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User Guide

SmartEXCLUSION Tablet Application

Smart ALERT Limited

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Review the SmartEXCLUSION Privacy Statement at the Smart Alert website.

Contents

1. Initial login

In order to use the SmartEXCLUSION application on your device you are required to enter initial login details. Enclosed within the package we supplied you will have received a document containing your unique login details in the form a *Shop ID* and a *password.*

📝 **Note:**

If you do not have your login details please consult the **Getting Support** section of this user guide.
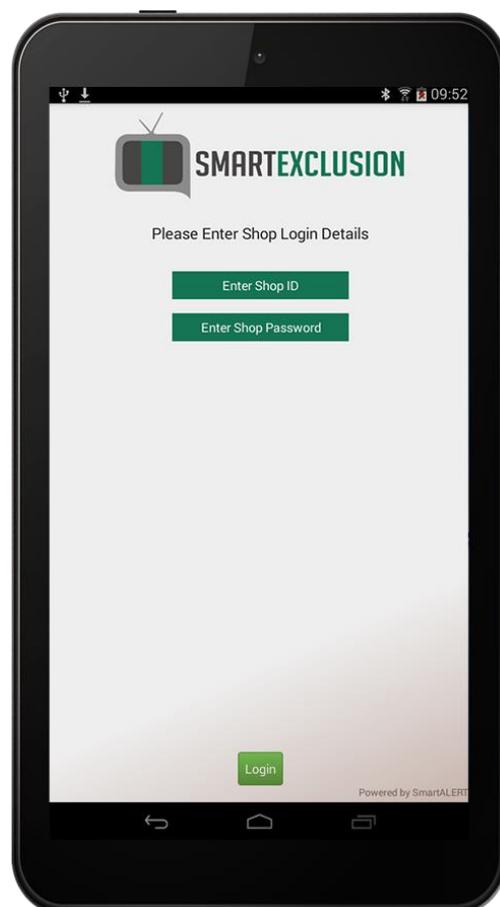

Figure 1.1

After powering on your device in the normal way, the SmartEXCLUSION application will automatically load and you will be presented with a screen similar to the one shown in *figure 1.1*

▶ **To login to the SmartEXCLUSION application**

1. Click on the field labeled *Enter Shop ID*, this will display the on screen keyboard.

2. Type in your *Shop ID* code using the on-screen keyboard. **Please Note: this field IS case sensitive.**

3. Click on the field labeled *Password*, again the on screen keyboard will be displayed. Enter the password that you have been provided. **Please Note: this field IS also case sensitive.**

4. Click **DONE**.

5. Click **LOGIN**.

Once your login details have been authenticated, you will be taken directly to the main menu.

Important:

If you enter incorrect details you will be presented with a message saying "Log In Failed"

Re-check your login details that you have been provided with and re-enter them. If you still experience difficulties in logging in to the SmartEXCLUSION application, consult the *Getting Support* section of this user guide.

2. Main Menu

Once you have successfully logged in to the SmartEXCLUSION application on your device you will be taken to the applications Main Menu as shown below in *Figure 2.1*
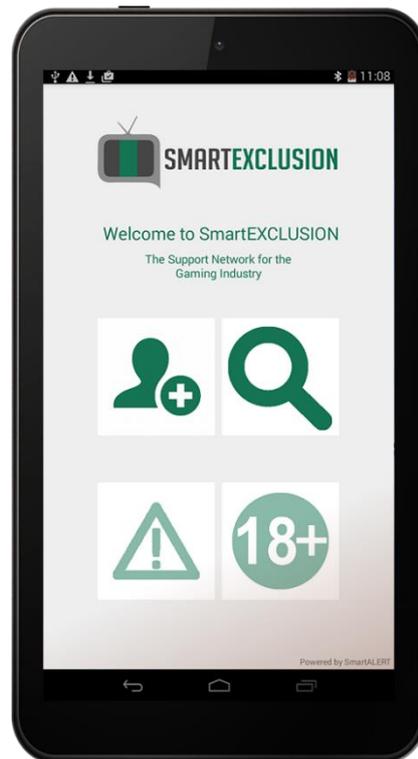
Figure 2.1

The main functions available are outlined below:-

	Create new Self Exclusion Use this button when adding any new self-exclusion to the system.	
	View Carousel View the latest and all registered self-exclusions currently on the network.	
	This feature is currently disabled in this version of the SmartEXLUSION application.	
	This feature is currently disabled in this version of the SmartEXLUSION application.	

3. Adding New Self-Exclusion

Click the Create New Self Exclusion icon from the main menu, you will then be taken to the Self-Exclusion Pre-Checks screen as shown in Figure 3.1 below.
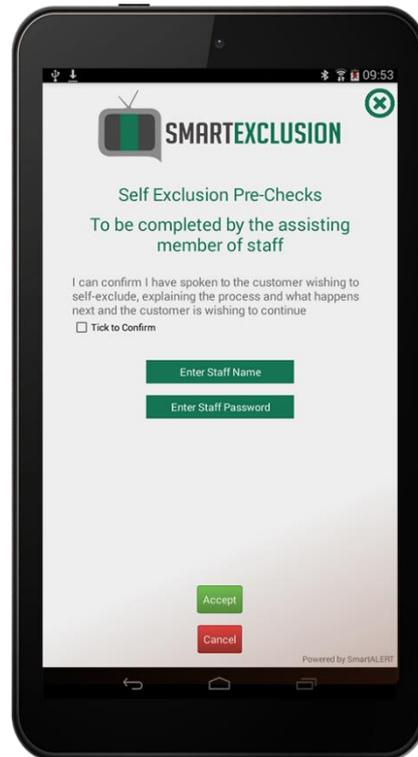
Figure 3.1

 Important:

> You are required to acknowledge that you have spoken with the customer and confirm that they fully understand the terms and conditions of the self-exclusion process.

Operator Login

 To create a new SmartEXCLUSION application

1. Tick the box to confirm the customer is fully aware of the process.
2. Type in your *Staff Name* using the on-screen keyboard.
3. Click NEXT.
4. Enter your *Password* using the on-screen keyboard. **Please Note: this field IS also case sensitive.**
5. Click **DONE**.

6. Click **ACCEPT**.

Once your login details have been authenticated, you will be taken directly to the customer details screen.

 Important:

If you enter incorrect details you will be presented with a message saying "Log In Failed"

Re-check your login details that you have been provided with and re-enter them. If you still experience difficulties in logging in to the SmartEXCLUSION application, consult the *Getting Support* section of this user guide.

Figure 4.2

Customer Details

▶ **To enter the customers details**

1. Select the first field entitled *First Name* and complete the name of the customer as sown in Figure 3.2 above.

2. Complete the rest of the form in the same way as detailed in point 1 above.

3. Click **DONE**.

4. You will then be presented with the *Personal Details* page.
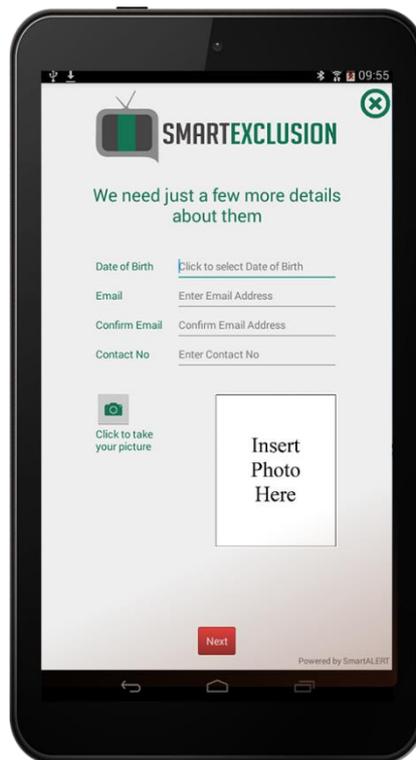
Figure 3.3

Personal Details

▶ **To enter the customers personal details**

1. Select the field entitled *Date of Birth* and complete by using the scroll wheel to select the correct date, month and year. Once you are happy with the date, click **SET**.
2. Complete the rest of the form in the normal manner.
3. Click **DONE**.
4. In order to complete the application, you will be required to take a photo of the customer which will be attached to the application.
   a. Click the camera icon to launch the camera application.
   b. Take a photo of the customer ensuring the image quality is clear and in focus. If you are happy with the photo click **SAVE**, if not, click **DISCARD** and retake the photo.
5. Once you are happy that everything has been completed, click **NEXT**.

Figure 3.4
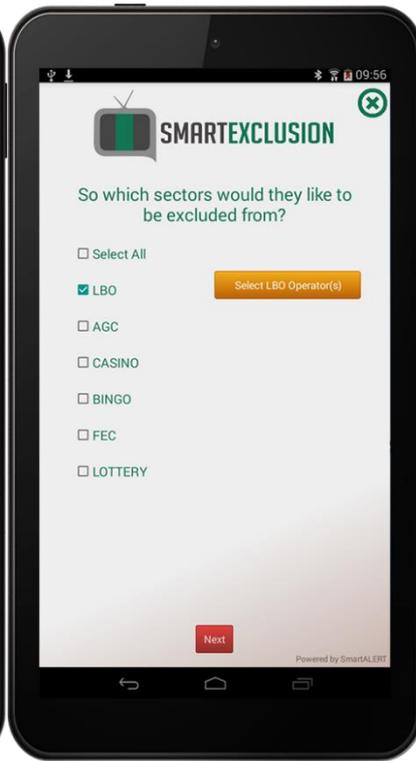
Figure 3.5
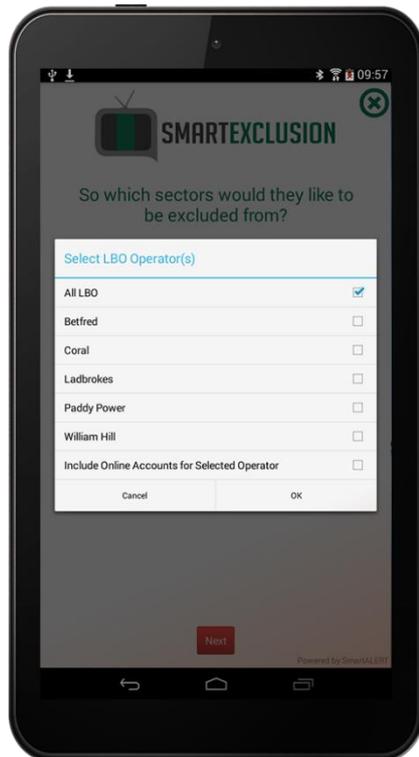
Figure 3.6
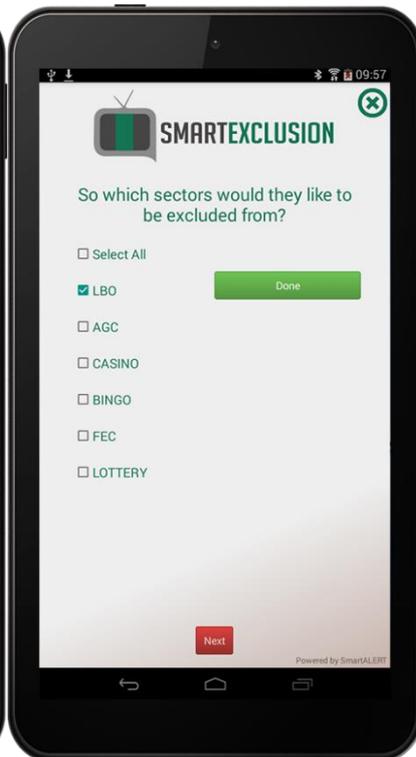
Figure 3.7

Which Sectors

▷ **In this section you are required to select which sectors the customer wants to exclude themselves from. It also allows you to select any or all of the operators within each sector.**

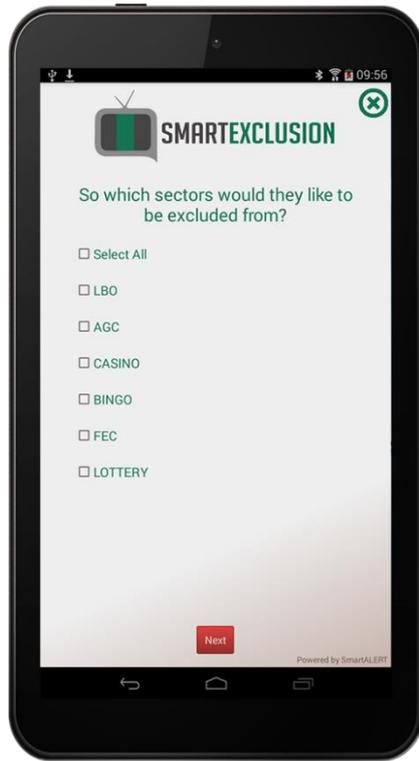1. If the customer wishes to exclude themselves from all sectors, simply click **SELECT ALL** in order to exclude from all sectors. See Figure 3.4 above.

2. If the customer wants to select only certain sectors to be excluded from, then select the appropriate sector as shown in *Figure 3.5* above, once selected then you are presented with a list of operators within that sector.

3. Select ALL to exclude from all operators, or select the operators you wish to be excluded from, see *Figure 3.6* above.

4. If the customer also wishes to exclude from on-line accounts, select "online accounts" from the drop-down menu. This will inform the operator that the customer has an existing on-line account and also wishes to be excluded from its use.

5. Once you are happy with the selections, Click **NEXT**.

Which Locations

Figure 3.8

▷ **In this section you can specify the location that the customer wishes their exclusion to be limited to, or you can select all to cover nationwide.**

1. By default NO is selected, selecting YES will result in a nationwide exclusion, please ensure that the customer is fully aware of the implications of this option.
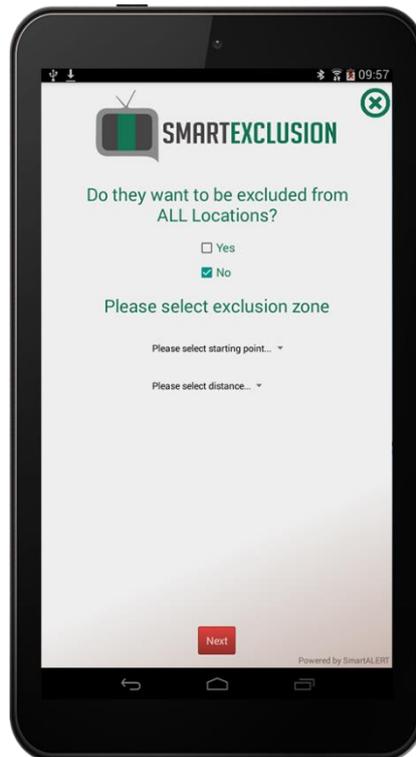
2. Click the field labeled *'Please select starting point'* you will be presented with a list of options, these are covered below:

    a. Home Postcode – this is the postcode that was entered in the Customer Details section of the application process (see page 8 for further details).

    b. Shop Postcode – this is the postcode of the store that the application is being completed in, i.e. the current location.

    c. Town or City – this is the town or city that was entered in the Customer Details section of the application process (see page 8 for further details).

    d. County - this is the county that was entered in the Customer Details section of the application process (see page 8 for further details).

3. Once the selection is complete, you can then select a radius from the dropdown menu. The radius will be in miles from the indicated starting point.

4. Once you are happy with the selections, Click **NEXT**.

Length of Exclusion

▷ **This section allows the customer to determine the length of their self-exclusion and choose whether they would like a reminder that their exclusion period is nearly over**
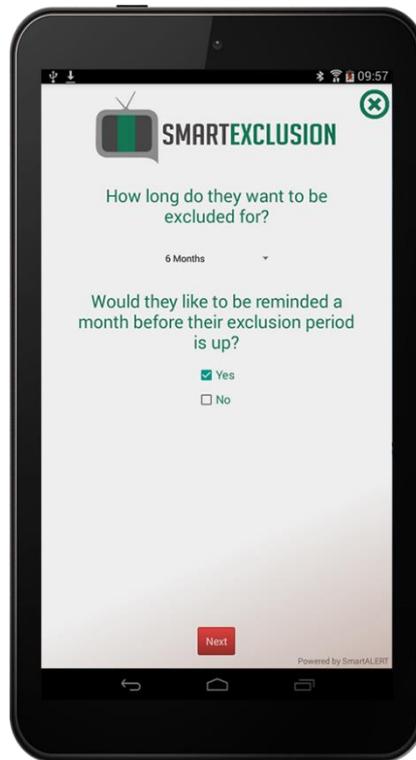
Figure 3.9

1. Click on '***Please select from list'*** to view the available options, which currently range from between six to twelve months, and select the customer's choice.
2. If the customer would like a reminder when their exclusion period is coming to an end click ***Yes*** if not click ***No.***
3. Click NEXT.

Identification

▶ **This section is not currently active in this version of the application and therefore will default to NO.**

Figure 3.10

To continue with the self-exclusion process click *next.*

Additional Support

▶ **This section of the self-exclusion process provides the customer with the option of receiving external support information from our support partners, GamCare and Gamblers Anonymous.**
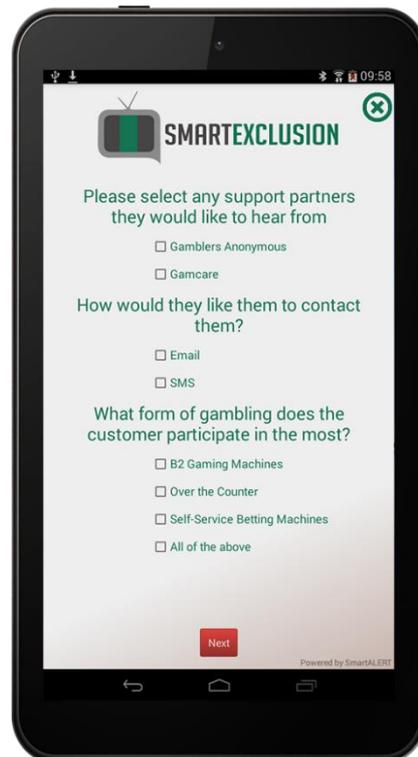
Figure 3.11

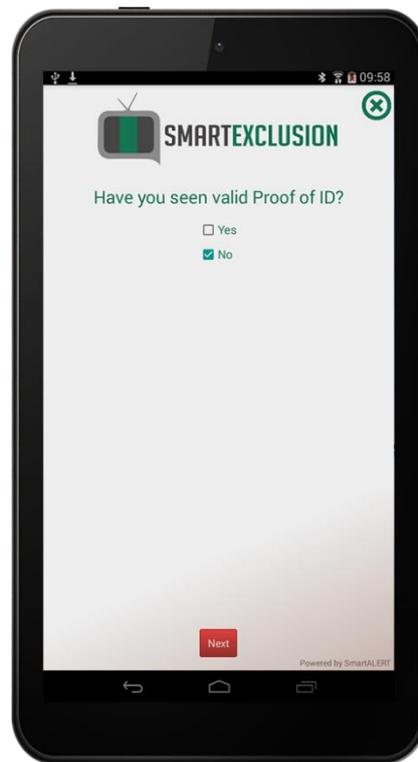1. If the customer *would* like to receive support information *click the box* next to either, or both, of the support agencies.
2. The customer is then required to suggest what their preferred method of contact would be, *click the* box next to either, or both, *SMS* and *Email*.

3. Finally ask the customer which form of gambling they most often participate in, the choices are:-

    a. B2 gaming

    b. Over the counter

    c. Self-service betting terminals

    d. All of the above

4. Once you are happy with the selections, Click **NEXT**.

Important:

If the customer ***does not wish to receive support*** please leave these boxes unchecked and click ***next*** to move onto the next section.

Terms and Conditions

It is important that the customer fully understands the terms and conditions of the self-exclusion process.

To ensure that they do, you must carefully read them each of the four statements, shown in figure 3.12 clicking the *tick to confirm* box after each statement, once they have confirmed that they understand.
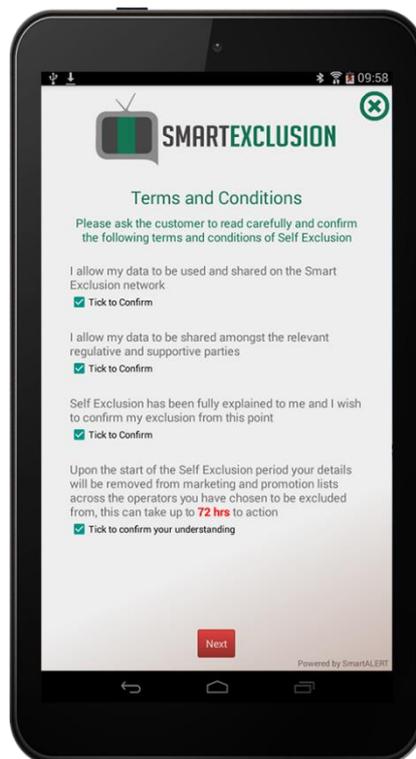

Figure 3.12

After reading all of the statements, and *confirming the customer understands each one*, you can click *next* to continue.

Important:

The customer will *not* be allowed to continue with the self-exclusion process if they do not agree to *all* of the terms and conditions.

Customer Signature

In order to complete the self-exclusion process you must obtain a copy of the customer's signature.

To do this **pass the tablet to the customer** and allow them to use either their **finger or a stylus** to sign their name in the available box, shown in **figure 3.13**

Figure 3.13

Figure 3.14
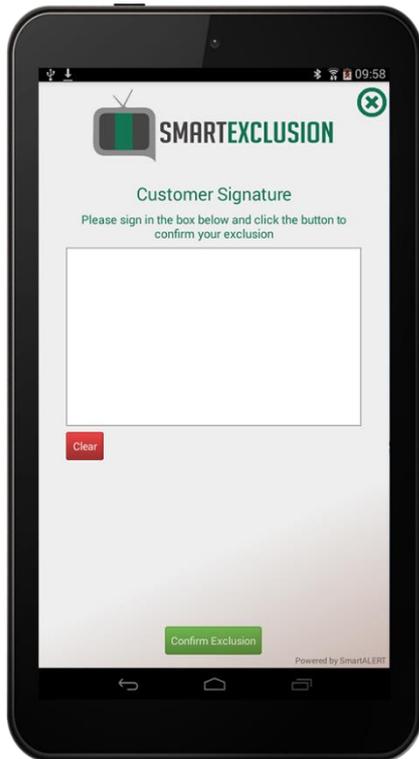
Press *clear* to reset the box and try again if you or the customer are not happy with the result.

Figure 3.14 shows how the screen will look once the customer has signed their name.

Once you are both satisfied with the signature click *confirm exclusion*. This will cause the customers self-exclusion to be uploaded to the SmartEXCLUSION network.

The self-exclusion process is now complete.

4. Carousel & Breach Reporting

The carousel allows you to view all of the customers who are currently self-excluded, with the most recent appearing at the top left of the screen as shown in *figure 4.1*

You can also report a *breech* from within the carousel, if you witness a customer attempting *to breach their self-exclusion agreement*.

To access the carousel click *View Carousel* on the *Main Menu.*
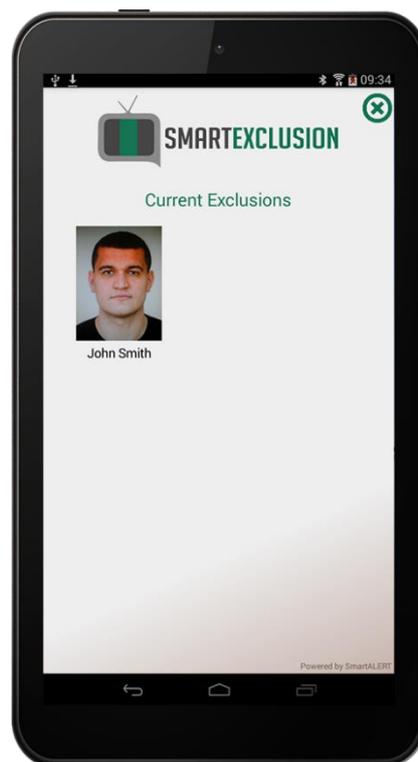

Figure 4.1

Swiping your finger vertically along the screen allows you to scroll up and down the carousel.

▶ **To view more information and report a breech**

1. Simply click on the photo of the exclusion you would like to view.
2. This will make the picture full screen.
3. Additional information such as *full name, type of exclusion* and *length of exclusion* will be displayed.
4. From within this screen you can also report a *breach,* if you believe the customer has breached the terms of their self-exclusion agreement.
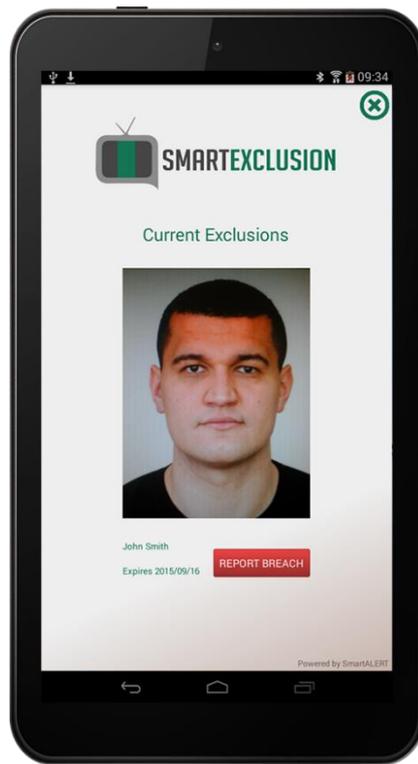5. To report a breach simply click on the *breach button*, shown in *figure 4.2*

Figure 4.2

◆ **Important:**

To determine whether a customer has ***breached their self-exclusion agreement*** please see your employer's self-exclusion ***terms and conditions***.

To exit the carousel and return to the main menu click the ***exit cross*** in the top right corner of the screen or alternatively press the ***back or home button*** on the tablet.

5. Updates

If there is a new update available for the application you will be able to install it from within the application itself.

Simply navigate to the **Carousel**, from the main menu, and if there is an update available you will see the icon in the **top left hand corner of the screen**.

Note:

> If you are having trouble navigating to the Carousel please go to **Section 4** to find instructions.

Click on the **update icon** and the application will **automatically update**, this may take a few minutes.

Important:

> You will need an **internet connection** to be able to update the application, so before proceeding please check you are connected either to **Wi-Fi or 4G**.

Contact Details

If you are still having trouble using **SmartEXCLUSION** please feel free to contact our helpdesk.

Helpdesk	
Telephone Lines open 09:00 – 20:00 (Monday-Friday) Excluding public bank holidays.	**0845 52 40 114**
Email	**lbotrial@smartalert.org.uk**
Website	**www.support.smartalert.org.uk**