Taler Merchant Portal Instructions

Login to Taler Merchant Portal

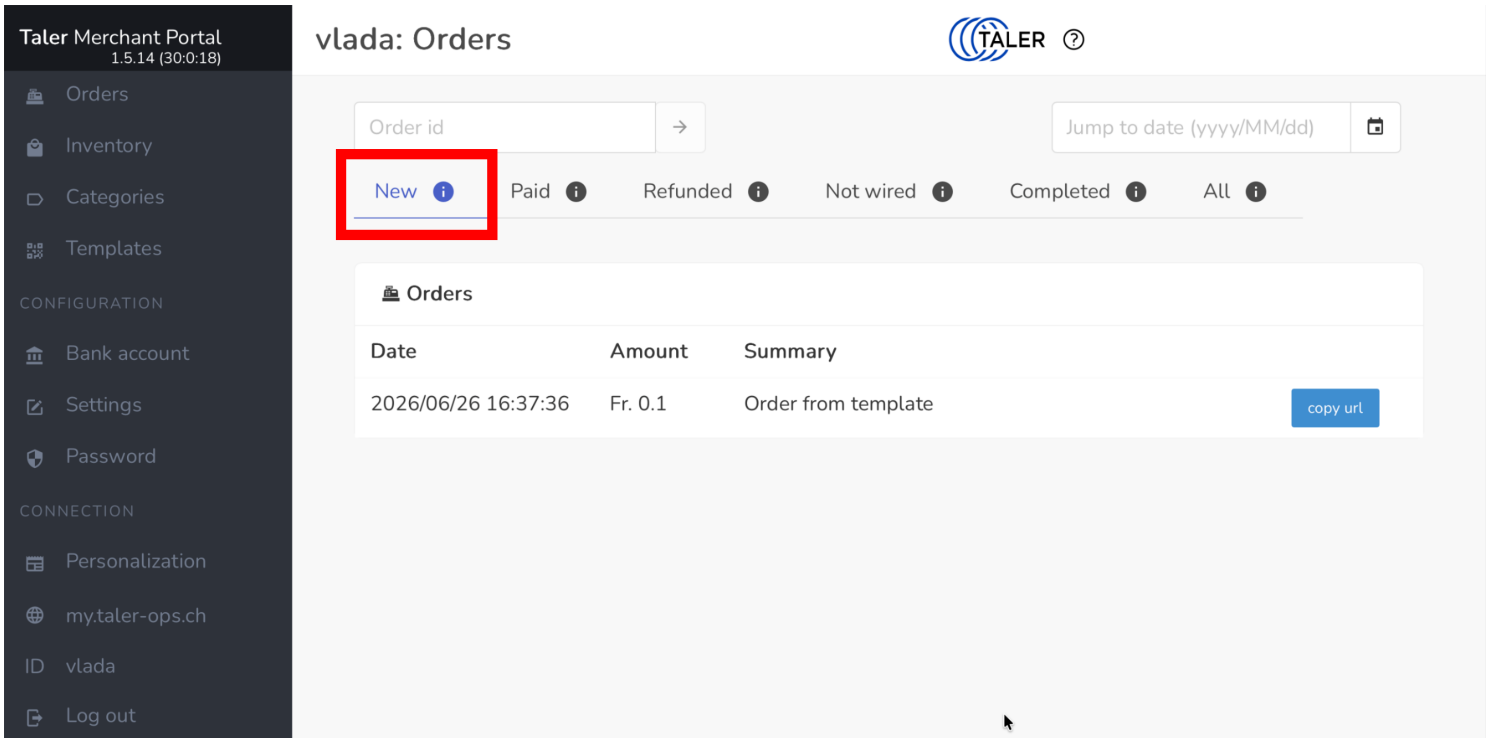
To log in to the Taler Merchant Portal, open my.taler-ops.ch in your browser.

Enter the username and password you used during registration.

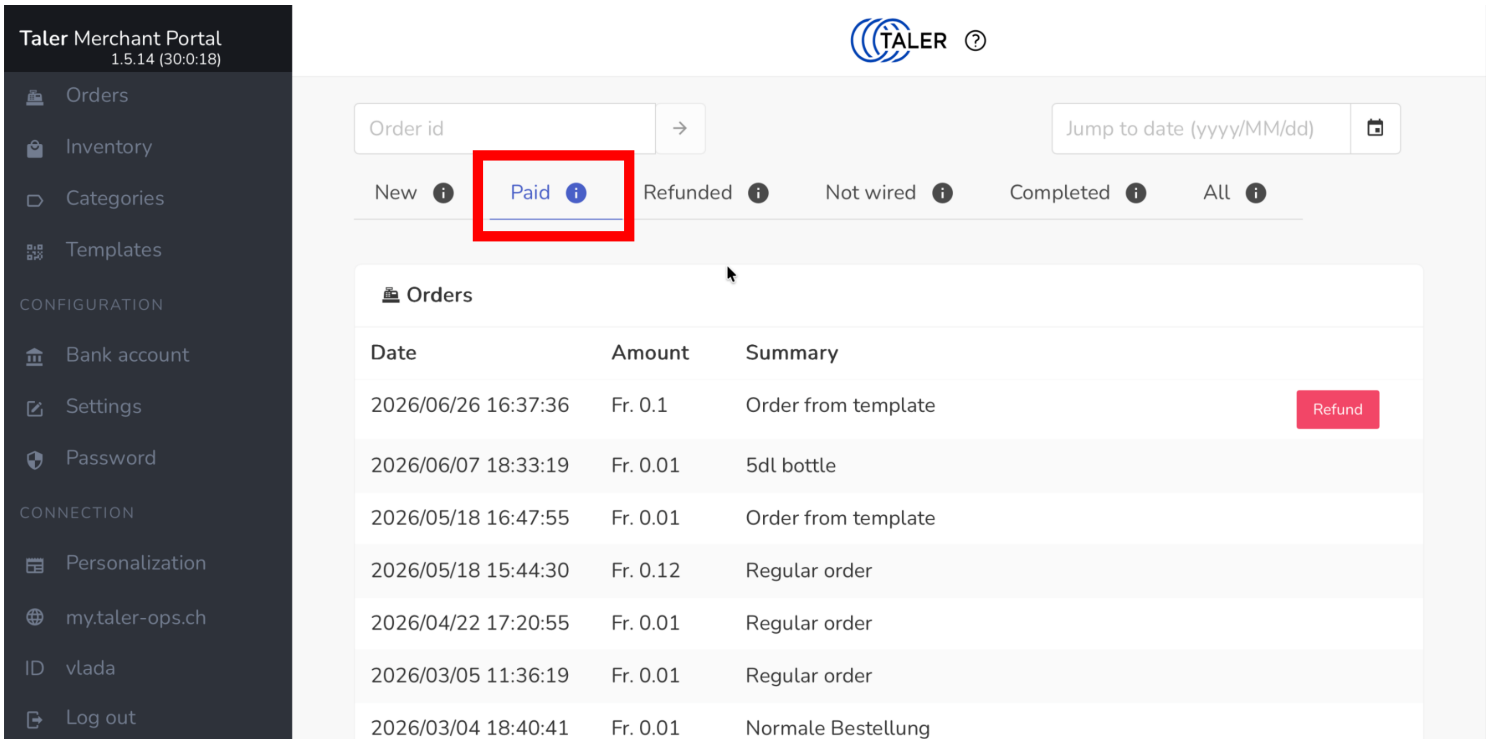
Choose how you want to confirm your login: by receiving a code by email or by SMS. After you receive the code, enter it in the field and click **Verify**.

Order management

When a customer scans the payment QR code and pays for their order, a new order will appear in the Taler Merchant Portal. To view orders, choose **Orders** from the menu. In tab **New**, you can see all the orders that are awaiting payment. Scanning the QR code alone is not enough — the customer must also review and confirm the payment in their Taler Wallet. If the order is still shown as **New**, ask the customer to open their wallet, check whether the payment is still pending, and press **Pay**.



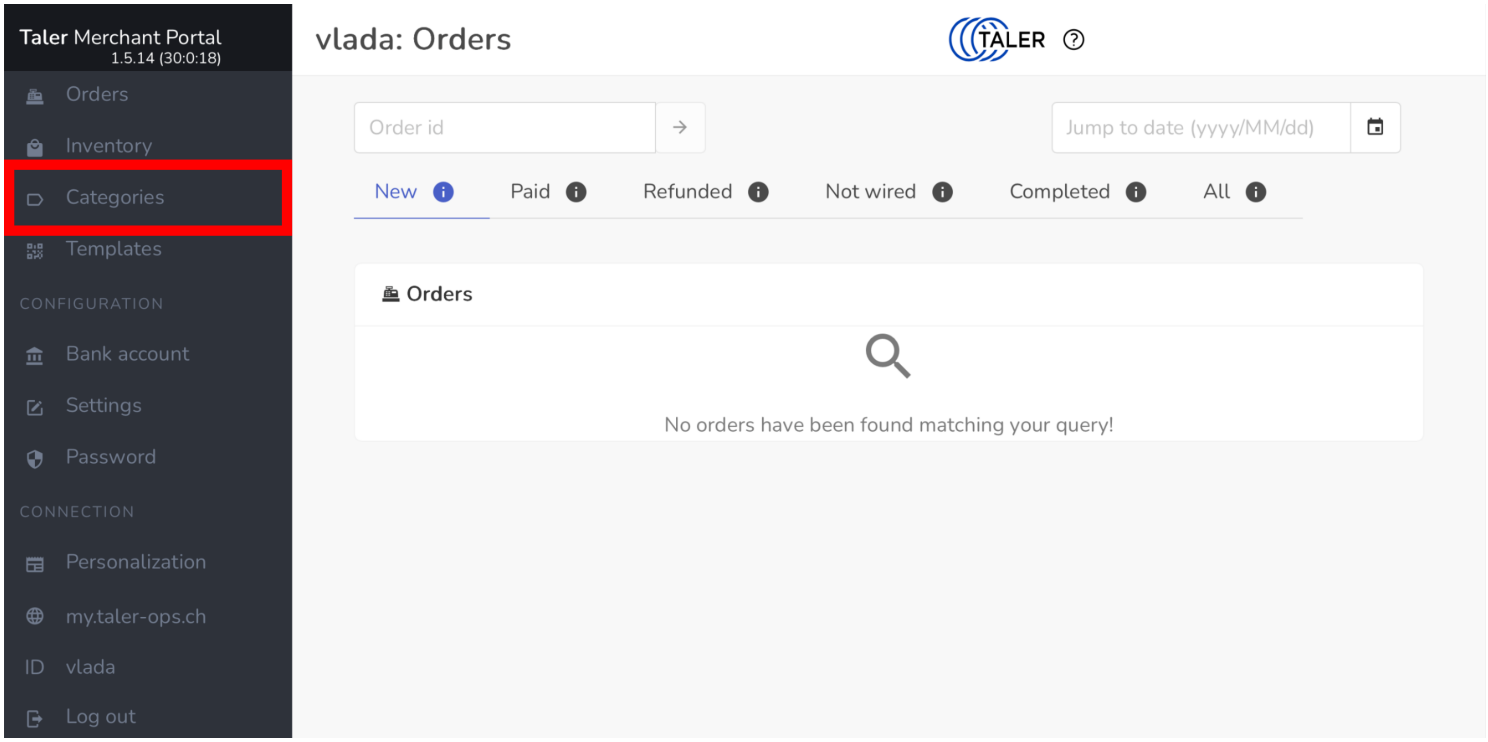
When an order is paid, it moves to the **Paid** tab. You can click the order to view its details.



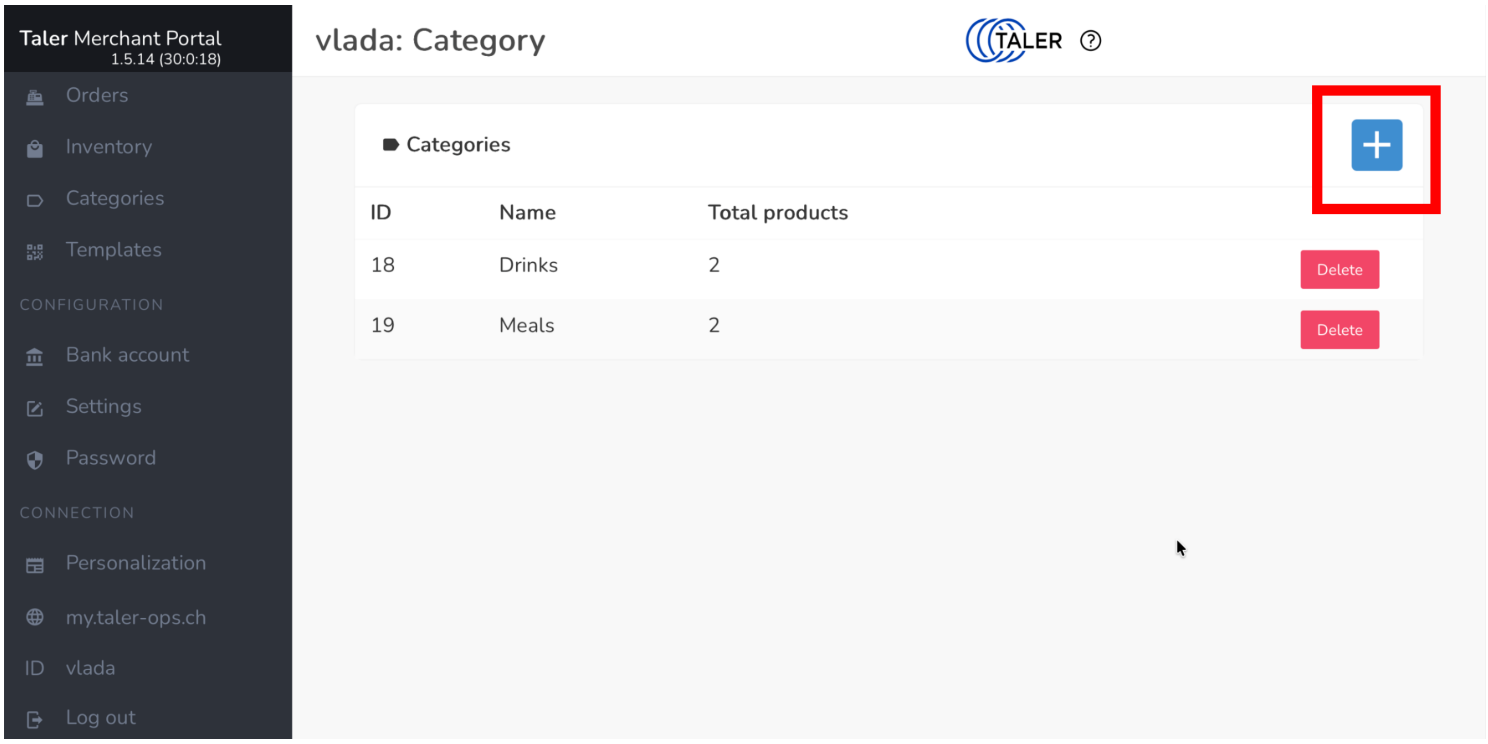
Add categories

Categories are used to group products in the point-of-sale application. If you are not planning to use the point-of-sale application or inventory management, you can skip this step.

Choose **Categories** from the menu.



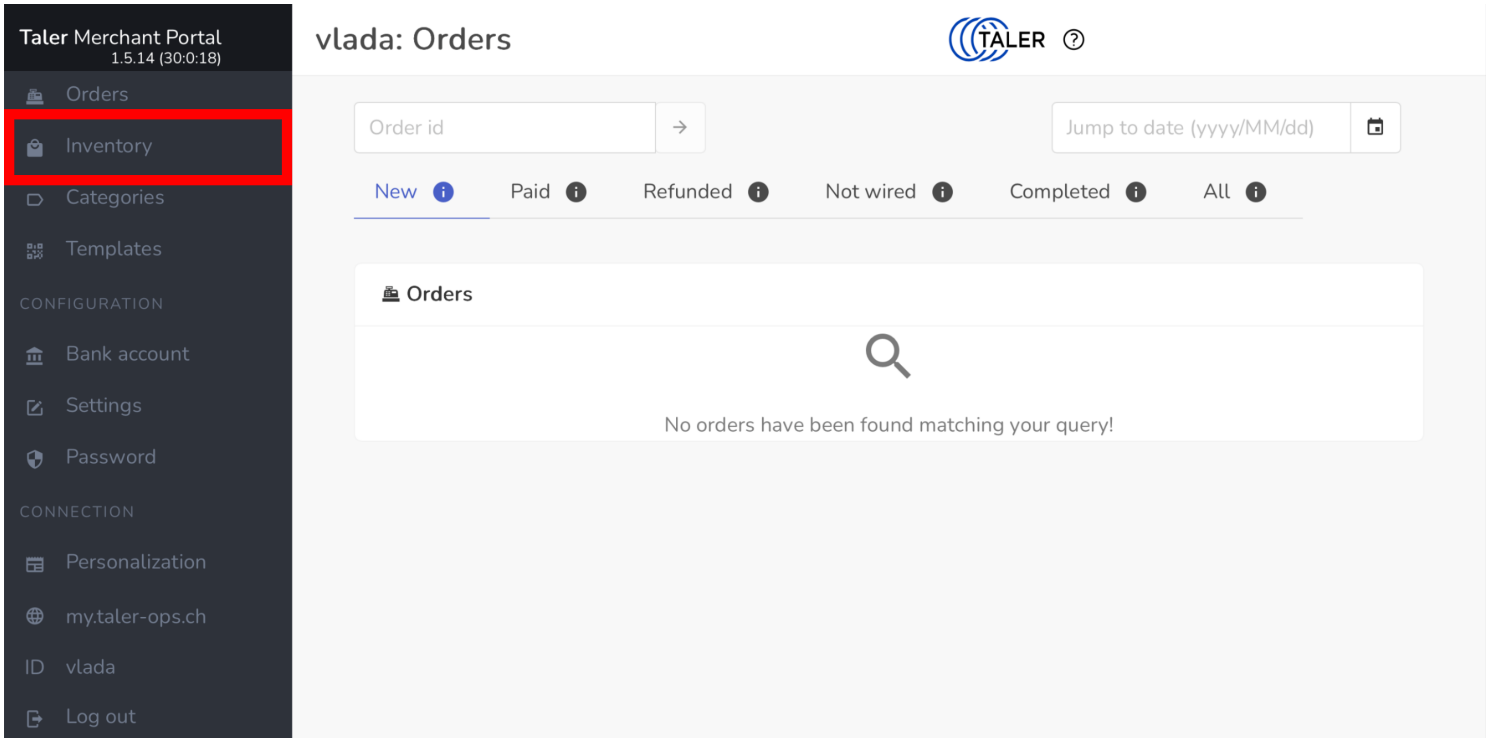
To add a new category, press the + button.



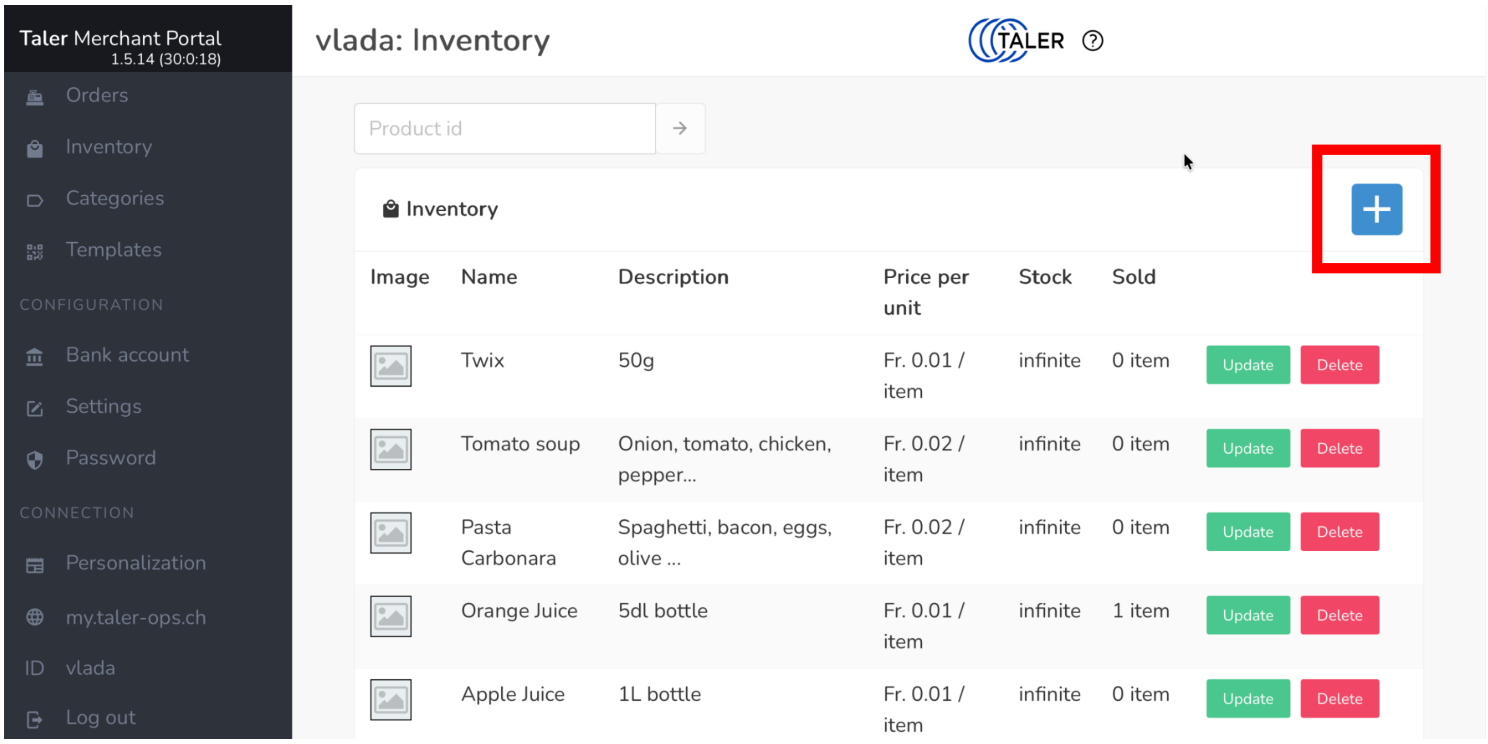
A new page will open. Enter a name for the new category and click **Confirm**.

Add products to inventory

Choose **Inventory** from the menu.

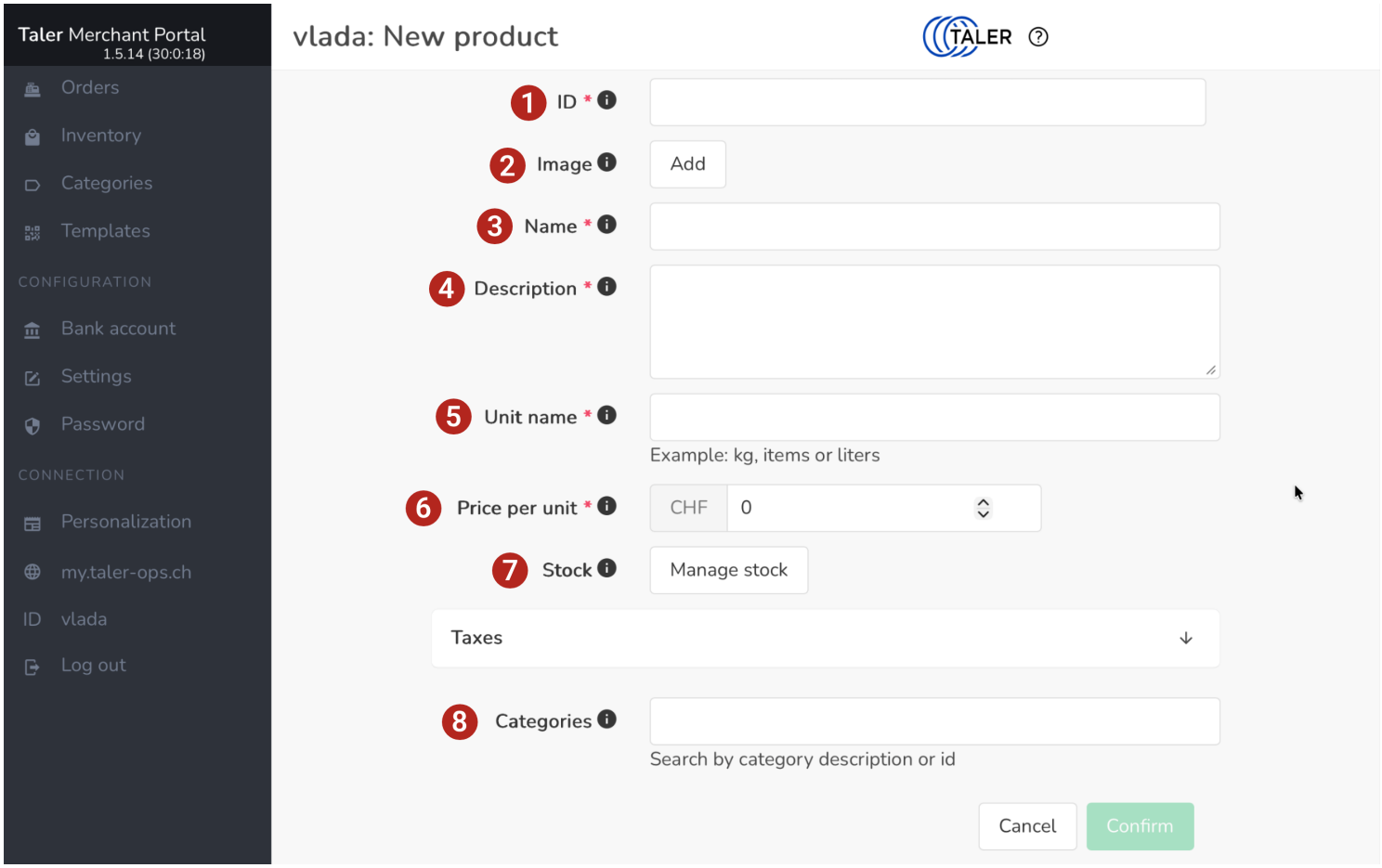


To add a new product, click the + button.



A new page will open. Fill in the following fields:

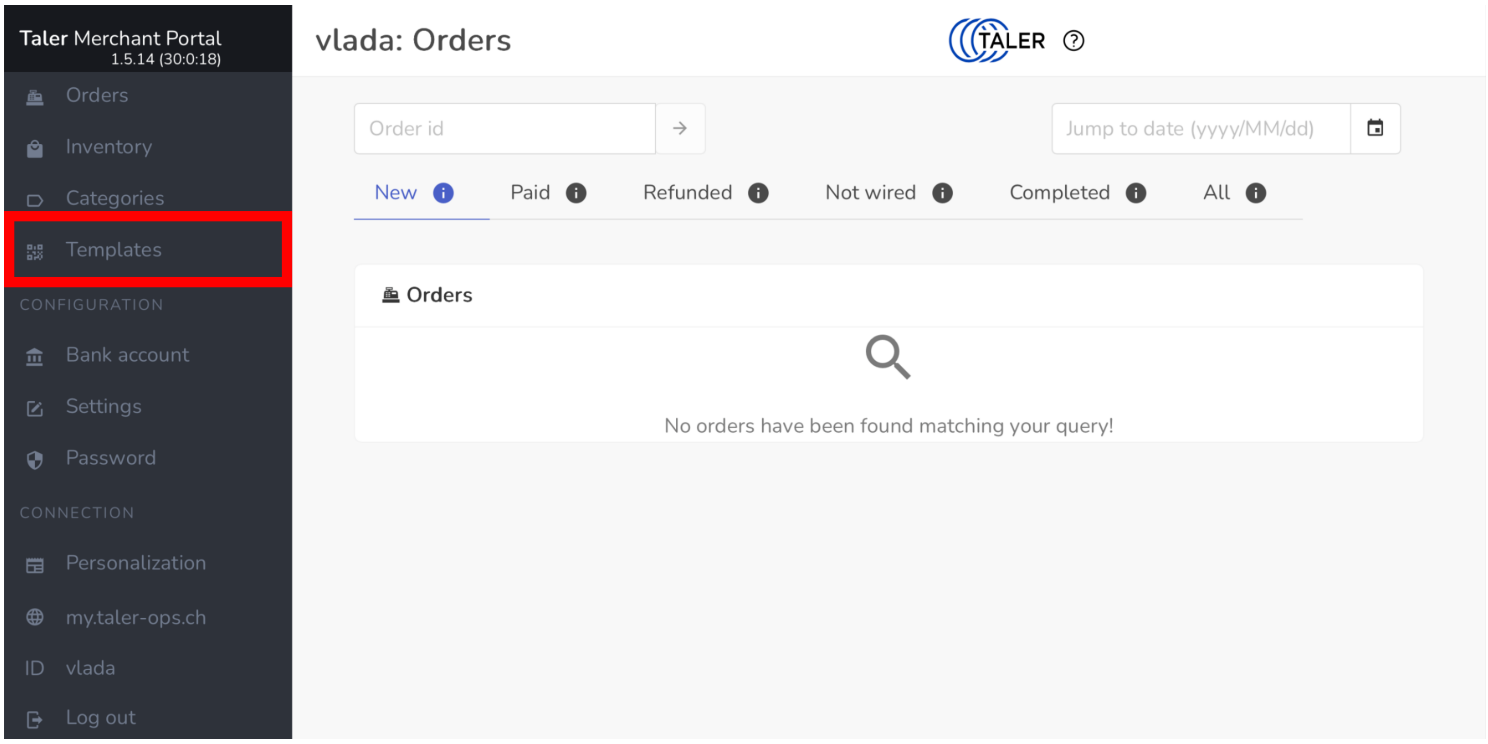
1. **ID** *(mandatory)* – unique identifier for the product. It can be any string, but it must be unique for each product.
2. **Image** – the product image. This will be used in a point-of-sale application.
3. **Name** *(mandatory)* – the product name.
4. **Description** *(mandatory)* – the product description, such as ingredient information for food products.
5. **Unit name** *(mandatory)* – the unit to measure the product, such as “piece”, “kg”, “liter”, etc.
6. **Price per unit** *(mandatory)* – the price of one unit of the product.
7. **Stock** – the number of units currently in stock. Leave this field empty if you do not want to manage stock through the Taler Merchant Portal.
8. **Categories** – assign a product to a specific category(-ies). Categories help organize products in the point-of-sale application.



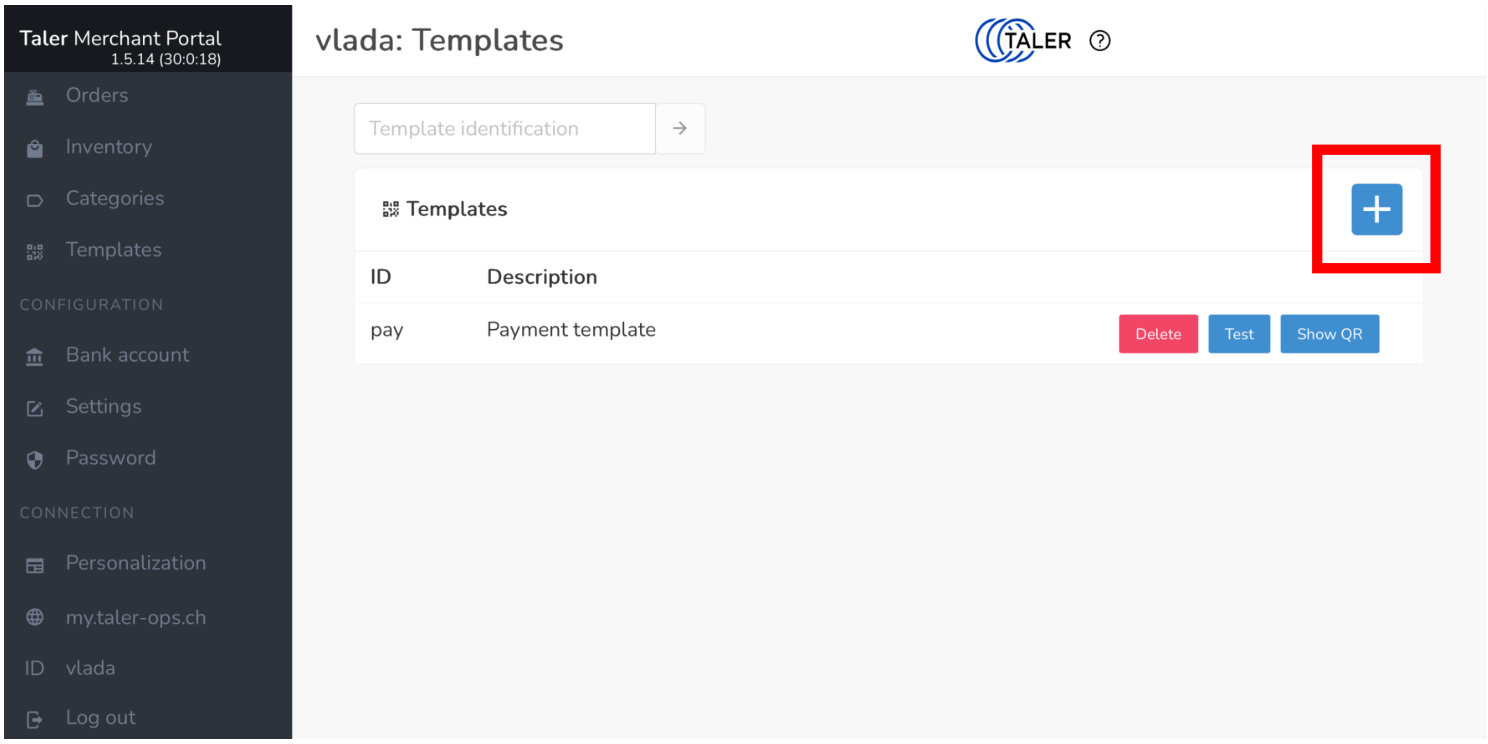
Creating payment QR code

You can create a payment QR code and either print it yourself or request a QR code sticker from us. Customers can scan this QR code to pay for their orders even when your merchant device has no internet connection. The QR code is reusable: each time a customer scans QR code, a new order is created.

Choose **Templates** in the menu.

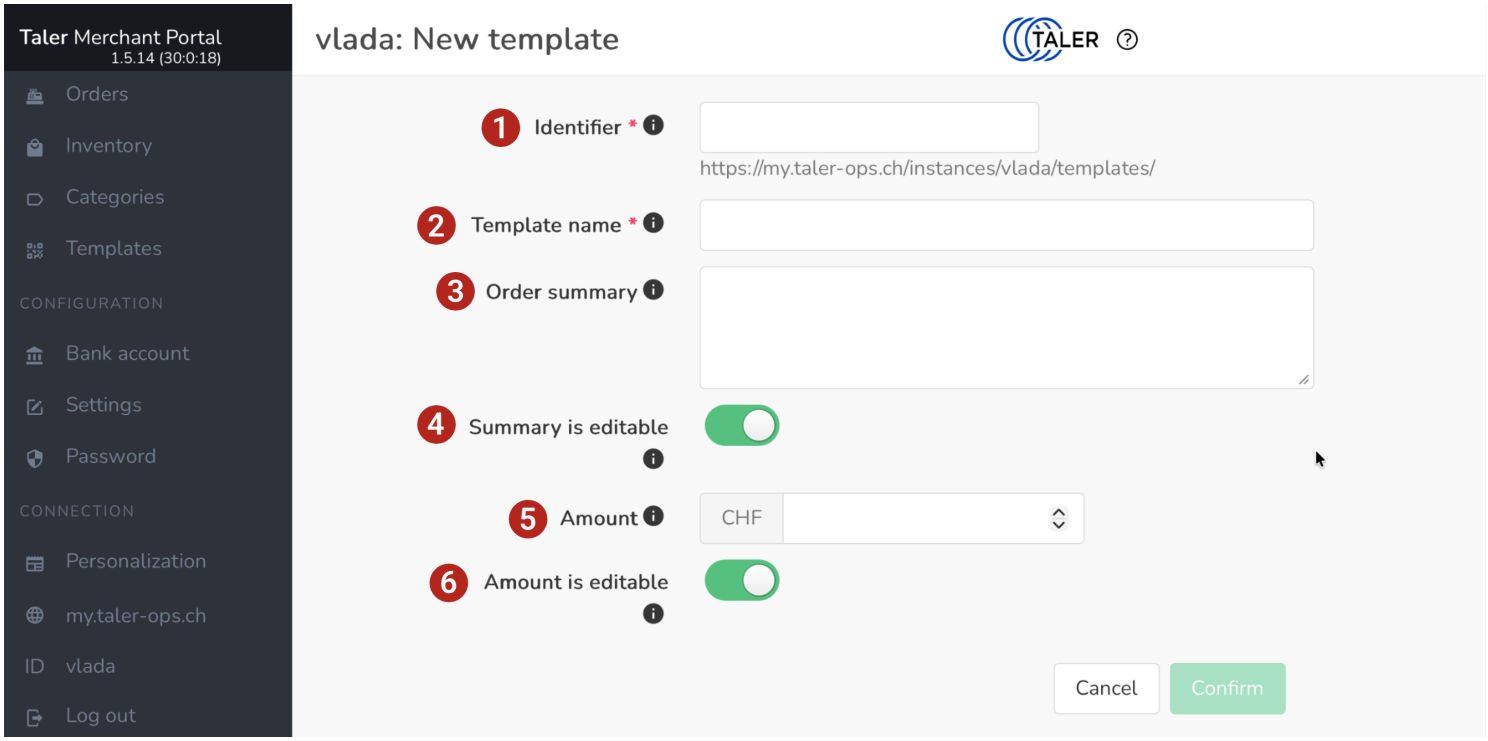


To add a new template, press the + button.

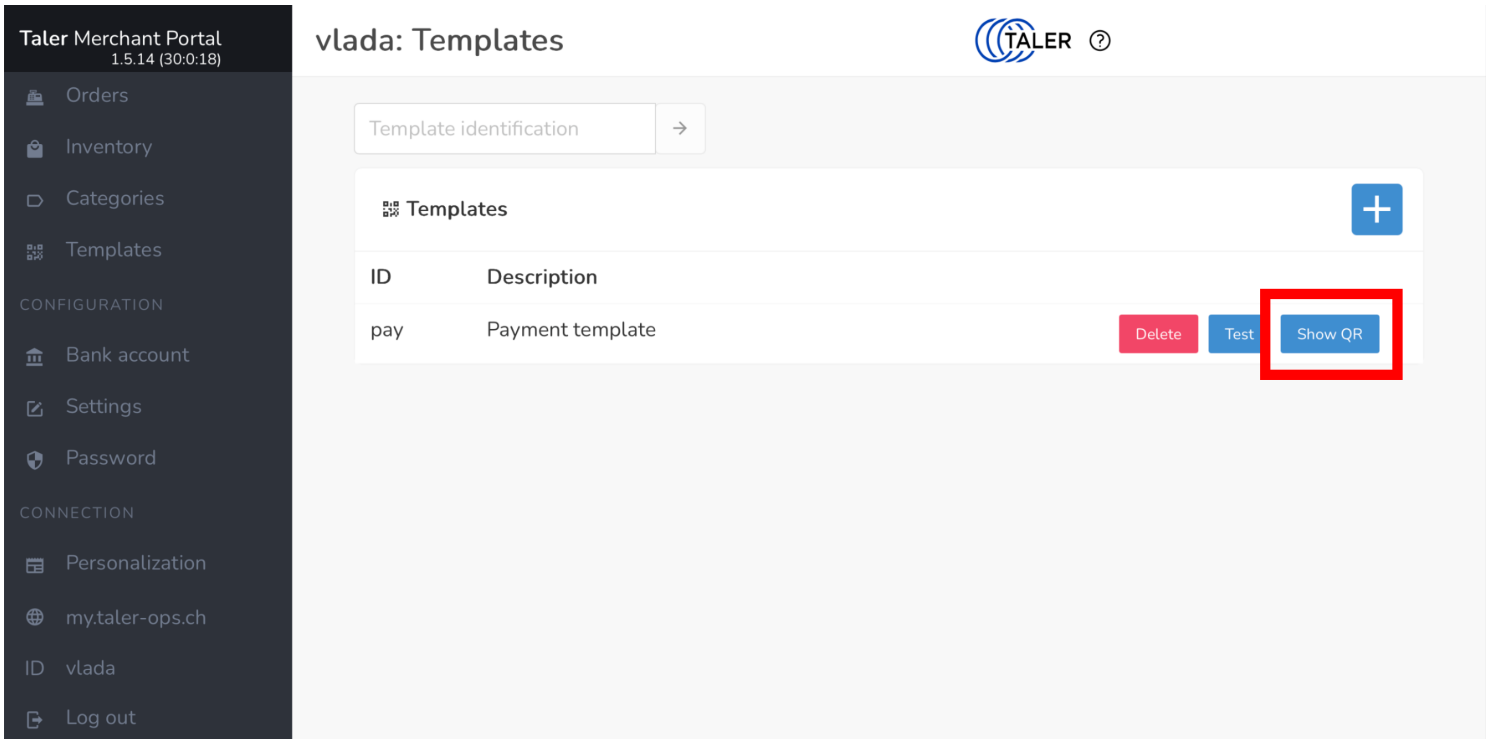


A new page will open. Fill in the following fields:

1. **Identifier** *(mandatory)* – a unique identifier for the template. It can be any string, but it must be unique for each template.
2. **Template name** *(mandatory)* – the name of the template. Only you will see this name.
3. **Order summary** – the text shown to the customer after scanning QR code. This text will also be linked to the order in the Taler Merchant Portal.
4. **Summary is editable** – if this option is enabled, the customer can edit the order summary after scanning the QR code. If it is disabled, the customer cannot edit the order summary, and the text will stay the same as in the template.
5. **Amount** – the amount of money that will be charged to the customer.
6. **Amount is editable** – if this option is enabled, the customer can edit the amount after scanning the QR code. If it is disabled, the customer cannot edit the amount, and the amount will stay the same as in the template.



To print the QR code, click the **Show QR** button on the **Templates** page.



You can also send the QR code to Taler Operation AG by email (print@taler-ops.ch) if you want us to print and deliver stickers with payment QR codes to you.

Point-of-sale Application Instructions

You can download the Point-of-sale application by scanning the QR code below.

Open the POS application and enter the username and password you used during registration on my.taler-ops.ch.

Choose how you want to confirm your login: by receiving a code via email or SMS. After you receive the code, enter it in the field and click **OK**.

Order Creation

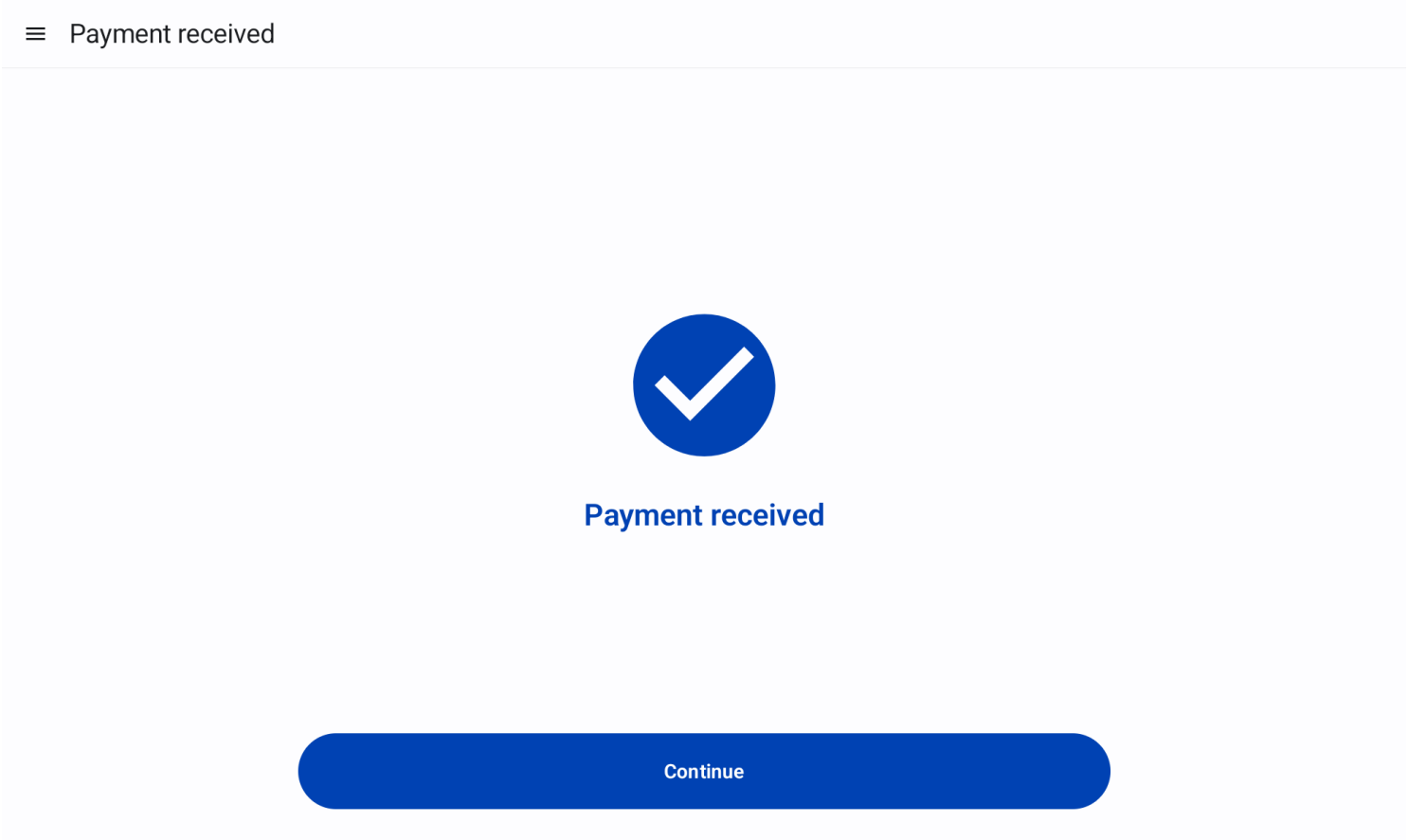
There are two ways to create an order: 1. By amount 2. By selecting products from the inventory

You can switch between the two modes by clicking the burger menu icon in the top left corner and choosing the appropriate option from the menu.

Order by Amount

To create an order by amount, enter the amount and click the **Create order (Charge amount)** button.

Let the customer scan the payment QR code and pay for the order. As soon as the order is paid, you will see the confirmation screen.



Order by Inventory

This option makes sense only if you have added products to the inventory through the Taler Merchant Portal on my.taler-ops.ch.

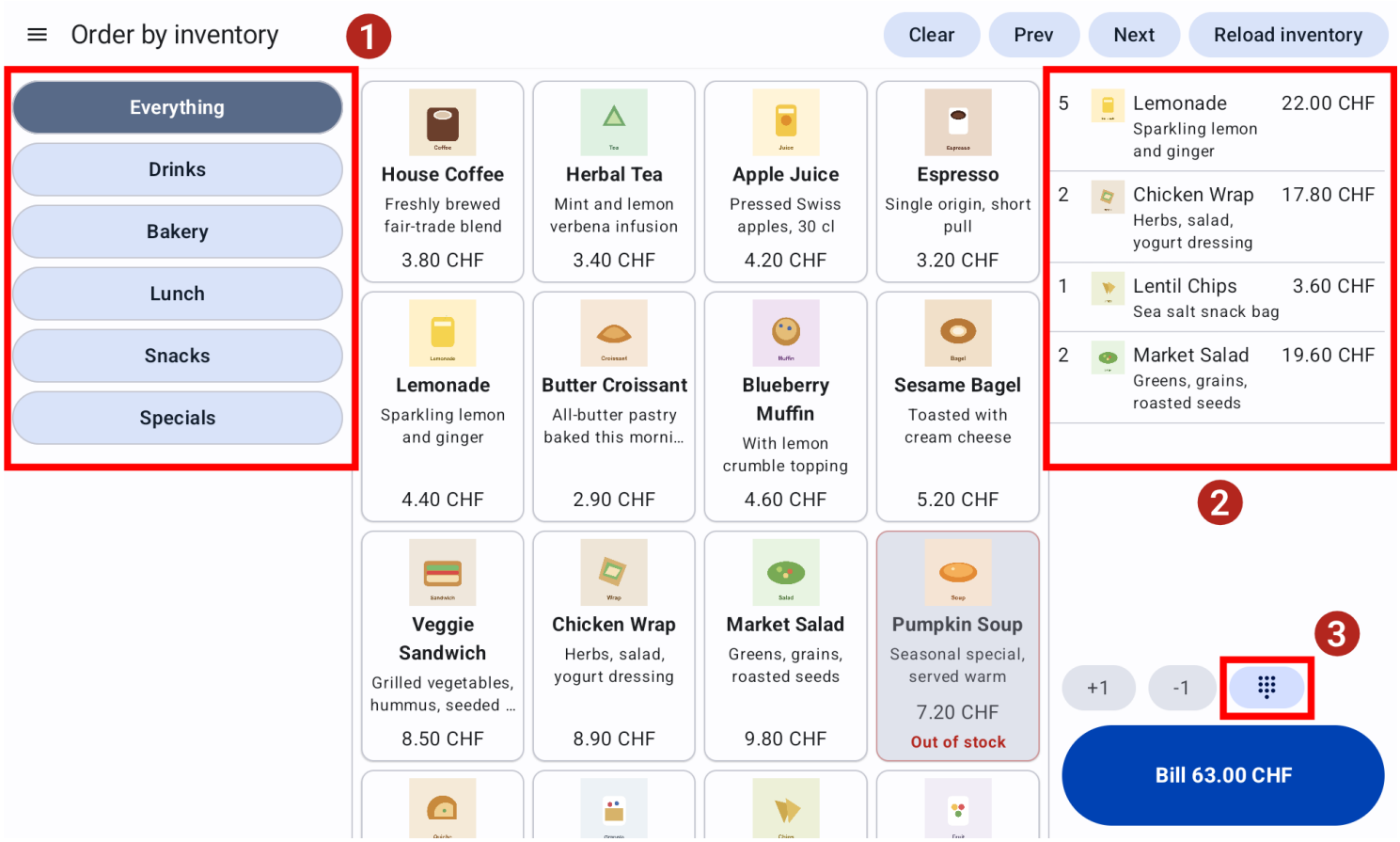
In the middle of the screen, you will see the products.

1. Categories for easier navigation in the inventory
2. Products added to the order, including their quantity and price
3. Button for adding a custom product to the order, such as tips

Buttons in the top right corner:

- Button **"Clear"** clears the current order.
- Buttons **"Prev"** and **"Next"** are used to navigate between unfinished orders.
- Button **"Reload inventory"** updates the inventory with the latest changes from the Taler Merchant Portal.

When the order is finished, click the **"Bill"** button. You will see the payment QR code, which you need to show to the customer.



Order History

To view the order history, click the burger menu icon in the top left corner and choose **History** from the menu.

Here you can see all the orders you have created. There are three types of orders:

1. **Unpaid**: The customer has not completed the payment yet. Scanning the QR code alone is not enough — the customer must also review and confirm the payment in their Taler Wallet. If the order is still shown as **Unpaid**, ask the customer to open their wallet, check whether the payment is still pending, and press **Pay**. By clicking the **"Show payment"** button, you can see the payment QR code again if customer has not scanned QR code, otherwise you will see awaiting payment screen.
2. **Paid**: The customer has paid for the order. By clicking the **"Refund"** button, you can initiate a refund. To collect the refund, the customer has to scan the generated refund QR code.
3. **Refunded**: The customer has collected a refund for the order.