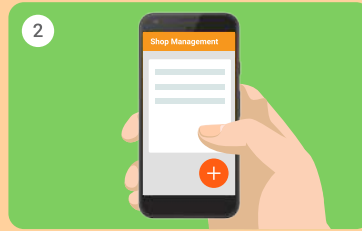# Octopus App for Business – Quick Guide

Shop Owner Mode

(A) Manage Shop Records

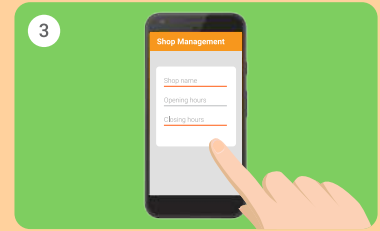Shop Owner can add, edit or remove the shop records, anytime.

1 Select "Shop Management" in the main menu.
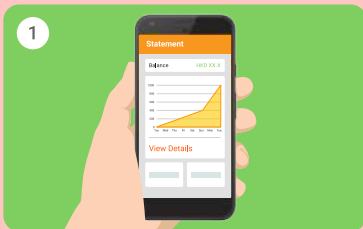
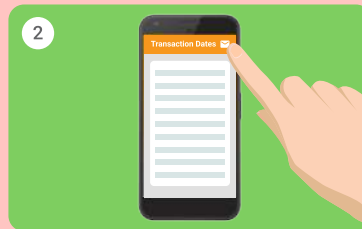**2** Press "+" to add a new shop.

3 Input shop name, opening and closing hours, to create a shop record.
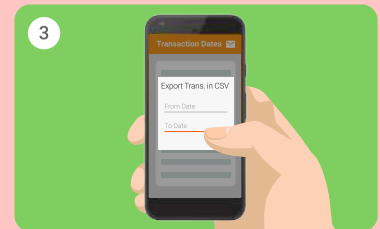
(B) Export Transactions Report

Shop Owner can view the account balance, transaction details and export the transactions report anytime.


1 Select "View Details" in the main menu.

2 All the transactions will be listed by dates. Tap the " ✉ " icon at the top right corner.

3 You will be prompted to input the date range, to export the transactions report in .CSV format.

(C) Instantly Transfer Money Received to Bank Account with "FPS"

Octopus App for Business is now connected to Faster Payment Service (FPS). Shop Owner can instantly transfer the money in the account to the pre-registered bank account, on a 24/7 basis.
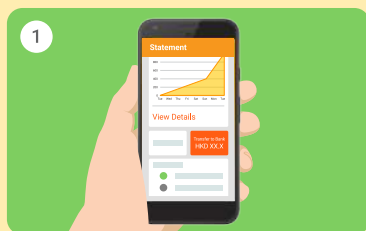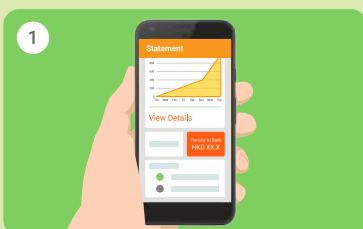

1 Select "Transfer To Bank" in the main menu.
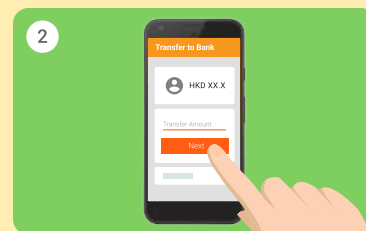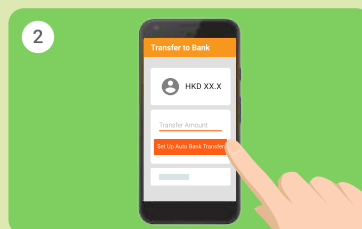
2 Input the "Transfer Amount" and press "NEXT" to proceed.

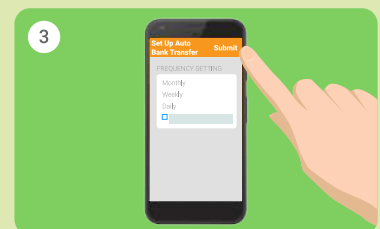## (D) Set up "Auto Bank Transfer"

Shop Owner can set up the "Auto Bank Transfer" to automatically transfer all the balances in their accounts to the pre-registered bank accounts - monthly, weekly or daily. This saves considerable time in managing the account.

1 Select "Transfer to Bank" in the main menu.
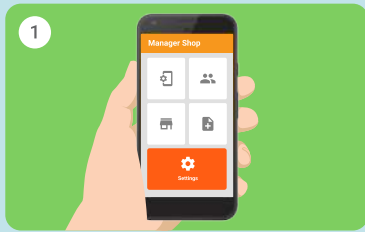
2 Select "Set Up Auto Bank Transfer".
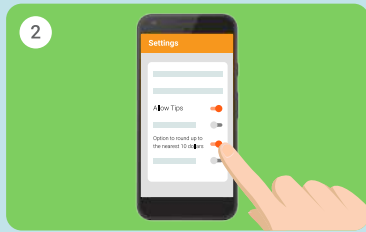
3 Set up the frequency and then press "Submit".

(E) Allow Tips

Shop Owner can enable a tips option.

Octopus App for Business interface

Customer's Octopus App interface

1

Manager Shop

Settings

Select "Settings" in the main menu.

2

Settings

Allow Tips

Option to round up to the nearest 10 dollars

Enable "Allow Tips", and select the payment amount round-up options to either the nearest dollar or 10 dollars.

QR Code with payment amount

Payment

Select payment amount:
HKD XX.X
HKD XX.X
Other amount
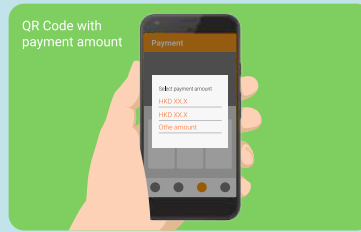
Customers will be prompted to select the payment amount options with exact amount, amount with tips, or other amount for them to input.

QR Code without payment amount
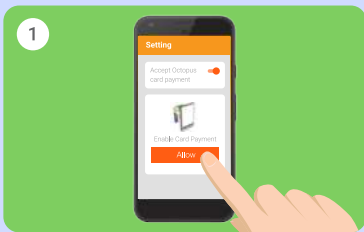
Payment

Input total payment amount
HKD XX.X
Confirm
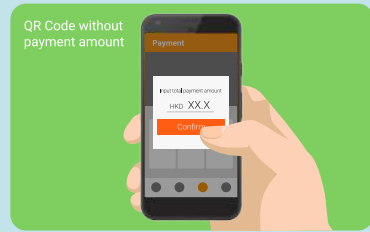
A message "Tips are welcome" will be shown, to remind customers they can include tips in the total payment amount.

Cashier Mode

(A) Enable Octopus Card Payment Acceptance Function

* NFC-enabled Android devices (v4.4 or above)/ iPhone 7 or newer with iOS 13 or above.

If the mobile device is an NFC-enabled supporting Octopus card tapping service*, the Octopus card payment function can be enabled at Cashier Mode, to receive payments from customers by Octopus card.

1

Setting

Accept Octopus card payment

Enable Card Payment

Allow

Enable "Accept Octopus card payment" in "Settings", and allow "location and motion detection permission".

2

八達通 Octopus
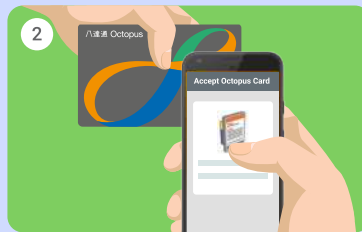
Accept Octopus Card

Place the Octopus card at the NFC area of your mobile device until the "success" message is shown.

3

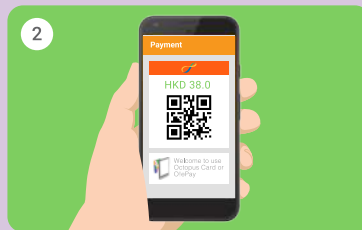Accept Octopus Card

Octopus

Success!

Complete card tapping before accepting Octopus card payment.

(B) Receive Payment

Cashier can input the payment amount, to generate the payment page with electronic QR Code to receive payment.

1

Payment

Enter amount to generate QR code

HKD 38.0

Submit
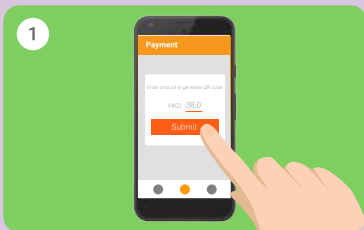
Select "Payment" in the main menu in Cashier Mode, and input the payment amount.

2

Payment

HKD 38.0

Welcome to use Octopus Card or O!ePay

Generate the payment page with electronic QR Code for placing Octopus card* at the back of the mobile device, or scanning electronic QR Code with Octopus App, for payment.
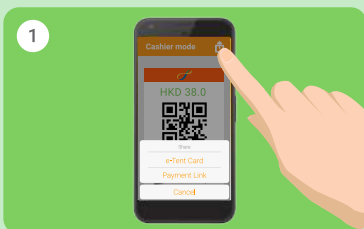
3

Payment

Completed

Finish
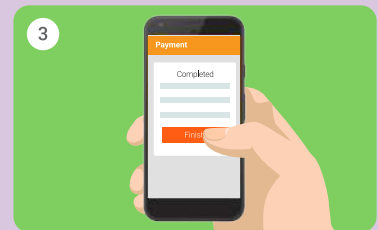
The payment receipt will be shown on screen once the payment transaction is completed, for customer's review.

(C) e-Tent Card or Payment Link

Online Shop

Cashier can export the e-Tent Card or Payment Link through the mobile apps, and display it on the online shop for customers to scan or click for payment.

1

Cashier mode

HKD 38.0

Share
e-Tent Card
Payment Link
Cancel

Select " ⬆ " to share the e-Tent Card or Payment Link.

2

Cashier mode

HKD 38.0

Share

Cancel

Select the mobile app used for sharing.

3

Click this link to pay with Octopus App

Display the e-Tent Card or the Payment Link on the online shop for customers to scan or click for payment.