



Windcave

Windcave Pay App User Guide

Version 1.0

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Welcome

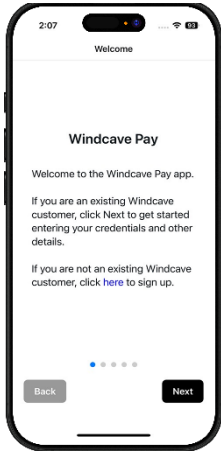
The Windcave Pay app uses the same trusted payment-gateway technology, directly from your phone. When you tap your phone, the app creates a unique, encrypted token that's processed through Windcave's secure payment infrastructure – keeping your actual card details hidden and protected.

The app works in real-time with built-in fraud checks and low-latency processing, ensuring instant and secure payments.

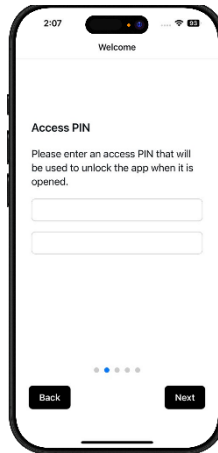
New to Windcave? Visit <https://www.windcave.com/contact-us> to register and start using the app.

First Steps

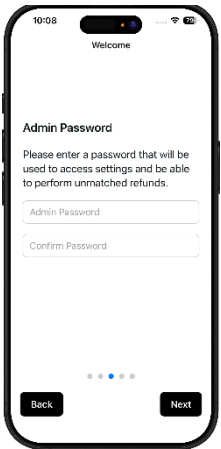
Launch your Windcave Pay App in a few simple steps.



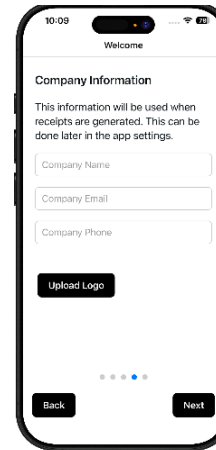
1. Open the Windcave Pay app – A Welcome message will display.
If you are an existing Windcave customer select **Next** and follow the prompts to complete your Windcave Pay setup.



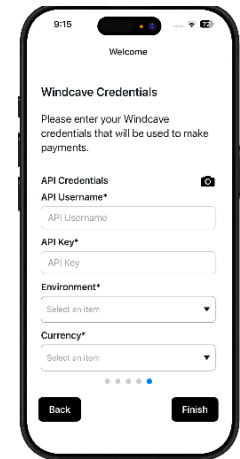
2. Add an Access PIN – This is a PIN needs to be entered whenever the app is opened.



3. Create an Admin Password – This lets you complete Unmatched refunds directly in the app.



4. Company Information – Your company details and logo will automatically be generated onto receipts.



5. Windcave Credentials – Link your account by entering your details manually or by scanning a QR code from another device.

Manually enter your Credentials

Enter your Windcave API Username and Key, select the currency, then select **Finish** to complete.

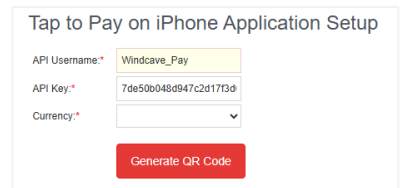
Use a QR Code

Access Payline from your laptop/PC or tablet and navigate to your user **Apple Tap to Pay** tab.

1. Enter your API Username, Key and Currency, then select **Generate QR Code**.

2. Within your Windcave Pay app on mobile, select the  icon to scan the QR code. Your credentials will populate into the fields automatically.

3. Select **Finish** to complete.



Configure your device settings

Set up your device in the Windcave Pay app to begin accepting payments.

1. From the Windcave Pay app home screen, tap the **Settings** icon in the upper-right corner. You will be prompted to enter your Admin password.

2. Configure the device by enabling or disabling the available features:

Tap to Pay on iPhone

Allows Tap to Pay on iPhone through Windcave Pay.

Online Payments

Allows Online Payments through Windcave Pay.

Merchant Reference

Prompts you to enter a merchant reference for each transaction.

This helps identify the payment in reports, refunds or reconciliation through the Windcave Pay app or Windcave Payline portal.

Allow Refund transactions

Allows you to complete refunds directly through the Windcave Pay app.

Allow Complete transactions

Finalises an authorised payment and charges the customer.

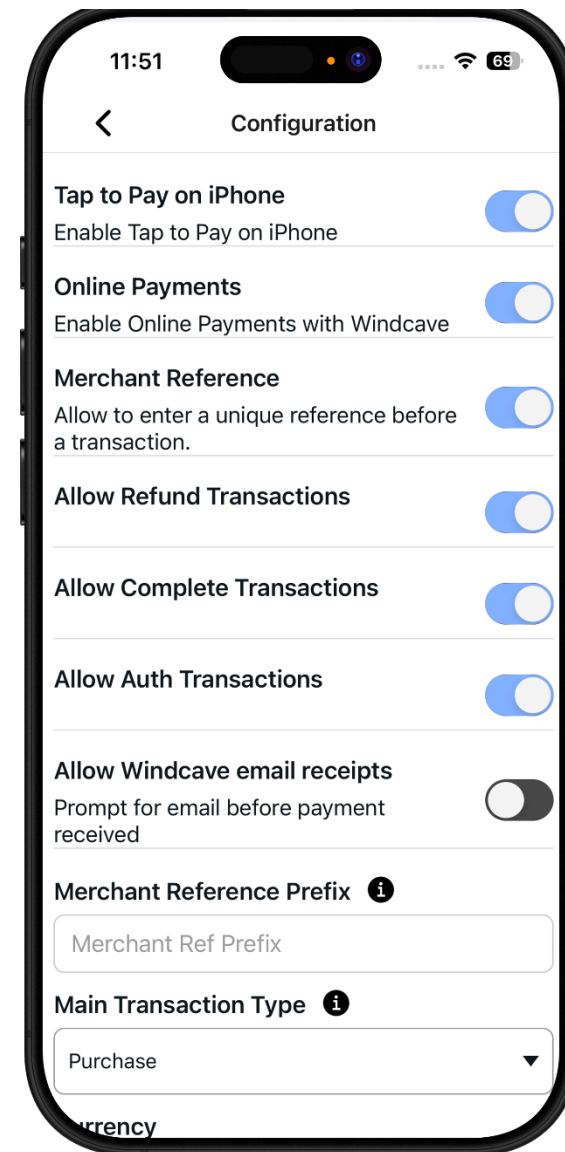
Allow Auth transactions

Checks that the customer has enough available funds and reserves the amount of the transaction, without charging the card.

When ready to finalize, you can process a Complete transaction.

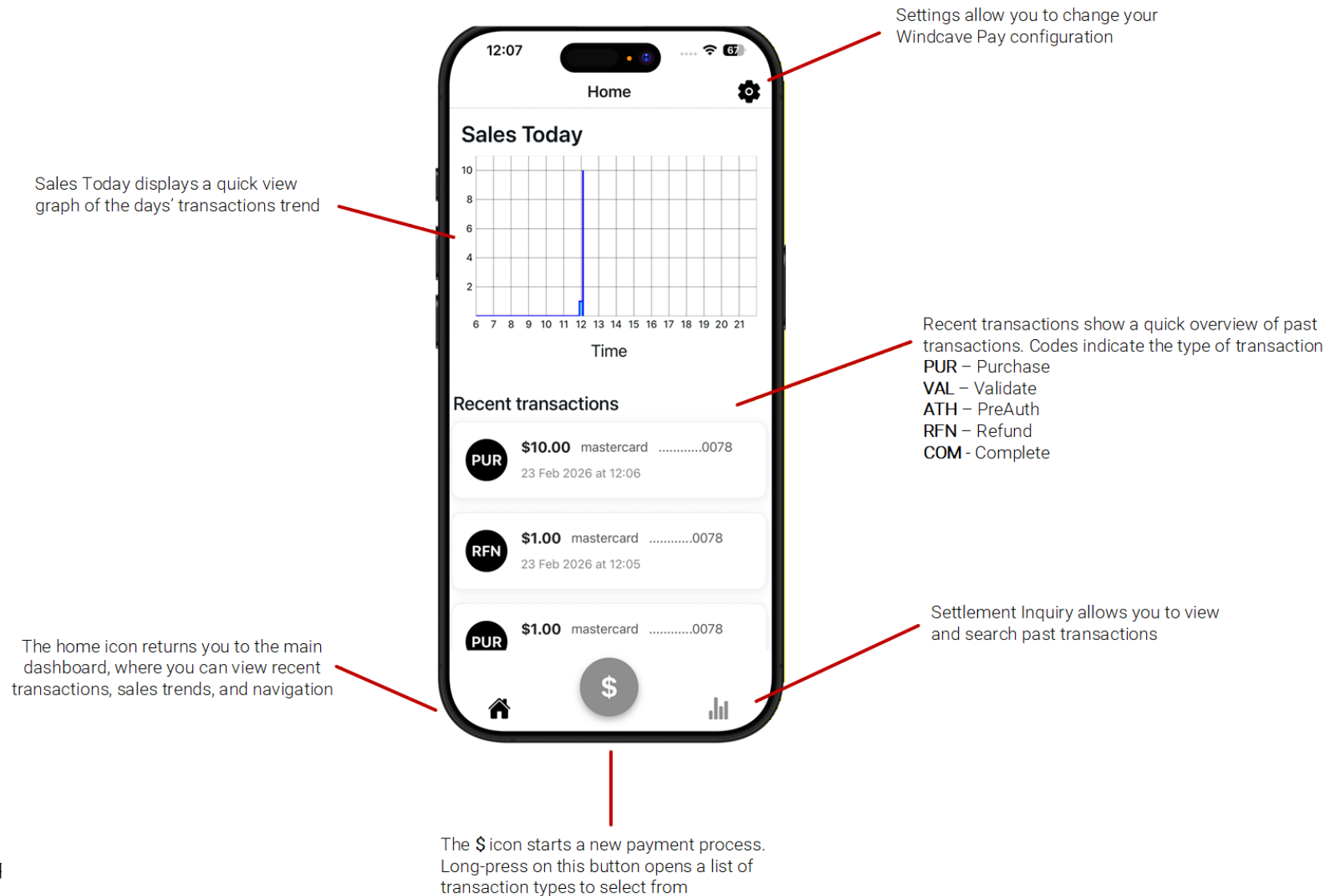
Main Transaction Type

Allows you to set the main transaction type to use when selecting the **S** icon.



Windcave Pay Navigation

A quick guide to the buttons and features on your Windcave Pay app.



Complete a transaction

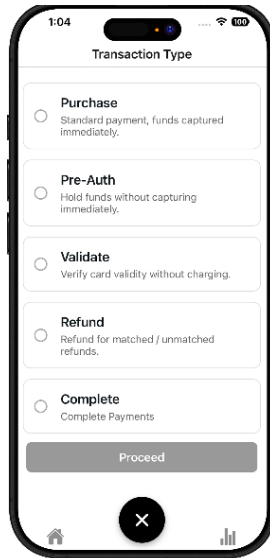
A simple guide to processing transactions on the Windcave Pay app.

Selecting the  icon will take you directly to the purchase transaction screen.

Long-press the  icon to open a menu with a list of available transaction types.

Simply select the transaction type required, then select **Proceed** to continue.

Selecting the  icon will take you back to the dashboard.

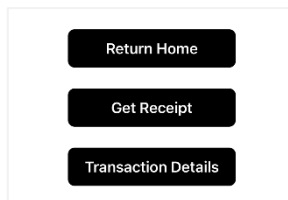


Once the transaction is complete, buttons for Return Home, Get Receipt and Transaction Details will appear.

Get Receipt – Copies the transaction receipt so you can send it via email, text or save it to your device.

Transaction Details – Displays all details of the transaction.

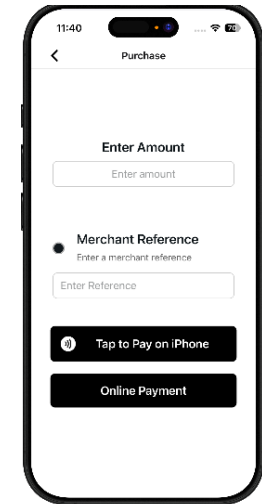
Return Home – Takes you back to the dashboard.



Purchase and Pre-Auth

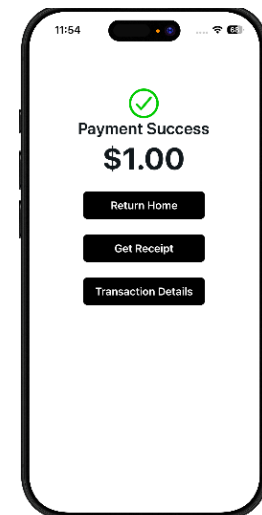
Select the  on the home screen to begin a Purchase transaction.

1. Enter the amount and a Merchant Reference (if configured), then select the **Tap to Pay on iPhone** button.



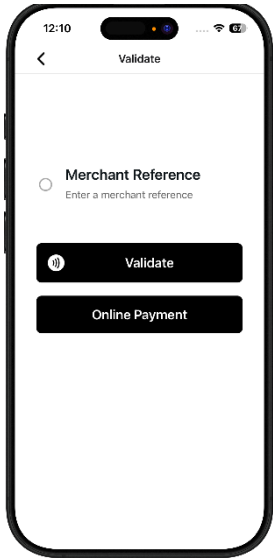
2. Ask your customer to tap their card against the device.

3. A result screen confirms the transaction status and amount.



Validate

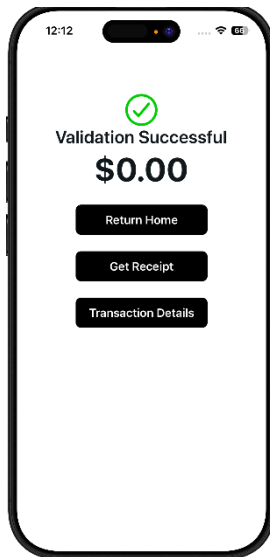
Long-press the  icon and select **Validate**.



1. No amount needs to be entered, simply select the Validate button to initiate the Tap to Pay on iPhone function.

2. The payment page will display **Verify Card**. Ask the customer to tap their payment card against the device.

3. A result screen displays the validation status.



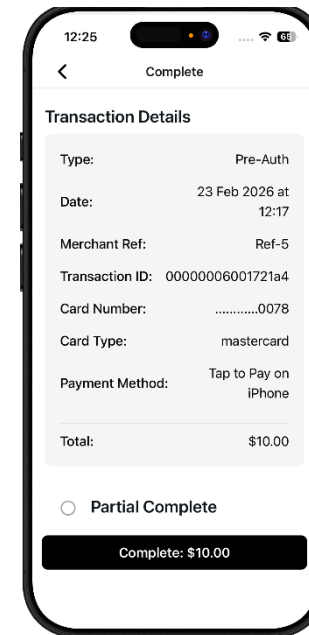
Complete

Long-press the  icon and select **Complete**.

A list of Pre-Auth transactions allows you to select the transaction you want to Complete, or the option to search by Merchant Reference, TransactionId, AuthCode or PAN.

1. Select a transaction and click **Proceed**.

2. Transaction details are displayed on screen. Review the information and select **Complete** to finalize the payment. If a lower amount is required, select **Partial Complete**, enter the amount, and then select **Complete**.



3. A result screen confirms the transactions amount and completion.

Refund

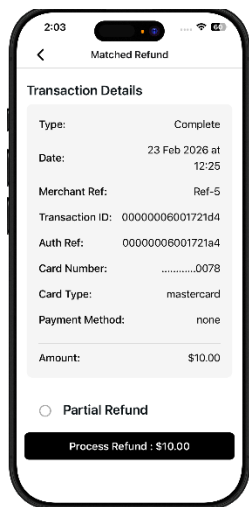
If enabled in the Windcave Pay app settings, you can process refunds on finalized transactions.

Refunds can be **Matched Refunds** (against existing transactions) or **Unmatched Refunds** (manual).

Matched Refund

Matched refunds can be completed by selecting the relevant transaction on the dashboard or by long pressing the  icon and selecting **Refund**.

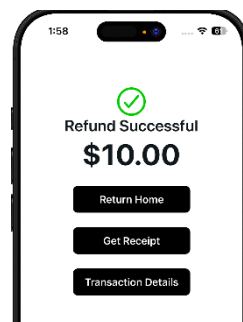
1. Select the applicable transaction, then select **Refund**.



2. Once the details have been reviewed, select the **Process Refund** for the total amount to be refunded back to the original card.

If a lower amount needs to be refunded, select **Partial Refund** and enter the amount. Select **Process Refund** to complete the refund.

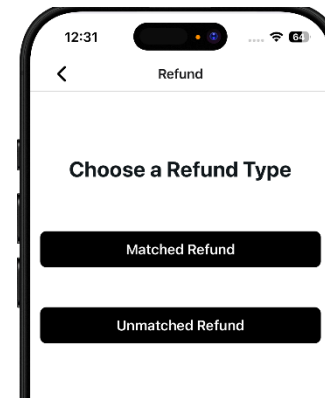
3. A result screen confirms the Refund amount and completion.



Unmatched Refund

Long-press the  icon and select **Refund**.

1. From the options, select **Unmatched Refund**.



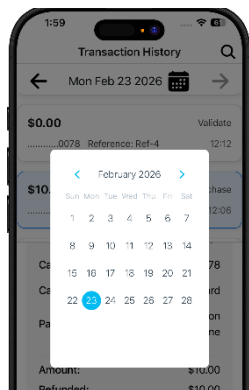
2. You will be prompted to enter your Admin password to proceed.
3. Enter the refund amount and a merchant reference (if configured).
4. Select **Refund** to initiate the **Tap to Pay on iPhone**.
5. Ask your customer to tap their card to complete the refund.
6. A result screen confirms the refund amount and completion of the Unmatched refund.

Settlement Inquiry

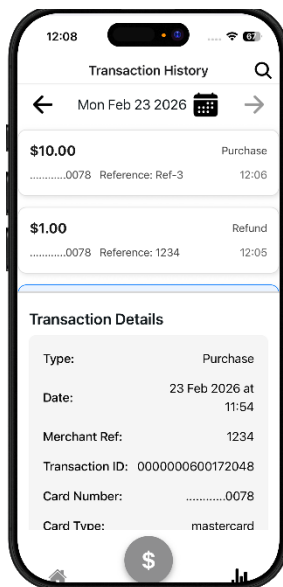
Select the graph icon on the lower right of the screen.

This displays the Transaction history in a scrollable view, along with the details of the last transaction processed.

Select the date to open a calendar and search for transactions on a specific date or select the search icon in the top right to search by TransactionId or Merchant Reference.



Selecting a transaction shows more transaction details at the bottom of the screen.



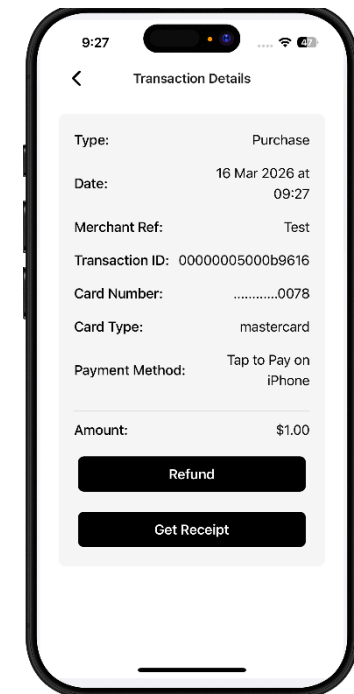
Past Transactions

A summary of your past transactions and sales trends is displayed.

Select a transaction from the list, or use the search function to enter a TransactionId or Merchant Ref.

Details of the transaction will include:

- Purchase type
- Date
- Merchant Ref
- Transaction ID
- Card Number (last 4 digits)
- Card type
- Payment method
- Amount



FAQs

Where can I view my transactions?

Select the **Settlement Inquiry** option and choose the date you want to view past transactions for. From the scrollable list, select a transaction to view further details.

Note: Transactions are stored on the device where they're created. If you use the same login on another device, that device will only show transactions made on it.

No Transaction was found when attempting a Complete transaction

Check and ensure the transaction ID or AuthCode are correct.

Confirm the transaction was completed on the device you are searching on.

I've forgotten my Admin password, how do I regain access?

For security reasons, admin passwords cannot be reset.

To continue using the app, please re-install it and create a new admin password. **Important:** Re-installing the app removes transaction data from the device; however, all transactions will still be available in the web portal (Payline).

Support

For queries or assistance with the Windcave Pay app, please contact our support team - <https://www.windcave.com/contact-us>