New Operator Introduction

March 31st, 2023

Setup Guide for Operators
## New to the PayRange Platform

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Creating a PayRange Operator Account

The first step for new PayRange operators is to create an Operator Account.

Create New Operator Account
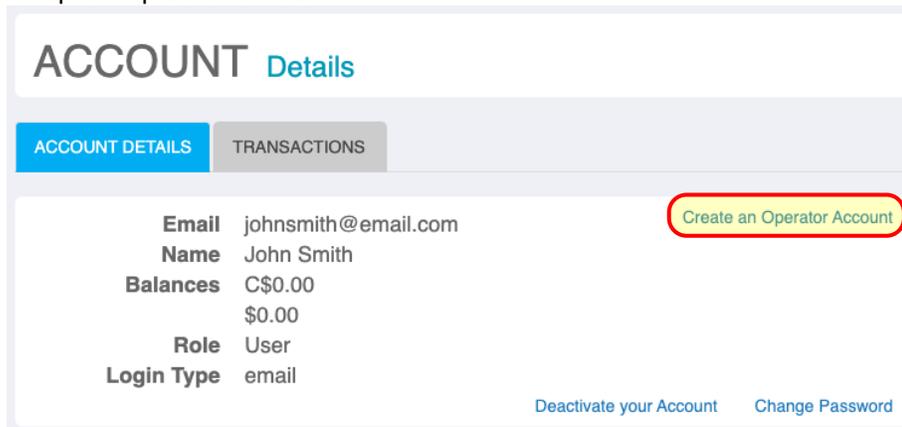
To create an Operator Account:

1. On a desktop/laptop computer open a browser and go to manage.payrange.com
2. Select "Operator Sign up" below the login window
3. Enter name and email address, then create a password (minimum of six characters) and press 'Next'
4. Enter your mobile phone number and you will receive an SMS with a verification code. Enter the verification code and press 'Next'
5. Fill out all pertinent information as it applies to the business
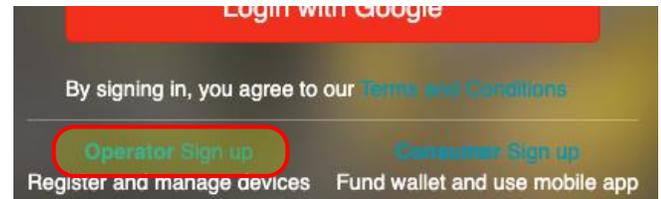
Convert Consumer Account to Operator Account

If you have already downloaded the PayRange app and created a consumer account, you can convert that consumer account into an operator account:

1. On a desktop/laptop computer open a browser and go to manage.payrange.com
2. Enter the credentials for the consumer account and sign in
3. On the right side of the screen, select "Create an Operator Account" and follow the steps to setup the operator account

Add Users to the Operator Account

After the operator account is created, it's possible to add other people as users and assign them different levels of access to the account. Anyone installing or testing devices should be added as a user. If no other users need to be added to the account, skip this section.

Before anyone can be added as a user, they must first have a PayRange consumer account associated with an email address. A consumer account can be created in two ways:

1. Download/open the PayRange mobile app then select "New User" in the lower right corner. Next, select "Sign Up with Email" and follow the prompts.

2. On a desktop/laptop computer open a browser and go to manage.payrange.com, then select "Consumer Sign up" below the login window

To add a user to the Operator Account:
1. Login to the Manage Console at manage.payrange.com
2. On the navigation bar on the left, select 'Settings' then select 'Users'
3. Click the green 'Add Users' button
4. Enter the email address of the user
5. Select a role for the user from the dropdown menu
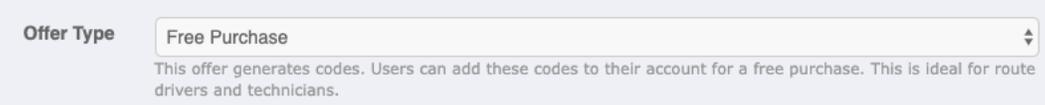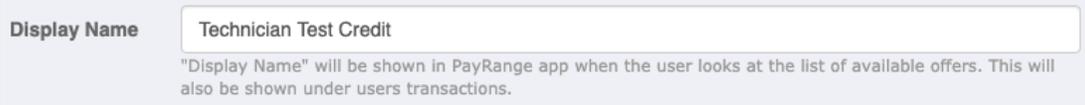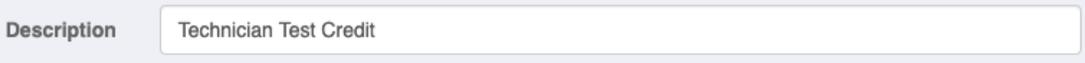   *Privileges for each role outlined in Appendix I*
6. Click 'Add User'
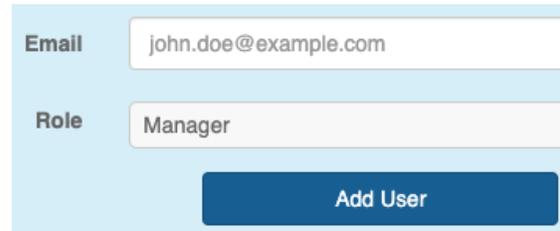
Email	john.doe@example.com
Role	Manager
	Add User

Create 'Free Purchase' Offer for Device Testing

Anyone set as an 'Owner' on the operator account may create offer codes as often as needed, which can be distributed to any PayRange user. It is critical to perform a PayRange transaction on all machines after install. Creating a 'Free Purchase' offer code allows the devices to be tested without the need to load funds into the PayRange wallet.

Offer codes can only be created using Manage Console:

1.	On the navigation bar on the left, select 'Offers' then 'Create Offer'
2.	Select "Free Purchase" from the dropdown list of offer types **Offer Type** — Free Purchase This offer generates codes. Users can add these codes to their account for a free purchase. This is ideal for route drivers and technicians.
3.	Enter Display Name such as "Technician Test Credit" – the display name will be visible to any PayRange user who redeems the code (this field is required) **Display Name** — Technician Test Credit "Display Name" will be shown in PayRange app when the user looks at the list of available offers. This will also be shown under users transactions.
4.	Enter Description – this can be the same as the Display Name, or a general description of what the code is for (this field is required) **Description** — Technician Test Credit
5.	Enter 'Offer Note' if desired (field is not required)

6. Set 'Max Vend Amount' – this should be set at least as high as the most expensive item that will need to be purchased during a single transaction

Max Purchase Amount	5.00

7. If desired, set a start and/or expiration date for when the offer is valid for redemption.
(Default setting: the code must be redeemed within one month from when it is created)

8. An image may be added to the offer
(This step is not necessary for device testing, or for the creation of offer codes for any purpose, but adds a nice touch for codes provided to customers)

9. 'Basic Configurations':
    a. "**How many free purchase codes do you want to generate (max 100)?**" – this is the number of codes that will be created. If one person is testing machines, create 1 code, if multiple people are testing create as many codes as needed, up to 100.

How many free purchase codes do you want to generate (max 100)?	1
	If you need more codes, contact us at support@payrange.com
How many free purchases does a user get for one free purchase code?	50
	If you set this number to 3, a user will get 3 free purchases for one code. Each of the 3 purchases will have the same max purchase amount.

    b. "**How many free purchases does a user get for one free purchase code?**" – this is how many transactions the user will be able to make after redeeming the code. Set this value to allow at least two transactions per device being tested.

    For example, if the value is "50" the user will redeem the code once in the app and will be able to perform 50 transactions. Each transaction will work for amounts less than or equal to the 'Max Vend Amount' set in step 6.

10. Enter Tags to restrict the codes to certain machines. BluKey devices must have a matching tag which can be added to devices via Manage Console after being registered. To allow the Free Purchase code to work on all machines, do not add any tags.
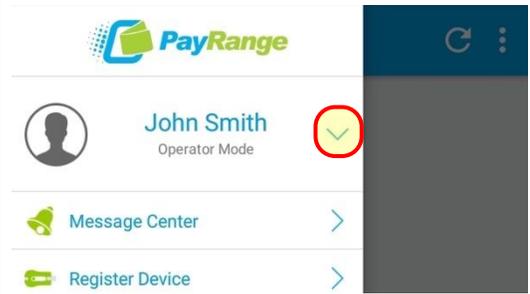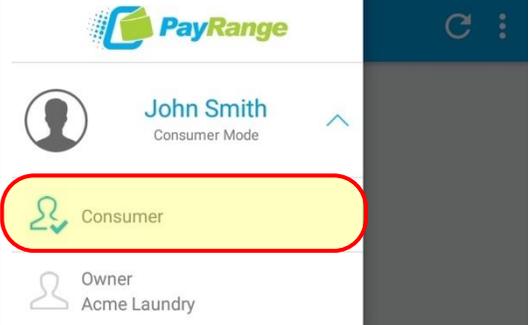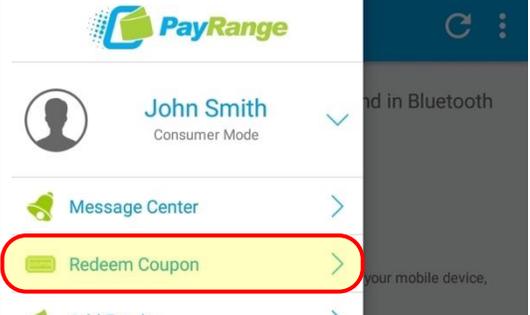
11. Click "Create Offer" button and 8-digit code(s) will be displayed. Write the code(s) down or copy and paste into a notepad.
To view the code(s) again at any time in the future, on the navigation bar on the left, select 'Offers' then 'List' to view active and expired offers. Select the desired offer and scroll to the bottom of the page to see the associated offer code(s).

Redeem Free Purchase Offer in PayRange App

Offer codes can be redeemed in the PayRange app. If the app is not yet installed on your mobile device visit the App Store (iOS) or Google Play Store (Android), search "PayRange" and install the app. After installation, open the app and sign in using the credentials for your operator account.

To redeem an offer in the app:

1. Open the app menu by tapping on the three lines in the upper left corner	
2. Switch to the consumer mode of the app by tapping the dropdown to the right of the name	
3. Select 'Consumer Mode'	
4. Reopen the app menu by tapping on the three lines in the upper left corner	
5. Select "Redeem Coupon"	
6. Enter the 8-digit offer code and press "Submit"	

Register BluKey Devices

Each BluKey devices serial number (or Device ID) must be registered to the operator account. This process assigns all revenue and reporting from each device to the specific operator. It is recommended to register each device through the PayRange mobile app at the time of install. However, registration can also be done ahead of time through Manage Console.

Device Registration via App (recommended)

1. Open the PayRange app and verify it is set to operator mode (open app menu; under the name shown at the top of the menu, it should show "Operator Mode" or the name of the Operator Account. If "Consumer Mode" is displayed, tap the dropdown arrow to the right and switch to operator mode).

2. In the app menu, select "Register Device" to open registration form

3. Scan the barcode on the back of the BluKey, or manually enter the device serial number and PIN

4. Go through each step on the registration form and fill in all necessary information as it pertains to the device/machine. For vending and amusement installations, take a clear picture of the machine which will be displayed in the app. For laundry and car wash installations, do not take a photo; app will display a number image based on the Position ID.

5. Press "Register" button on the final step to complete device registration. Repeat process for each device being installed. To change device information after registration, open the app menu and select "Edit Device"
   Note: For instructions about how to view device ID without opening machine, see Appendix II

Device Registration via Manage Console

1. On the navigation bar on the left, select 'Devices' then select 'Register'

2. Fill out all necessary fields beginning with **Device Details**. Serial number and PIN can be found on the back of each BluKey device under the barcode.

   a. **Device Image:** For vending and amusement installations, upload a clear picture of the machine which will be displayed in the app. For laundry and car wash installations, do not take a photo; app will display a number image based on the Machine Position.
   b. **Tags:** this field is optional. Tags can be used to sort and summarize devices by machine type, route, or location. Tags can also be used to restrict offer codes to certain machine and restrict users with 'Route Driver' role to only have access to specific machines.

3. Press "Register" button to complete device registration. Repeat process for each device being installed. To change device information after registration, on the navigation bar on the left, select 'Devices' then select 'List'. Select the device from the list then select "Edit Device".

Install Devices and Affix Machine Decals

Install Manuals
Select the appropriate install manual for your application.

Decals

Your PayRange order may include multiple decals:

- **Vertical Decal** – this decal describes how to use the PayRange app in three simple steps, and can be affixed to each machine

- **First Purchase Free Decal** – this decal should be used only if the 'New User Program' is enabled on the operator account.
  - The New User Program allows customers who are brand new to PayRange to use the app for a single transaction for their first ever PayRange transaction and is a great way to incentivize customers to adopt mobile pay
  - To enable/disable this feature, and to set the maximum amount the transaction is good for: login to Manage Console → select "Rewards" → select "New User Program"

- **Number Decal** (Laundry and Car Wash applications only) – a unique number decal must be affixed to each machine that will be equipped with PayRange. Each BluKey device must be assigned a unique Position ID pertaining to the number decal on the machine.

Testing Devices Using App

It is critical to test each BluKey device after install to verify that everything has been installed and setup properly, and that all devices are working properly. Before testing, it is recommended to create and redeem a Free Purchase offer (view Create Free Purchase Offer section).

If real funds have ever been added to the account, the free purchase offer will need to be selected before making purchase (view Appendix III: How to Select Offer). If unable to create/redeem code, add funds into PayRange wallet.

Note: In machines that also accept cash, it is highly recommended to test cash acceptance as well.

Contacting PayRange Support

Technical Support:	Sales and Marketing Support:
Phone: +1 (855) 856-6398 (menu option 3)	**Phone:** +1 (855) 856-6398 (menu option 2)
Email: ask@payrange.com	**Email:** sales@payrange.com
The link to our video library below helps our growing PayRange community with common support scenarios. For example, account setup, installation, and setting up promotions. https://vimeo.com/payrange	

Appendix I: Account User Roles

Owner:	• This role allows full access to the account and should be considered the administrative role. This user will have access to financial and account details. • This is the **role that allows the user to add/remove other users** and can modify user roles in the account. • Update or add bank account information. • Can control Marketing campaign programs and set program price limits for each of them.
Manager:	This role allows the user to manage the devices registered to the account. • SALES: Dashboard, Summary, Reports, Transactions, Collections • DEVICES: Health, List, Map, Register, Management, Profiles • OFFER: List, Create offer • Marketing: View access to Marketing campaigns. • No access to payment pages.
Route Driver:	This role allows a route driver/tech access to the devices on their route. The only information they view is: • SALES, Transactions • DEVICES: Health, List, Map, Register, Management, Profiles • When route driver is added with tags, they can only access the devices under the same tag. Their device list (when creating role, owner 'tags' devices to correspond to this user.)
Finance:	This role will have access to the following pages within PayRange web management console: • SALES: Dashboard, Summary, Reports, Transactions, Collections • DEVICES: Health, List, Map, Profiles • PAYMENTS: List
Customer Service:	This role will have access to the following pages within PayRange web management console: • SALES: Dashboard, Summary, Reports, Transactions, Collections • OFFERS: List, Create Offer
Business Operations:	This role will have access to the following pages within PayRange web management console: • SALES: Dashboard, Summary, Report, Transactions, Collections • DEVICES: Health, List, Map, Register, Management, Profiles • PAYMENTS: List

Supervisor	The Supervisor is an employee who manages the devices but does not deal with finances and/or offers.
	• DEVICES: Health, List, Map, Register, Management, Profiles
Distributor	• This role can create and manage multiple PayRange operator accounts.
	• This role is intended for a user outside of your company, for example, if you have a distributor who is setting up devices for your account, then this would be the role to assign. This role can also be used by a distributor to create new operator accounts for their customers.
	• This role may not apply to your company's needs.
	• Allows the user to add/remove/modify to same level role or below to their level.
	• No access to Payments
Attendant (Available in future release)	This role has access to Free Purchase with Daily Limit on the Number of transactions and frequency for each transaction. Transaction and purchase limits can only be set by owner(s)

User Roles Permissions Table by Management Portal Pages

Navigation Pages	Owner	Manager	Route Driver	Finance	Customer Service	Business Operations	Supervisor Role	Distributor
Sales	x	x	'tagged'*	x	x	x		x
Devices	x	x	'tagged'*	x	x***	x	x	x
Payment	x			x**		x**		
Offers	x	x			x			x
Marketing	x	x						x
Settings	x							x

* User only has access to information if the device is tagged.
**No bank account access.
***Limited to view and edit device pricing profiles.

Appendix II: View Device ID from App

The BluKey serial number, or Device ID, can be displayed in the PayRange app, eliminating the need to open the machine to read the number directly off the device.
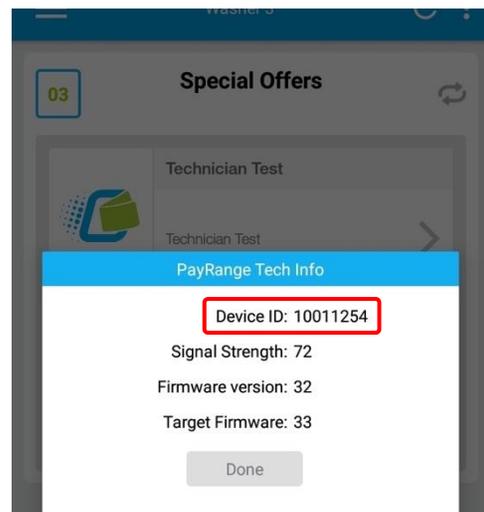
1. Select a machine and tap the "Offers" tab in the upper right corner – the machine card will flip over to reveal available offers
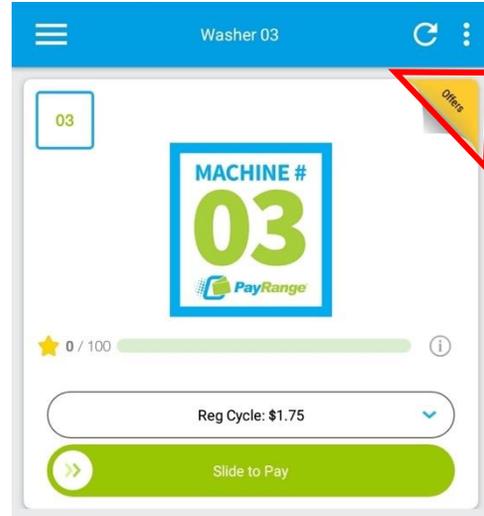
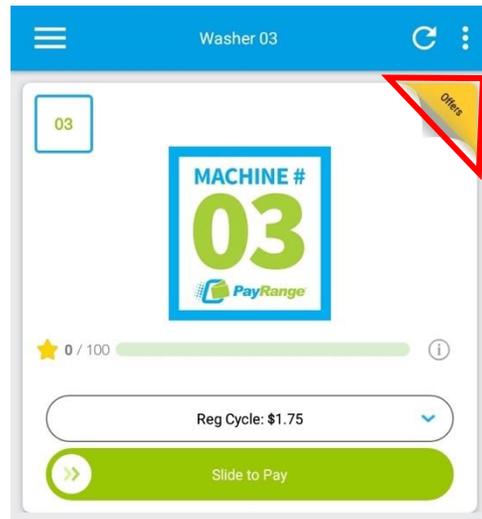2. Double tap on "Special Offers" using <u>two fingers</u>
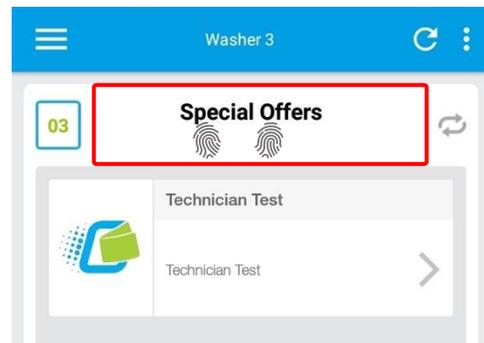
3. "PayRange Tech Info" dialog box will open revealing the Device ID
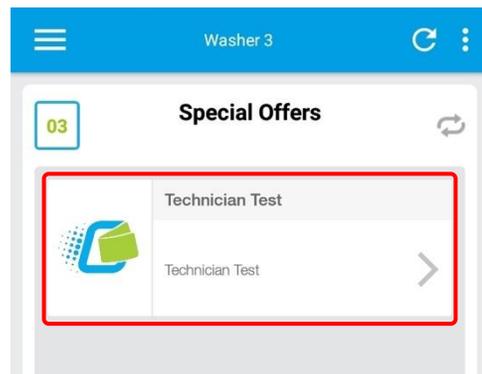
Appendix III: How to Select Offer

1. Select a machine and tap the "Offers" tab in the upper right corner to see all available offers

2. Select the desired offer from the list

3. Tap "Use this offer"

   Repeat process each time before making a transaction to use the offer