Kiosk Onboarding Playbook

How to configure your Kiosk Portal

This includes the menu you'll display to your customers, logo, screensaver(s) and messages.

Things you require for this guide:

- **SumUp POS Pro account (pos.thegoodtill.com)**
  You should have received an email to activate this shortly after paying for you order

- **SumUp Merchant/Payments account (me.sumup.com)**
  This is the SumUp account used to configure your Kiosk and take payments

Kiosk Portal - Setup Steps

1. Activate Kiosk Portal

2. Connect your POS

3. Rename location & assign POS

4. Configure Price Books (optional)

5. Create your Menu

6. Create a Kiosk Template

7. Create Kiosk Terminal

Step 1

Activate Order & Pay SumUp Portal

This will allow you to start configuring your Kiosk

Activate Order & Pay SumUp Portal

Before you're able to configure your kiosk, click the following link to activate your Kiosk Portal https://portal.orderandpay.sumup.com/welcome

Kiosk Portal *NOT* Activated

The Order & Pay Product Suite

Select the product that you're interested in to get started. You can still add more products later.
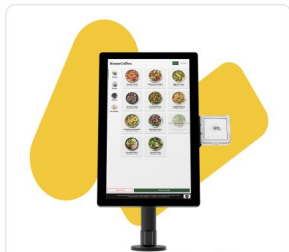
Self-Service Kiosk

Quick self-ordering and payment experiences

- Let your customers self order and free up your staff from order taking
- Increase your average order value by 25-35%
- Cut queues by up to 50% and give your customers great experiences
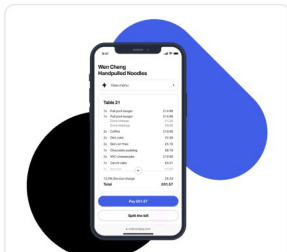
Learn More

Table Pay

Simple contactless table payments with QR code

- Let your customers pay at the table by simply scanning a QR code - no need for an app or account
- Decrease service time at checkout to let your staff focus on orders and customer service
- Increase tips by 15% on average

Learn More

Kiosk Portal Activated

Order & Pay

Overview

Payments

Locations

Connect your POS

Connect your KDS

Price Books

Menus

KIOSK

Kiosk Templates

Items

Learn more about Order and Pay

Book a free session

One of our customer success managers will be happy to support you and make sure you get the most out of SumUp Order & Pay.

Book session

Kiosk Setup
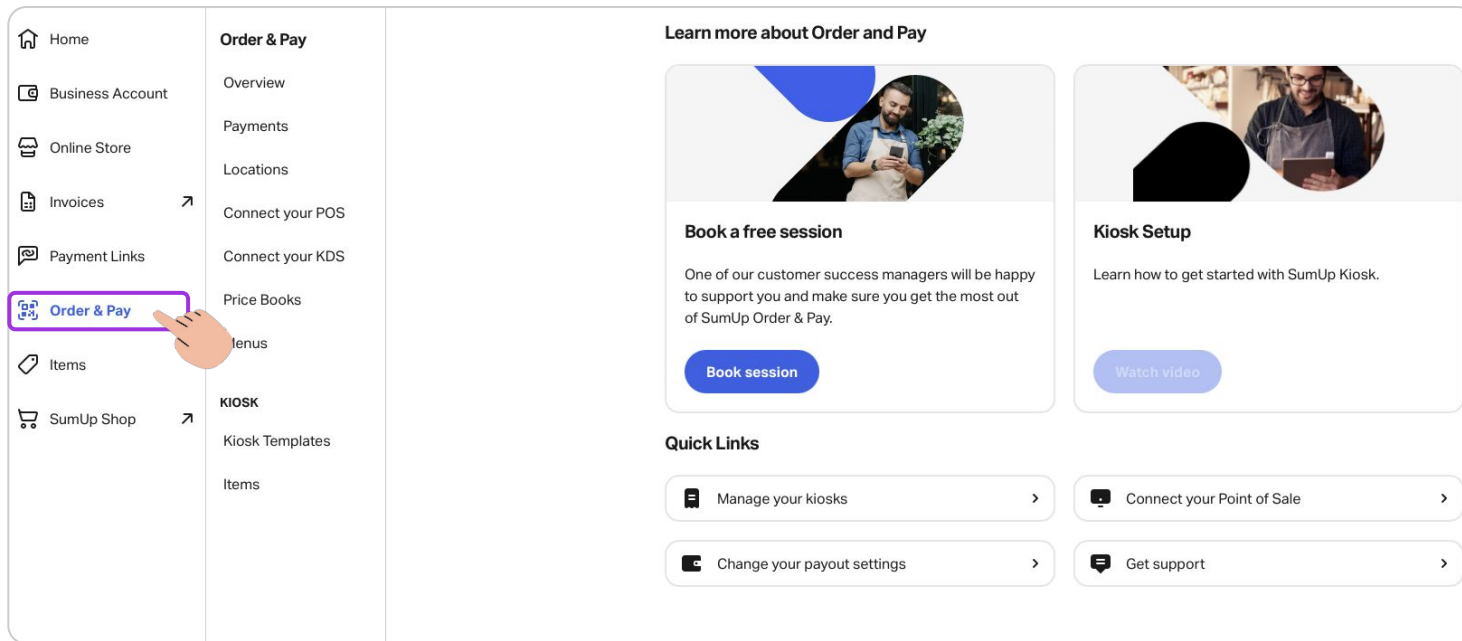
Learn how to get started with SumUp Kiosk.

Watch video

Quick Links

Manage your kiosks >

Change your payout settings >

Connect your Point of Sale >

Get support >

Order & Pay SumUp Portal

Once your Kiosk Portal has been activated, you can follow this link:
https://portal.orderandpay.sumup.com/dashboard or click "Order & Pay"
on the left-hand side of your dashboard

Step 2

Connect your SumUp POS

We use the product data created in your SumUp POS account to set up the menu displayed in the kiosk. To do that, you'll need to connect your POS account to the Kiosk portal.

Connect Your POS

Follow this link https://portal.orderandpay.sumup.com/pos-connections

Connect Your POS

Connect your POS

SumUp Item Catalog

Your SumUp Item Catalog Connection will be automatically created 💡

SumUp (M6TLYCNQ)

SumUp POS Enterprise ⓘ   Add

You have no SumUp POS Enterprise connections. Click on add to create a new connection

Click "Add" to connect your SumUp POS account

Connect Your POS

Connect your POS

SumUp Item Catalog

SumUp (M6TLYCNQ)

SumUp POS Enterprise ⓘ [Add]

You have no SumUp POS Enterprise connections. Click on add to create a new connection

As part of your Kiosk, you'll also be given a SumUp POS account to add your products, product images, variants and/or modifiers. ❗

Log in to SumUp POS

Subdomain

Subdomain

Username

Username

Password

Password

[**Login**]

If you don't have access to your SumUp POS login or have forgotten the password, you can go to https://pos.thegoodtill.com and reset your password. 🔒

Step 3

Rename Location & assign POS Connection

Rename the Default Location & Assign POS Connection

Follow this link https://portal.orderandpay.sumup.com/locations

Rename the Default Location & Assign POS Connection

Locations

Add new

Default location   >

Locations allow you to add and configure terminals in one or multiple locations, in case you have more than one.

A "Default Location" is created with the account, in which you can add the necessary terminals.

The location can be renamed after your site's physical location, such as "London Shop".

Rename the Default Location and assign the POS connection

Location

Name *

Default location

Menu URL

e.g. https://example.com/menu.pdf

POS connection

POS connection *

Order & Pay - Developer Outlet

Order & Pay - Developer Outlet

SumUp (M6TLYCNQ)

There are no terminals configured. Click the Add terminal button create one.

Save

1 **Rename your location.** Could be the name of your business.

Menu URL 🔍
Please skip this.

2 **POS Connection**
It will default to using your SumUp account, but you'll need to switch it to the SumUp POS you've just linked.

3 **Save**

Step 4

Configure your Price Books

This allows you to set up Eat in and Takeaway

Configure your Price Books

If you don't offer both Eat in and Take Away, please skip this step.

Follow this link https://portal.orderandpay.sumup.com/price-books

Configure your Price Books

Price books allow your customers to order for *Eat in* & *Take away* or *Now* & *Later*.

Editing Default Price Book

Price Books

Add new

Default
DEFAULT

Your Default Price Book can renamed 💡

Update Price Book   ✕

Name

Eat In

Cancel   Update

Configure your Price Books

To add a Takeaway option, you'll need to add a new Price Book and name it "Takeaway" or similar
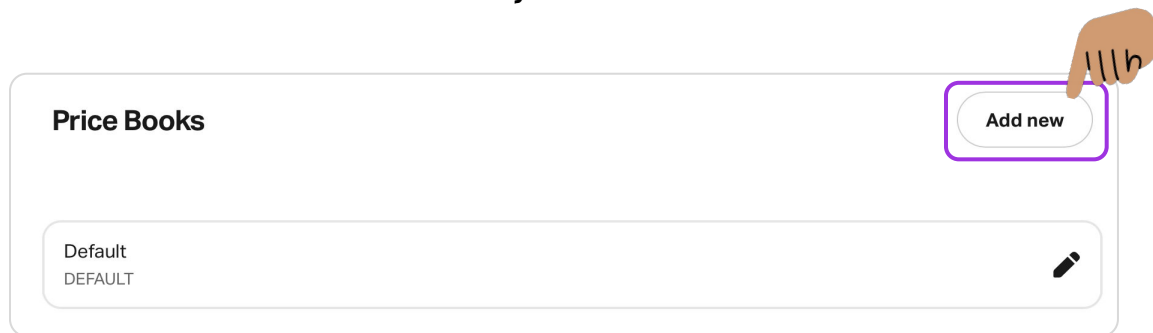
You can only have up to 2 Price Books, including the default one 💡

Price Books   Add new

Default
DEFAULT

Create Price Book   ✕

Name *

Takeaway

Cancel   Create
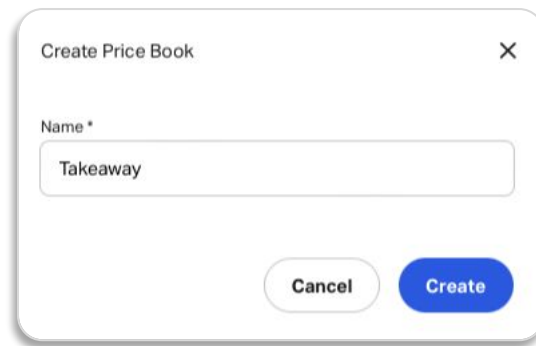
Once created, you'll have two Price Books. Continue with the guide to see the next steps.

Eat in
DEFAULT

Takeaway
TAKEAWAY
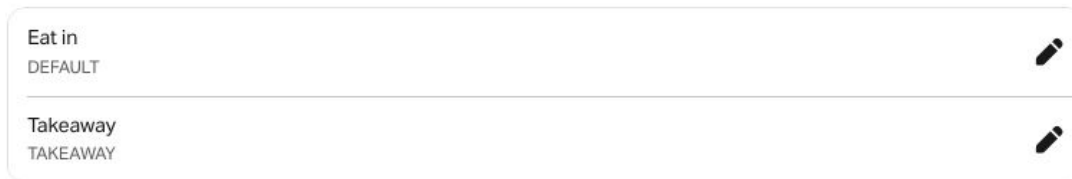
Step 5

Create your Menu

Using the products from your POS, you can configure the menu that will be displayed to your customers

Create your Menu

Follow this link https://portal.orderandpay.sumup.com/screen-layouts

Create your Menu

Menus — Add new

There are no menus configured. Click the Add new button create one.
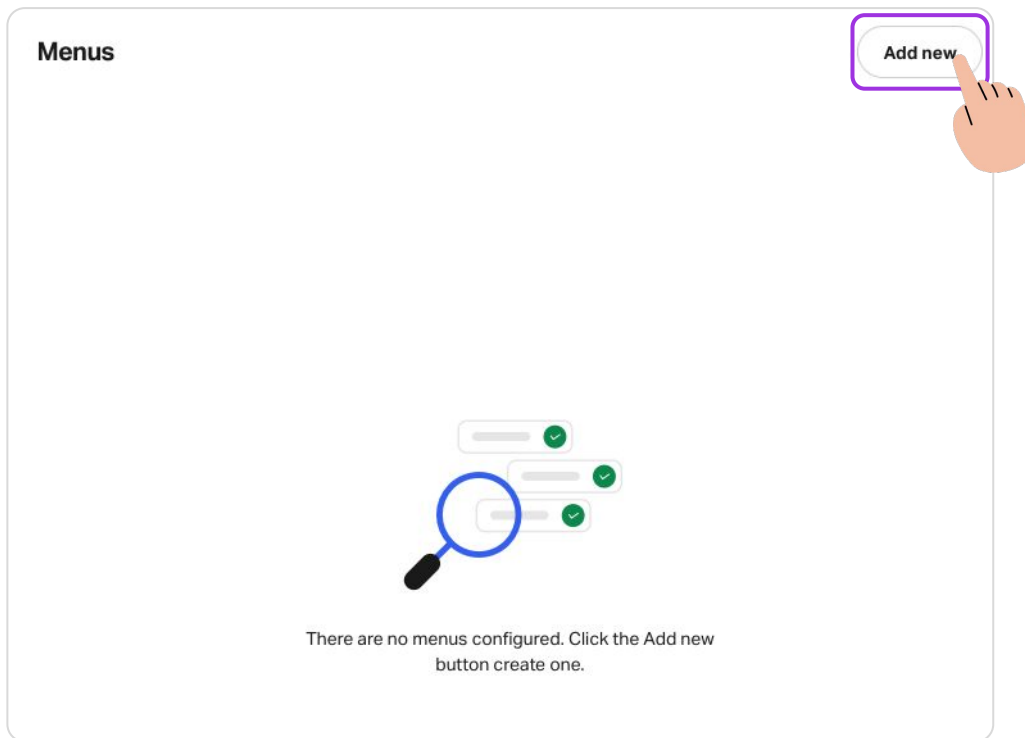
The Menu is used to create the list of products displayed on your kiosk. A Menu is composed by "Sections" e.g. Hot Drinks, Soft Drinks, Breakfast, etc. You can then add the necessary items to each one of your Sections.

You have the ability to create multiple Menus and, depending on how your business operates, you can use the ***scheduled menus**** feature to automatically change layouts at specific times. For example, you can have a Layout for Breakfast and another one for Lunch & Dinner.

*Email kiosksupport@sumup.com to enable this feature

Create your Menu

Menu designer

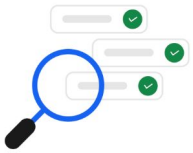There are no sections created yet, start by creating one using the side navigation

Save

Menu Details

Menu Name *

Daytime **1**

Thumbnail ⓘ

2

Location for Menu *

Select

3 **Save Details**

1 **Give your layout a name**

Menu Thumbnail 🔍
This is only relevant if you are using the Multi-brand feature

2 **Select the Location this menu will belong to**

3 **Save Details**

Create your Menu

Menu designer

There are no sections created yet, start by creating one using the side navigation

Save

Menu Details

Menu Name *

Day

Thumbnail ⓘ

Location for Menu *

Default location

Save Details

Create Section

Section Name *

Burgers ①

Thumbnail ⓘ

② Close Create ③

① **Create your first Section** e.g. "Hot Drinks"

② **Add an image to identify your Section.** If you don't add a Section thumbnail, it will use the image of the 1st item with an image within the Section.

③ **Click "Create" to save the new Section**

Create your Menu

Menu designer

Drag and drop to re-order your sections and products

Sections

⠿ 🖼 Hot Drinks ✏️ 🗑

Add new section

Save

Menu Details

Menu Name *

Day

Thumbnail ⓘ

🖼
➕

Location for Menu *

Default location ▾

Save Details

Add new item

Section to add product to *

Select ▾ ①

Product *

Select ▾ ②

③ **Add Item**

---

① **Select the Section to add the products**

② **Select the desired product. The options will be pulled from the specified Location chosen for the Menu**

③ **Click "Add Item"**

Create your Menu

Menu designer

Drag and drop to re-order your sections and products

Sections

Coffee — **Sections**

Products in "Coffee" section

Americano

Latte — **Items**

Flat White

Pastries — **Sections**

Products in "Pastries" section

Pain au Chocolat — **Items**

Save

Menu Details

Menu Name *

Day

Thumbnail

Location for Menu *

Default location

Save Details

Add new item

Section to add product to *

Select

Product *

Select

Add Item

When you have finished creating your Sections and adding the products you want to display in your Kiosk, **save your Menu!**

Step 6

Create your Kiosk Template

This is where previous steps come together and where you add your logo, screensaver

Create your Kiosk Template

Follow this link https://portal.orderandpay.sumup.com/terminal-templates

Create your Kiosk Template

Terminal Templates

Add new

There are no terminal templates. Click the Add new button create one.

A Terminal Template allows you to configure the appearance of your kiosk and how your customers interact with it by:
- Uploading logo
- Uploading screensaver
- Changing colours
- Changing customer messages

Create your Kiosk Template

Details

Name *

Enter your Kiosk Template name

Accessibility

⬤ Show accessibility controls
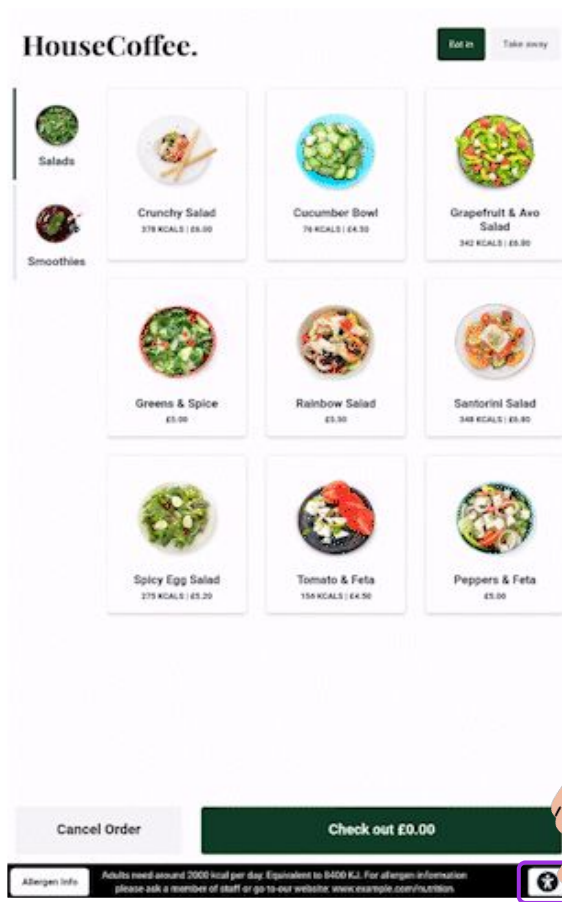
Security

Operator Pin *

Create your Kiosk Template

Accessibility

🔵 Show accessibility controls

Enable/Disable Accessibility Control Icon

Accessibility mode feature facilitates the use of the kiosk by halving the screen when activated

Create your Kiosk Template

Security

Operator Pin *

[1] [input field] 👁

ALLOWED SUMUP MERCHANT IDS

SumUp merchant ID 1

[2] 🗑 [input field]

Add Merchant Id

1 **Set up an Operator Pin**
The operator Pin provides access to the kiosk configuration screen and is necessary for actions such as deactivating the Kiosk or log out of the account. ***Has to be a minimum of 6 digits/numbers. For example: 123456**

2 **Add your Merchant ID**
If you have multiple accounts, please use the one used to activate your Kiosk Portal

Create your Kiosk Template

Menus

Select the Menu you created
See below, how the menu designer would translate to the Kiosk

32

Create your Kiosk Template

ALLOWED SUMUP MERCHANT IDS

SumUp Merchant Id: 1

🗑

Add Merchant Id

Menus

London Shop ✕

Price Books

Eat in ✕   Takeaway ✕

UPSELL PRICE BOOK

○ Enable Upsell Price Book

Order Reference

COLLECTION CODE

What format would you like your collection code to use?

Select

Select your Price Book

Allow your customers to choose between two different price books e.g. **Eat in** & **Takeaway**

Create your Kiosk Template

Order Reference

COLLECTION CODE

What format would you like your collection code to use?

Select	⌄

Generated short code [ABC132]

Number sequence [001 - 999]

Order Complete

Order reference #B648W3

Thank you for using SumUp Kiosk!

Order Complete

Order reference #006

Thank you for using SumUp Kiosk!

Setup your Custom Order Reference
Choose between having the orders references to be created as a *number sequence* or having a *generated short code* consisting of letters and numbers

Create your Kiosk Template

Appearance

Logo * ⓘ

Your logo can be square or rectangular. It's ideal to have a transparent background,

seCo

Checkout banner (6:1 Aspect Ratio) ⓘ

Aspect ratio of 6:1 (e.g. 1200 pixels wide, 200 pixels high)💡

SCREENSAVERS

Screen save image 1 ⓘ

Width = 1080 pixels
Height = 1920 pixels
Format = JPEG/PNG/GIF

Max size of 10MB

Add screensaver

Create your Kiosk Template

COLOURS

Accent colour
1 — Highlights the selected section/category

Primary text colour
2 — Any text inside the primary colour buttons

Text
3 — Any text outside the primary colour buttons, except warning texts

Primary colour
4 — Affects the main call-to-action buttons

Background colour
5 — Background for pages outside of the menu. Not having a screensaver will display the background colour

Warning text colour
6 — Mainly affects the "Cancel" button when adding products

TOUCH TO START PROMPT
Show start button on splash screen

Create your Kiosk Template

Localisation

Currency *

(1) GBP ⌄

Default locale *

(2) en-GB ⌄

Customer Messages * **(3)**

Global message text *

(1) [   ]

Order confirmation text *

(2) [   ]

(1) Select your Currency *(Defaults to GBP)*

(2) Select your Language *(Defaults to British English)*

(3) Customize your messages for your Client

Order Complete

Order reference #005

Thank you for using SumUp Kiosk! **(2)**

Tap to start new order

(1) Adults need around 2000 kcal per day. Equivalent to 8400 KJ. For allergen information please ask a member of staff or go to our website: www.example.com/nutrition
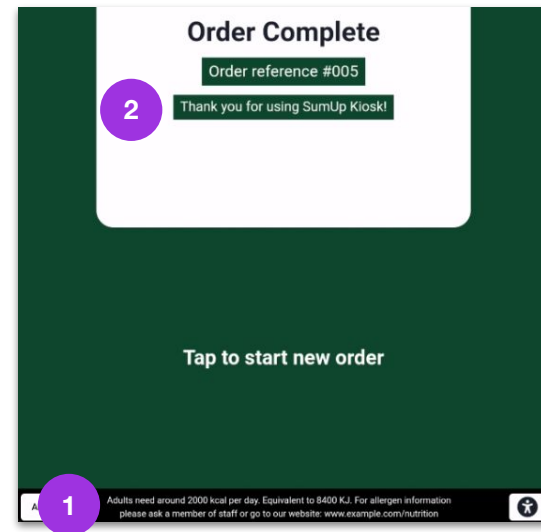
Create your Kiosk Template

Receipt

(1) 🔵 Enable printing

(2) ⚪ Use digital collection slips
This will show a QR on the completion screen which links to the digital collection slip

(3) ⚪ Show prices

Receipt header text

> You could use this to display your business address at the top💡

Additional receipt text

> You could use this to put a nice message such as "Thank you for supporting us" or contact information💡

---

(1) **Enable Printing**
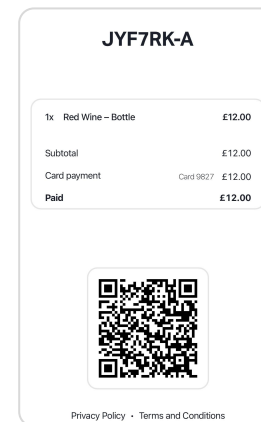For physical receipts a **Star Micronics mC-Print3** printer can be connected to the Kiosk. Otherwise, please **disable**.

(2) **Show prices**
Enable "Show prices" to add item prices to your physical receipts. Leave disabled if you don't have a printer.

(3) **Use digital collection slips**
Enable "use digital collection slips" for digital receipts. The QR code will direct the customer to page with their order details. See example below.

JYF7RK-A

1x Red Wine – Bottle		£12.00
Subtotal		£12.00
Card payment	Card 9827	£12.00
Paid		**£12.00**

Privacy Policy · Terms and Conditions

Create your Kiosk Template

KDS Connection

Connection

No KDS or use POS KDS ⌄

Optional Add On

If you have signed up for SumUp KDS, we will create this for you.

Save

You are now finished, go ahead and save your Kiosk Template ✓

Step 7

Create a Kiosk Terminal within your location

Go Back to Locations

Order & Pay

Overview

Payments

Locations

Connect your POS

Connect your KDS

Price Books

Menus

KIOSK

Kiosk Templates

Items

Learn more about Order and Pay

Book a free session

One of our customer success managers will be happy to support you and make sure you get the most out of SumUp Order & Pay.

Book session

Kiosk Setup

Learn how to get started with SumUp Kiosk.

Watch video

Quick Links

Manage your kiosks >

Change your payout settings >

Connect your Point of Sale >

Get support >

Select Your Location

Locations

Default location   ›

Create your Kiosk Template

Terminals

1 **Add terminal**

There are no terminals configured. Click t
terminal button create one.

Create terminal ✕

Name *

2

Kiosk Template *

3 Select ⌄

Cancel **Create**

1 Select "Add terminal"

2 Give it a name, such as "London Kiosk 1"

3 Assign the Kiosk Template you created and click "Create"

There's no need to click **Save**, it'll save automatically.