SumUp Solo: Set-up guide

Once your new SumUp Solo Card Reader has arrived, all that's left is to set it up. Here's how to take your Solo from box to counter so you're ready to start accepting payments.

Note:

Be aware that your Solo requires a Wi-Fi connection to update during the set-up process. (It doesn't need a wifi connection after updating).

How to set up my Solo

After you <u>sign up for SumUp</u> and <u>activate your profile</u>, you can set up your Solo like so:

1. First up, power your Solo on with the On/Off switch on its right side. It's the button that looks like the SumUp logo.
2. Tap the drop-down menu to select your preferred language from the menu and hit "Let's start".
3. Log in to your SumUp profile.

4. You'll be redirected to your Wi-Fi settings so you can <u>connect your Solo</u> to a Wi-Fi network.

   Note: Your Solo can only connect to secure networks.

5. You'll be prompted to update your Solo. Simply tap "Download & Install" to get started. This will only take a couple of minutes.

Once the update is complete, your Solo is fully set up and ready to <u>start accepting payments</u>.

Note:

If you haven't created a SumUp profile, tap "I don't have a profile" on the login screen to bring up a QR code. Scan the code or type in the associated address to find where you can <u>create a SumUp profile</u>.

SumUp Solo: Manual

Unlock the full potential of your SumUp Solo Card Reader with this guide to the all of its features and functionalities, from technical advice to operating tips.

Set up my Solo

We've created a handy step-by-step guide to <u>setting up your Solo</u> that takes you from unboxing to ready to start accepting payments. Once you're ready, there's also a guide on <u>how to accept payments</u>.

Settings and features

Tap or drag down the downward-pointing arrow at the top of your Solo's screen. From here, you can access a variety of features and settings for your Solo.

Settings

About

The "About" section contains information about your Solo and SumUp profile, including your Merchant ID, the device's serial number, and your current software version.
You can also log out of your SumUp profile from here by selecting "Log out" and then hitting "Log out" again to confirm.

Software update

From here you can check your current software version and download updates to keep your Solo running at its full potential.

Display & Brightness

Here, you can change display brightness and choose how long your Solo will remain unlocked while not in use.

Languages

Click "Languages" to select your Solo's operating language.

Connections

Toggle the Wi-Fi "On/Off" switch to "On" and connect to a Wi-Fi network to switch to a Wi-Fi connection. Switch the Wi-Fi to "Off" to re-connect to a mobile network via the unlimited data SIM card.

An internet connection is required for the Solo to process payments. For more information, including some troubleshooting tips, check out our guide on connecting your Solo to the internet.

Sales history

The Solo lets you view your past transactions and check transaction statuses. You can then choose to refund transactions directly from your Solo or send receipts. It also includes the option to filter transactions by date, time and amount to help you find exactly what you're looking for.

View my sales history

Tap the downward-pointing arrow at the top of the screen.

Select "Sales history".

Pick a transaction from the list to view transaction details and payout details.

Issue a refund

Choose the relevant transaction in your "Sales history".

Tap "Transaction successful" to view the transaction and associated options.

Tap "Refund" at the bottom of the screen.

Enter the refund amount and hit "Issue refund".

Confirm the refund by entering your SumUp password.

You'll see a confirmation screen, simply tap the arrow button or the "x" in the top corner to return to the selected transaction.

Tipping

You can enable Smart Tipping under the "Tipping" section by simply switching the toggle to "On". Smart Tipping offers dynamic tipping options for customers to choose from based on the transaction amount or the option to add a custom tip amount.

Find out more about tipping with SumUp here.

Charging

You can charge your Solo using the included 2.0 USB type C cable or charging cradle. The Solo can continue to accept transactions while charging.

Turn off my Solo

To turn your Solo off, hold the power button for a couple of seconds until the option to shut down pops up on the screen. Tap "Shut down" again to confirm.
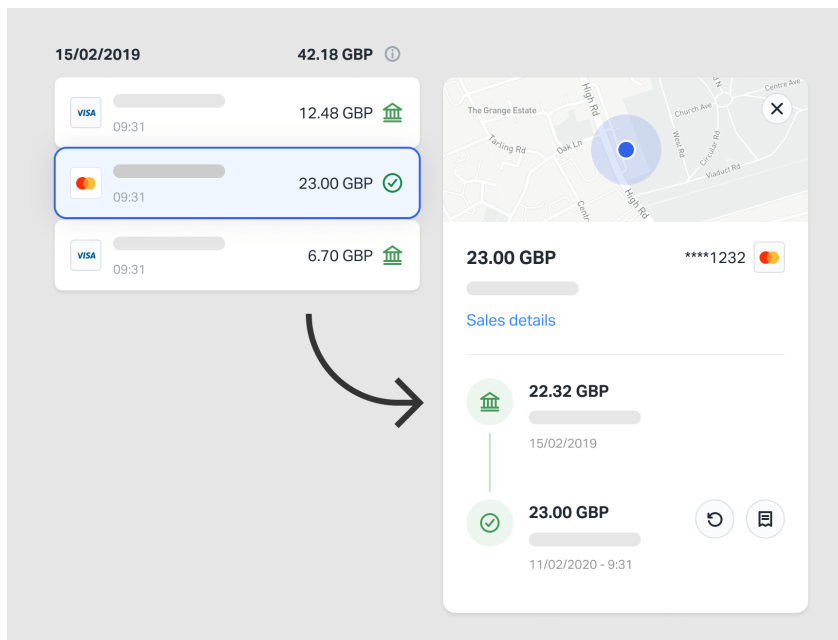
Sales history

Your sales history contains a basic breakdown of all the payments you've accepted using SumUp.

Access sales history

You can quickly and easily check the status of past transactions with your sales history on your SumUp profile, the app or either the SumUp 3G or Solo. Here's how you can find it.
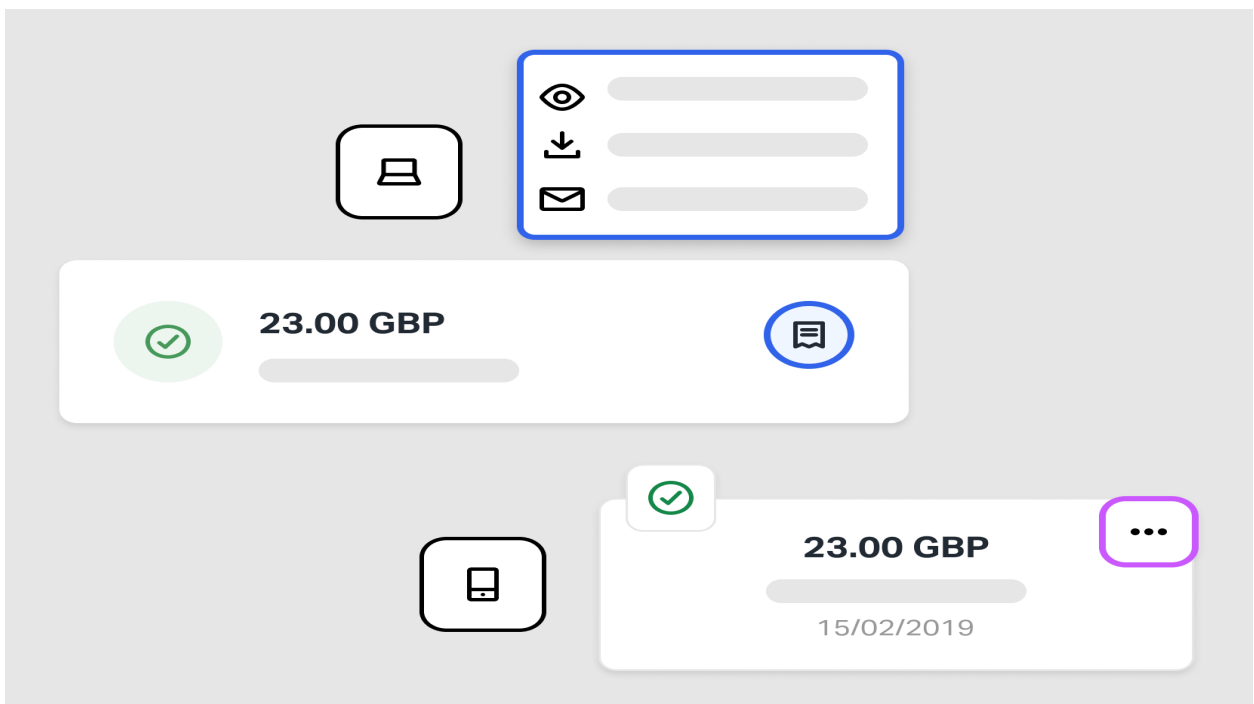
Access my sales history on the SumUp profile

1. On your <u>SumUp profile</u>, select the "Home" tab in the left-hand panel.
2. Choose "Sales" to view your sales history.
3. Click on an individual transaction to view its details. A popup on the right will also display the transaction and payout timeline, as well as all items sold.

To search for individual transactions you can use the filter options or enter the transaction code in the search bar at the top right corner.

Access my sales history on the SumUp App

1. In the SumUp App, tap on the "Sales" tab at the bottom of the
   screen.
2. Then either scroll through your list to find the relevant transaction or
   use the search function to find it.

Access my sales history on the 3G Card Reader

1. Press the arrow keys up or down on your SumUp 3G to enter the menu.
2. Use the arrow keys to go to "Transaction history" and press the green tick.
3. You'll then be able to view your transactions, beginning with the most recent.
4. Select an individual transaction by scrolling to it and pressing the green tick.

Be aware your 3G Reader can only show transactions processed using the 3G. Check the app or your SumUp profile for a full list.

Access my sales history with the Solo

1. Log in to your Solo and tap or drag down the arrow at the top of the screen.
2. Hit "Sales history".
3. Select the relevant transaction by tapping on it.

How to find a specific transaction

You can search for a specific transaction with the filter options. Either type the specific transaction ID or item description into the search bar on your SumUp profile or app or make use of the following filter options on your profile.

| Payment type ⌄ | Time period ⌄ | ⬇ **My reports** |

Payment type:
- ☐ Card
- ☐ Cash

Clear   **Apply**

Time period:
- ○ Today
- ○ Last week
- ○ Last month
- ○ Six months
- ○ Custom...

Status ⌄
- ☐ Successful
- ☐ Failed
- ☐ Refund
- ☐ Chargeback

Clear   **Apply**

Employees ⌄
- ☐ Employee one
- ☐ Employee two

Clear   **Apply**

Time period

Your profile lets you see every transaction you've made since joining SumUp. Use the date filter to specify a time period and make it easier to find one transaction in particular.

Either select a preset time filter such as last week or last month or create a custom time period.

Payment type

You can filter your transactions according to whether payment was by card or cash.

Status

Filter transactions based on their current status to see what transactions have been successful, which have failed and whether they've been paid out, refunded or charged back.

Check out our guide for [more information on transaction statuses](#).

Employees

[Create employee profiles](#) and then keep track of individual employee sales histories by simply entering their name or email address in the relevant box.

Note: Employee profiles must be enabled for this filter option to appear.

My Reports

This page gives you an overview of all the reports available to you as a merchant, so you can get the most out of SumUp and take your business even further.

How to download my reports

1. On your <u>SumUp profile</u>, click on the "Home" tab in the left-hand panel.
2. Then choose "All Reports".
3. Select a timeframe using the blue date button in the top left corner.
4. Select the report you wish to download.

What reports are available?

Sales Reports

The Sales Report gives you a detailed list of your sales activity over any given period of time.

Used in combination with the <u>Items section</u>, this report will give you an overview of all your cash and card transactions, showing you what and how many items you sold and what tax category they fall under.

Payout Reports

The Payout Report is a list of all the card transactions that have already been paid out to you–including the date of the payout and the associated transaction fees.

Check out our article on Payout Reports for more information.

Monthly transaction fee invoices

The transaction fee invoice provides you with the total amount of your transaction fees for the respective month. You don't need to pay this amount as it has already been deducted from your payouts. As a financial service, our fees are exempt from VAT.

Note: We'll send you the fee invoice via email along with every monthly Payout Report.

Transaction Reports

The Transaction Report is an overview of all your transactions, including card payments, cash payments, and refunds.

You can view the payment method, the status of a transaction, the customer's card type, and a transaction description if it was added.

Revenue Reports

The Revenue Report provides you with a full overview of all the goods or services you've sold over a period of time. SumUp's Revenue Report gives you a breakdown of business activity sorted by category, payment method, and employees.

Report your taxes easily by downloading your report as a PDF and sending it to all the relevant financial authorities.