



Merchant Best Practices

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Redemption Overview

Redemption Reference Video: <https://youtu.be/apXIF-z1A3o>

Conpoto Web portal URL: <https://apps.conpoto.com/account/login>

Scan App: 'Conpoto Scan'

Redemption is a 2 step process

- 1.) Validate on Conpoto Scan or Web URL
- 2.) Enter in the redemption amount in your P.O.S. (If using software/cloud based P.O.S. you will add another form of payment on the backend in order to keep accounting & tracking accurate) See below for additional information how to complete this process

If Certificate Value is Higher than Purchase Total:

Example: \$10 community cash & \$8 Purchase total

- Redeem with 'Conpoto Scan' at time of purchase
- Scan QR Code or enter in Alphanumeric Code
- Enter in the amount you would like to redeem (Amount available shown Below)
- Click Redeem
- Write on Paper Cert Remaining Balance and return to Customer

If Certificate Value is Lower than Paper Certificates:

Example: \$10 community cash & \$25 Dollar Total

- Collect paper Certificate and redeem via 'Conpoto Scan' or through the online portal: <https://apps.conpoto.com/account/login>
- Scan QR Code or enter in Alphanumeric Code
- Enter in the full amount of the certificate
- Click Redeem

Conpoto Account Setup (User Accounts)

To add additional Users

Login to the web portal > Administration Tab > Users > Add new user

- Whichever email was used to create the original account will be listed as the Admin account and will automatically receive weekly redemption summaries
- You can customize the roles each user account will have access to along with which notifications each user can receive
- We recommend making one server/redemption only account that all your employees will be able to use to validate gifts.
- You can make unlimited User accounts and easily remove an account if needed

How to Handle Tips

- You can redeem a second time with the same code if the customer would like to leave a tip for the server.
- Please enter in the amount the customer would like to tip and follow normal redemption steps
- The restaurant should pay the server in cash that tip as they will be reimbursed during the next payout day from the chamber.

P.O.S. Add a form of Payment

Clover

1. Accessing the Virtual Terminal
 - Log into your Clover Web Dashboard using a computer, tablet, or smartphone..
 - Navigate to the Virtual Terminal section, which allows you to process payment transactions via the internet.
2. Adding a New Payment Method
 - Select the card type from the dropdown box or click on one of the brand logos [3](#).
 - Choose the Transaction Origin (Retail, Electronic Commerce, or Mail Order/Telephone Order) [3](#).
 - Select the appropriate Transaction Type (e.g., Sale for immediate charging)
3. Entering Payment Details
 - Fill in the required payment information, which may include:
 - Card number
 - Expiration date
 - Card Security Code (CVV)
 - Customer contact information [3](#)
 - If applicable, enter additional details such as:
 - Number of installments (for installment payments)
 - Recurring payment information (for subscription-based transactions) [3](#)
4. Finalizing the Payment Method
 - Review all entered information for accuracy.
 - Submit the payment method to add it to your Clover POS system.
 - The new payment method will now be available for future transactions.

Note: Clover allows for various payment types, including credit cards, debit cards, gift cards, and contactless payments. You can also set up custom tenders for specific payment methods [1](#).

Toast

1. Navigate to the Toast backend:
 - Log in to Toast Web
 - Go to "Payments" > "Payment Methods" > "Other Payment Options" [1](#)
2. Create a new payment option:
 - Click the "+ Add" button to create a new payment option [1](#)

3. Configure the payment option:
 - Enter a name for the payment option
 - Add a description if necessary
 - Select which locations can use or edit this payment type
 - Choose whether manager approval is required
 - Set other settings such as tax exemption and tip options
4. Save and publish:
 - Click "Save" to store your changes
 - Select "Publish Now" to push the new payment option to the POS system¹
5. Verify the new payment option:
 - The new payment option will appear on the POS payment selection screen under standard payment options

Note: Remember to adjust settings according to your specific needs, such as manager approval requirements or tax exemption status. Once published, the new payment option will be available for use in your Toast POS system.

Square

Access Square Dashboard

- Log in to your Square account at squareup.com
- Navigate to the Dashboard

2. Open Payment Methods

- In the left sidebar, click on "Settings"
- Select "Payment Methods"

3. Add Custom Payment

- Scroll down to "Other Payment Types"
- Click on "Add Custom Payment"

4. Configure the New Payment Method

- Enter a name for the new payment method
- Choose an icon to represent it (optional)
- Select whether it should appear as a payment option on invoices

5. Set Additional Options

- Decide if you want to track this payment method in reports
- Choose whether to allow partial payments with this method
- Determine if you want to enable this payment type for all or specific locations

6. Save and Activate

- Click "Save" to create the new payment method
- The new option will now be available on your POS system

7. Verify on POS

- Open your Square POS app
- Start a new transaction and go to the payment screen
- Confirm that your new payment method appears as an option

Note: Remember to adjust settings according to your specific needs, such as manager approval requirements or tax exemption status. Once published, the new payment option will be available for use in your Square POS system.

Aloha

1. Log in to the Aloha Back Office system for a specific store [3](#).
2. Navigate to Settings & Privacy > Payments [3](#).
3. Under the 'Accepted Payment Methods' group bar, select the payment methods you want to accept for your store [3](#).
4. For more detailed configuration, go to Maintenance > Payments > Tenders [4](#).
5. In the Tenders function, define the new payment type you want to add [4](#).
6. Choose the appropriate tender type (e.g., cash, credit card, gift card) [4](#).
7. Configure the tender options:
 - Select 'Active' to make the tender available for use in the Front of House (FOH) [4](#).
 - Choose 'Can refund' if you want to allow refunds for this payment method [4](#).
 - For credit cards, select 'Allow manual entry' if you want to permit manual entry of card numbers [4](#).
8. Save your changes.
9. For Quick Service restaurants, access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels to add the new tender button to the appropriate panel for display on the FOH terminal [4](#).

Nextep

1. Accessing the System
 - Log in to the Nextep online portal, which is accessible to customers and Xenial Support⁹.
2. Navigating to Payment Settings
 - Navigate to the system management section, which likely includes POS button layouts and other settings ⁹.
3. Adding a New Payment Method
 - Locate the payment method or Speed Pay section in the upper-right of the interface ⁴.
 - From the Button dropdown, select the button where you want to add the new payment method ⁴.
4. Configuring the Payment Method
 - Choose the type of payment method you want to add (e.g., credit card, mobile payment, etc.) ⁷.
 - Configure the necessary details for the payment method, which may include:
 - Payment method name
 - Associated icon or display text
 - Integration settings (if applicable for third-party payment systems)
5. Saving and Applying Changes
 - Save the new payment method configuration.
 - Apply the changes to update the POS system.
6. Testing the New Payment Method
 - Perform a test transaction to ensure the new payment method is working correctly.
 - Verify that the new payment option appears on the POS interface and functions as expected.

Reporting

- You can elect to receive weekly redemption reports by editing your user account
- To print out a redemption summary follow these steps
 - Reporting Tab and select redemptions

- Select your desired date range
- Click Download and print the document (Example below)

Redemptions							
12/01/2024 - 12/31/2024							View Download
Issue Date	Redemption Date	Merchant	Location	Product	Code	Is Paid?	Amount
10/30/2024 2:23 PM	12/18/2024 6:20 PM	CRAZY HORSE STEAKHOUSE	CRAZY HORSE STEAKHOUSE	\$20 West Coast Cash	7QOTSRH	Yes	\$20.00
10/30/2024 2:23 PM	12/18/2024 6:20 PM	CRAZY HORSE STEAKHOUSE	CRAZY HORSE STEAKHOUSE	\$20 West Coast Cash	0R69PMO	Yes	\$20.00
12/9/2022 6:25 AM	12/18/2024 5:47 PM	CRAZY HORSE STEAKHOUSE	CRAZY HORSE STEAKHOUSE	\$25 West Coast Cash	6B2P53	Yes	\$25.00
11/14/2024 11:55 AM	12/18/2024 1:20 PM	CRAZY HORSE STEAKHOUSE	CRAZY HORSE STEAKHOUSE	\$10 West Coast Cash	8GJ7KAP	Yes	\$10.00
11/4/2024 3:27 PM	12/17/2024 7:26 PM	CRAZY HORSE STEAKHOUSE	CRAZY HORSE STEAKHOUSE	\$5 West Coast Cash	3BAGIF8	Yes	\$5.00
11/14/2024 11:55 AM	12/17/2024 7:26 PM	CRAZY HORSE STEAKHOUSE	CRAZY HORSE STEAKHOUSE	\$5 West Coast Cash	LCJFDHT	Yes	\$5.00
10/10/2024 8:55 AM	12/17/2024 7:26 PM	CRAZY HORSE STEAKHOUSE	CRAZY HORSE STEAKHOUSE	\$5 West Coast Cash	GIYPPQ2	Yes	\$5.00
9/19/2024 2:49 PM	12/17/2024 7:26 PM	CRAZY HORSE STEAKHOUSE	CRAZY HORSE STEAKHOUSE	\$5 West Coast Cash	DX9B8CL	Yes	\$5.00
10/8/2024 12:39 PM	12/17/2024 6:17 PM	CRAZY HORSE STEAKHOUSE	CRAZY HORSE STEAKHOUSE	\$25 West Coast Cash	XXIWK2I	Yes	\$25.00
10/22/2024 3:14 PM	12/17/2024 5:22 PM	CRAZY HORSE STEAKHOUSE	CRAZY HORSE STEAKHOUSE	\$10 West Coast Cash	IPKGNQS	Yes	\$10.00
10/22/2024 3:14 PM	12/17/2024 5:21 PM	CRAZY HORSE STEAKHOUSE	CRAZY HORSE STEAKHOUSE	\$10 West Coast Cash	DGJRCRG	Yes	\$10.00
10/22/2024 3:14 PM	12/17/2024 5:21 PM	CRAZY HORSE STEAKHOUSE	CRAZY HORSE STEAKHOUSE	\$10 West Coast Cash	M97H3VQ	Yes	\$10.00

- To view your payment history follow these steps
 - Head to Reporting and Select view merchant payments
 - You can select your desired date range and view all recent payments
 - You have the ability to download and print the file by selecting "Download File"

Payment History					
12/01/2024 - 12/31/2024					View
Establishment	Payment Processing Date	Batch Type	Batch Total	Action	
West Coast Chamber of Commerce	12/20/2024	\$0.00	Merchant Payment	\$800.40	Download File
West Coast Chamber of Commerce	12/13/2024	\$0.00	Merchant Payment	\$133.40	Download File
West Coast Chamber of Commerce	12/06/2024	\$0.00	Merchant Payment	\$404.80	Download File