USER MANUAL FOR MERCHANT PORTAL

How to login *Merchant Portal*?

1. Go to the link https://ezyshare.online/ezyshare-merchantportal/production/login and key in the user *Email* and *Password*, which serve as merchant user credentials.
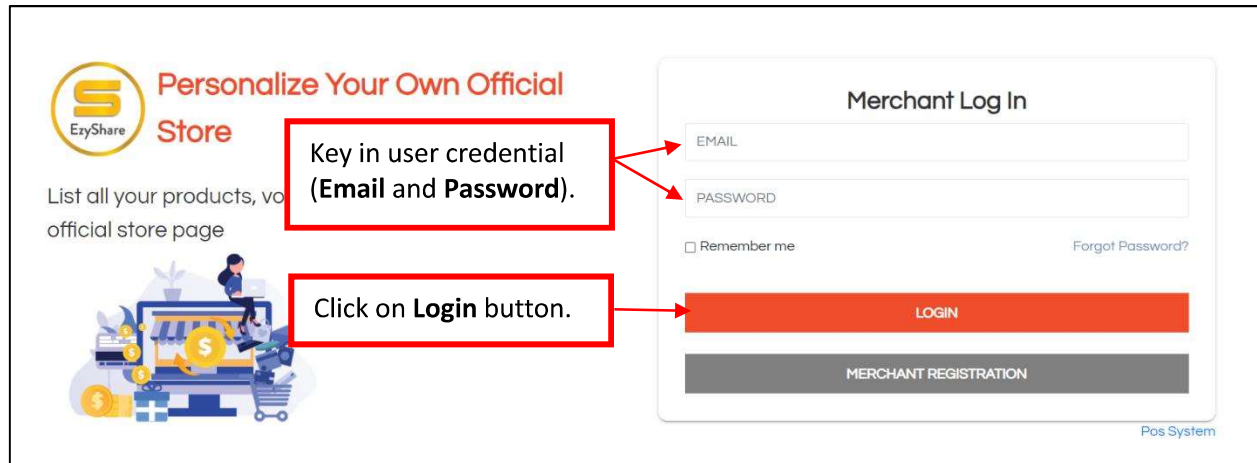

2. This is Merchant Portal Access. Once you click the '**Login'** button, first things first, the user will see this interface. The portal includes a comprehensive dashboard that offers a clear overview of monthly sales performance, customer acquisition analysis, and sales reports, empowering merchants to make informed business decisions.
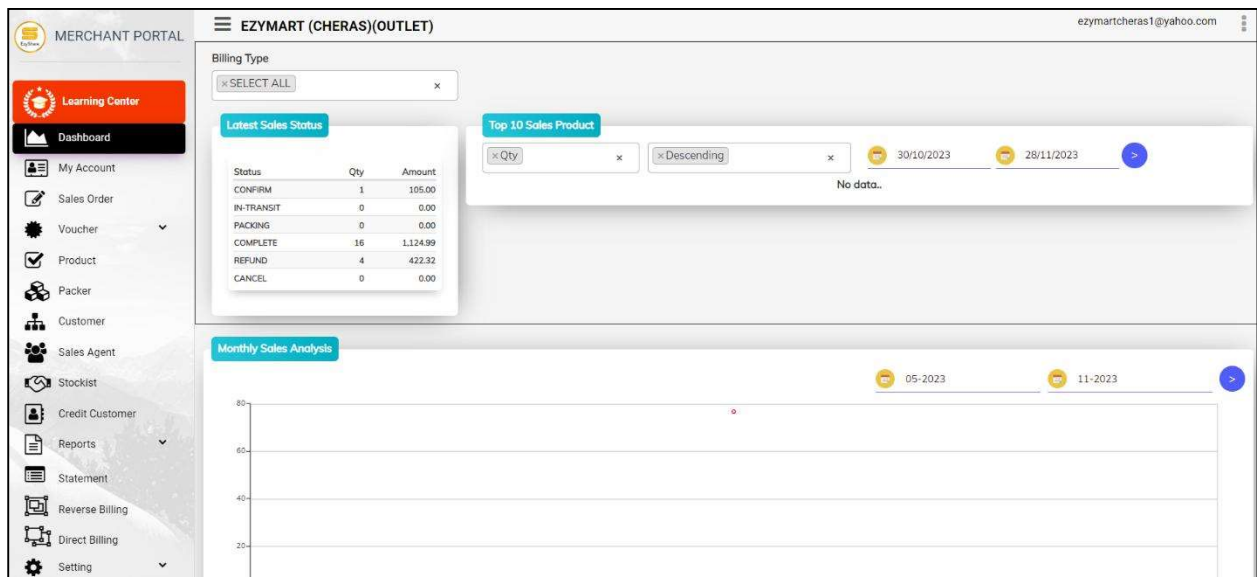
DASHBOARD

3. First is the **Dashboard**. As you can see, the dashboard provides a comprehensive overview of your merchant business, displaying key performance indicators, sales analytics, and real-time data to help you monitor and track your progress.

Click on **Dashboard** button.
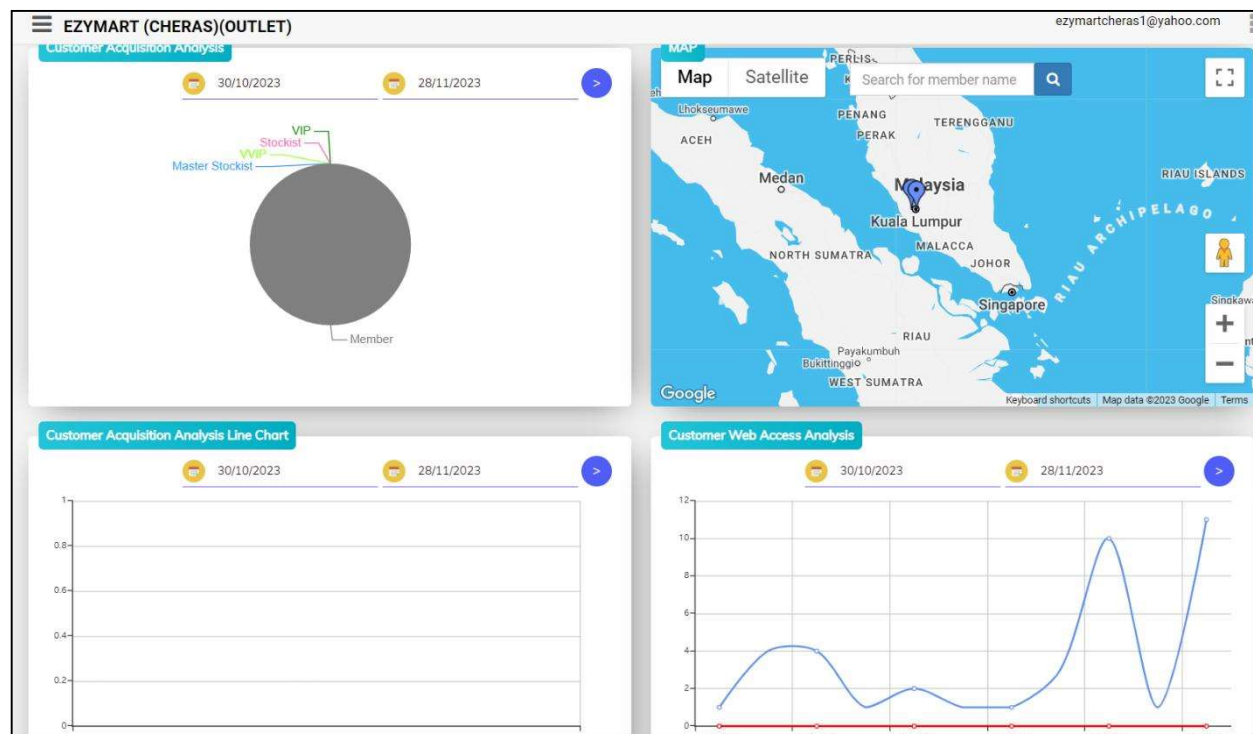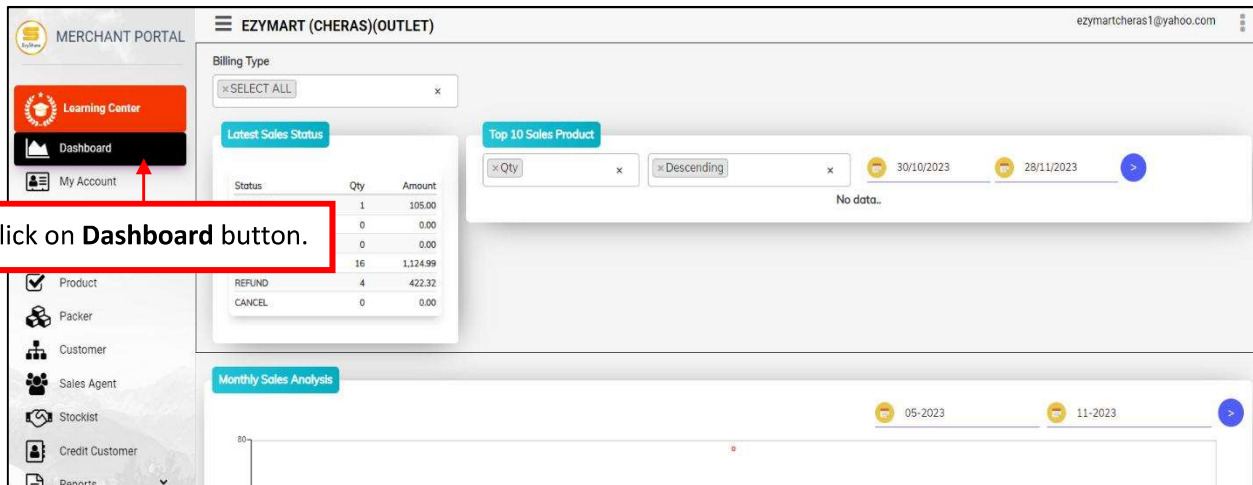
MY ACCOUNT

4. Next is **My Account** page. The user needs to set up a Business Profile, Merchant Page, Outlet, Outlet Business Hour, Deals, Merchant Manager, Default Referral, and Pay Later option.

(i) First, user needs to set up a business profile. All details are mandatory for the user to key in.

(ii) Second, merchant page also needs to be completed. The user needs to provide a Brand Name, which is the company name, Logo of the company (270*150), Cover photo (1024*384), Business Profile, and Scrolling text.

(iii) For the Outlet section, the user needs to add outlets that have. Click '**Add Outlet**' for proceed adding.

Merchant Profile - Outlet
Complete Mechant information for submission purpose

Business Profile   Merchant Page   **Outlets**   Outlet Business Hours   Deals   Merchant Manager   Default Referral

Click **'Add Outlet'** to proceed add.   Add Outlet

× All   ×   Total Outlet : 1

No	Outlet Name	State	Address	Contact Number	Contact Email Address	Status	Action
1	AL NAWARA COMPANY	SARAWAK	Jalan Matang, Petra Jaya, Kuching, Sarawak, Malaysia	01110665429	alnawaraco@gmail.com	Active	✏️ 🗑️

Showing 1 to 1 of 1 entries   < 1 >

The user can edit ✏️
and delete 🗑️
in the action section.

(iv) Next is Outlet Business Hours. User can add their business hour here. Click **'Add Business Hours'** button to proceed added.

Merchant Profile - Outlet Business Hours
Complete Mechant information for submission purpose

Click **'Add Business Hours'** to proceed add.

Business Profile   Merchant Page   Outlets   **Outlet Business Hours**   Deals   Merchant Manager   Default Referral

Add Business Hour

< No data available in table >

Showing 1 to 0 of 0 entries   < 1 >

(v) Deals section is for user to add deals. Click **'Add Deals'** to proceed.

(vi) Next is the **Merchant Manager**. In this section, details will automatically generate for users.

(vii) Lastly is the **Default Referral**. In this section, users need to fill in their member ID for Ezyshare login. Insert a member ID, then click **'Check'**, and details will automatically generate. Click **'Update Default Referral'** to proceed.

SALES ORDER

5. Next interface is **Sales Order**. The Sales Order feature allows you to efficiently manage reserve billing and direct billing.

Click **'Sales Order'** button.

Click the '**Export to Excel'** button to download the document.

6. The user can click on the voucher section to setup a voucher. When you click on the voucher dropdown, three setup options will appear. First is campaign setup, second is voucher setup, and lastly, sponsor setup. Click on the new button for all the setups that the user needs to add.

Then, click add **'New'** to setup the voucher.

Click the drop-down menu in the voucher section.

PRODUCT SETTING

7. Next is the **Product Setup**. How to setup the product? As you can see, the below voucher section got products. Then, click on the *product* section.
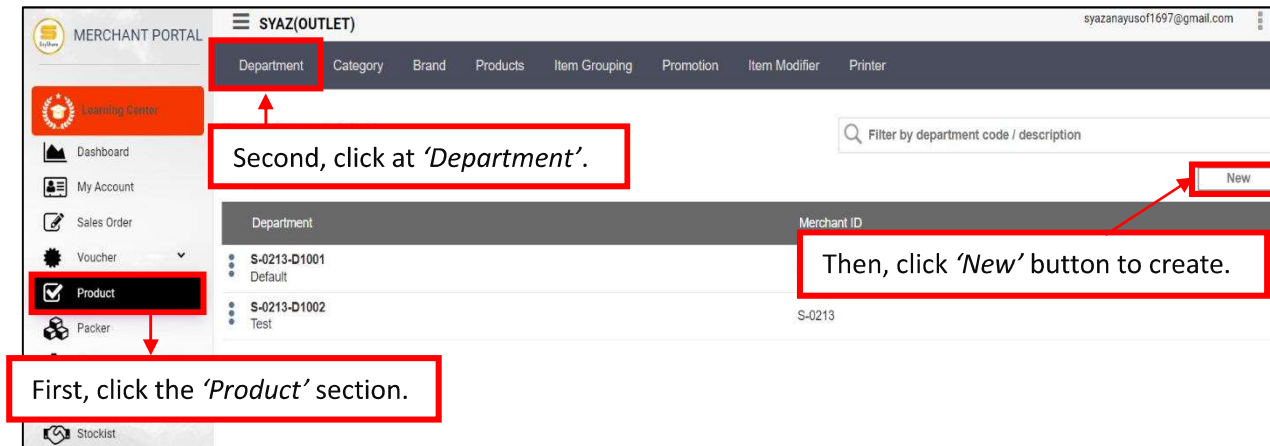
8. After clicking New button, the user needs to insert the department description. Then, click the **Insert** button to proceed. *(Remember: user need to create a department, category and brand first before uploading the product.)*

9. After click Insert button, a new department will be added in department listing. Click ⋮ icon to **edit** or **delete** department.
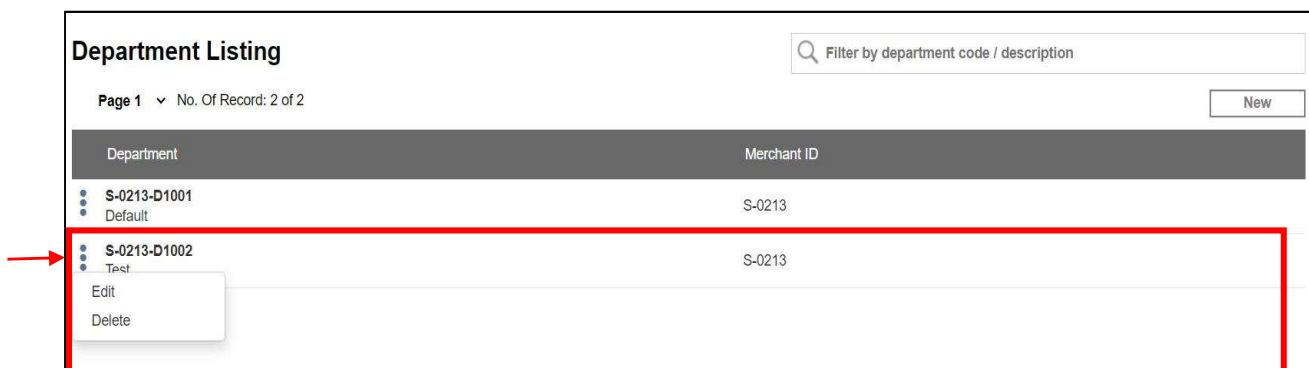
10. In product setup page, click on the **Category** tab. Then, click on **new** button to add new category.

11. First, click on the **select department** drop-down (1). Next, key in the **category description** (2). Then, click on the **insert** button to proceed (3).

12. After click Insert button, a new category will be added in category listing. Click ⋮ icon to **edit** or **delete** category.

13. On the product setup page, click on the **brand** tab. Then, click on the **new** button to add a new brand.
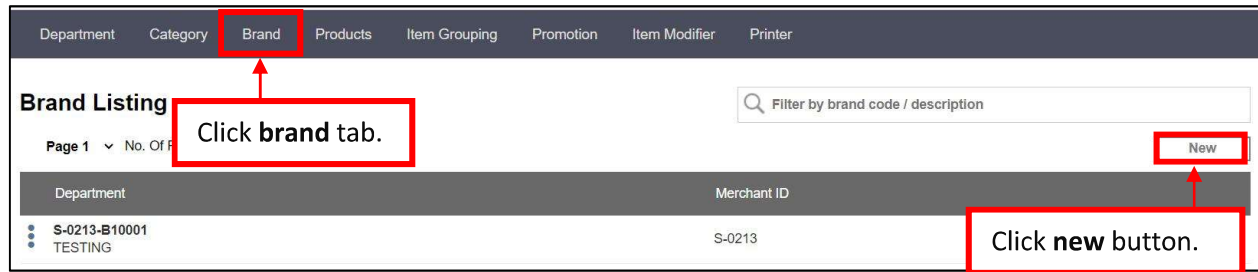
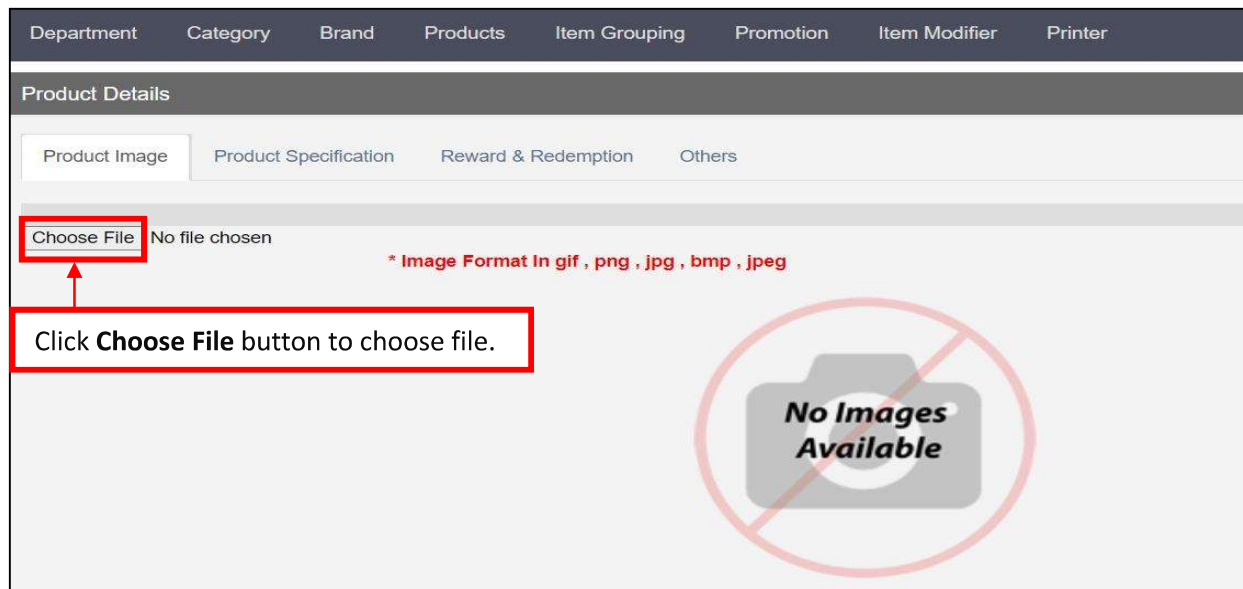14. Insert the **brand** description (1). Then, click on **Insert** button to proceed (2).

15. After click Insert button, a new brand will be added in brand listing. Click ⋮ icon to **Edit** or **Delete** brand.
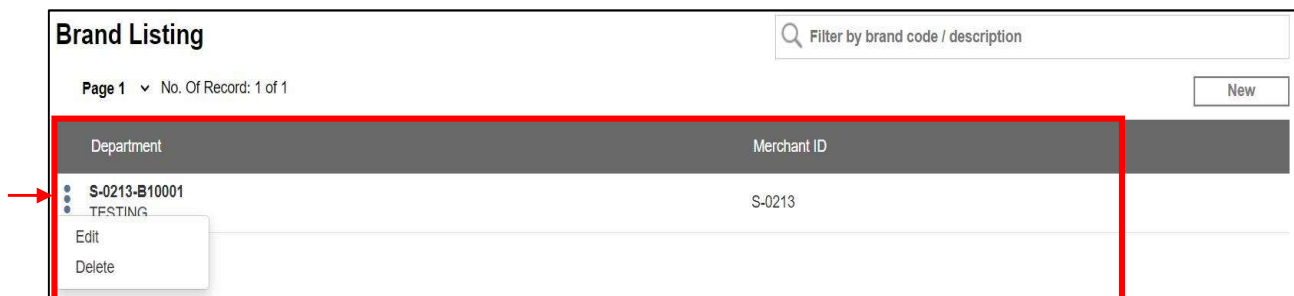
16. In product setup page, click on the **Product** tab. Then, click on the new button to add new product.

Department	Category	Brand	Products	Item Grouping	Promotion	Item Modifier	Printer

Filter by item code / desc | All Approval | All Publish | All Stock Status | All Cost | New

Click **products** tab.

No Items Record Found!

Click **New** button to create.

Page 1

No. of record: 0
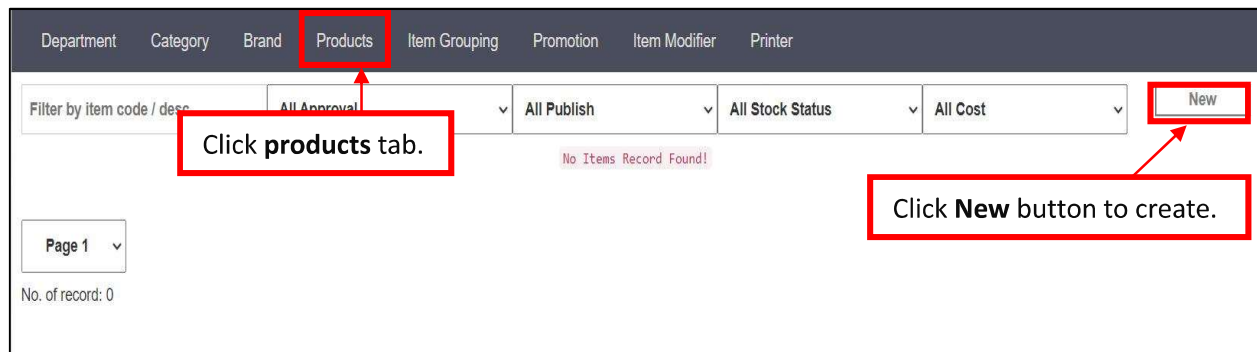
17. First things first, click on the "**Choose File**" button to select the product image. The image needs to be in the following formats: gif, png, bmp, and jpeg.

Department	Category	Brand	Products	Item Grouping	Promotion	Item Modifier	Printer

Product Details

Product Image	Product Specification	Reward & Redemption	Others

Choose File No file chosen

* Image Format In gif , png , jpg , bmp , jpeg

Click **Choose File** button to choose file.

No Images Available

18. Then select the image in your folder and click open to proceed.

Select the **image** and click **open** to proceed.
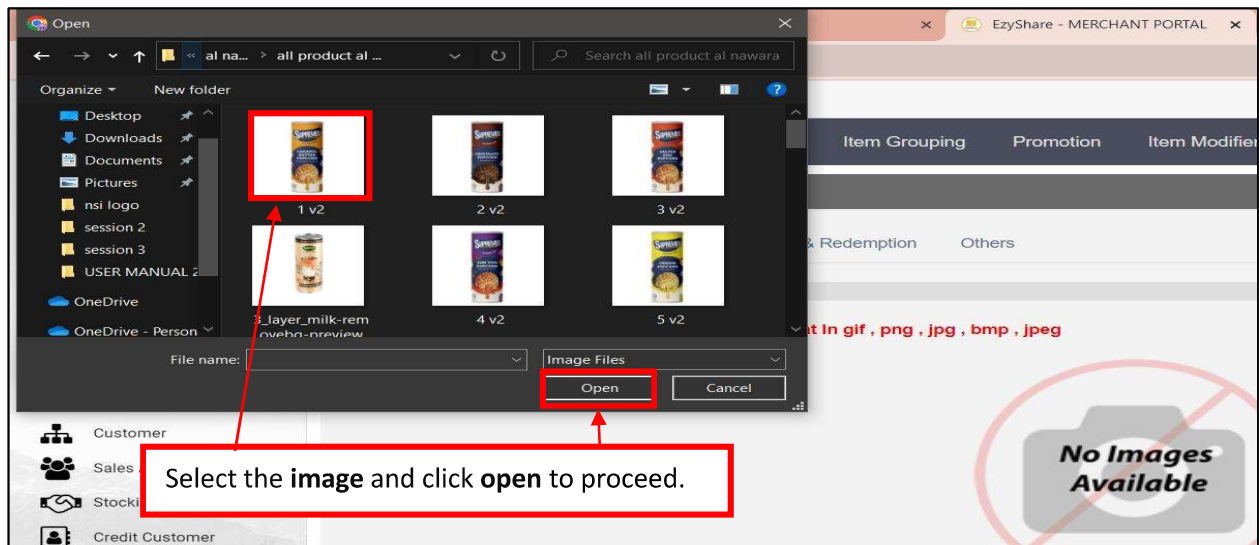
19. After selecting the image, scroll down and set up the basic item details, which are department, category, and brand for the product.

20. After that, if the product required *weight*, the user needed to select *yes*, enter the *barcode* for the product, and then determine the product *type*.

 (* Weight Item: a type of product that is sold by weight rather than a fixed quantity or unit. Ex: vegetable)

Item Code	Example : 4122287	Select **No** for products setting.
Weight Item	NO	
	YES	Enter a **barcode** for the product. (Can create by oneself)
Barcode	NO 543293809	
Type	Standard	
Description		Fill the product description. Can write more than 30 characters.
Description 2 (Optional)		Description 2 is optional. For example, **Chinese characters.**
Short Description * Only show in POS		A short description also needs to be filled up, but you cannot write more than 30 characters. This short description only shows up at EzyPOS.

21. Then, click on **UOM** to select the **Unit of Measurement** for the product.

Item Code		31
Weight Item	- Select UOM - PCS SET BOX	
Barcode	PACK BTL CTN	09
Type	PAIR UNIT BOWL	
Description	TRAY CUP	cken
Description 2 (Optional)	COMB GUNI BDL	Select the UOM.
Short Description * Only show in POS	DOZEN KGS	
Unit of Measurement	- Select UOM -	
Weight (KG)	e.g. 0.00	Next, the user also needs to fill up the information for the *weight, cost,* and *max quantity per transaction* of the product. (But these columns are optional to write in.)
Cost	e.g. 0.00	
Max Qty Per Transaction	e.g. 0.00	
Ezyshare Overriding (%)	0.00	

Insert | Back

Click **Insert** once done filling up.

22. After filing the necessary basic details of the item scroll back up and click on **Product Specification** tab to add specification for the item.

First, click **product specification** tab.

Second, fill in the *product specification details* here.

Product specification details: provide detailed information about the product.

Key elements of product descriptions:

1. Product Title
2. Product Features
3. Specification
4. Benefits
5. Usage and Instructions
6. Images and Visuals

23. User can insert video link for the product. Ex: video tutorial, informative video and so on.
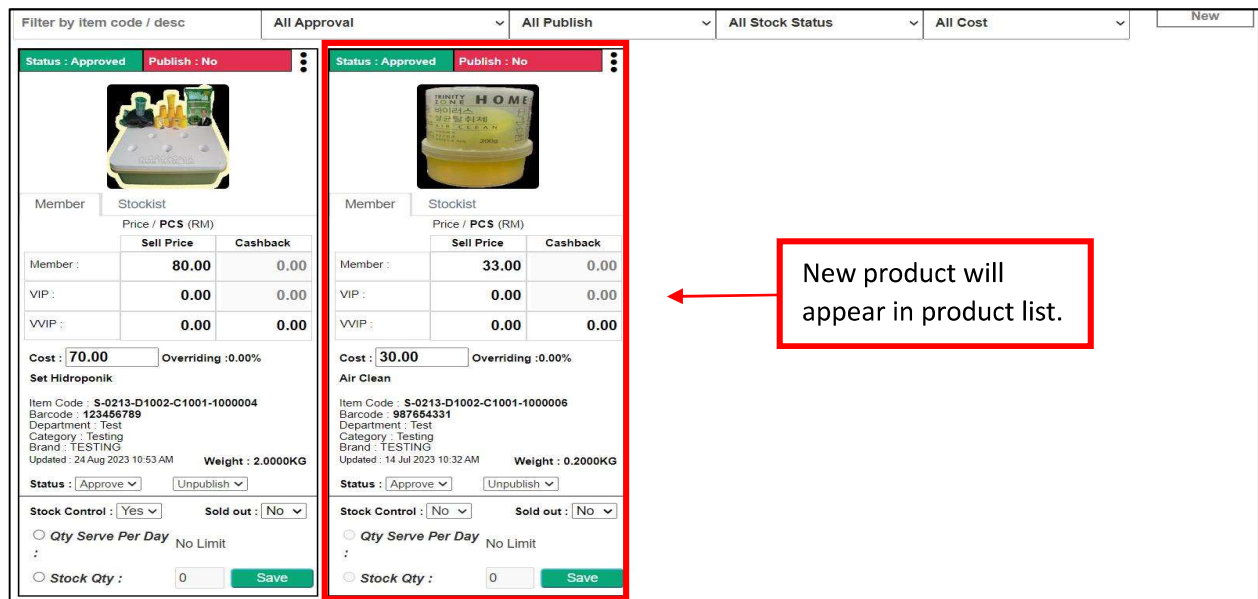
(User can insert up to 3 link YouTube video)-click share, copy and paste.

24. The user can also configure **Reward & Redemption** settings on the same page as the product details. The user can configure the system according to his or her preferences.

Product Details

Product Image   Product Specification   Reward & Redemption   Others

Reward & Redemption Setting

1. Click on *Reward & Redemption* tab.

Redemption Item   No ▾
                      Yes
                      No

Redemption Point

Reward Point   0

2. The user can choose either yes or no. If yes, the user needs to fill up the redemption point and reward point. If not, just ignore this page.

25. Last at product details is the **Others** tab section. The user can configure the other details for the product.

Product Details

Product Image   Product Specification   Reward & Redemption   Others

Click on *Others* tab.

Others

SPP	0
Referral Bonus (Optional - $)	0.00
Network Plus Bonus (Level 1)	0
Network Plus Bonus (Level 2)	0
Merchant Brand Dev. Incentive (VVIP Only)	0
Month End Bonus	0

Printer

User can fill the detail such as *referral bonus, network plus bonus, merchant brand dev. incentive and month end bonus.*

26. After filling in all the details, Click the **Insert** button to add a new product to the system. Once you click the insert button, a **new product** will appear in the merchant portal product list.

New product will appear in product list.

SELLING PRICE (WALK IN, MEMBER, VIP)

27. On the same product page, insert the selling price for **the Member, VIP, VVIP, Stokist, Master Stokist** and actual cost of the item. The user can insert the cashback amount for the VVIP customer.

Our system consists of two types of members: members and stockist. As can be seen, the right side is a member that contains Member, VIP and VVIP, but the left side contains Stokist and Master Stokist.

Click **Save** button, to save selling price.

Prices are typically set at market rates for member with:

Member > VIP > VVIP > Stokist > Master Stockist

28. In product setup page, click on the **Item Grouping** tab. Then, click on the new button to add new item group.
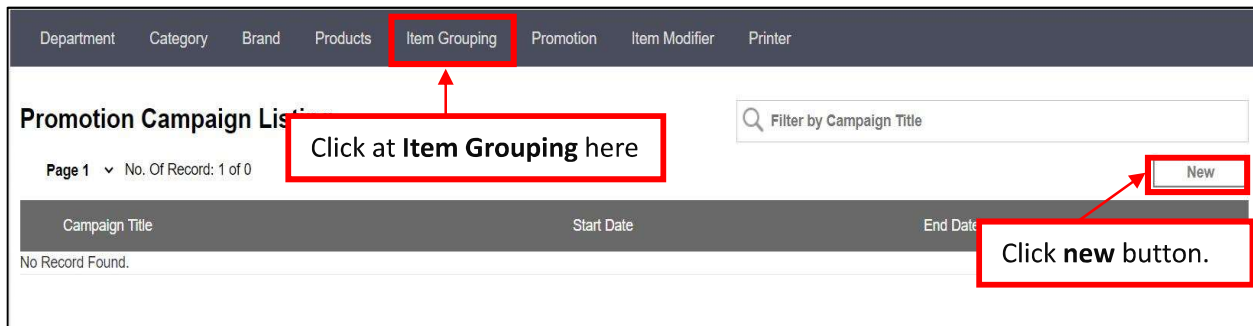
29. Insert the **group title** name, for example 'new arrival' (1). Then, click on **add** button proceed (2).
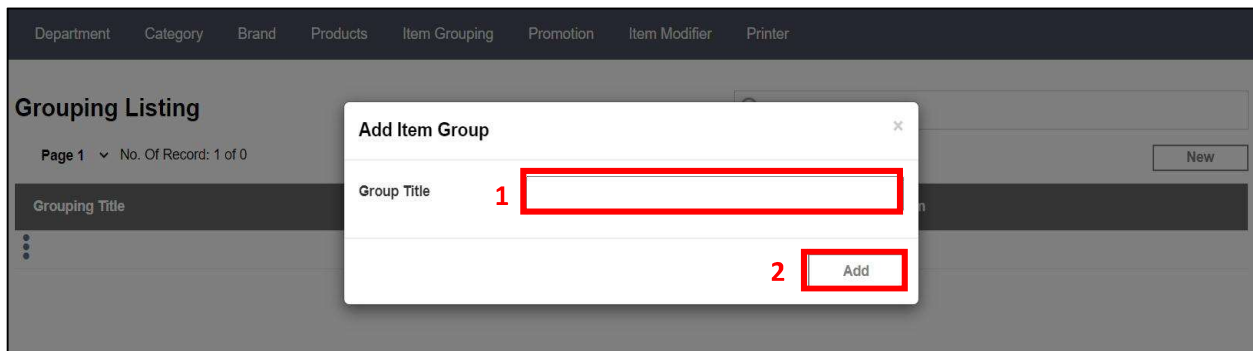
30. Once the user clicks the add button, a new item group will be added to the grouping listing. Then, to add the item to the group, click on the ⋮ icon.
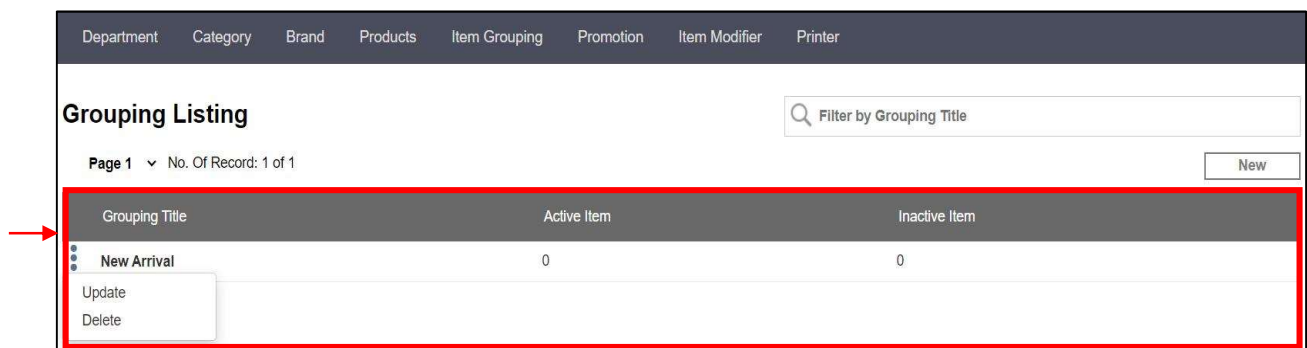
31. In the same page of item grouping, user also can update and delete. Click update button to proceed.

32. After click update, you can choose the icon and banner for the item group.
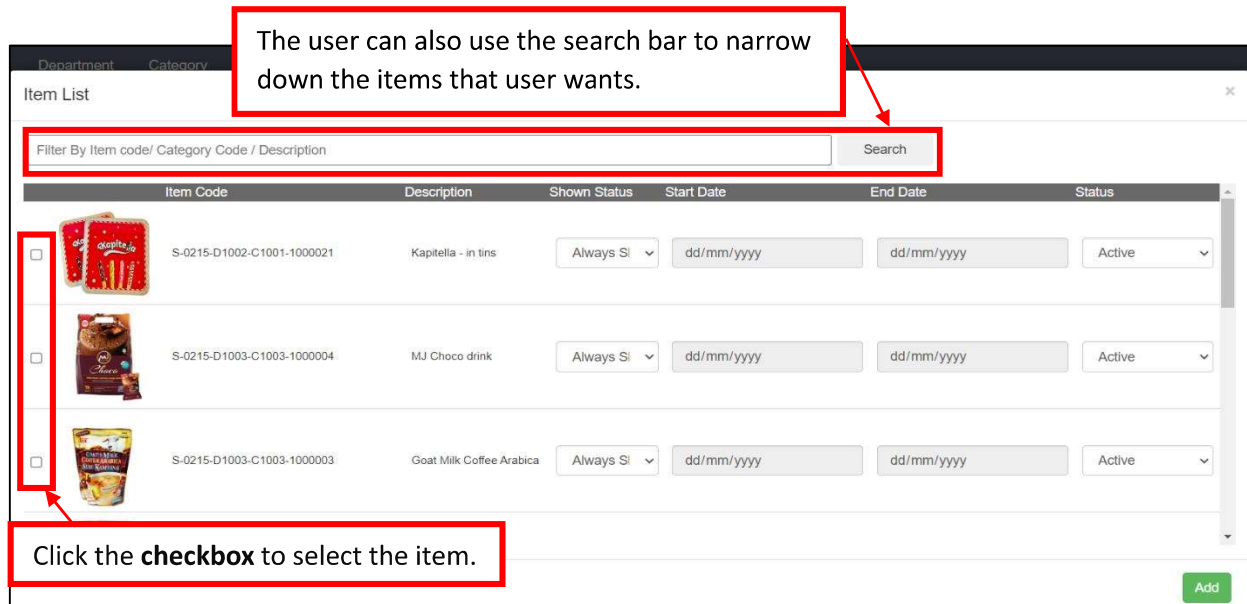
33. After clicking the add item button, the user will see the item list section. On this page, users can use the filter function to search for items or just scroll down the page. To select the item, the user just clicks on the checkbox.

The user can also use the search bar to narrow down the items that user wants.
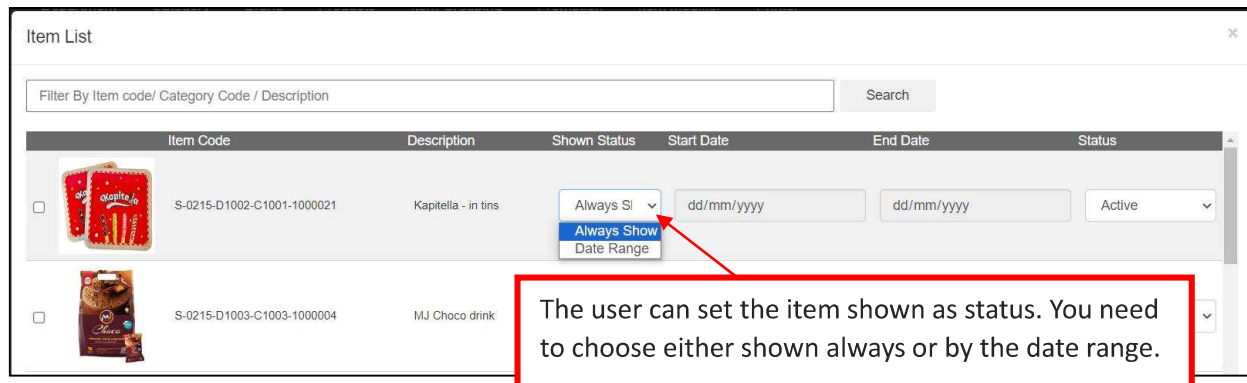
Click the **checkbox** to select the item.

34. Next, set the item shown status, whether to always show or just in a certain date range. If the user chooses the date range status, please insert the start date and end date for the item to be shown.

The user can set the item shown as status. You need to choose either shown always or by the date range.

Shown Status:

1. **Always Show:** will always be visible to users, useful for displaying important items that should always be available.
2. **Date Range:** limited by a specified date range, helpful for displaying seasonal products and limited-time offers.

35. Select the item status, whether it is **Active** or **Inactive**. Just select the drop-down active status to set. Once all are selected, click the **Add** button to proceed.

Status:

1. **Active:** indicates that an item will be published.

2. **Inactive:** indicates that an item will not be published.

36. After adding an item to the item list, scroll down and click the **update** button to proceed.

37. After clicking the update button, you can see the active item and inactive item status in the grouping listing.

Grouping Listing

Filter by Grouping Title

Page 1 ∨ No. Of Record: 1 of 1

New

Grouping Title	Active Item	Inactive Item
New arrival	1	1

Item status will be stated

38. Next is *the promotion maintenance* section. How to add a promotion? First, click on the **promotion** tab. Then, click the **new** button to create a new promotion.

(Users can select products through promotion.)

| Department | Category | Brand | Products | Item Grouping | Promotion | Item Modifier | Printer |

Promotion Campaign Listing

1. Click on **promotion** tab.

Page 1 ∨ No. Of Record: 1 of 0

New

2. Click on **New** button to create.

Campaign Title
No Record Found.

39. After clicking the new button, the user will be shown this interface.

First, the user needs to enter the campaign title.

Next, insert the start date and end date.

Lastly, click the add button to proceed.

40. Once user add the campaign title, click on update button to add item in the promotion.

41. Once the update button is clicked, scroll down and click the **add item** tab to choose an item.

Click on **add item** button.

Then, click on **Update** button.

42. Then, the user can search for the item using the filter function. Once you find the item, click on Add item to proceed.

Click on **Add**

43. Next fill, the necessary information for the promotion.

2. Insert the sell price for different type of customer.

1. Insert the discount amount according to discount type.

Promotion Item Setting

	Sell Price	Discount Type	Discount	Promotion Price	Cashback
Member :	33.00	Discount By Percentage (%)	0	33.00	0.00
VIP :	0.00	Discount By Percentage (%)	0	0.00	0.00
VVIP :	0.00	Discount By Percentage (%)	0	0.00	0.00
Stockist :	0.00	Discount By Percentage (%)	0	0.00	0.00
Master Stockist :	0.00	Discount By Percentage (%)	0	0.00	0.00

Air Clean
987654331

4. Select the discount type, whether discount by percentage or amount. The user can choose either one.

5. Insert the promotion price.

3. Insert the cashback amount for VVIP, Stockist, and Master Stockist.

44. The user can also add another setting, such as reward & redemption items and member reward point. After that, click on the **add item** button to add.

Reward & Redemption | Others

Redemption Item

Member Level	Redemption Point	Member Reward Point
Member :	0	0
VIP :	0	0
VVIP :	0	0
Stockist :	0	0
Master Stockist :	0	0

Click add item button. → Add Item

45. Once the button **Add Item** is clicked, the item promotion will be added to the item promotion list. Then click on the **update** button to proceed. The user also can **edit** and **delete** promotion.

STOCK CONTROL

46. Go back to the product list section. Then scroll down to the stock control section.

47. Next, enter the stock quantity amount. If the item is not in stock, then choosing the 'yes' option indicates that the item has already sold out.

If the user prefers to see if an item is sold out on apps, select 'yes'.

Insert the stock quantity.

ITEM MODIFIER

48. This is an additional setting for EzyPOS. Click on the product section and click on the item modifier tab. Then click **Create Modifier Group**.

Second, click at **item modifier** tab.

First, click at **product** section.

Third, click here to create.

PRINTER SETUP

49. By selecting the printer tab, the user can configure the printer. Then click Add Printer to add. But make sure the printer is using a network printer.

50. Once you click **Add Printer**, fill up the information inside. Then click an **insert** to add to the printer listing page.

PACKER MAINTENANCE

51. Click the **Packer** option to set up. Then click the **add** button to create.

52. Next, fill in all the information needed.

     1. Enter the parker's name

     2. Insert packer ID

     3. insert the contact number

     4. Insert the email

     5. Select the packer position

53. Once user click add button, a new packer will be added in the system.

Click this button 🗑 to delete

Delete	Edit	Packer Id	Packer Name	Contact Number	Email	Position	Last Updated Date
🗑	✎	H00001	Haziq	0133266348	haziqrahman@gmail.com	Packer	7/11/2023 7:33:12 AM

All Position

Click this ✎ button to edit

Add
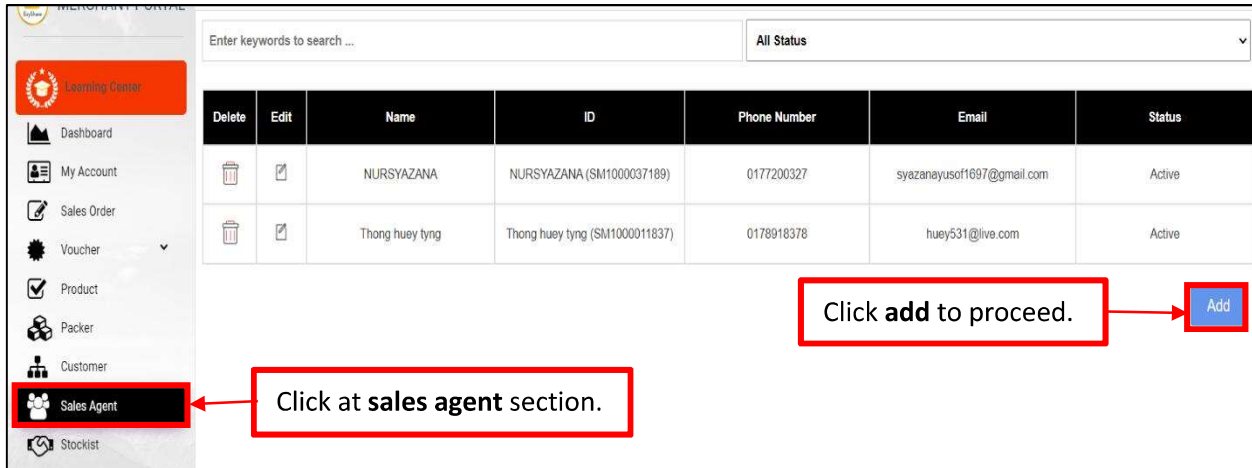
CUSTOMER

54. This page is for customer details. Once the user completes the transaction and so on, customer details will appear on this page. The user can filter by name, phone, and ID.

Click at customer section.

SALES AGENT

55. Click **Sales Agent** section. Click **Add** to add new.

56. Once clicking **add** button, scroll down and click the **confirm** button to proceed. This just needs a number phone, other details will auto-in.

(*Before creating a sales agent, the user needs to make sure that the agent needs to register Ezyshare apps first before they can be a sales agent.)

57. This page is for outlet that have stockist under user. So, just click at **stockist** section and click add new to create stockiest.

Click **add new** to proceed with adding.
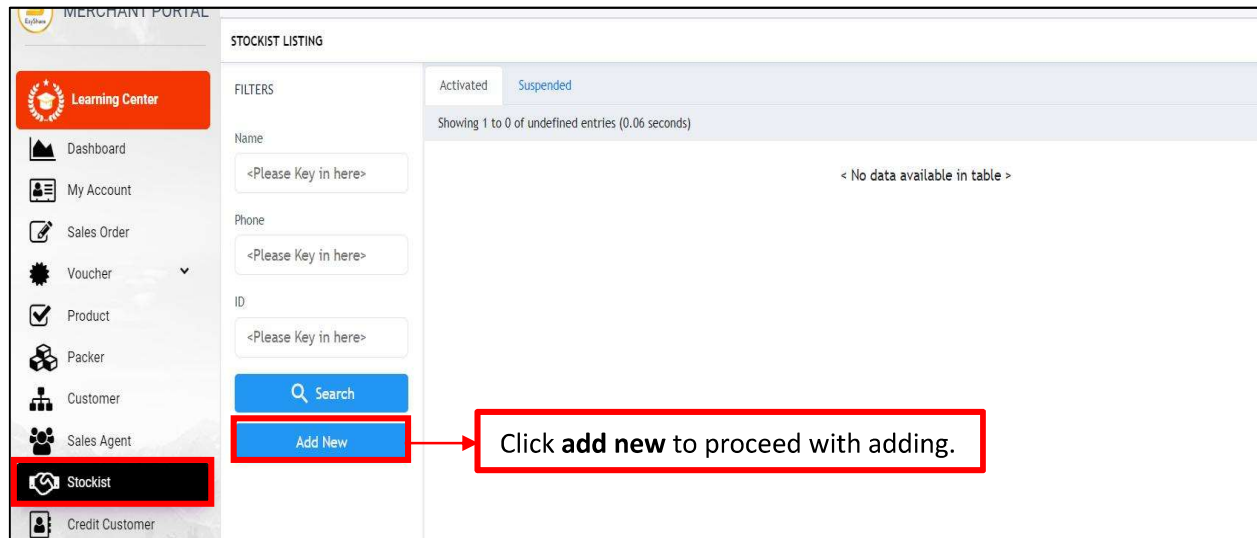
58. Once the user clicks Add New, this interface will pop up. Then the user may key in a phone number and click the search button. Then, details will be automatically filled out.

First, insert phone number and emails of customer.

Second, click search button to search customer details.

Third, click assign button to assign customer.

Fourth, user can click the back button if you don't want to proceed anymore.
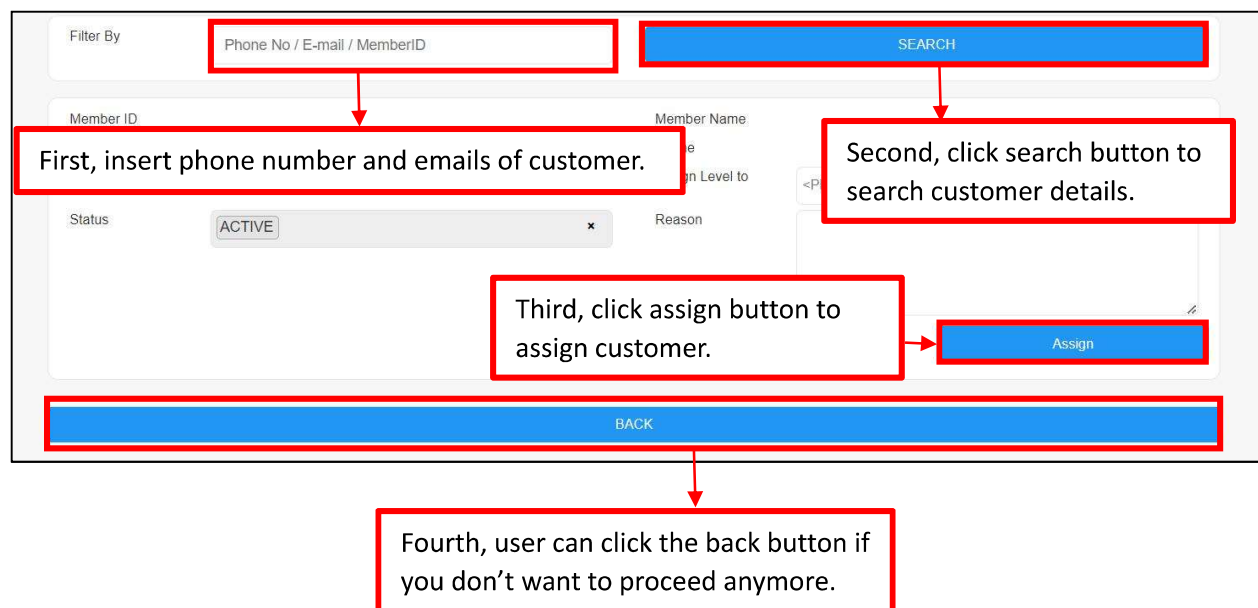
CREDIT CUSTOMER

59. Next is the **credit customer** option. Click the credit customer option to add a customer for a sales order. The user can **delete** and **edit** details once added.

60. Once the user clicks the add button, they can insert company name, account debtor code, address, etc. Once complete fill it in, scroll down, and click the add button below to proceed.

REPORT

61. Next is the **report** option. Click the report drop-down and choose the report that the user needs. Each report can be exported to Excel.

Click this button to export to excel

This report includes total sales with shipping, net sales, net sales shipping, and refund amounts.

STATEMENT

62. This statement option is a detail that customers provide. Once the transaction is complete, details will show up here.

Click this button to expand the details.

Click statement button.

REVERSE BILING

63. Login to the merchant portal and click on the **reverse billing** option on the menu.

User can use filter function to find the bill.

Click [🔍] button to search.

Click this button to export the report in excel format.

64. This is an example of the **reverse billing report** interface in the system.

Click [⋮] this button to print the bill.
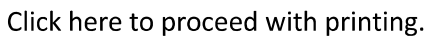
65. Once ⋮ clicked, invoices will pop up. The user can print by clicking the print button.

DIRECT BILLING

66. Click on the **direct billing** option. Once the transaction is completed, the details will be listed here.

SETTINGS

67. Click on the **setting** option, click on the drop-down, then click on direct billing. The user needs to fill up the invoice/do details, which are the description, headers 1 and 2, and footers 1, 2, and 3. Last, click **Update** to proceed update all details.

Click setting option. Then, click at direct billing.

Click update to proceed.

TERMINAL MAINTENANCE

68. The EzyPOS application provides merchants with various functions to facilitate transaction management and efficient payment processing.

❖ Install EzyPOS application.

If you have an Android phone, you can download the EzyPOS app at
https://ezyshare.online/ezyshare/resources.aspx

If you don't have an Android phone, you can still access EzyPOS through its website at
https://pos.ezyshare.online

69. Create a login ID and password at the Backoffice.
(Login in the merchant portal and select the terminal option in setting module.)

70. To add new terminal, click on create new button.
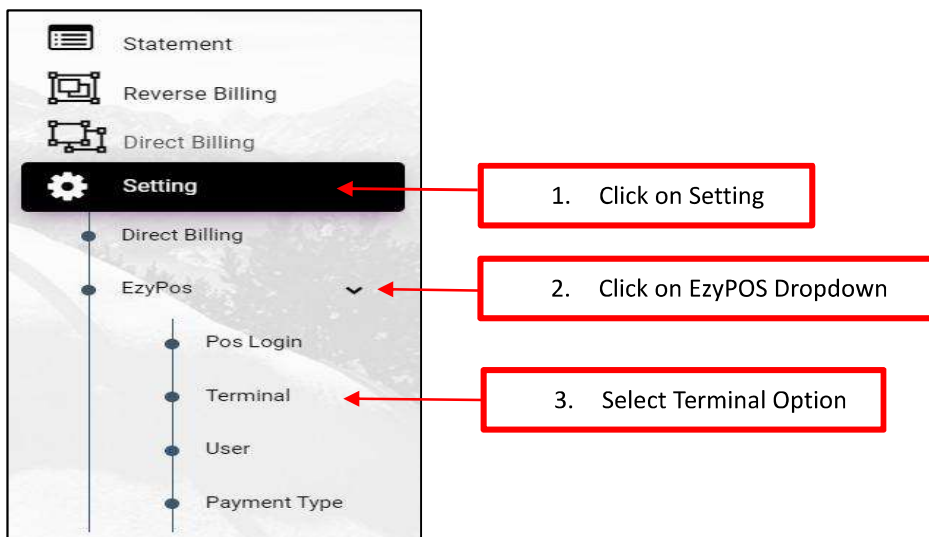
Click here to Create New

Export to Excel

The terminal details

Can filter by Date range and by Location

71. Fill in the necessary information and click the create button.

1. Key in the terminal location name.

2. Select the outlet terminal.

4. Then, click on the add button to proceed.

3. Key in the terminal number here.

72. Once you add terminal number click on **+** button to add "Cashier" for the terminal.

73. Enter the cashier ID or Name in the filter and click ☑ tick symbol to add the cashier in the terminal.

74. Once you add the cashier, click on **Yes** option if the cashier is using the apps.

** If user select **No** at isApp, it means that the cashier can only use the website and cannot use Android apps.*

75. Then scroll to the right and fill the necessary information if needed.

76. In the same part, the user needs to scroll to the side to key in the header and footer if necessary. Then, click on **update** button to update terminal in the system.

Fill in Header and Footer (optional)

Click Update to save the information.

CASHIER / WAITER MAINTENANCE

77. First, login in the merchant portal and select the User option in setting module.

1. Click on Setting

2. Click on EzyPOS Dropdown

3. Select User Option
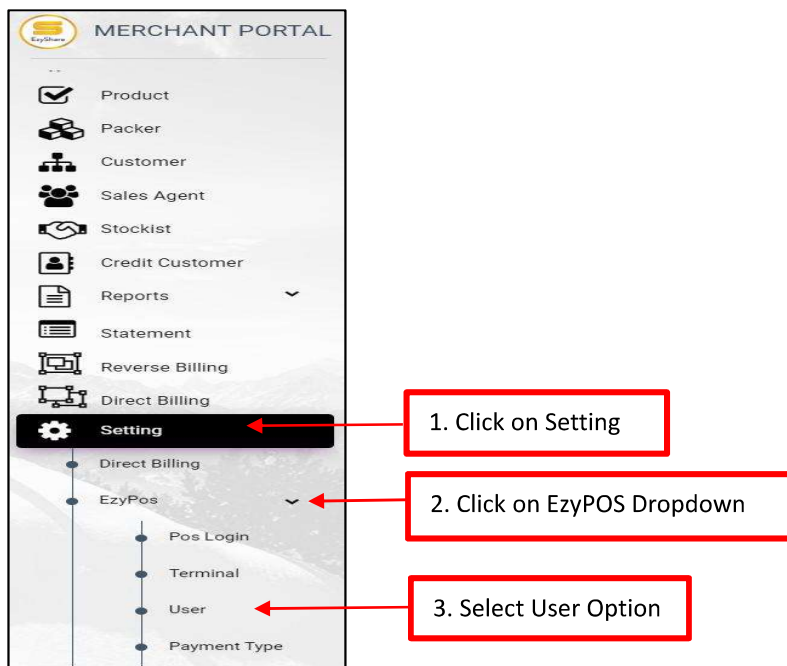
78. To add new Cashier/Waiter, click on create new button.

79. Once clicked, the user may insert user name and password to log in.

80. Once user have already entered User Name and Password, they can tick any access level needed for the Cashier / Waiter.

4. Select the access level

Cashier Access ☐ YES — 1. Tick YES if the user needs cashier access.

Cashier ☐ YES
Price Change ☐ YES
Apply Discount ☐ YES
Void Product ☐ YES
Void Receipt ☐ YES
Sync Data ☐ YES

Waiter ☐ YES
Manager ☐ YES

3. If the user is a waiter or manager click YES.

End Day Closing ☐ YES
View Close Report ☐ YES
Setting ☐ YES
Refund ☐ YES
Exchange Item ☐ YES

2. Select the access level

5. Lastly, click create button. → Create   Cancel

81. Once the user has already clicked the create button, a new cashier or waiter will be added to the user listing.

The user can click this action button in order to edit or delete the cashier / waiter listing.

EZYPOS APPLICATION (FRONTEND)

82. Login and Activate EzyPOS App License (Cashier log in)
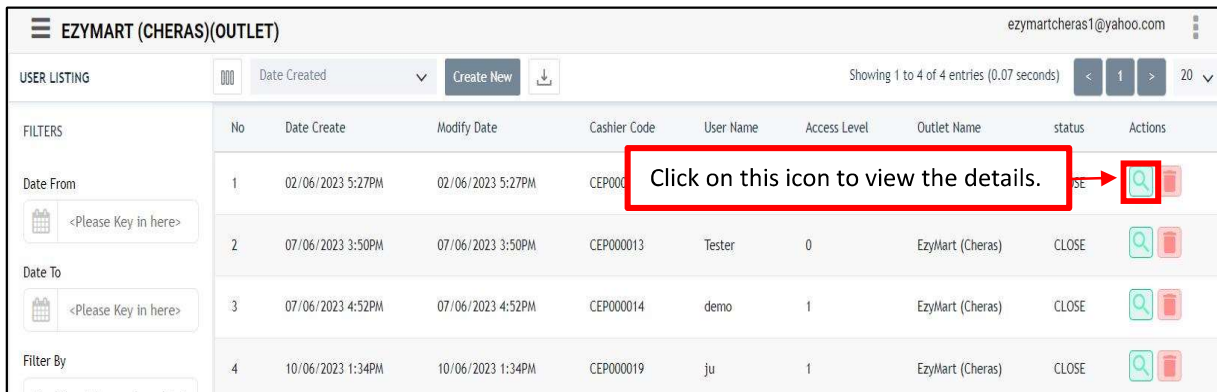
    Go to https://ezyshare.online/ezyshare-merchantportal/production/Login.aspx and key in your Email/ Phone Number and Password

83. Click on sub-menu to view terminal list.
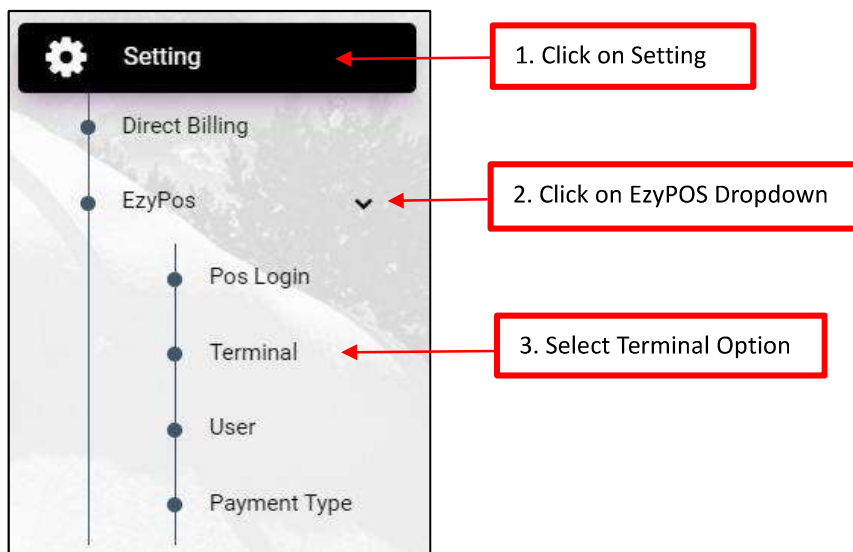
84. Choose the outlet and then click on the magnifying glass icon 🔍 to view the detail.
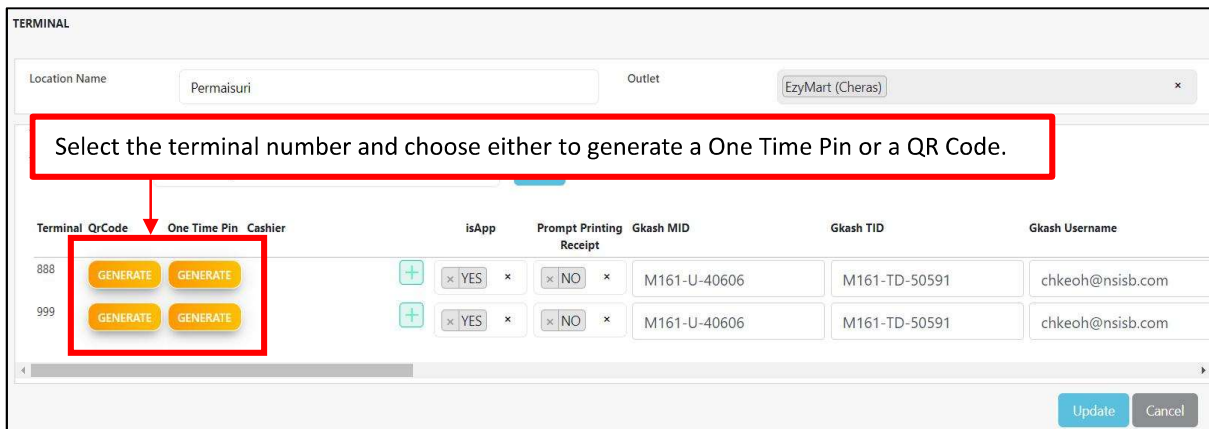

85. Once you click on the magnifying glass icon 🔍 you will be taken directly into terminal list detail. Choose the terminal number you want and generate the code to activate the license.

One Time Pin

QR Code

86. After that, open EzyPOS Application and click on active license button.

Click the Active License button to activate.
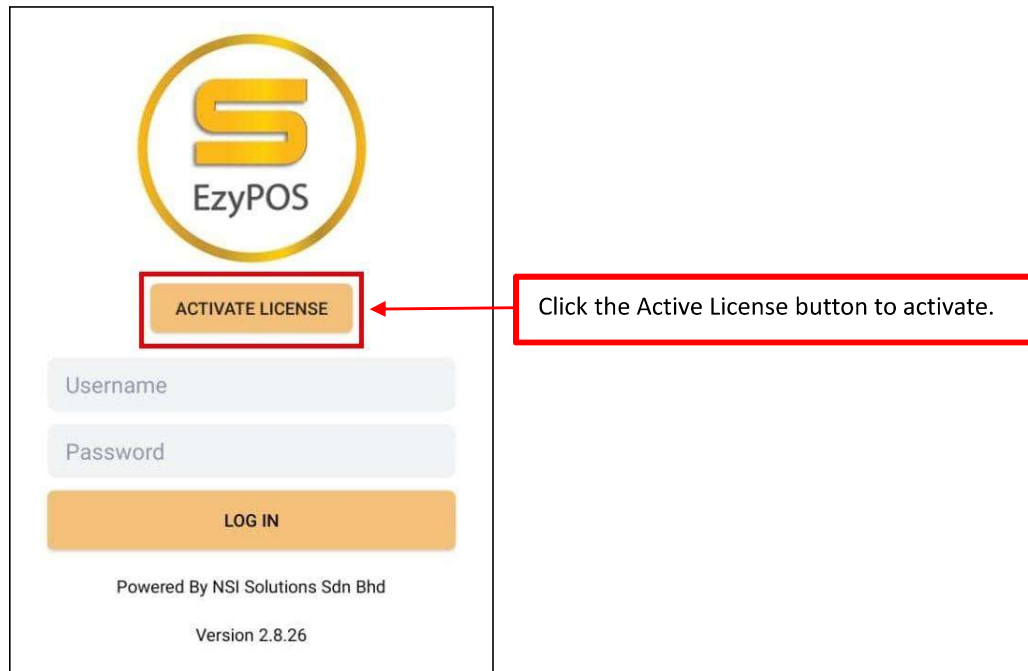
87. Then select whether you want to activate the license by QR Code or One Time Pin.

The user can choose either one to activate.