



PayRange[®]

Manage: System Overview & Basics

Standard Operating Procedure (SOP)

System: Manage (PayRange Admin Platform)

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1. Purpose

To provide a foundational understanding of the PayRange Manage console (manage.payrange.com). It defines the platform's core purpose, establishes the required workflow for new accounts, and outlines the primary navigation structure. It serves as the governing implementation framework for all Manage Training Manuals (TM-001 through TM-007).

2. Scope

This policy applies to all personnel who access the backend management software for administrative, financial, or technical purposes.

3. System Definition

PayRange Manage is the backend business management platform included with every PayRange BluKey device. It serves as the central command center for:

- **Analytics:** Monitoring mobile sales and generating real-time performance reports.
- **Marketing:** Creating customer offers, tailored discounts, and loyalty programs.
- **Consumer Insights:** Tracking purchasing behaviors to identify trends.
- **Device Health:** Managing hardware status and monitoring connectivity remotely.

4. Getting Started Workflow

To ensure data integrity and payment accuracy, follow this implementation sequence. Some modules apply conditionally based on account structure and operational needs.

1. Create Operator Account & Set Up Banking

Refer to **TM-001 - Manage Account & Banking Setup**

Required for all Operators.

- Establishes the Operator account
- Configures banking for weekly ACH payouts

2. Configure User Roles (If Applicable)

Refer to **TM-002 - Manage Adding & Removing User Roles**



Required when device registration, configuration, or installation is performed by anyone other than the account Owner.

- Assigns staff access levels
 - Grants permissions required for deployment
 - Configures Attendant Mode
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3. Register Devices

Refer to **TM-003 - Manage Device Registration & Configuration**

Required for all Operators using PayRange devices.

- Links BluKey serial numbers to the console
 - Assigns machine configuration settings
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4. Configure Pricing Profiles

Refer to **TM-004 - Manage Creating & Editing Pricing Profiles**

Required prior to go-live.

- Defines vend pricing
 - Configures pulse and serial settings
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5. Create Rooms & Enable Live Availability (If Using Remote Pay)

Refer to **TM-005 - Manage Creating Rooms & Assigning Devices for Live Availability**

Required when using Remote Pay or live monitoring features.

- Groups machines by location
 - Enables Remote Pay & monitoring
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6. Install Hardware

Refer to official installation manuals.

(Not part of Manage Training Manual numbering.)

- Physical BluKey installation

7. Configure Marketing Campaigns (Optional)

Refer to **TM-006 - Manage Marketing Campaigns**

Optional based on business strategy.

- Activate New User incentives
- Configure STARS loyalty program

8. Review Sales & Financial Reporting

Refer to **TM-007 - Manage Sales, Reporting & Financials**

Required for Operators responsible for reconciliation and performance monitoring.

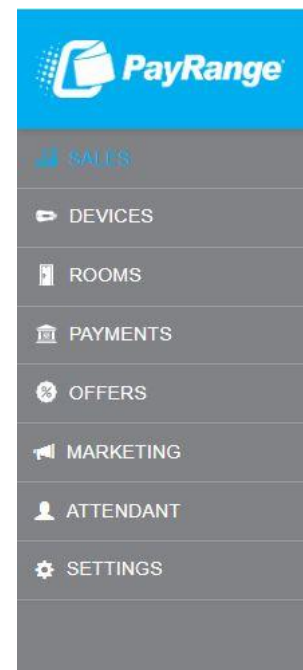
- Monitor sales performance
- Reconcile payouts
- Understand transaction-to-deposit flow

5. Navigation Console (Sidebar Definitions)

The interface is organized into eight primary sections. Users must understand these definitions to navigate effectively:

SALES: The data hub. Contains the Dashboard (visual charts), Summary/Weekly Reports, and the Transaction Audit list.

- **DEVICES:** Hardware management. Used for Registering new units, viewing the Map of device locations, and managing Pricing Profiles.
- **ROOMS:** Physical organization. Used to group machines by location, monitor Health status, and execute **Remote Pay**.
 - **Note:** not every Operator has individual “Rooms” created.
- **PAYMENTS:** Financial settings. Viewing Bank Account details and initiating Instant Transfers.





- **OFFERS:** Manual marketing. Used to generate Coupon Codes and Free Purchase Codes.
- **MARKETING:** Automated loyalty. Home to the STARS Reward Program and New User Campaigns.
- **ATTENDANT:** Operational tools. Allows staff to "free start" machines for testing or cleaning.
- **SETTINGS:** Administrative controls. Managing User Roles, Custom Fields, and the Change Log.

6. Key Performance Tools

Operators should utilize these three core features to maximize efficiency:

- **Dashboard:** Provides immediate breakdown of Mobile vs. Cash/Card sales percentages.
- **Remote Pay:** Allows an operator to start a machine from anywhere in the world to resolve a customer service issue instantly.
- **Weekly Sales Reports:** Delivers automated revenue summaries sent via email to eliminate manual counting.

7. Support & Escalation

For issues not resolved by the Training Manuals, utilize the following resources:

- **PayRange University:** Online hub for video tutorials and webinars (<https://payrange.com/support/payrange-university/>)
- **Help Center:** support.payrange.com (Installation Manuals & Troubleshooting).
- **Operator Support:** email: ask@payrange.com | 855-856-6398 (opt 2).