



# Getting Started with Swipe Checkout

# What's Inside

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Hi! So you're all signed up as a Swipe Checkout merchant and the way you sell online is going to be easier than ever before. In this guide we are going to give you the basics on how to get started with and use Swipe Checkout to grow your business. Simple, no headaches.

In this guide you will learn how to:

- Create transactions
- View transactions
- Create and manage invoices
- Manage your customers
- View reports
- Settle transactions
- Manage products

If you have any questions contact our [help centre](#).

Let's get started

# Viewing and Creating Transactions

## Viewing transactions

To view and create your transactions, navigate to the **Transactions** tab. The **Dashboard** lists current transactions for the day. To view past transactions or export transaction records click **Reports Centre**.

The screenshot displays the Stripe Checkout dashboard interface. At the top, there are navigation links for Exchange rates, Settings, Developers, and Logout. Below this is the Stripe Checkout logo and a main navigation bar with tabs for TRANSACTIONS, CUSTOMERS, MERCHANT TOOLS, and HELP CENTER. The main content area is titled 'Latest Transactions' and features a sidebar with navigation options: Dashboard (highlighted), Create Transaction, Transaction Search, Reports Center, Settlements, Chargebacks, and Refunds. The main content area is divided into two sections: 'Today's Transactions' and 'So far this month'. The 'Today's Transactions' section includes a summary of Today's Average, This Month's Average, and Total Sales This Month, all showing \$0.00. Below this is a table of transactions with columns for Transaction Id, Time, Amount (NZD), Transaction Amount, Customer, Type, and Transaction Status. A single transaction is listed with ID EP33AC1193694, Time 4:33 pm, Amount \$1.00 NZD, Transaction Amount \$1.00 NZD, Customer Test, Type MOTO, and Transaction Status Test-accepted. Below the table is a pagination control showing 1 record per page and a 'show 25 records per page' option. The 'So far this month' section features a line chart showing the amount of transactions over the days of the month, with the y-axis labeled 'Amount' and the x-axis labeled 'Daily'.

Exchange rates Settings Developers Logout

Stripe Checkout

TRANSACTIONS CUSTOMERS MERCHANT TOOLS HELP CENTER

### Latest Transactions

- Dashboard
- Create Transaction
- Transaction Search
- Reports Center
- Settlements
- Chargebacks
- Refunds

#### Today's Transactions

Go to the Reports Center to view past transactions, export transaction records and search for specific transactions.

Today's Average: \$0.00 | This Month's Average: \$0.00 | Total Sales This Month: \$0.00

Transaction Id	Time	Amount (NZD)	Transaction Amount	Customer	Type	Transaction Status
<a href="#">EP33AC1193694</a>	4:33 pm	\$1.00 NZD	\$1.00 NZD	Test	MOTO	Test-accepted

1 show 25 records per page

Visit the [Reports Center](#) for more transactions

#### So far this month

Amount

Daily

## Creating a manual transaction

Click **Create Transaction**.

[Exchange rates](#) [Settings](#) [Developers](#) [Logout](#)

TRANSACTIONSCUSTOMERSMERCHANT TOOLSHELP CENTER

### Create a manual Transaction

In this section you can create a Mail Order/Telephone Order (MOTO) Transaction.

- [Dashboard](#)
- [Create Transaction](#)
- [Transaction Search](#)
- [Reports Center](#)
- [Settlements](#)
- [Chargebacks](#)
- [Refunds](#)

**Item Description:**

**Transaction Amount:** \$

**Credit Card Number:**  -  -  -  ✔ Testing number

**Card Type:**    

**Name on Card:**

**Expiry Date:**  /

**CVV Number:**  [what's this?](#)

**Email address for receipt:**   
This will email an electronic receipt of this transaction.

[Process Transaction](#)

Complete the required fields:

- **Item Description**
- **Transaction Amount** (No less than \$1)
- **Credit Card Number** (Valid or Test)
- **Card Type** (Visa or Master Card)
- **Name on Card** (Same as on Credit Card)
- **Expiry Date** (Same as on Credit Card)
- **CVV Number** (Back side of Credit Card)
- **Email Address** (To receive transaction receipt)

Click **Process Transaction** to complete the manual transaction.

## Finding transactions

To view a particular transaction click **Transaction Search**. There are three types of searchable transaction methods:

- Manual (Merchant Web App)
- Manual (Android / iOS device)
- Payment Gateway (Website Hosted Payment)

### Search Through Transaction History

Dashboard

Create Transaction

**Transaction Search**

Reports Center

Settlements

Chargebacks

Refunds

Use the filters below to search for transactions

By Date: 2013-08-15 to 2013-08-22 [Reset to today](#)

Transaction ID:

Last 4 Digits of Card:

Card Type:  VISA  MasterCard  Any

Customer Email:

Customer Mobile Number:

Transaction Status: All Transactions

Transaction Currency: All Currencies

[Search Transactions](#) Search complete

**Found 1 results matching your criteria.**

[Search Again](#)

[Export](#)

Transaction Id	Date	Time	Amount (NZD)	Transaction Amount	Type	Customer	Transaction Status
<a href="#">EB33AC1193694</a>	2013-08-22	4:33 pm	\$1.00 NZD	\$1.00 NZD	MOTO	<a href="#">Test</a>	Test-accepted

1 show 25 records per page

Visit the [Reports Center](#) for more transactions

You can filter search results by the following:

- Date
- Transaction ID
- Last 4 digits of CC
- Card Type
- Customer Email
- Customer Mobile Number
- Transaction Status (All, Accepted, Declined or Pending)

# Creating and Viewing Invoices

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To set up and manage your invoices navigate to the **Merchant Tools** tab, click **E-invoices**. To create a new invoice click **New E-invoice**.

The screenshot displays the Swipe Checkout Merchant Tools interface. At the top right, there are links for Exchange rates, Settings, Developers, and Logout. The main navigation bar includes TRANSACTIONS, CUSTOMERS, MERCHANT TOOLS (which is active), and HELP CENTER. The Swipe Checkout logo is on the left. Below the navigation bar, the 'Invoices Center' section is visible. It contains a descriptive paragraph: 'In this section you can setup and manage invoices to request payment from your customers. Its really simple and easy and helps improve your cash-flow by allowing your customers to pay you using their credit card.' On the left side, there is a sidebar menu with options: Dashboard, Manage Products, E-invoices (selected), and Subscription Plans. The main content area is titled 'Current invoices' and features a 'New E-invoice' button. Below the title, there is a checkbox for 'Show cancelled invoices' and a message box stating 'There are no invoices to display.'

**Please note:** Swipe creates a payment gateway for the customer to pay. Swipe does not create the invoice. You must first upload a pre-defined invoice in PDF format to create an E-Invoice with Swipe.

Invoice details	
First Name	<input type="text" value="John"/>
Last Name	<input type="text" value="Smith"/>
Client Email Address	<input type="text" value="john.smith@gmail.com"/>
Phone	<input type="text" value="0212342354"/>
Company	<input type="text" value="John &amp; Smith Ltd"/>
Address	<input type="text" value="12 merchant Avenue,&lt;br/&gt;Lincoln Road,&lt;br/&gt;Auckland - 1234&lt;br/&gt;New Zealand"/>
Invoice reference	<input type="text" value="234534"/>
Total Amount	\$ <input type="text" value="450.00"/>
Invoice Due Date	<input type="text" value="2013-08-24"/>

Upload Pdf invoice	<input type="button" value="Choose File"/> Test DD form.pdf (Pdf format)
Invoice description	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <p>An invoice has been created for you to pay for the goods and services you ordered.</p> </div> <p>You can enter a note to your customer in this section or simply breakdown what the invoice is for. This is <a href="#">how it looks</a> in the invoice when emailed to customer.</p>
Create E-invoice link	<input checked="" type="checkbox"/> With this option checked Swipe Checkout will create http link that will open the invoice online. The link can be copied and pasted into other documents and websites.
Send Invoice straight away	<input checked="" type="checkbox"/> With this option checked Swipe Checkout will send the invoice on submission of this form. <b>You can always send this invoice later from the "Invoices Screen".</b>

**Create E-invoice**

Once your invoice is created the E-invoice is sent to the customer's email address.

[Exchange rates](#)   [Settings](#)   [Developers](#)   [Logout](#)

TRANSACTIONS
CUSTOMERS
MERCHANT TOOLS
HELP CENTER

### E-invoice Center

You can post your refund requests here and the Swipe HQ team will process them for you within 48 hours. All refunds, once processed will be credited back to the cardholder the following morning. So when advising your customers, make sure they are aware that refunds take minimum 3 days and can take up to 5 working days.

<div style="text-align: center; border-bottom: 1px solid #ccc;">  Dashboard </div> <div style="text-align: center; border-bottom: 1px solid #ccc;">  Manage Products </div> <div style="text-align: center; border-bottom: 1px solid #ccc;">  E-invoices </div> <div style="text-align: center;">  Subscription Plans </div>	<div style="background-color: #e0f0e0; padding: 5px; border: 1px solid #ccc; margin-bottom: 5px;"> <p>Your E-invoice has been created.</p> </div> <div style="background-color: #e0f0e0; padding: 5px; border: 1px solid #ccc; margin-bottom: 5px;"> <p>Your E-invoice has been sent to: swapneelsarena91@gmail.com.</p> </div> <p>E-invoice link:</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p><a href="https://merchant.swipehq.com/payments/invoice.php?identifier_id=195BBAF3B82347&amp;invoice_id=79841BBD78795">https://merchant.swipehq.com/payments/invoice.php?identifier_id=195BBAF3B82347&amp;invoice_id=79841BBD78795</a></p> </div> <p><a href="#">Create another E-invoice</a></p>
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The invoice will look like this. Customers can then click the links to download and pay the invoice.

Date:24/08/13

## New Invoice Request from Swapneel Saxena

Swapneel Saxena has sent you a new payment request with an invoice for payment via credit card. Please follow the instructions in this email to complete the transaction.

<p><b>Payment Request to:</b></p> <p>John Smith John &amp; Smith Ltd 12 merchant Avenue, Lincoln Road, Auckland - 1234 New Zealand <a href="mailto:swapneelsaxena91@gmail.com">swapneelsaxena91@gmail.com</a> <a href="tel:0212342354">0212342354</a></p>	<p><b>Payment Request From:</b></p> <p>Swapneel Saxena Swipe Testing L12, 49 Symonds Street <a href="mailto:swapneelsaxena91@gmail.com">swapneelsaxena91@gmail.com</a> <a href="tel:09 368 5017">09 368 5017</a></p>
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An invoice has been created for you to pay for the goods and services you ordered.

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Invoice Amount:

**450.00**

[Download Invoice](#)

[Make Payment Online](#)

Learn more about [Swipe HQ](#)

# Viewing Reports

Navigate to the **Transactions** tab and click **Reports Centre** and select the type of report you would like to run. To specify your own search criteria use **Transaction Search**. To search by card type click **Transactions by Card Type**. Select the date range and click **Run this Report**.

Exchange rates Settings Developers Logout

Swipe Checkout

TRANSACTIONS CUSTOMERS MERCHANT TOOLS HELP CENTER

### Reports Center

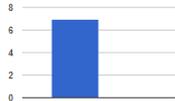
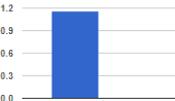
The Report Center has several pre-defined reports that you can run by simply customising the date range to produce the results you're looking for. If you want to specify your own reporting criteria, try searching through the transaction records.

- Dashboard
- Manage Subscriptions
- Create Transaction
- Transaction Search
- Reports Center**
- Settlements
- Chargebacks
- Refunds

#### Select a report you wish to run

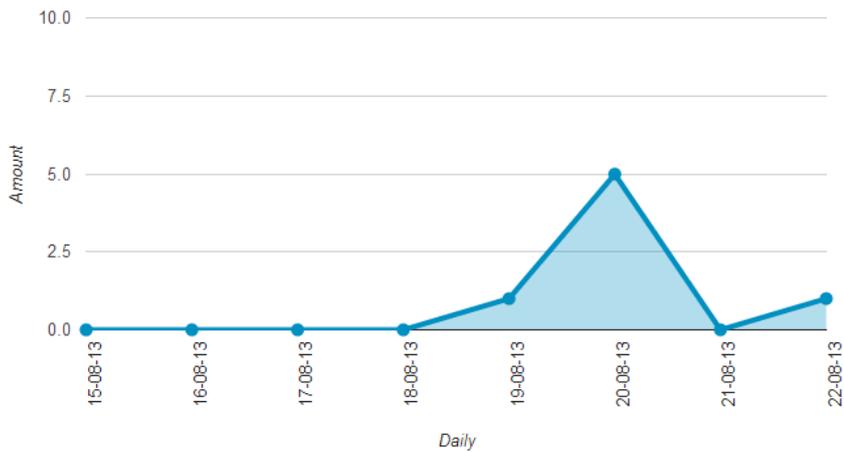
- [Transactions by Card Type](#)
- [Transactions by Date](#)
- [Averages and Sales](#)

#### Transactions by Card Type (From:2013-08-15 To:2013-08-22)

Visa Transactions  \$6.99	MasterCard Transactions  \$0.00	
Average Value  \$1.17	Average Value  \$0.00	

To search by date click **Transactions by Date** then select the date range, click **Run this Report**.

Transactions by Date group by: Daily (From:15-08-2013 To:22-08-2013)



1 show 25 records per page

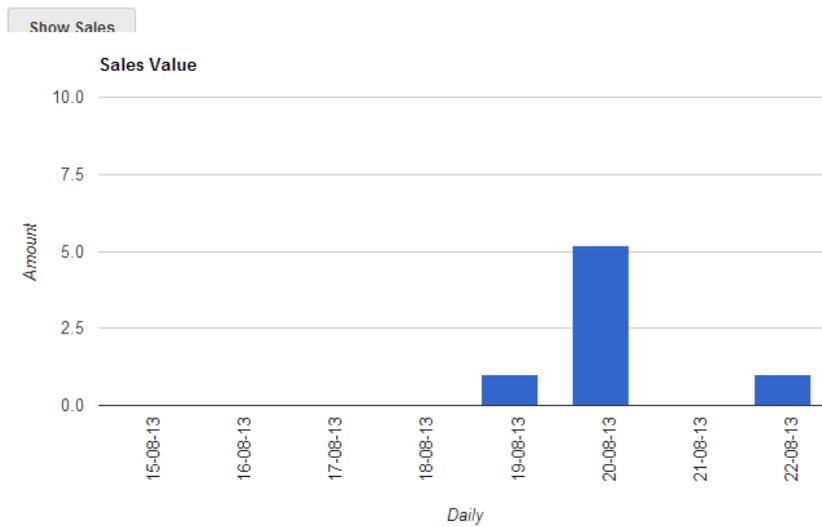
[Export](#)

Total: \$6.99

Transaction ref	Date	Value	Type	Card Holder	Email	Status
<a href="#">798375AB43E42</a>	19/08/2013	\$1.00	card			accepted
<a href="#">EB3355D263D8C</a>	20/08/2013	\$1.00	card			accepted
<a href="#">B25B7ED80DB0C</a>	20/08/2013	\$1.99	card			accepted
<a href="#">EB33695A7F089</a>	20/08/2013	\$1.00	card			accepted
<a href="#">1240B53BDEDB82</a>	20/08/2013	\$1.00	card			accepted
<a href="#">195BB68D596A39</a>	22/08/2013	\$1.00	card			accepted

To run a sales report for a specified time period click **Averages and Sales** and select the date range, then click **Run this Report**.

**Averages and Sales (From:2013-08-15 To:2013-08-22)**

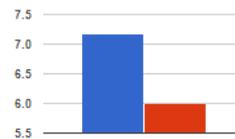


Total Sales Value

**\$7.18**

Total Sales

**6**

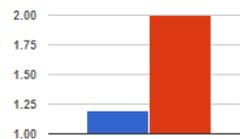


Average Txns Value

**\$1.20**

Average Daily Txns

**2.00**



This report shows you:

- Total sales and sale value
- Average transactions value

# Settling Transactions

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To view your upcoming settlements navigate to **Transactions** and click **Settlements**. Transactions occurring on day1 will show up in your merchant account on day 4. If the transaction occurred over the weekend, these transactions are treated as if they occurred on a Monday and will show up in your merchant account on Thursday.

## Settlements of funds into your bank account

Settlements are processed within 2 working days unless a transaction is under investigation, is being audited or verified. For all transactions that take place between 6pm & midnight (NZST), funds will take up to 3 working days to appear in your account (so on the morning of the fourth working day).

[Exchange rates](#) [Settings](#) [Developers](#) [Logout](#)



[TRANSACTIONS](#) [CUSTOMERS](#) [MERCHANT TOOLS](#) [HELP CENTER](#)

### Settlement History

In this section you will be able to see all upcoming settlements. Transactions occurring on Day 1 are going to show up in your account on the morning of Day 4 (ignoring weekends). Transactions happening over the weekend are treated as transactions happening on a Monday and will be show up in your account on Thursday morning.

- [Dashboard](#)
- [Manage Subscriptions](#)
- [Create Transaction](#)
- [Transaction Search](#)
- [Reports Center](#)
- [Settlements](#)
- [Chargebacks](#)
- [Refunds](#)

#### Historical Settlements

[Export to CSV](#)

Date	Settlement Id	Total credit	Total debit	Total transaction fee	Settlement Total
21 Aug 2013	<a href="#">7983AD5F423AB</a>	\$1.00	-\$0.00	-\$0.03	\$0.97
16 Aug 2013	<a href="#">2076A744806351</a>	\$1.00	-\$0.00	-\$0.03	\$0.97
15 Aug 2013	<a href="#">7982EC3FFED81</a>	\$1.20	-\$0.00	-\$0.04	\$1.16
09 Aug 2013	<a href="#">12409F09DC9238</a>	\$2.00	-\$0.00	-\$0.06	\$1.94
08 Aug 2013	<a href="#">EB31DF6D61692</a>	\$2.00	-\$0.00	-\$0.06	\$1.94
01 Aug 2013	<a href="#">12408F21C435E6</a>	\$2.00	-\$0.00	-\$0.06	\$1.94
30 Jul 2013	<a href="#">7980E8FAC050A</a>	\$4.22	-\$0.00	-\$0.13	\$4.09
29 Jul 2013	<a href="#">15CE0749D0EF2C</a>	\$1.00	-\$0.00	-\$0.03	\$0.97
26 Jul 2013	<a href="#">1240827EF2AAE4</a>	\$2.00	-\$0.00	-\$0.06	\$1.94
27 Jun 2013	<a href="#">40A4E097C1B48</a>	\$1.00	-\$0.00	-\$0.03	\$0.97
21 Jun 2013	<a href="#">2E41275FE9E2C</a>	\$4.00	-\$0.00	-\$0.12	\$3.88
28 May 2013	<a href="#">1CE88809383690</a>	\$3.18	-\$0.00	-\$0.10	\$3.08
22 May 2013	<a href="#">7978421C4E6EA</a>	\$3.00	-\$0.00	-\$0.09	\$2.91
16 May 2013	<a href="#">1783EEAD97A07</a>	\$6.30	-\$0.00	-\$0.18	\$6.12

You can export your reports of your settlement history by clicking **Export to CSV**.

## Creating settlement tickets

If you have any queries regarding transaction settlements you can create a settlement ticket within your merchant account. Click the **Settlement ID** link you want to query.

Dashboard	<b>Historical Settlements</b> <a href="#">Export to CSV</a>					
Manage Subscriptions	Date	Settlement Id	Total credit	Total debit	Total transaction fee	Settlement Total
	21 Aug 2013	<a href="#">7983AD5F423AB</a>	\$1.00	-\$0.00	-\$0.03	\$0.97

### Click Raise a Ticket

Dashboard	<b>\$0.97 in Settlements for: 2013-08-21</b> <a href="#">Export to CSV</a>					
Manage Subscriptions	<a href="#">Raise a Ticket</a>	<a href="#">Return to Historical Settlements</a>	<a href="#">View Tickets</a>	<a href="#">Print this</a>		
Create Transaction	Date/Time	Reference	Txn Type	Debits	Fee	Credits
Transaction Search	19 Aug 2013, at 15:08	<a href="#">798375AB43E42</a>	card		\$0.03	\$ 1.00
	Sub Total of Debits & Credits			-\$0.00	\$0.03	\$1.00

Enter any notes relating to the settlement and click **Create Ticket**.

### Create Ticket

Settlement reference: 7983AD5F423AB

Test - Please make me understand this payment. It has \$5 less as to what expected]

[Create ticket](#)

Great! You have now created a response ticket. This response ticket is displayed below the corresponding **Settlement ID** and an email has been sent to the Swipe Investigation Team for investigation.

---

**Tickets so far**



Date: 2013-08-24 at 17:08

Test - Please make me understand this payment. It has \$5 less as to what expected.

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# Managing Your Products

Navigate to the **Merchant Tools** tab and click **Manage Products** from the side menu. In this section you can create and manage your products.

Exchange rates Settings Developers Logout

Swipe Checkout TRANSACTIONS CUSTOMERS MERCHANT TOOLS HELP CENTER

## Manage Products in the Storefront

Dashboard Manage Products E-invoices

**Quick Stats** [New Product](#)

### Manage Products

Lookup a product to edit product properties.

(Type product name to see edit options)  
 Show all products

[Lookup](#)

Found 2 matching result(s)

Product Id	Product	Price	
<a href="#">1784F6D6CF137</a>	<a href="#">Test - Real Card</a>	\$1.00	
<a href="#">7981B3FFC70C3</a>	<a href="#">Test-Receipts</a>	\$1.00	

1 show 25 records per page

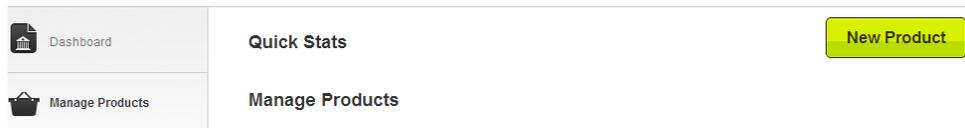
Storefront last updated 06 Aug 2013, 01:03pm

### Recently Sold (Week)

There are no recently sold products.

## Creating a new product

To create a new product, click **New Product**.



Complete the required fields.

Product name

Bread

Description

This is a speciality Vogel bread.

Price

\$ 2.50 NZD

Enter the price of this product including any taxes or additional applicable charges. This is the amount your customer will be charged.

#### Minimum Purchase Quantity

Does the customer need to purchase a minimum of X number of this item in order to get this price? If yes, enter the amount. If no, leave it set to 1.

#### Redirection URL's

With this feature you can choose whether you want to redirect your customers to another page after they have made a payment. This is useful if you need to send the user to a particular page on your website, or if you do not want to use Swipe HQ's default 'Accepted' and 'Declined' pages.

**Please Note:** These redirection URL's will over ride the Callback URL that can be set in the Payment Notifiers section for this product. Only use this option if you want to redirect the user for this particular product.

- Do not redirect back to my site after payment has been made.
- Redirect the customer back to one of my website's pages after payment has been made.

Current button style: **Default style**

Select a button style to use. You can create more buttons style under Settings > Create buy now buttons

Button style: Default style

submit

- Include a Textbox with the button to collect item quantity.

Create new Product

Click **Create new Product**.

Paste the generated HTML code into your website to create a image based button.

## Create Product

Dashboard

Manage Products

E-invoices

Copy and paste this html into your webpage to create a button:

```
<form action="https://payment.swipehq.com/" method="POST"
enctype="multipart/form-data">
<table>
<tr>
<td>
<input style="background-color: #FFFFFF; border: 1px solid
#CCCCCC; padding: 5px;" type="text" id="item_quantity"
name="item_quantity" size="3" value="1" />
</td>
<td>
<div style="width:95px; height:30px; border: thin solid grey;
background-color: #9FBF00; text-align: center; border-radius: 9px; cursor:
pointer;">
<table cellpadding="0" cellspacing="0" border="0" width="100%"
height="100%">
<tr>
<td align="center" style="border: none;">
<input style="cursor:pointer; color:#fff; text-decoration: none;
font-family:'Arial', 'Helvetica', sans-serif; font-size: 14px; font-weight: bold;
border: none; background-color: #9FBF00;" type="submit" id="submit"
value="submit" name="submit" />
<input type="hidden" id="product_id" name="product_id"
value="195BBAE30F1C45" />
</td>
</tr>
</table>
</td>
</tr>
</table>
</form>
```

Preview:

1

Your payment page will look like this.

Please enter your credit card information

1 x Bread for \$2.50 NZD

This transaction will be processed in New Zealand Dollars and will appear on your bank statement as SHQ Swapneel.

#### Customer Service Information

**Legal Name:** Swipe Testing  
is a registered New Zealand company.

**Physical Address:** L12, 49 Symonds Street  
Auckland CBD  
Auckland  
[View Map](#)

**Phone Number:** 0211751669

**Email Address:** [swapneel.saxena91@gmail.com](mailto:swapneel.saxena91@gmail.com)

**Website:** <http://www.swipehq.com>

Credit Card Number: 1234 - 1234 - 1234 - 1234  Testing number

Card Type:    

Name on Card:

Expiry Date:  /

CVV2 Number:  [whats this?](#)

Email address for receipt:

**Pay Now**

Refund policy	Cancellation policy	Delivery policy	Other Conditions
Refund back in 5 days	Cancellation approved maximum of 5 days after purchase	3 to 5 Working days	Other terms and conditons apply

Payment Processing Powered by



Your transaction approval page will look like this.

---

Transaction Approved

Your payment has been processed. An email confirming this transaction has been sent to [swapneels@optimizerhq.com](mailto:swapneels@optimizerhq.com). If you do not receive the transaction confirmation email, please contact Swipe Testing on the details below.

**Customer Service Information**

**Company Name:** Swipe Testing  
**Physical Address:** L12, 49 Symonds Street  
Auckland CBD  
[View Map](#)  
**Phone Number:** 0211751669  
**Email Address:** [swapneelsaxena91@gmail.com](mailto:swapneelsaxena91@gmail.com)  
**Website:** <http://www.swipehq.com>

---

Payment Processing Powered by



This is our test account. Your customers will receive a receipt like this below.

This receipt is for test transaction: EB33EF7B35F27, from the Swipe HQ Checkout system.

### Receipt from Swipe Testing

Swipe Testing has sent you a receipt for a payment made via credit card.

Order details:

Item	Quantity	Unit Price
Bread	1	\$2.50

GST: 345345345

Company Name: Swipe Testing

Physical Address: L12, 49 Symonds Street

Phone Number: 0211751669

Email Address: [swapneelsaxena91@gmail.com](mailto:swapneelsaxena91@gmail.com)

Total Amount Paid:

**\$2.50**

This transaction will appear on your credit card statement as SHQ Swpaneel

Learn more about [Swipe HQ](#)

Powered by [Optimizer HQ](#)



**\*\*PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL.  
If you reply to this email you will not receive a response.\*\***

## Managing your products

You can search for products using the **Lookup** button.

### Manage Products in the Storefront

 Dashboard

 Manage Products

 E-invoices

**Quick Stats** [New Product](#)

**Manage Products**

Lookup a product to edit product properties.

  
(Type product name to see edit options)  
 Show all products

**Lookup**

Storefront last updated 24 Aug 2013, 06:41pm

**Recently Sold (Week)**

Found 1 matching result(s)

Date/Time	Product	Customer	Price	Total
24/08/2013 06:49:50 PM		<a href="#">Swipe-Test</a>	\$0.00	\$2.50
Total: \$2.50				

  1   show 25   records per page

## Viewing and editing product details

To view a product report click on the **Product ID** or **Product Name**.

### Manage Products in the Storefront

Dashboard

Manage Products

E-invoices

**Quick Stats** New Product

**Manage Products**

Lookup a product to edit product properties.

(Type product name to see edit options)

 Show all products

**Lookup**

Found 3 matching result(s)

Product Id	Product	Price	
<a href="#">195BBAE30F1C45</a>	<a href="#">Bread</a>	\$2.50	 
<a href="#">1784F6D6CF137</a>	<a href="#">Test-Real Card</a>	\$1.00	 
<a href="#">7981B3FFC70C3</a>	<a href="#">Test-Receipts</a>	\$1.00	 

Quickly edit product information by clicking the pencil or delete products by clicking the cross.

Product Id	Product	Price	
<a href="#">195BBAE30F1C45</a>	<a href="#">Bread</a>	\$2.50	 

Your product report will look like this. To edit product information click **Edit Product**.

## Bread

Dashboard

Manage Products

E-invoices

### Product details for Bread

Sale Price:	\$2.50
Minimum purchase quantity:	1
Short Description:	This is a speciality Vogel bread.

### Sales Stats for Bread

Sold this month	0
Units sold YTD	0
Responsible for:	<input type="text" value="0%"/>
	of total sales this month
	<input type="text" value="0%"/>
	of total sales this year

### Buy now button code for Bread

Button HTML data:

```
<form
action="https://payments.wipehq.com/"
method="POST" enctype="multipart/form-
data">
  <table>
    <tr>
      <td>
        <input
style="background-color: #FFFFFF;
border: 1px solid #CCCCCC; padding:
5px;" type="text" id="item_quantity"
name="item_quantity" size="3" value="1"
/>
      </td>
    </tr>
  </table>
  <div
style="width:95px; height:30px; border:
thin solid grey; background-color:
#9FBF00; text-align: center; border-
radius: 9px; cursor: pointer;">
```

No Image Available

**Edit Product**

# Managing Your Customers

To manage your customers navigate to the **Customers** tab.

The screenshot shows the 'Manage Your Customers' page in the Swipe Checkout dashboard. The top navigation bar includes 'Exchange rates', 'Settings', 'Developers', and 'Logout'. The main navigation tabs are 'TRANSACTIONS', 'CUSTOMERS', 'MERCHANT TOOLS', and 'HELP CENTER'. The 'CUSTOMERS' tab is active.

The page title is 'Manage Your Customers'. On the left, there is a sidebar with three options: 'My Customers', 'Maxmail HQ', and 'Texta HQ'. The main content area is titled 'Lookup Customer Records' and features two buttons: 'Create Contact' and 'Import Contacts'. Below these is a search input field with the placeholder text 'Search by Name, Email, Mobile Number'. There is also a checkbox labeled 'Show all contacts' and a 'Search' button.

Below the search section, there is a section titled 'By the way' which contains a table of 'Interesting facts related to your business'.

Interesting facts related to your business	
Total number of customer records:	1500
Records with mobile numbers:	122
Records with email addresses:	1495
Records with both:	122

From this page you can:

- View facts related to your customer database
- Lookup customer records
- Manually add new customers to your database
- Import customers to your database

To manually add a new customer click **Create Contact**

Exchange rates Settings Developers Logout

Swipe Checkout

TRANSACTIONS CUSTOMERS MERCHANT TOOLS HELP CENTER

### Manage Your Customers

- My Customers
- Maxmail HQ
- Texta HQ

#### Add a new Contact manually

Current Details on File	
Name:	<input type="text"/>
Email:	<input type="text"/>
Mobile:	<input type="text"/>
Phone:	<input type="text"/>
Company:	<input type="text"/>
Address:	<input type="text"/>
Suburb:	<input type="text"/>
City:	<input type="text"/>
Country:	<input type="text"/>

**Create Contact**

To bulk import customers click **Import Contacts**. Select a CSV file to upload and click **Upload File**.

Exchange rates Settings Developers Logout

Swipe Checkout

TRANSACTIONS CUSTOMERS MERCHANT TOOLS HELP CENTER

### Import Customers

- My Customers
- Maxmail HQ
- Texta HQ

Select a csv file to upload:

No file selected.

**Upload file**