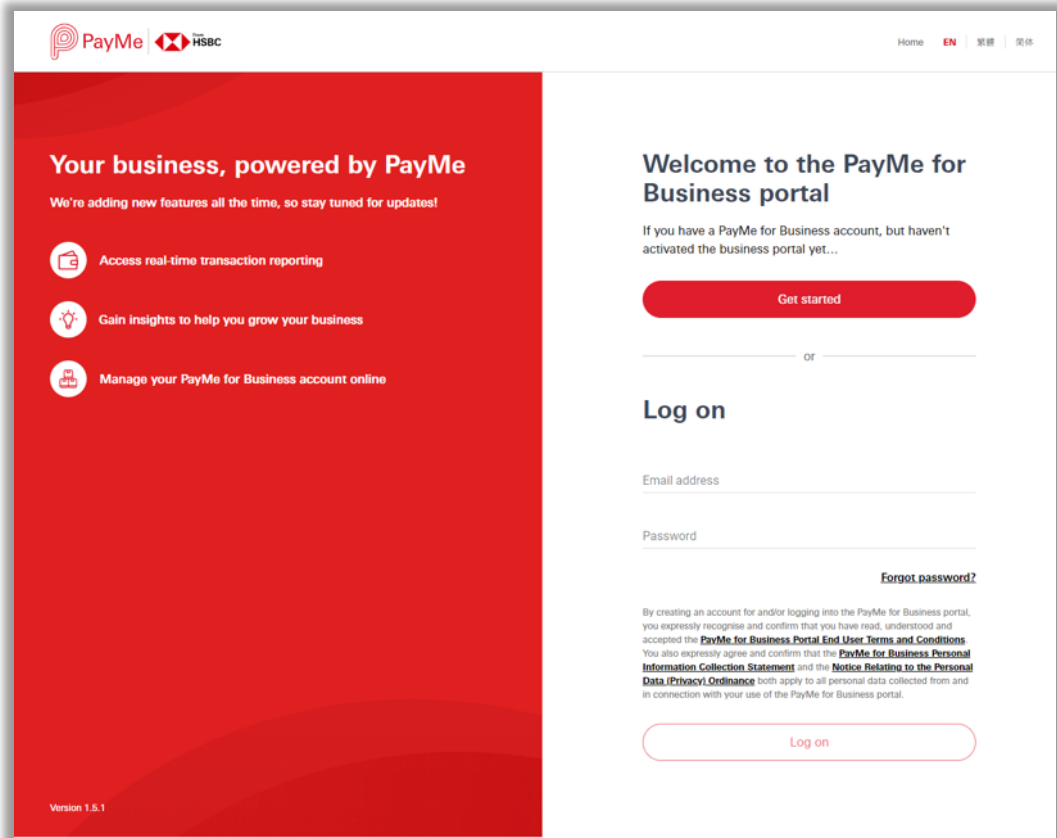
3

A verification email will also be sent to you. Open the link with Chrome, Safari, or Firefox browser to create your portal password



4

Then an SMS will be sent to you with a one-time-password (OTP). Enter the OTP and click "Verify"

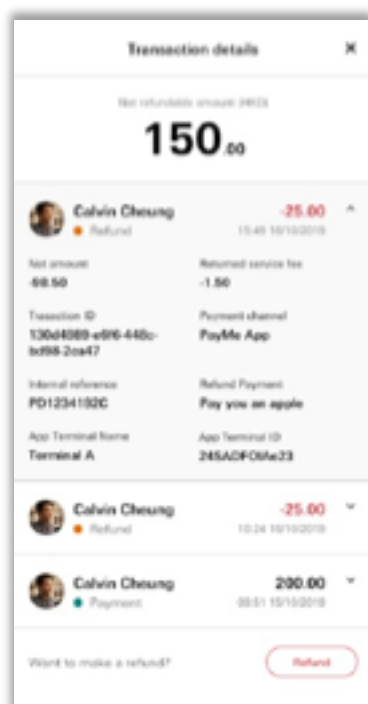
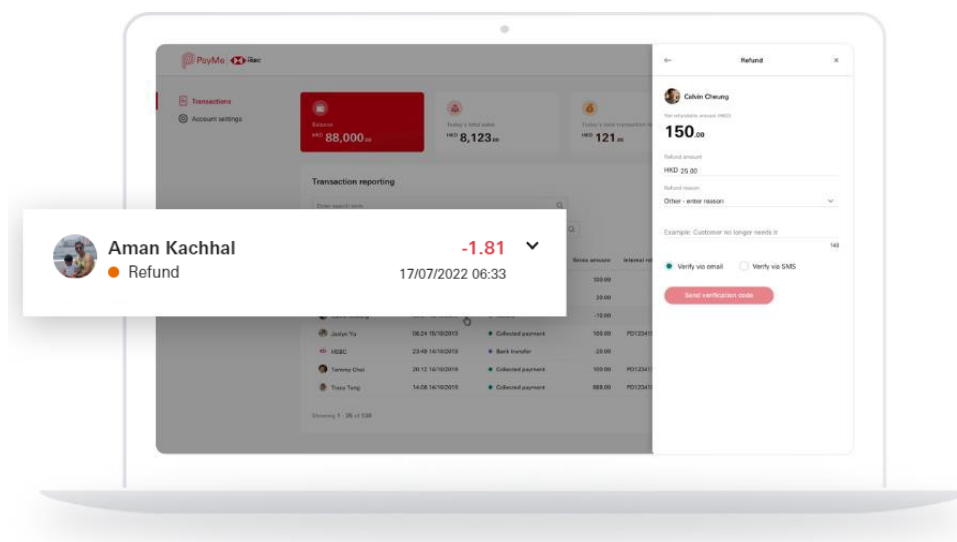


5

Log on with your email address and portal password

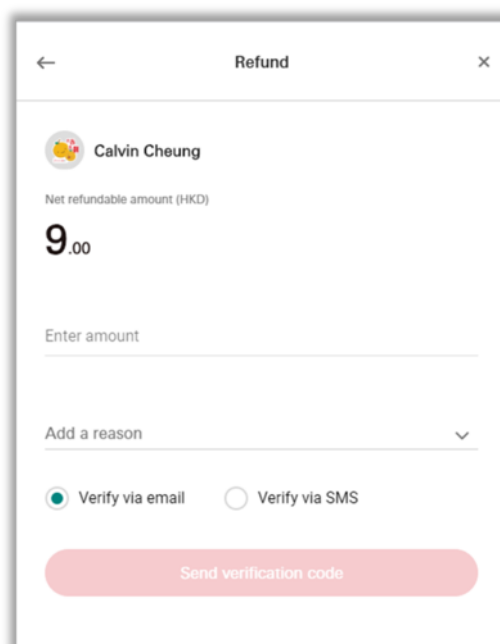
PayMe for Business portal – Refunds

Perform refunds for payments collected through PayMe for Business app, online, or point-of-sale terminal. You can log on to the portal and manage your refunds without any additional integration.



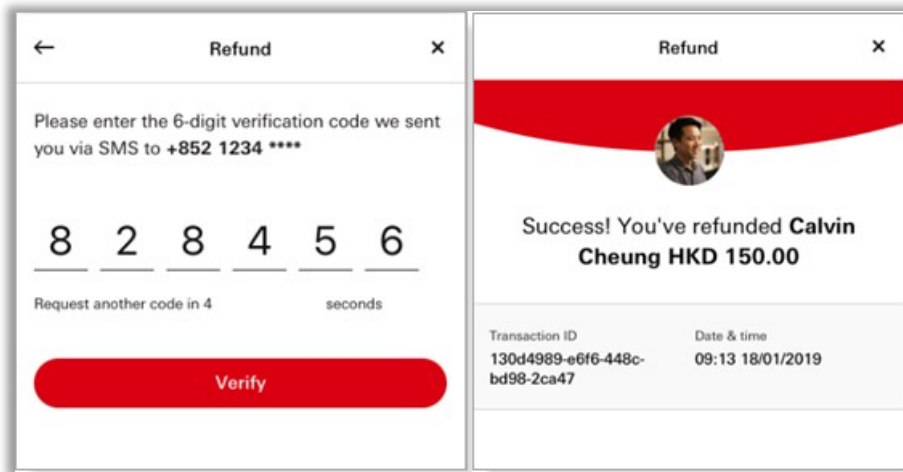
1

Tap on any transaction to view more details, then click "Refund"



2

Enter the amount – you can do a full or partial refund

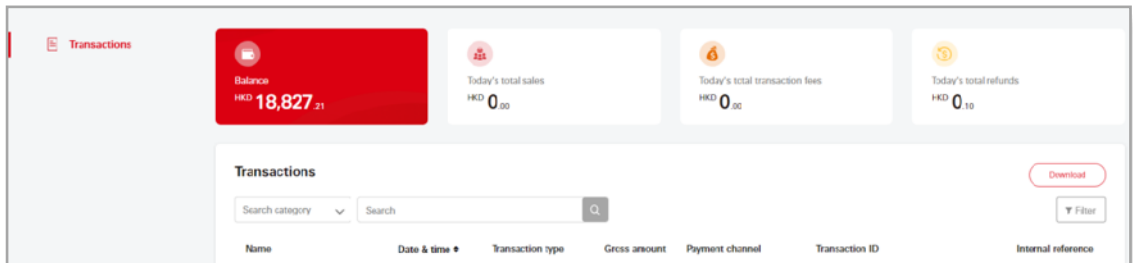


3

Enter the SMS or Email verification code and the refund is complete!

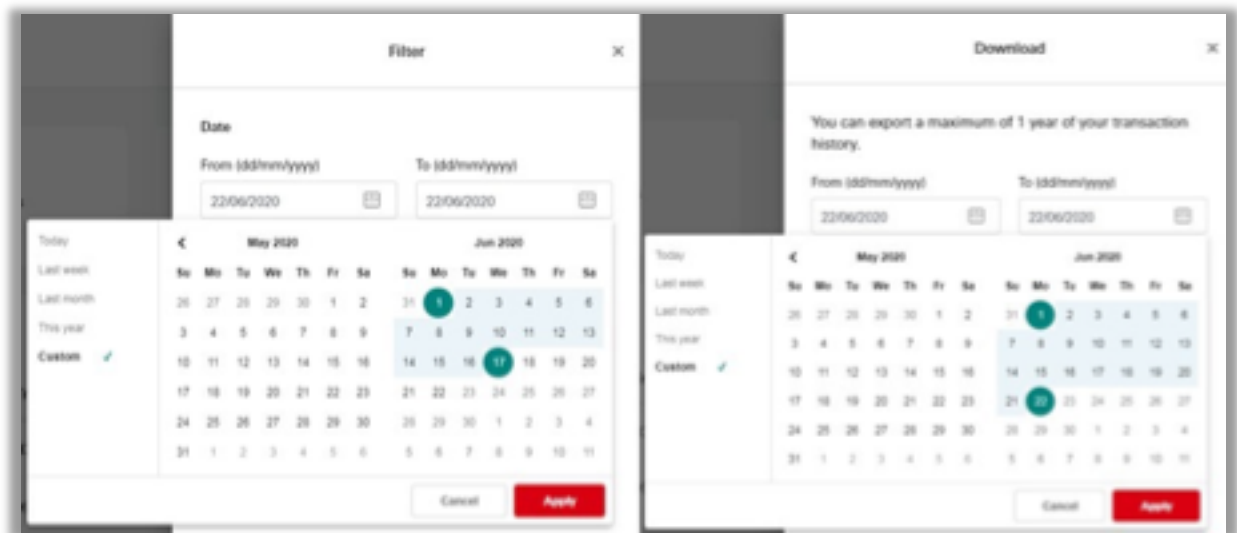
PayMe for Business portal – Reporting

The portal gives you a summary of your transactions and performance at a glance, enabling you to do business better.



1

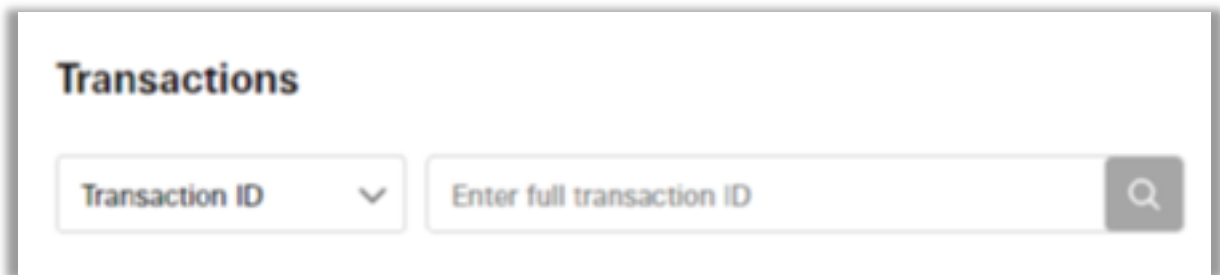
By choosing “Custom”, you can set to check the transactions up till 365 days of timeframe.



2

Tap the “Custom” tab to view 1,7,28, or up to 365 days of transactions

PayMe for Business portal – Transaction Search



Transactions

Transaction ID



Transactions

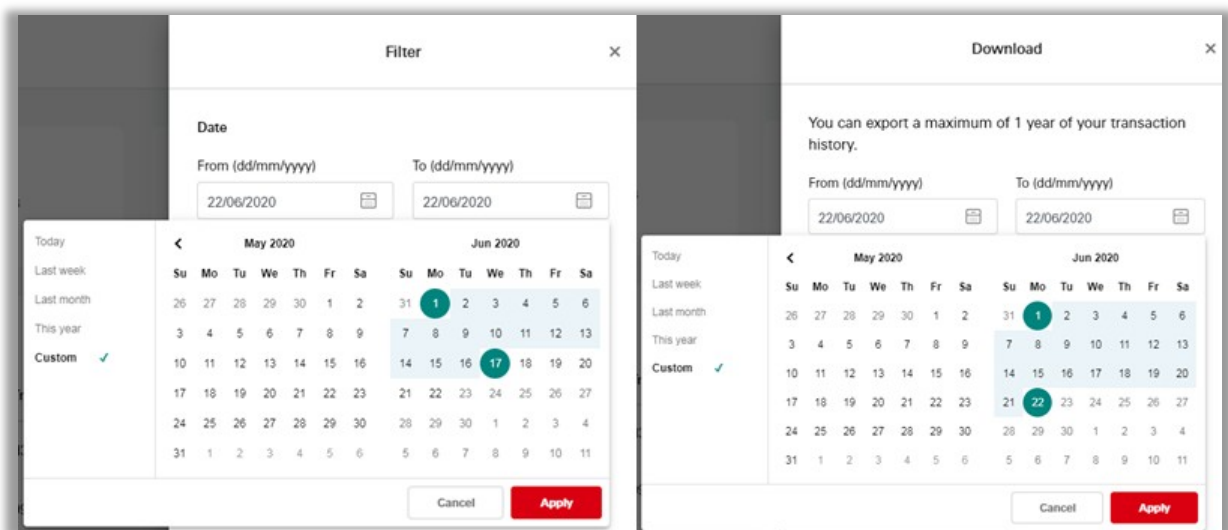
Internal reference

1

Select "Transaction ID" and enter a full transaction ID to search to existing transactions.

OR

Select "Internal reference" and enter an internal reference to search for existing transactions



Filter

Date

From (dd/mm/yyyy) 22/06/2020 To (dd/mm/yyyy) 22/06/2020

Today
Last week
Last month
This year
Custom ✓

May 2020							Jun 2020						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2	31	1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28	29	30	1	2	3	4
31	1	2	3	4	5	6	5	6	7	8	9	10	11

Cancel Apply

Download

You can export a maximum of 1 year of your transaction history.

From (dd/mm/yyyy) 22/06/2020 To (dd/mm/yyyy) 22/06/2020

Today
Last week
Last month
This year
Custom ✓

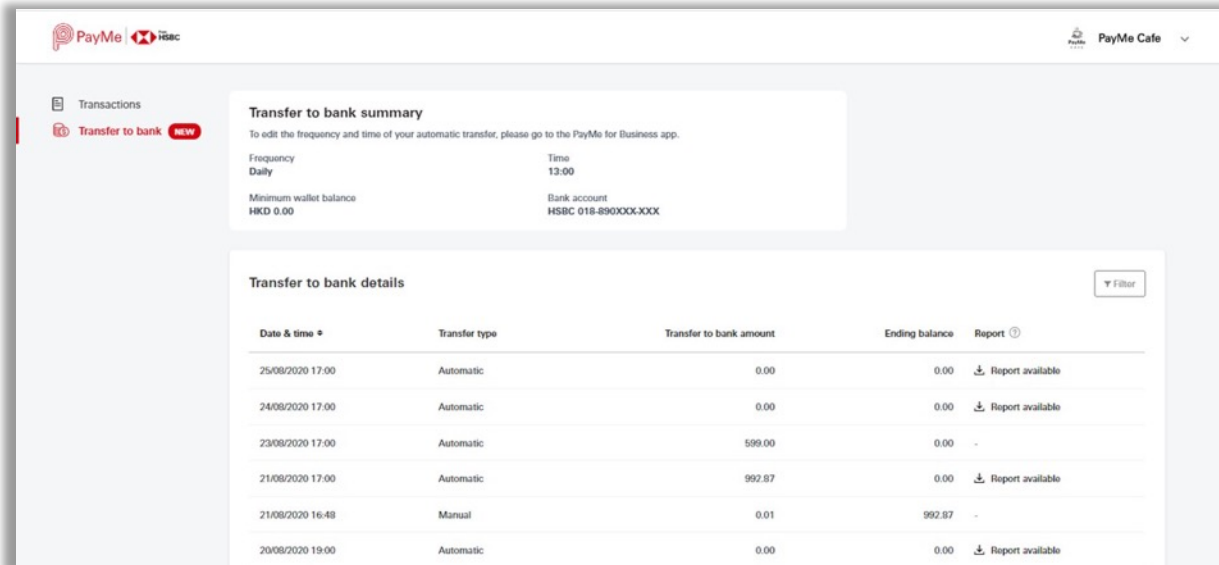
May 2020							Jun 2020						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2	31	1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28	29	30	1	2	3	4
31	1	2	3	4	5	6	5	6	7	8	9	10	11

Cancel Apply

2

Tap the "Custom" tab to view 1,7,28, or up to 365 days of transactions

PayMe for Business portal – “Transfer to Bank” report



The screenshot displays the PayMe for Business portal interface. At the top left, the PayMe and HSBC logos are visible. The main content area is titled 'Transfer to bank summary' and includes a note: 'To edit the frequency and time of your automatic transfer, please go to the PayMe for Business app.' Below this, a summary table shows: Frequency: Daily, Time: 13:00, Minimum wallet balance: HKD 0.00, and Bank account: HSBC 018-890XXX-XXXX. A 'Filter' button is located to the right of the summary. Below the summary is a table titled 'Transfer to bank details' with columns: Date & time, Transfer type, Transfer to bank amount, Ending balance, and Report. The table contains seven rows of transaction data.

Date & time	Transfer type	Transfer to bank amount	Ending balance	Report
25/08/2020 17:00	Automatic	0.00	0.00	Report available
24/08/2020 17:00	Automatic	0.00	0.00	Report available
23/08/2020 17:00	Automatic	599.00	0.00	-
21/08/2020 17:00	Automatic	992.87	0.00	Report available
21/08/2020 16:48	Manual	0.01	992.87	-
20/08/2020 19:00	Automatic	0.00	0.00	Report available

You can download a “transfer to bank” report listing all transactions that fall between your scheduled automatic transfer of funds to your bank account.

How does this help me with reconciliation?

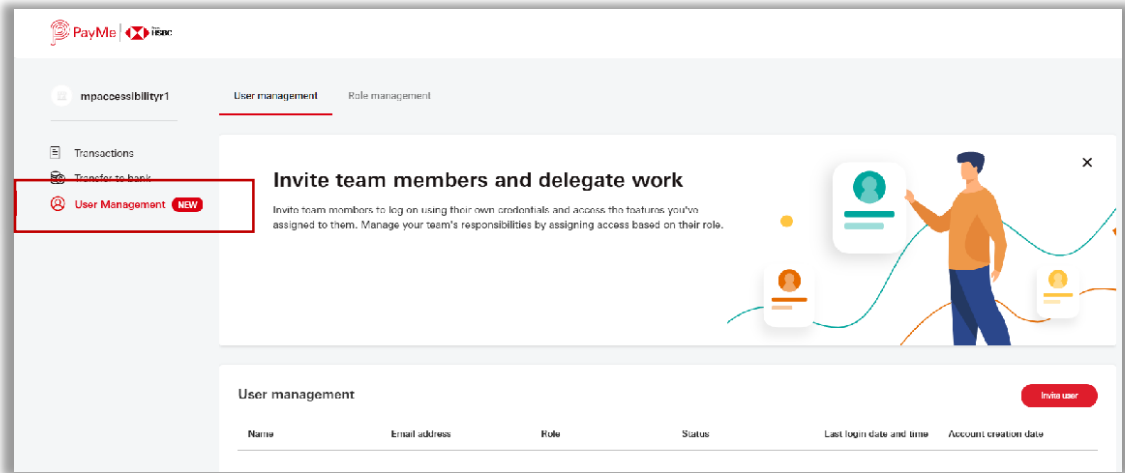
The existing transaction report available in the app or the portal provides you with a list of all your transactions based on the date range you’ve specified.

If you’ve had difficulty mapping funds collected or refunded to a particular automatic transfer to bank instruction, the new report enables you to reconcile those transactions much more easily.

The new report shows only transactions covered between each automatic bank transfer instruction, removing the need to reconcile them individually.

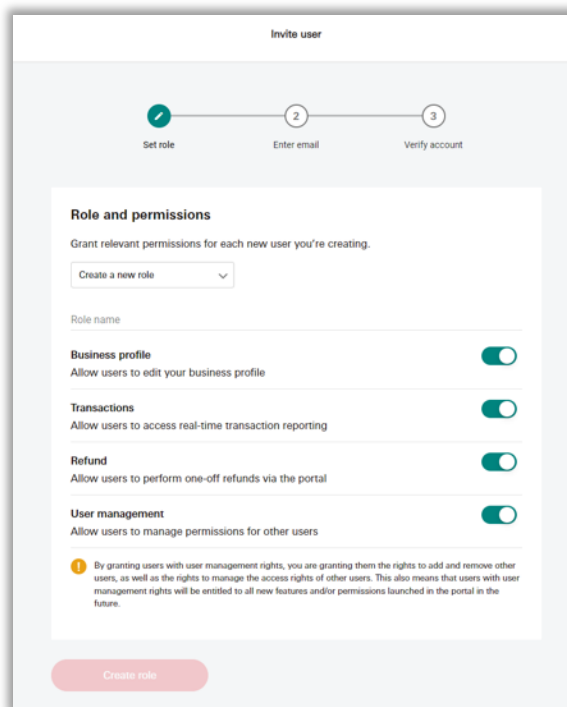
User management

1. Inviting sub-users



1

Click "Invite user" on "User Management" page and on "User management" tab



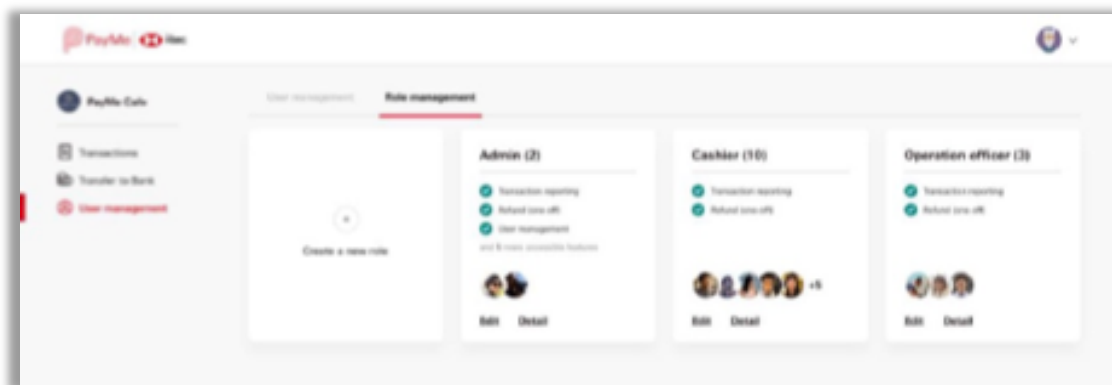
2

Create a role

3

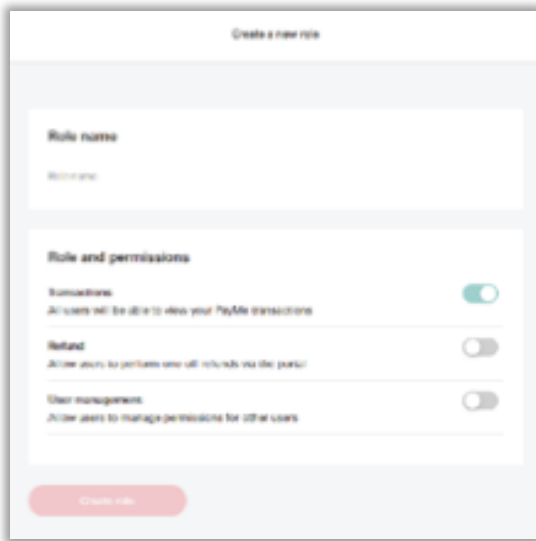
Click “Invite user” on “User Management’ page and complete one-time password (OTP) authentication

2. Role management



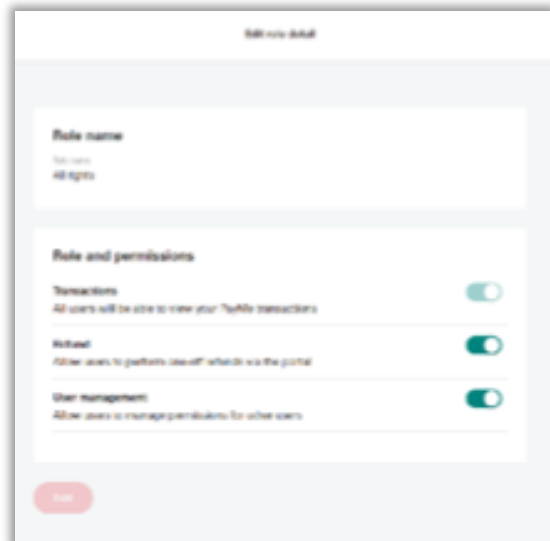
On ‘User managment’ page, select ‘Role management’ tab

Create new role



Click 'Create a new role'

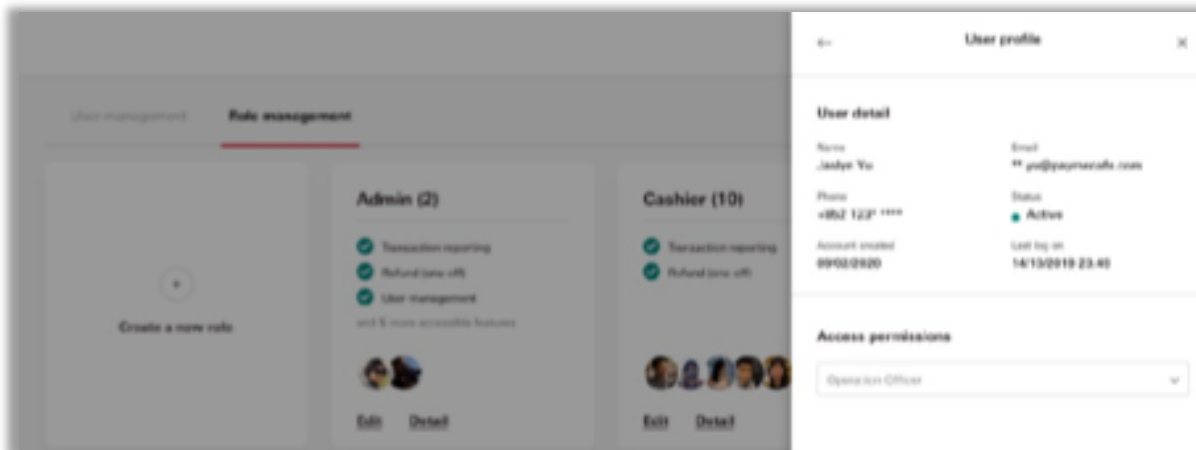
Edit role



Click 'Edit a new role'

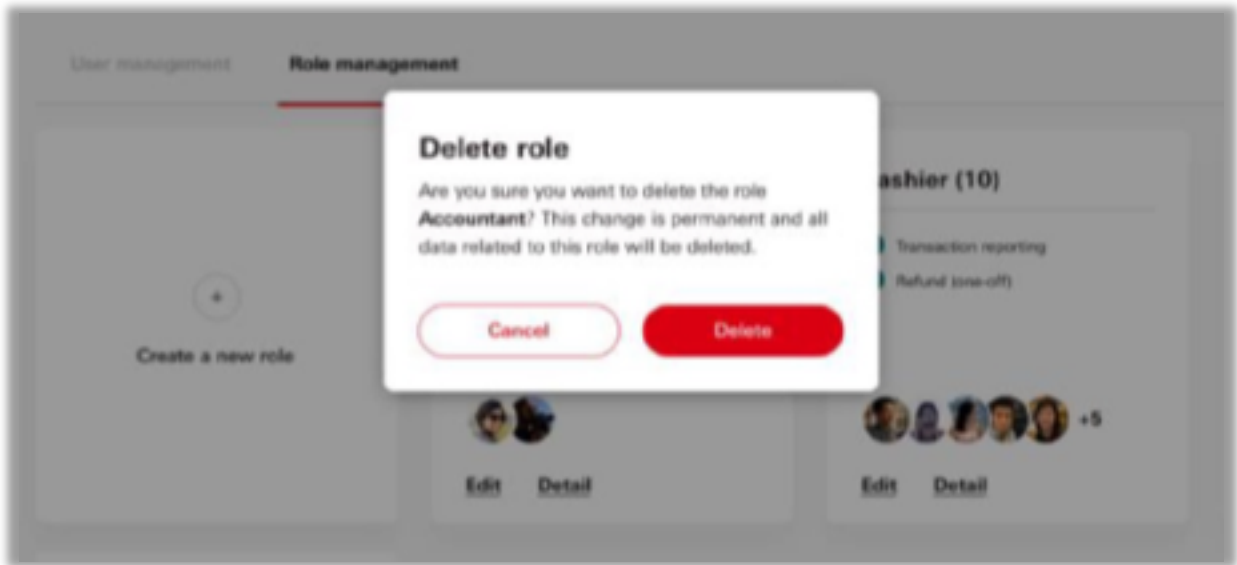
3. Sub-user profile

View sub user details



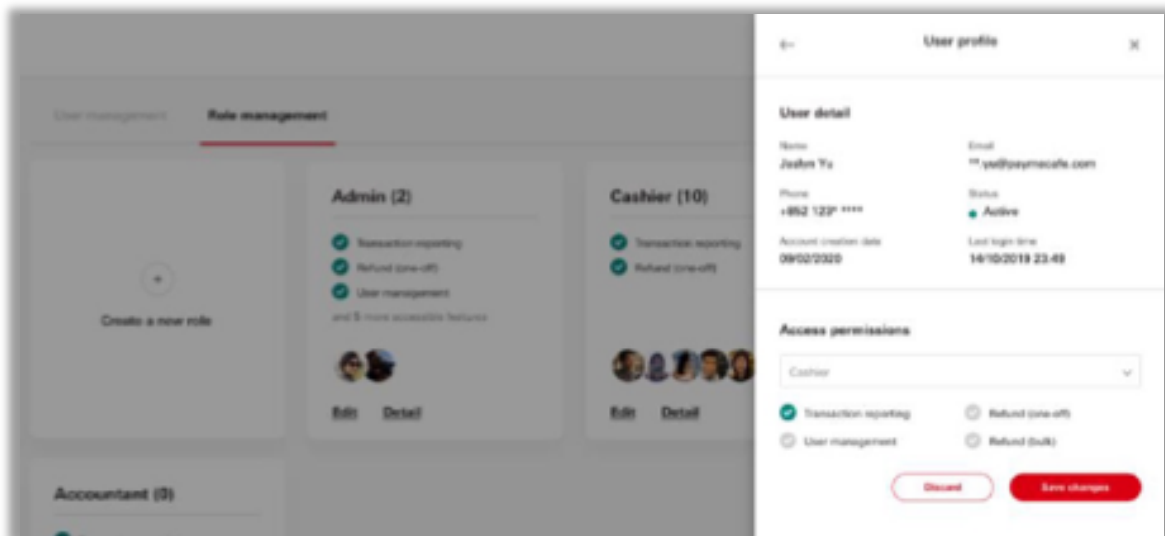
On 'Role management' tab > click 'Detail' on a role, select a user.

Delete role



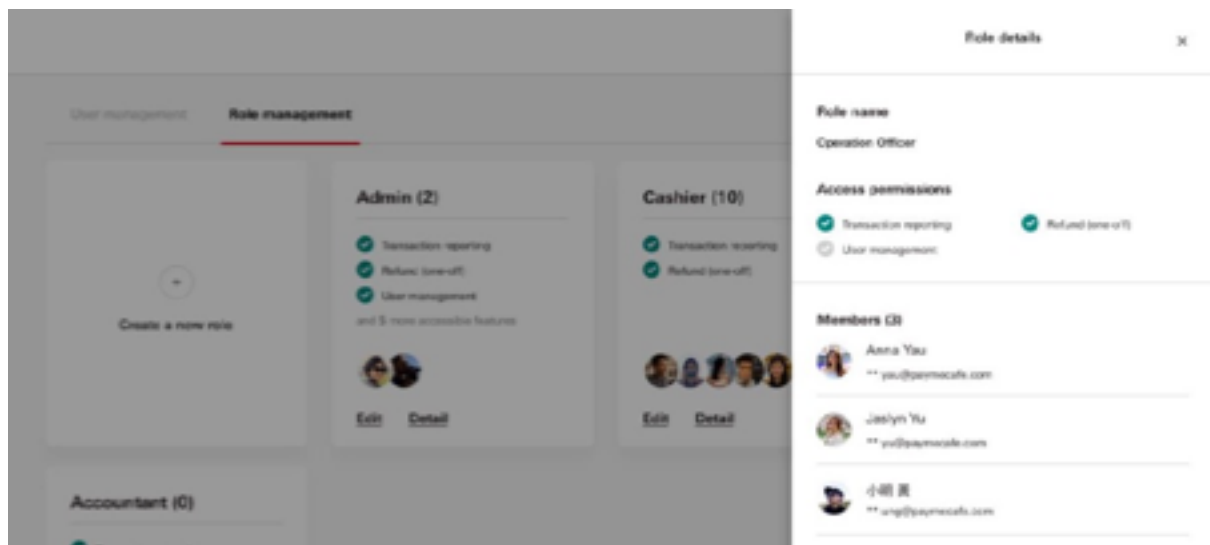
On 'Role management' tab > click 'Detail' on a role, select a user.

Managing sub-user's permissions



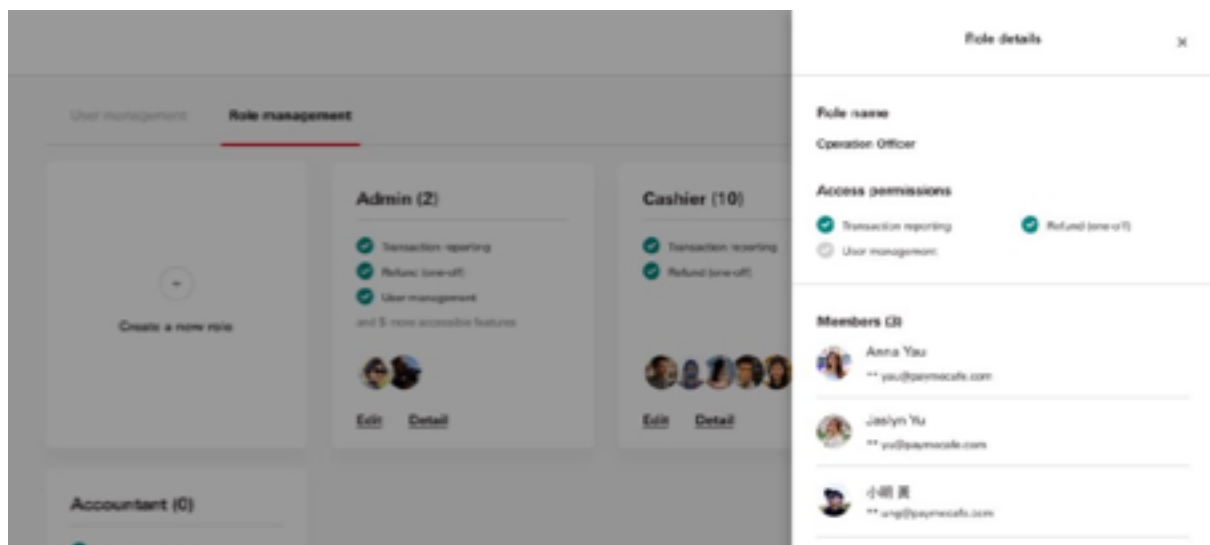
On 'User management' tab > Select the sub-user > Select another role > Press 'continue' > SMS or Email OTP authentication > Confirm

View role details



On 'User management' tab, click on 'Detail' on a role

Deleting a sub-user



On 'User management' tab > select the sub-user > Delete

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