HELLO!

WELCOME TO
UPAY

Upay User Guide 2020

Upay is a digital wallet that gives you payments, stamp cards, loyalty and more from the comfort of your mobile, tablet or computer.

Upay links to a variety of shops, restaurants, cafés and bars across the world. When you pay with your Upay account, businesses provide you with rewards on the Upay app.

With Upay, you can either pay with your phone's QR code or a linked site card which could be a staff card, loyalty card or a student card.

Upay also comes with other modules including event booking, online payments, online ordering for pick-up & delivery and voucher rewards. The modules you have access to are determined by the business that is using the Upay application for its customers.

REGISTRATION

To register for an account go to www.upay.co.uk or download or free Upay app from the App Store or Google Play.

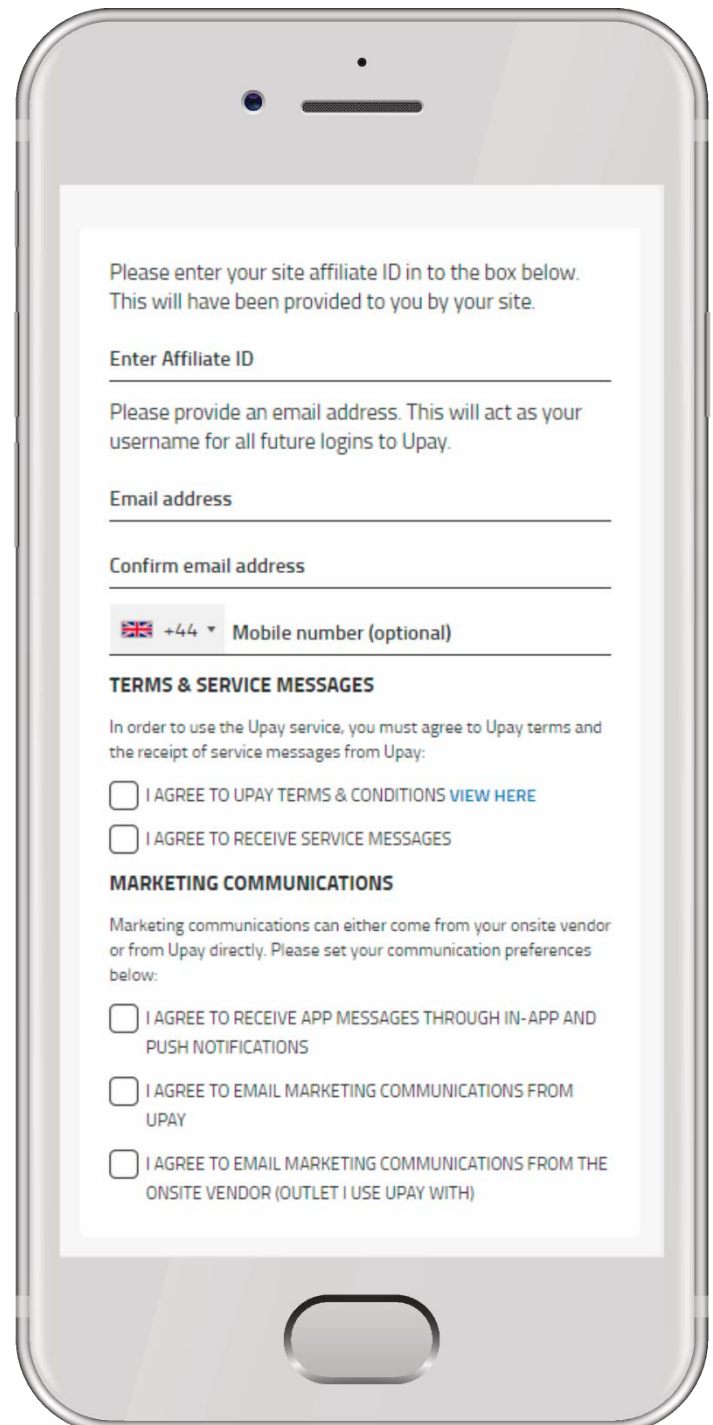Click the register button and complete the registration process.
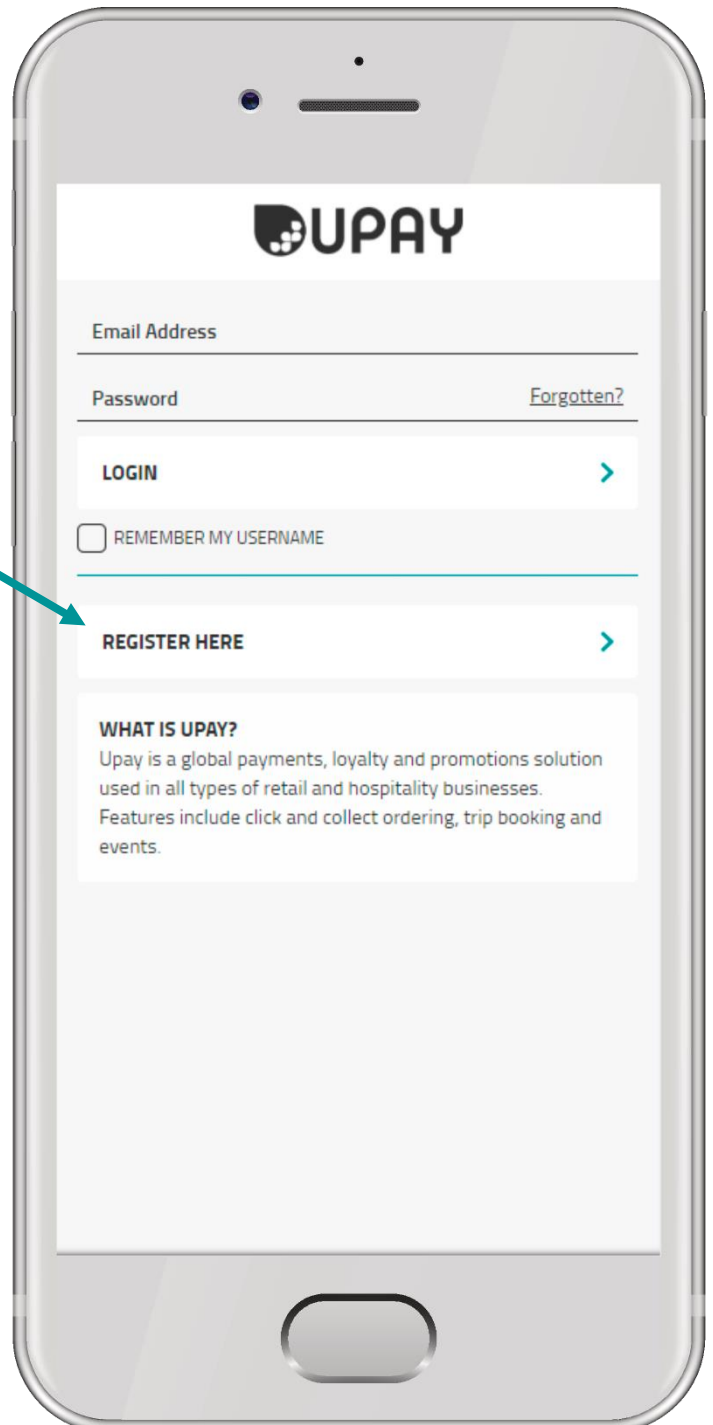
REGISTRATION

Enter your company's Affiliate ID and your email address.

Then review the Terms and Conditions and set your communication preferences.

Please note, in order to set up a Upay account, you must agree to the Terms and Conditions plus the acceptance of service messages. Marketing communications are entirely your preference but if you choose not to accept, you may miss out on important and exciting messages and deals!

On the next screen, you may be asked for your Card or User ID.

Please enter your site affiliate ID in to the box below. This will have been provided to you by your site.

Enter Affiliate ID

Please provide an email address. This will act as your username for all future logins to Upay.

Email address

Confirm email address

+44 ▾ Mobile number (optional)

TERMS & SERVICE MESSAGES

In order to use the Upay service, you must agree to Upay terms and the receipt of service messages from Upay:

☐ I AGREE TO UPAY TERMS & CONDITIONS VIEW HERE

☐ I AGREE TO RECEIVE SERVICE MESSAGES

MARKETING COMMUNICATIONS

Marketing communications can either come from your onsite vendor or from Upay directly. Please set your communication preferences below:

☐ I AGREE TO RECEIVE APP MESSAGES THROUGH IN-APP AND PUSH NOTIFICATIONS

☐ I AGREE TO EMAIL MARKETING COMMUNICATIONS FROM UPAY

☐ I AGREE TO EMAIL MARKETING COMMUNICATIONS FROM THE ONSITE VENDOR (OUTLET I USE UPAY WITH)

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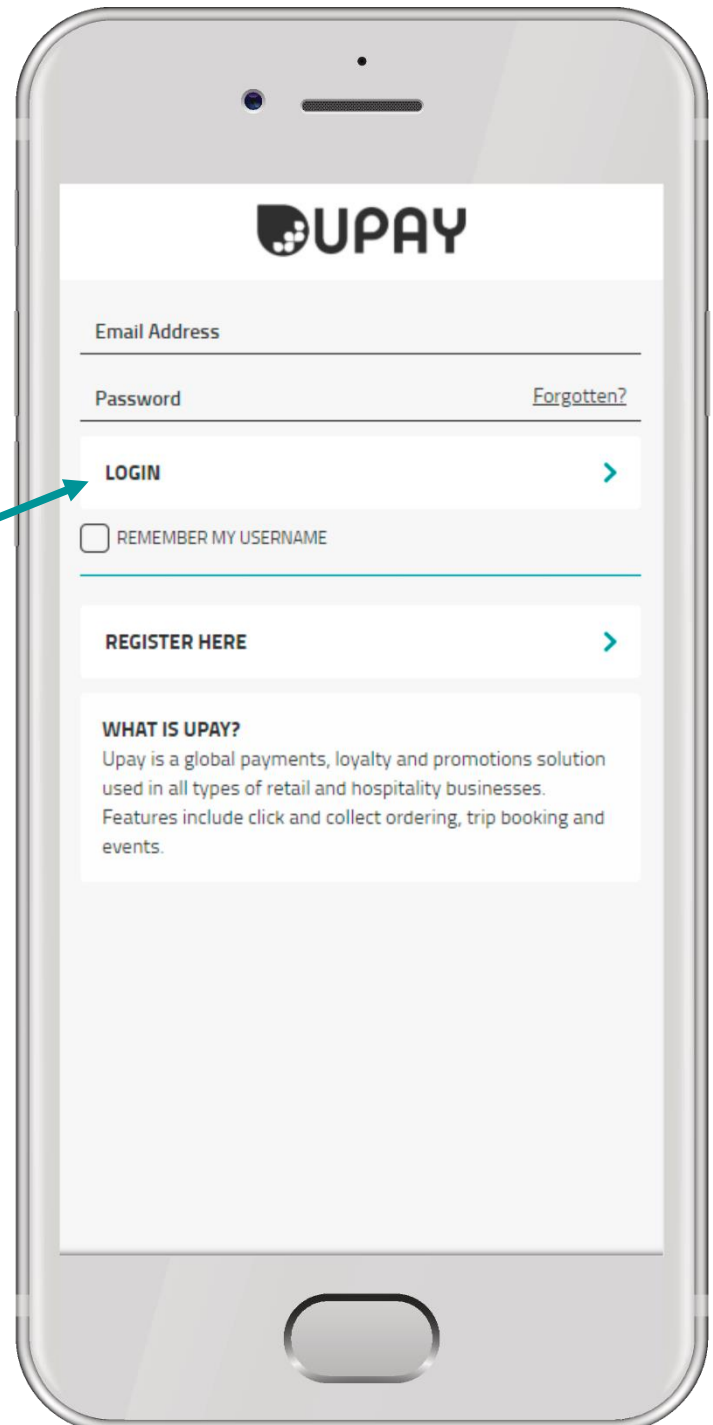
LOGIN

Once registered, login to Upay by going to www.upay.co.uk or by downloading the Upay app from the App Store or Google Play.

Click the login button and enter your username and password.

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

HOME

The Home screen allows you to see key information about your account.

Swipe the carousel for quick access to your balances, promotions, top-up, order ahead, events, documents, receipts and account settings.

Scroll down to view:
> Promotions
> Documents
> Events
> Online Payments
> Spend Activity

All features above will only show if you have access to these at your site.
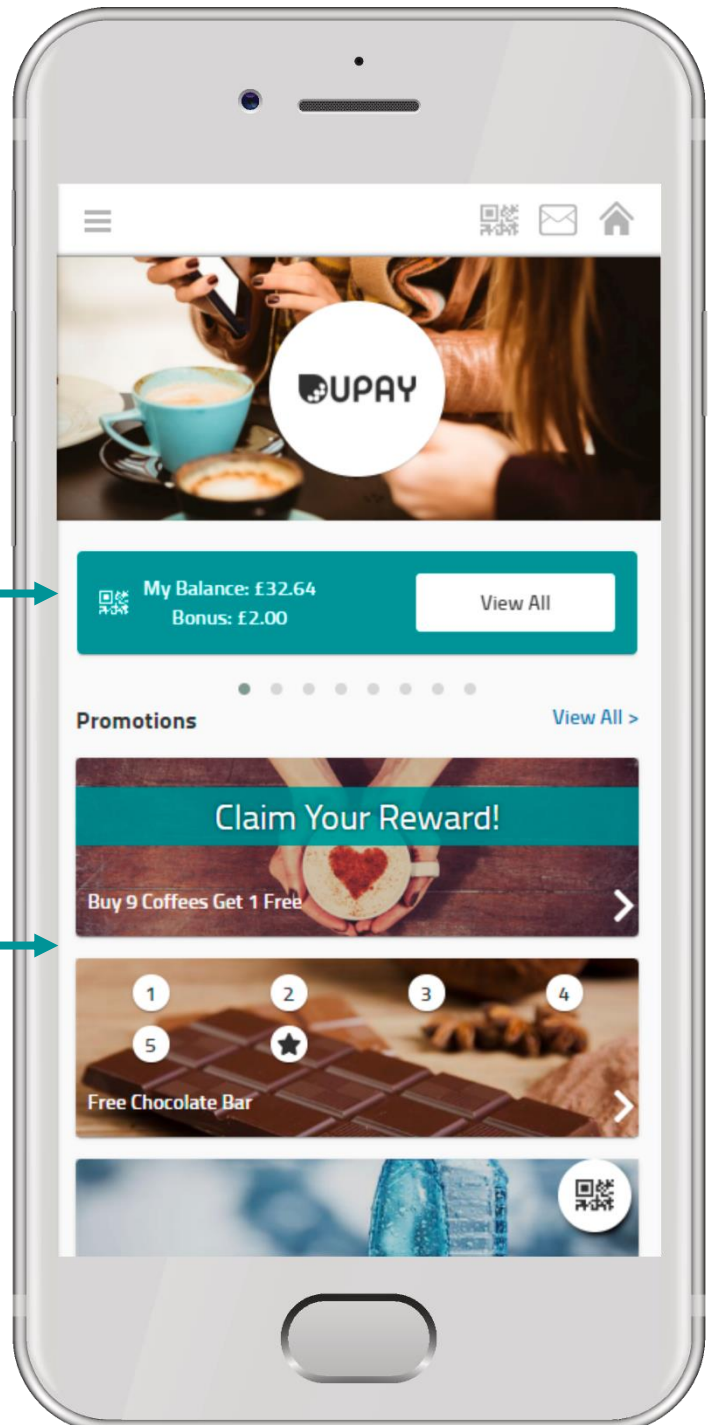
MOBILE MENU

The mobile menu is accessed from the 'burger' menu icon on the top left-hand side. Clicking this pulls out the menu drawer from the left-hand side of your mobile.
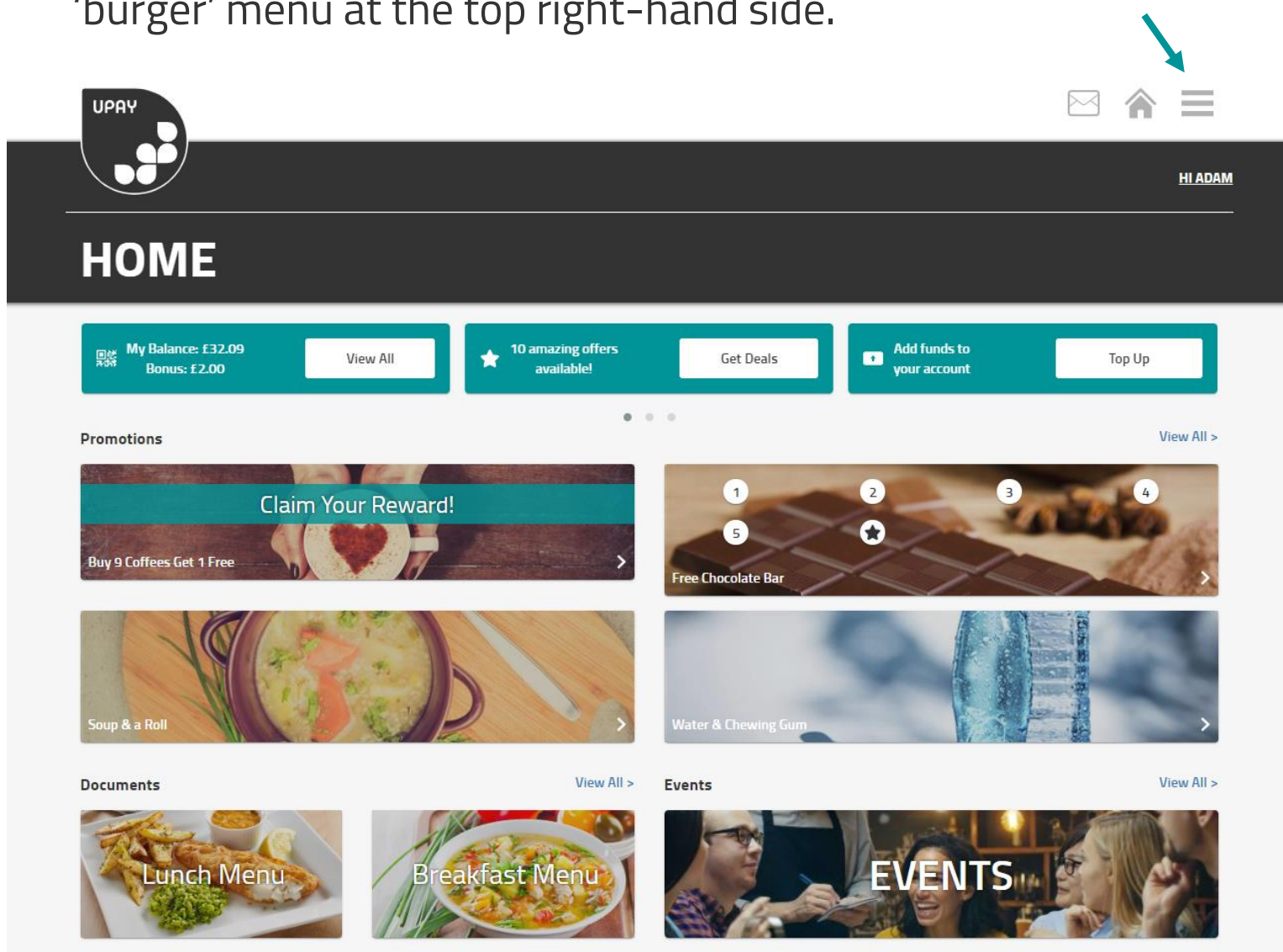
Access your available features from this menu.

This includes all key features that are shown on the home screen plus others including Help and Logout.
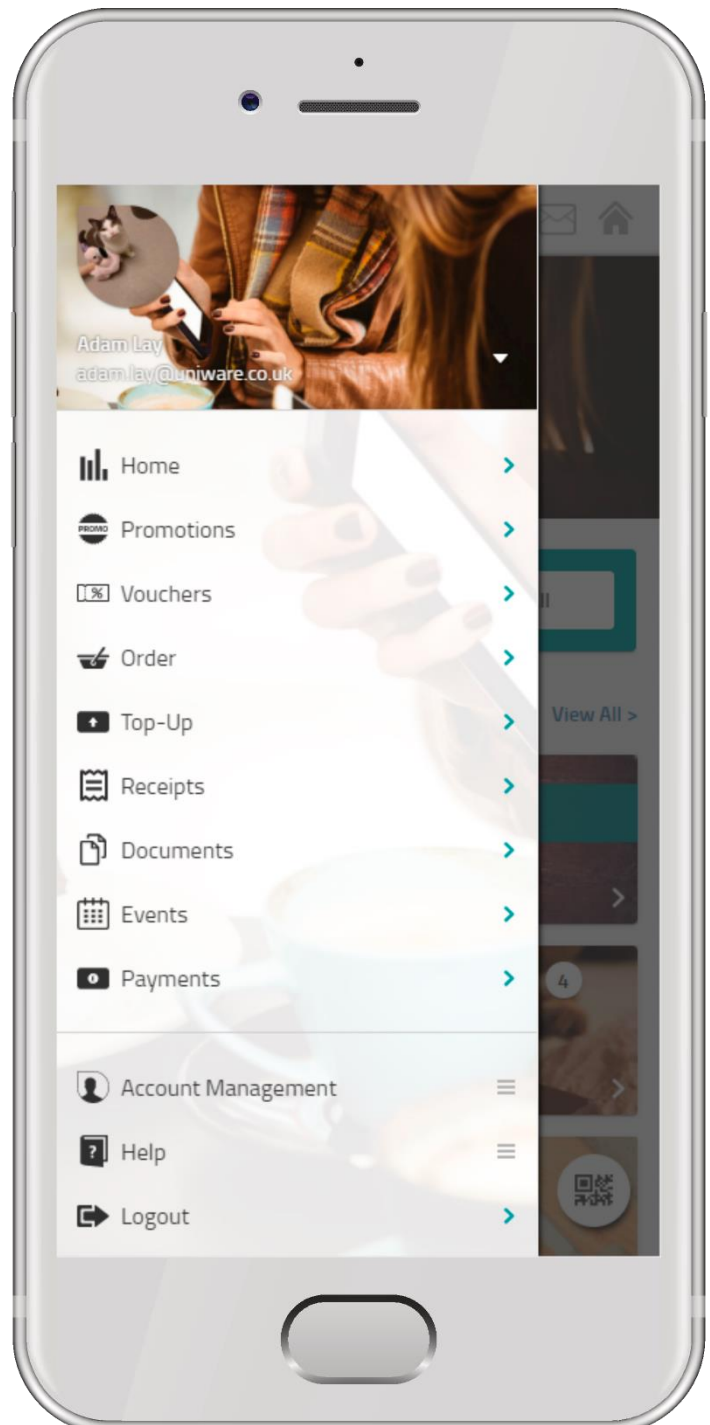
DESKTOP MENU

On the desktop site you can access the Upay menu from the 'burger' menu at the top right-hand side.

Key features can be access from the home screen and the menu. Click and drag the carousel with your mouse or click on the dots to slide through the features!

LOYALTY

Some sites allows you to accumulate loyalty points when you make purchases on site or via the Order module.

Your loyalty points accumulation is visible on the home screen via the balance carousel or 'Scan Now' QR code.

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 in the Order module when making a purchase.
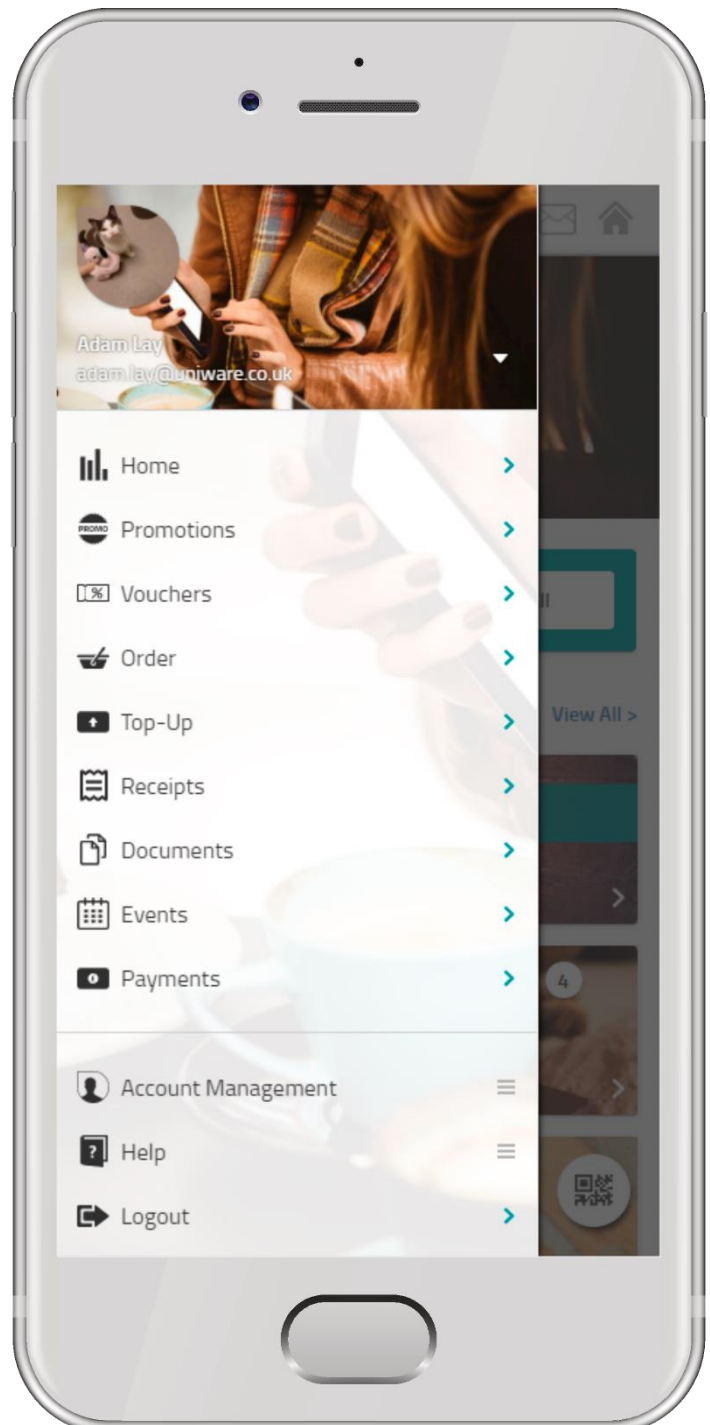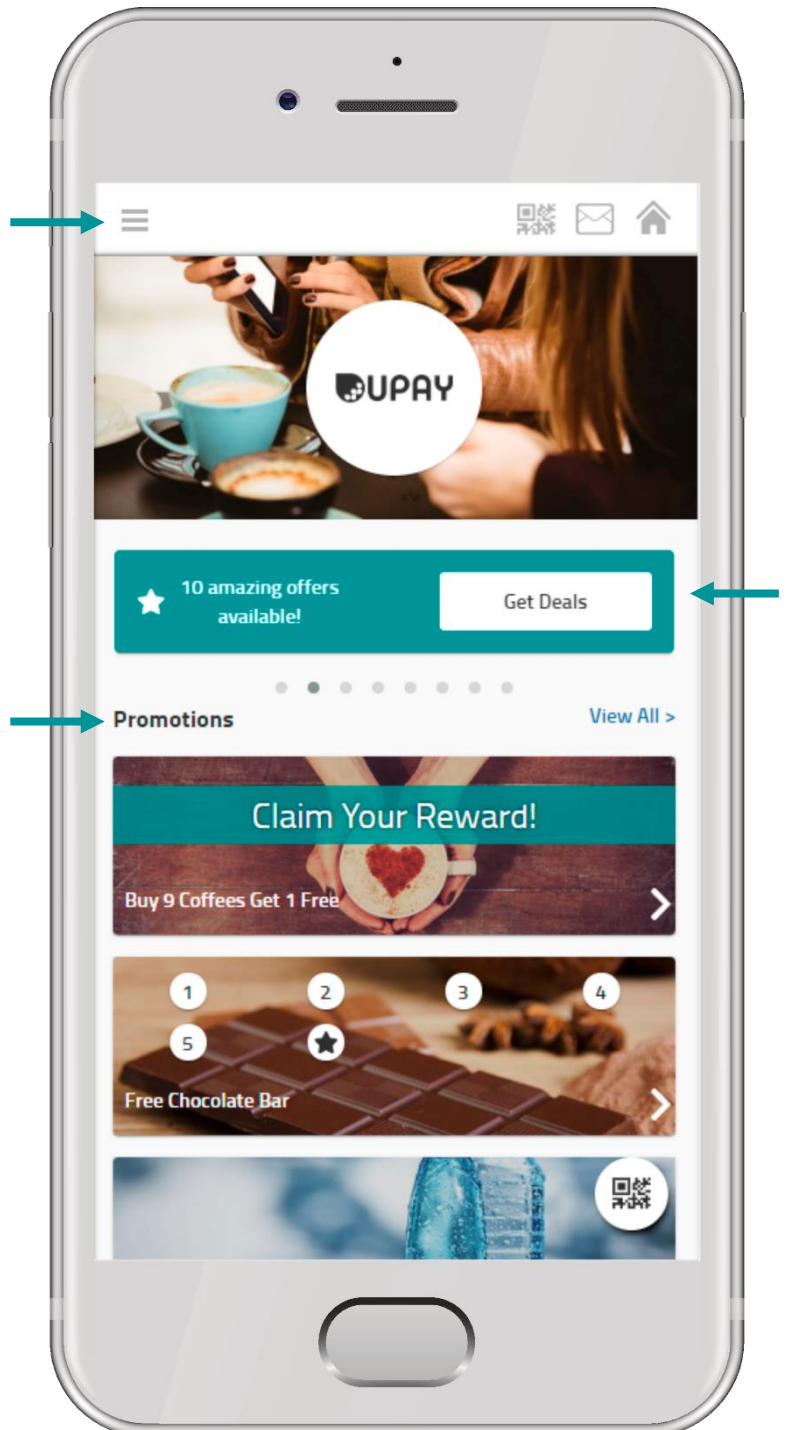
PROMOTIONS

Promotions can be set by your retailer for discounts, meal deals, stamp cards and more.

You can see available promotions in different areas of the app including:

> The carousel on the home screen, press 'Get Deals'

> Up to 4 promotions are listed on the home screen, click 'View All' to see the full list

> Via the main menu

REDEEMING PROMOTIONS

When purchasing qualifying products, promotions will be applied automatically.

For 'stamp card' promotions such as, 'Buy 9 Coffees Get 1 Free', you can track your accumulation every time you buy a qualifying product. A tick will cover the numbered circles in


When you reach the reward limit, the stamp card will change and notify you to claim your reward! The promotion will be applied next time your purchase a qualifying product.
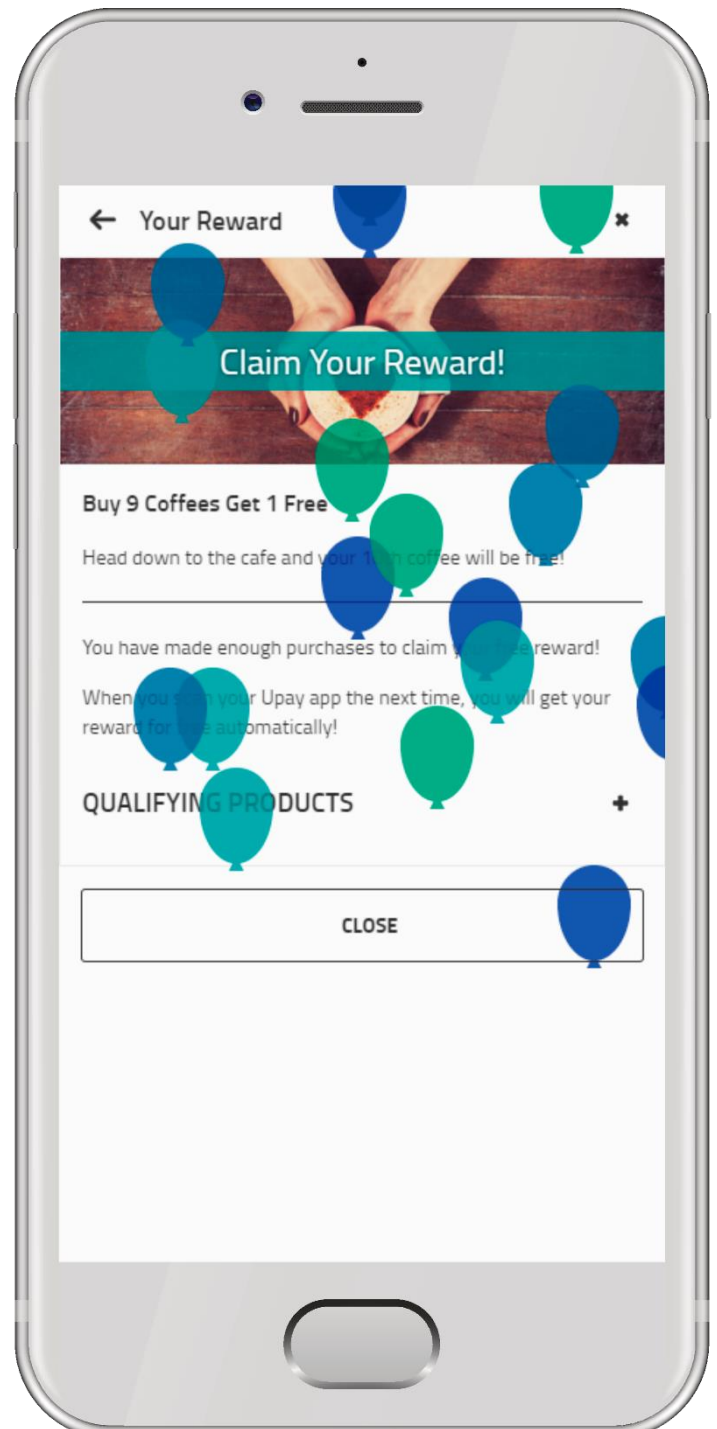
VOUCHERS

The voucher systems enables customers to purchase vouchers with a cashless balance or loyalty points or vouchers can be issued as a reward by the retailer.

Vouchers can then be redeemed by scanning the QR code in the Upay app, a printed receipt or a specially designed printed voucher issued by the retailer.
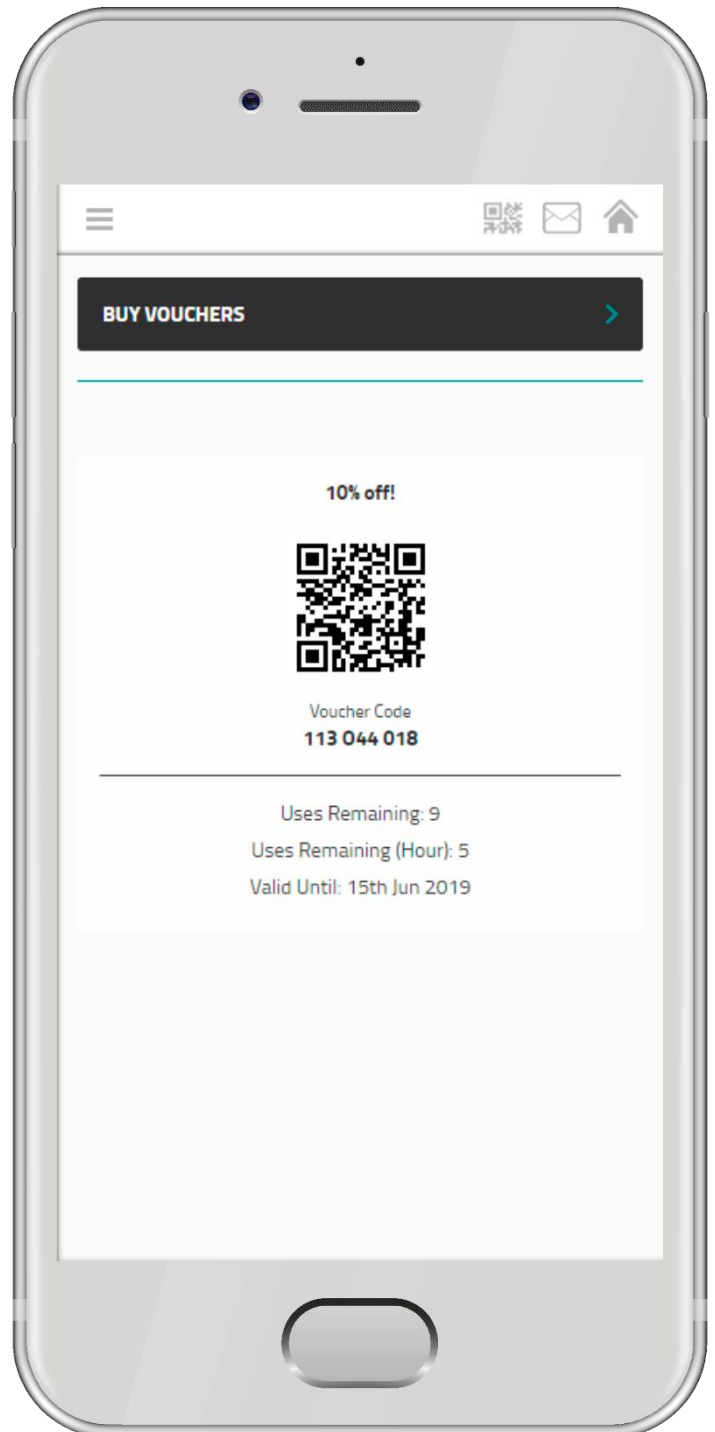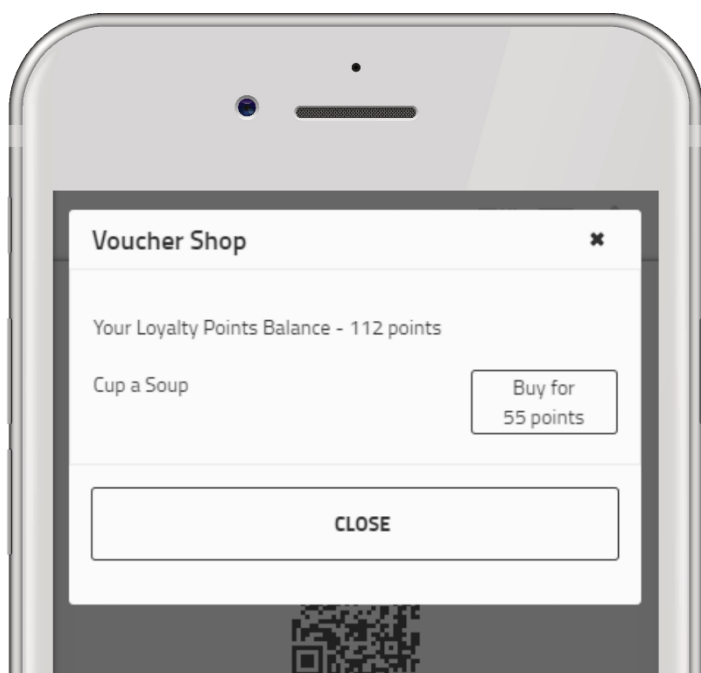
If vouchers are available, you can access this from the main menu.

NOTIFICATIONS

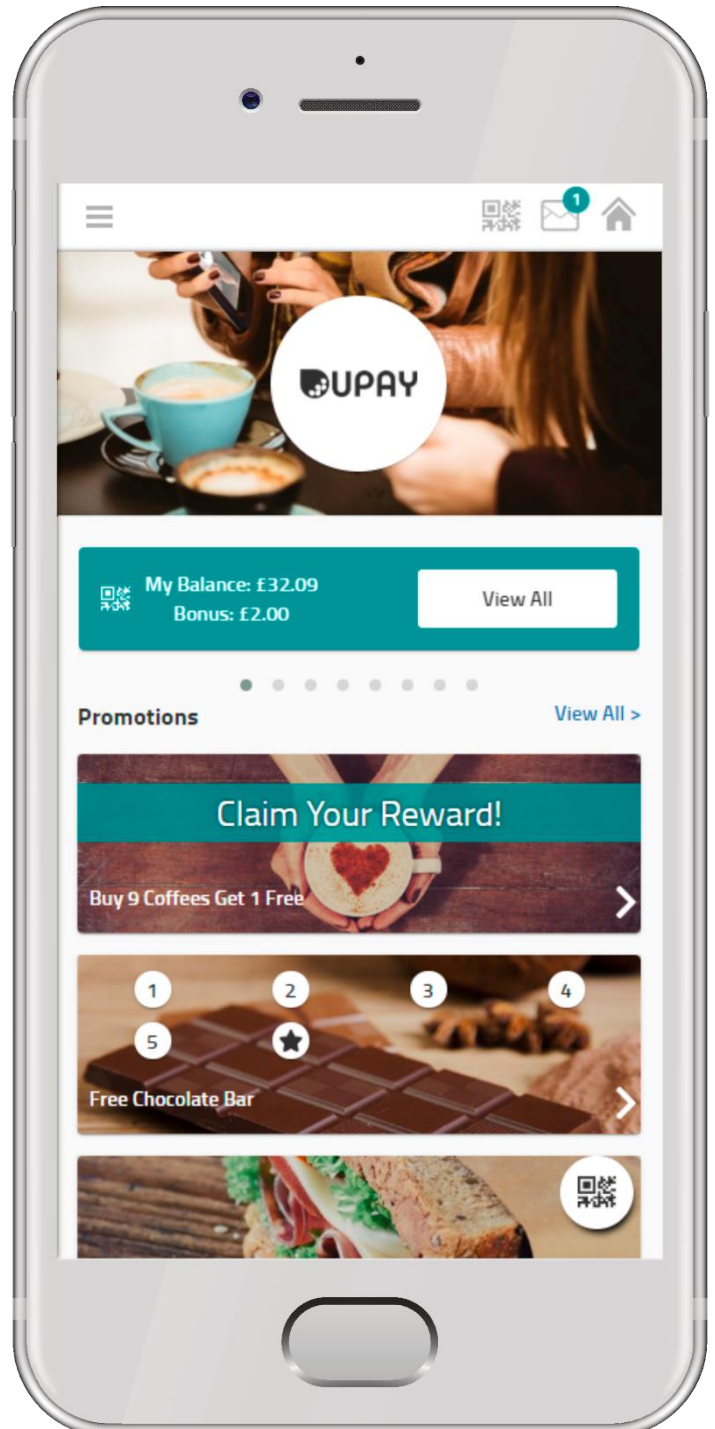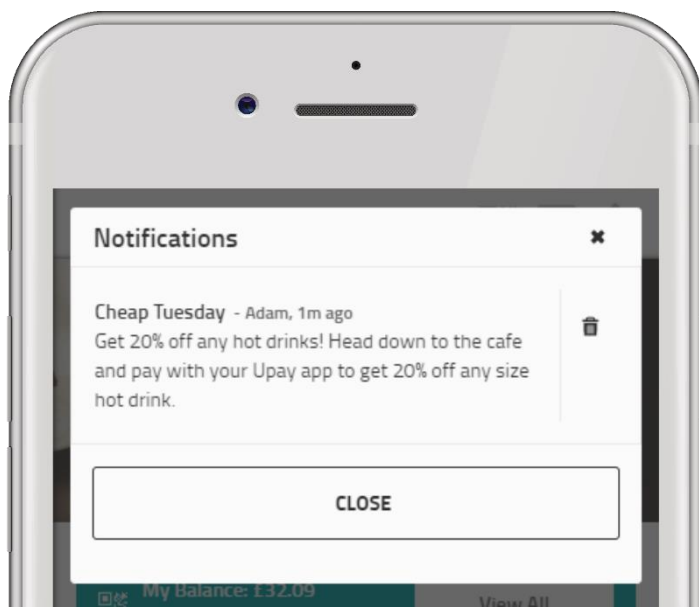Upay will ping you helpful notifications, such as low balances and other system related messages.

Your outlet(s) may also send you messages about latest news and offers.

Unread notifications will show in the header.

Marketing messages are optional, you can set your preferences in 'Account Management'.

If vouchers are available, you can access this from the main menu.

SWITCH ACCOUNTS

If you have multiple accounts, click the drop down of your displayed email address in the main menu. This will then ping down all the other accounts that are available. When you click one of these account options, this will switch your account.

You can switch back easily by following the same process.

Helpful tip: to make it easier to differentiate between accounts, you could use a different account image for each one!
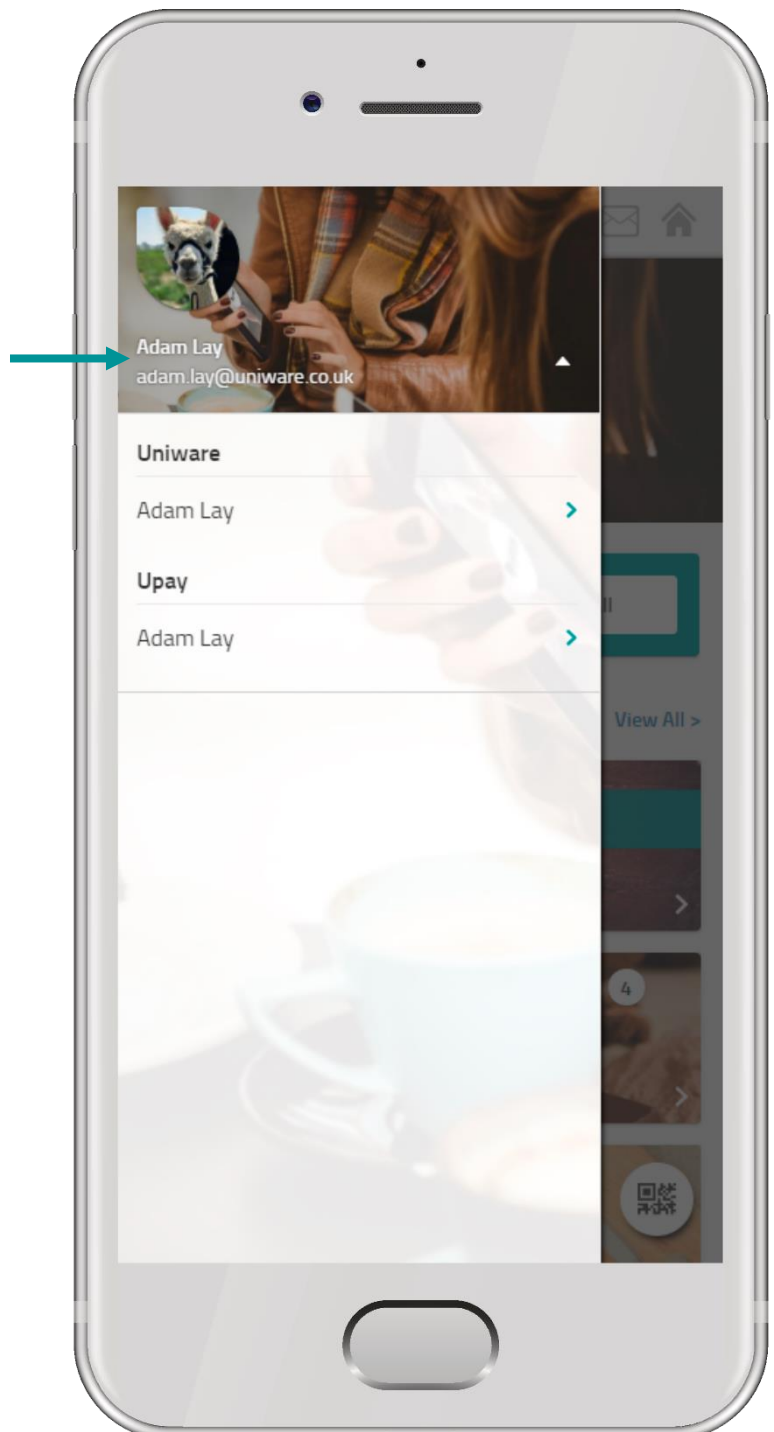
RECEIPTS

Your spending activity can be accessed from the bottom of the home page or via the main menu under 'Receipts'.

Click on a receipt item to see what, where and how you purchased.
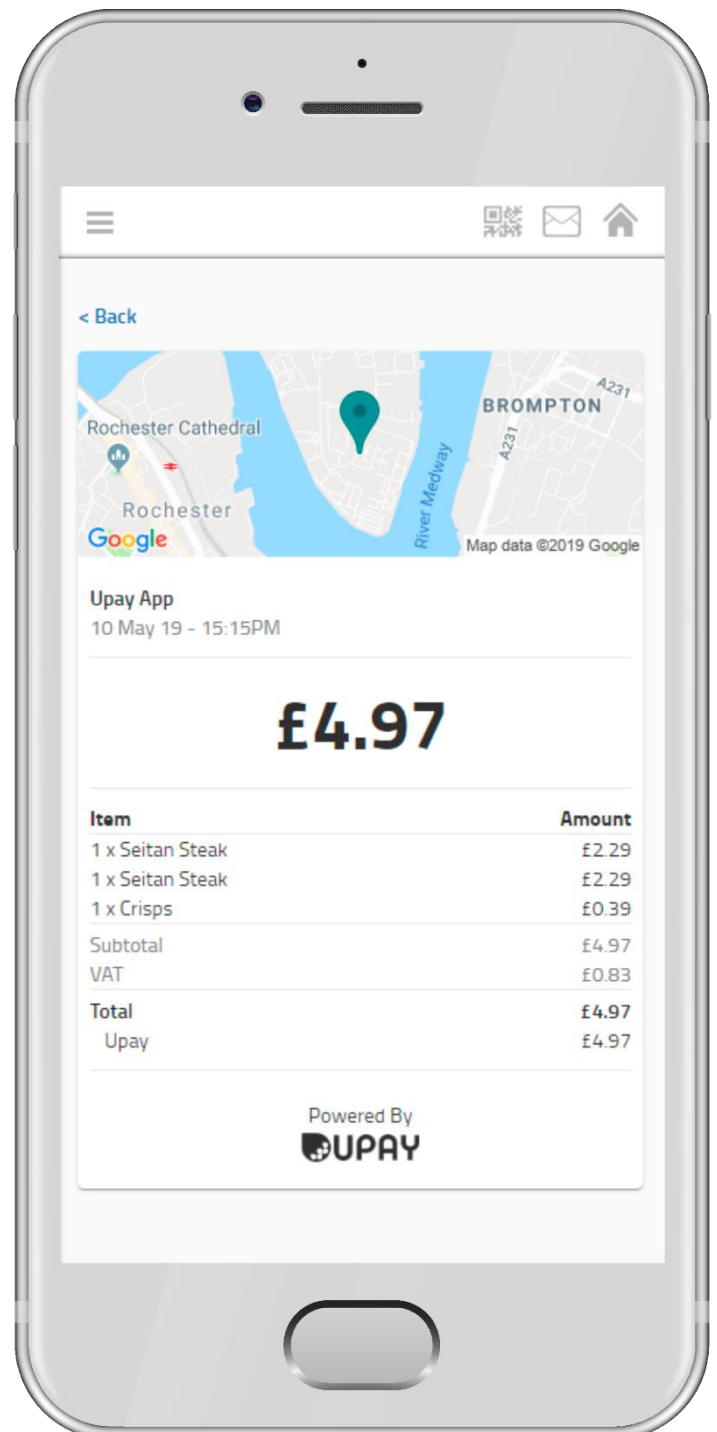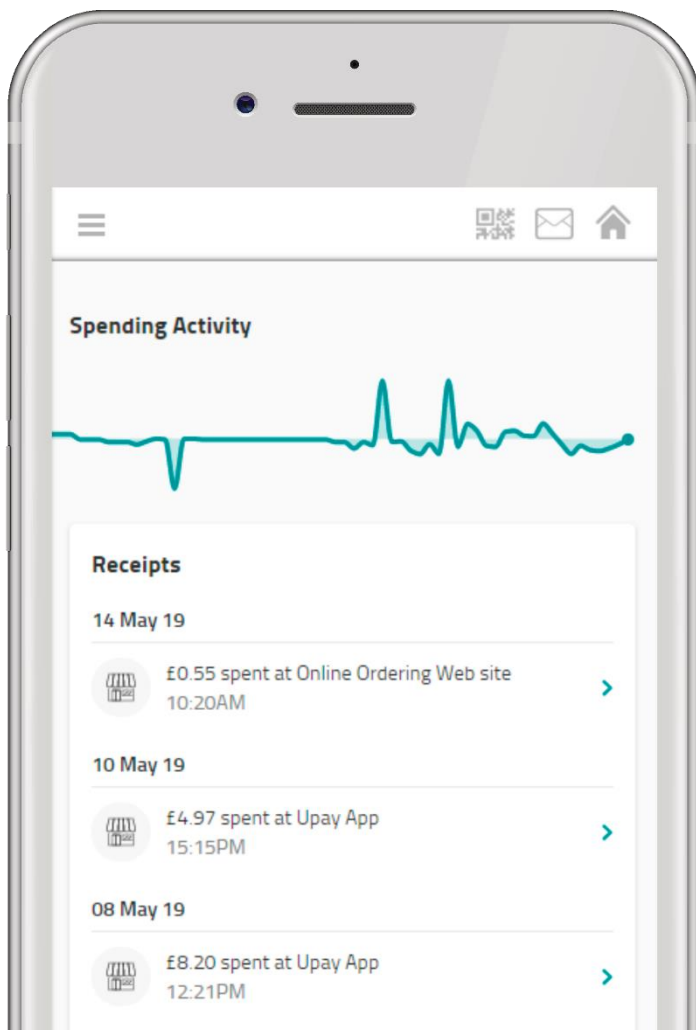
ORImage ORDER AHEAD

If Order Ahead is enabled on your site, access it from the home page or via the main menu.

Your site may sell items such as food & drink and retail items and offer delivery and/or collection.

You can use your cashless purse, debit/credit card, loyalty points or budget account to pay for your orders.
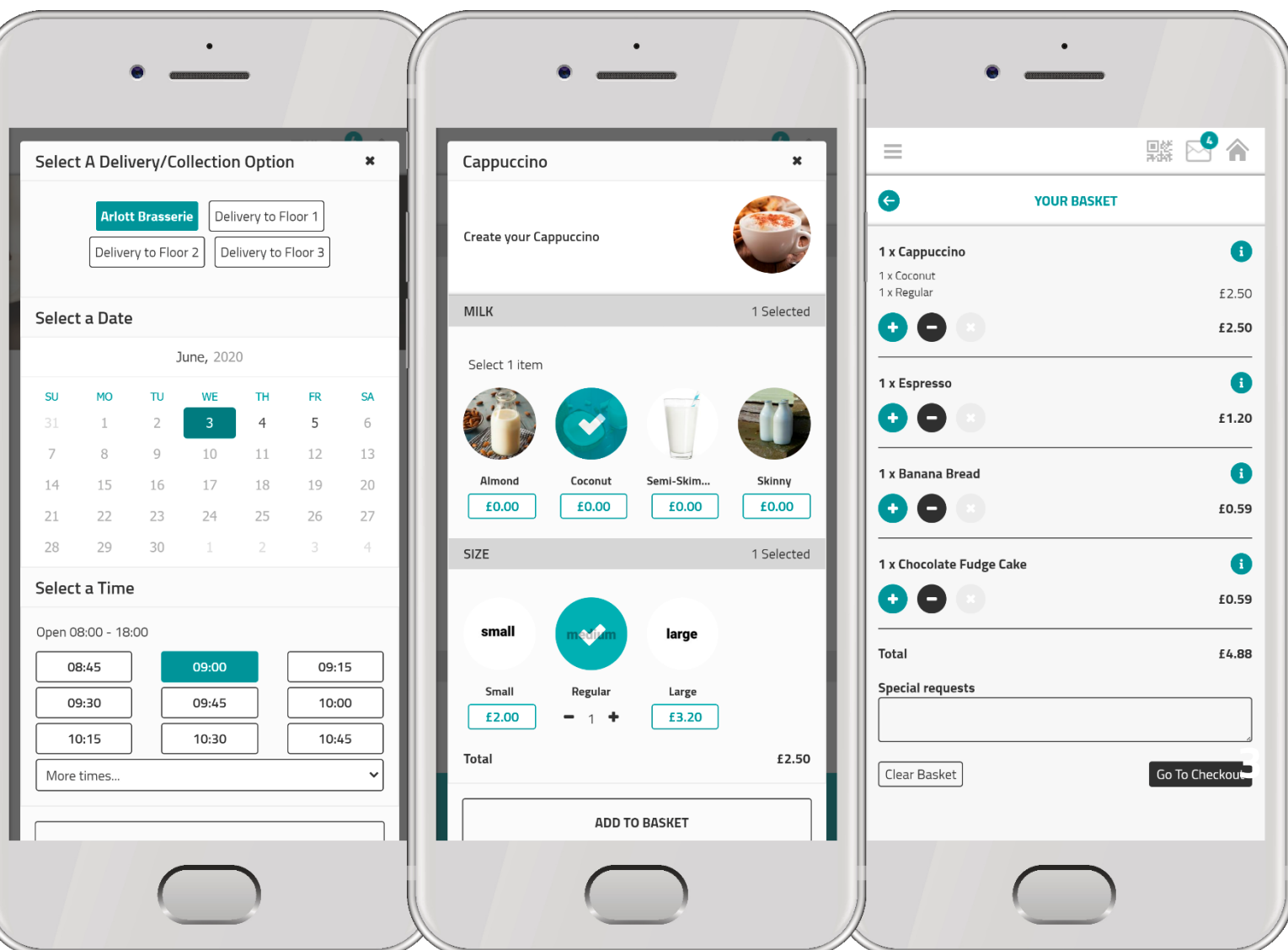
PAYMENTS

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

You can access Payments via the home screen or main menu.

This feature will only show if your site has granted you access to this.
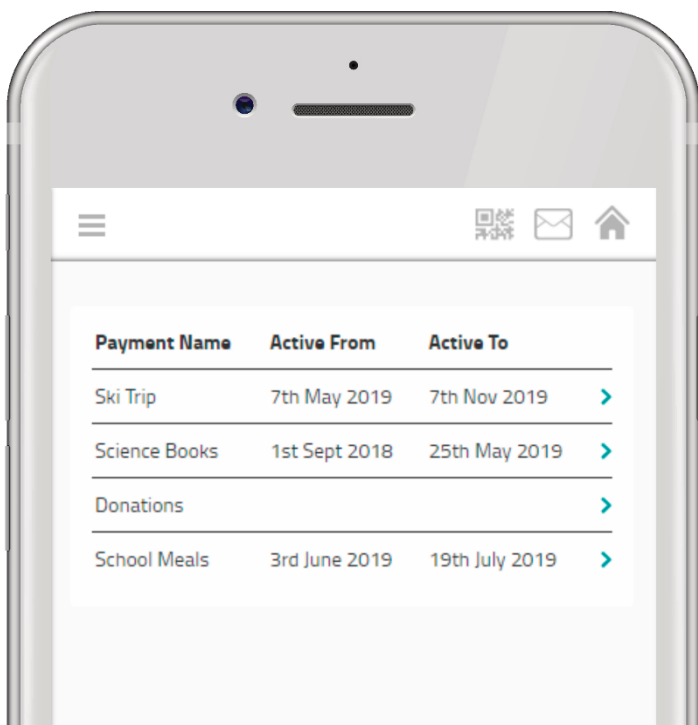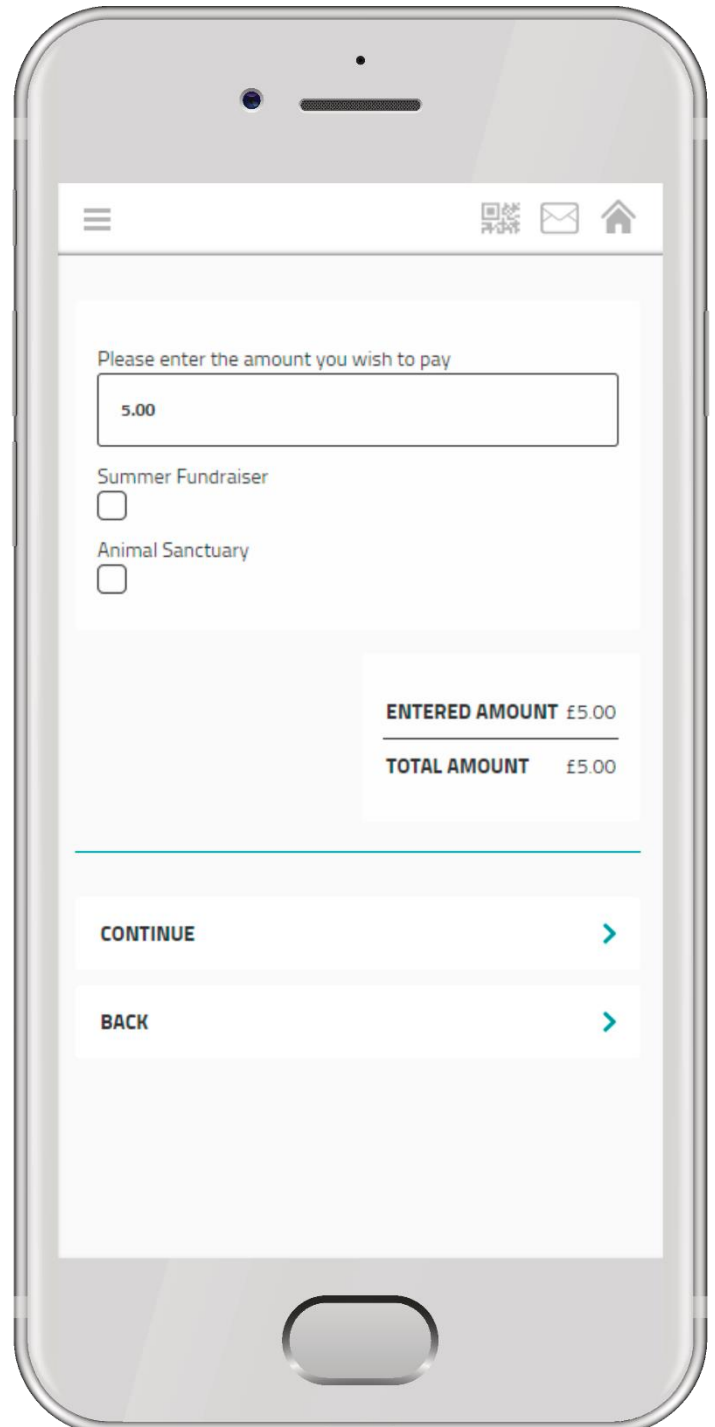
EVENTS

Book onto exciting events that your site is running.

See information including the attendance list, menus and choose meal options for your event (if applicable).

If the event allows it, you can not only book for yourself, but for other guests too!

You can access Events via the home screen or main menu.

This feature will only show if your site has granted you access to this.
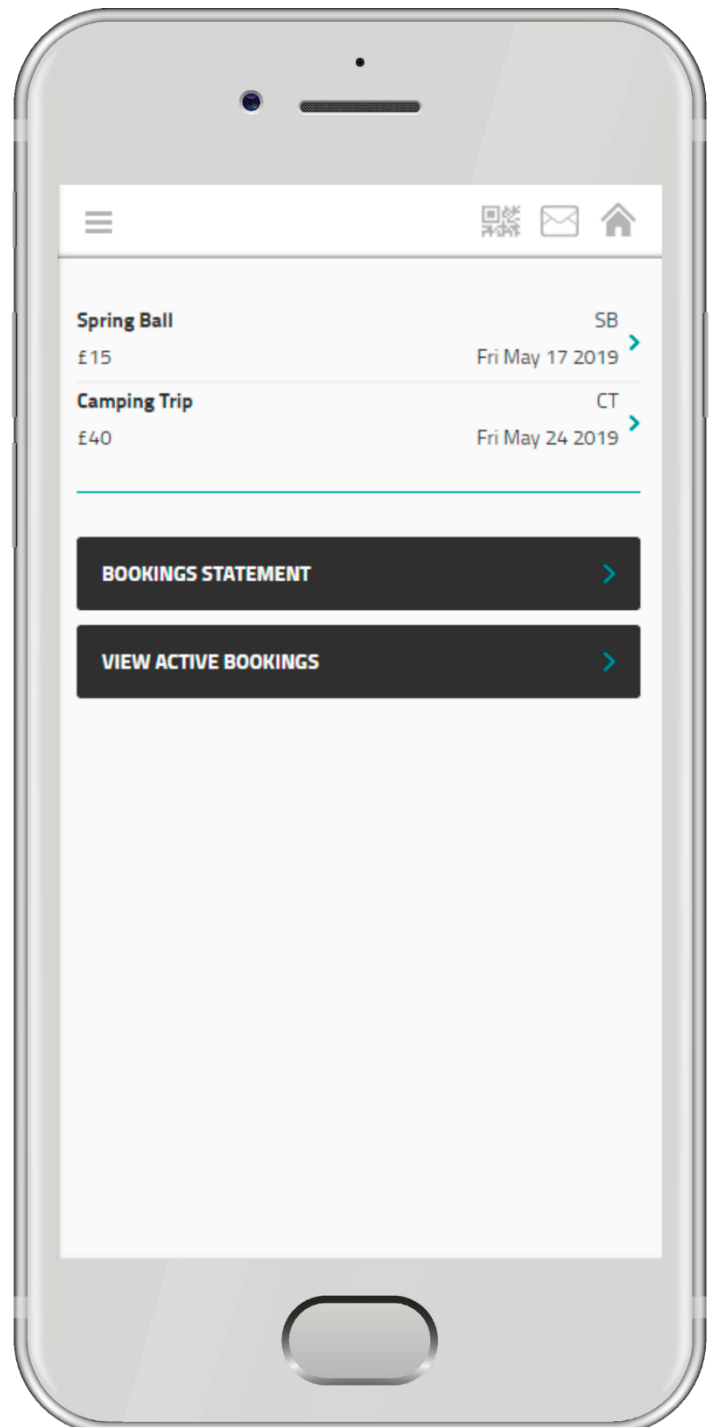
UPAY GO ACCOUNTS

Upay Go accounts do not require topping up.

To use this service, you will follow a different registration process once you enter your Affiliate ID.

> Download the Upay app via the App Store or Google Play.

> Follow the simple steps to create an account.

> When spending in store, at the time of payment, simply scan your QR code.

> Payment will be taken from the assigned card; loyalty points will be redeemed and any promotions activated.

SCAN NOW

212
Loyalty Points

£2.12
Loyalty Value

CLOSE

No need to top-up!

PAY AS YOU GO TOP-UP

Pay as you go top-up allows you to top-up your account in a manual, adhoc way. If you click on Top-Up from the home screen or main menu you can choose how much you want to top-up or enter another value. Please note, if your site does not allow alternative top-up methods (Payroll/Guest) you will be taken straight into the top-up workflow.

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.
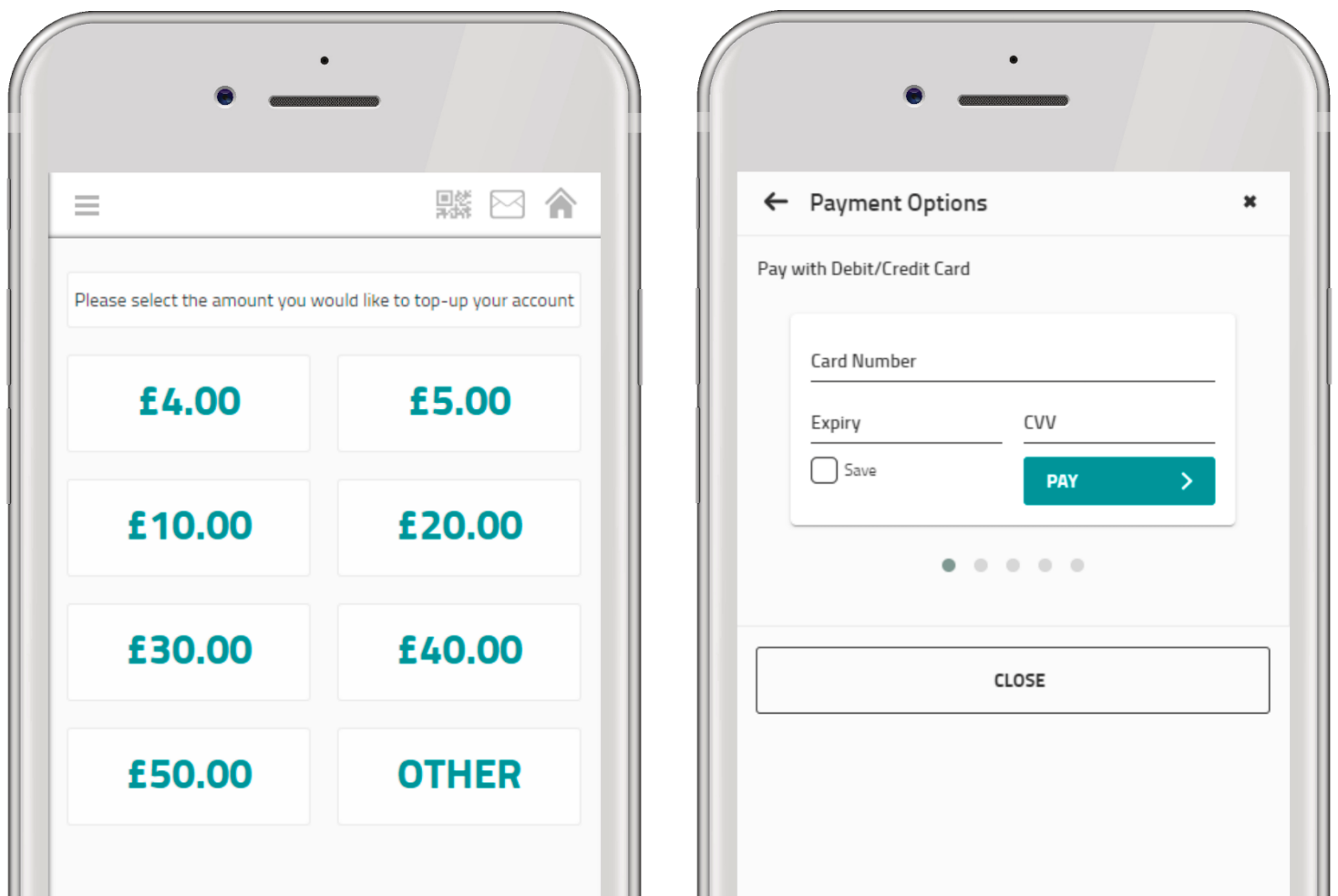
AUTO TOP-UP

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 set this up, go to Account Management in the main menu and then select 'Auto Top-Up'.

You will then be asked to set a minimum trigger amount.

Once you have set your trigger amount, you will then need to set your revalue amount. This is the among that your account will automatically be topped up by, using the debit or credit card you select.

Your Auto Top-up is set up.

Trigger Balance: £5.00
Revalue Amount: £15.00
Card Expiry: 08/21

CHANGE AUTO TOP-UP >

CLEAR AUTO TOP-UP >

Your Quick Top-up is not set up.

You cannot have both Auto Top-up and a Quick Top-up set up at the same time.
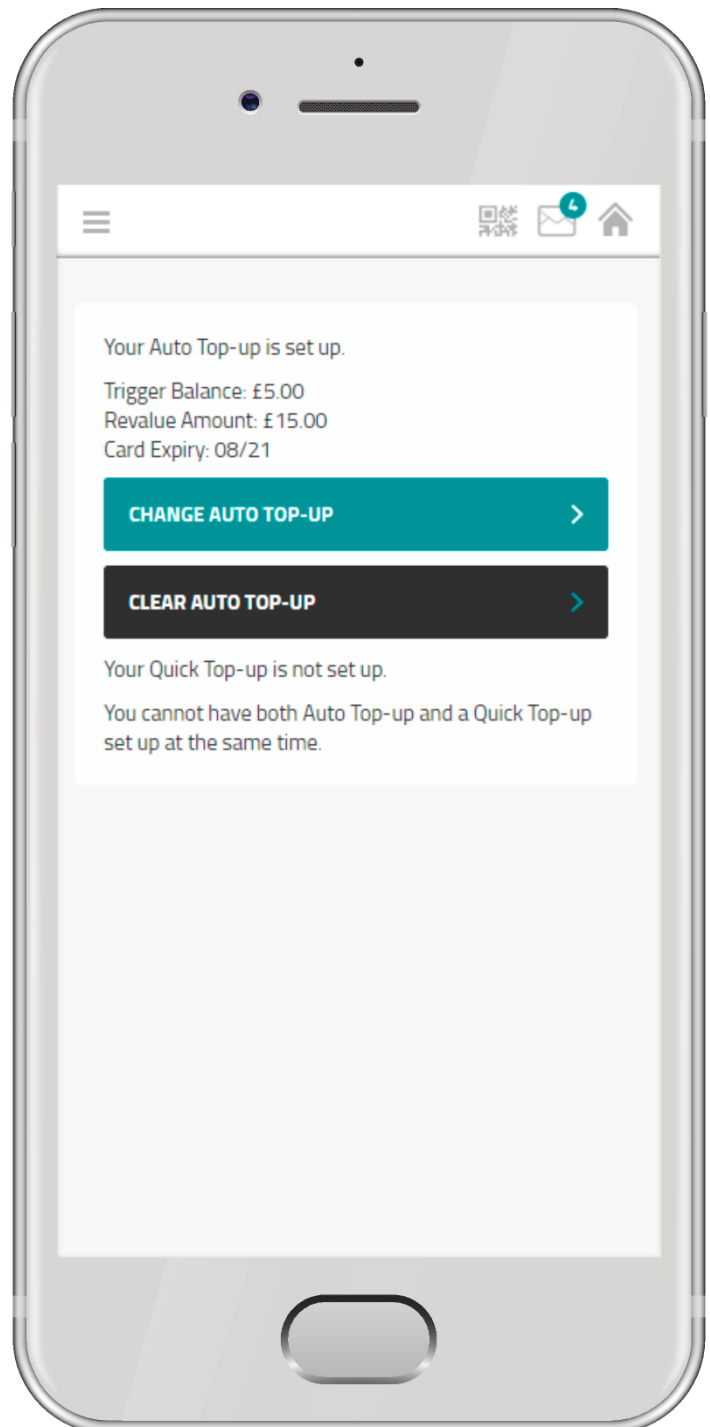
QUICK TOP-UP

This is an alternative option to Auto Top-Up.

The set up of and the process of Quick Top-Up works in a similar way to Auto Top-Up. When your account reaches a pre-set minimum amount, you will receive an email to let you know.

This email will contain a link that will take you straight into the top-up process.

If you have selected a debit/credit card when setting up the Quick Top-Up, all you need to do is enter your cards security code and confirm. If not, choose from a list of your saved card or enter new card details.

Your Quick Top-Up is set up.

Trigger Balance: £5.00
Revalue Amount: £10.00

CLEAR QUICK TOP-UP >

Your Auto Top-up is not set up.

You cannot have both Auto Top-up and Quick Top-Up set up at the same time.
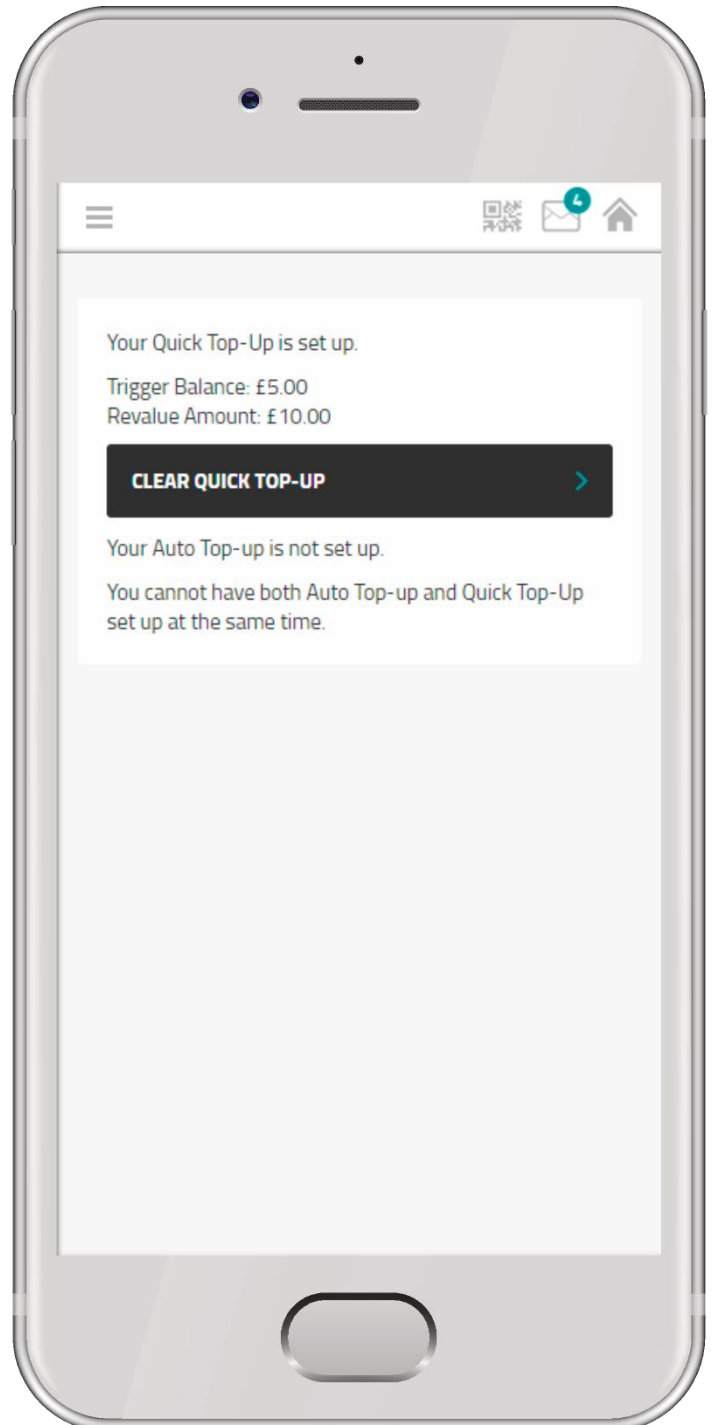
PAYROLL TOP-UP

Some sites allow their staff to top-up via payroll.

In this process, top-up and the amount will be deducted from your monthly payroll at the end of the month.

Select Top-Up from the home screen or main menu.

This feature will only show if your site has granted you access to this.
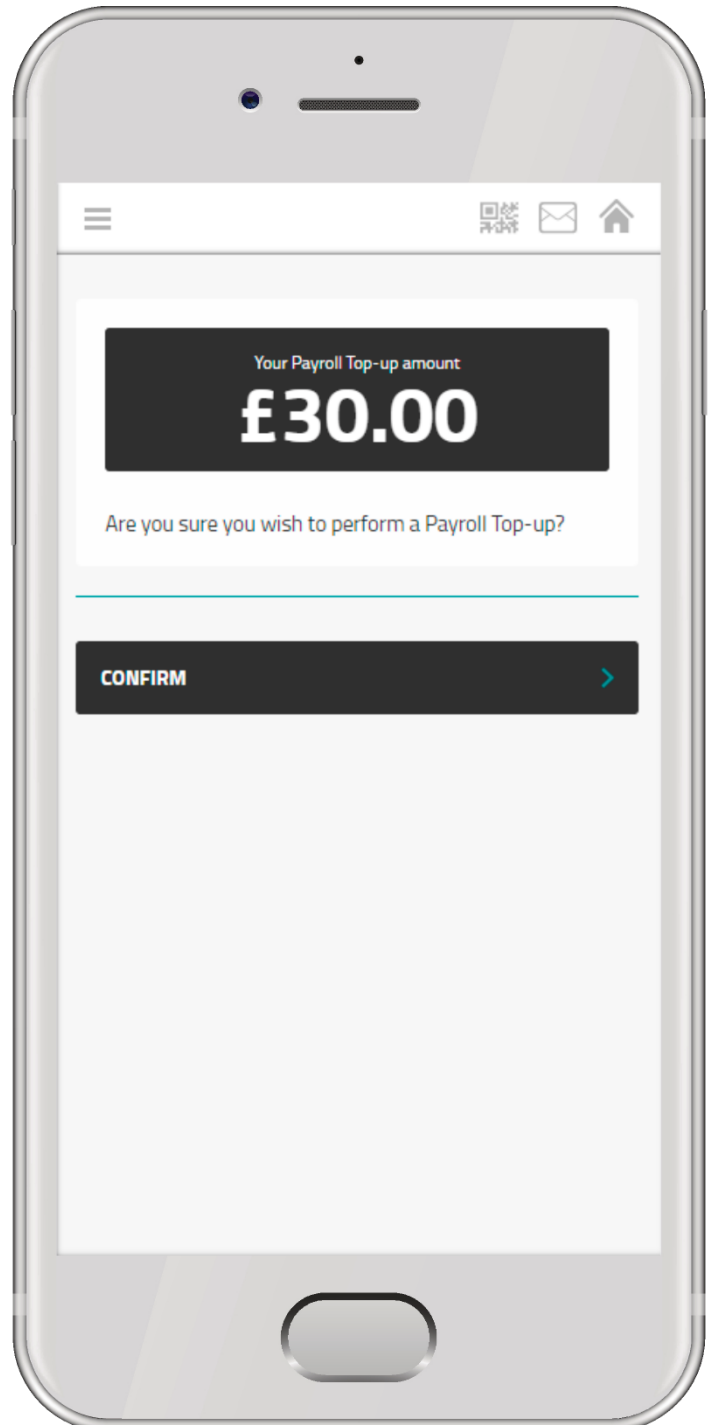
MY WALLET

You can save your data securely with Upay, allowing you to benefit from a quicker top-up process with Pay as You Go, Auto Top-Up and for Upay Go payments.

If you wish to add a card, go to 'Wallet' under Account Management.

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

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

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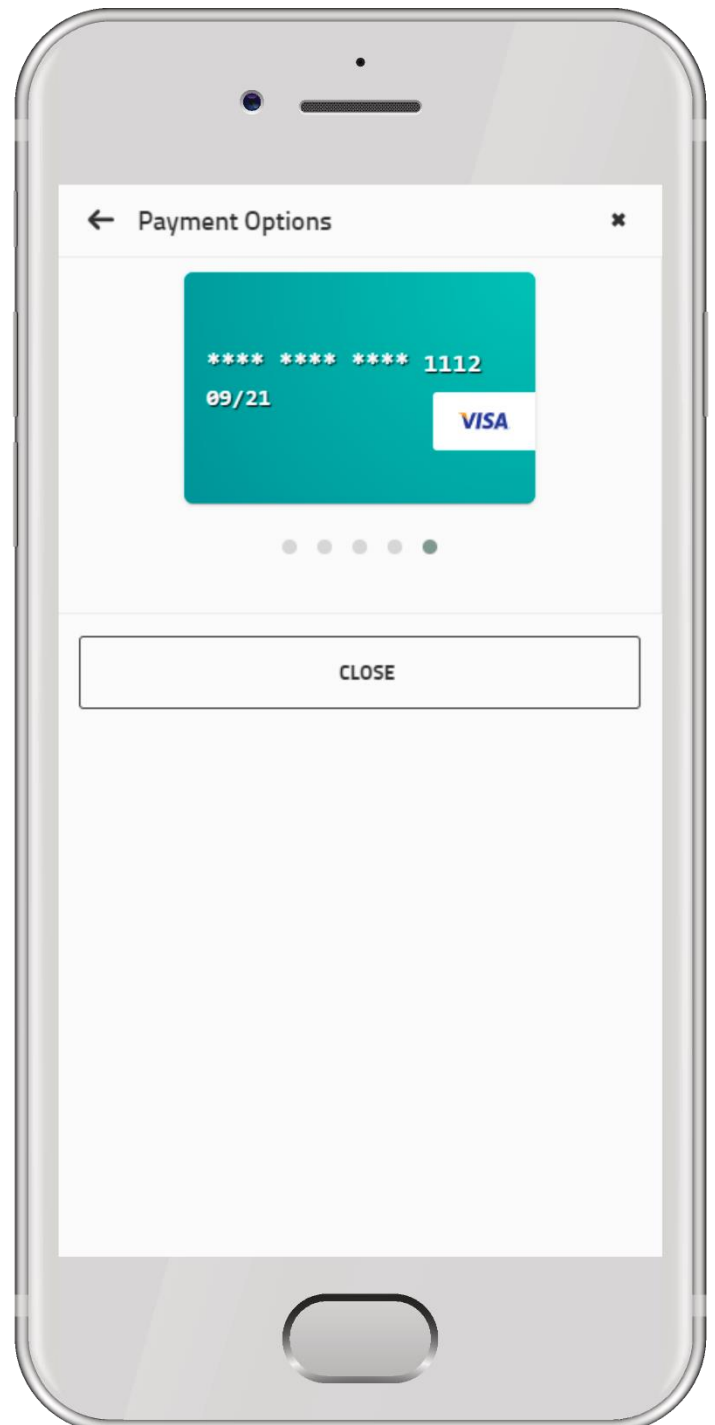
DOCUMENTS

Various documents may be uploaded by your caterers, retailers or facilities teams that use Upay.

These could include:
> Latest offers
> Menus
> Company T's & C's
> Event information
> Other useful information

Be sure to keep an eye out for exciting information!

You can access Documents via the home screen or main menu.

This feature will only show if your site has granted you access to this.
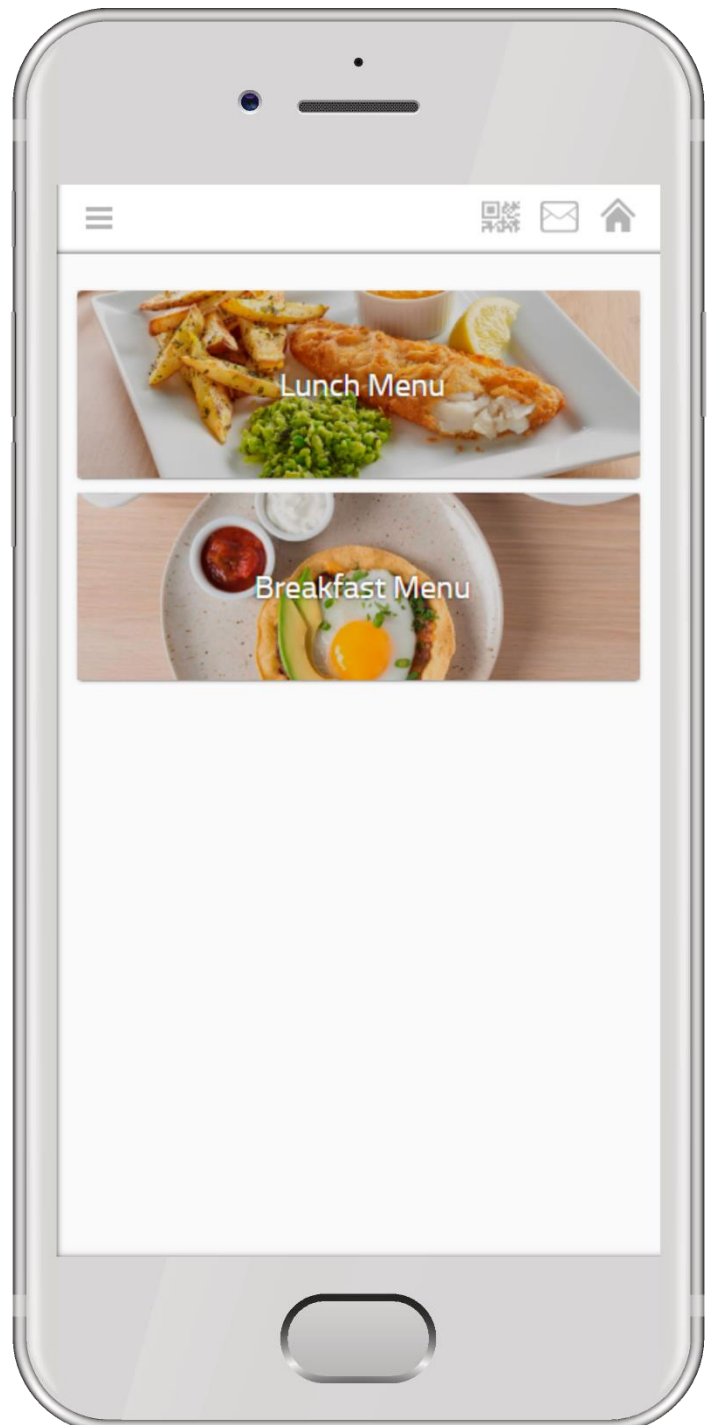
ACCOUNT MANAGEMENT

Manage your account quickly and easily.

In Account Management, you can tailor your account and amend settings.

Make changes to:
> Your details
> Wallet
> Spend limits
> Top-up settings
> Change password
> Change email
> Lost/stolen device
> Close your account

You can access Account Management via the carousel on the home screen or main menu.
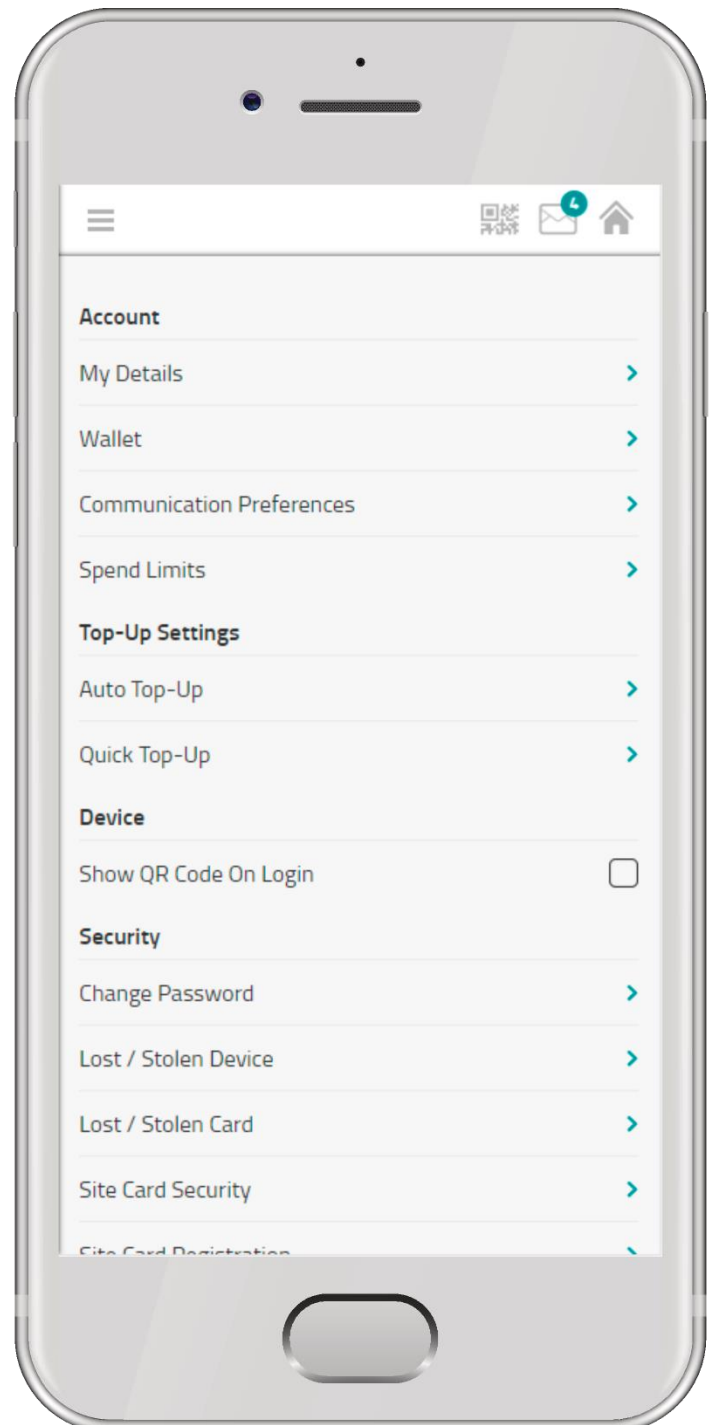
If you need help at any time, please refer to this guide, look for answers in our FAQs or contact us by clicking other in the Help menu.

SECURITY

Upay takes the privacy of your personal information and your data security very seriously.

We follow payment industry standards to ensure you data and funds are safe.

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

You can manage your security settings from the Account Management menu.

Upay is a service created by Uniware Systems Ltd.

ACCOUNT CLOSURE

If you need to close your account, head to Account Management, scroll down and click 'Close Account'.

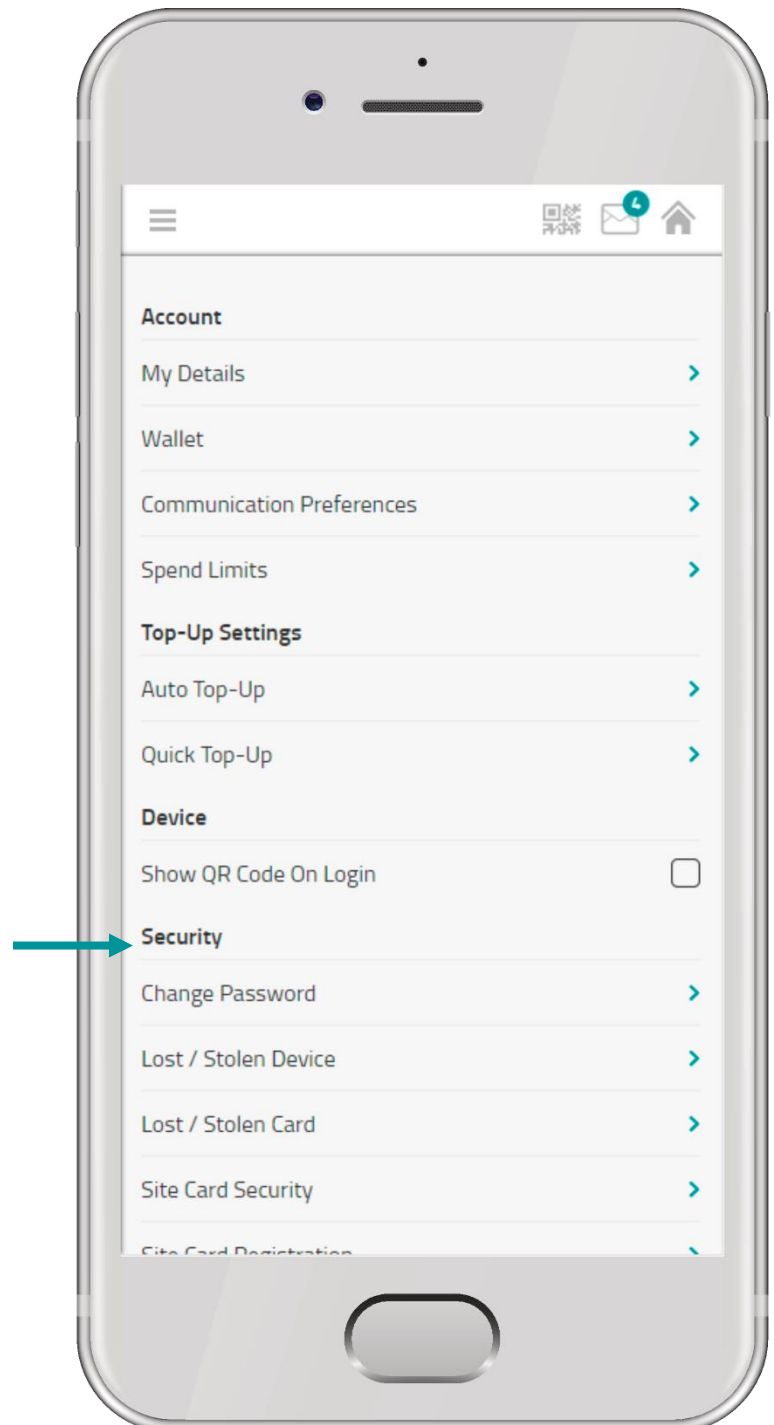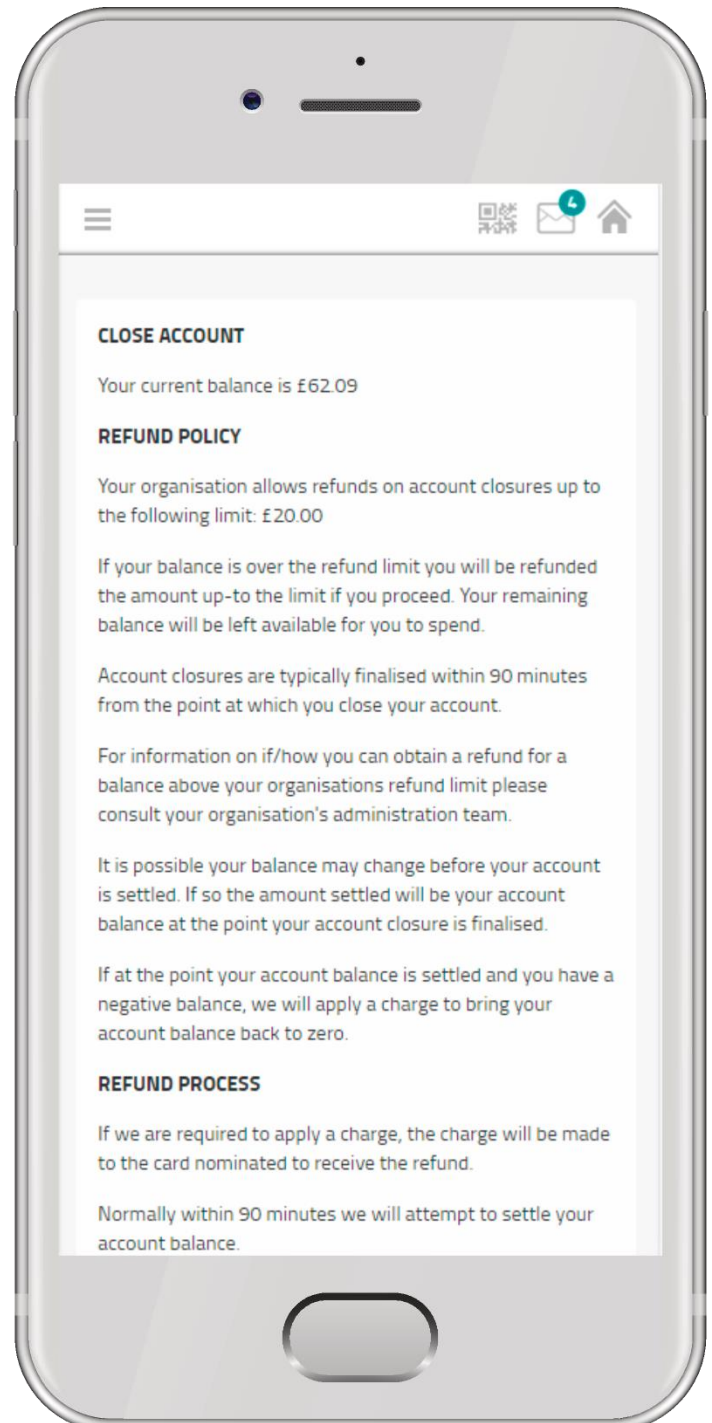If you have no funds, you will just need to confirm that you wish to complete this action. If you do have an outstanding balance, you will be able to refund your account balance to a new or saved card.

Please note, there may be a refund limit 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.

CLOSE ACCOUNT

Your current balance is £62.09

REFUND POLICY

Your organisation allows refunds on account closures up to the following limit: £20.00

If your balance is over the refund limit you will be refunded the amount up-to the limit if you proceed. Your remaining balance will be left available for you to spend.

Account closures are typically finalised within 90 minutes from the point at which you close your account.

For information on if/how you can obtain a refund for a balance above your organisations refund limit please consult your organisation's administration team.

It is possible your balance may change before your account is settled. If so the amount settled will be your account balance at the point your account closure is finalised.

If at the point your account balance is settled and you have a negative balance, we will apply a charge to bring your account balance back to zero.

REFUND PROCESS

If we are required to apply a charge, the charge will be made to the card nominated to receive the refund.

Normally within 90 minutes we will attempt to settle your account balance.

UPAY

THANK YOU!

If you have any questions, please have a look through the help guides on the Upay app or website. These are located in the footer of the desktop menu or in the help section that can be accessed from the main menu.

Alternatively, contact our support team on helpdesk@upay.co.uk who will be more than happy to help you.

Tell us what you think! We appreciate any feedback, please complete this short survey.

If you want to share the love, please leave us a review on the App Store or the Google Play store.

Download on the App Store

GET IT ON Google Play