HELLO! WELCOME TO

UPAY

LET US SHOW YOU AROUND!

Upay User Guide

Welcome to Upay!

Upay is a sophisticated online payment processing and account management portal designed to be used in environment such as, Business, University, School etc.

This guide will help you with the Upay website and the Upay apps.

CONTENTS

REGISTRATION

To register for an account go to **WWW.UPAYCHILLI.COM** on any of the following internet browsers IE9+, Chrome, Firefox or Safari or download our free Upay app from the App Store, Google Play or the Windows Store.

Click on the 'Register my Upay Account' button and enter your Company's Affiliate ID. Then enter your Card ID or User ID.

If you do not know your Affiliate ID or User ID/Card ID, please contact a member of the catering or facilities team on-site.

You will then be prompted to confirm your details. Please confirm and continue to complete the registration form. You will need to verify your account and will need to have access to either your email or your mobile number for this verification step. Once you have received your verification code, please enter it in to the designated box and click 'continue'. If you have not received this email, please check your spam folder or click resend 'email'.

LOGIN

Once registered, login to Upay by going to **WWW.UPAYCHILLI.COM** and entering your username & password.

Your username will be the email address you have registered with.

WELCOME TO UPAYCHILLI

LOGIN

Email Address

Password

LOGIN ▶

FORGOTTEN PASSWORD 🔒

☐ REMEMBER MY USERNAME
☐ KEEP ME LOGGED IN

REGISTER MY UPAYCHILLI ACCOUNT ▶

REGISTER FOR A VISITOR ACCOUNT ▶

GUEST TOP-UP SOMEONE ELSES ACCOUNT ▶

HOME

The Home screen allows you to see information about your account quickly. You can configure the widgets on this screen to display the information that you want to see. As part of our latest release you can choose to display any of the following:

- My Balances
- My Loyalty Points
- Last Statement Rows
- My Rewards
- Pay Now QR Code
- My Wallet
- My Most Purchased Items
- Random Promotion

The widgets above will only show if you have access to these features at your site. If they don't appear you don't yet have access.

To navigate between the widgets on the mobile site or on the app just swipe left or right. If you want to configure them you can do so via the my app icon or via the settings menu.

We will be adding more widgets as time goes on so that you can tailor the Upay app to your needs.

All functionality is accessible from the website or via the Upay app.

DESKTOP MENU

On the desktop site you can access your Upay menu from the three lines at the top right hand side of the screen as displayed below.

There may also be quick links in the header. Displayed above are Promotions, Documents and Notifications.

We will discuss these modules further in the guide.

MOBILE MENU

The mobile menu is much more intuitive and allows you to see most of your account features on the screen you are working from.

Like in the desktop menu you may have quick links to some modules in the header bar like the ones displayed.
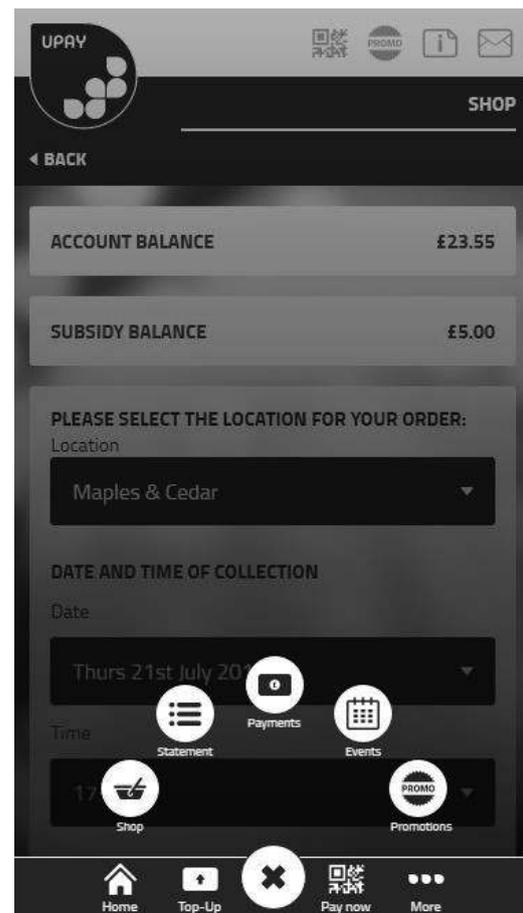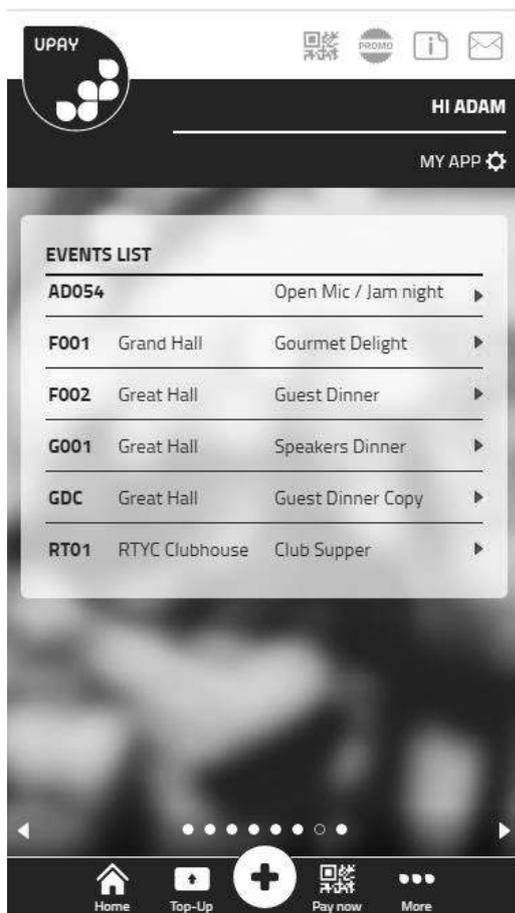
You will also have key features in the footer bar. The + button pops up your feature menu where you can access features like Promotions etc.

The more button takes you to your background menu where you can configure your account and logout.

LOYALTY

Some sites allow you to accumulate loyalty points when you make purchases at the till or in SHOP.

Your loyalty points accumulation is visible on the Home screen. You will be shown a loyalty points total and its corresponding value. You will be able to redeem your loyalty points at the till or on the online SHOP when making a purchase.
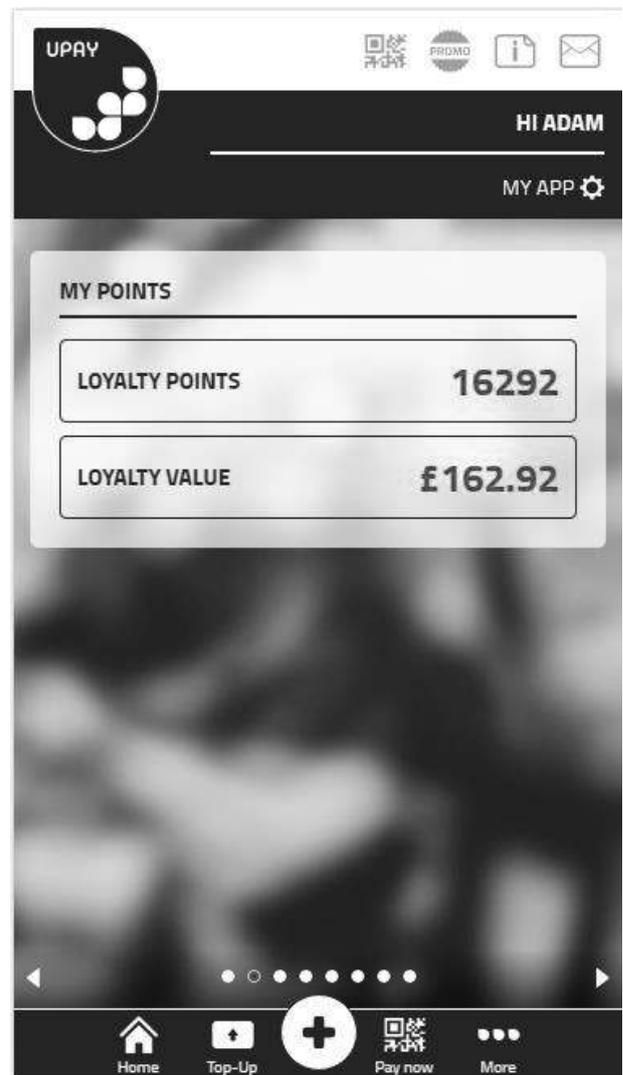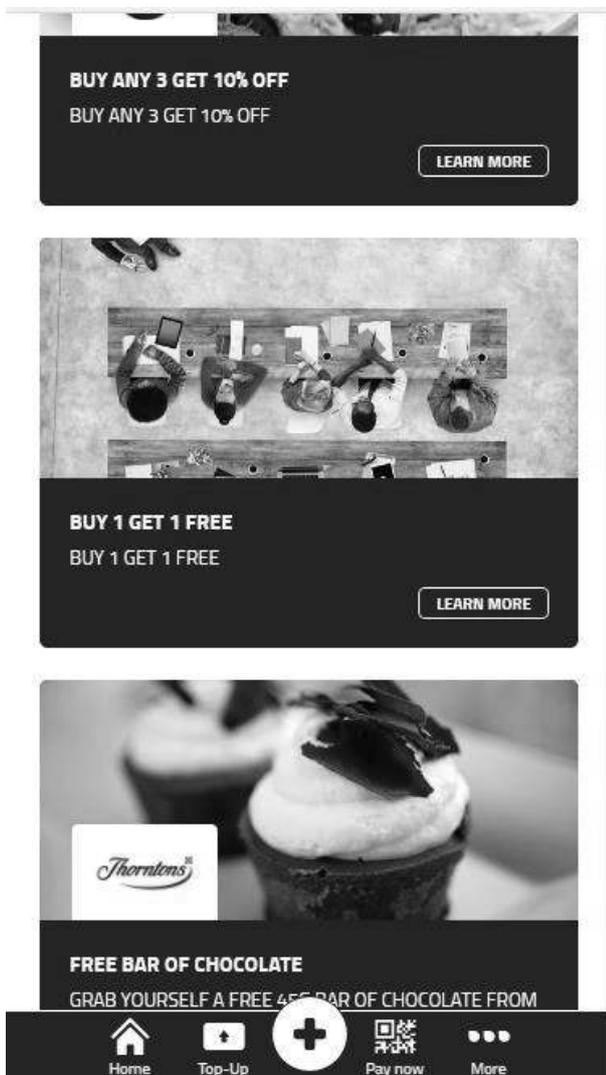
PROMOTIONS & MULTIBUYS

Access the promotions module to see what offers your site has.

Just click on the Promotions button to see what is available at your site or check out the Random Promotion widget for the latest deals.

PROMOTIONS

BUY 3 GET THE MOST EXPENSIVE FREE

BUY 3 GET THE MOST EXPENSIVE FREE

LEARN MORE

FREE BOTTLE OF WATER

HEAD DOWN TO UNIWARE AND GRAB YOUR FREE BOTTLE OF WATER!

LEARN MORE

COFFEE PROMOTION

LOYALTY ACC

LEARN MORE

MULTIBUYS OOOOOO

BUY 2 GET CHEAPEST HALF PRICE

BUY 2 GET CHEAPEST HALF PRICE

LEARN MORE

BUY ANY 3 GET £1 OFF

BUY ANY 3 GET £1 OFF

LEARN MORE

BUY ANY 3 GET £2 OFF

BUY ANY 3 GET £2 OFF

LEARN MORE

**BUY ANY 3 GET 10% OFF**

BUY ANY 3 GET 10% OFF

LEARN MORE

BUY 1 GET 1 FREE

BUY 1 GET 1 FREE

LEARN MORE

11

NOTIFICATIONS

We will ping you helpful notifications about low balances and other system related messages. These will show up in the header. When you click the notifications icon your unread messages will drop down. Click the view all messages to see all messages that have been sent.
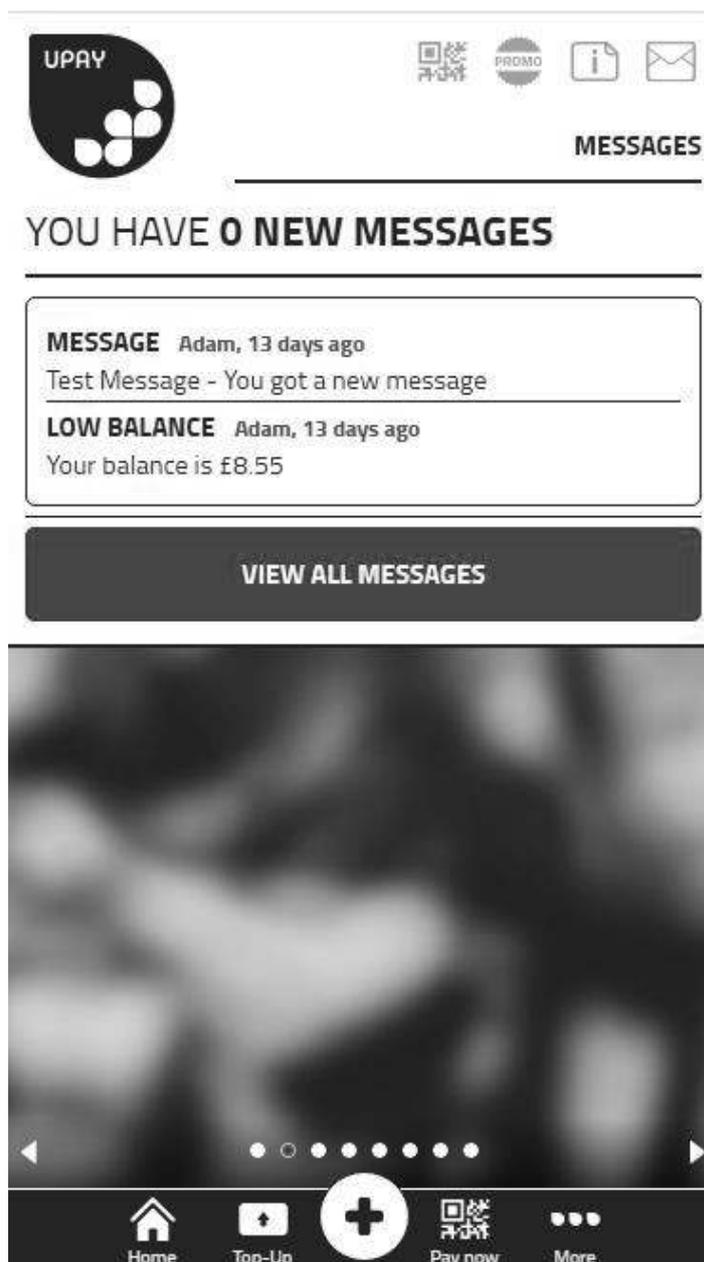
SWITCH ACCOUNTS

If you have an **SWITCH ACCOUNTS** button, you will be presented with all the Upay accounts that you currently have.

Upay is used in Education, Business & Industry and in events so it possible to have more than one account. Just choose which one you want to work with from the Account List screen.

The Account List is accessible from the more menu on the app and on the mobile site.

Uniware

Beth Leach, £3.74 ▶

Beth Test, £14.50 ▶

Beth Leach, £0.00 ▶

Beth Open, £14.00 ▶

Beth Leach, £0.00 ▶

STATEMENTS

You can view itemised statements of all expenditure to keep your spending on track and monitor your transactional history. You will also be able to see when you have added funds in to your account.

View the full length statement from the main menu.

On the statements screen, you will see a set of buttons on the right hand side. Choose whether you would like to print or download to excel. You can also choose various statement view durations. The standard statement view is set to the last 30 days, however you are able to review your purchases monthly, by month to date, or via Annual Summary.

The final button lets you expand the statement to show all of the product purchase details.

For users that have multiple purse types like Cashless, Free Spend, Dining Purse & Loyalty points etc. you will see that your statement is laid out in these categories for easier viewing.

ACCOUNT TYPE: CASHLESS

				START BALANCE	MONEY IN	MONEY OUT	END BALANCE
TOTALS				£724.36	£0.00	£35.53	**£688.83**
DATE	TIME	TYPE	LOCATION			TOTAL	BALANCE
27/08/2015	14:40	Sale	UPay.co.uk			£ 5.00	£ 688.83
27/08/2015	12:50	Sale	UPay.co.uk			£ 5.00	£ 693.83
27/08/2015	12:47	Sale	UPay.co.uk			£ 5.00	£ 698.83
27/08/2015	12:03	Sale	UPay.co.uk			£ 5.00	£ 703.83
20/08/2015	11:06	Sale	Online Ordering Web site			£ 0.53	£ 708.83
17/08/2015	13:21	Sale	UPay.co.uk			£ 10.00	£ 709.36
17/08/2015	13:21	Sale	UPay.co.uk			£ 5.00	£ 719.36

PRINT	🖨
DOWNLOAD (EXCEL)	⬇
LAST 30 DAYS	▾
SHOW PRODUCT DETAILS	⊡

ACCOUNT TYPE: FREE SPEND

	MONEY IN	MONEY OUT
TOTALS	£0.00	£0.00

ACCOUNT TYPE: DINING PURSE

	START BALANCE	MONEY IN	MONEY OUT	END BALANCE

Download on the App Store

GET IT ON Google play

SHOP

SHOP is an online ordering system for deli ordering, hospitality ordering and retail purchases. If shop is enabled on your site, go to the SHOP in the menu to get started.

You can use your cashless purse, debit/ credit card or budget account to pay for SHOP purchases. You can accumulate loyalty points through purchases in SHOP but can only redeem them at the checkout.

PAYMENTS

This is an area in Upay where you can make multiple or single payments to a specific event, membership or fee.

You can access payments via the quick main menu on desktop and feature menu on your mobile.

EVENTS

Events is an area where you can make a reservation for an event or a function.

If this is enabled on your Upay account, you will be able to access this from the main menu on desktop and feature menu on mobile.

EVENTS

Code	Description	Location	
AD054	Open Mic / Jam night		▶
F001	Gourmet Delight	Grand Hall	▶
F002	Guest Dinner	Great Hall	▶
G001	Speakers Dinner	Great Hall	▶
GDC	Guest Dinner Copy	Great Hall	▶
RT01	Club Supper	RTYC Clubhouse	▶

VIEW MY ACTIVE BOOKINGS ▶   BOOKINGS STATEMENT ▶

PAY AS YOU GO TOP-UP

Pay as you go Top-Up allows you to top-up your account in a manual ad-hoc way. If you click on PAYG Top-Up, you can choose how much you want to top-up or enter another value.

Pay as you go Top-Up is a great and easy way to top up whilst on the move, giving you complete control over when and where you want to add money into your account.

UPAY

BETH LEACH ▾

PAY AS YOU GO

Please select the amount you would like to Top-up your account by

| £10.00 | £20.00 | £30.00 | £40.00 |

| £50.00 | OTHER |

UPAY

18

AUTO TOP-UP

This is an optional feature that tops-up your account when you hit a pre-set minimum amount, so that you never run out of money on your account.

To sign up for Auto Top-Ups you, click the 'Auto Top-Up option from the Top-Up menu. Then choose to Set Auto Top-Up. You will then be asked to set a minimum Auto Top-up trigger amount.

Once you have set your trigger amount, you will then need to set up your revalue amount. This is the amount that your account is topped-up by. Please choose from the amounts listed or enter a different value via the 'Other' button.

Select an Auto Top-up trigger amount

£4.00	£5.00	£8.00	£10.00
£15.00	£20.00	£25.00	OTHER

QUICK TOP-UP

This is an alternative option to Auto Top-Ups. When your account reaches a pre-set minimum amount we will email you to let you know. This email will contain a link that will take you straight in to the Top-Up process. If you have selected a card already, all you need to do is enter your card's security code and confirm. If not, you can choose from a list of your pre-selected cards or enter some new card details.

The minimum trigger amounts and the revalue amounts follow the same structure as Auto Top-Ups. When signing up for Quick Top-Up, you will need to set your minimum trigger amount. Please choose from one of the options presented or enter a different value via the 'Other' button.

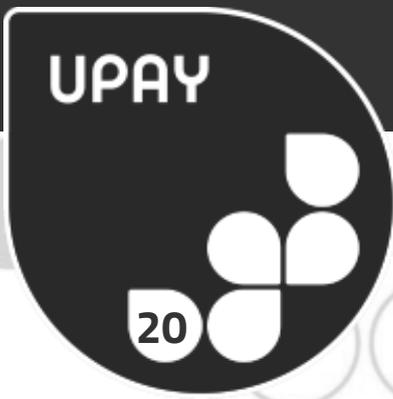Select a Quick Top-Up trigger amount

| £4.00 | £5.00 | £8.00 | £10.00 |
| £15.00 | £20.00 | £25.00 | OTHER |

PAYROLL TOP-UP

Some sites allow their staff to top-up via their payroll. In this process a user tops-up and the amount is deducted from their payroll at the end of the month.

GUEST TOP-UP

Guest Top-Ups allow your friends and family to top-up your account. You can access a guest top-up page from within your Upay account to invite others to do this via both email or SMS with a code that will expire.

Your friends and family can access guest Top-Up via the home screen at any time. They just need to click on the Guest Pay button to start and have your Client Affiliate ID & User ID to hand.

UPAY

GUEST TOP-UP

The UpayChilli guest Top-up feature allows you to invite a friend or family member to Top-up your account.

This feature will send a link via e-mail that will give your invitee access to the Top-up feature but not the rest of your account.

SEND E-MAIL

MY WALLET

You are able to save your data securely with Upay allowing you to benefit from a quicker process in topping up, both with PAYG and Auto Top-Up .

If you wish to add a top-up card, hover over the 'Account' tab and click on 'My Top-Up Cards'.

You will be able to see limited information of any card details that are saved and can add or remove cards accordingly.

Upay provides a safe service for topping up your cashless account and is fully compliant with PCI security standards for processing debit and credit cards.

Our strict data requirements are frequently monitored and tested and include rigorous security measures, including encrypted data transmissions and unique user ID.
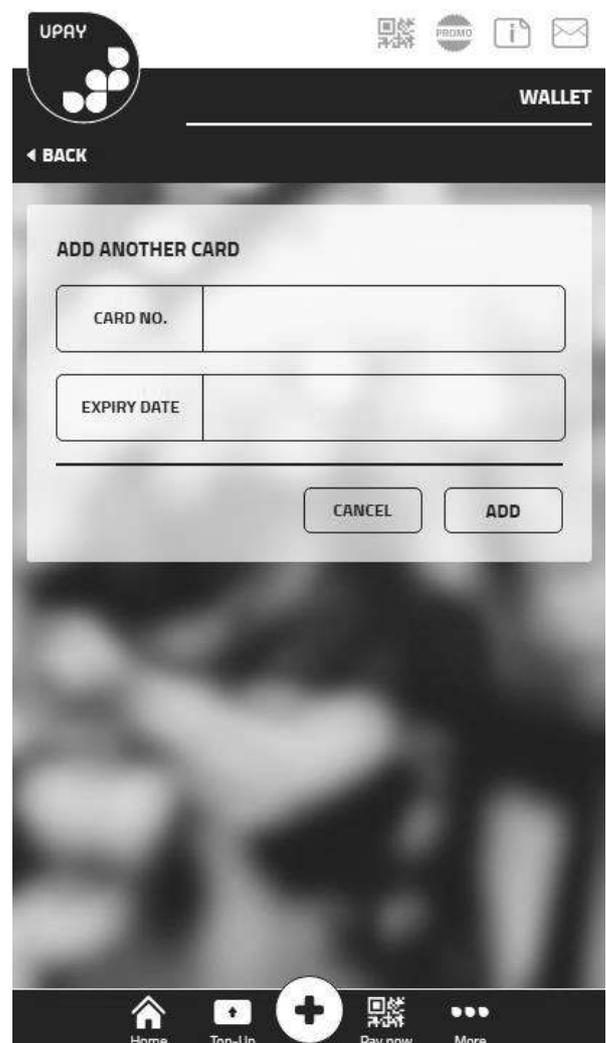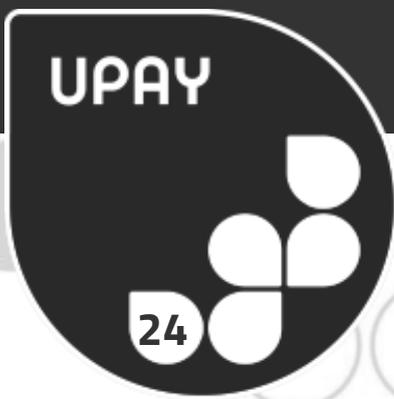
DOCUMENTS

Here you will find various documents put in place by the caterers, retailers or facilities teams that provide Upay to you. These could include

- Latest Offers
- Restaurant & Bar menus
- Company Terms & Conditions
- Event Information
- Other Useful Information

So be sure to keep checking back from time to time!

UPAY

24

SETTINGS

Manage your account quickly and easily. Here you can tailor your account by setting your email settings and your spend limit settings.

- Email Receipts
- Email Statements

- Set a Daily Spend Limit
- Set a weekly Spend Limit
- Set other purses Spend Limits

- Change Password
- Change Email
- Lost/ Stolen Device
- Close Account

SECURITY

Upay takes the privacy of your personal information and your data security very seriously. We follow payment industry standards to ensure your data and funds are safe.

Upay is a service created by Uniware Systems Ltd. Please click below to review our Data Protection Policy.

In addition, Upay works with MasterCard SecureCode and verified by Visa for peace of mind when using your credit/debit card online.

SETTINGS

Account

Email Settings ▸

Spend Limits ▸

My Details ▸

Security

Change Password ▸

Lost / Stolen Device ▸

Lost / Stolen Card ▸

Change Email ▸

Close Account ▸

Data Protection Policy

To change your security details, secure your account or to report a lost/ stolen card please go to the Settings area.

To review our privacy policy, please go to the footer of the Chilli webpage and click on 'Privacy Policy'.
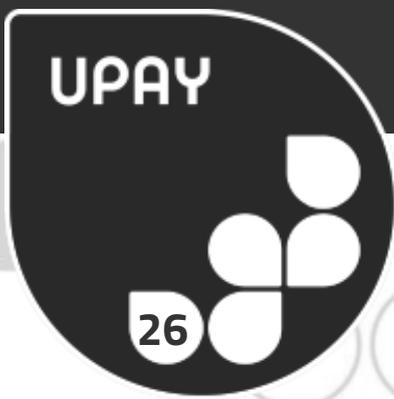
USER GUIDE & FAQS

If you need help at any time, you can either look for answers in our FAQs or in our User Guide on the 'User Guide and FAQ' tab in the menu.

Alternatively, contact us directly by clicking 'Help' in the footer of any Upay webpage.

We welcome your feedback on Upay. It is important to us that we continually strive to improve the end-user experience. Click on 'Feedback' in the web footer to send us your thoughts or write an app review!

ACCOUNT CLOSURE

If you need to close your account, just go to the menu and scroll click the close account button. If you have zero funds in your account, you will just need to confirm that you wish to complete this action. If you do have funds in your account, you will be able to refund your account balance to either a saved or a new card.

Please note that there may be refund limits set up by your company or institution. If this is the case and your account balance is above the accepted refund total, you will be notified within the account closure process.

UPAY

THANK YOU FROM

THE **UPAY** TEAM

Download on the App Store

GET IT ON Google play