User Guide

Mobile Payment Acceptance User Guide

Vital MobileSM
Touchscreen Terminal

Disclosure Statements

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Introduction

Mobile Payment Acceptance (MPA) is an easy-to-use application on your VITAL MOBILE/A920 device that provides reliable, secure, and portable transaction processing, as well as other useful features for managing your business.

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Account Activation and Login

Activate Your Account

To begin processing payments with Mobile Payment Acceptance, you first need to activate your merchant account. During the account activation process, you will create a password for future login as well as a personal identification number (PIN) for quick access.

In order to activate your merchant account, you will need the email address associated with your account which contains your merchant account information as well as your truncated 12-digit Merchant ID and 14-digit Device ID numbers. Your non truncated Merchant ID will be provided to you during our phone onboarding and training session.

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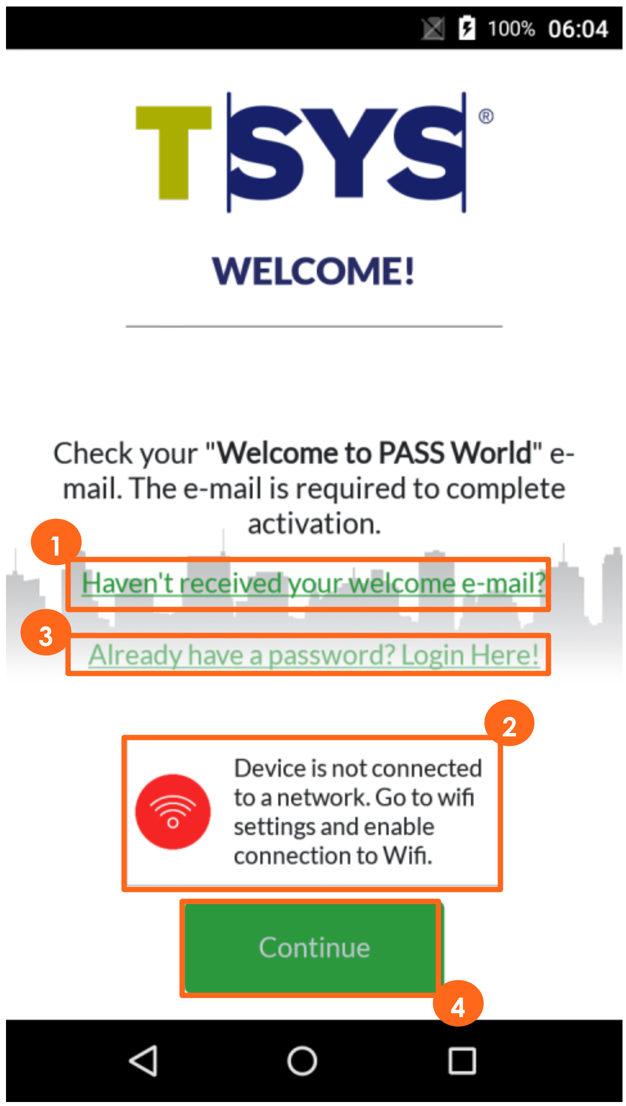
There are several links on the welcome screen:

1. If you have not yet received your welcome email, tap **Haven't received your welcome email?** You can contact Customer Support at 800-654-9256 to request another one.
2. If the device shows a red icon and **Device is not connected to a network,** tap the link to start or set up the Wi-Fi connection.
3. If you have already activated your account, tap **Already have a password? Login here!**
4. Otherwise, tap **Continue** to activate your account and sign in for the first time.



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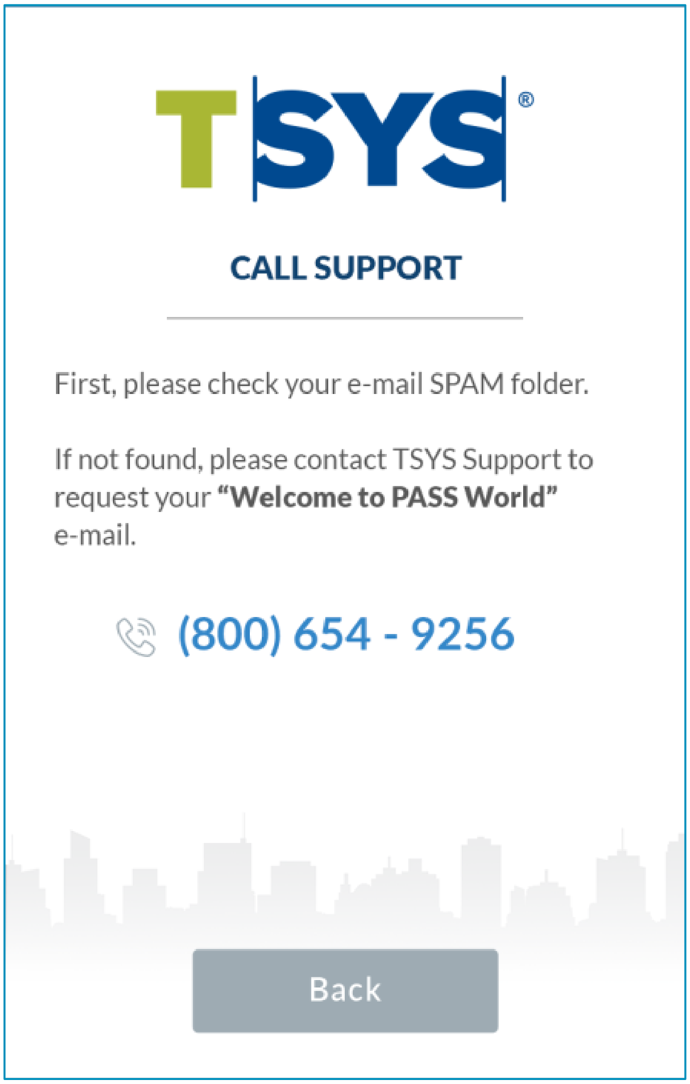
Haven't received your welcome email?

If you did not receive a welcome e-mail, please contact Customer Care at 800-654-9256 to request another one.



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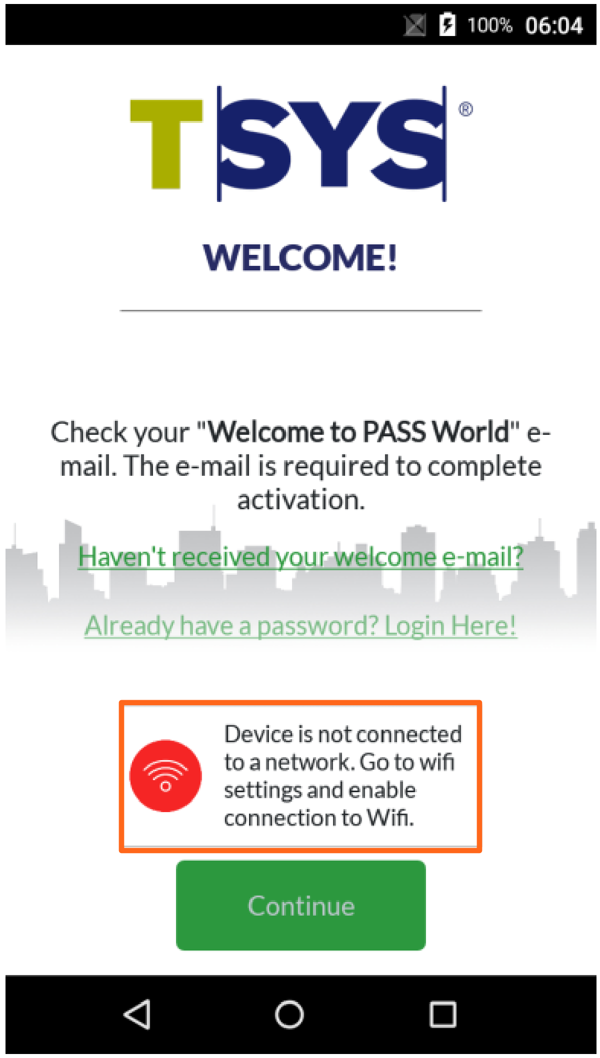
Not connected to the internet?

If the device is not connected to the internet:

1. Tap the **Device is not connected to the internet** icon.



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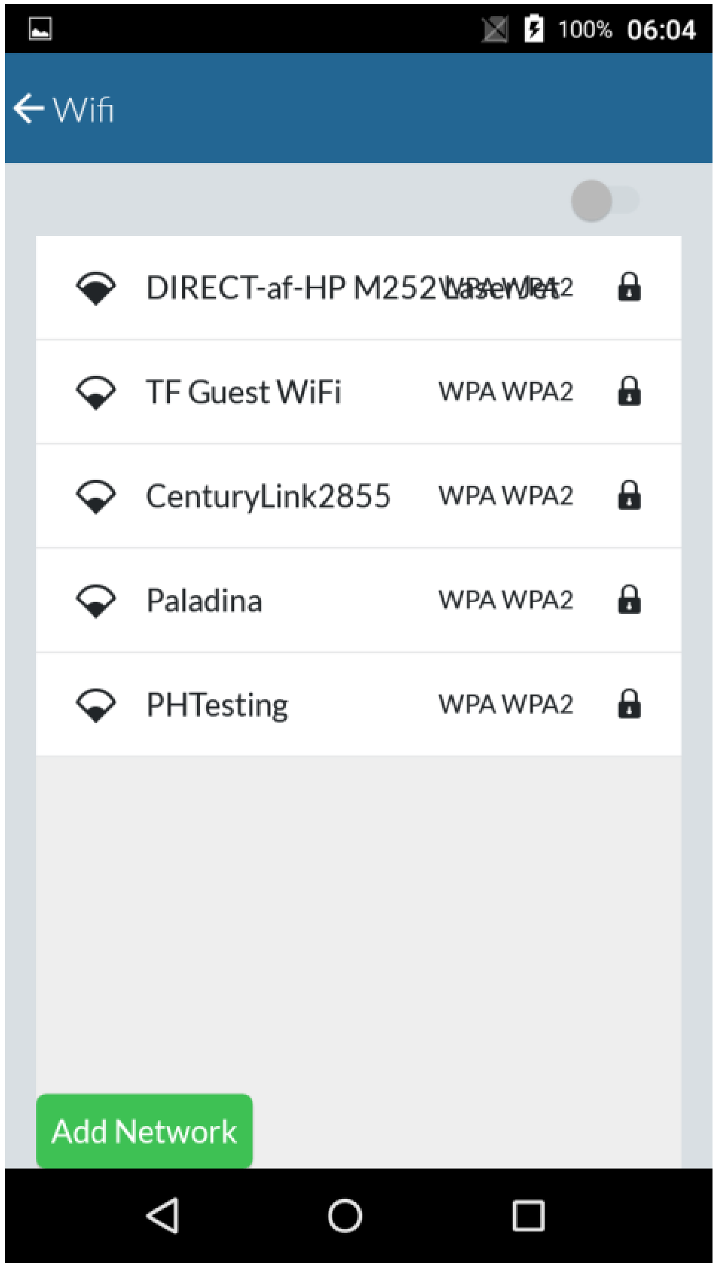
2. Connect to your Wi-Fi network.



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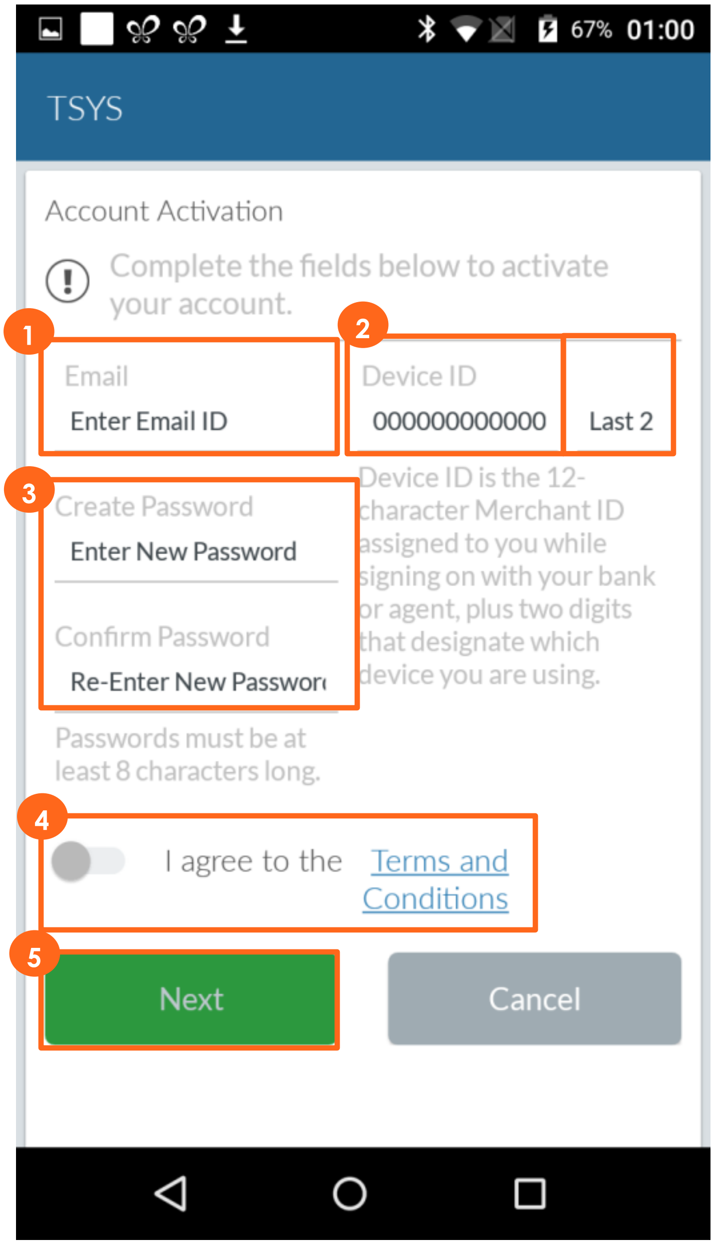
Activate your account and sign in for the first time

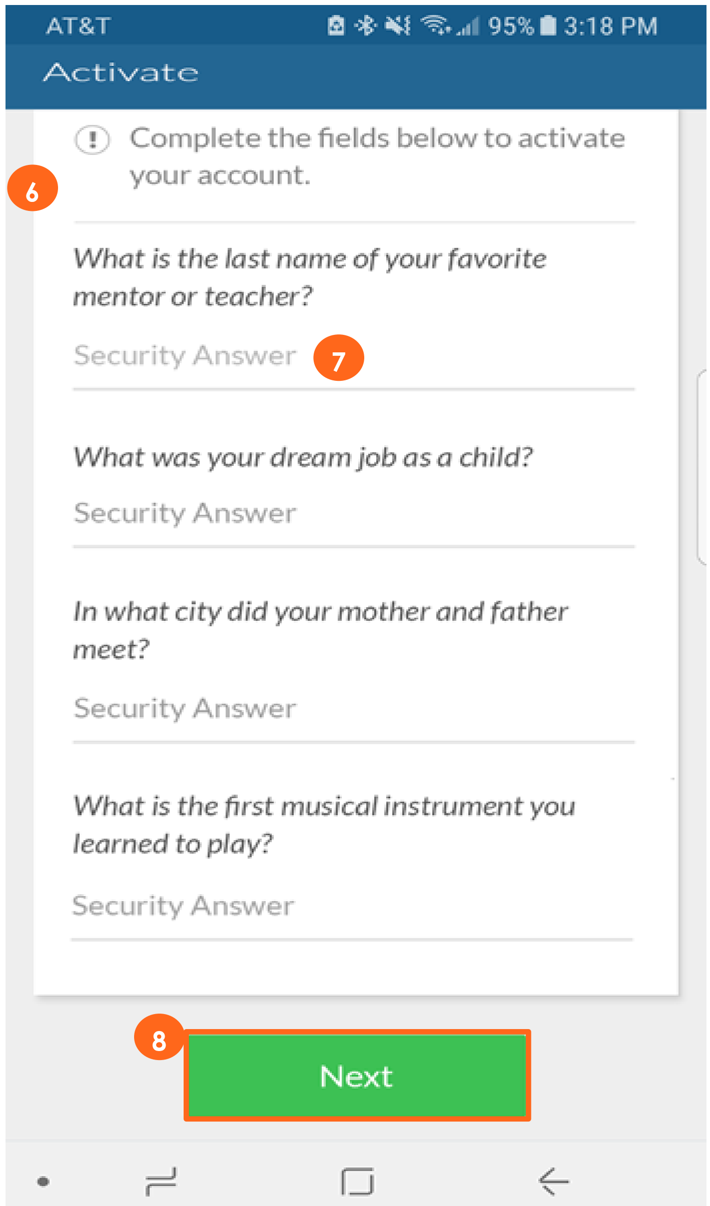
1. Enter the **Email ID**. This is the email used for correspondence related to your merchant account.
2. For the **Device ID** use your Merchant ID and add two digits to the end depending on the device you are using. If you have one device this is 01, if you have 2 devices this is 02 and so on.
3. Enter and re-enter a **New Password.** Be sure to record this password for future use.

> **Note**: The password must contain eight to sixteen characters, and consist of at least one number from 0 to 9, at least one uppercase and one lowercase letter from A to Z, and at least one special character (! @ $ ^ * - _ .). Your password can not contain spaces or match any of the previous six passwords.

4. Move the slider to indicate that you agree with the Terms and Conditions.
5. Tap **Next.**



6. Tap each security question prompt and select a question.
7. Enter answers for each of the four security questions.
8. Tap **Next**.



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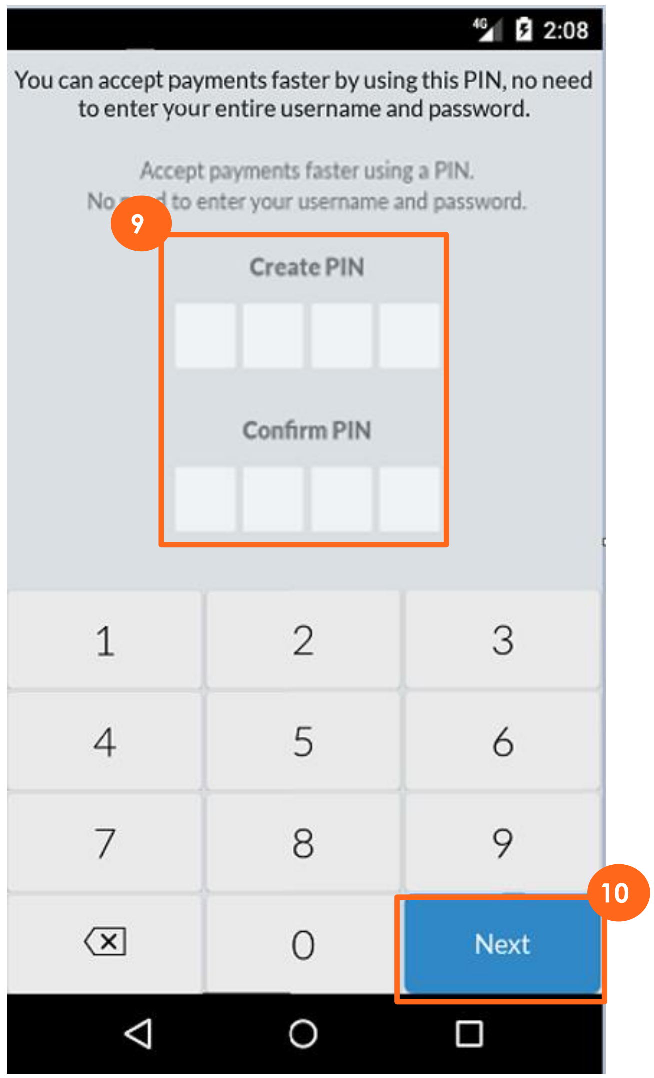
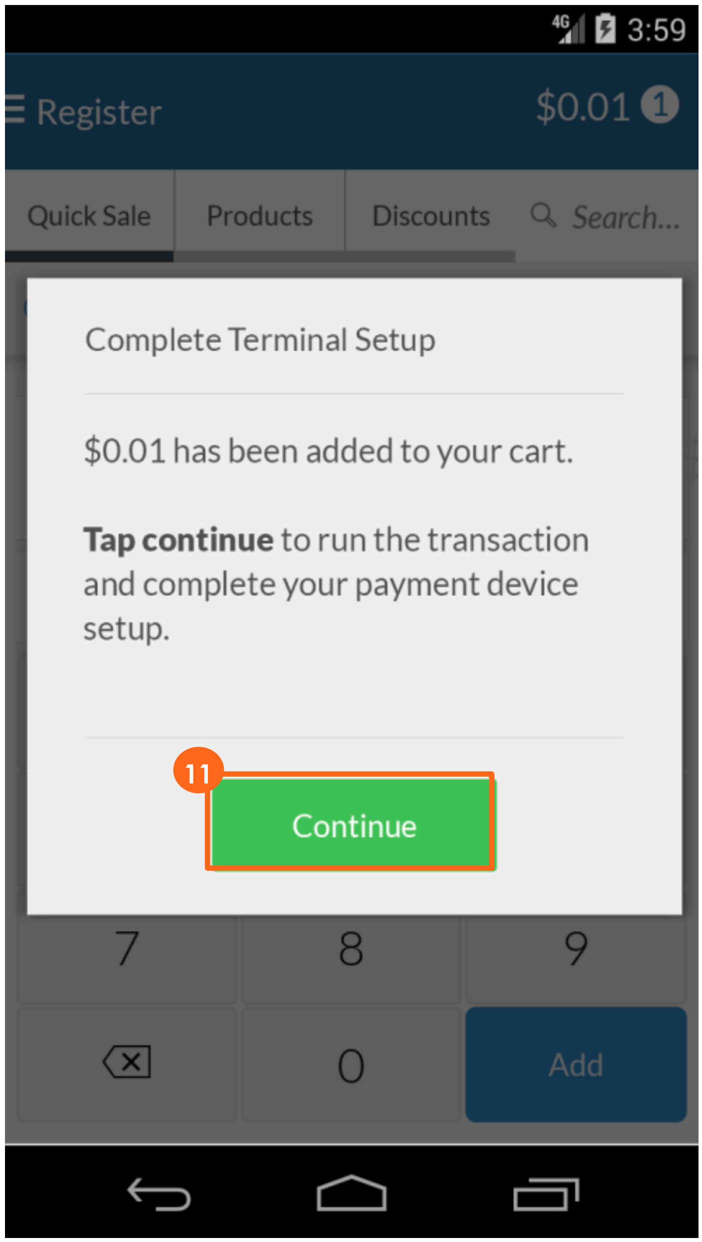
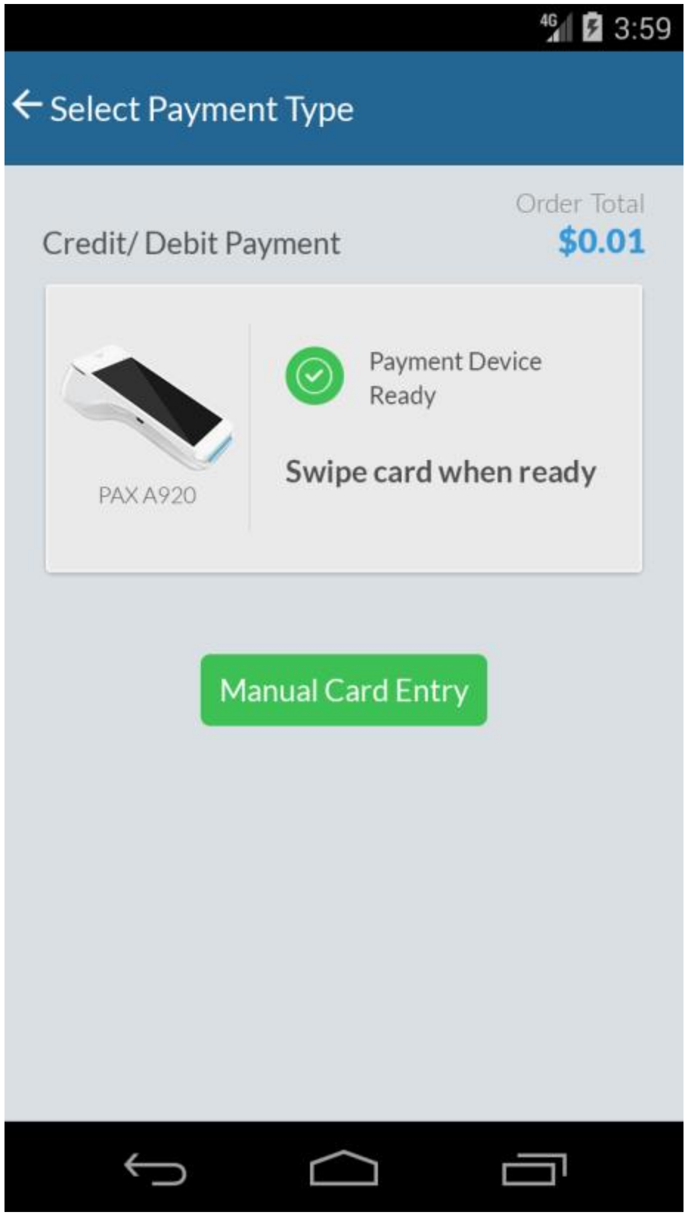
9. Use the number pad to create your new PIN and tap **Next**. Re-enter your PIN to confirm it. Record this PIN for future use, as it can be used to quickly log into the application after it times out, when the device is turned off, or when the application is closed and reopened.
10. Tap **Next**.



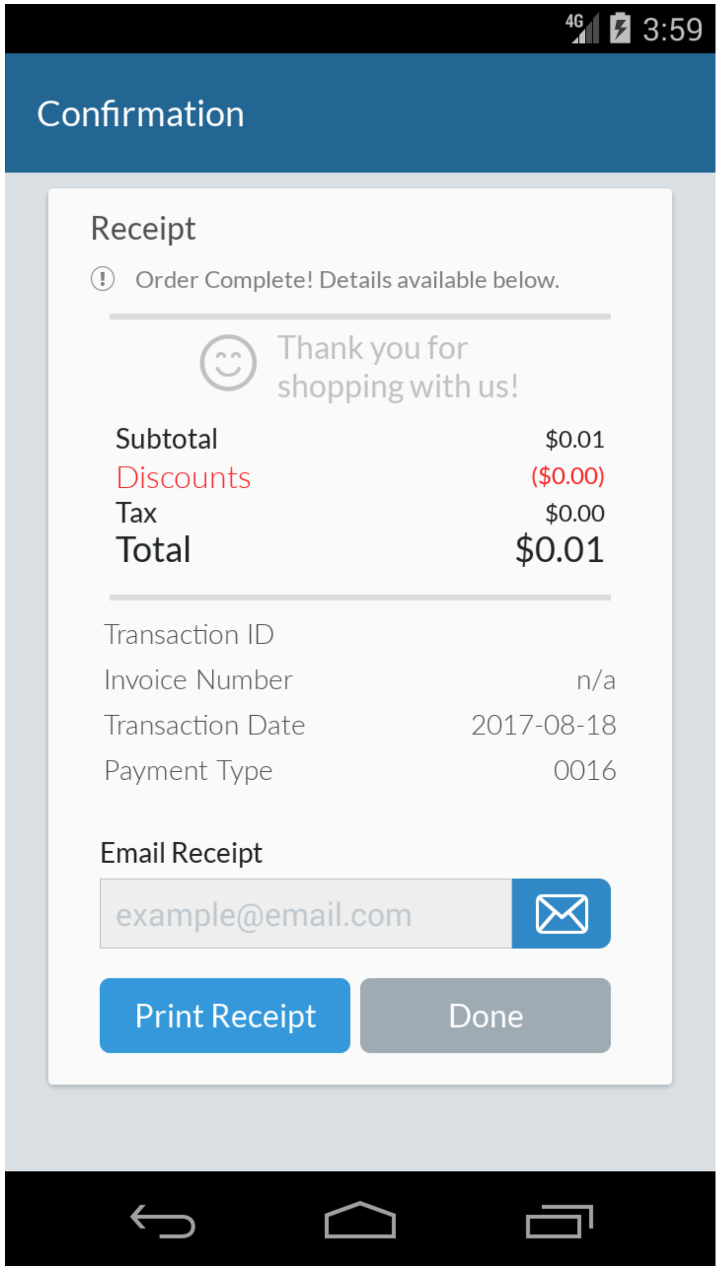
11. A dialog box displays. Tap **Continue** to run a test transaction to complete the device setup.



12. Initiate a test transaction by inserting a card, swiping a card, or selecting manual entry.

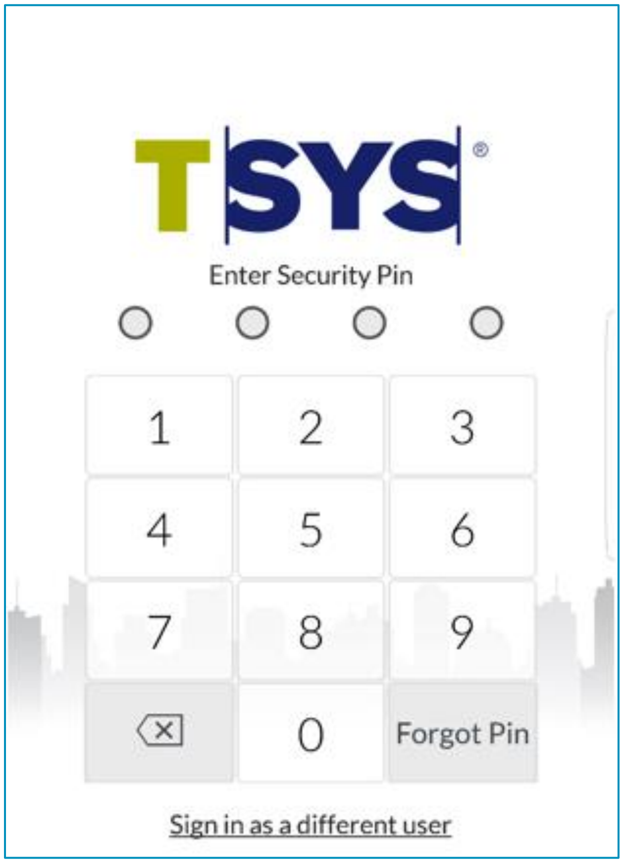


13. A confirmation screen displays showing that the test transaction has been approved. The setup process is now complete.



PIN Entry

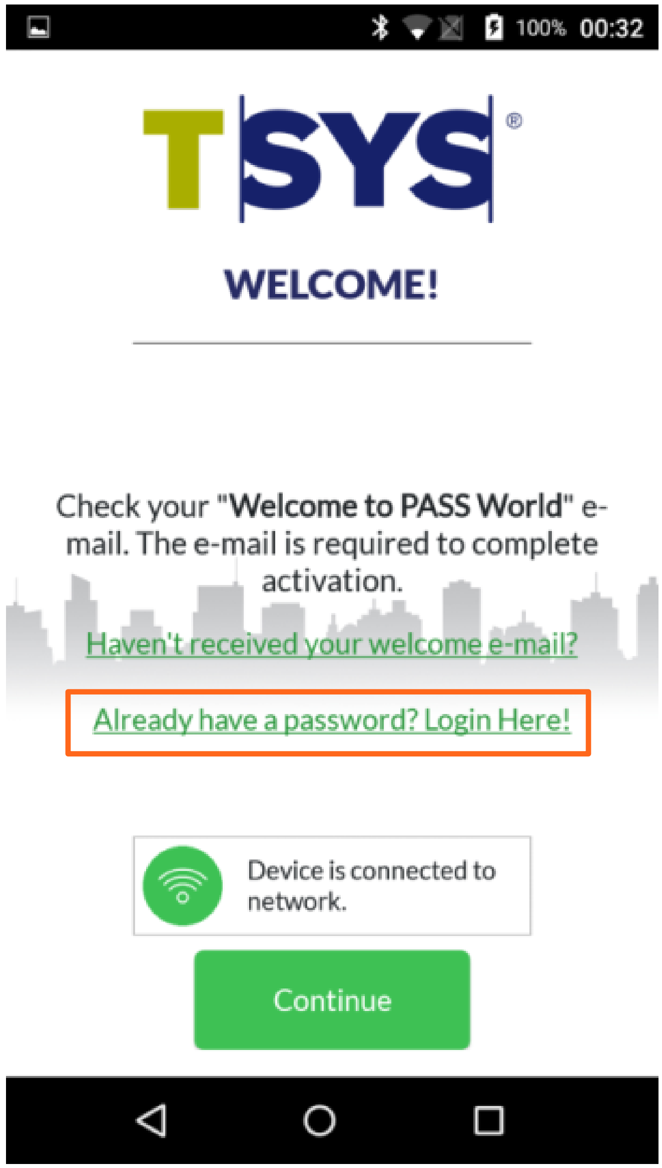
After you activate and create a PIN, you normally only need to enter the PIN to access the application.



If you tap the forgot PIN button, and see the message, "Admin PIN Cannot be Reset", you will need to clear all application data for Payments 3.0 through Device Settings and Log back in to the application.

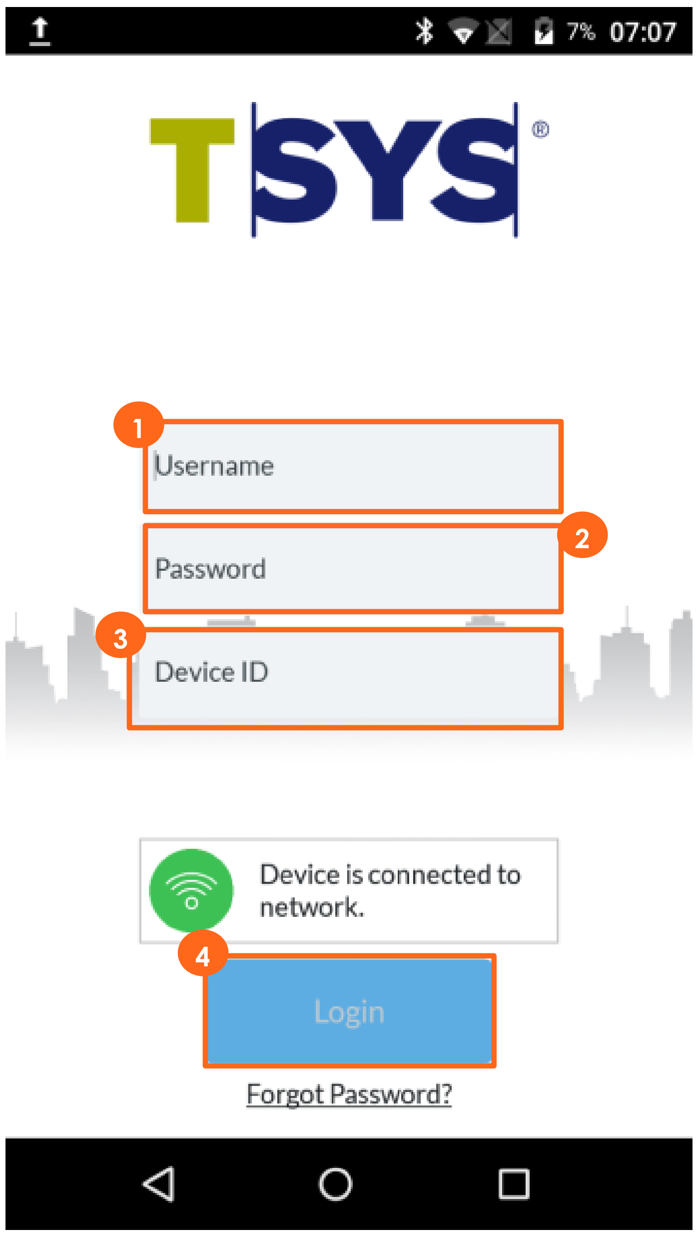
Login to Your Account

If you have already activated tap the **Already have a password? Login Here!** link to log in.



A login screen displays. Enter your login information.

1. Enter your TA# in the **Username** field
2. Enter your **Password.**
3. Enter the Device ID. This is your 12 digit merchant number followed by the two digit device ID.
4. Tap **Login**.



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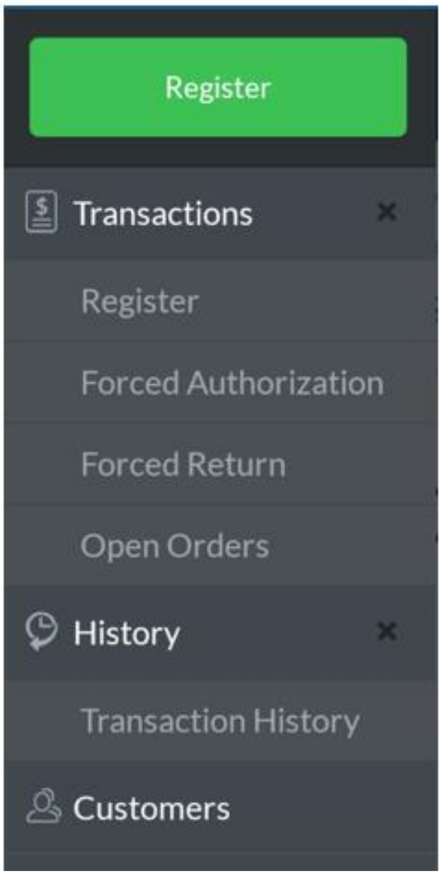
The Main Menu

The Main Menu of MPA application gives you access to all of the features that allow you to customize transactions, view sales data, manage product inventory, manage customer information, and view or update settings. You can access the Main Menu from anywhere in MPA by tapping the upper-left corner of the screen.



The following are the features and functionality accessible from the main menu:

Transactions

- ***Register –*** Perform a quick sale.
- ***Forced Authorization –*** enter a previously obtained authorization code from the issuing bank for a customer's transaction.
- ***Forced Return –*** Force a refund for a customer for a specific amount.
- ***Open Orders –*** View, search or cancel open orders.

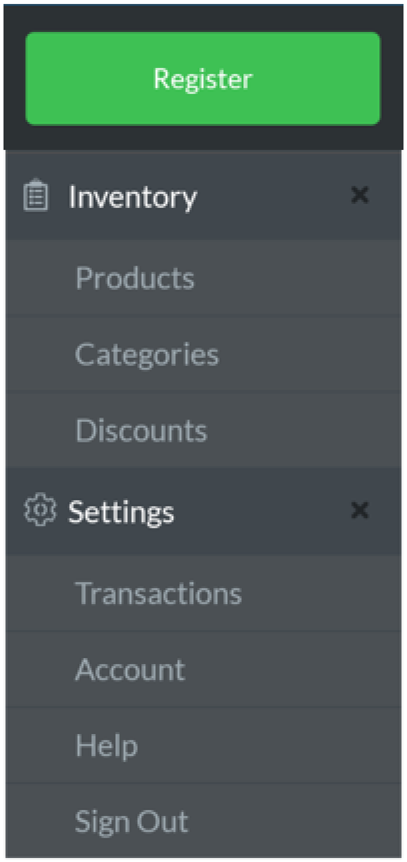
History

- ***Transaction History –*** Filter and search transaction history; view individual transactions; initiate returns from the transaction details in transaction history.

Customers – Add, view, search and edit customer records.

Settings

- ***Transactions –*** View, add and modify tax rate, tip settings, signature requirements, and invoice numbers; enable or disable auto-processing of offline transactions (For more info see Offline Payments Section of this User Guide.)
- ***Account –*** View processing summary, account summary, and the current application version. Change your password and sign out of the application from here.
- ***Help –*** View support information.
- ***Sign Out –*** Sign out of the application.



Inventory

- ***Products –*** Create, view and edit your products.
- ***Categories –*** View, add and edit product categories.
- ***Discounts –*** View, add and edit your discounts.

Settings

- ***Transactions –*** View, add and modify tax rate, tip settings, signature requirements, and invoice numbers; enable or disable auto-processing of offline transactions (For more info see Offline Payments Section of this User Guide.)
- ***Account –*** View processing summary, account summary, and the current application version. Change your password and sign out of the application from here.
- ***Help –*** View support information.
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Settings, Account Information, and Help

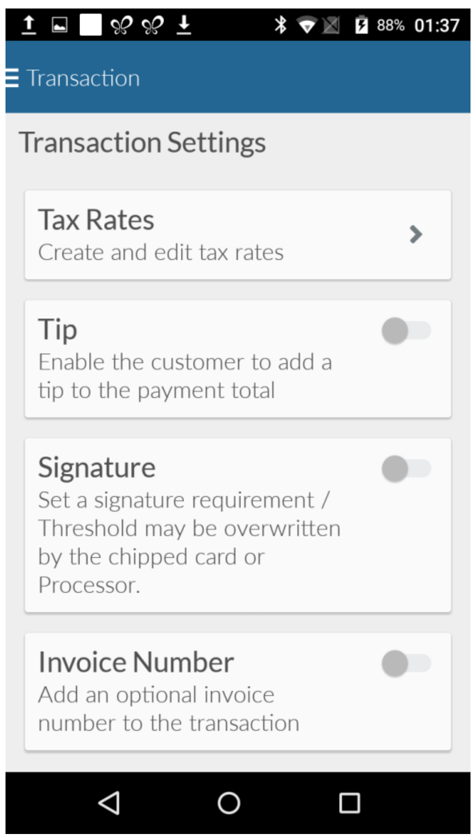
Manage Settings

Mobile Payment Acceptance is customizable, allowing you to choose the transaction settings that best fit your business needs. You can access and change settings from the Main Menu.

Transaction Settings

The Transactions option under Settings gives you access to the following functions:

- Create or edit a tax rate
- Enable and edit the tip feature
- Set requirements for a signature
- Add invoice numbers to your transactions

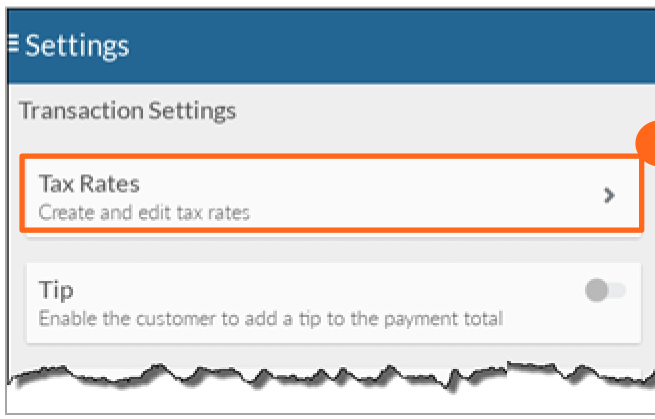


Settings Page

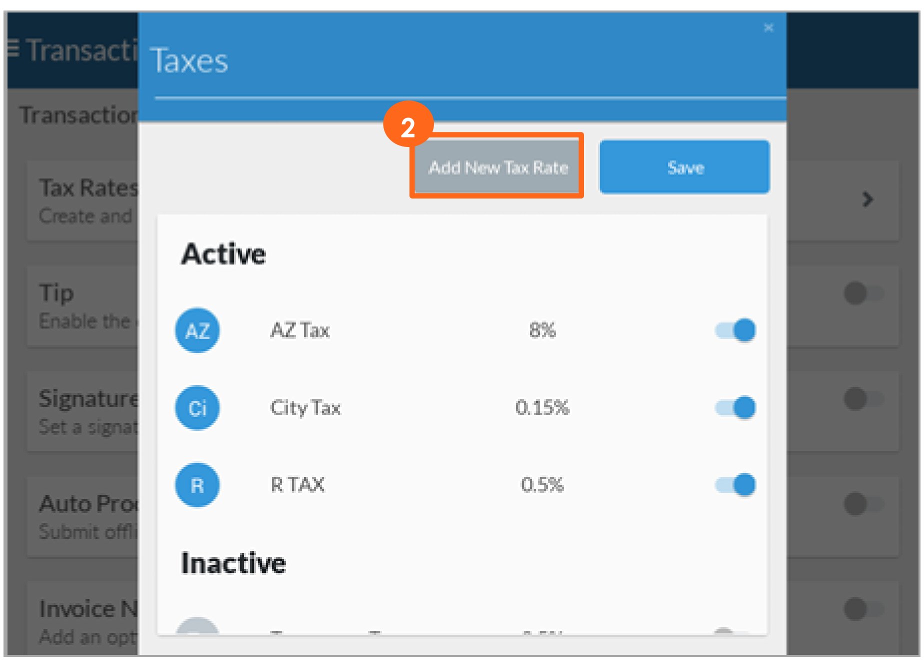
Create a New Tax Rate

There are two types of tax rates: global taxes, which are applied to all products by default, and individual taxes, which must be assigned to each product. Global taxes can only be created in Merchant Center, whereas individual tax rates can be created in both Merchant Center and MPA—for more information on creating global taxes, see the Back Office-Merchant Center section in this guide. Once you have added a tax rate, you can apply it to the products in your product list. Up to 20 tax rates can be applied to a product at one time. Note that tax rates can be added, edited, and turned on or off, but they cannot be deleted.
To create a new tax rate:

1. Tap **Tax Rates**.

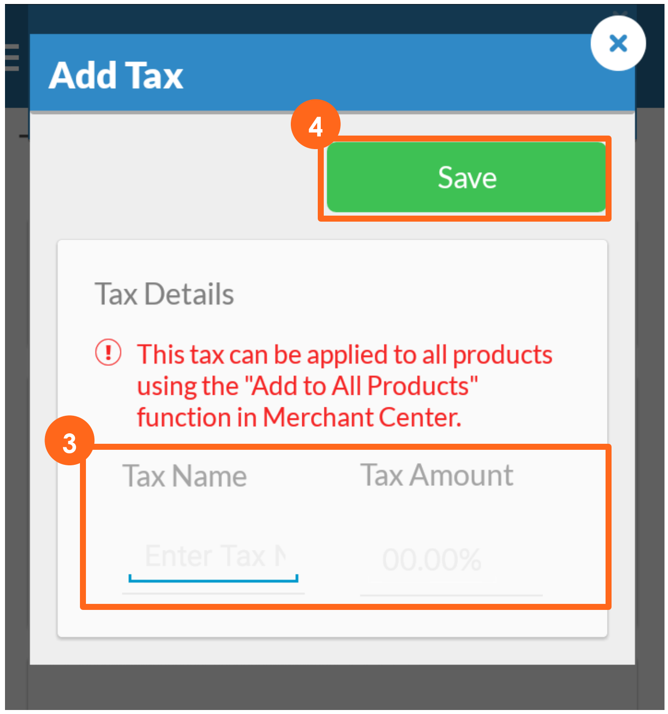


2. Tap **Add New Tax Rate**.

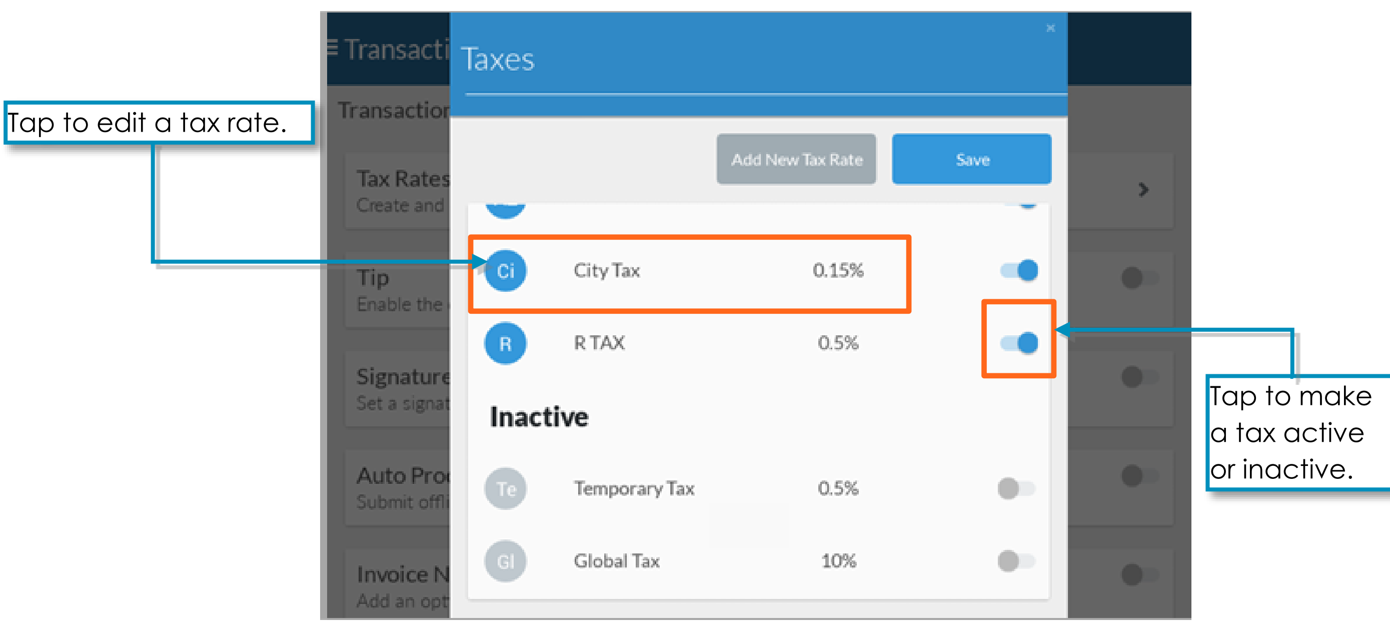


3. Assign the new tax a name and a value.

4. Tap **Save**.



Once a tax has been created, you can tap it to make changes or tap the slider on the right to make it active or inactive. You can apply active taxes to products from the Products page.



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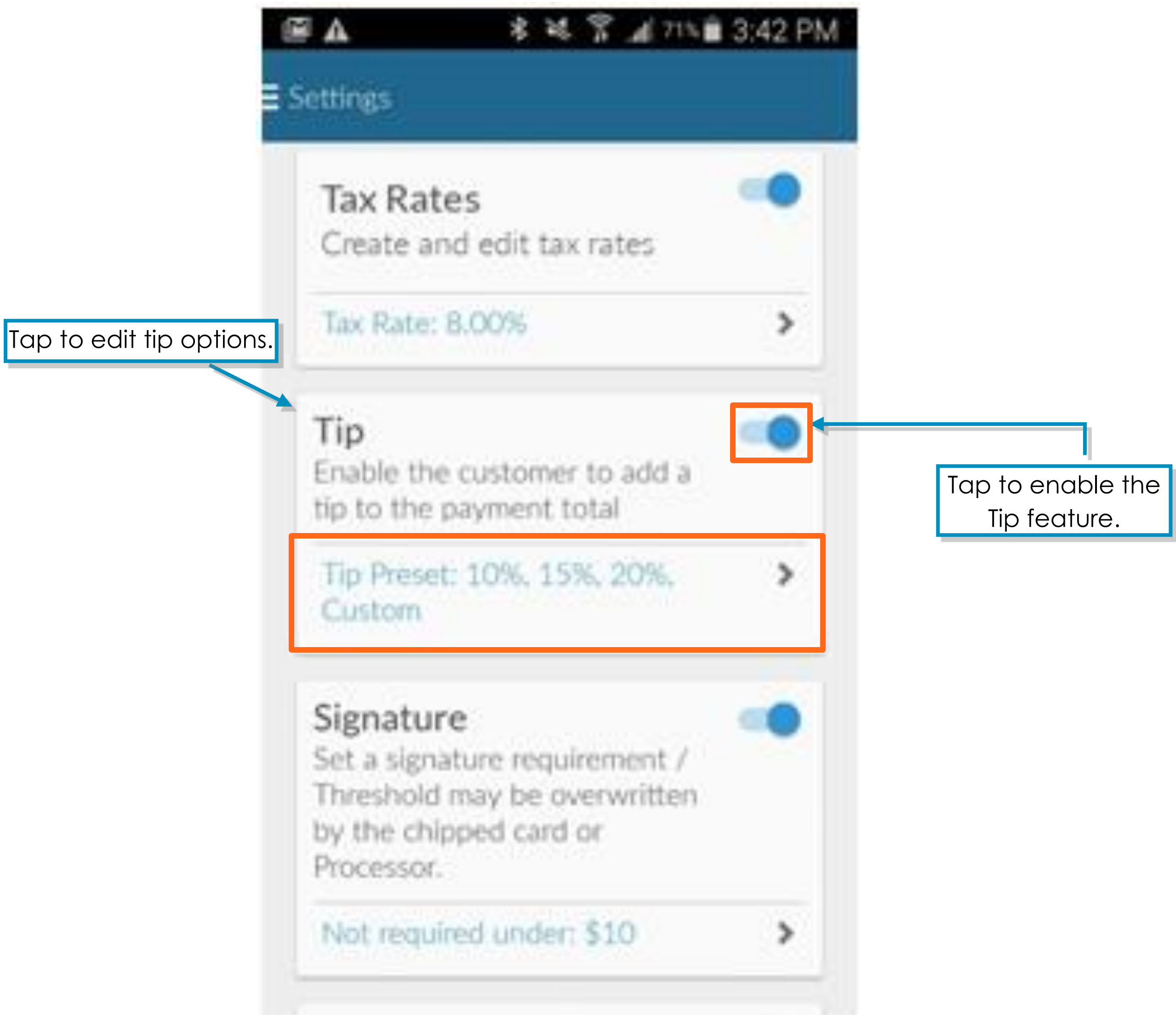
Enable Tips

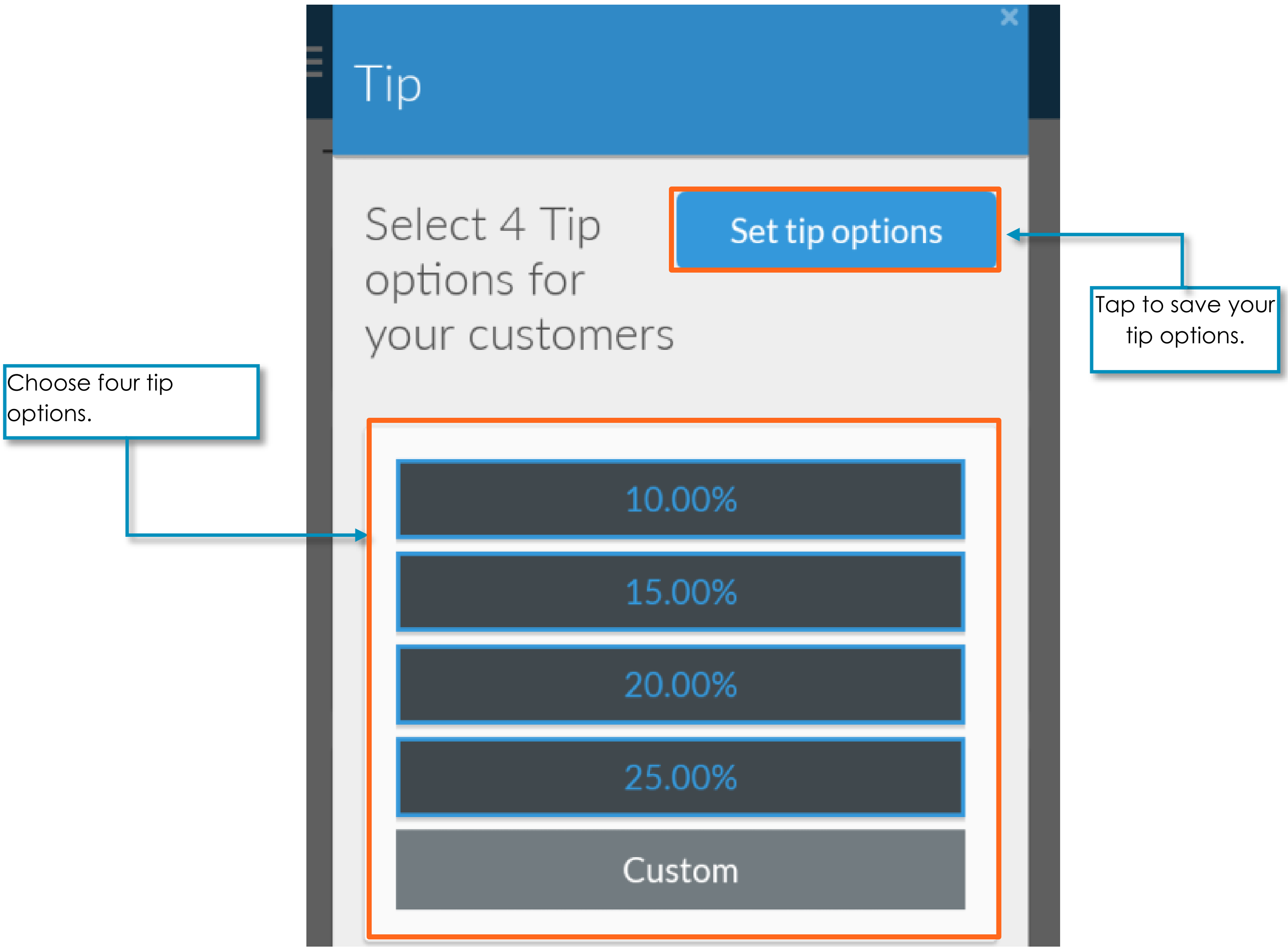
If you want to be able to accept tips in your business, turn the Tip feature on from the Transaction Settings. You may set four tip options. A Custom option is available to allow your customers to set their own desired tip amount or percentage. Select four tip options to display to your customers.

When the Tip feature is turned on, your receipt will always include a signature line, regardless of any signature limit setting.

Settings Page



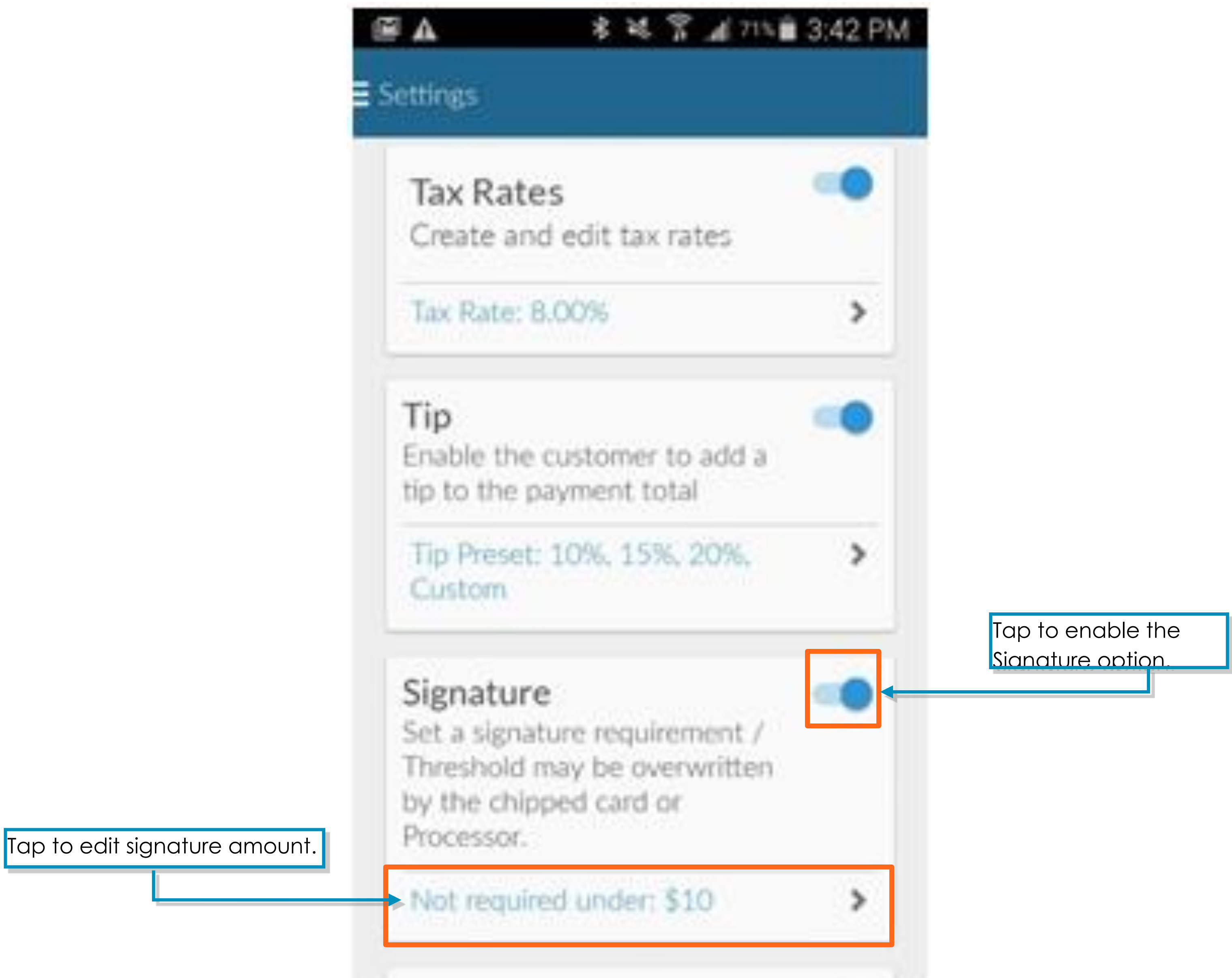
Tip Settings



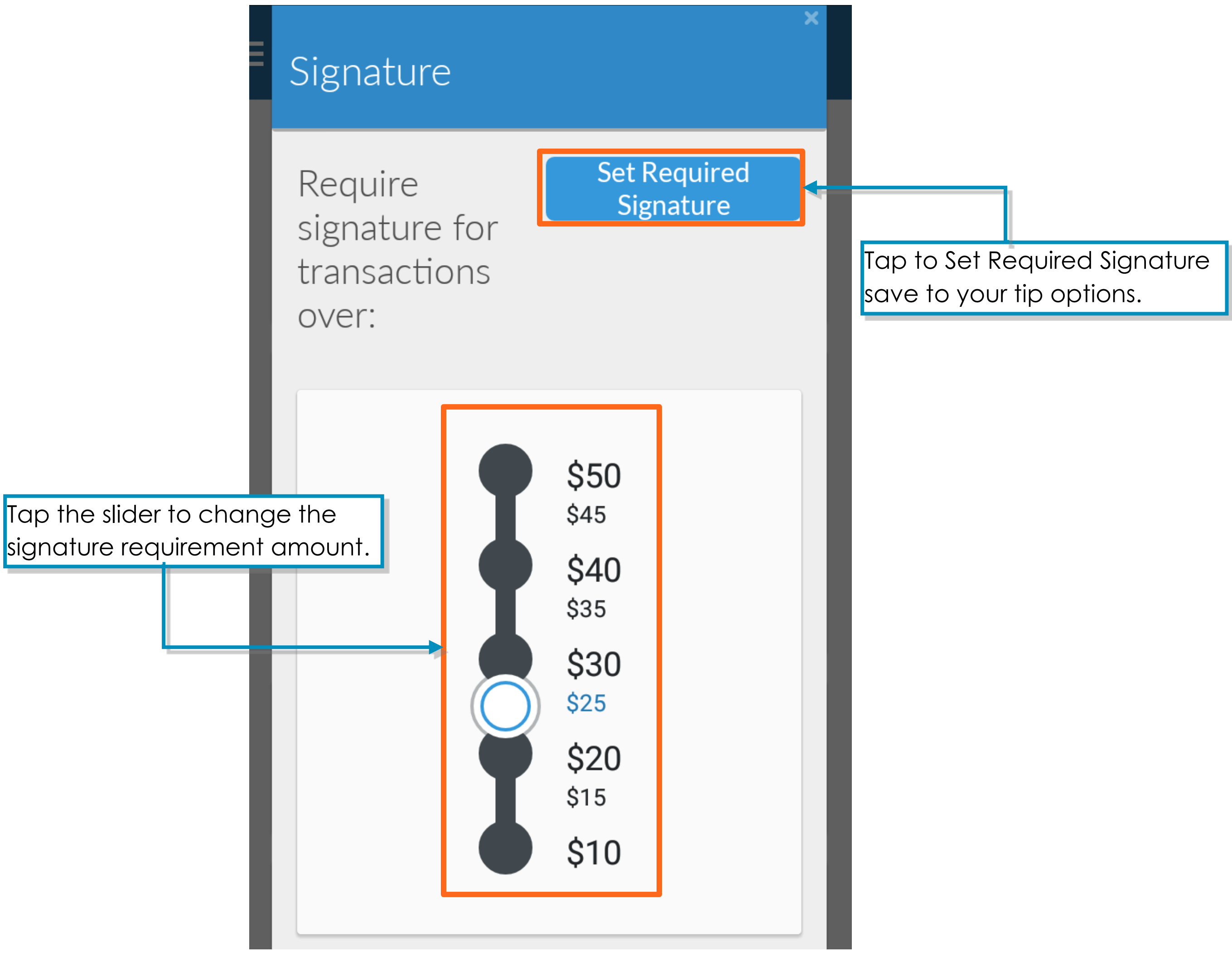
Set Amount for Signature

Mobile Payment Acceptance lets you set the maximum transaction amount you will accept without a signature. This amount may be overwritten by the processor, chipped card or if you have enabled tips. If you do not set a limit, the application will not require a signature unless the setting is overwritten. Requiring a signature for higher dollar transactions will help limit your financial risk.

Settings Page



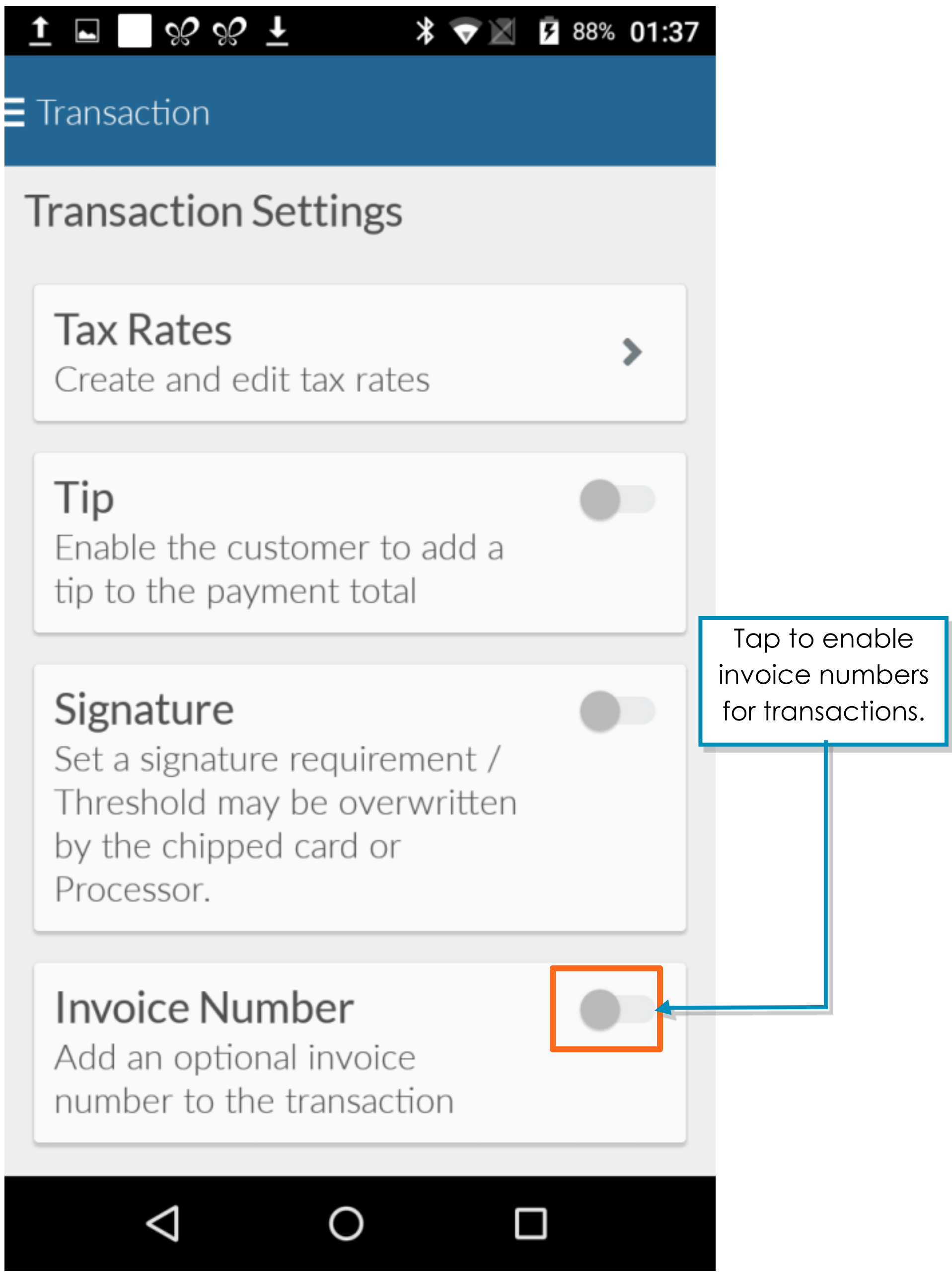
Signature Settings



Enable Invoice Numbers

Adding Invoice Numbers to transactions is another option you may choose. Simply turn on the **Invoice Number** feature under Transaction Settings and you will begin seeing a field for invoice numbers every time you process a transaction. The invoice number is user-defined. If a number isn't entered, the transaction ID will be used as a default.

Settings Page



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View Account Information

The Account page gives you a quick view of the transaction amount you have processed in the last 15 days and the last 30 days, the amount still pending settlement, some basic account information like your username, and the current application version you have installed on your device.

You can also change your password or sign out of the application from this screen.

Account Page

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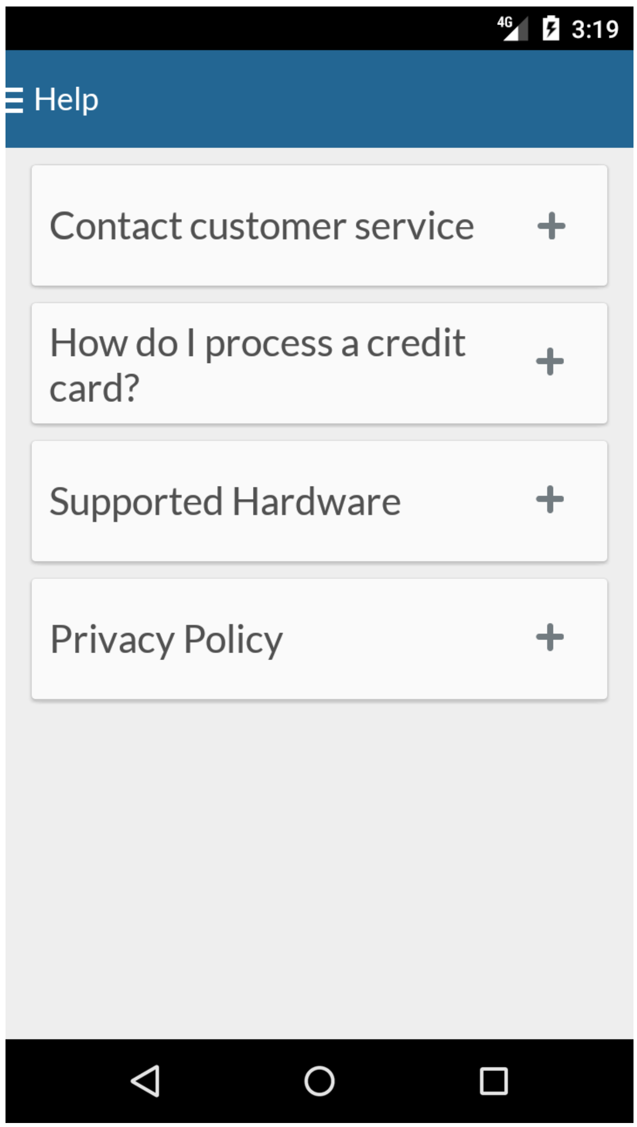
Help

If you need help, you can access the Help page from the Main Menu. The Help page provides you with customer service contact information, a brief explanation of how to process a credit card, and a link to the privacy policy.

Help Page



Products, Categories, Discounts and Customers

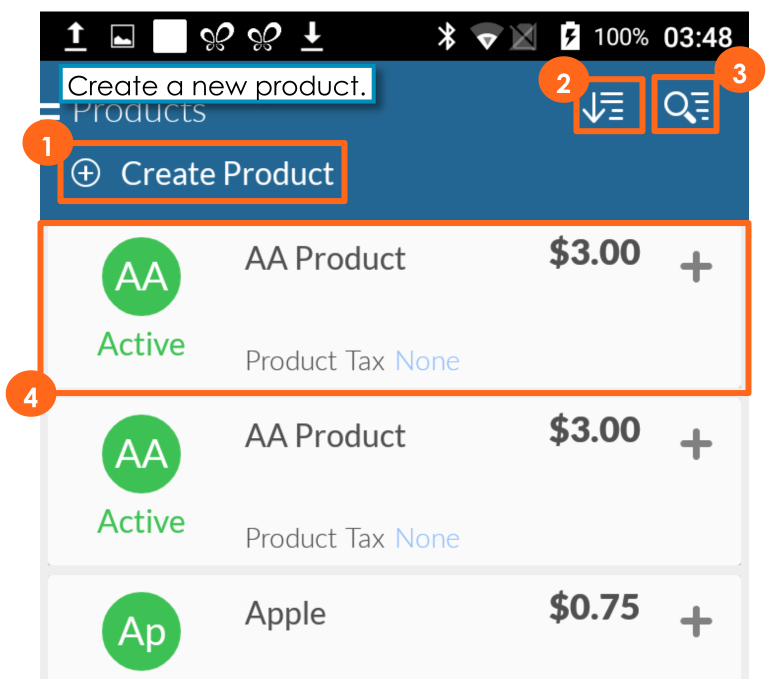
Viewing Products

Your Products page serves as an inventory of all your products and services. It contains your product names, their descriptions and categories, and any associated discounts and tax rates. Managing your products is simple and helps you keep your inventory updated and organized. You can access the Products page any time from the Main Menu.

The Products page is equipped with filter and search features so you can find products easier. You can also sort each column in ascending or descending order.

1. Tap **Create Product** to create a new product.
2. Tap the down arrow to sort products.
3. Tap the magnifying glass to filer and search for products.
4. Tap an individual product to display or edit the product details.

Products Page

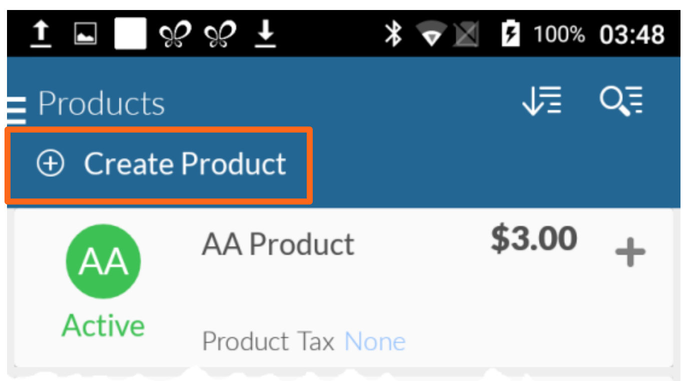


Add a Product

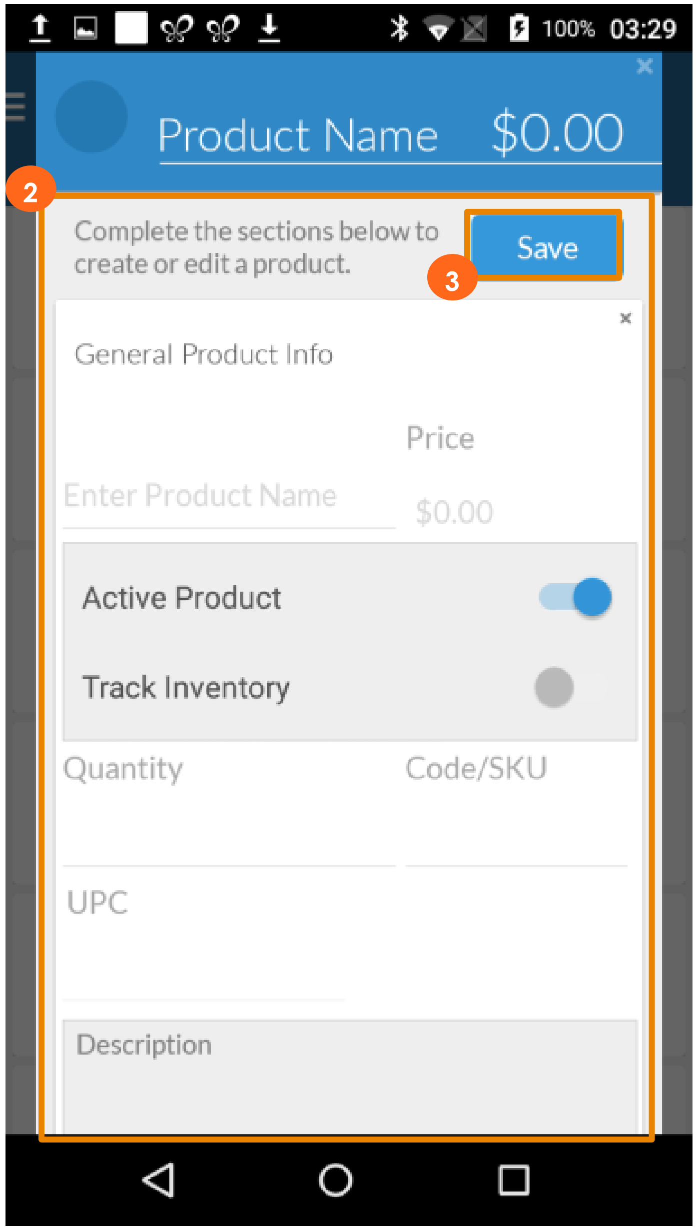
Mobile Payment Acceptance allows you to add as many products as you wish. When you add a new product, you can assign identifying information, tax rates, discounts, categories, and quantity for the product. Taxes, discounts, and categories must already have been created in order for them to be assigned to a product. Make sure to enter a UPC for all items you want to scan—if a UPC is not attached to a product and you try to scan it, the application will tell you the product does not exist. Additionally, if you do not wish to track quantity for a product, such as a service or membership, do not modify the quantity—this will treat the supply of that product as infinite. All the information will be saved to your product list. Note that product variations and modifiers can only be added and modified in Merchant Center; see the Back Office-Merchant Center section of this guide for more information on product modifiers and variations.

To add a new product to your product list:

1. Tap **Create Product**.



2. Enter the appropriate product information, and assign available taxes, discounts, and categories. Product name, price, and Code/SKU fields.



Tap **Save** to create the product and return to the Products page.

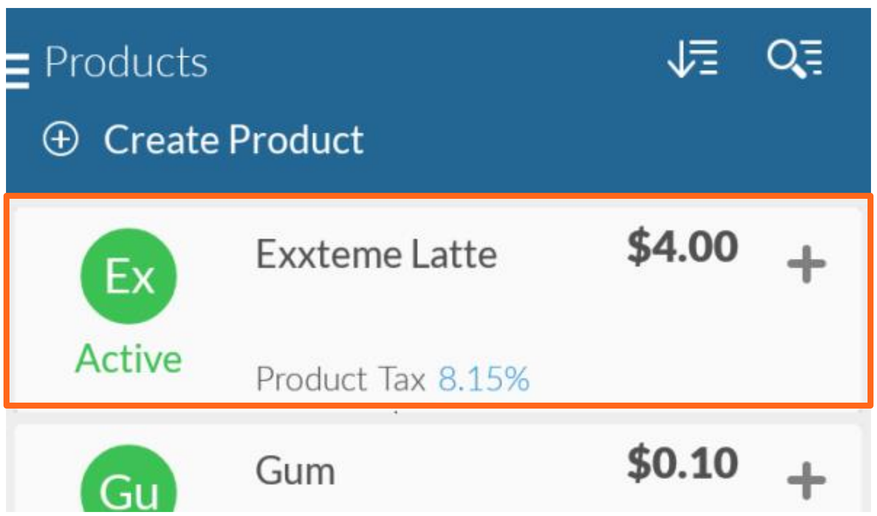
Remove a Product

You may have seasonal products that you do not sell all the time. Change a product's status to inactive so it is no longer visible in your product list but remains on an inactive list. You can make the product available for sale again at any time by changing its status back to active. Products can also be permanently deleted.

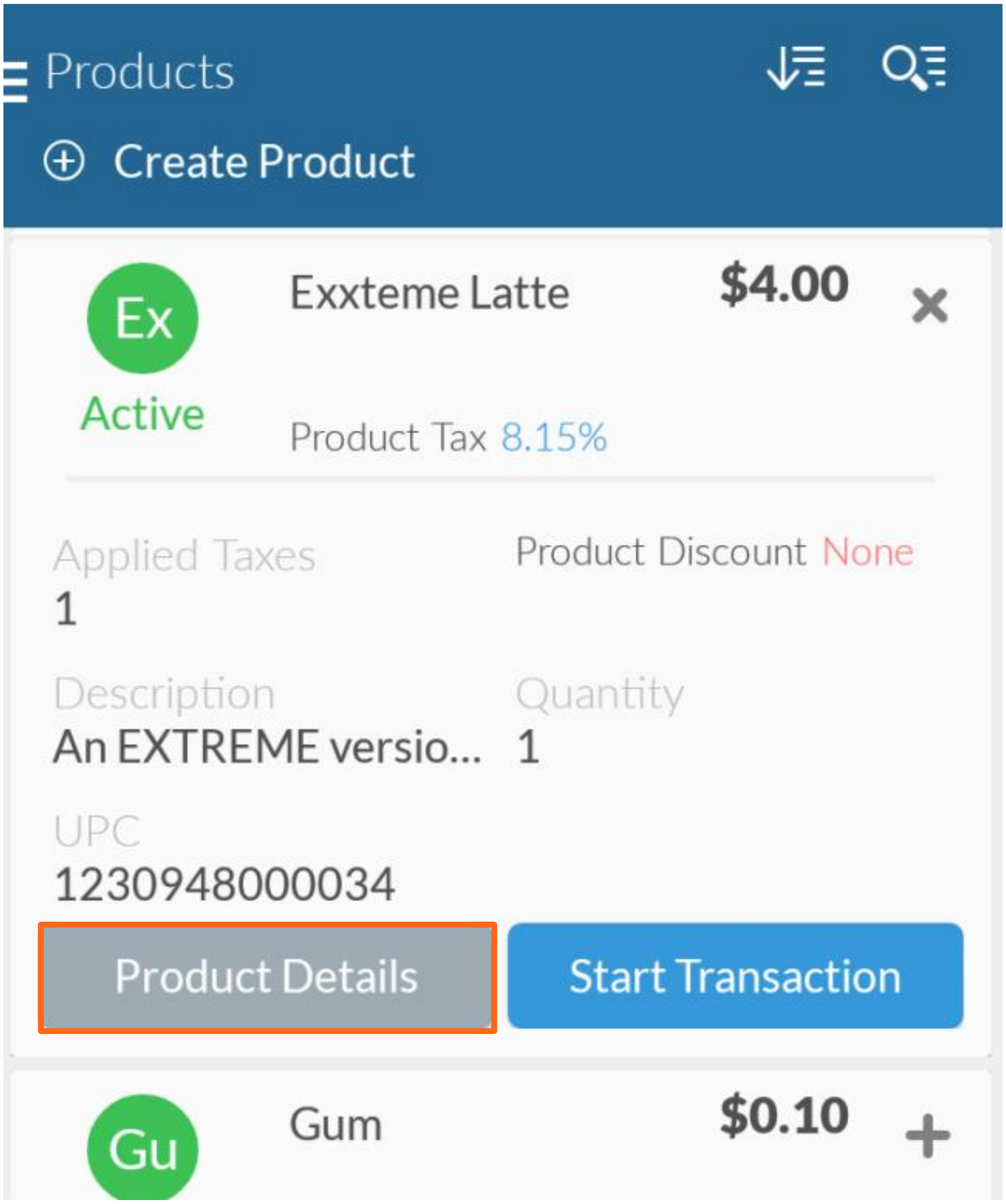
Change the Status of or Delete a Product

To deactivate a product from your product list:

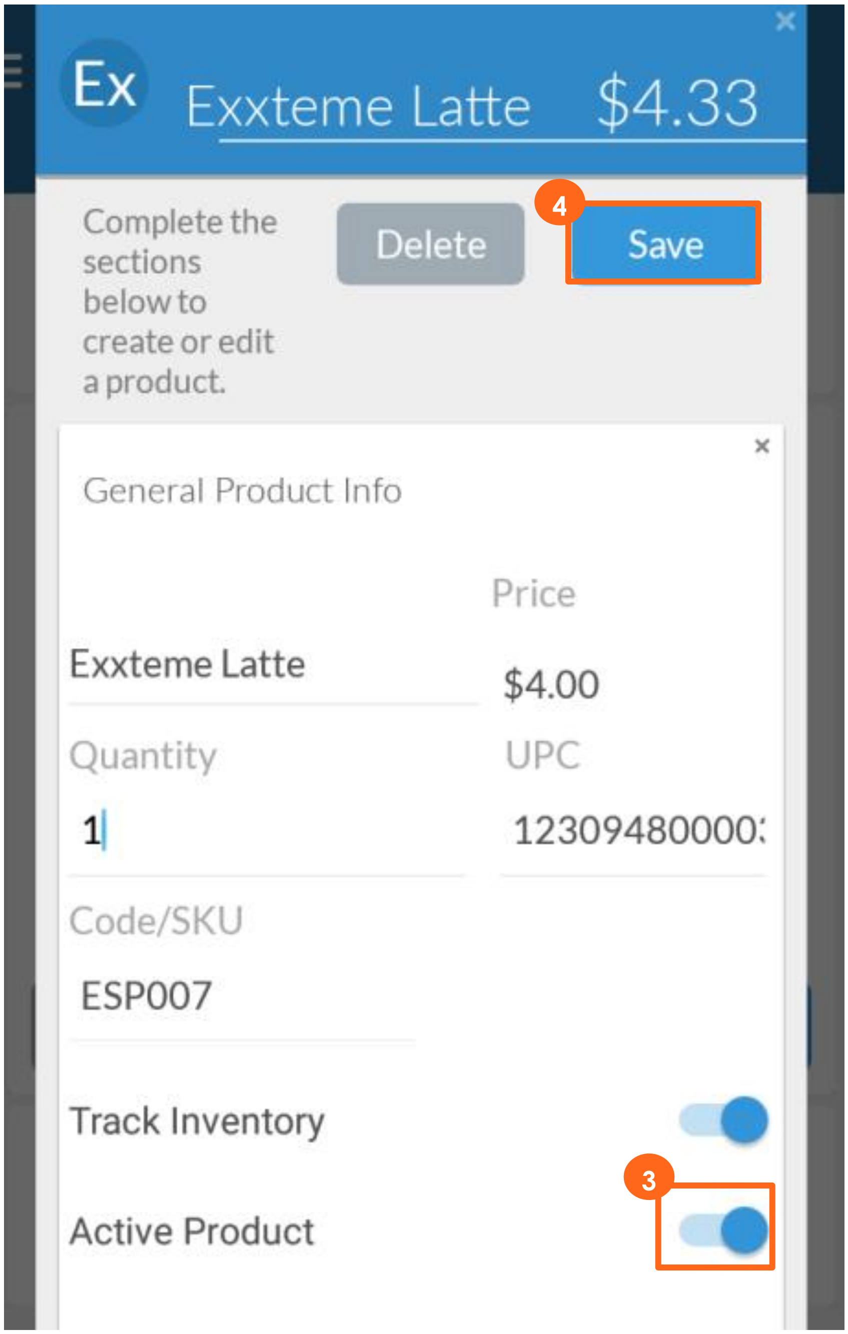
1. Tap the product you wish to modify.



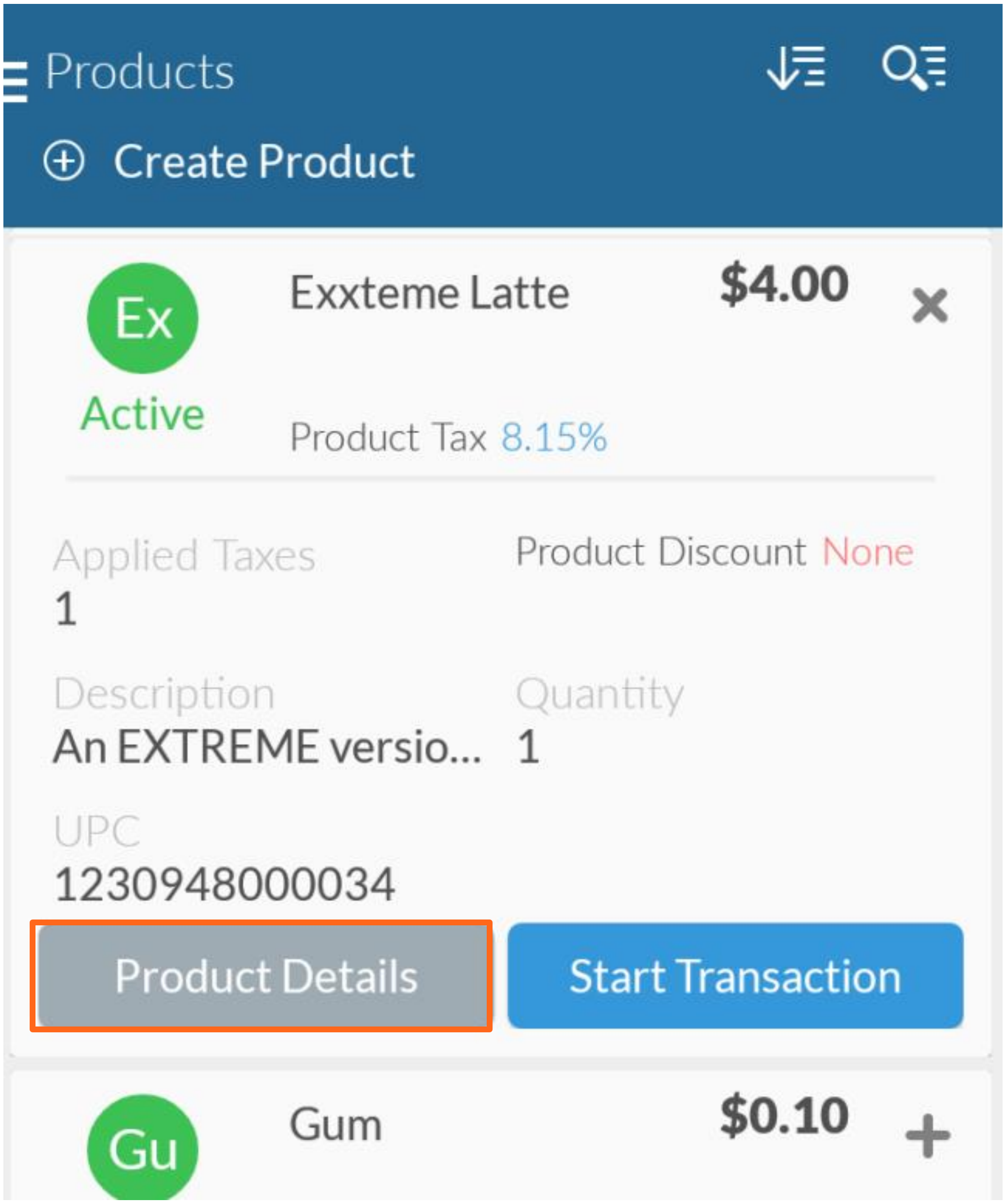
2. Tap **Product Details**.



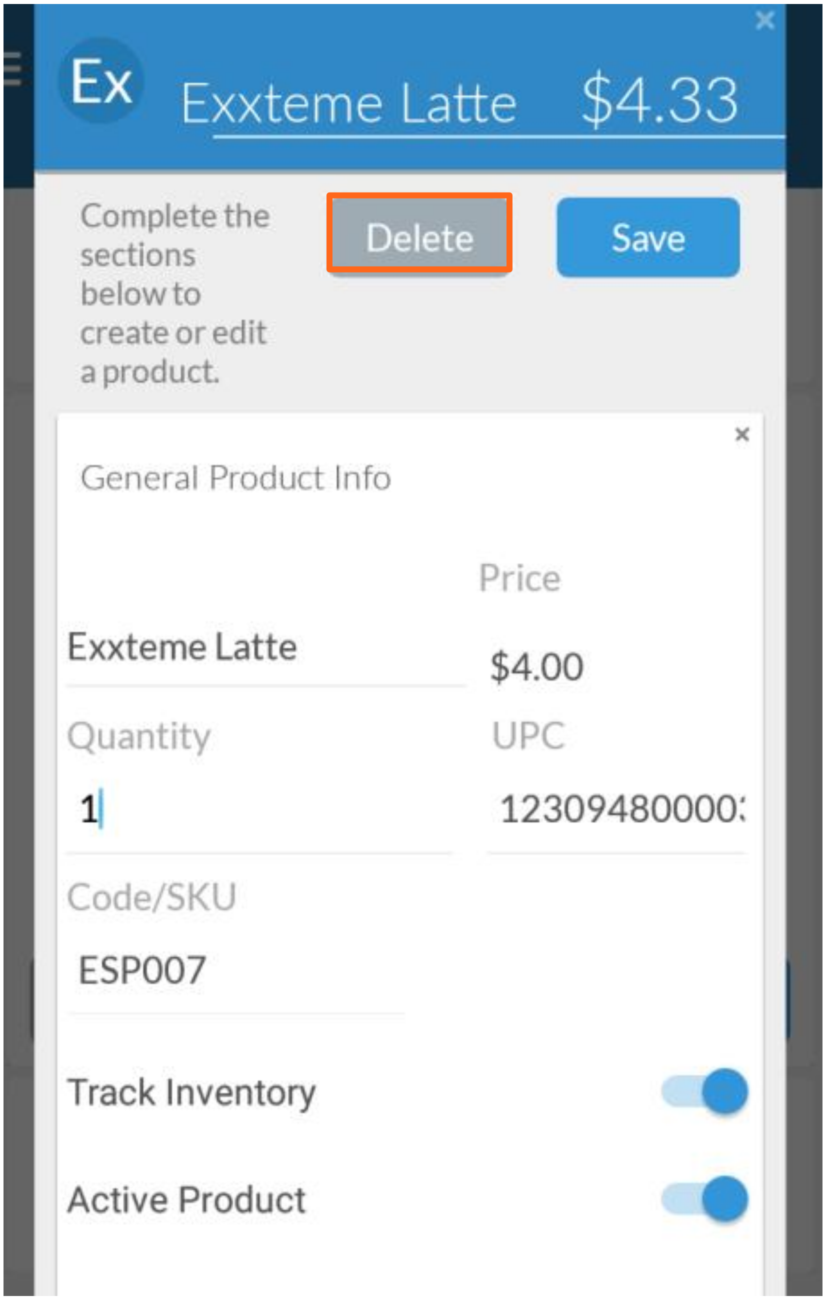
3. Tap the **Active Product** slider to make a product active or inactive.
4. Tap **Save**.



5. Tap **Product Details**.



6. Tap **Delete** and confirm your decision to permanently remove the product.



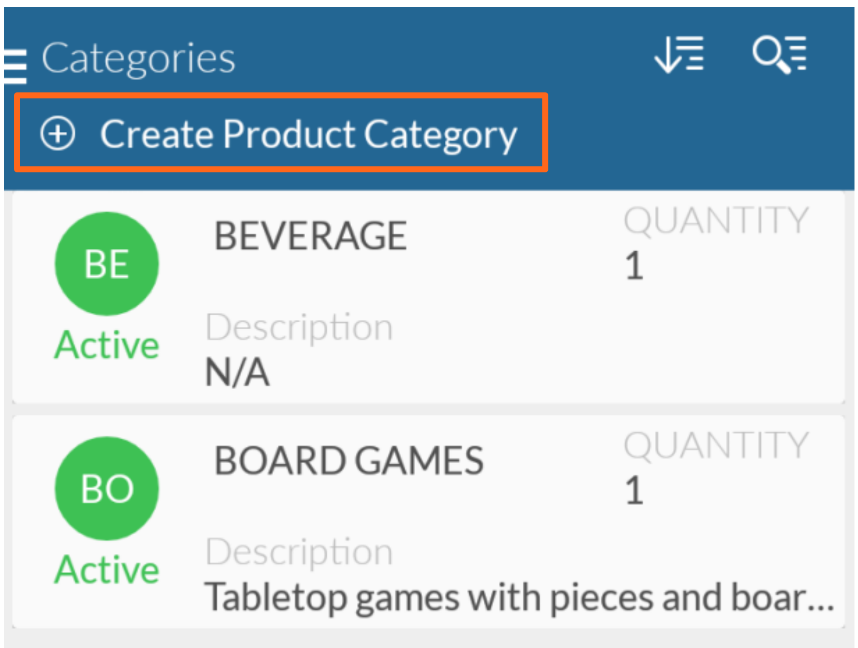
Categories

You can use categories to organize your inventory for more efficient transactions. Products can be assigned to one or more categories, or you can choose not to assign a category at all. However, products viewed in the Register are organized by category, so if no category is assigned it will only appear under the **All Products** category. You can create and modify categories from the Categories page, which is accessible from the Main Menu.

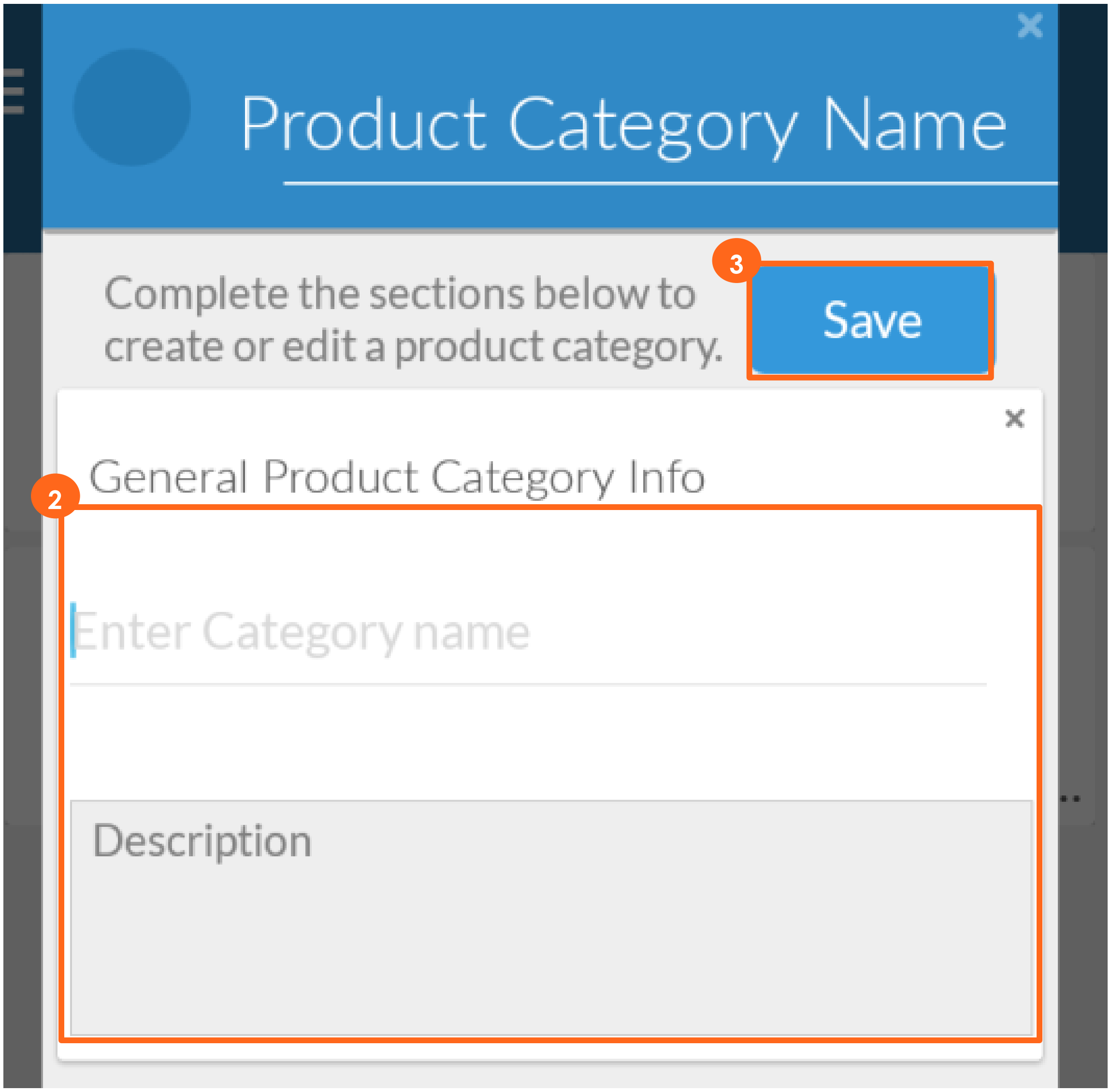
Create a New Category

To create a new category from the Categories page:

1. Tap **Create Product Category**.



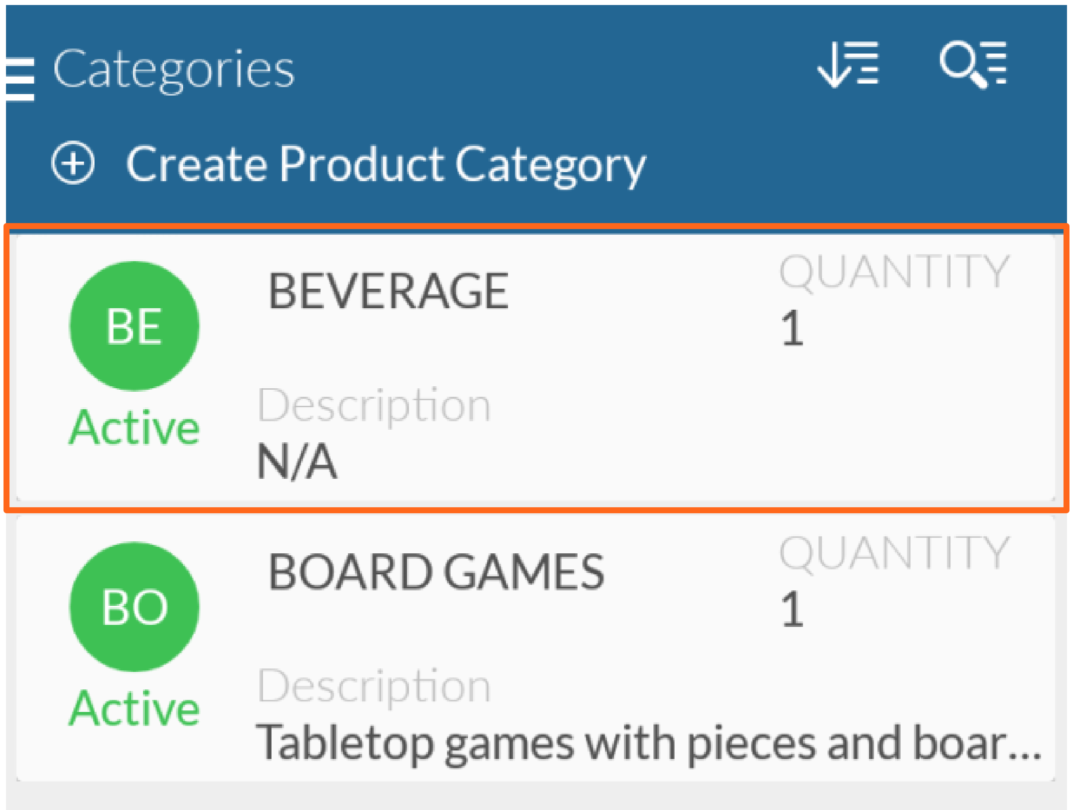
2. Enter a category name and description.
3. Tap **Save**. Product categories become active by default.



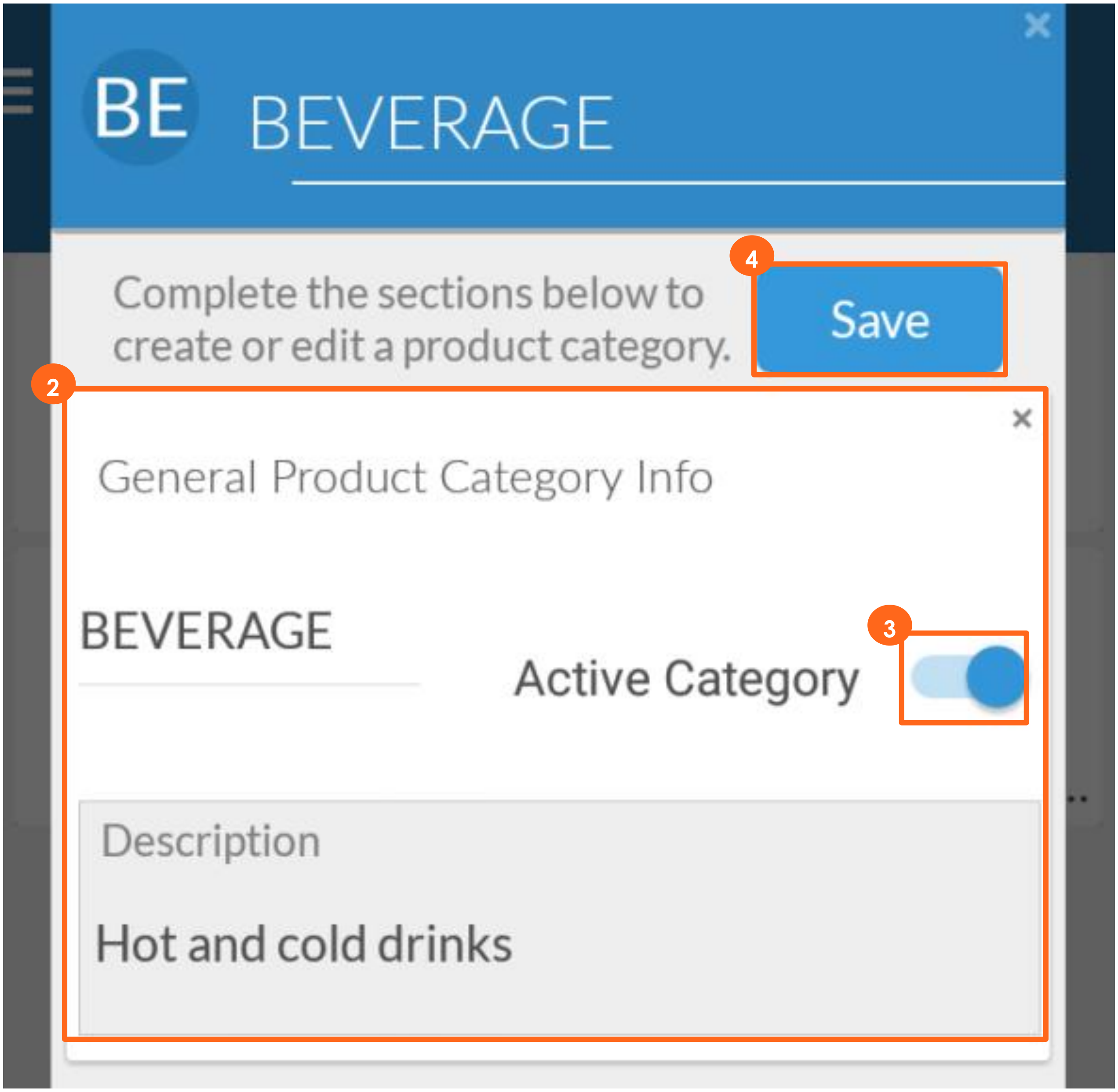
Modify an Existing Category

To modify an existing category from the Category page:

1. Tap the category you wish to modify.



2. Modify the product category name and description fields as needed.
3. Tap the slider to activate or deactivate the product category.
4. Tap **Save**.



Note: Disabling an active category will cause it to no longer display in the register. Any products that are assigned to that category will still display under the **All Products** category.

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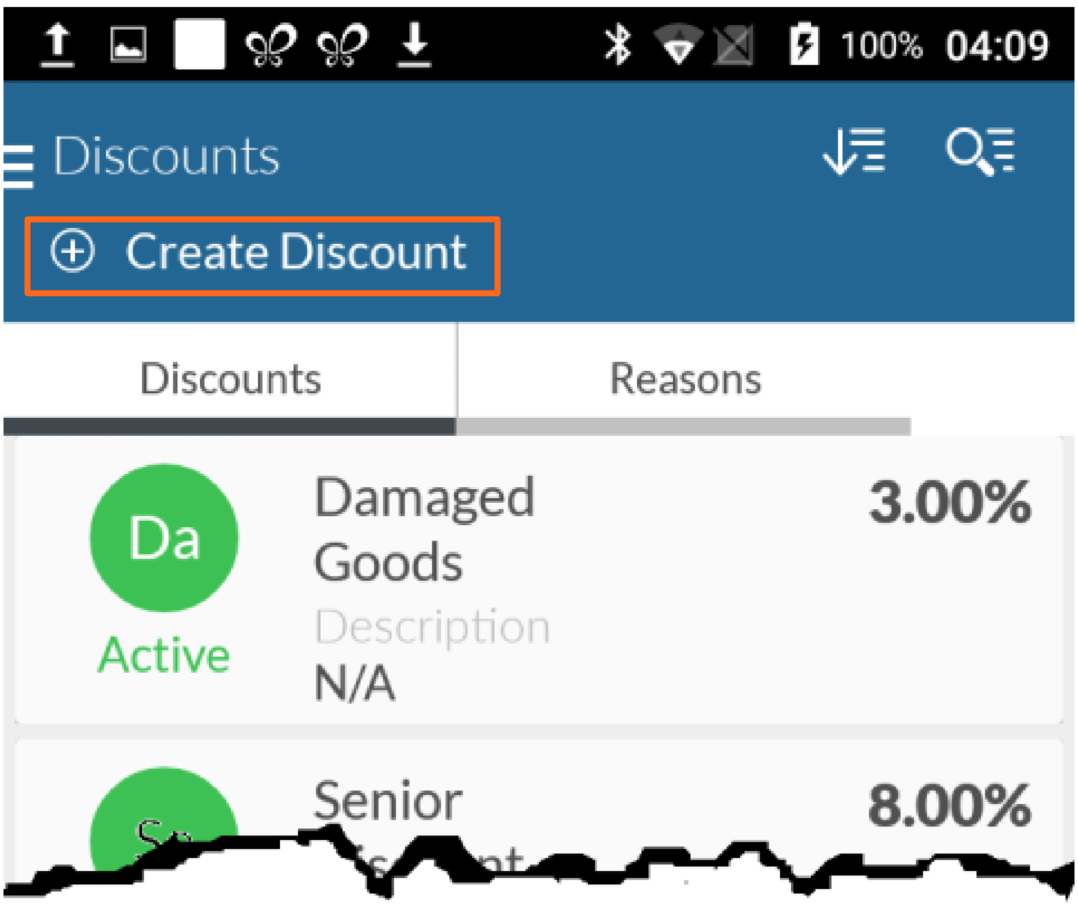
Discounts

You may wish to discount certain products for promotions or other reasons. MPA gives you the flexibility to assign single discounts to products in your product list or multiple individual and cart level discounts to an order. Discounts can be for a dollar amount or a percentage, and you can make discounts active or inactive similar to products in your inventory. You can create and modify discounts from the Discounts page, which is accessible from the Main Menu.

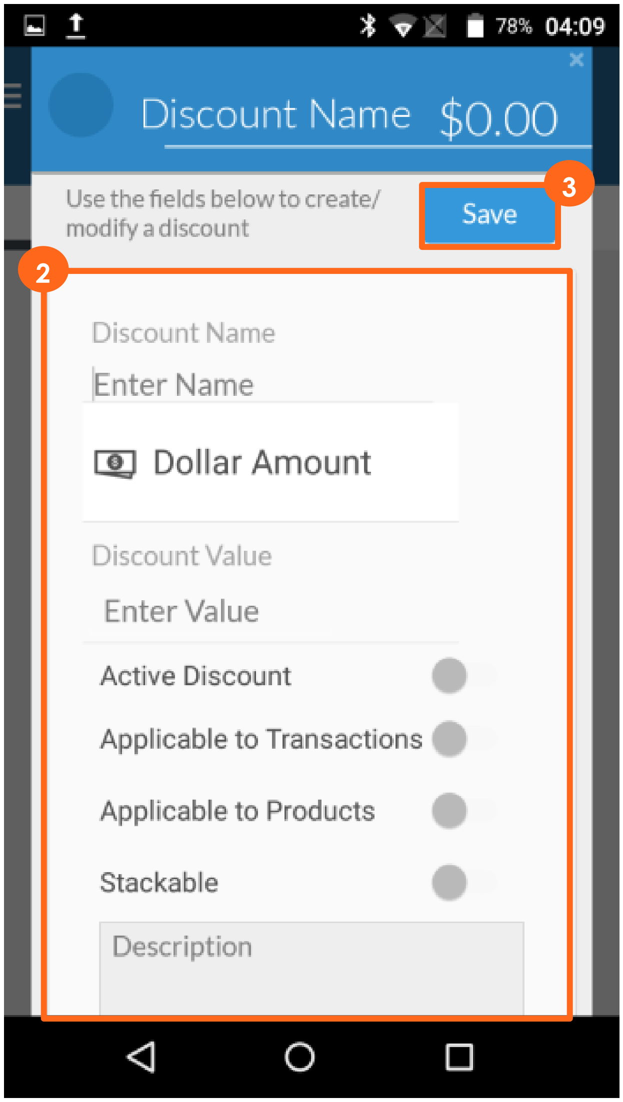
Create a Discount

To create a discount:

1. Tap **Create Discount**.



2. Enter a discount name, value, and description, and customize it using the sliders on the right. A discount can be limited to products or transactions or made available to both. A stackable discount can be added to a product or transaction along with other discounts. Making a discount non-stackable means that it cannot be combined with any other discount.

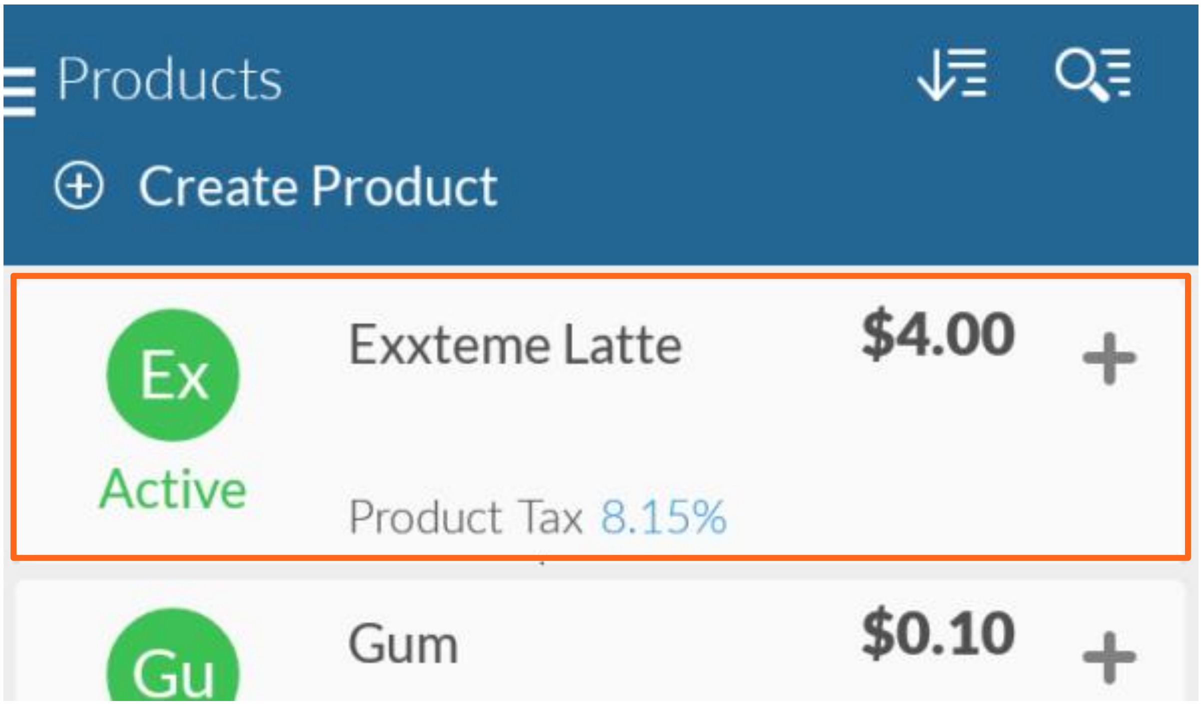


3. Tap **Save**. If you have not entered the appropriate information, you may not be able to proceed.

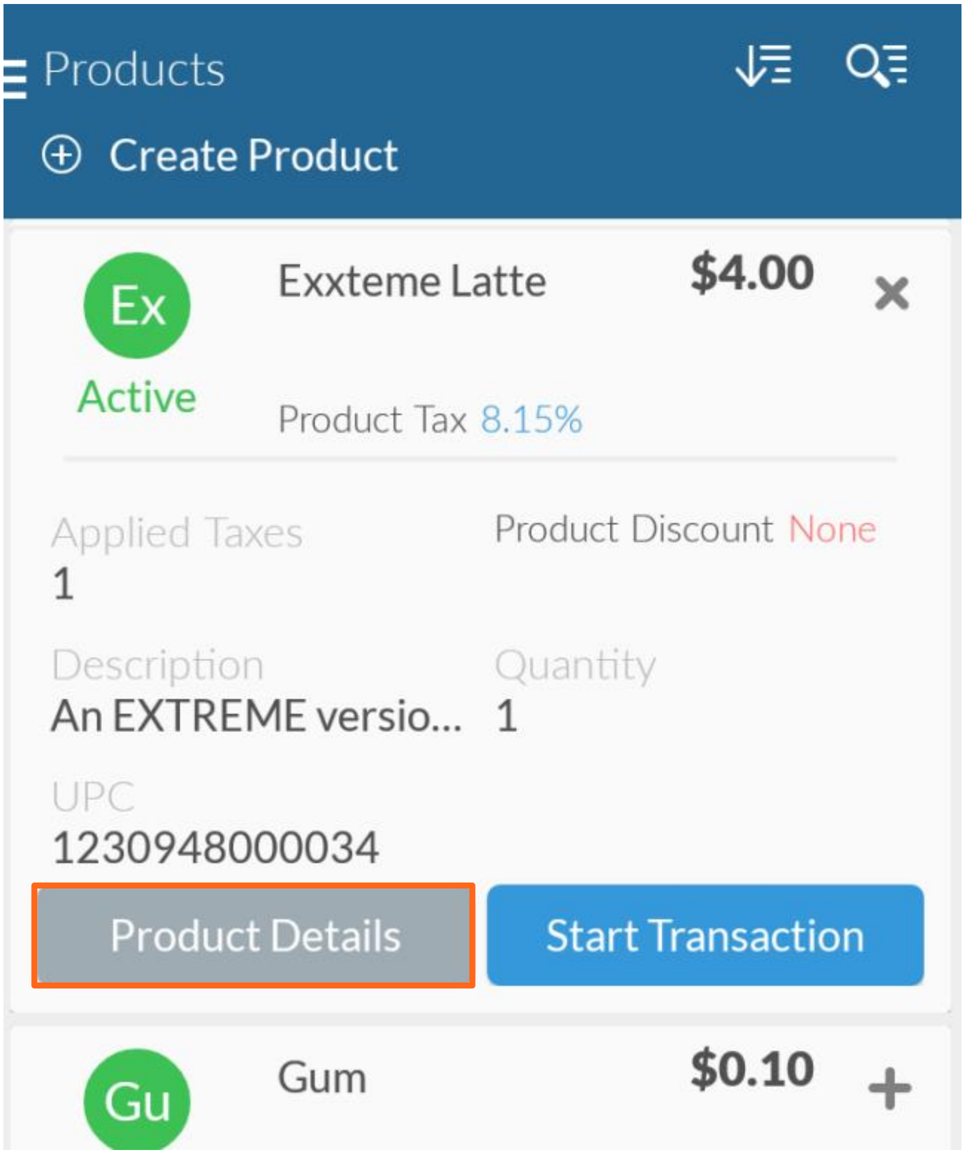
Add a Single Discount to a Product

When discount is added to a product in the Products page, every time that product is added to a transaction, that discount will automatically be applied. To add single discounts to products from the Products page:

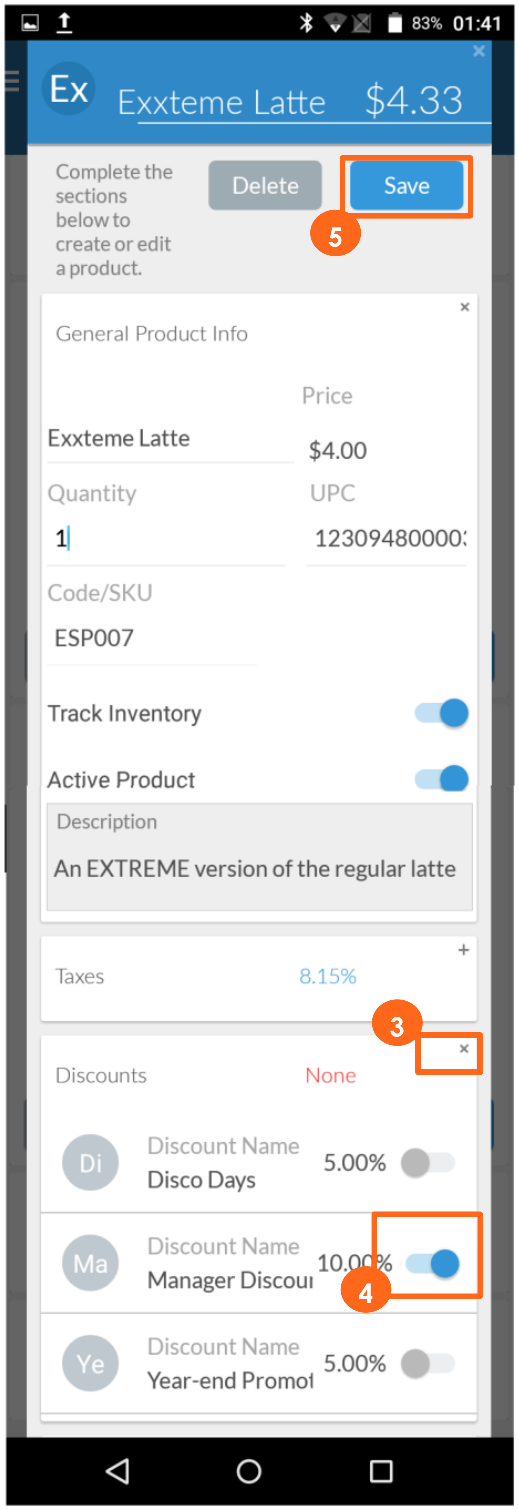
1. Tap the product you wish to modify.



2. Tap **Product Details**.



3. Tap the **+** on Discounts to view active and inactive discounts.



> **Note**: The '+' changes to an '**x**' while the discounts are displayed. Tap the **x** to close the discounts view.

4. Tap the slider for the discount you wish to activate.
5. Tap **Save**. The active discount will now automatically be applied when the product is added to an order.

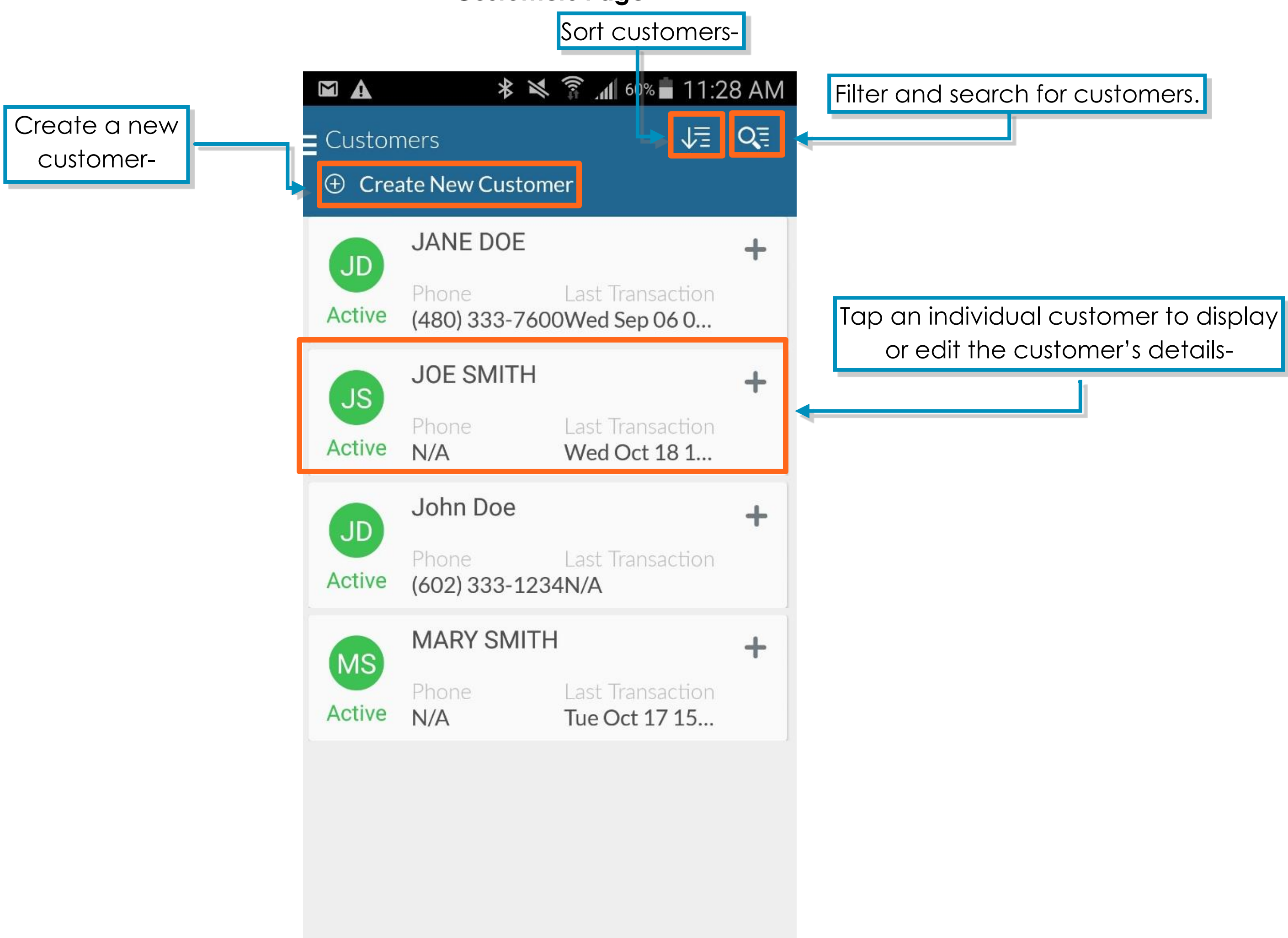
> **Note**: Only one discount can be active at a time when modifying items on the Products page. You can still add additional discounts to single products or to the entire cart during a transaction which is described in the Transactions section of this guide.

Manage Customer Information

Your business needs may require recording customer information. Mobile Payment Acceptance allows you to manage this information to provide excellent customer service. You can view, add, and edit customer information from the Customers page, which is accessible from the Main Menu.

The Customers page provides a list of all the customers you have entered, along with their information. This page is equipped with a search option and a filter to view active and inactive customers. You can also sort customers in ascending or descending order.

Customers Page



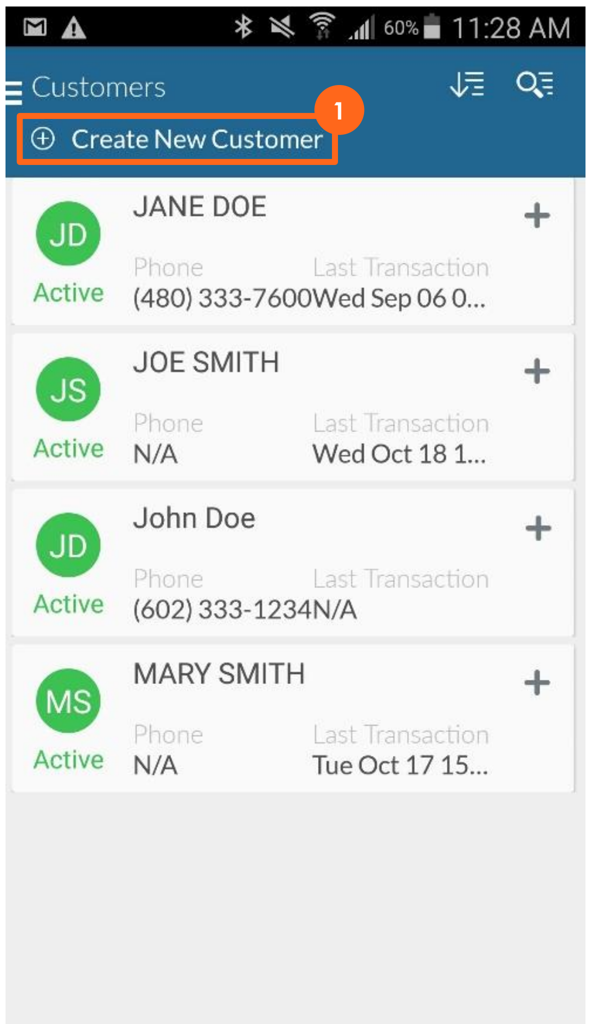
Add New Customer

You can add a customer using the Create New Customer button or by duplicating an existing customer's profile and changing the necessary information.

Create a New Customer

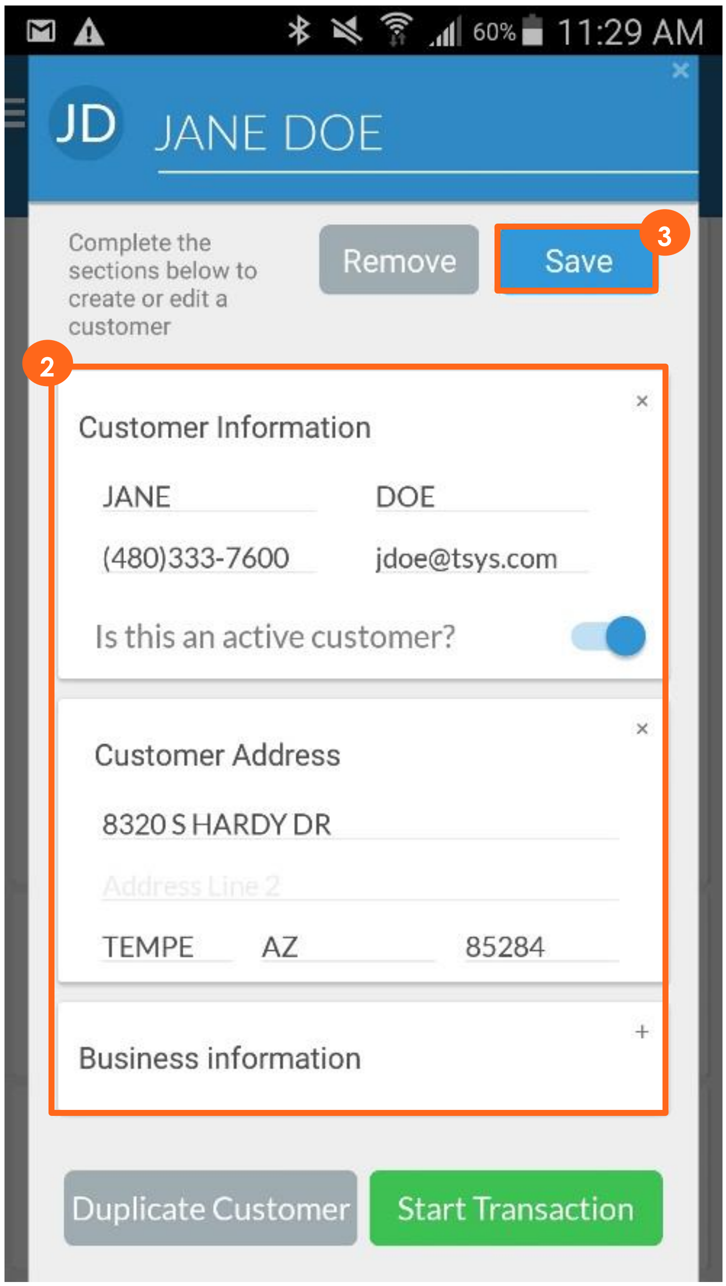
To add a new customer using the Create New Customer button:

1. Tap **Create New Customer**.



User Guide

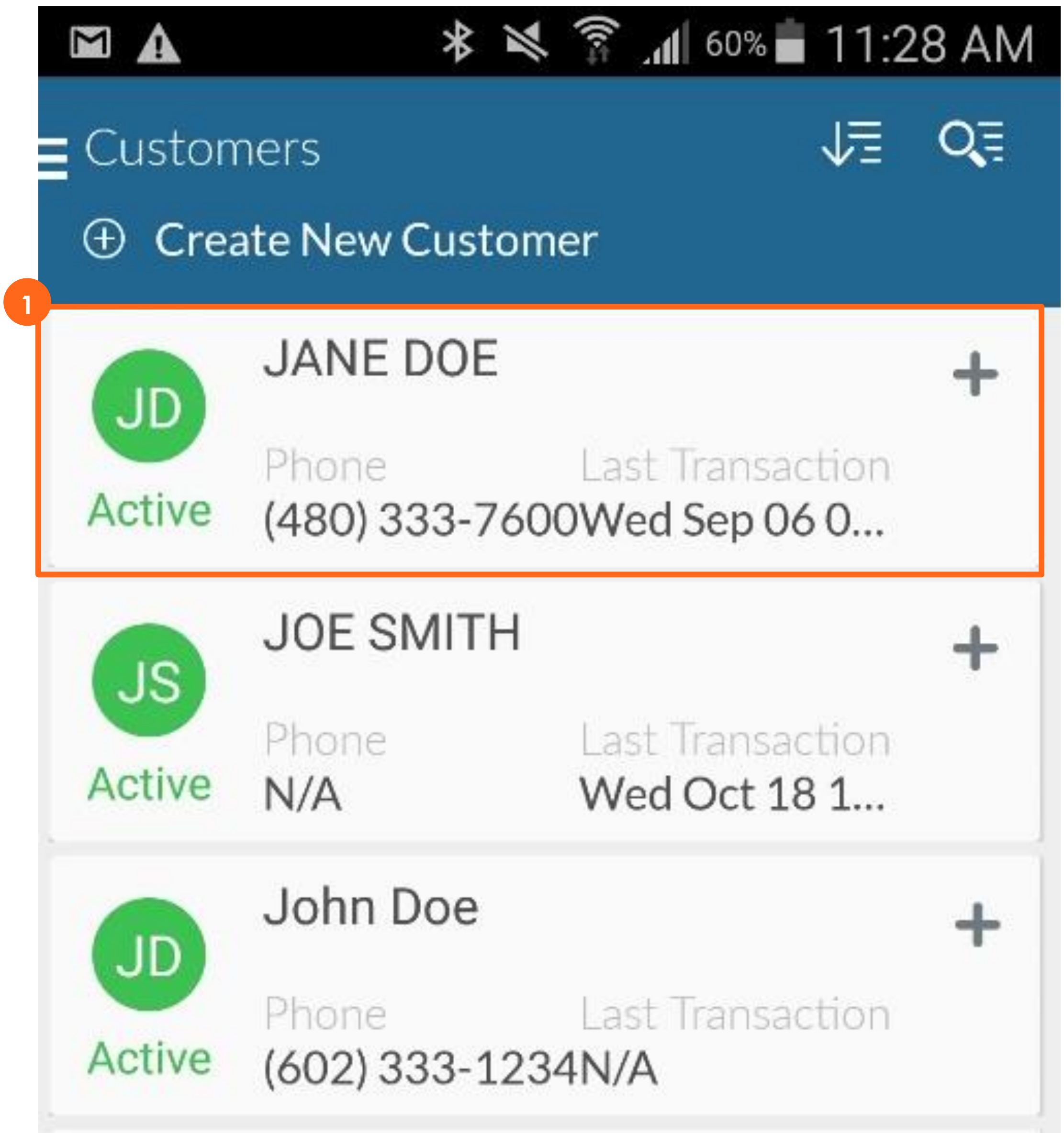
2. Enter all available customer information, including name, address, and business information. The minimum required information for a new customer is a first and last name. If you provide an email address, it will be used for the email receipt feature.
3. Tap **Save.**



Duplicate a Customer

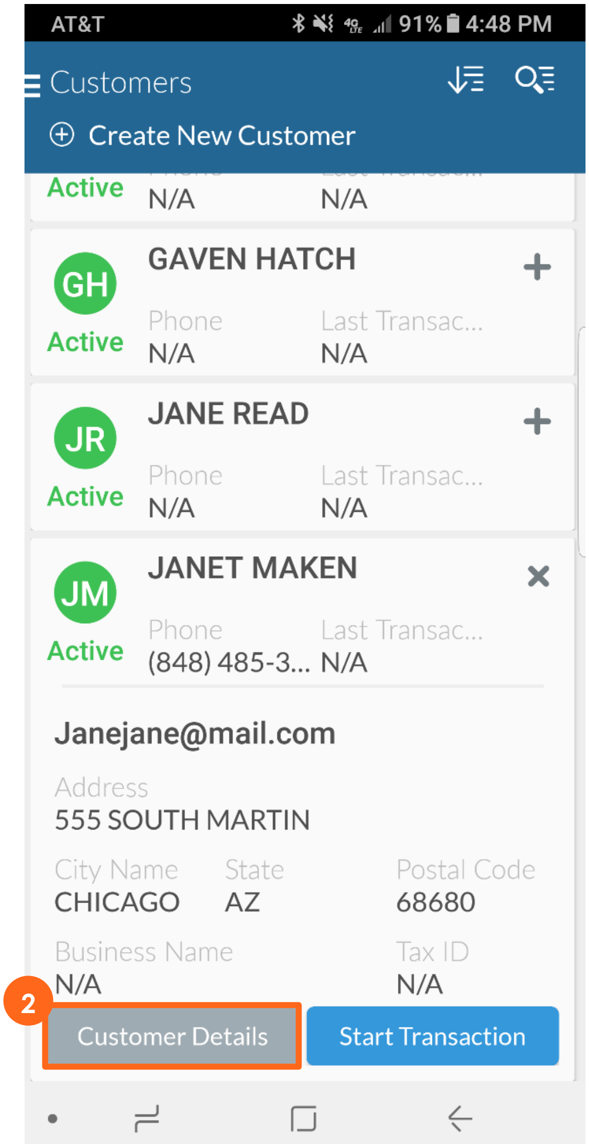
To add a new customer by duplicating an existing customer's profile:

1. Tap the customer's profile you wish to use as a template.

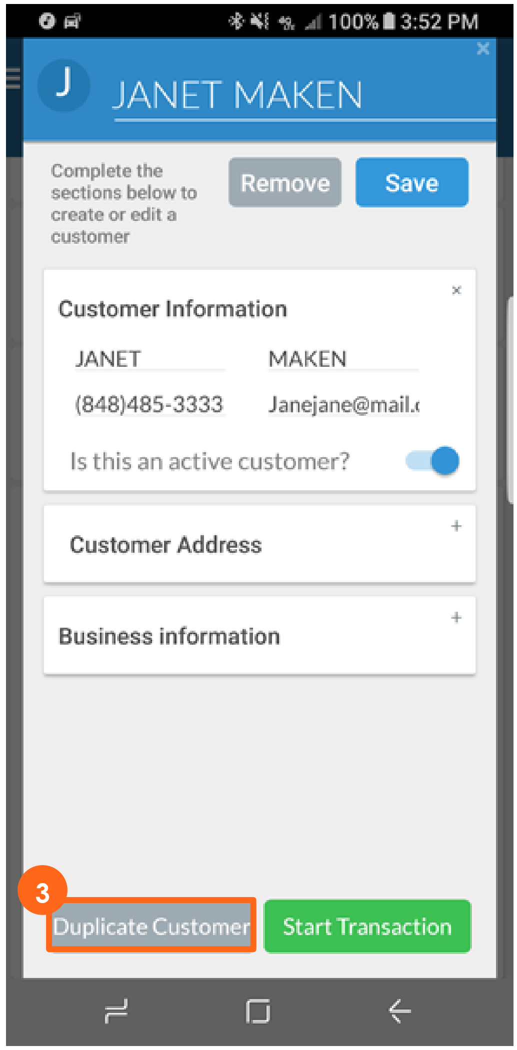


User Guide

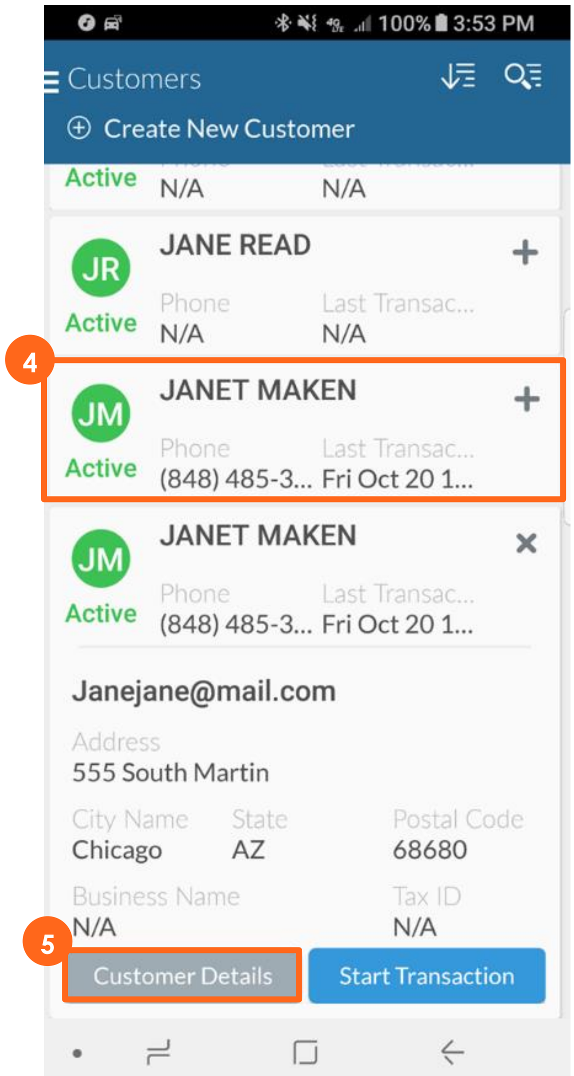
2. Tap **Customer Details**.



3. Tap **Duplicate Customer**. The duplicate customer will appear.

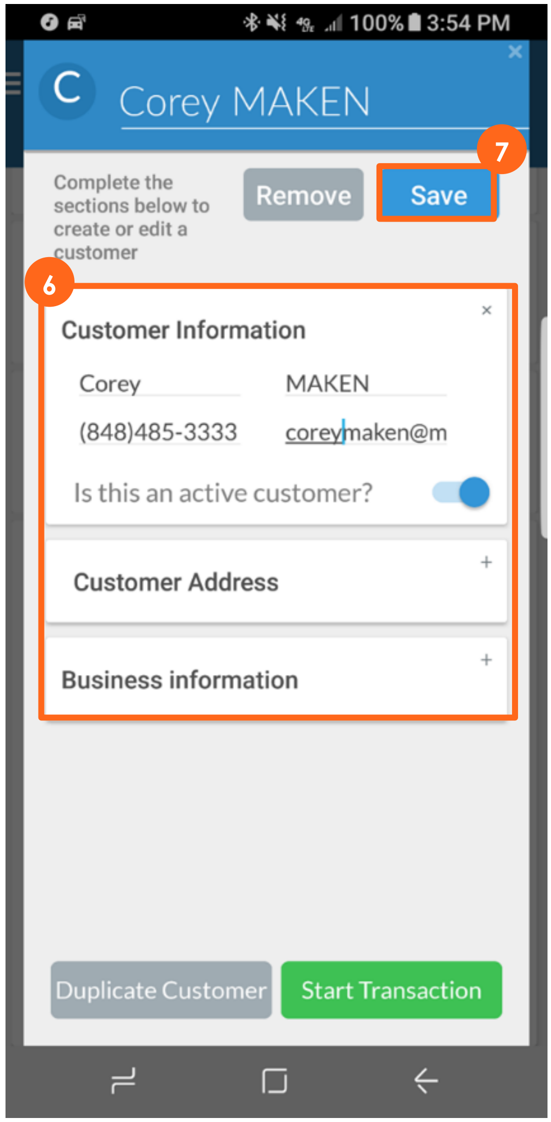


4. Tap the newly created **duplicate profile**.
5. Tap **Customer Details.**



User Guide

6. Edit the **customer information** as needed.
7. Tap **Save**.

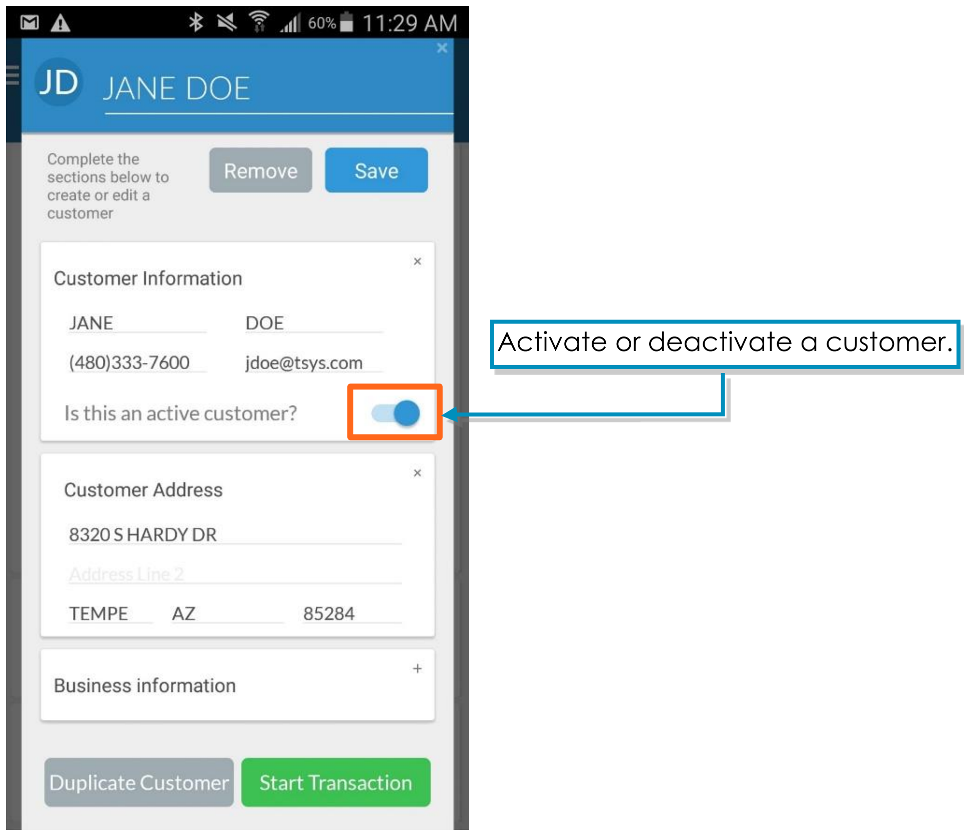


User Guide

Remove Customer Information

You can change a customer's visibility from the Customer Details screen so their information no longer shows on your active customer list. You can reactivate the customer's information at any time by turning on the visibility again.

Customer Information Page



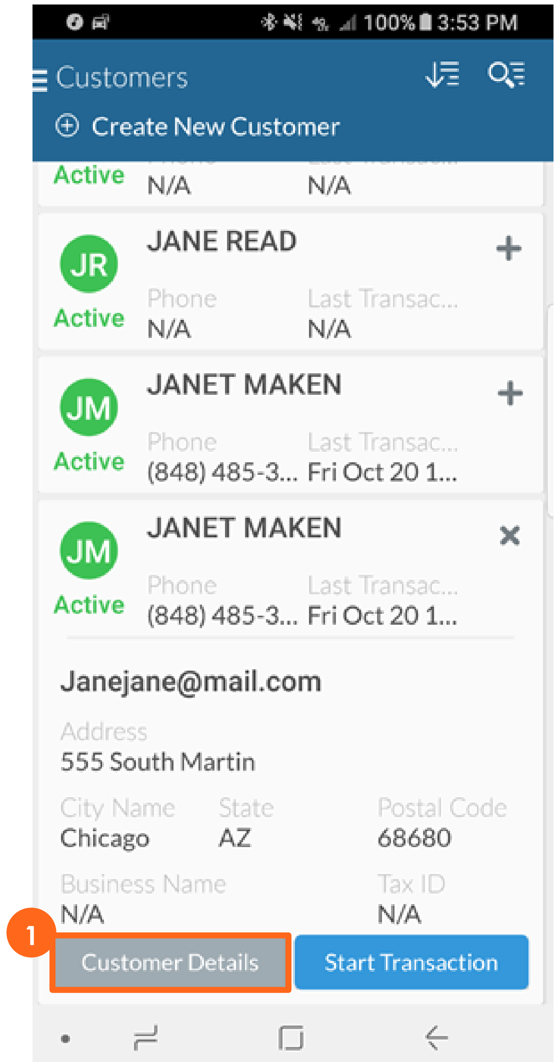
You can also permanently remove a customer from your customer list. Removed customers will not show up in reports.

User Guide

Remove a Customer

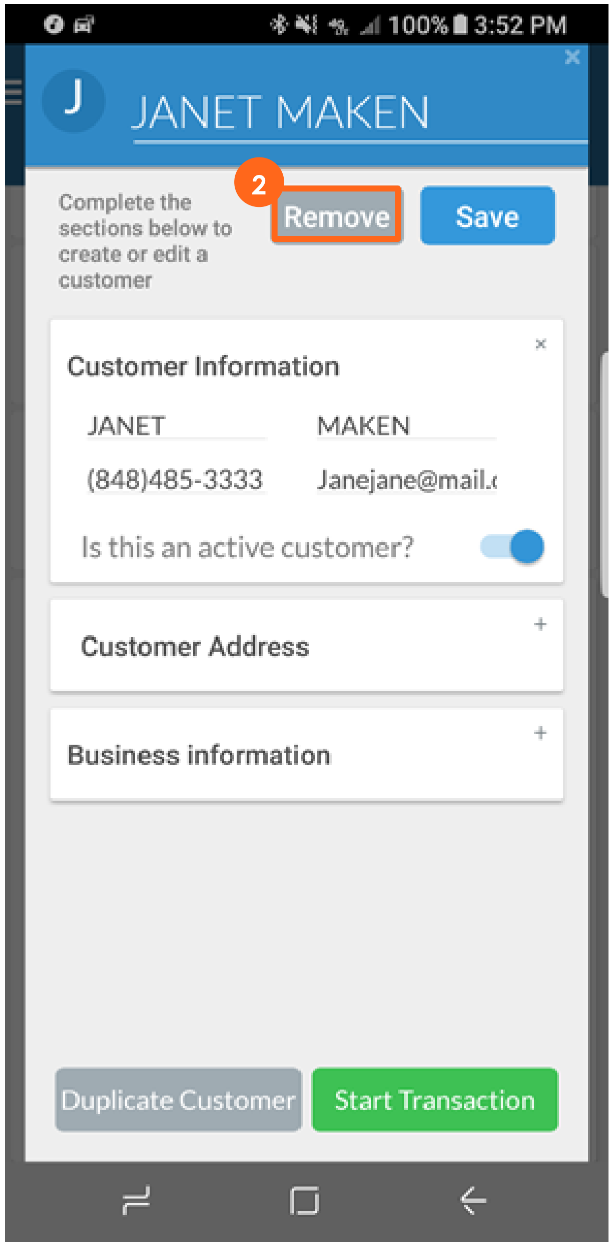
To remove a customer from your customer list:

1. Tap **Customer Details** for the customer you wish to remove.



User Guide

2. Tap **Remove**. Follow the prompt and confirm or cancel your decision to complete the process.

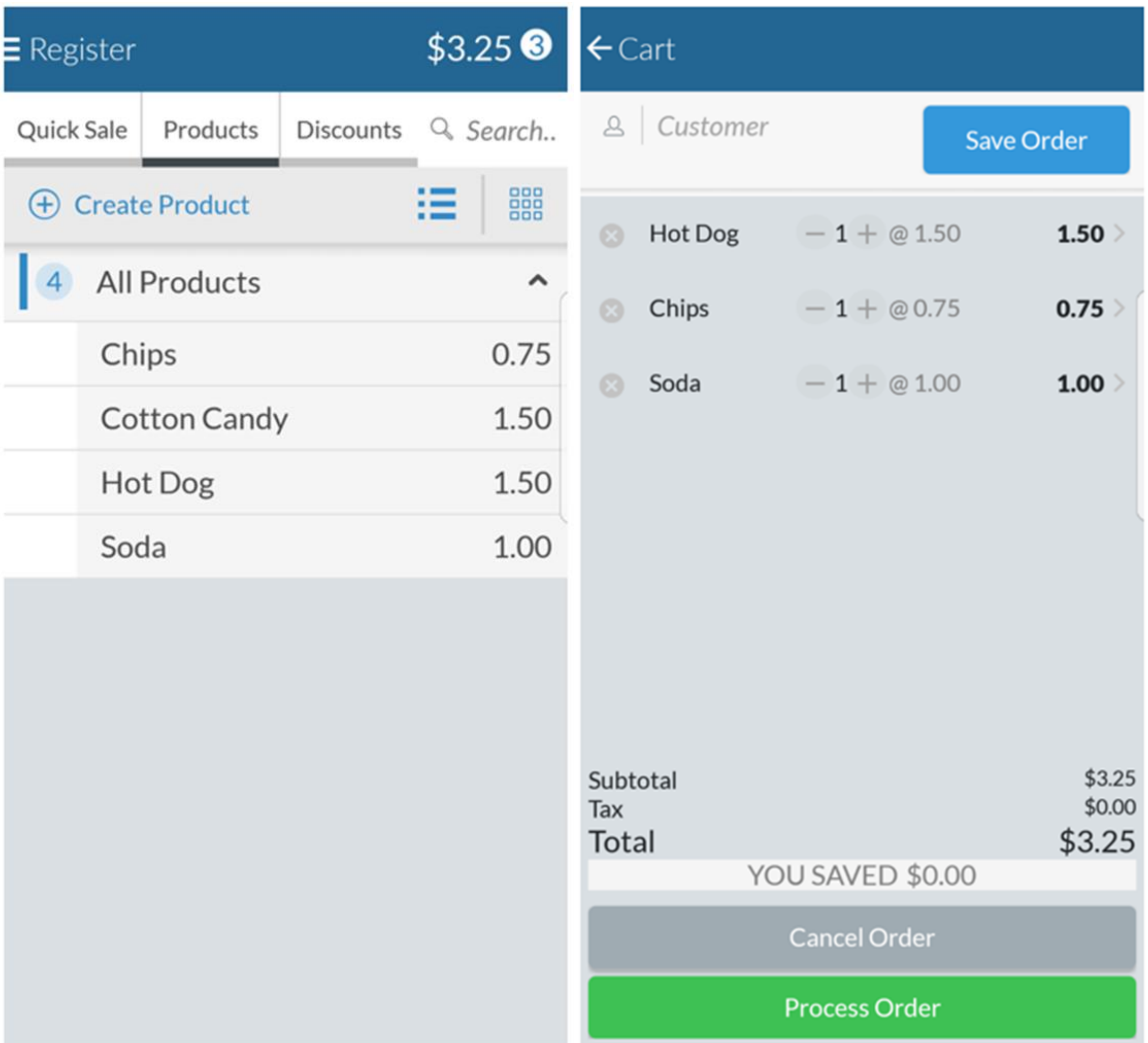


Transactions

Mobile Payment Acceptance makes it easy to perform a transaction. The Register, which is used to start a transaction, is the default home screen, so you can start a transaction as soon as you are logged in.

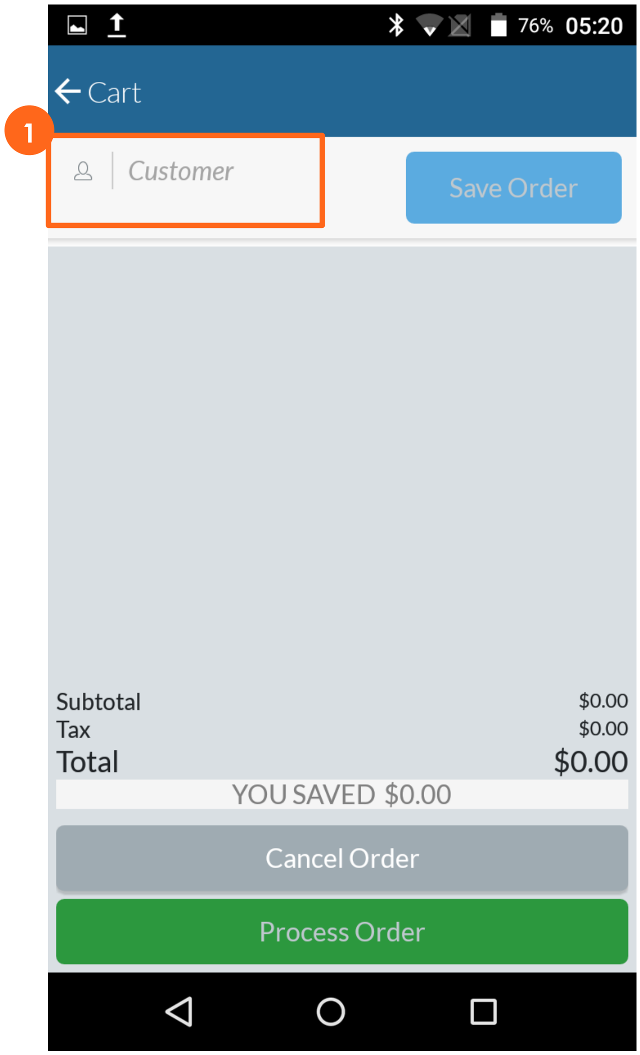
Due to screen display optimization, the Register and Cart screens are displayed on separate screens.

Register Page

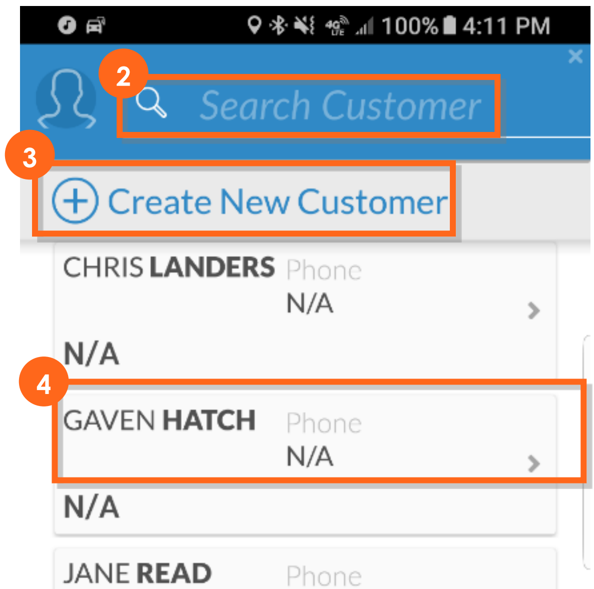


Add a Customer to a Transaction

1. If you would like to add a customer your transaction, tap *Customer* section of the cart page.



2. Tap **Search Customer** to find the customer in your customer database.
3. If the customer is not in your customer database, tap **Create New Customer** to create a new customer record.
4. If the customer record you need appears at the top of the list, simply tap that record to add it to your transaction.



Begin a Transaction

To begin a transaction, you can add products to an order in several different ways:

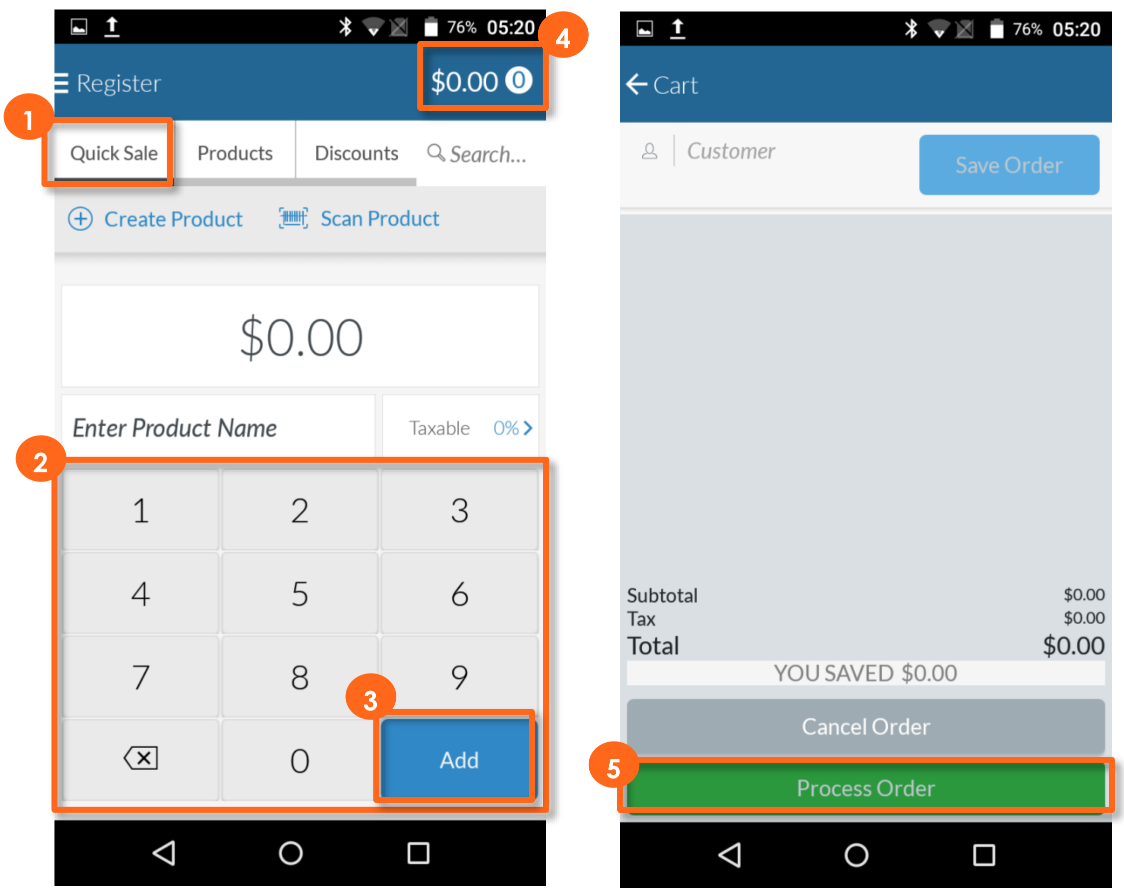
- Manually enter the price and a temporary product name using the **Quick Sale** button.
- Add a product from your product list using the **Products** button or, if your device allows, the **Scan Product** button.
- Add a new product not currently in your product list, along with the necessary tax and product information, using the **Create Product** button.

You also have the option of entering customer information for an existing or new customer, or adding an invoice number if your business uses them.

Begin a Transaction Using a Quick Sale

To begin a transaction using a Quick Sale:

1. Tap Quick Sale.
2. Enter a dollar amount on the number pad.
3. Tap **Add** to add the amount to the order.
4. Tap the Cart Subtotal in the top right to display the Cart screen.
5. Tap Process Order.



Note: You can add or remove items to an order, as well as temporary product names. If you leave the Enter Product Name field blank, it will display as MISC. Products entered this way are not stored in your product inventory.

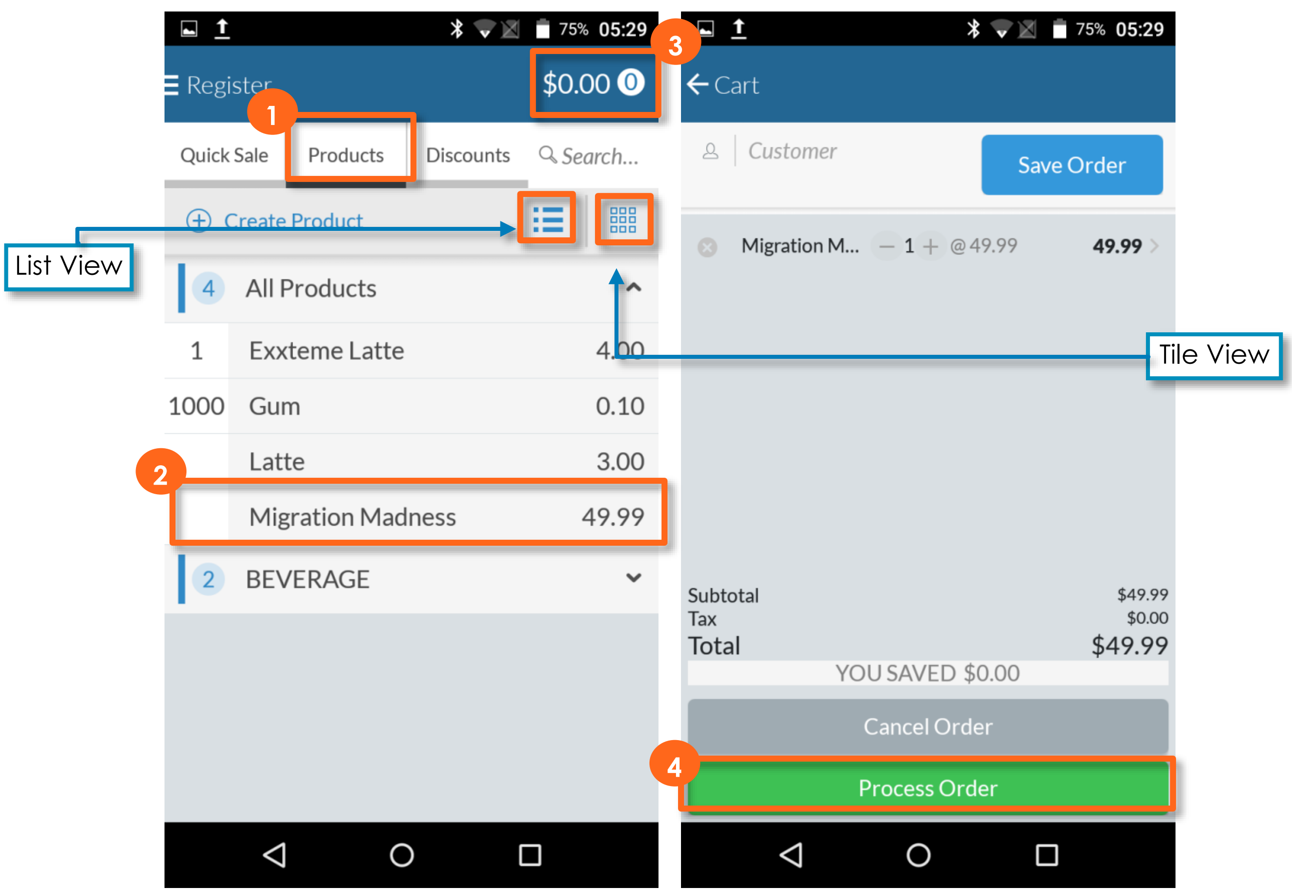
Begin a Transaction by Adding a Product

Depending on your business, you may sell different types of products. Some products will only come in one configuration, while others will have variations (e.g., size, color, etc.) or modifiers (i.e., extras, add-ons, etc.). MPA enables you to sell both simple and customizable products; however, products with variations and modifiers can only be added and modified from Merchant Center. See **Module 2: Merchant Center for Merchants** for more information on variations and modifiers.

Adding a Simple Product to a Transaction

To begin a transaction by adding a product without modifiers or variations from your product list:

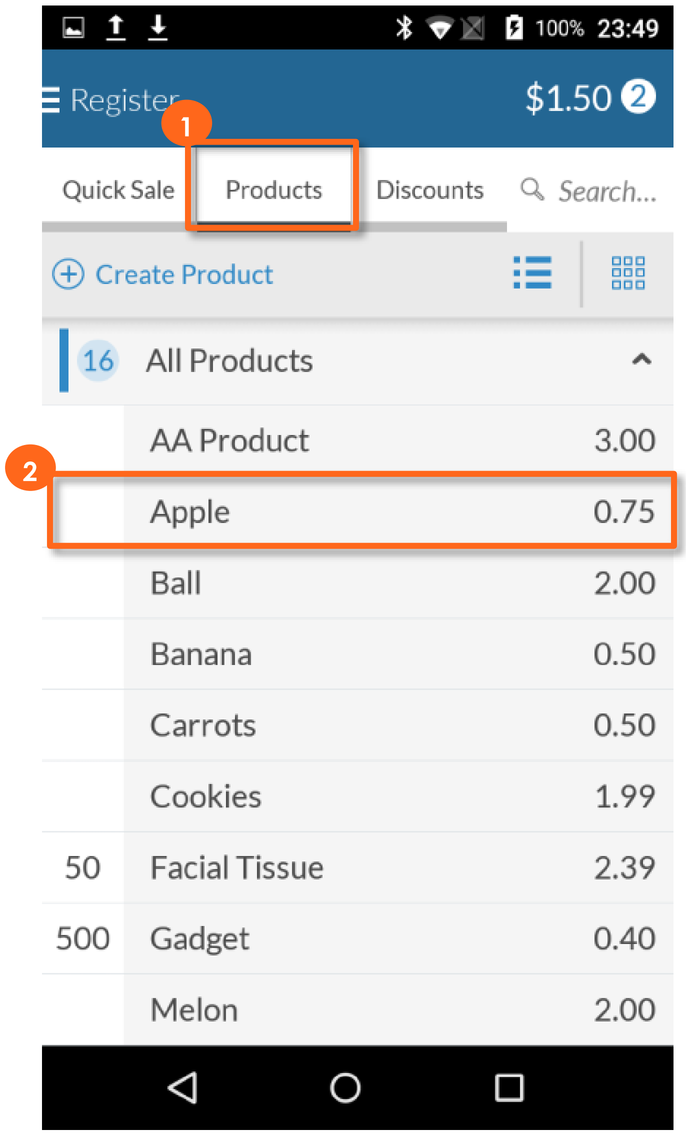
1. Tap Products.
2. Select the desired product from your product list to add it to your order.
3. Tap the Cart Subtotal in the top right to display the Cart screen.
4. Tap Process Order.



Adding a Customizable Product to a Transaction

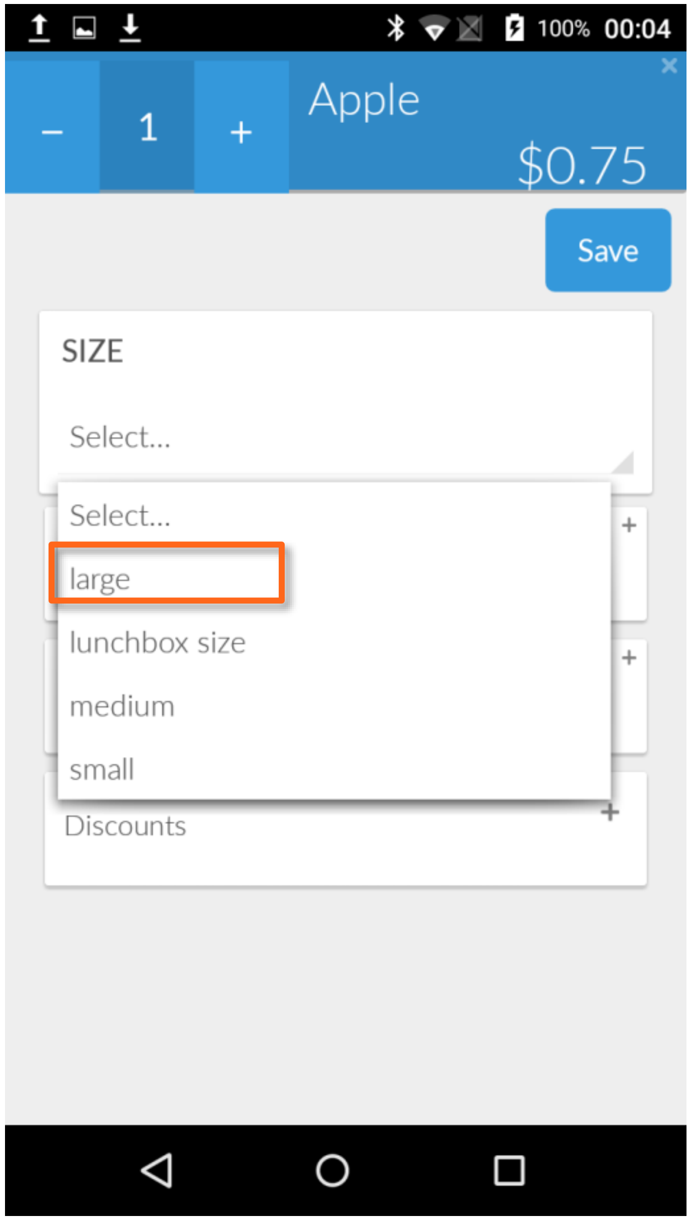
To begin a transaction by adding a product with modifiers or variations from your product list:

1. Tap Products.
2. Select the desired product from your product list.



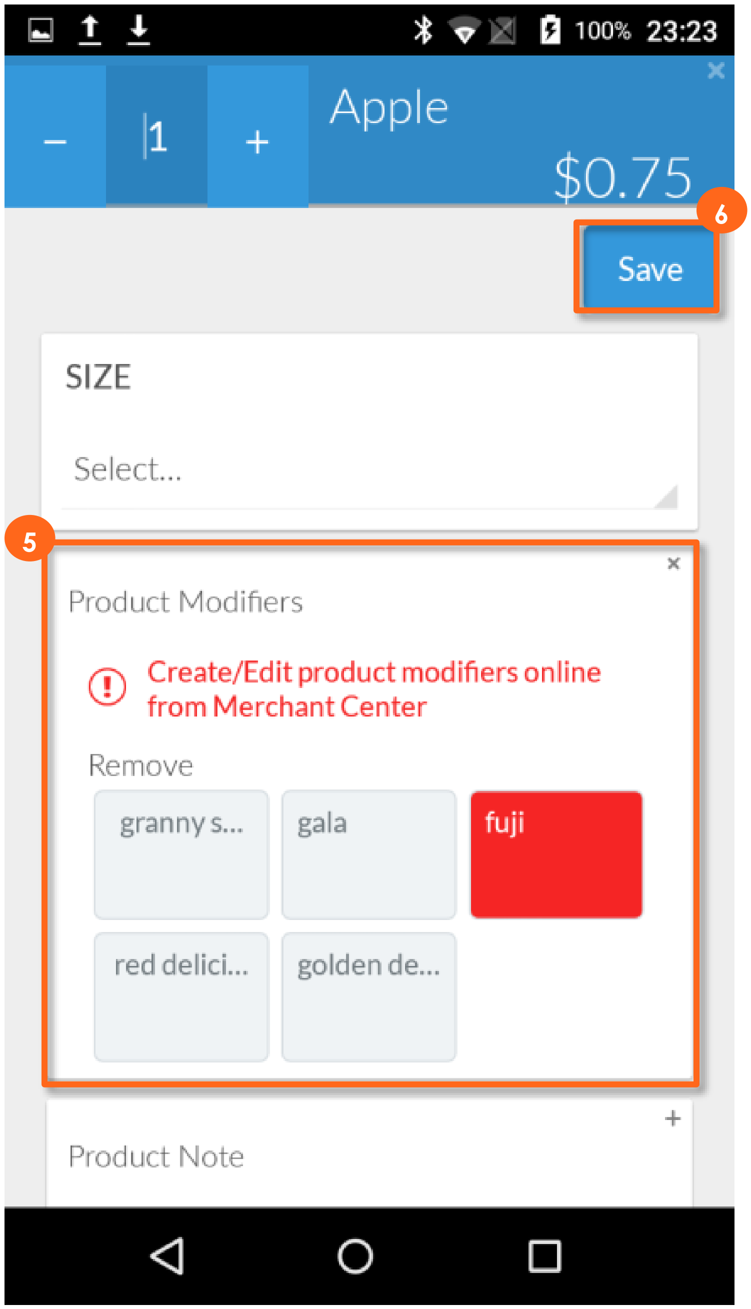
3. The Product Options window will open automatically for any Product with a Modifier or Variation.

4. Select the desired Product Variations from the dropdown that displays.

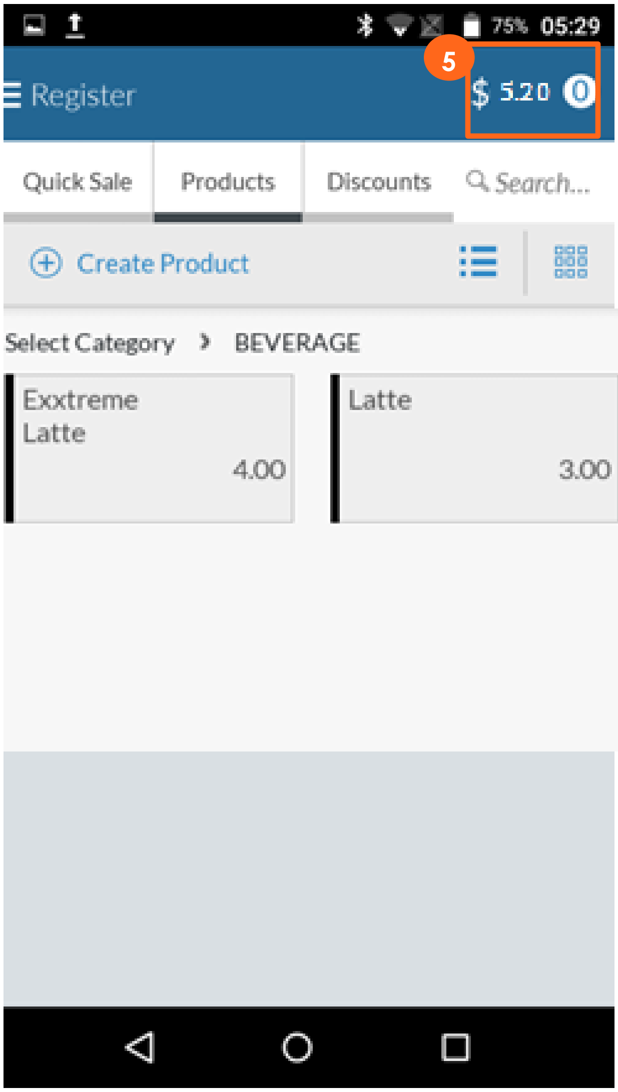


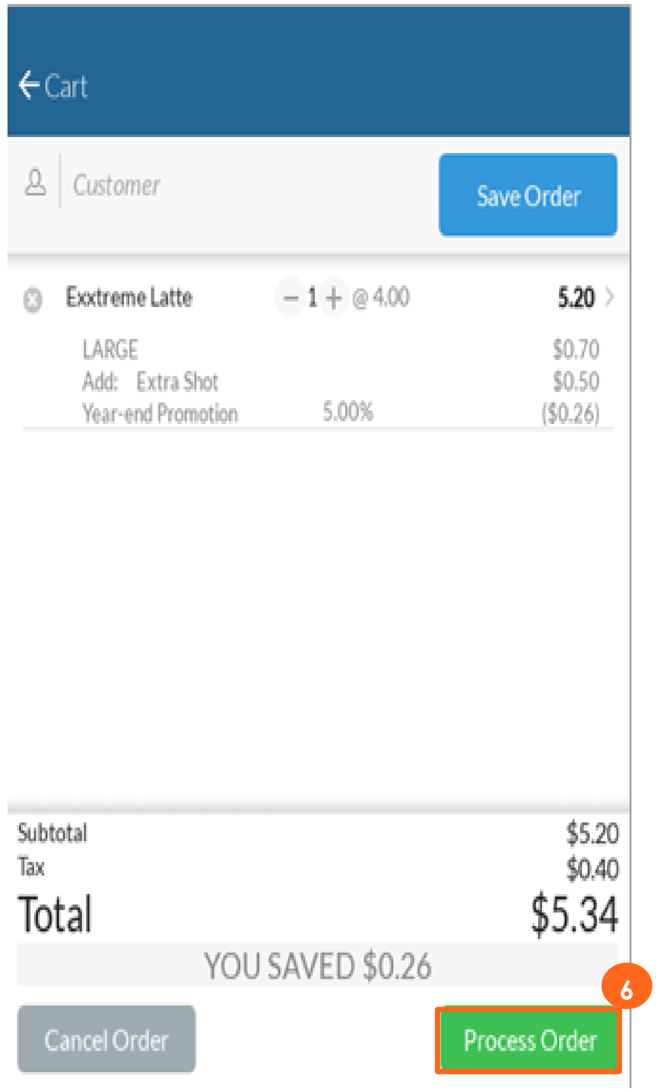
Note: If a product has variations, you MUST select a variation to continue.

5. Select any desired Product Modifiers by tapping them to select or unselect them. Modifiers show as red when they are currently selected.
6. Tap **Save**.



7. Tap the Cart Subtotal in the top right to display the Cart screen.
8. Tap Process Order.





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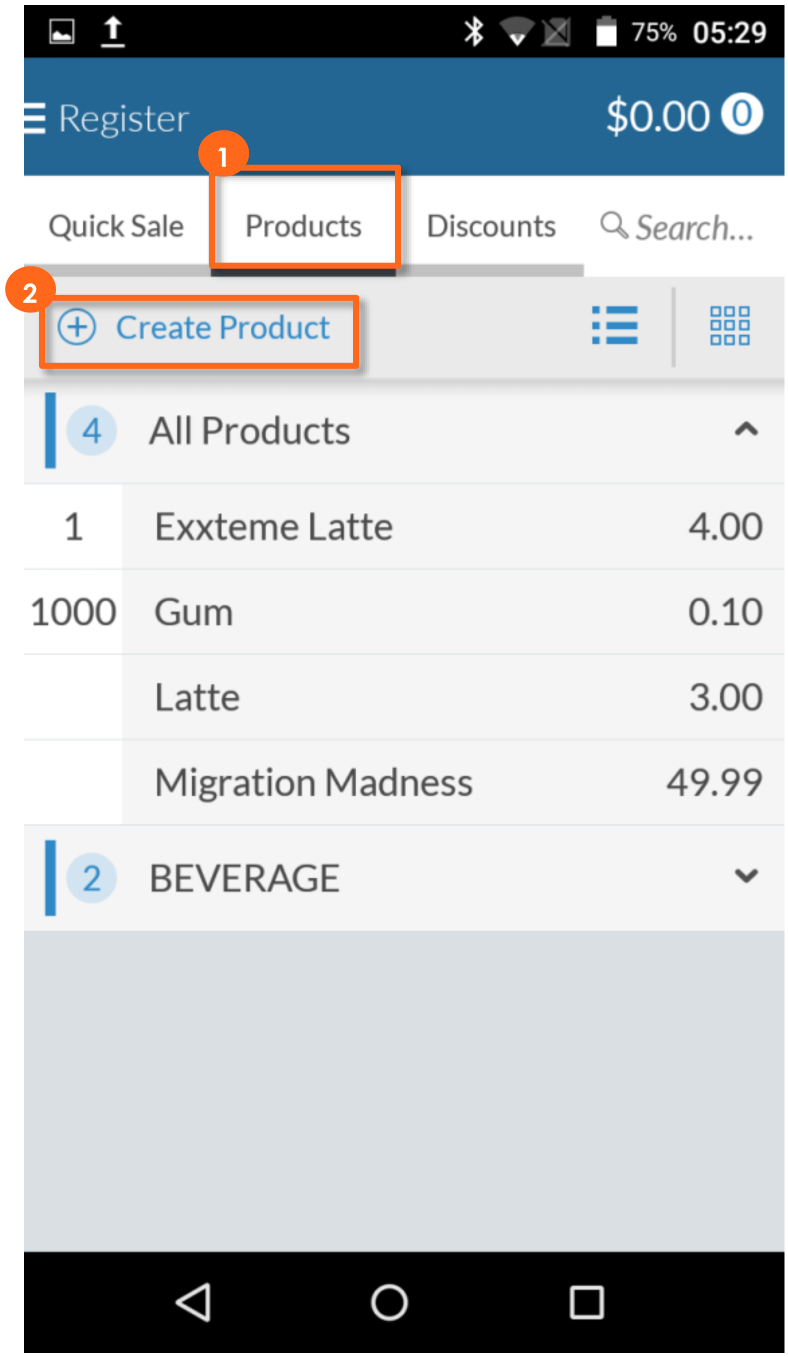
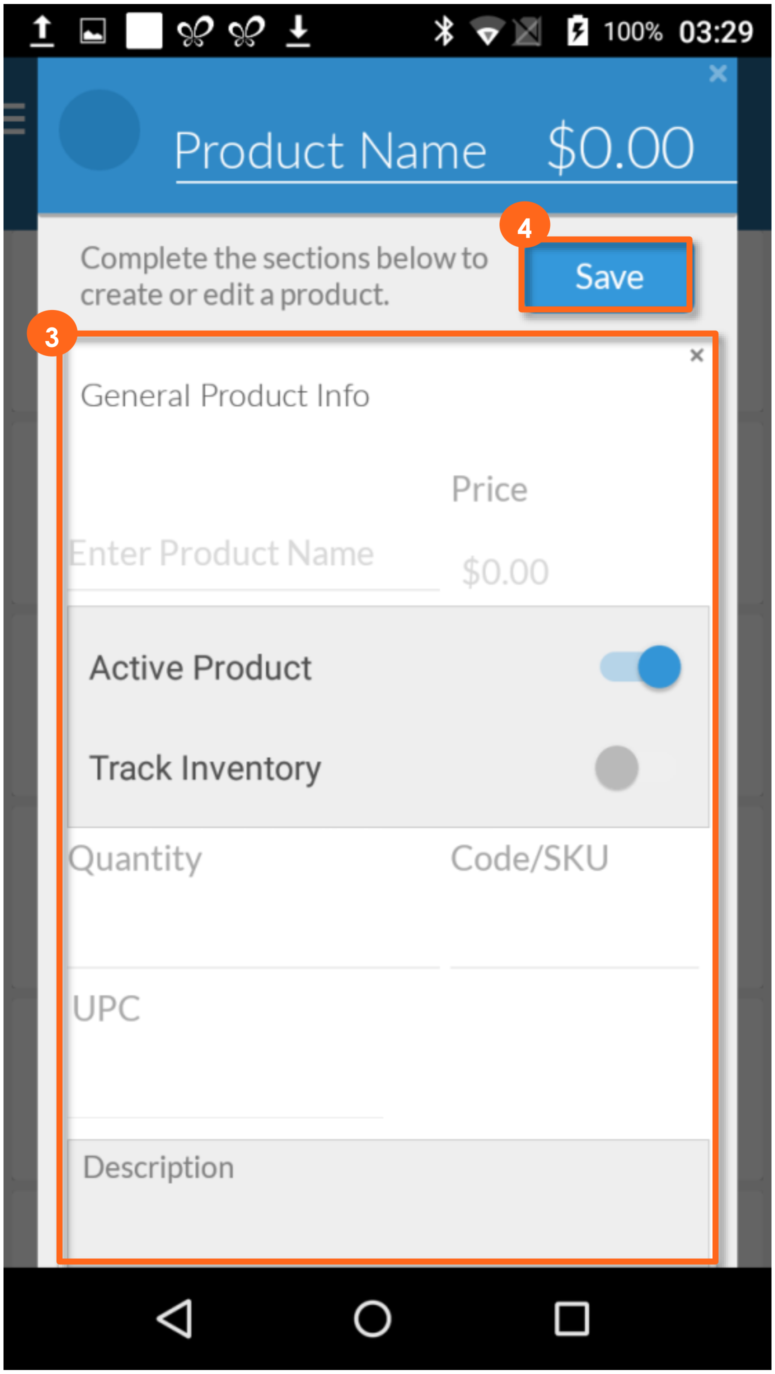
Begin a Transaction by Creating a Product

To begin a transaction by creating a product:

1. Tap Products.
2. Tap the **Create Product** button.

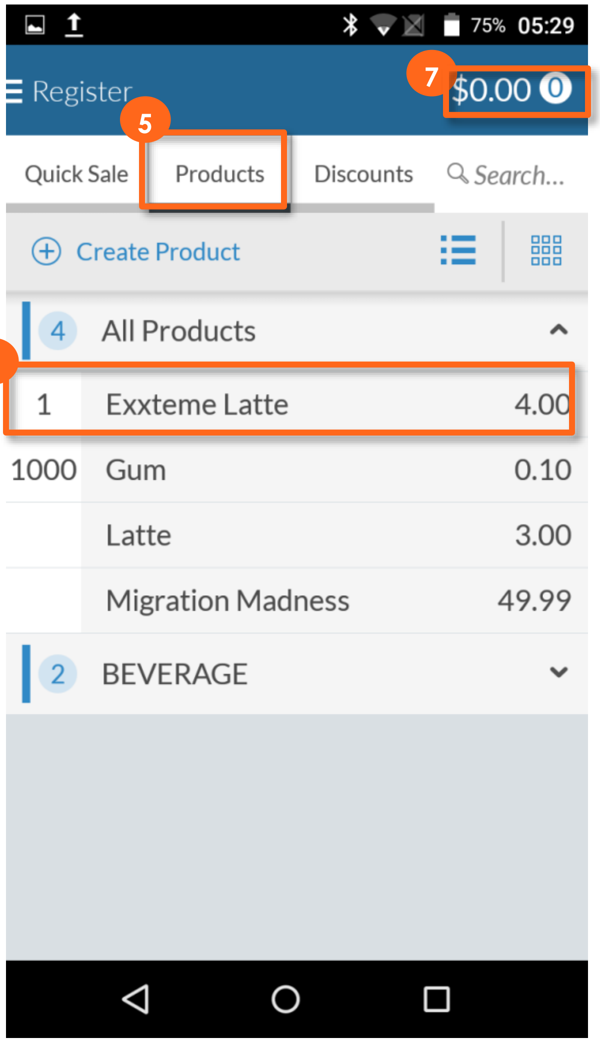


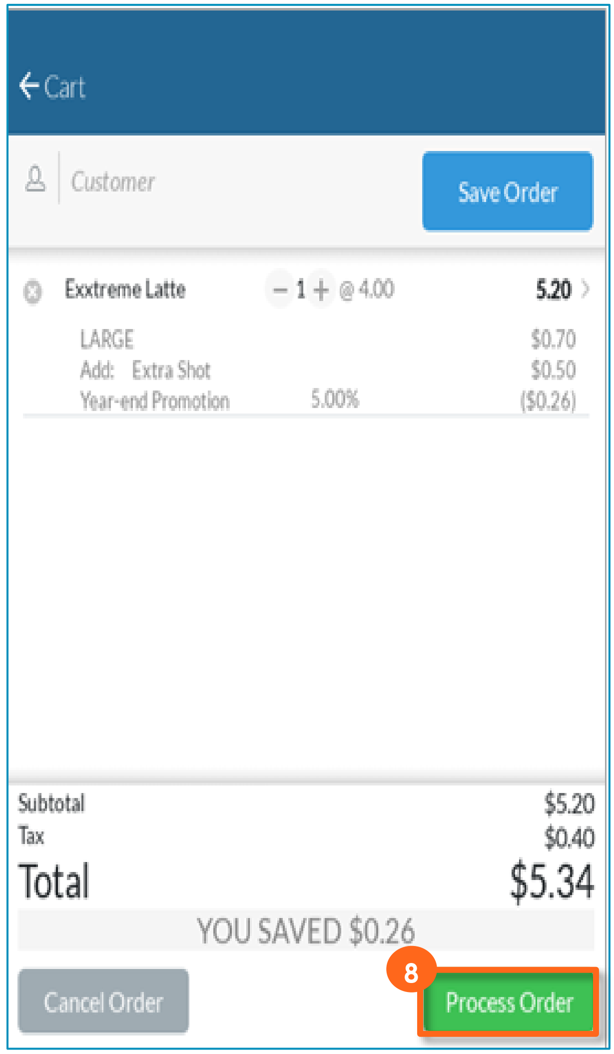
3. Enter the appropriate product information, and assign available taxes, discounts, and categories.
4. Tap **Save** to save the new product to your product list and return to the Register.



User Guide

5. Tap **Products**.
6. Select the newly created product from your product list to add it to your order.
7. Tap the Cart Subtotal in the top right to display the Cart screen.
8. Tap **Process Order**.



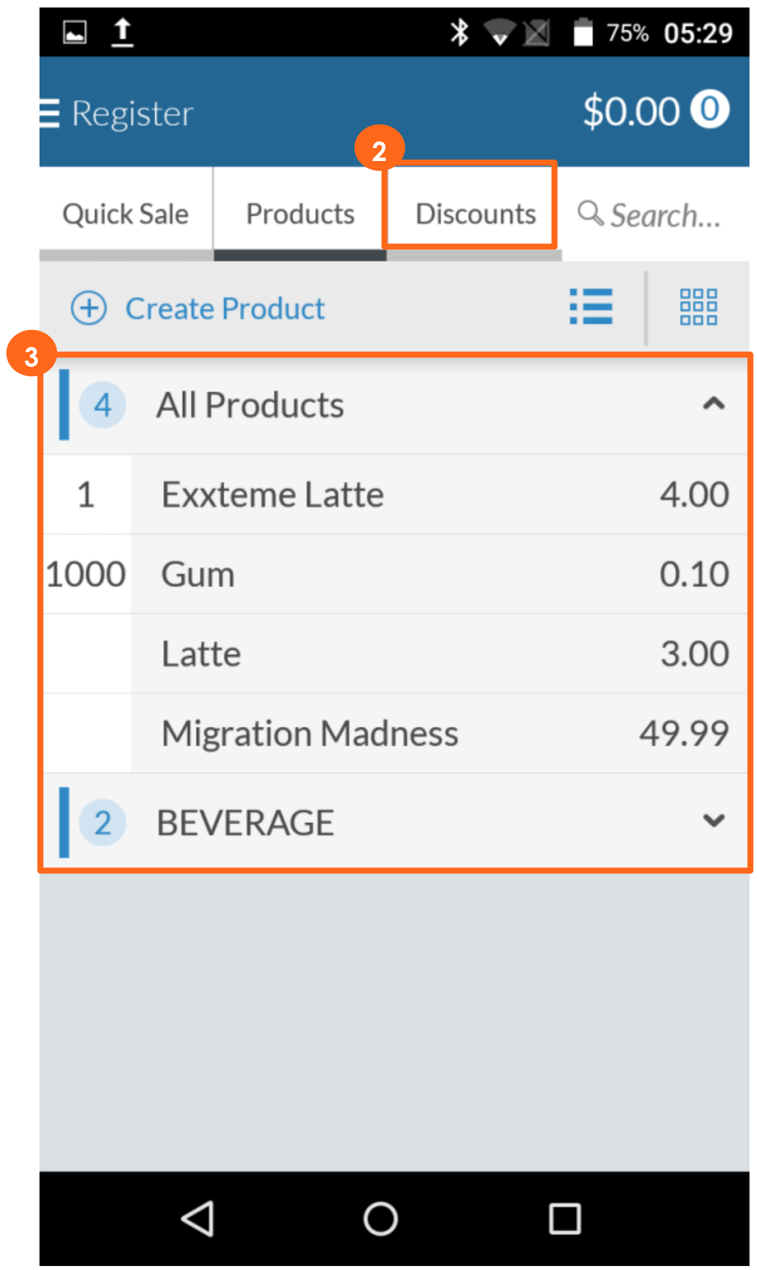


Discounts

Add a Discount to an Entire Order

To add one or more discounts to an entire order during a transaction:

1. Add one or more products to your order.
2. Tap **Discounts**.



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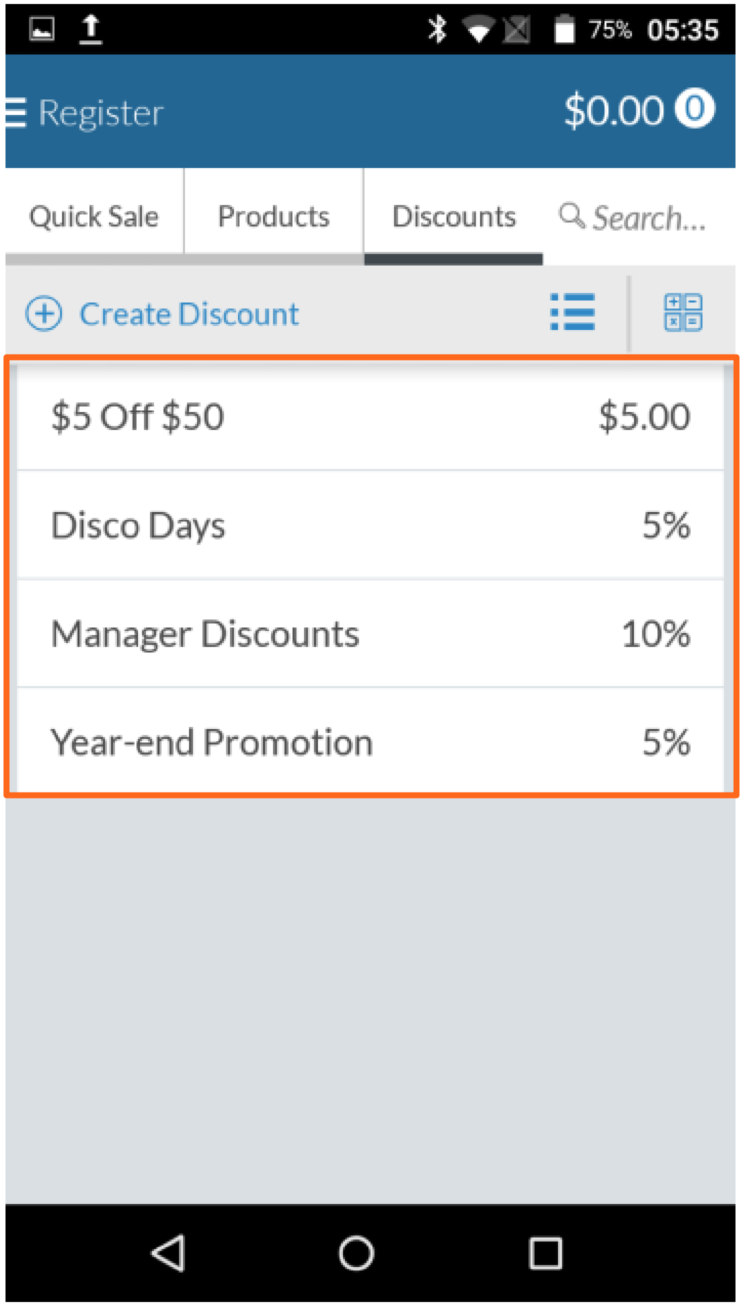
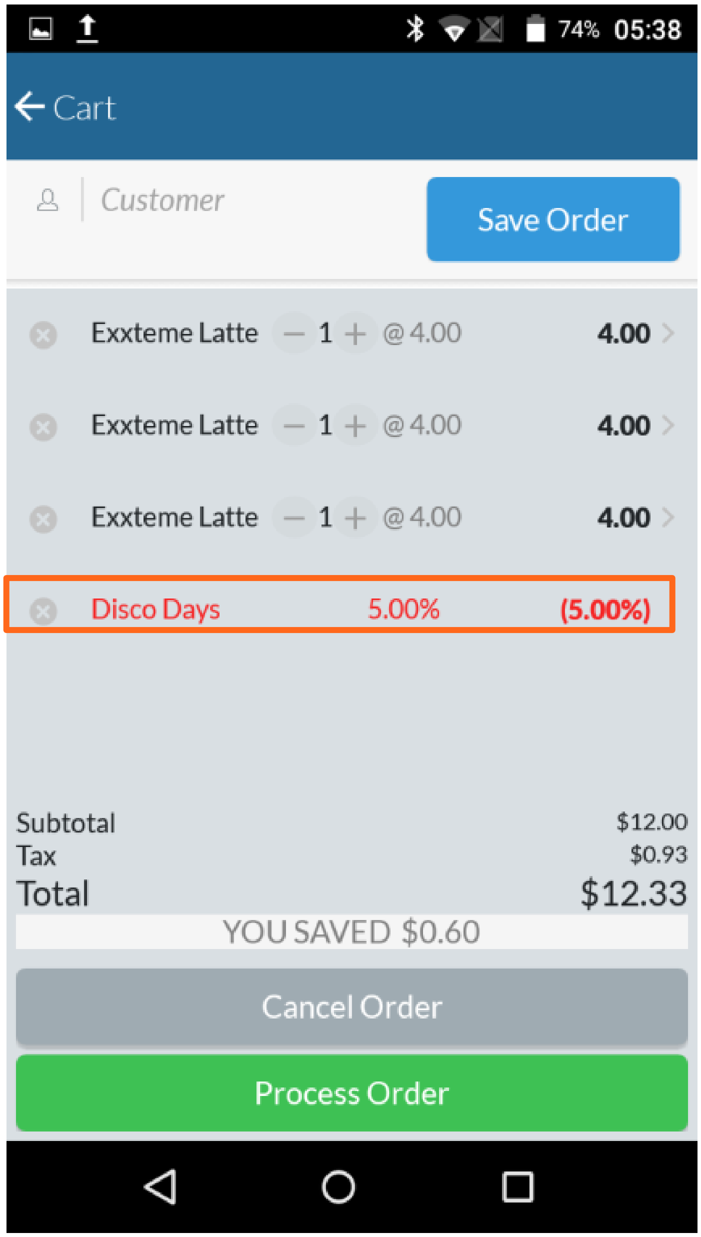
3. Tap the discount you wish to apply.



4. Review the applied discount and add additional discounts by repeating this process. Once you are satisfied with your selections, proceed as you would with a regular transaction.

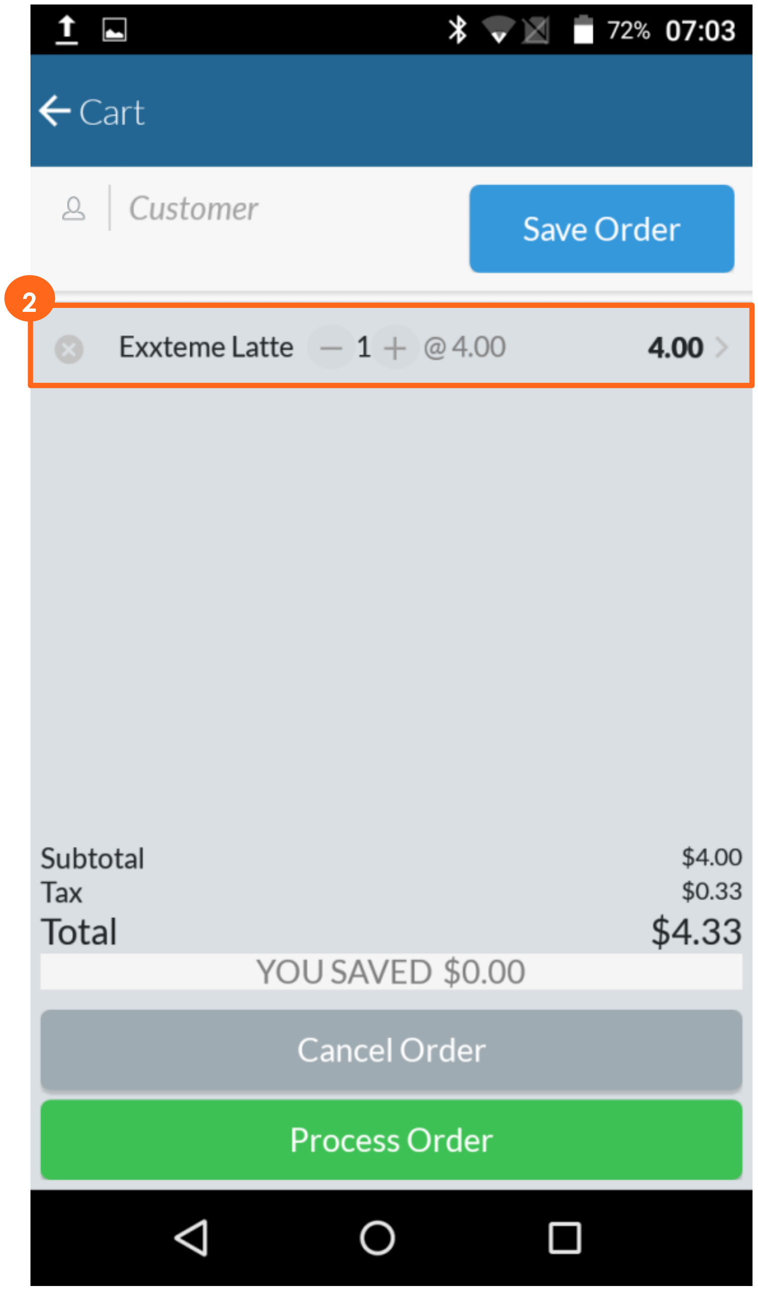


> **Note**: Individual discounts may only be applied once to an order or a product; however, the same discount may be applied twice if it is applied to an individual product and the entire order.

Add Multiple Discounts to a Single Product

To add multiple discounts to a single product during a transaction:

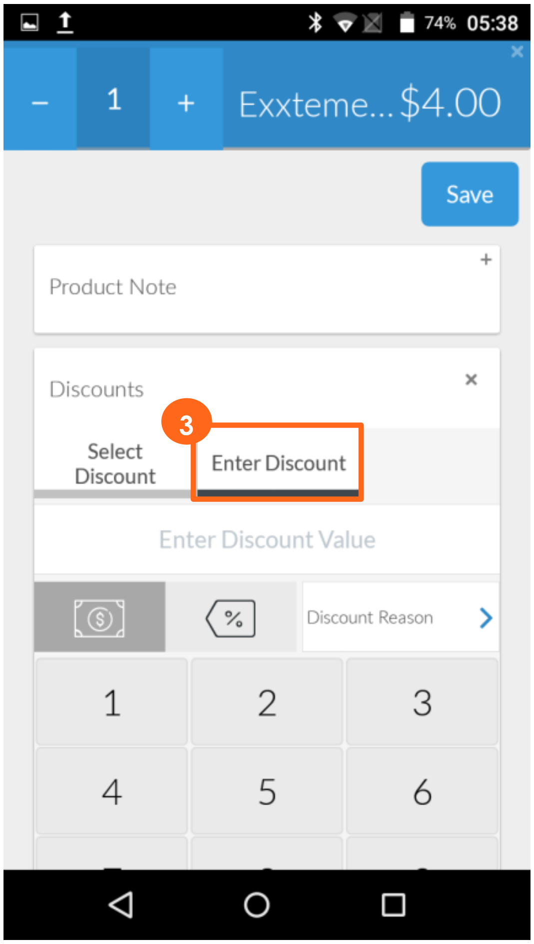
1. Add a product to your order.
2. Tap the product you wish to discount.

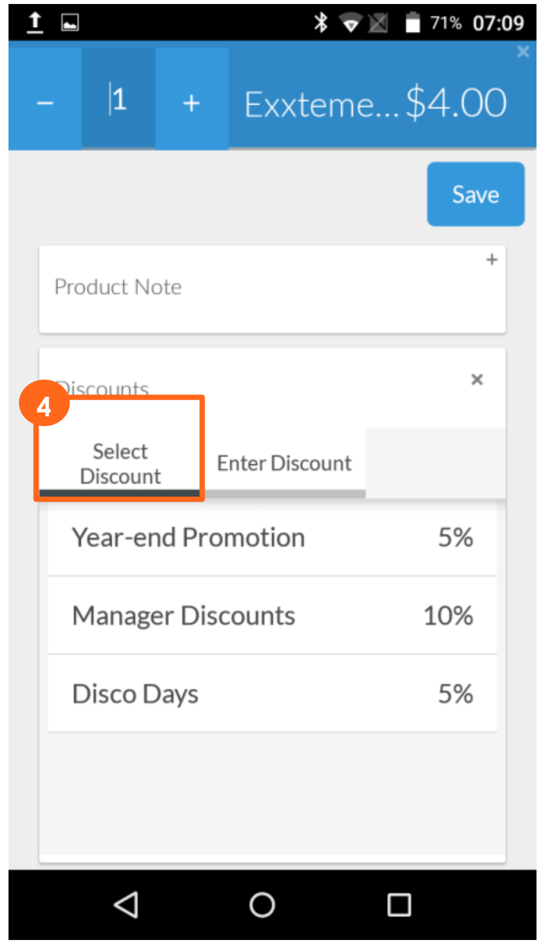


3. Tap **Enter Discount** to manually add a discount amount.

   OR

4. Tap **Select Discounts** and then tap a discount to apply a pre-defined discount.



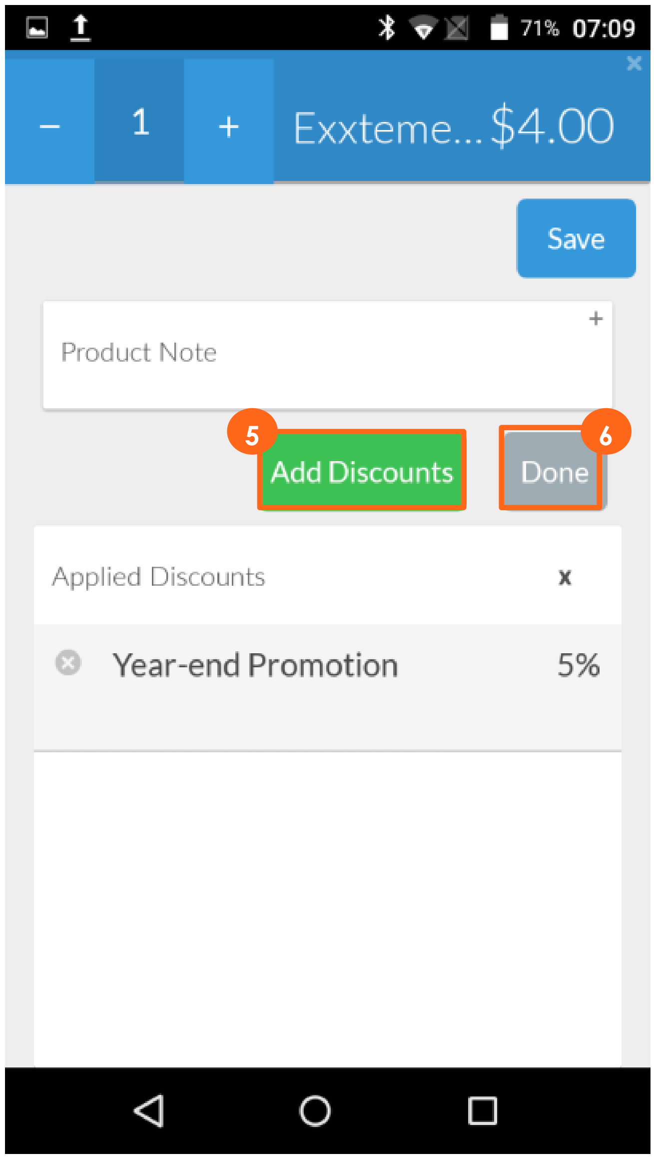


User Guide

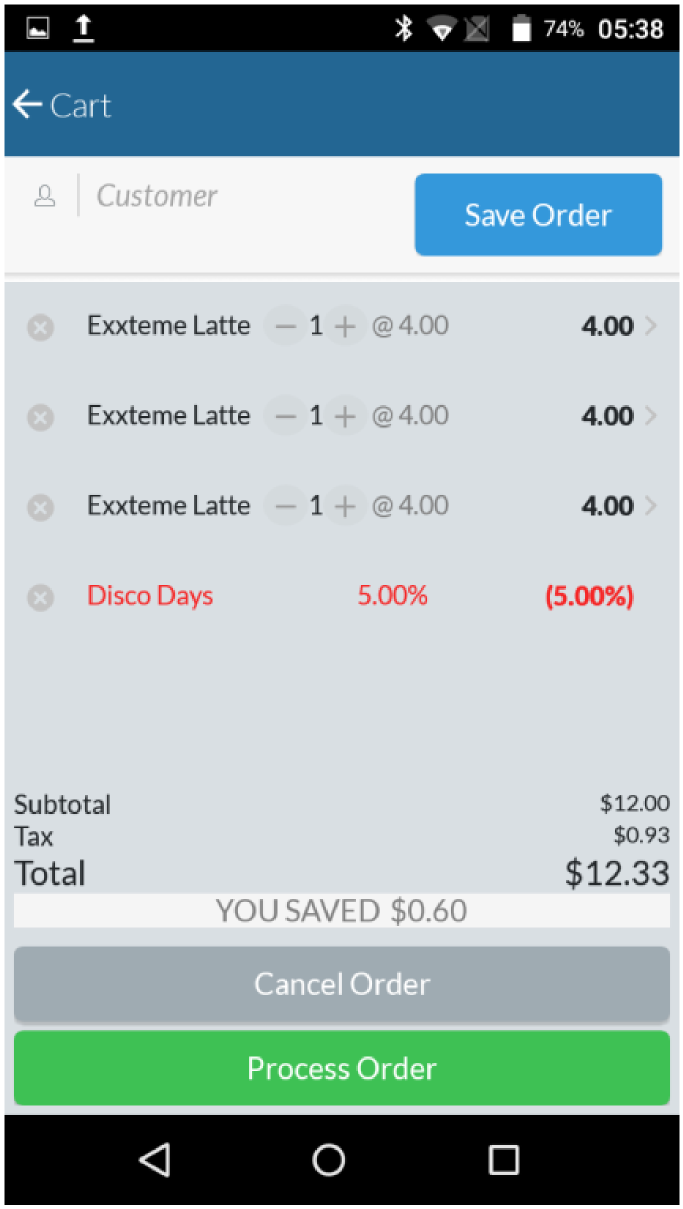
5. Tap **Add Discounts** if you wish to apply additional discounts.

   OR

6. Tap **Done** to return to the Register.

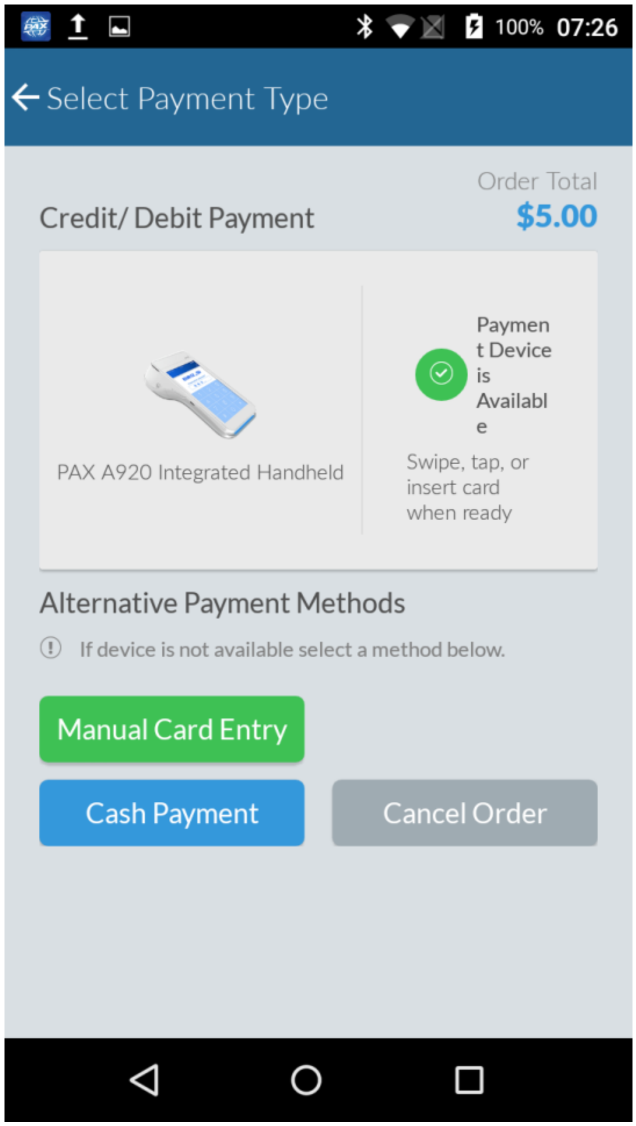


7. Review the applied discounts and add additional discounts by repeating this process. Once you are satisfied with your selections, proceed as you would with a regular transaction.



Processing a Payment

Before you can finish processing an order, you must process a payment. At this stage in the transaction, you can review the order total, select a payment method, or cancel the order.



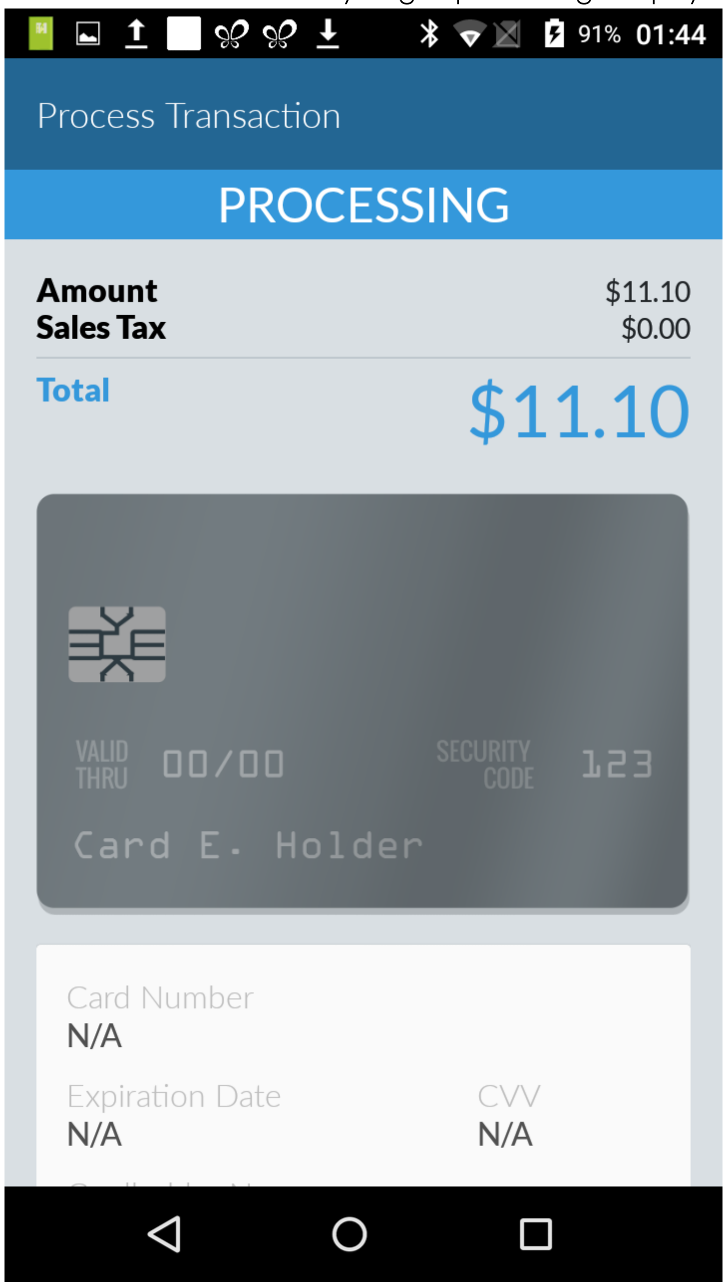
There are three ways you can process a payment:

- Integrated card reader.
- Manually enter card information
- Enter a cash transaction

User Guide

Card Reader

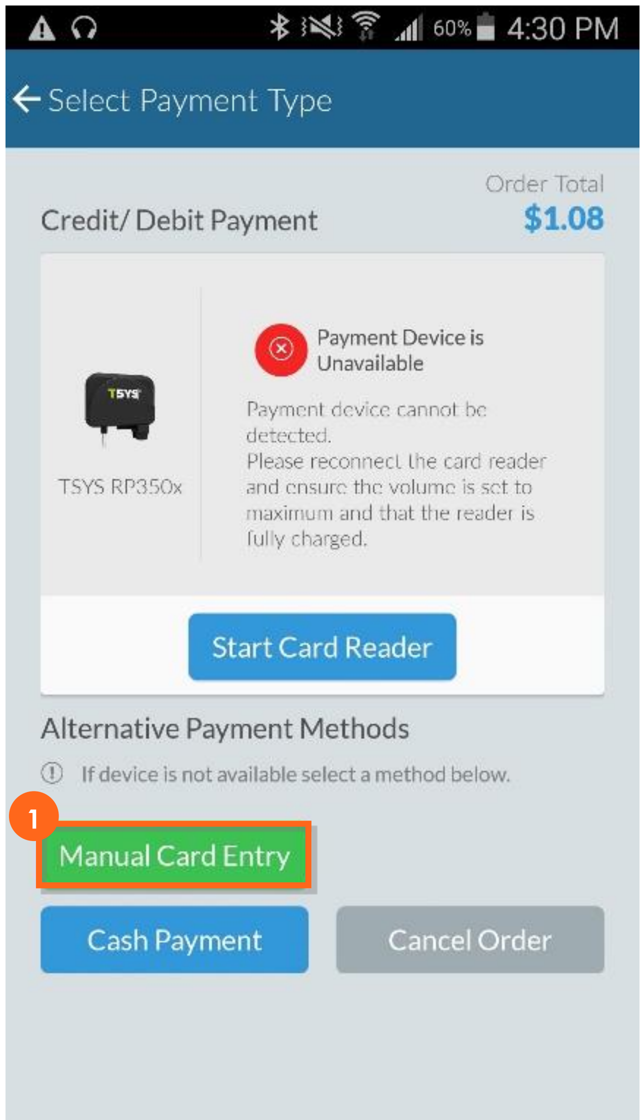
1. The customer can dip or tap their chip card, tap their NFC-enabled wireless device or swipe a non-EMV card. This automatically begins processing the payment.



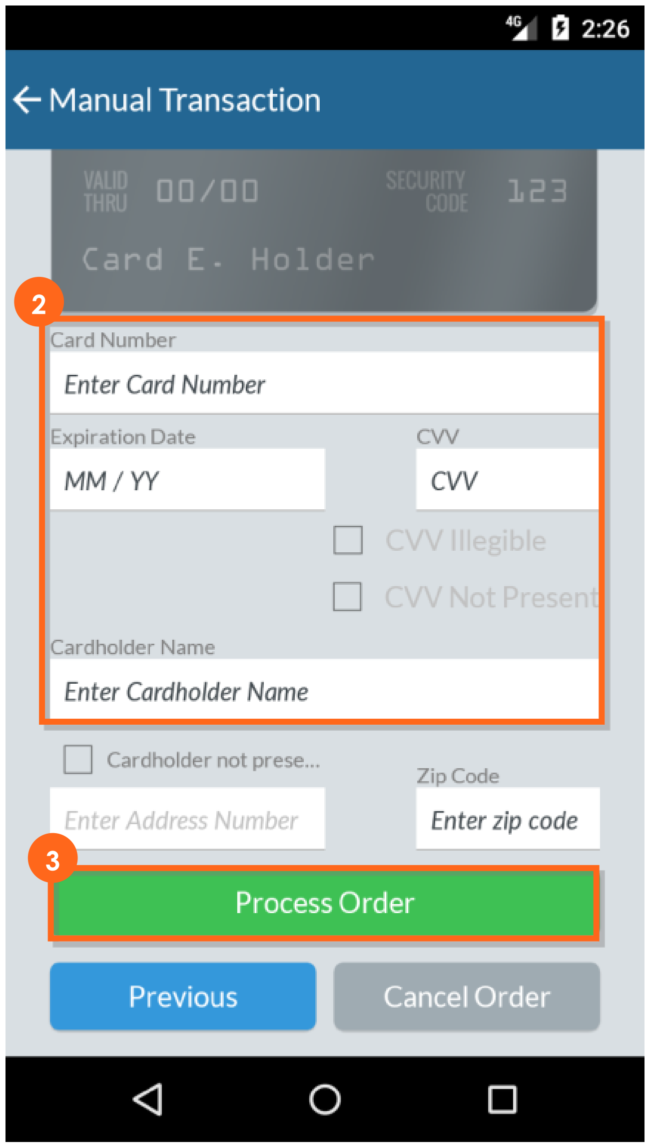
Manual Card Entry

To process an order using manual card entry:

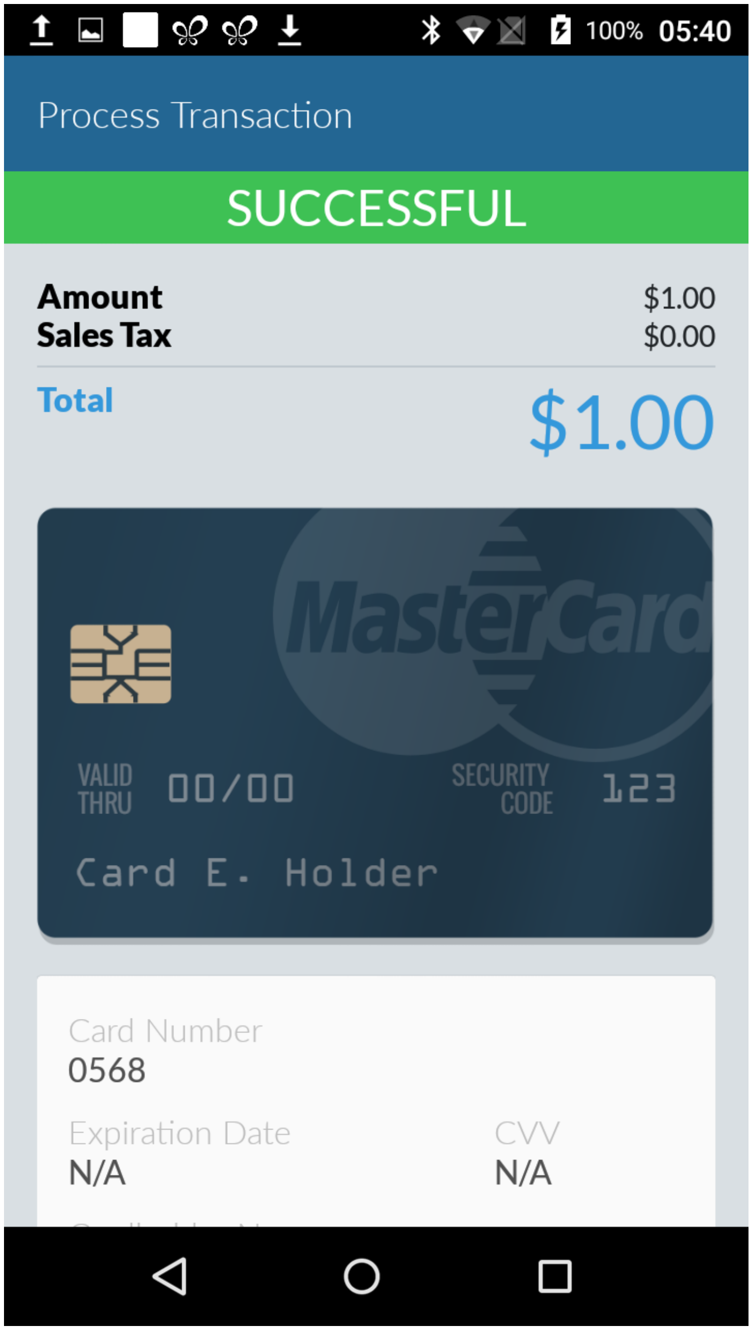
1. Tap **Manual Card Entry.**



2. Enter the **card information** in the available fields. If you enter incorrect information, you may not be able to proceed until you correct it.
3. Tap **Process Order**.



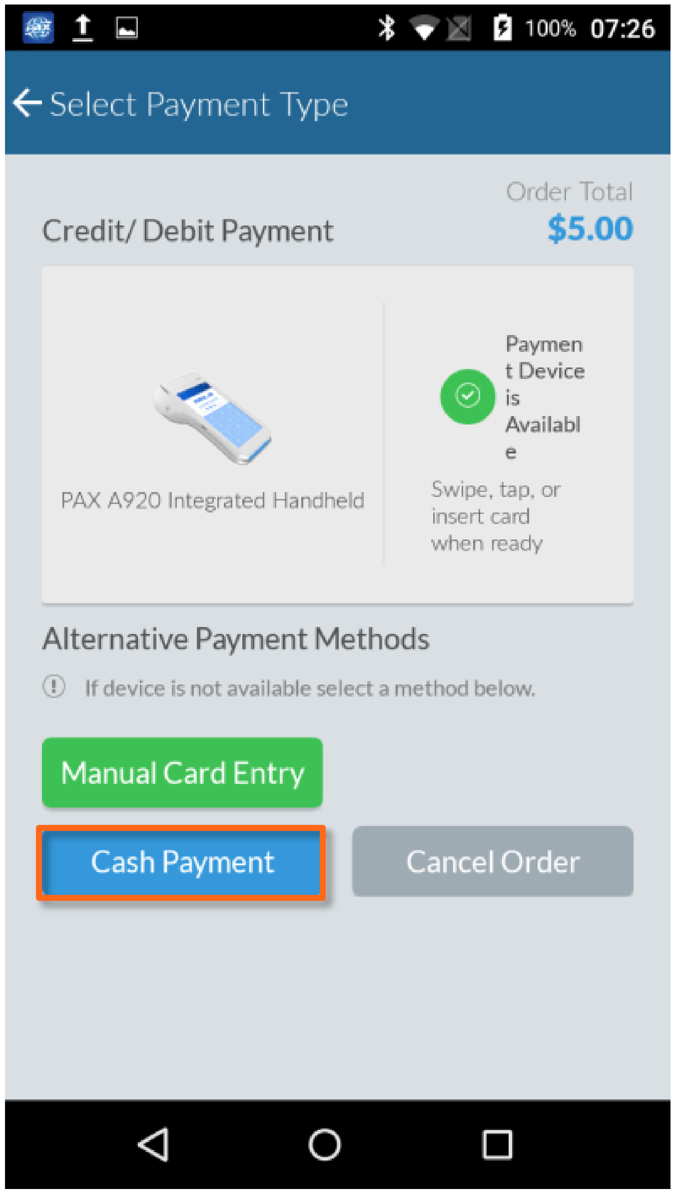
After you enter all requested information and tap Process Order, the screen will display SUCCESSFUL or DECLINED. If you see NO CONNECTION, you may not be connected to a network. If the transaction was successful, you will be prompted to hand the device to the customer to complete the transaction. If the transaction was declined, you can still choose another method of payment or cancel the order.



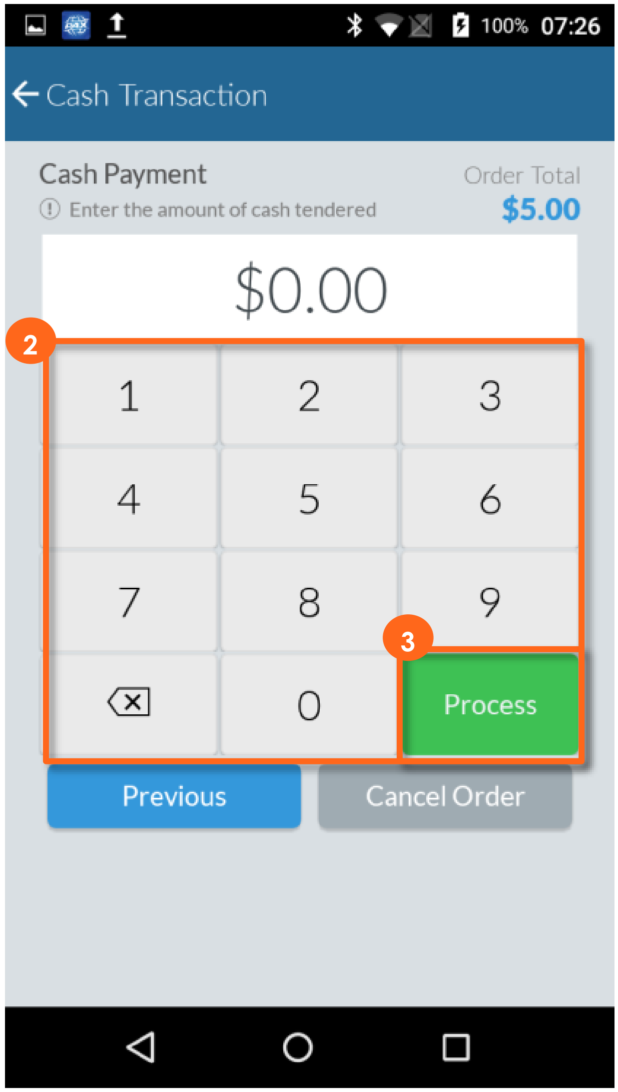
Cash Transaction

To process a cash transaction:

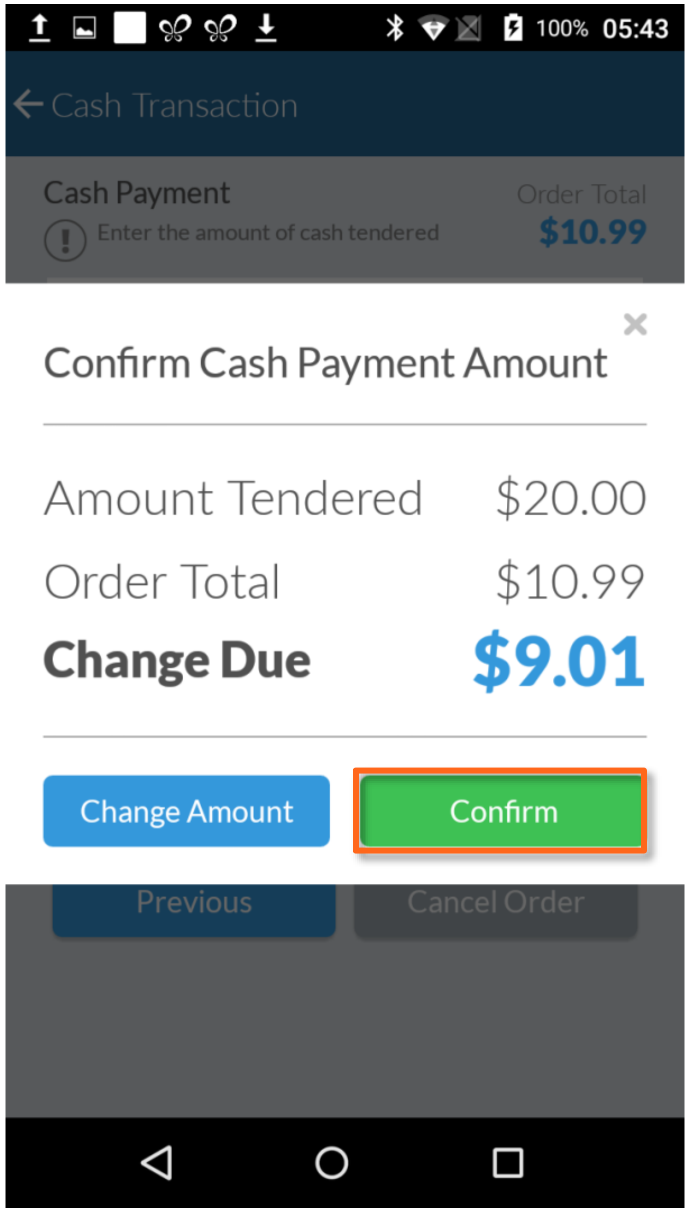
1. Tap **Cash Payment**.



2. Enter the cash amount using the number pad.
3. Tap **Process**.



4. Tap **Confirm** to complete the transaction.



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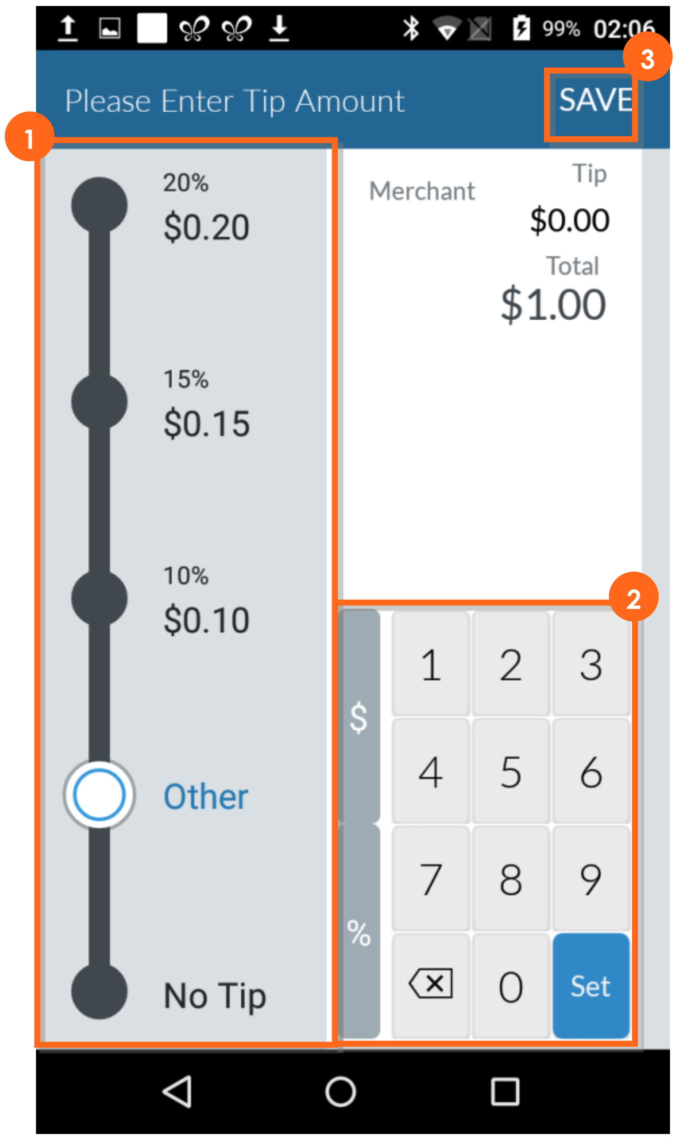
Tips and Signature

1. If you have enabled the tip option in the settings, the customer will select the tip amount.
2. If the customer selects **Other**, a keypad displays to enter the tip amount.
3. The customer taps **SAVE** before confirming the transaction total for an EMV transaction and after credit card approval for non-EMV transaction.



The signature is captured after the transaction is approved. In some circumstances, it is on the same screen as the tip selection.

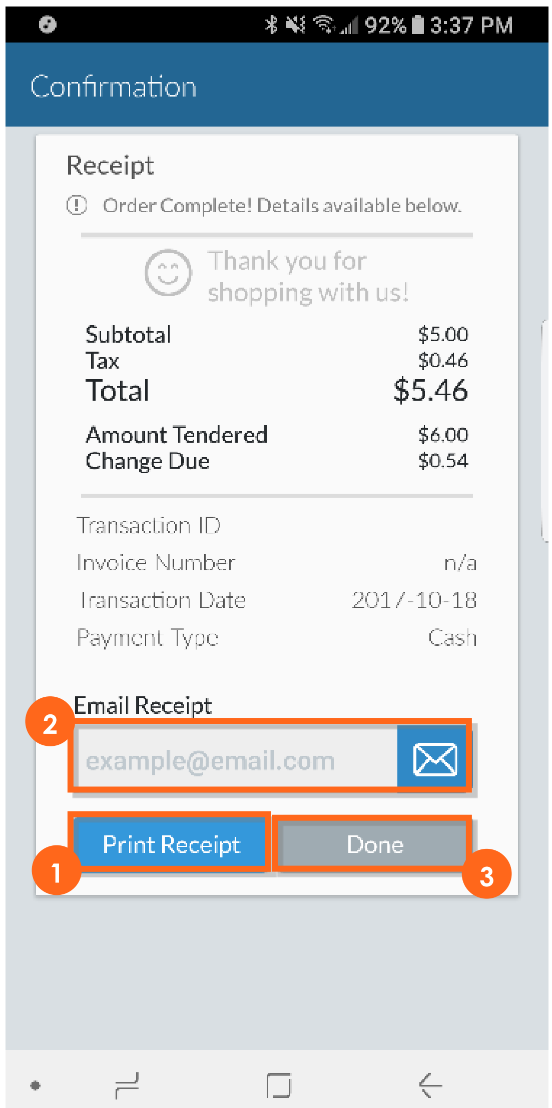
Approved Transaction

The last screen in a successful transaction is the confirmation screen.

1. Tap **Print Receipt** and would like to provide the customer with a printed receipt.

2. Enter an **email address** to send the customer their receipt electronically. If you added a customer while in the register, their email address will be pre-populated. If you enter a new email address, the application will ask if you would like to save that customer.

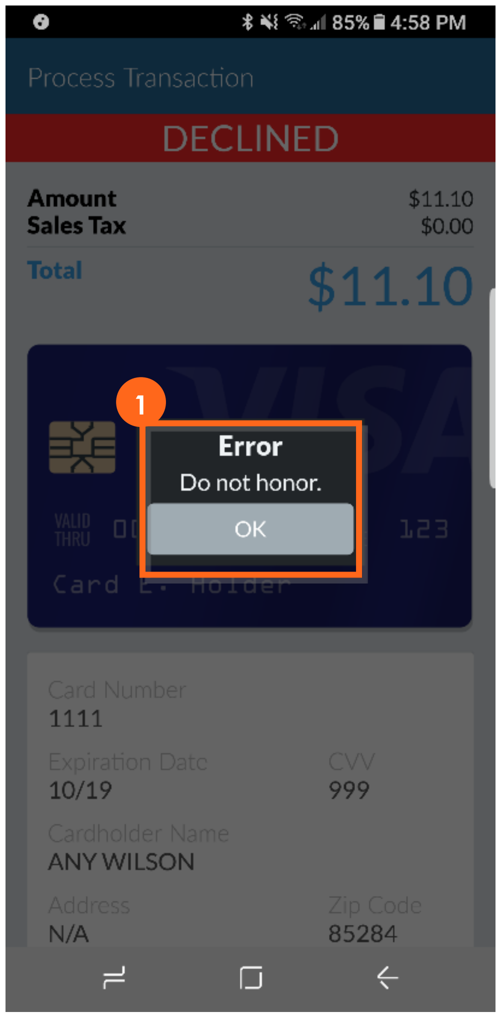
3. Tap **Done** to return to the register.



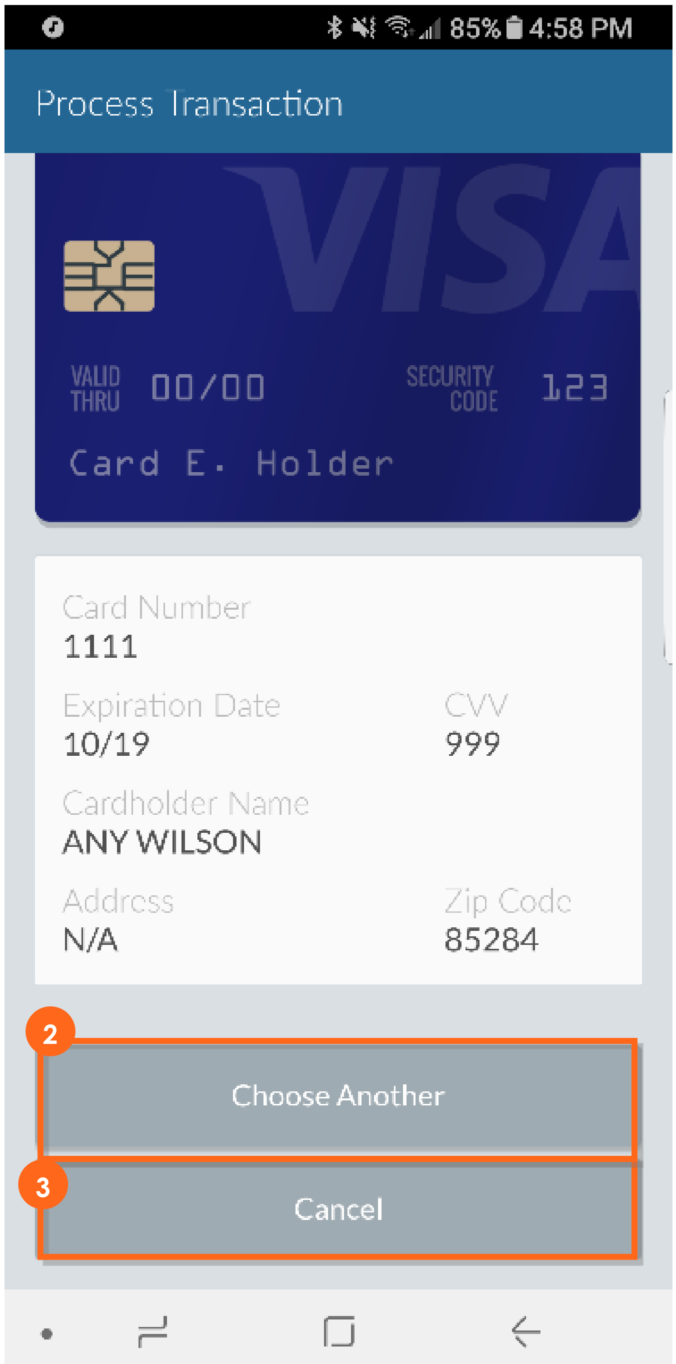
Declined Transaction

When a credit card is declined, you will have the option to go back to the Select Payment Type screen or cancel the order.

1. A declined transaction will include a decline or error message. Tap **OK** to clear the message.



2. On the next screen, tap **Choose Another** to return to the Select Payment Type screen.
3. Tap **Cancel Order** to cancel the transaction completely.



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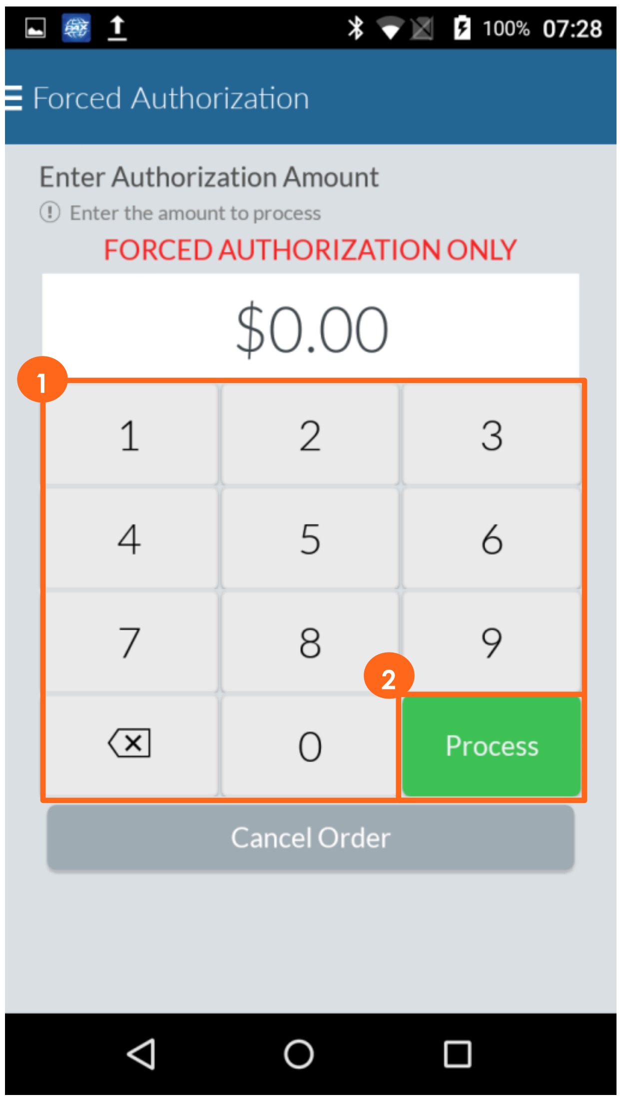
Forced Authorizations

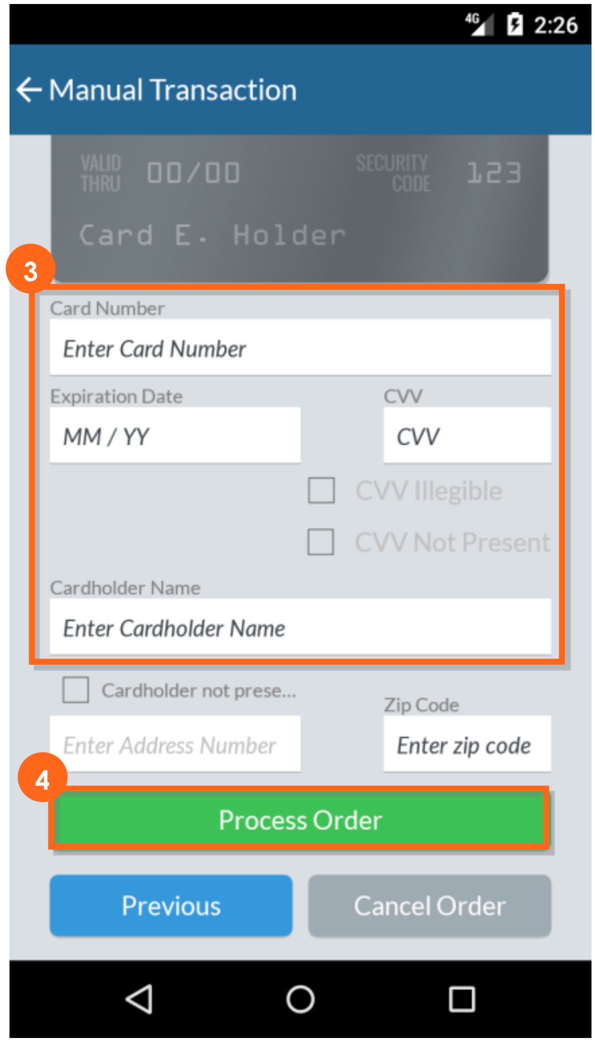
There may be times when you need to enter a forced authorization. Access the Forced Authorization Only feature from the Main Menu. Once you obtain the authorization code provided by voice authorization, you can enter the authorized amount and proceed as you would with a regular transaction. Note: Forced Authorizations are only valid if received via the Voice Authorization phone number.

To process a transaction using the Forced Authorization Only feature:

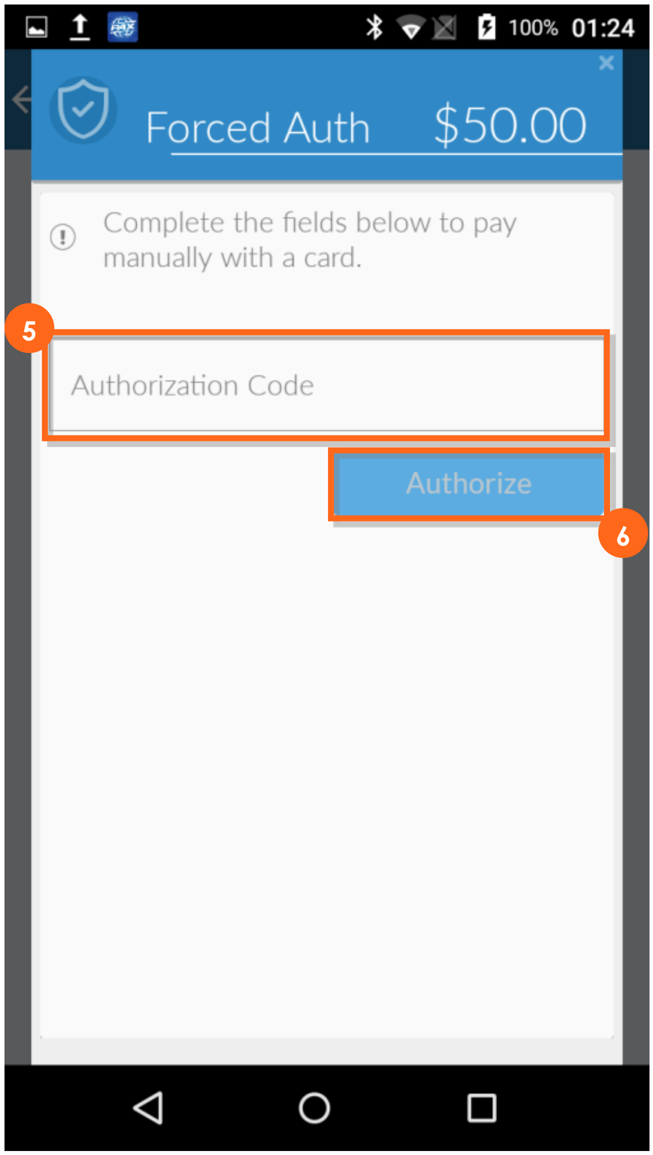
1. Enter the authorized amount using the **number pad.**
2. Tap **Next.**



3. Enter the credit **card information** as you would with a manual card transaction.
4. Tap **Process Order.**



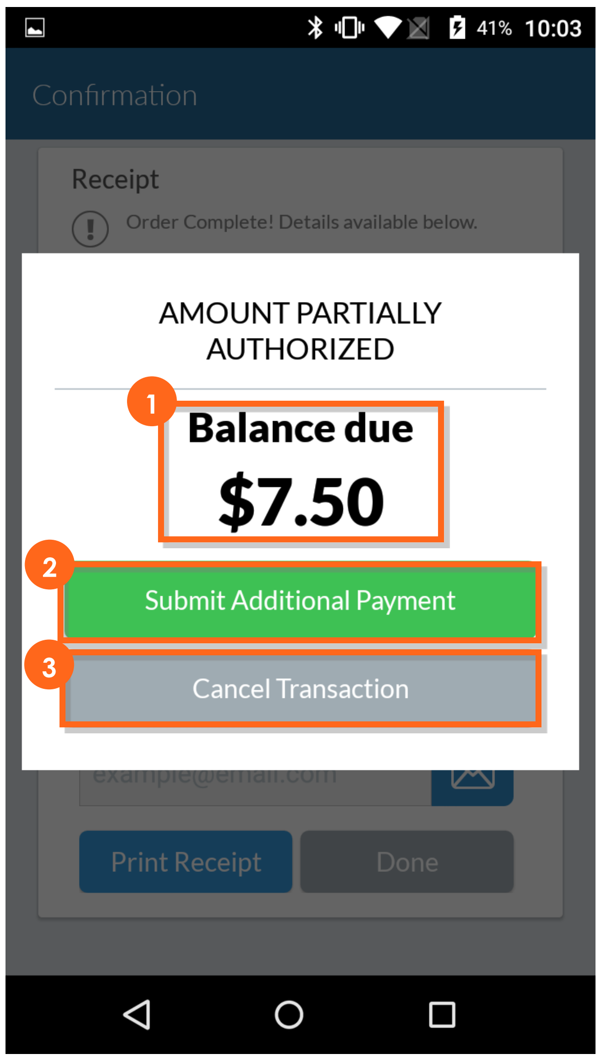
5. Enter the 5- or 6-digit **Authorization code** obtained from the Issuer or Voice Authorization Center.
6. Tap **Authorize** and follow any and all additional steps in order to complete the transaction.



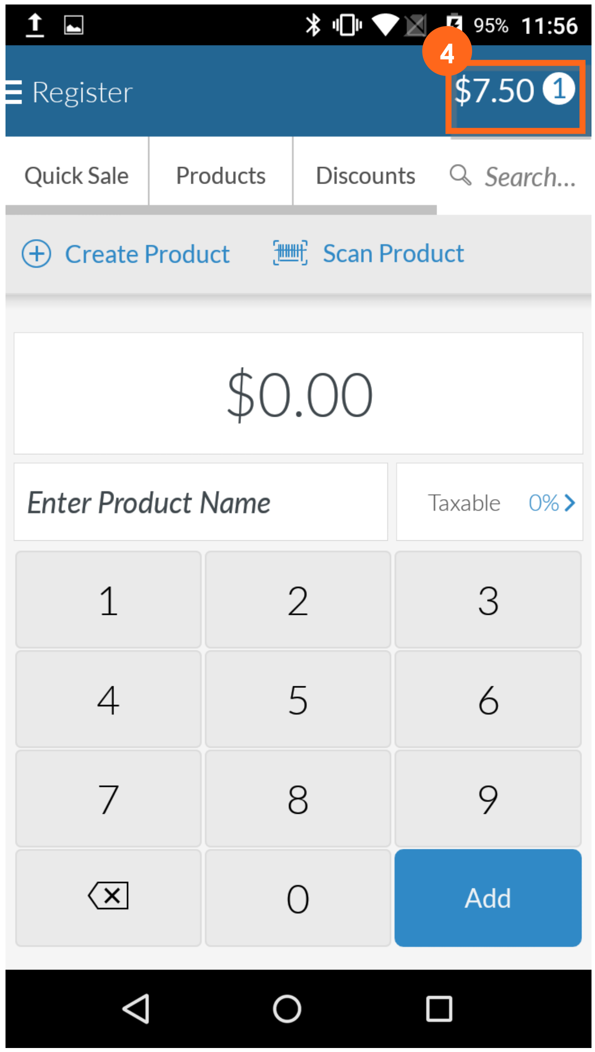
Partial Authorizations

When a customer presents a payment type that does not have sufficient funds to cover their purchase, instead of a decline, you may be given the option to accept a partially authorized transaction.

1. If a payment is authorized for less than the full transaction amount, you will receive a message with the **Balance due** amount.
2. To accept the amount that was approved, tap **Submit Additional Payment.**
3. If either you or the customer chooses not to proceed with the purchase, tap **Cancel Transaction** and the authorization will be voided.



4. If you choose to submit an additional payment, a new transaction will open with the **balance due** already added to the Register. Simply complete this transaction as you would any other to collect the remaining balance.



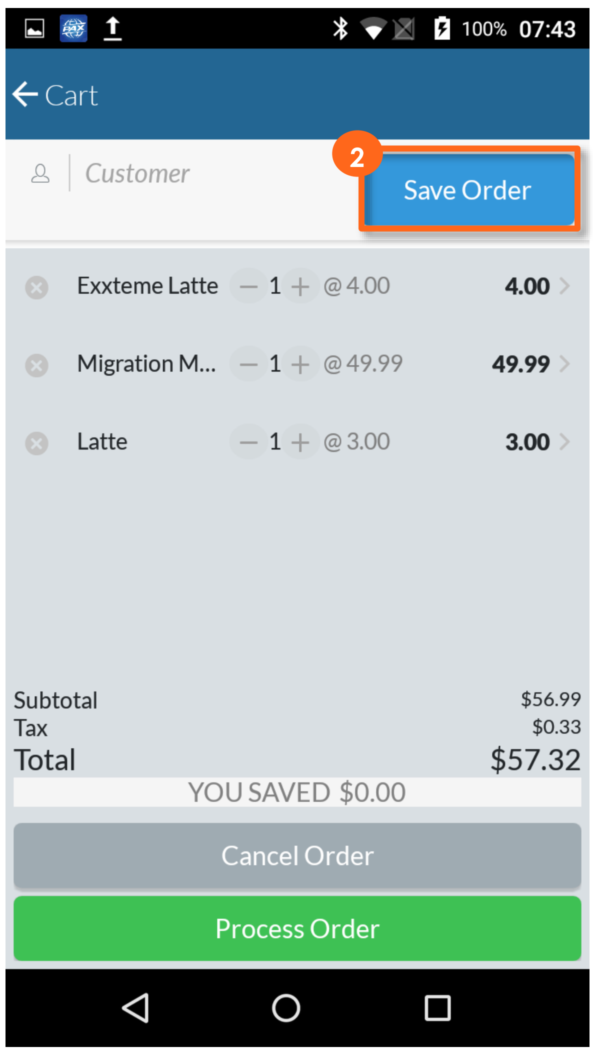
Open Orders

Mobile Payment Acceptance allows you to generate and save orders for future processing or maintain open tabs for same-day processing. Once an order has been saved, you can view, modify, cancel, or process the transaction from the Open Orders page, which is accessible from the Main Menu.

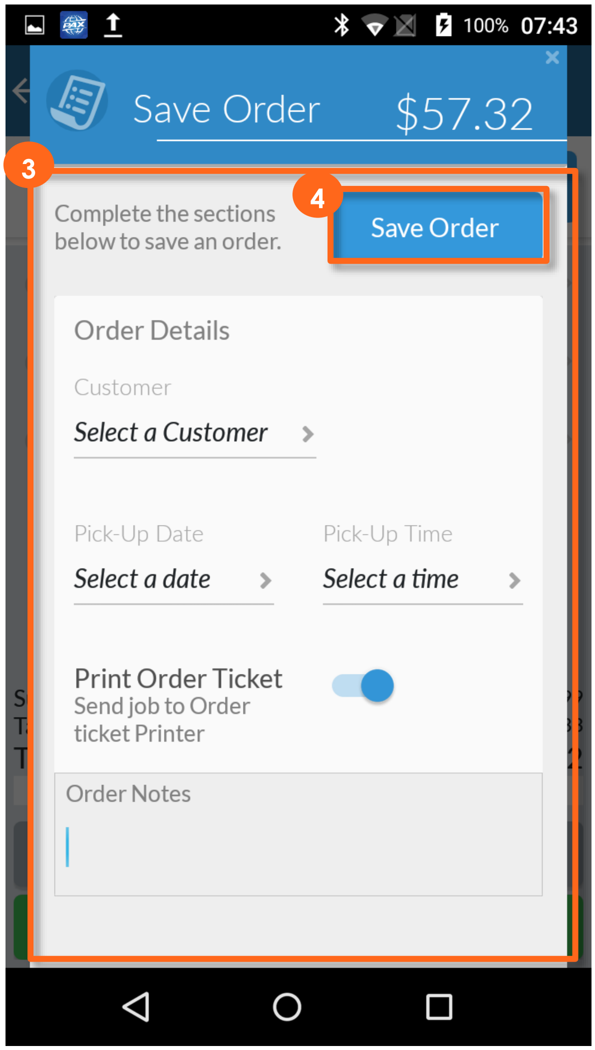
Generate and Save an Order

To generate and save an order for future processing:

2. From the Register, add products to an order as you would with a regular transaction.
3. Tap **Save Order**.



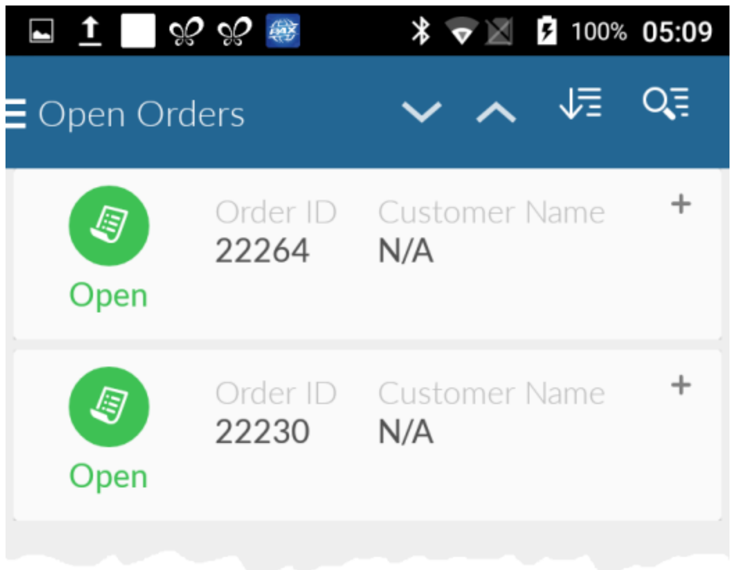
4. Add any pertinent order details, including customer name, pick-up date, pick-up time, and notes.
5. Tap **Save Order**.



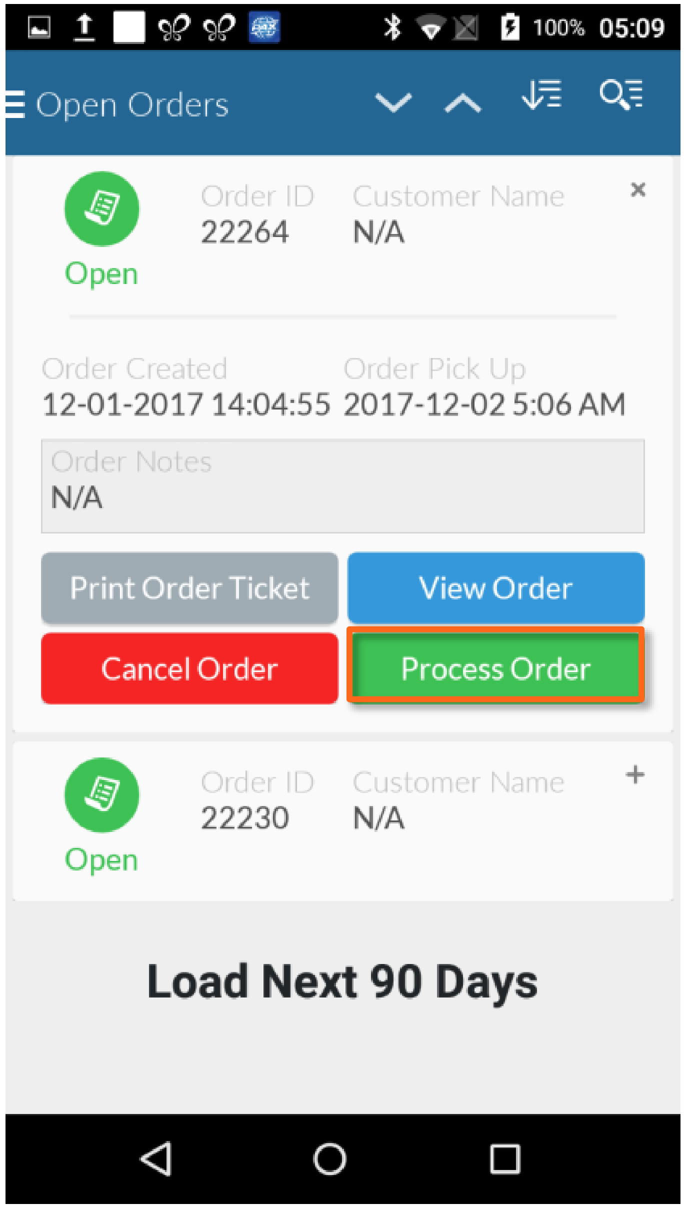
Process an Open Order

To process an open order:

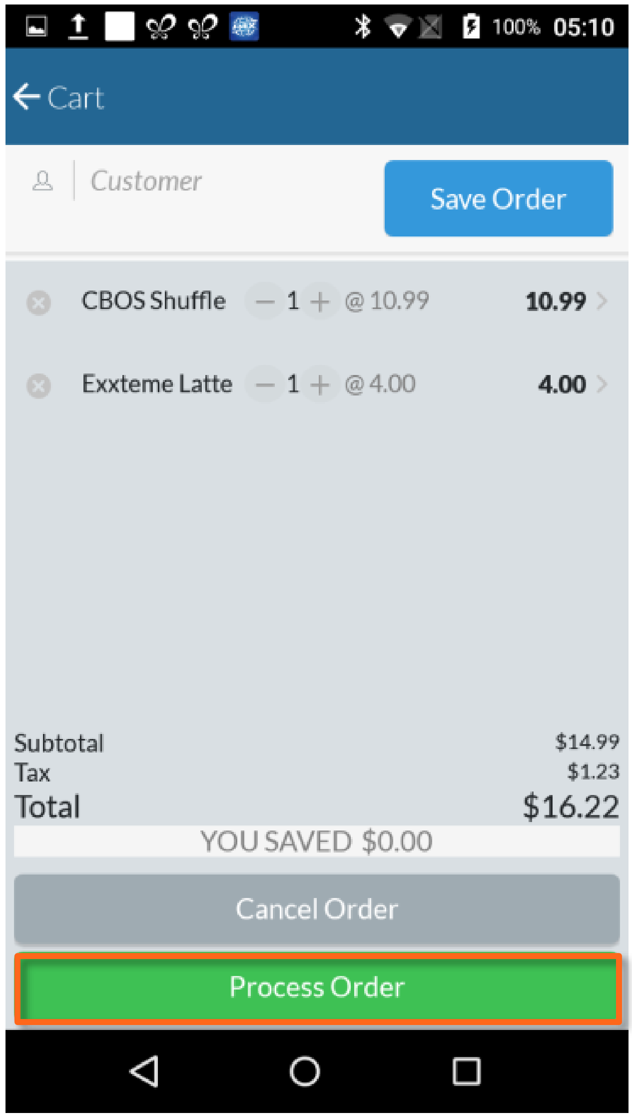
1. From the Main Menu, tap **Open Orders**.
2. Tap the order you wish to process.



3. Tap **Process Order** to close it out; tap View Order to view or modify.



4. Modify the order by adding or removing products, as needed.
5. Tap **Process Order** and proceed as you would with a regular transaction. Tap Save Order to keep the order open.

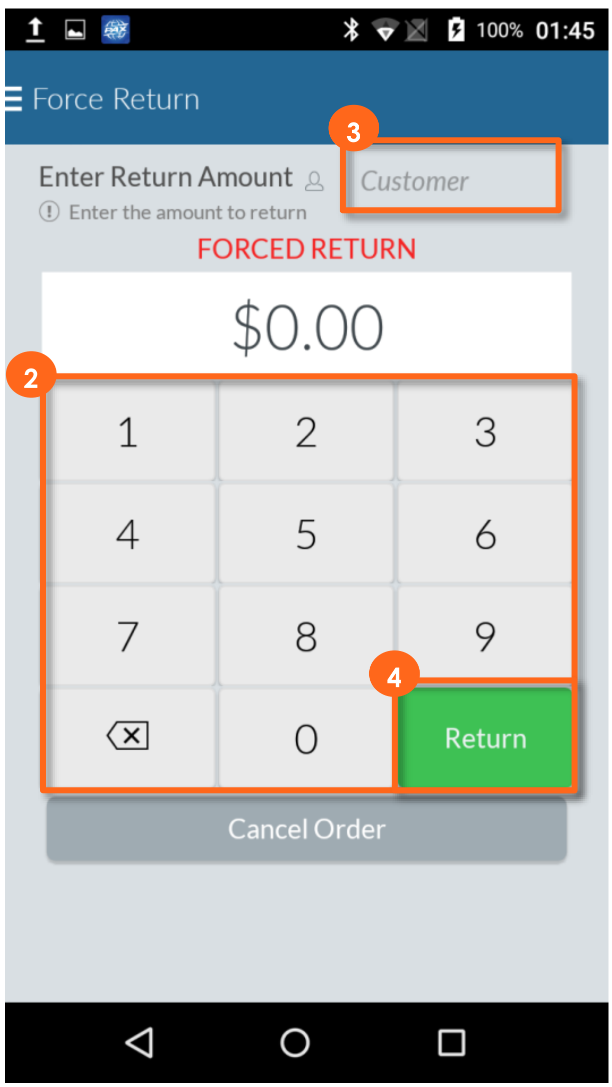


Returns/Reversal/Void

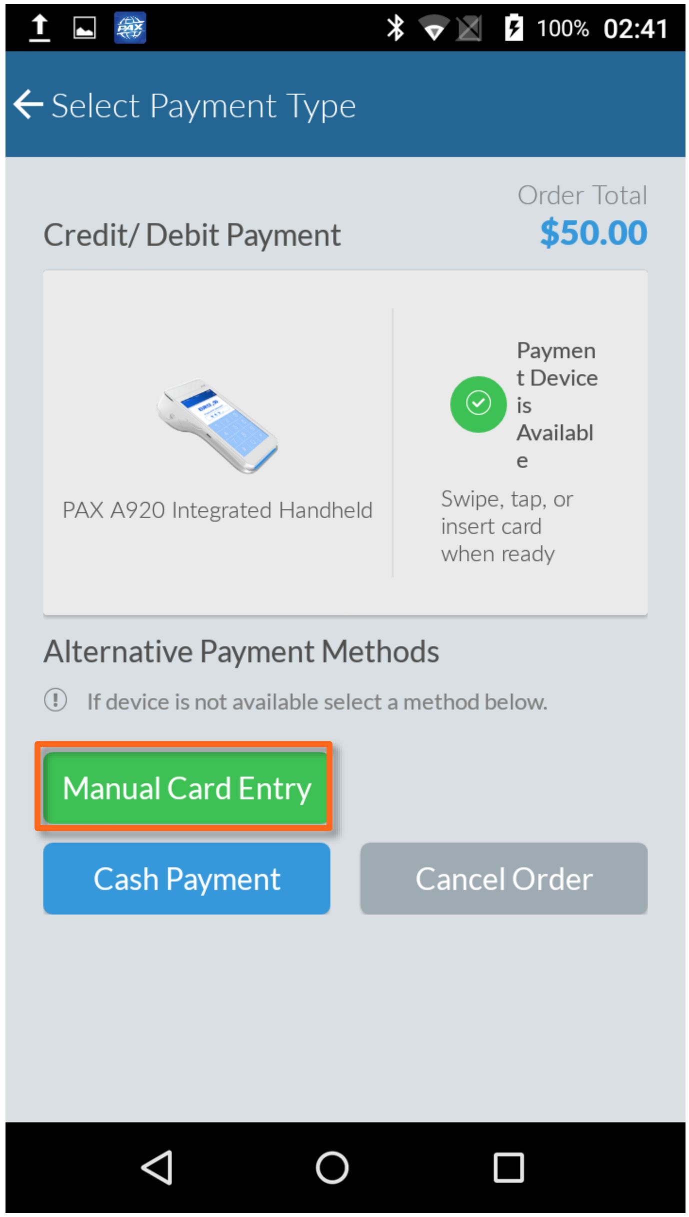
Mobile Payment Acceptance lets you process a full or partial return if a transaction has settled, or a full or partial reversal/void if a transaction has not yet settled. You can force a return for a specified amount or process returns using transaction history.

To force a return:

1. From the Main Menu, tap **Force Return**.
2. Enter the amount you wish to return using the number pad.
3. Select a customer or create a new customer.
4. Tap **Return**.



5. Swipe the card that will be refunded using an available payment device or tap **Manual Card Entry** to proceed as you would with a regular transaction.



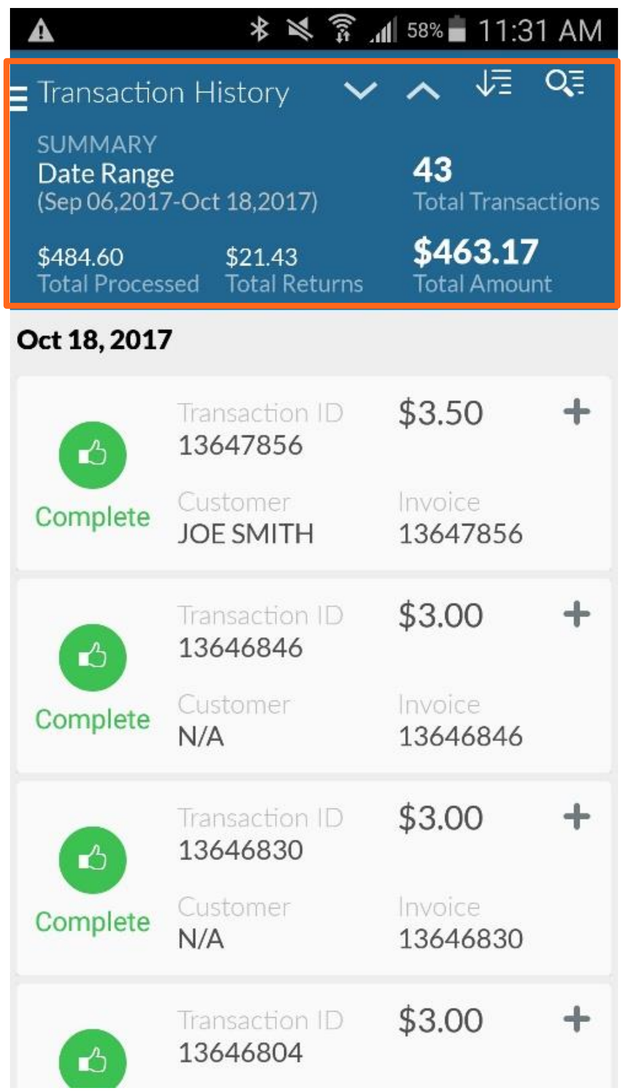
User Guide

History

Transaction History

You can access a list of your transactions from the Transaction History option on the Main Menu of the MPA application. From Transaction History you can filter and search transaction history, view individual transactions and initiate returns. Transaction History provides details for up to 13 months of data as well as the status of each transaction.

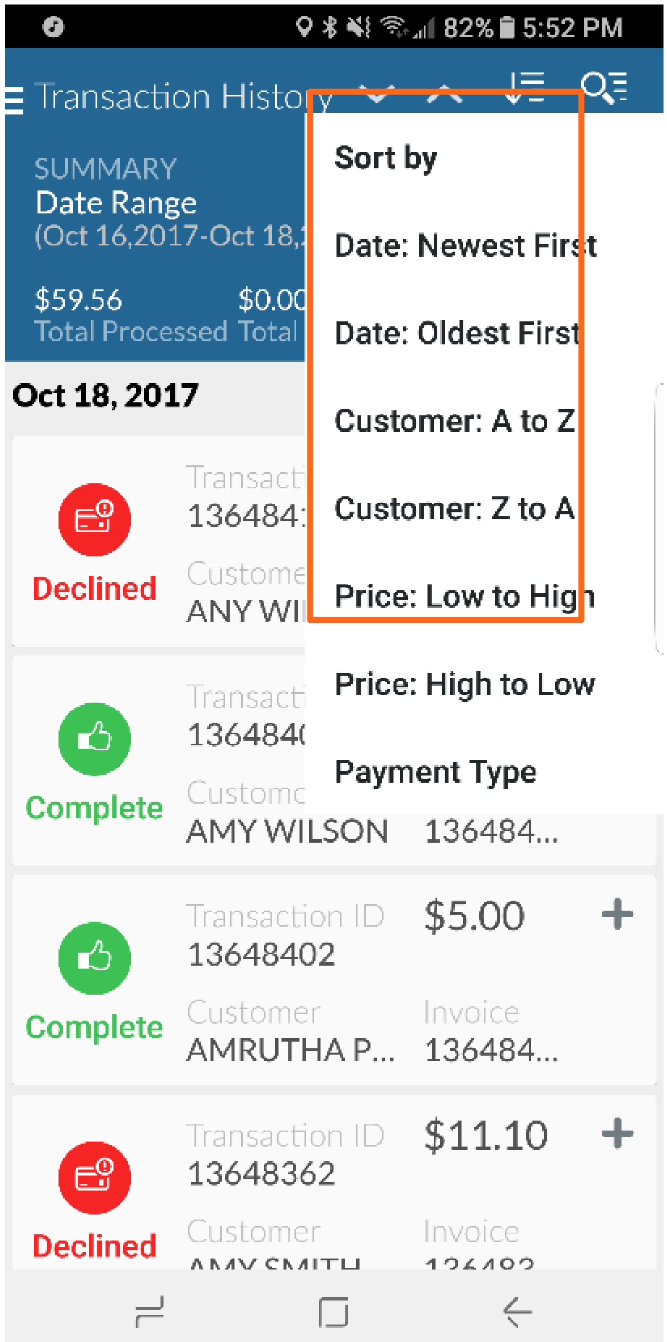
The **Summary details** at the top of the transaction list are for the transactions selected by your sort and filter criteria.



User Guide

Sorting Transactions

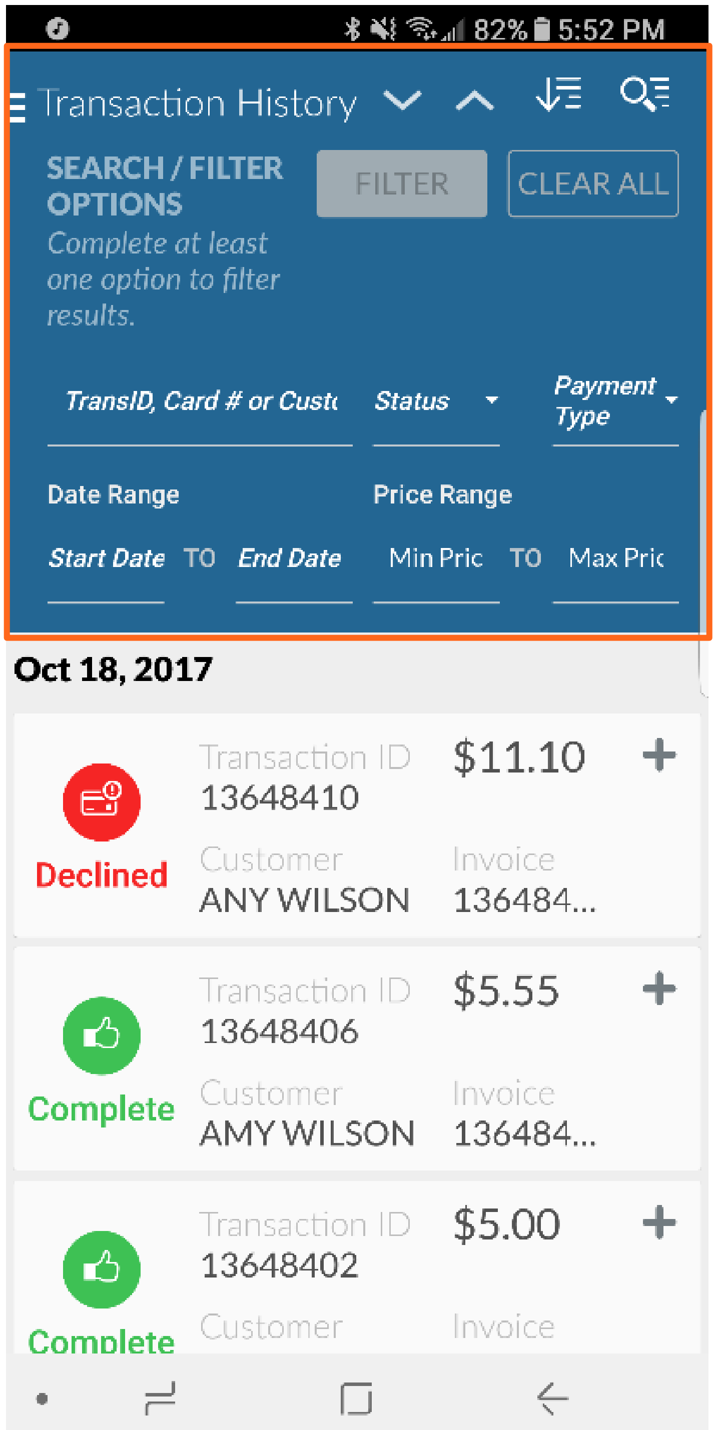
You can **Sort** by Date, Customer, Price and Payment Type.



User Guide

Filtering Transactions

Filter and Search by Transaction ID, Card #, Customer Name, Transaction Status, Payment Type, Date Range and Price Range.

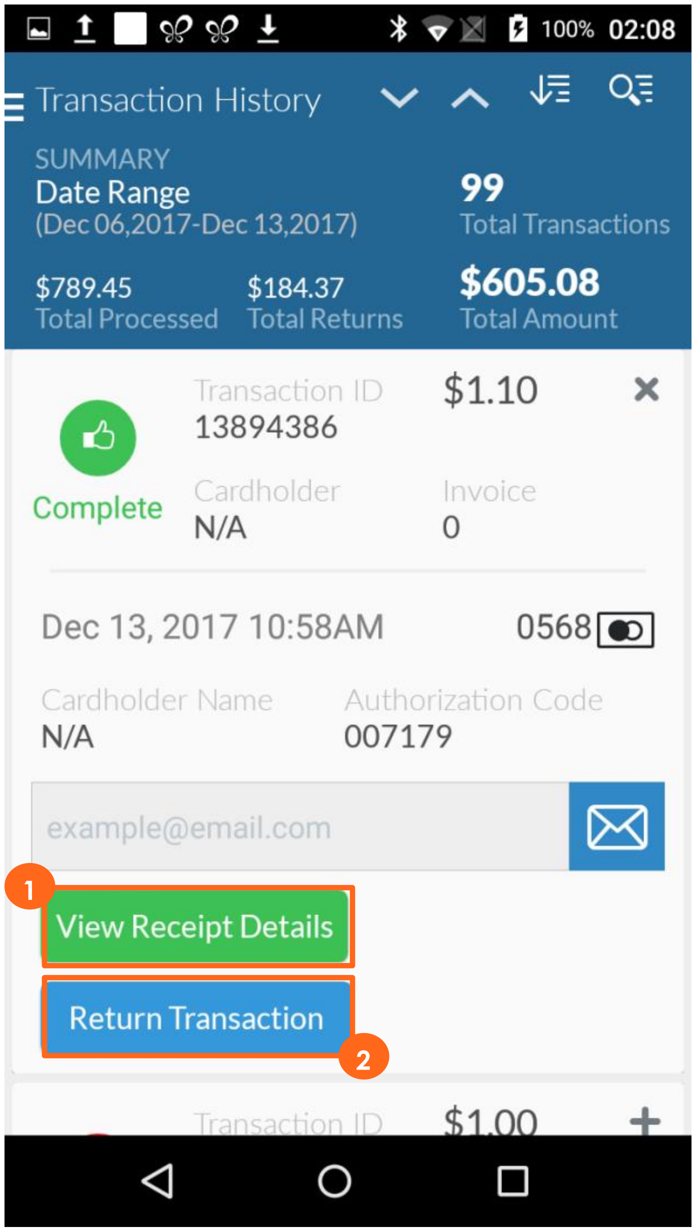


User Guide

Transaction History Actions

Tapping an individual transaction enables you to take the following actions:

1. View Receipt Details.
2. Process a full or partial return (for settled transactions).



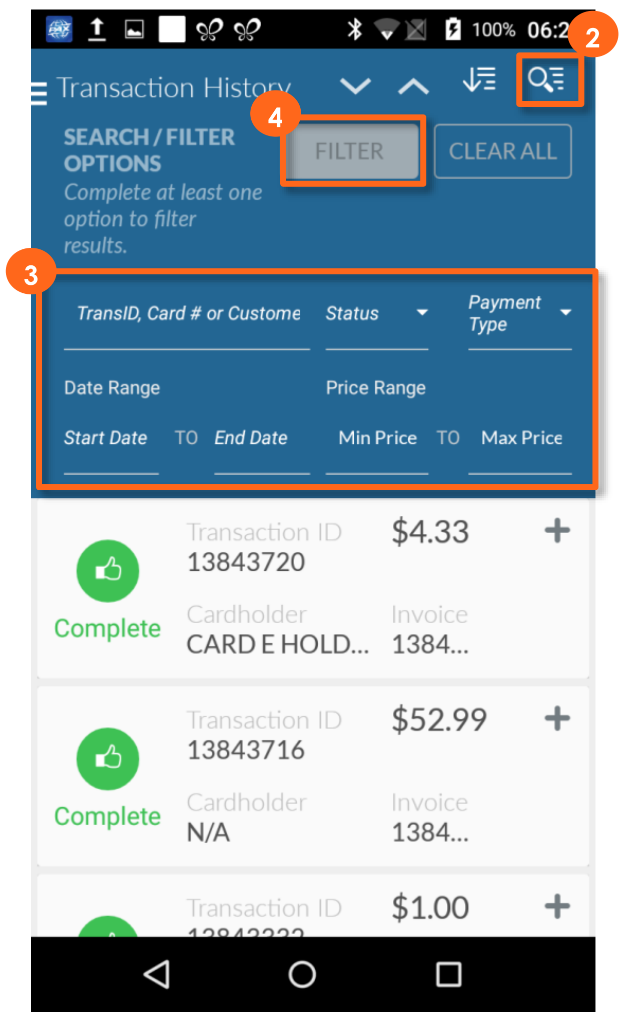
Process a Return from the Transaction History

Processing a return using transaction history allows you to grant returns for specific items and amounts. If you process a partial return, the remaining balance can still be returned; however, you will no longer be able to return the full original amount.

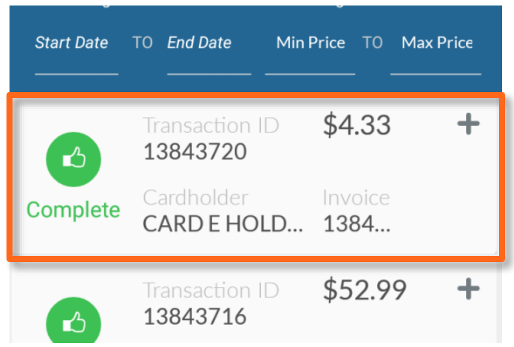
Locate a Transaction

To bring up an order for a return using transaction history:

1. From the Main Menu, tap **Transaction History**.
2. Tap the **Search** icon.
3. Search for a transaction using the Transaction ID or another piece of identifying information.
4. Tap **Filter**.



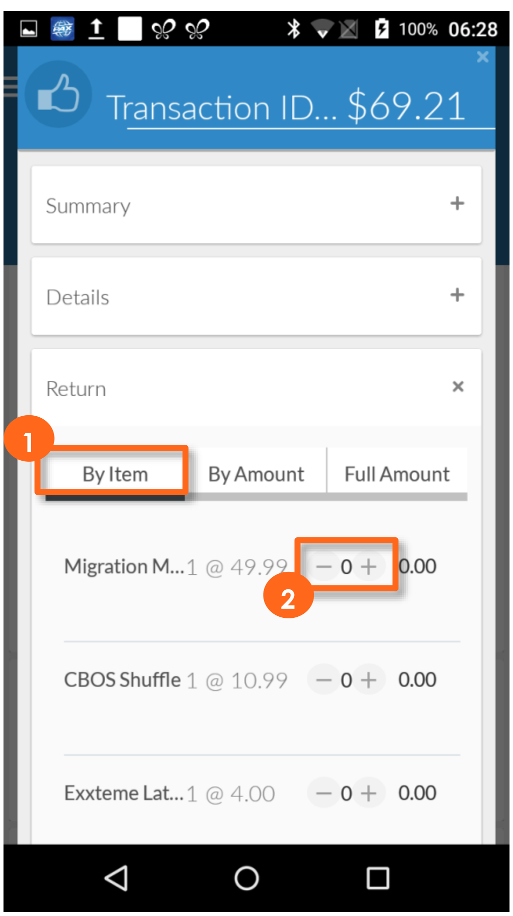
5. Tap the transaction you wish to view.

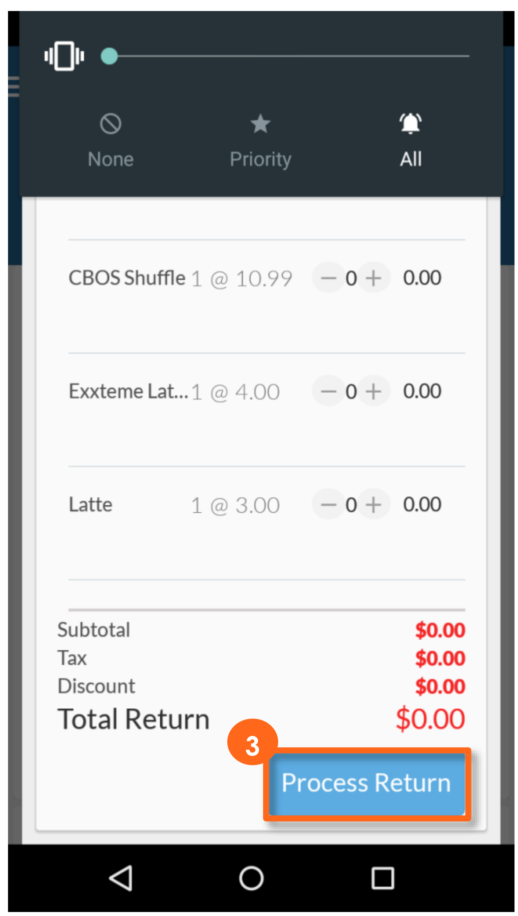


Process a Return by Item

To process a return by item for a selected transaction:

1. Tap **By Item** (this option is selected by default).
2. Tap the **+** and **–** buttons to modify the number of items being returned.
3. Tap **Process Return**.

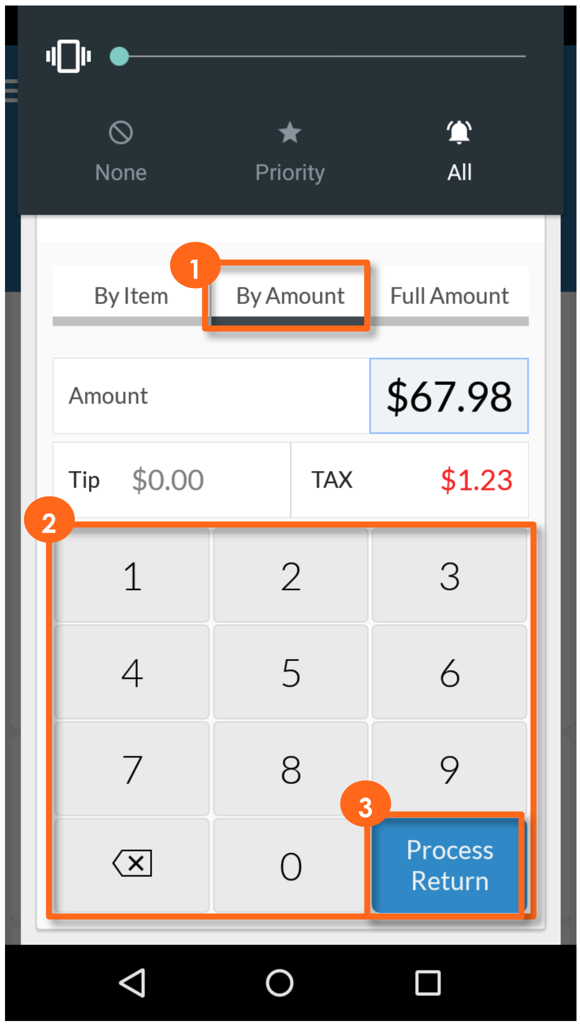




Process a Return by a Partial Amount

To process a return by amount for a selected transaction:

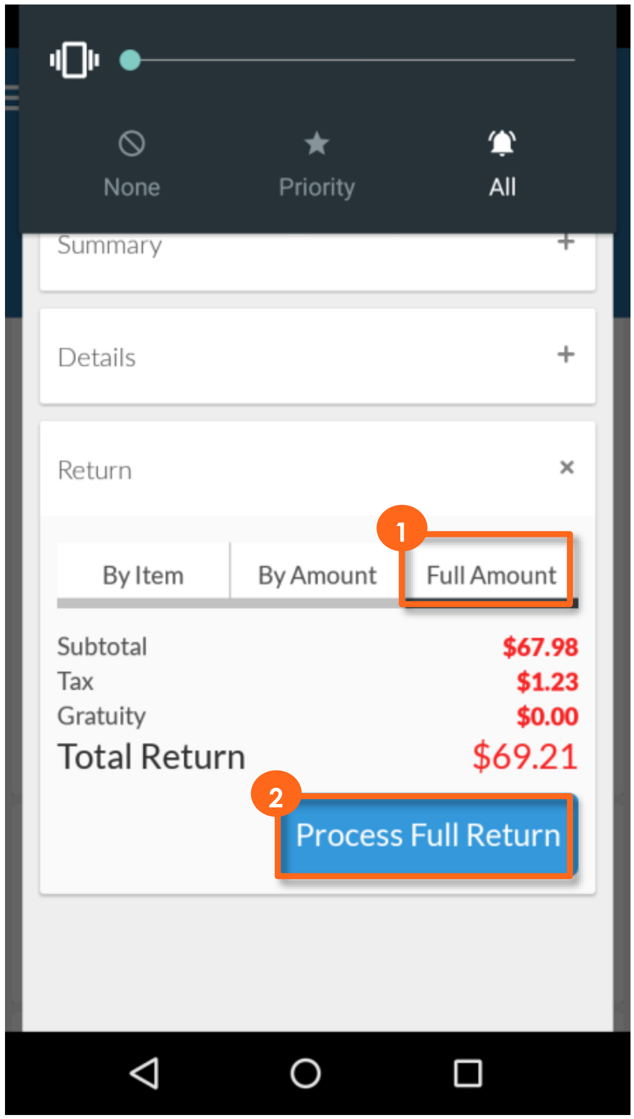
1. Tap **By Amount**.
2. Enter the amount being returned using the number pad.
3. Tap **Process Return**.



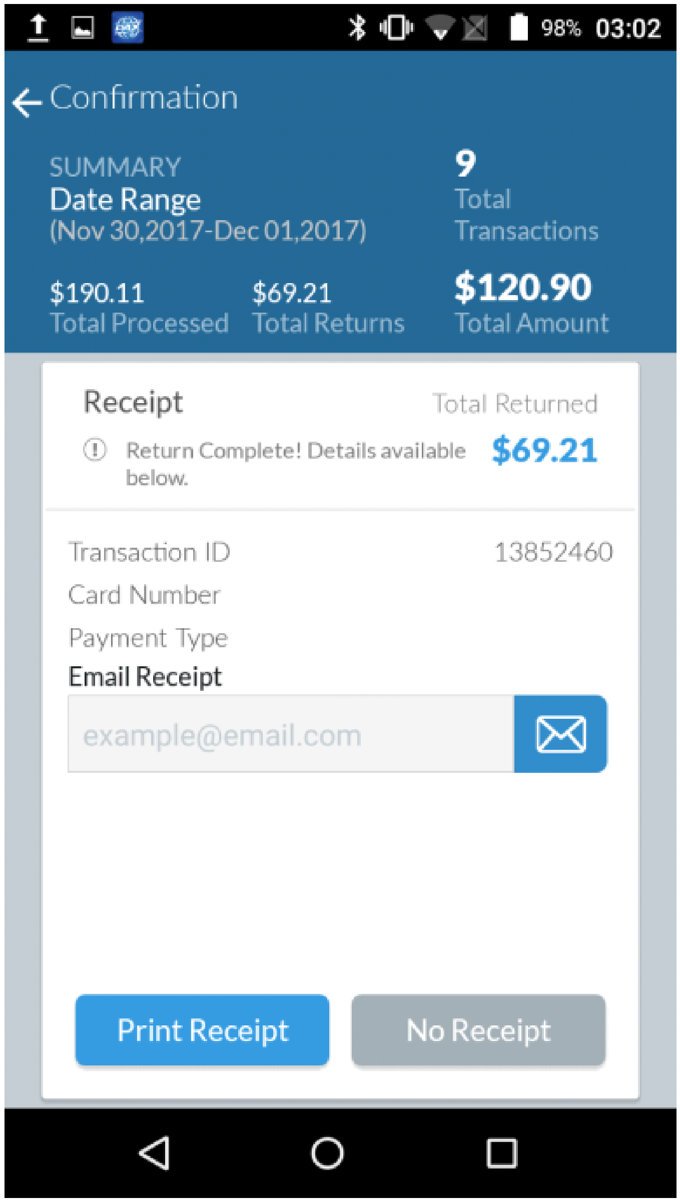
Process a Return for the Full Amount

To process a return for the full amount for a selected transaction:

1. Tap **Full Amount**.
2. Tap **Process Full Return**.

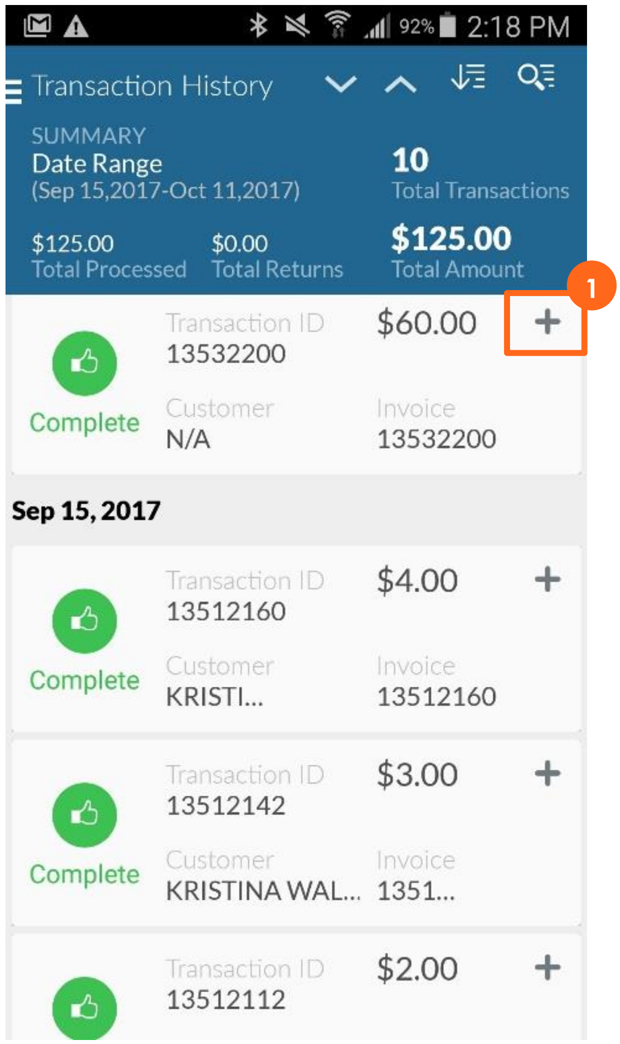


After a return has been successfully processed, the Confirmation page will give you the option of printing or emailing the receipt.

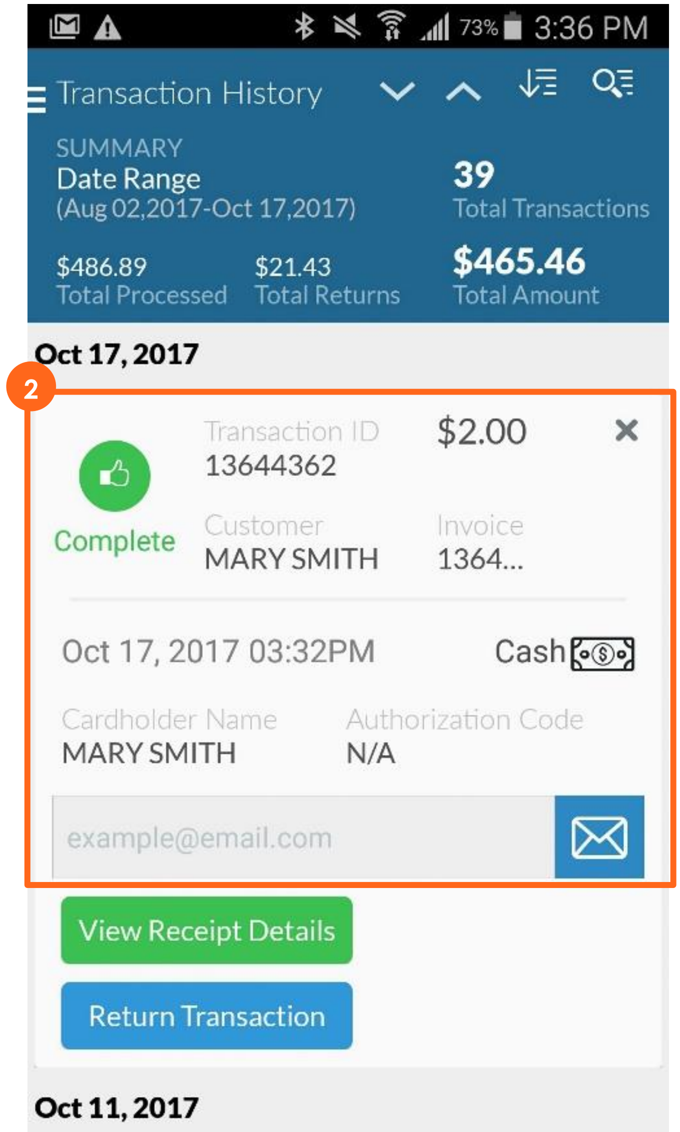


Receipt Details

1. Tap the **+** next to a record to expand it within the list and view additional details.

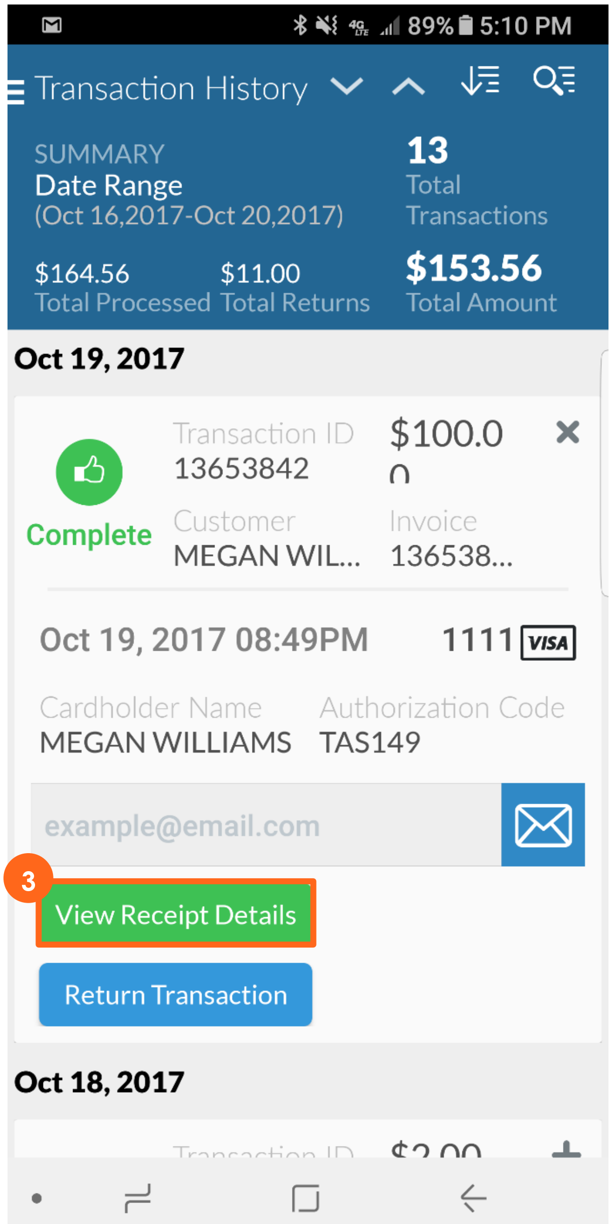


2. In the **expanded transaction record**, view payment type and cardholder name or resend the receipt email.



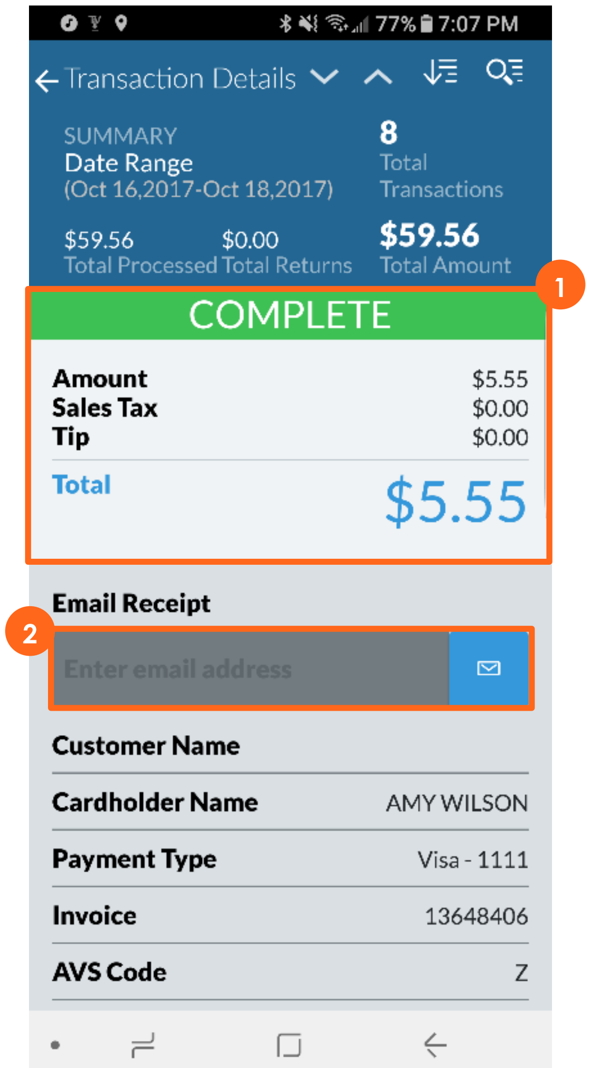
User Guide

3. Tap **View Receipt Details** to view the remaining transaction details.



Receipt Details

1. View additional transaction details on the **View Receipt Details** screen.
2. **Email** the transaction receipt.



User Guide

Back Office/Merchant Center

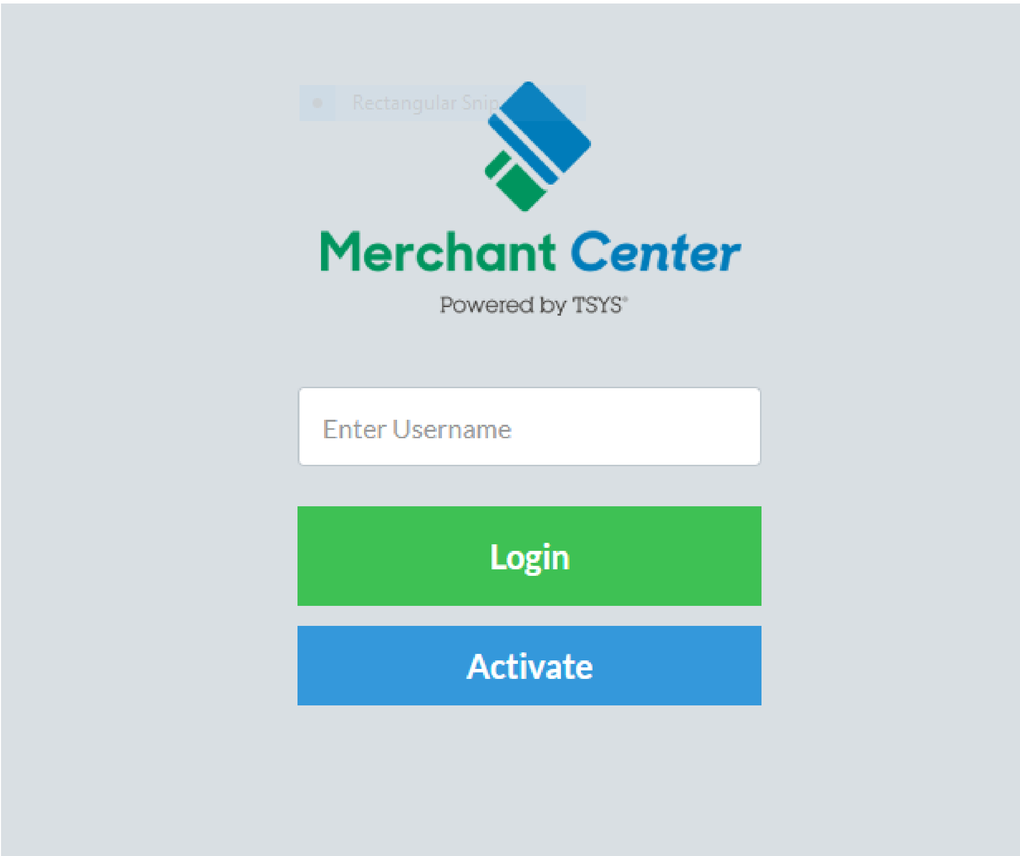
Merchant Center is an online centralized resource for merchants on the TransIT platform. In Merchant Center, you can manage and support your business, control employee access to Mobile Payment Acceptance features, upload or create your product database and track customers.

Log Into Merchant Center

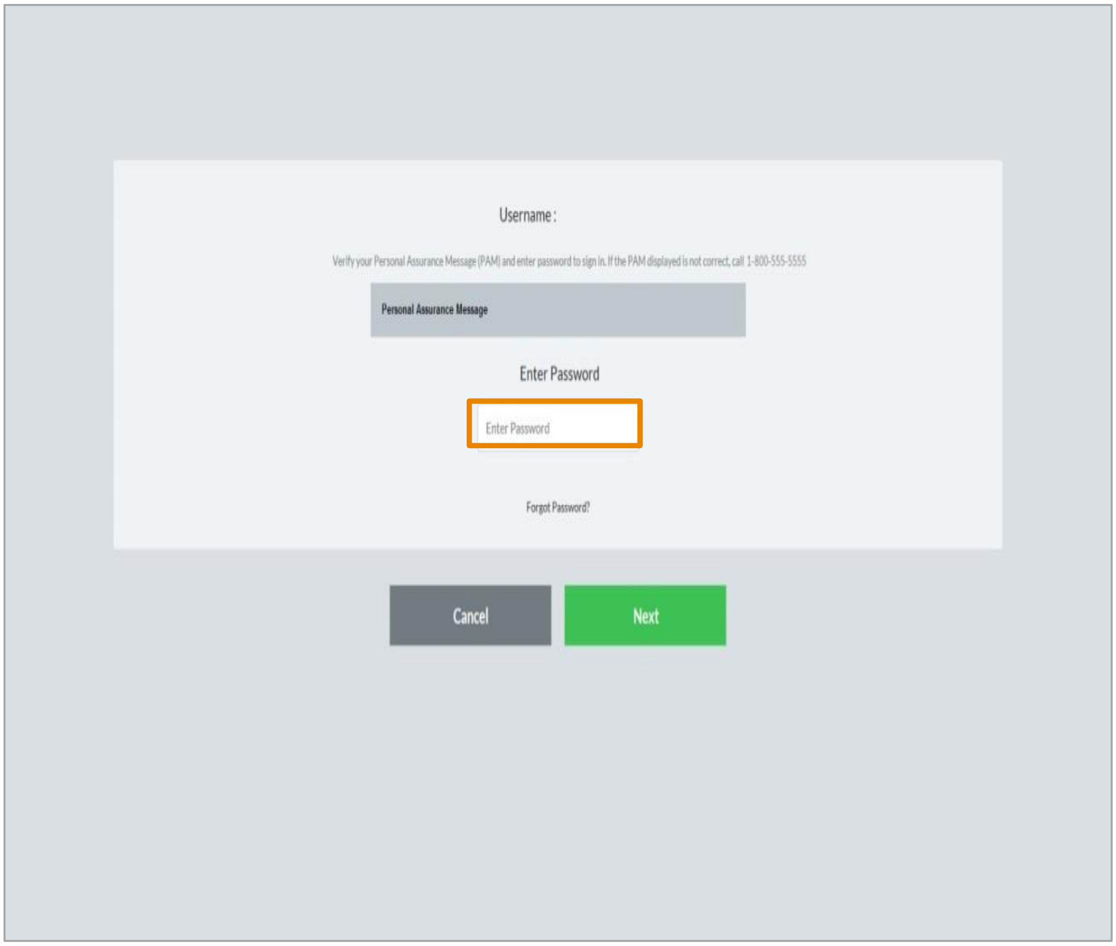
1. From the TransIT Portal (https://merchantcenter.transit-pass.com) enter your TA Number in the Username field.

> **Note**: The TA number was sent in the Transit welcome email. If you do not have your welcome email, contact Customer Support at 600-654-9256.

2. Click **Login**.



3. Enter your password and click **Next**.



User Guide

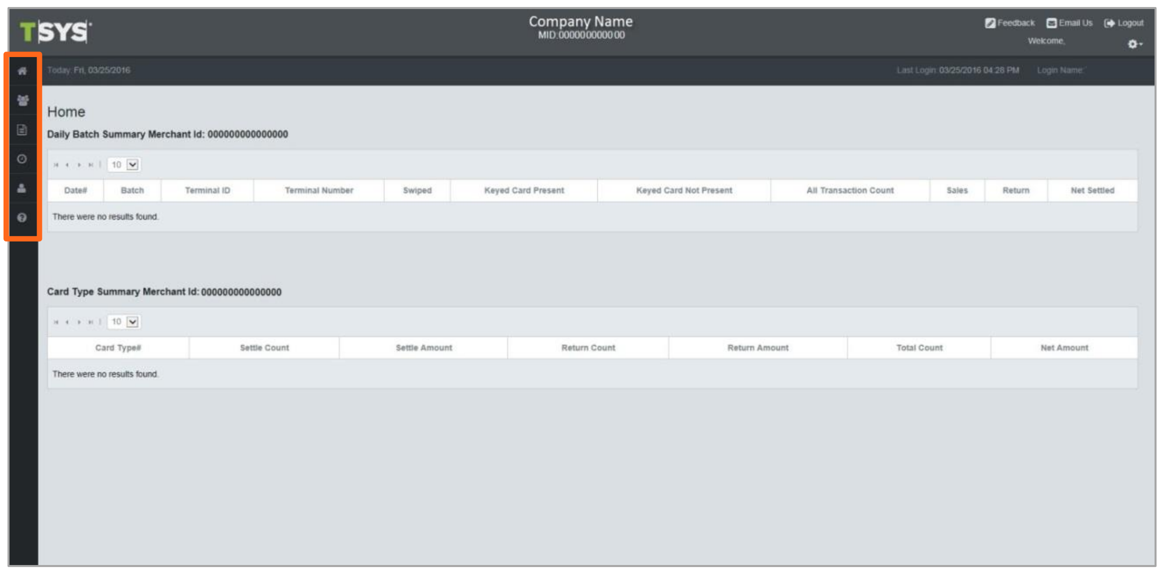
Creating User Profiles in Merchant Center

Mobile Payment Acceptance lets you use multiple user profiles for more control over employee access. You can create and modify MPA user profiles using Merchant Center.

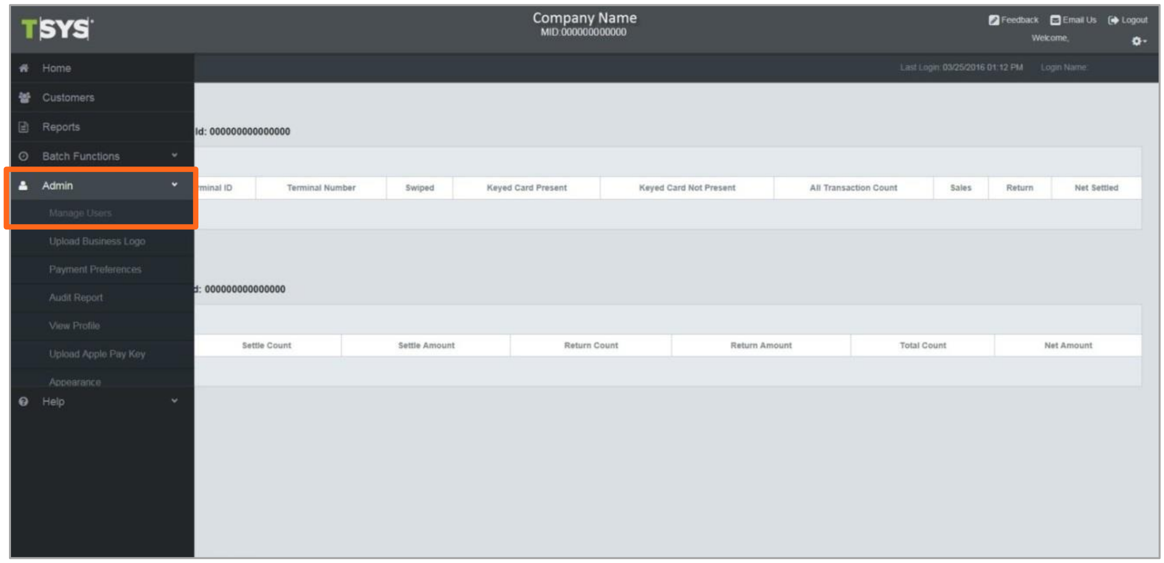
As a merchant, there are two roles that you can assign to a new user profile: Supervisor and Operator. These two roles are assigned default permissions, but they can be customized on an individual basis to suit your business needs. Both roles can be granted similar permissions; however, the Operator role cannot be given access to certain reports, such as customer data. In order to create a new user profile, you will need the TA Number and password associated with your MPA account.

To create a new MPA user profile in Merchant Center:

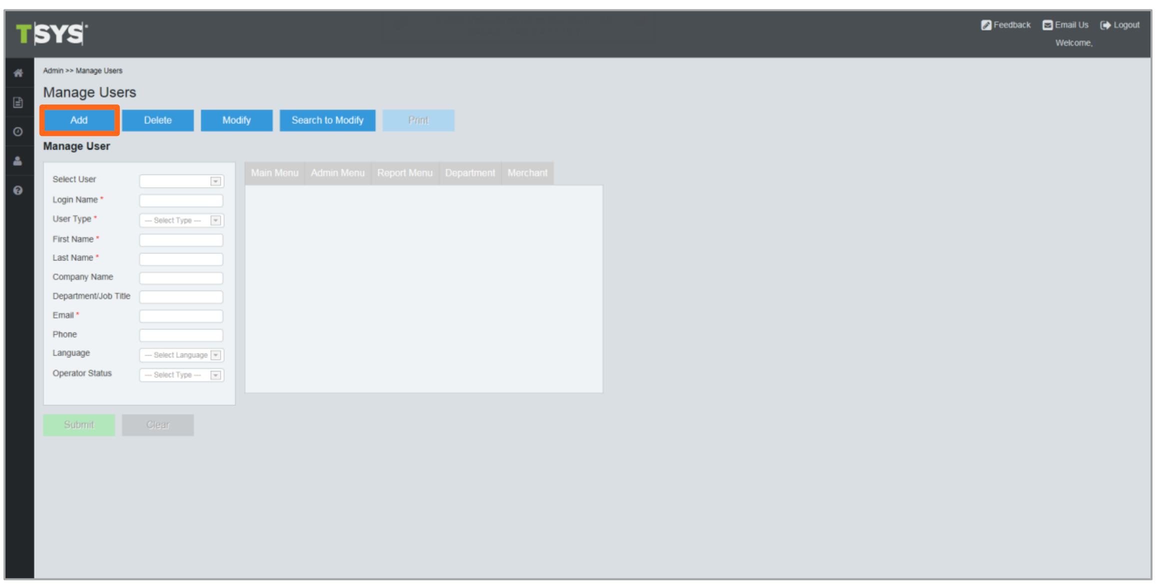
1. Mouse over the Menu bar on the left-hand side of the screen.



2. Click **Admin** to expand the dropdown menu.
3. Select Manage Users.

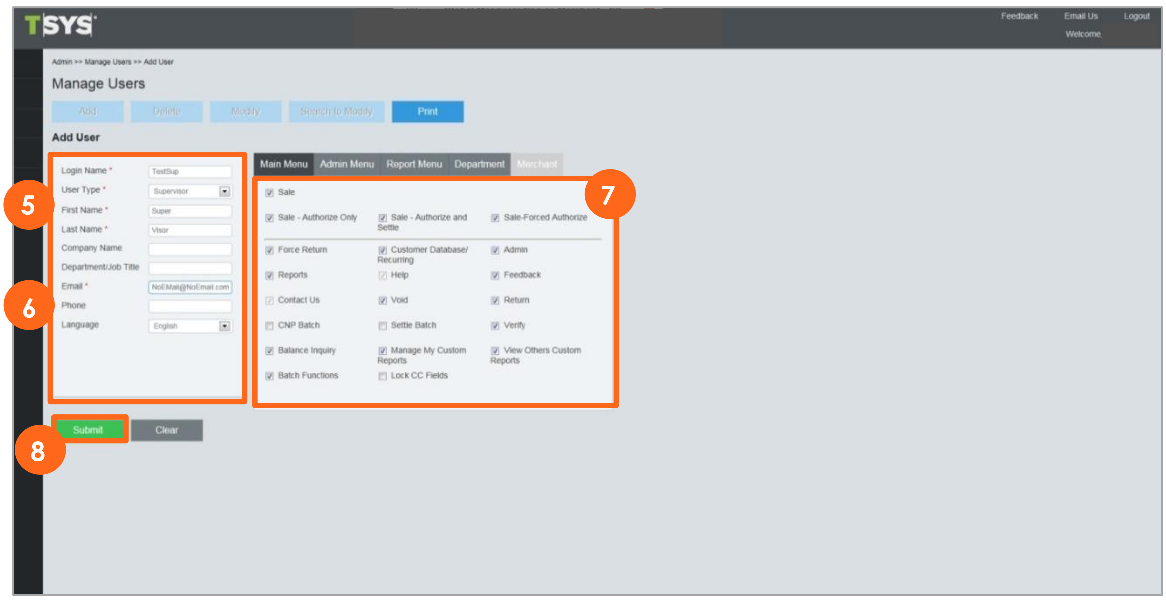


4. Click **Add**.



User Guide

5. Select **Supervisor** or **Operator** from the User Type dropdown menu. Doing so will auto-populate user permissions that are typical for that role.
6. Complete the required fields under Add User. Note that the email address you provide will receive a confirmation email with a temporary password for this user upon completion of the new profile.
7. Customize the user profile by selecting or deselecting permissions from the tabbed menus on the right.
8. Click **Submit** to complete the user profile creation process.



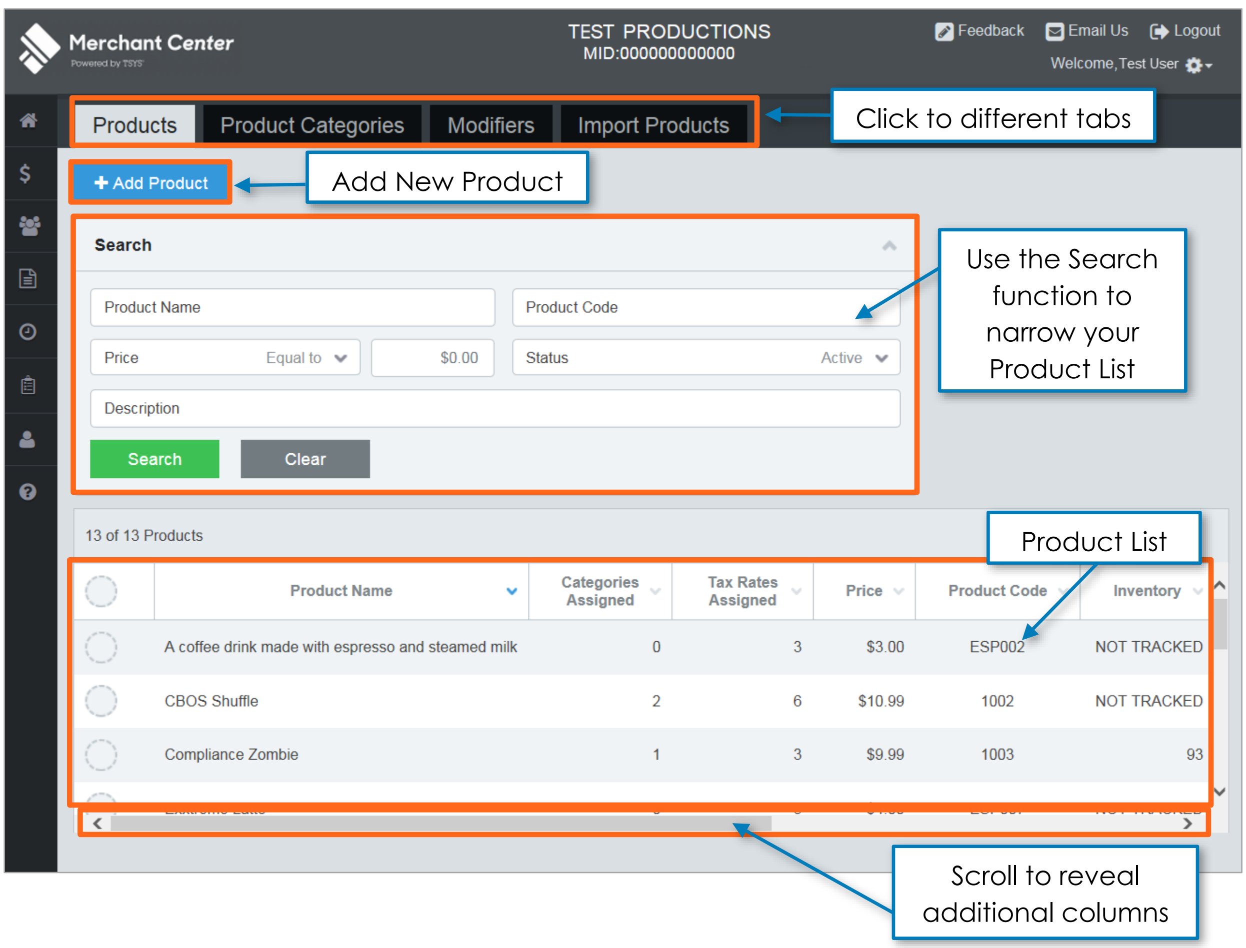
You can also use the Manage Users page to delete or modify existing user profiles. Deleting a user profile can be useful when making personnel changes or preventing a security breach in case of lost or stolen login information. Modifying user profiles allows you to be flexible as business needs change—for instance, not only can you modify individual permissions, you can also modify the role assigned to a given user profile.

User Guide

Creating and Managing Products In Merchant Center

For Mobile Payment Acceptance Users, Merchant Center provides the ability to flexibly create and manage product information. To add a new product to your inventory, you only need a few pieces of basic information. For greater customization, you can assign product categories, taxes, discounts, modifiers (i.e., extras, add-ons, etc.), and variations (e.g., size, color, etc.). It is recommended that you set up categories and taxes first, because otherwise they will not be available when adding a product. Discounts, modifiers, and variations can be set up later because they can only be added to existing products. Most product-related functions in Merchant Center are performed on the Products page; however, discounts and taxes can only be accessed from the Admin menu. If you prefer, you can also upload multiple products to your inventory at once using the Import Products function.

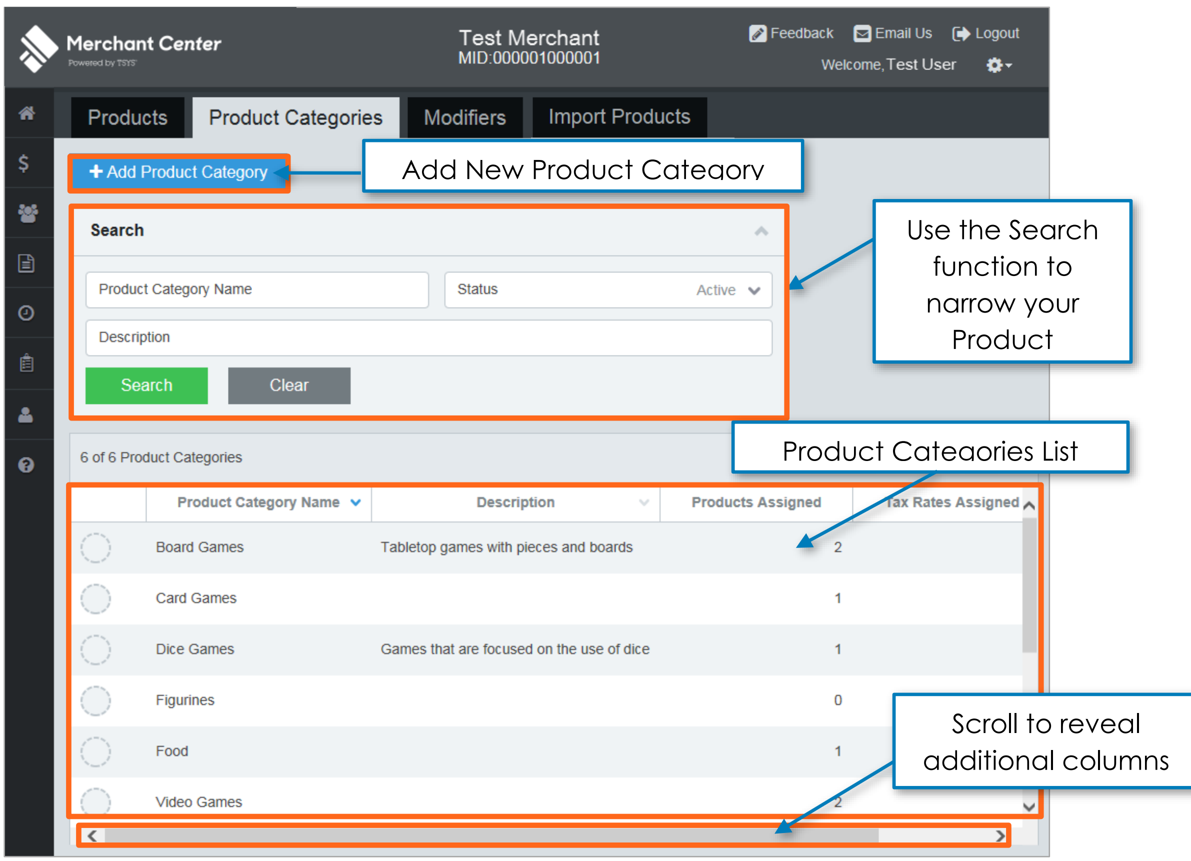
Products Page



Product Categories

Product categories help you manage your inventory by letting you group similar products together. For example, you could assign coffee, tea, and soda to a single "Drinks" category. Conversely, you can add a single product to multiple categories. From the Product Categories page, you can add new categories or view and manage existing ones. You can access the Product Categories page from the Products page, which is accessible from the Main Menu.

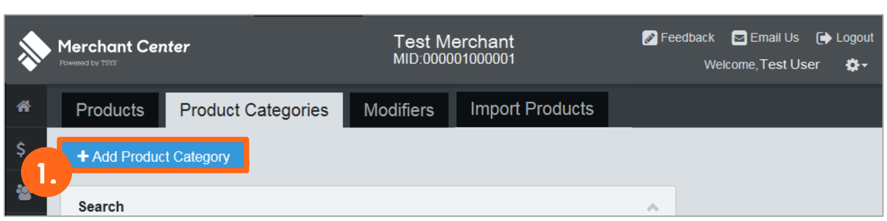
Product Categories Page



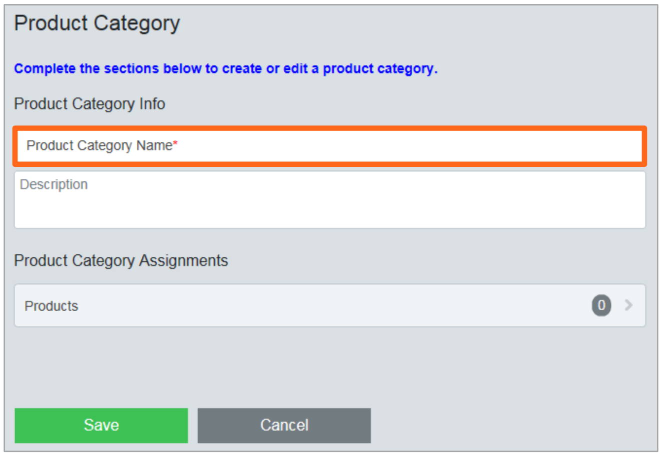
Adding Product Categories

To add a new category from the Product Categories page, complete the following steps:

1. Click the **Add Product Category** button. This will bring up the Product Category page.



2. Type a name in the **Product Category Name** field.
3. Type a description in the **Description** field.
4. Click **Save**. Your product category will now be available to be assigned to your new product.

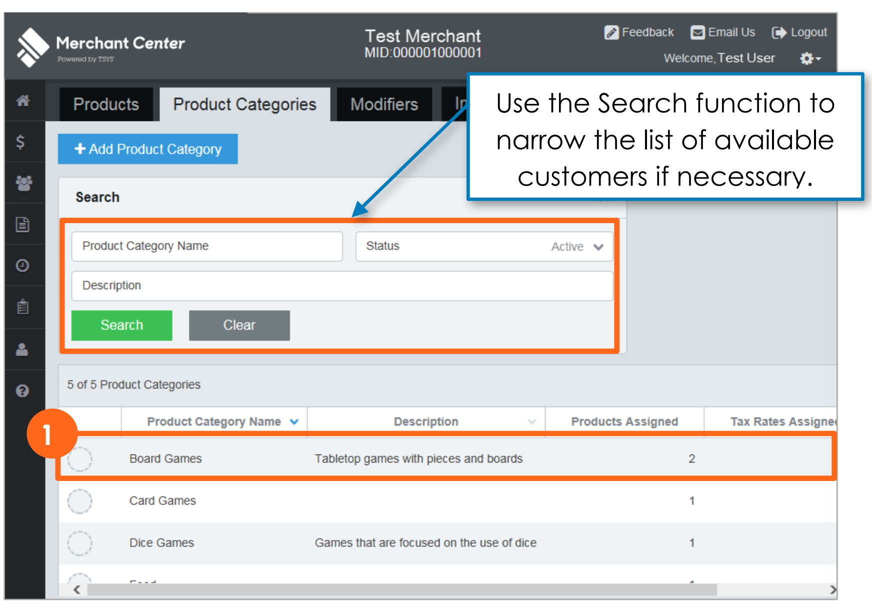


Deactivating Product Categories

Once you have created a product category, you cannot delete it; however, you can deactivate it so it does not appear in your default Product Categories list.

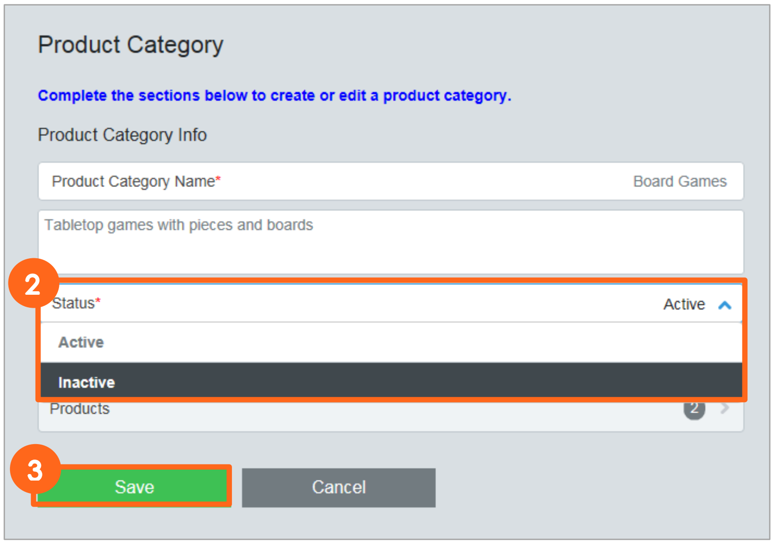
To deactivate a product category from the Product Categories page, complete the following steps:

1. Click the desired **Product Category Name** in the **Product Category List**. If necessary, use the **Search** function to narrow the number of available choices.



2. Select **Inactive** from the **Status** dropdown menu.
3. Click **Save**.

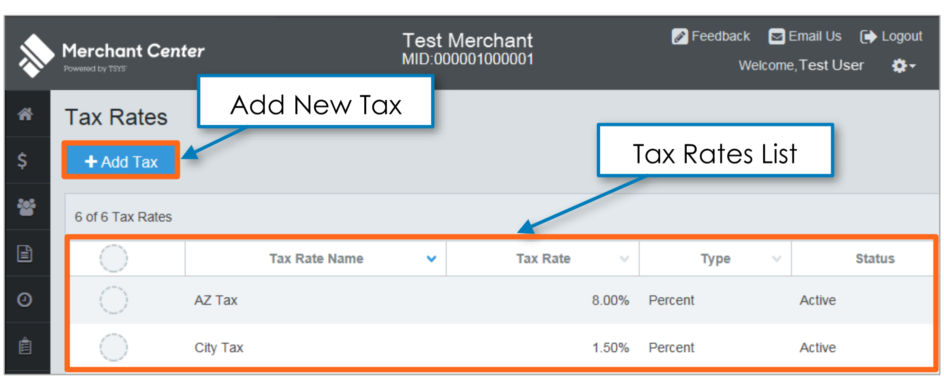
   Note: All assigned products must be removed from the product category before it can be deactivated.



Tax Rates

Sales tax must be collected for the sale of goods and services, but before you can apply a tax to a product, you must first create it in Merchant Center. There are two types of tax rates: individual taxes, which must be assigned to each product, and global taxes, which are applied to all products by default. Global taxes can only be created in Merchant Center. Note that tax rates can be added, edited, and turned on or off, but they cannot be deleted, and that only twenty tax rates can be applied to a product at one time. You can access the Tax Rates page from the Admin section of the Main Menu.

Tax Rates Page

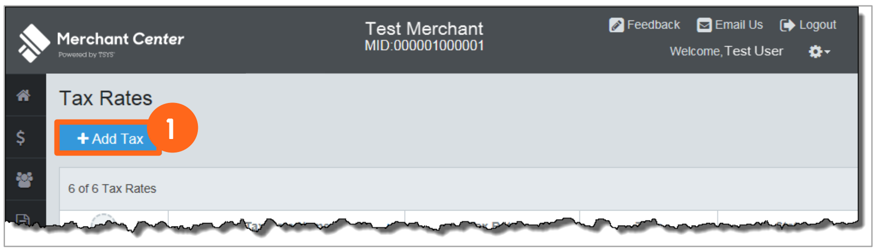


User Guide

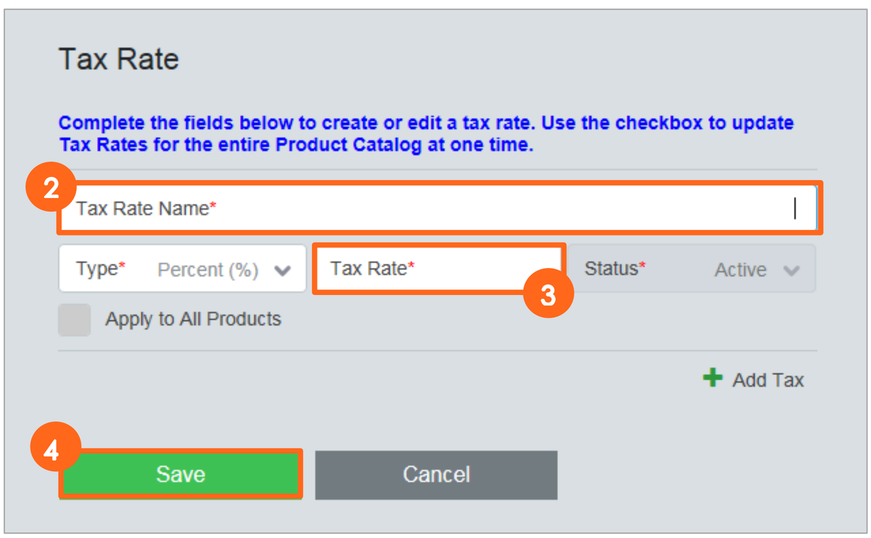
Adding Individual Taxes

To add an individual tax, access the **Tax Rates** page under the **Admin** section of the Main Menu and complete the following steps:

1. Click the **Add Tax** button. This will open the Tax Rate page.



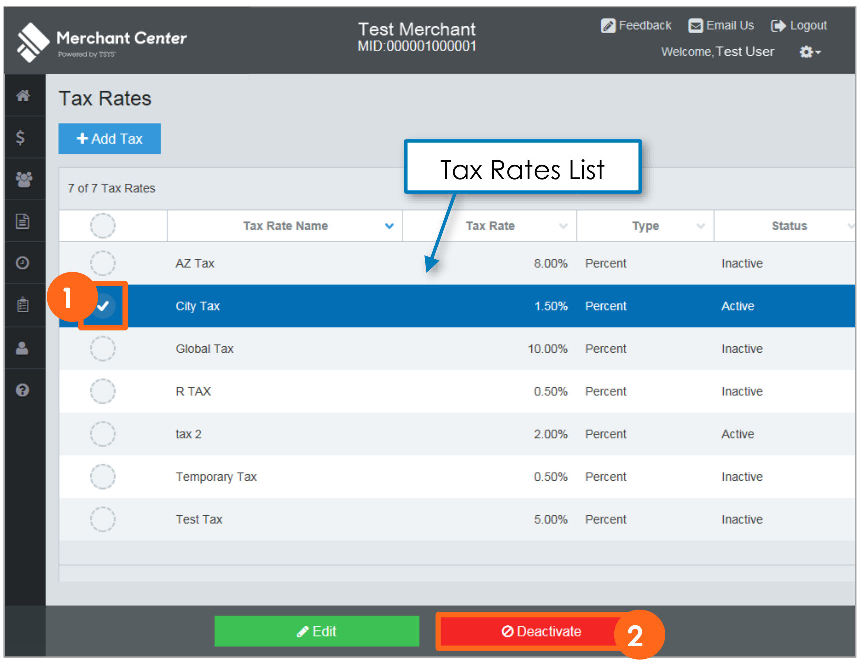
2. Type a name in the **Tax Rate Name** field.
3. Enter the desired tax rate in the **Tax Rate** field.
4. Click **Save**. Your tax rate will now be available to be assigned to a product.



Deactivating Taxes

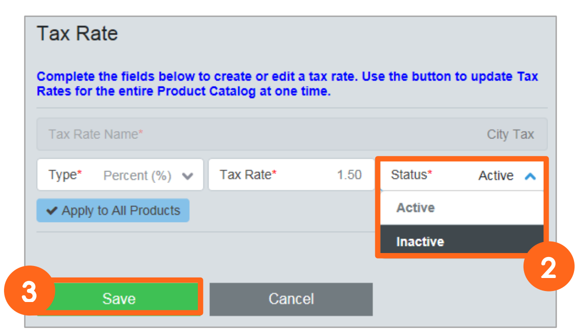
Taxes cannot be deleted in Merchant Center, but you can deactivate them. There are two ways to deactivate taxes. For the first method of deactivating a tax, complete the following steps:

1. From the Tax Rates page, select the checkbox next to the tax you wish to deactivate. This will open a prompt to edit or deactivate the tax.
2. Click the **Deactivate** button to change the status to Inactive.



Alternatively, you can deactivate a tax from the Tax Rate page by completing the following steps:

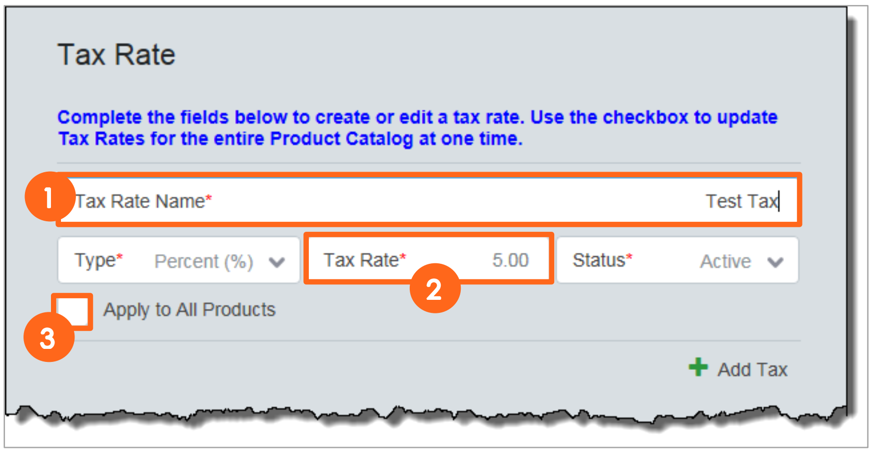
1. Access the Tax Rate page for the tax you wish to deactivate by clicking the **Tax Rate Name** in the Tax Rate List.
2. Select **Inactive** from the **Status** dropdown menu.
3. Click **Save**.



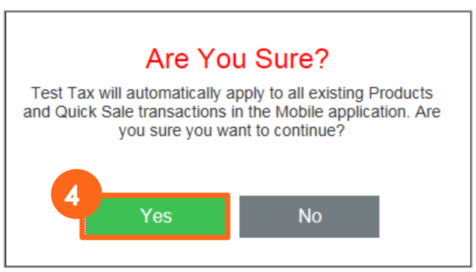
Adding Global Taxes

To add a global tax, access the Tax Rate page as you would for an individual tax and complete the following steps:

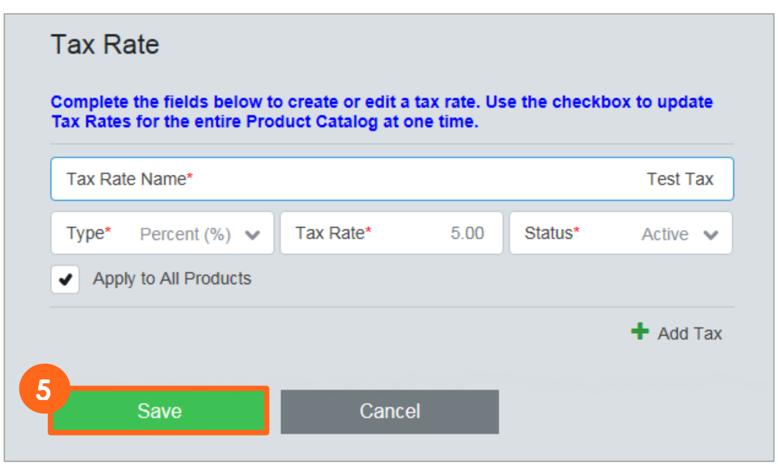
1. Type a name in the **Tax Rate Name** field.
2. Enter the desired tax rate in the **Tax Rate** field.
3. Select the **Apply to All Products** checkbox. This will open a confirmation dialog box.



4. Click **Yes** to confirm your decision.



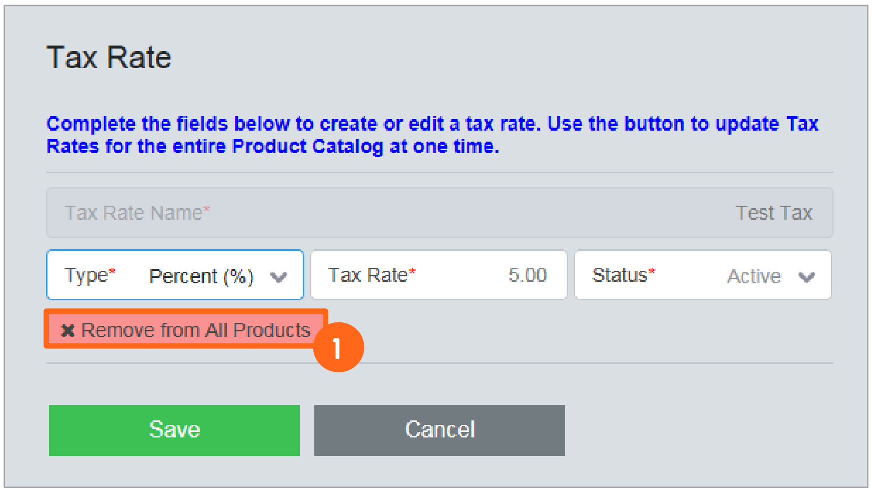
5. Click **Save**. Your tax rate will now be applied to all products in your inventory.



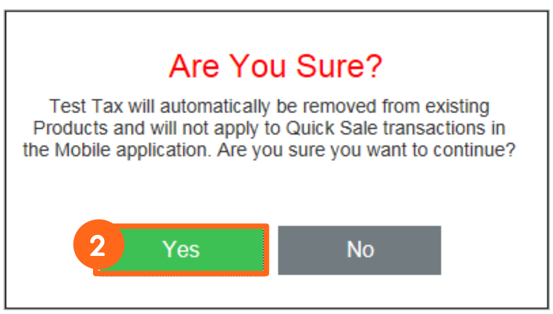
Removing Global Taxes

To remove a global tax from existing products, complete the following steps:

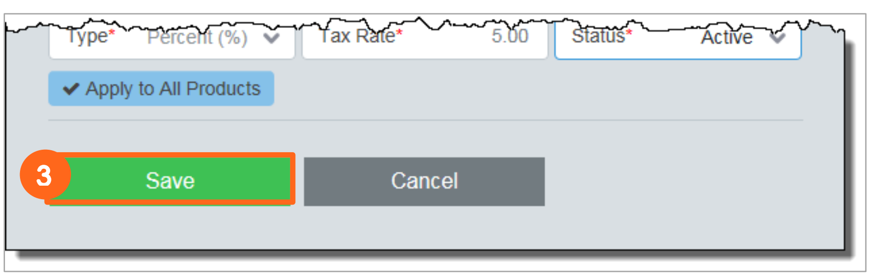
1. From the Tax Rate page for the desired tax, click **Remove from All Products**. This will open a confirmation dialog box.



2. Click **Yes** to confirm your decision.



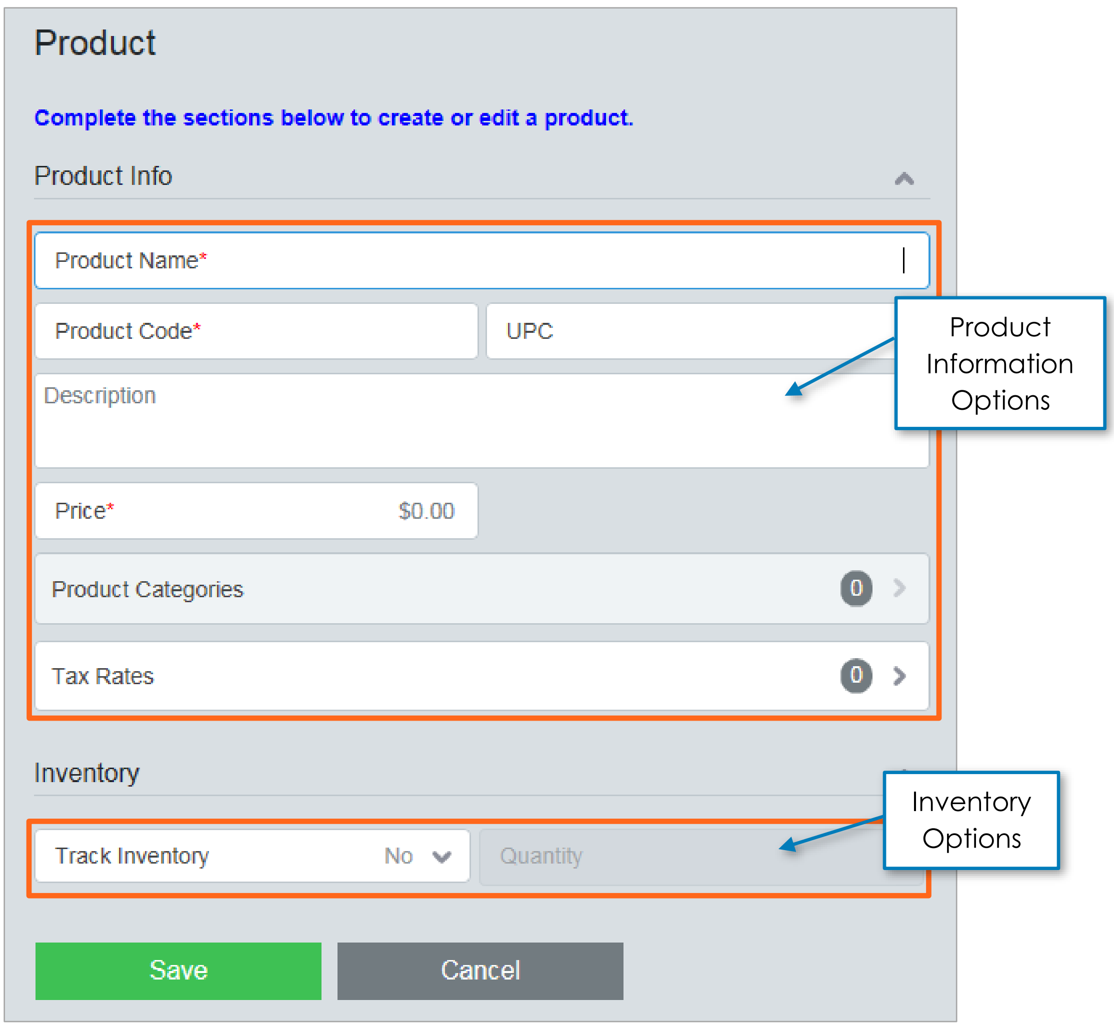
3. Click **Save**. Your tax rate will now be removed from all products in your inventory.
   Note: Removing a global tax will not deactivate it.



Add a New Product

Merchant Center allows you to add as many products as you wish. Creating a new product only requires three pieces of information—**Product Name**, **Product Code**, and **Price**—however, you can also add a description, quantity, and other information. In order to add **Tax Rates** and **Product Categories** to a product, they must already have been created. If you plan on using a barcode scanner, be sure to enter a UPC for all items you wish to scan—if a UPC is not attached to a product, you will not be able to scan it.

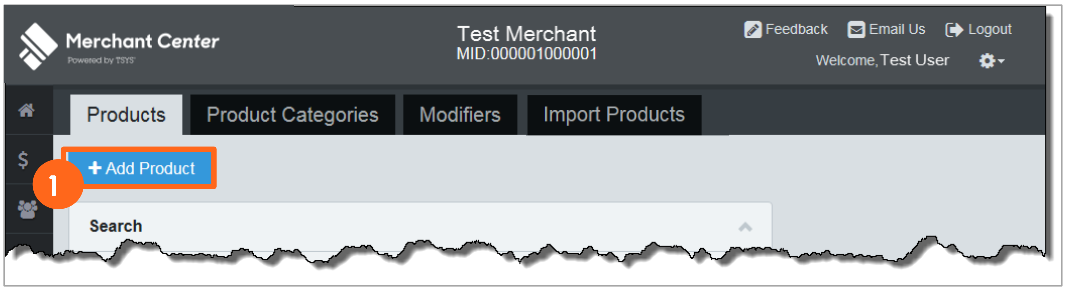
Product Page for a New Product



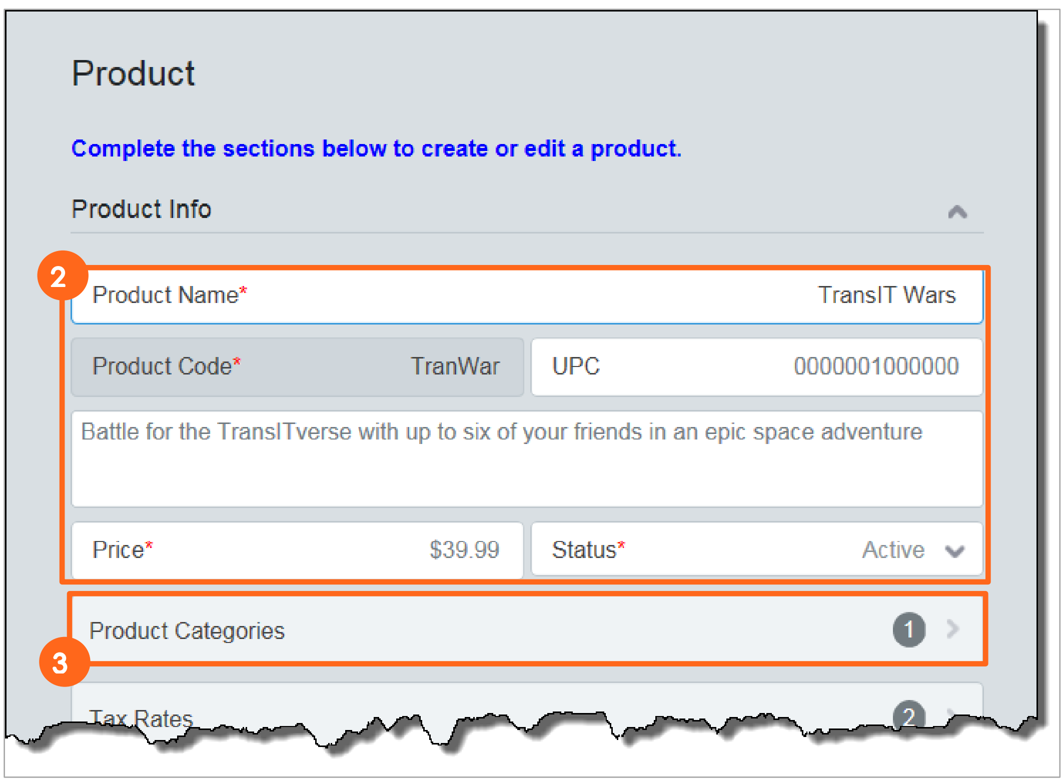
Adding a New Product

To add a new product from the Products page:

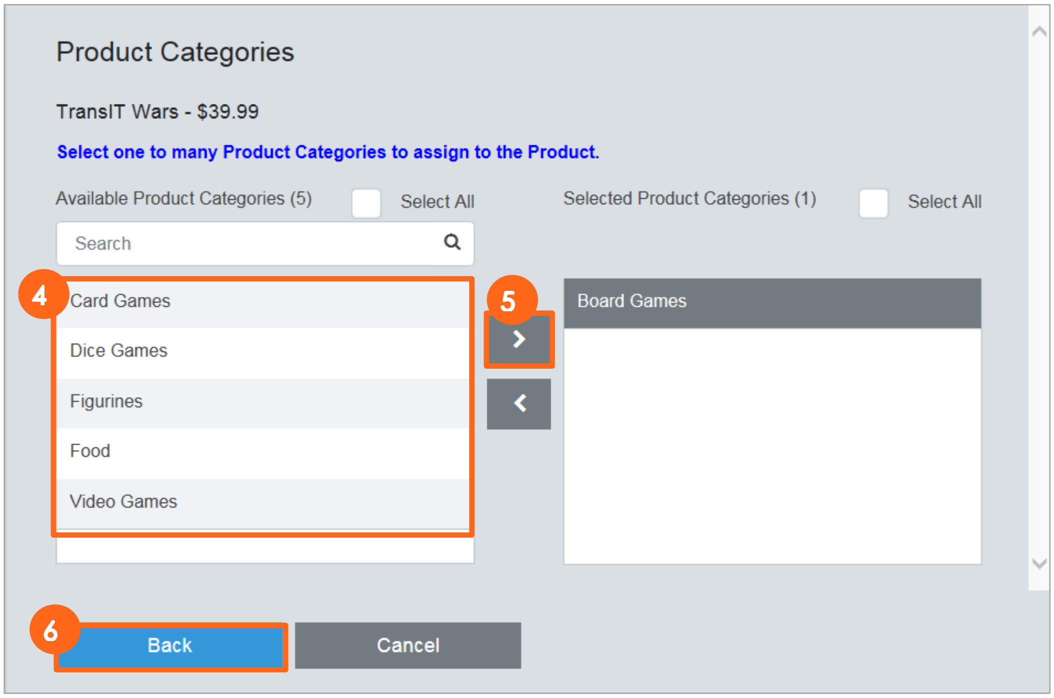
1. Click **Add Product**.



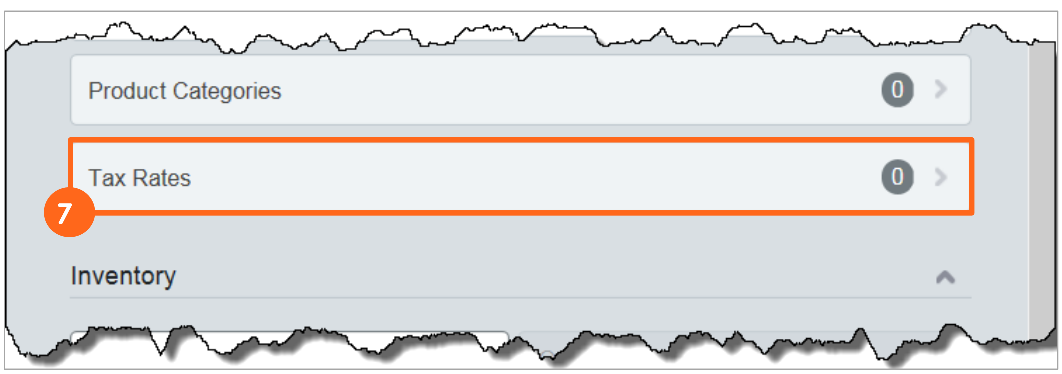
2. Enter the product information in the appropriate fields. At a minimum, you must provide a **Product Name**, a unique **Product Code**, and a **Price**.
3. If you wish to assign one or more categories to this product, click **Product Categories**. This will open the Product Categories page.



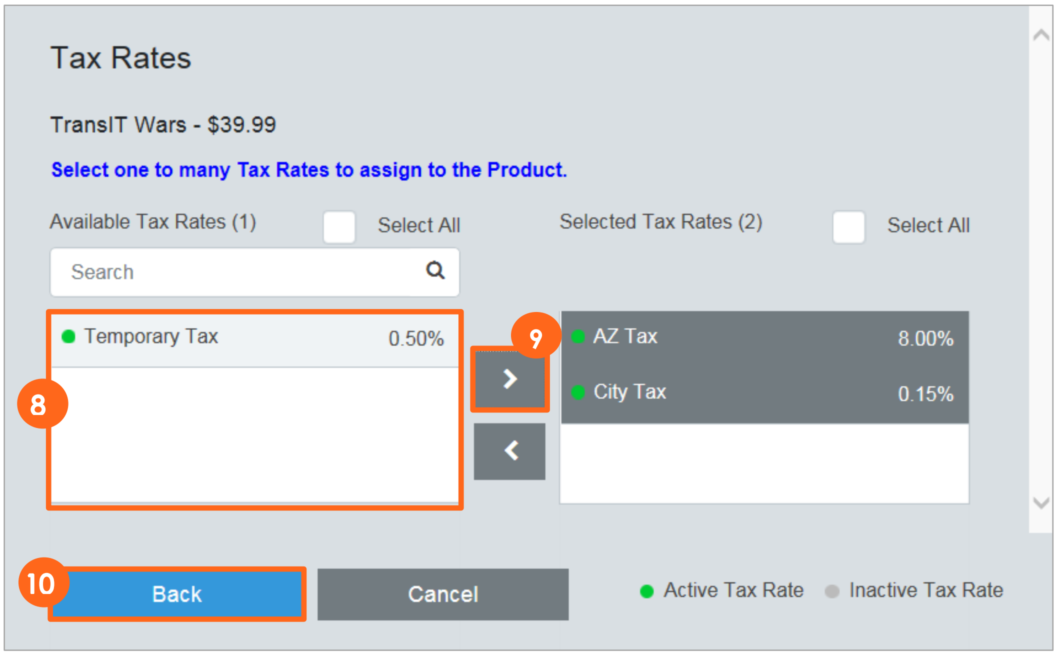
4. Select one or multiple Product Categories from the list of Available Product Categories.
5. Click the **Right Arrow** button to move the selection to the Selected Product Categories list.
6. Click **Back**.



7. If you wish to assign one or more tax rates to this product, click **Tax Rates**. This will open the Tax Rates page.



8. Select one or multiple Tax Rates from the list of Available Tax Rates. **Note**: Only twenty (20) tax rates can be applied to a product at one time, including global taxes.
9. Click the **Right Arrow** button to move the selection to the Selected Tax Rates list.
10. Click **Back**.



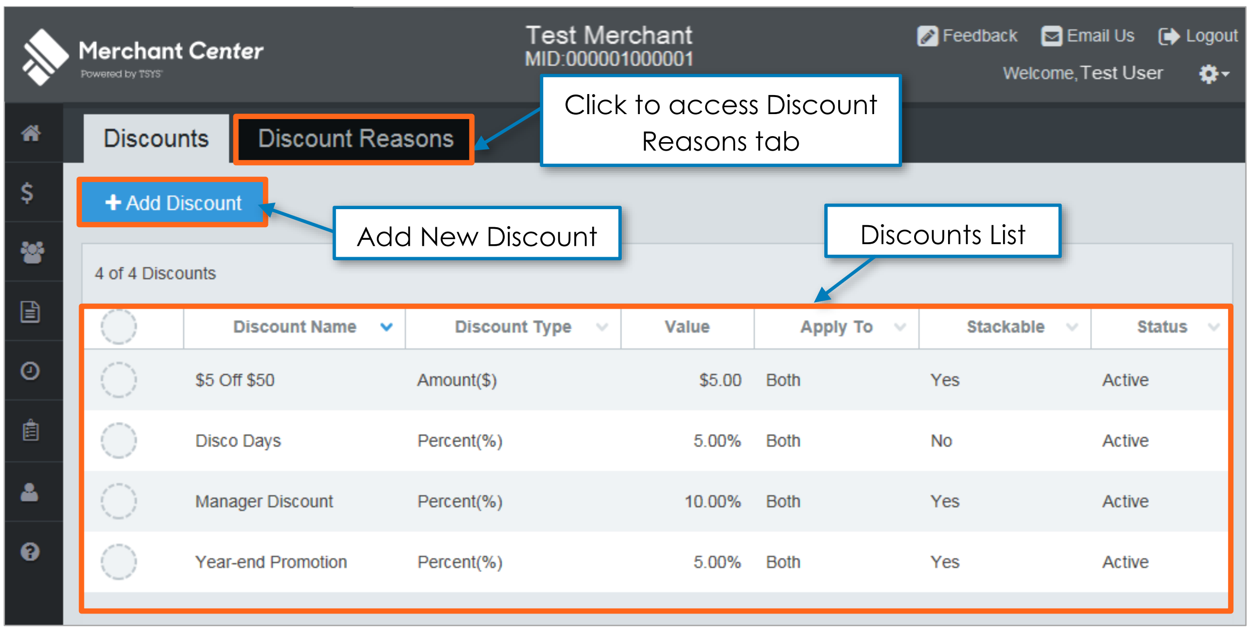
11. If you are tracking inventory for this item, select **Yes** from the Track Inventory dropdown and assign a quantity. **Note**: If you do not wish to track quantity for a product, as would be the case for a service or membership, do not modify the quantity—this will treat the supply of that product as infinite.
12. Click **Save**. Your product will now show in your Product List.

User Guide

Discounts

Merchant Center lets you conveniently manage all of your discounts in one place. Discounts can be for a dollar amount or a percentage, and you can apply them to individual products or to entire transactions in Mobile Payment Acceptance (MPA). For more information on transactions in MPA, see Module 3: Mobile Payment Acceptance. Similar to other product information, you can make discounts active or inactive, but they cannot be deleted. You can create and modify discounts from the Discounts page, which is accessible from the Main Menu.

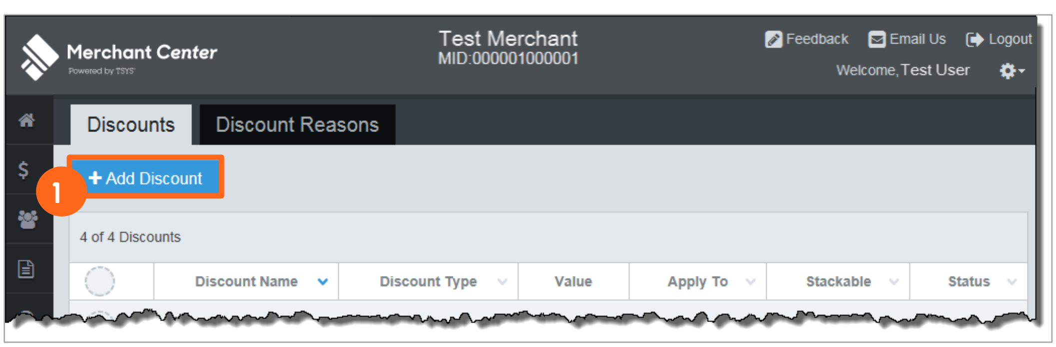
Discounts Page



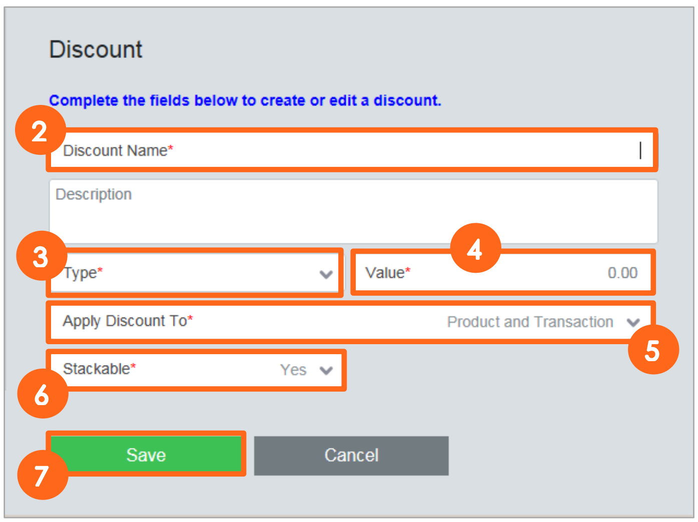
Adding New Discounts

To add a new discount, complete the following steps:

1. From the Discounts page, click **Add Discount**. This will open the Discount page.



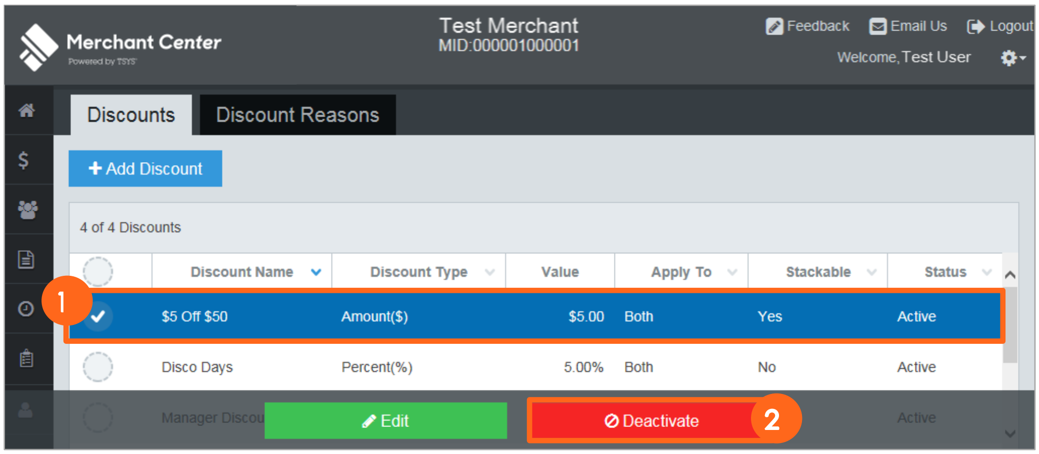
2. Type a discount name in the **Discount Name** field.
3. Select whether you wish your discount to apply as an amount or as a percentage from the **Type** dropdown menu.
4. Type a value in the **Value** field.
5. Select whether you wish the discount to be applicable to products, transactions, or both from the **Apply Discount To** dropdown menu.
6. Select whether you would like the discount to be stackable with other discounts from the **Stackable** menu.
7. Click **Save**.



Deactivating Discounts

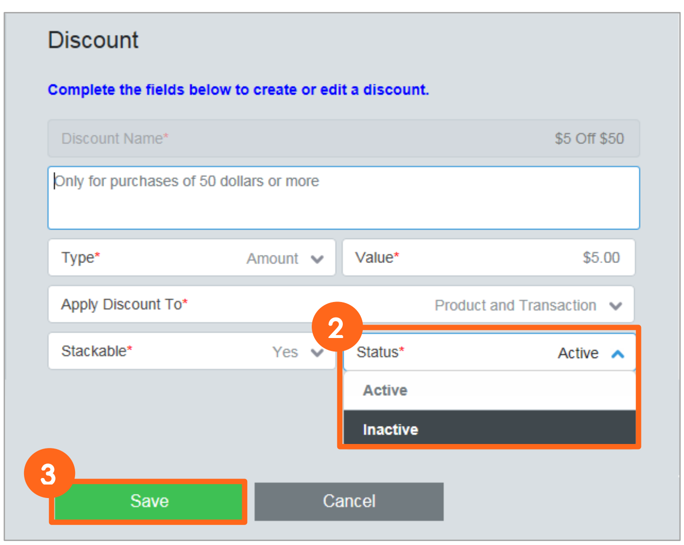
There are times when you may wish for certain discounts to be unavailable (e.g., seasonal discounts, etc.). There are two ways to deactivate discounts and make them unavailable for use in transactions. For the first method of deactivating a discount, complete the following steps:

1. From the Discounts page, select the checkbox next to the discount you wish to deactivate. This will open a prompt to edit or deactivate the discount.
2. Click the **Deactivate** button to change the status to Inactive.



Alternatively, you can deactivate a discount from the Discount page by completing the following steps:

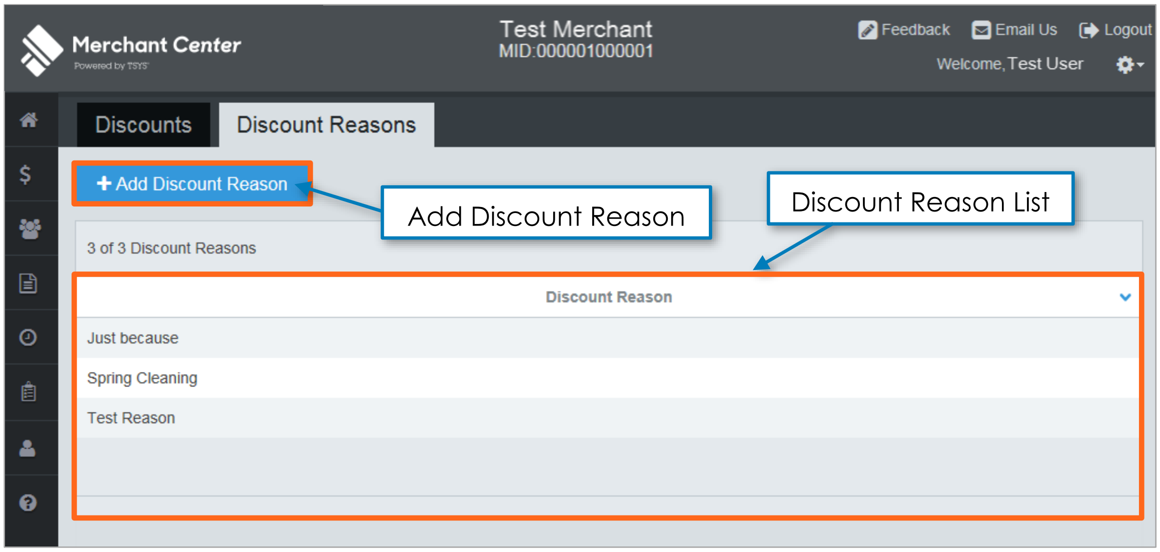
1. Access the Discount page for the discount you wish to deactivate by clicking the **Discount Name** in the Discount List.
2. Select **Inactive** from the **Status** dropdown menu.
3. Click **Save**.



Adding Discount Reasons

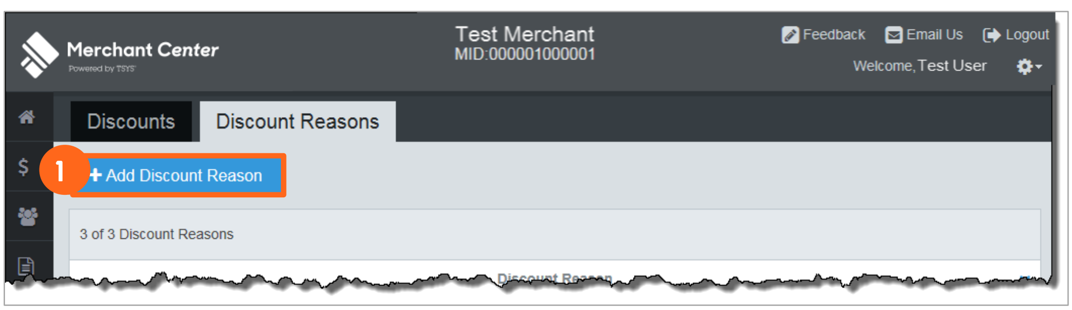
There are times when existing discounts do not provide sufficient flexibility. For this reason, Merchant Center allows you to add discount reasons for use with manual discounts. Discount reasons can be managed from the Discount Reasons tab, which is accessible from the Discounts page.

Discount Reasons Page

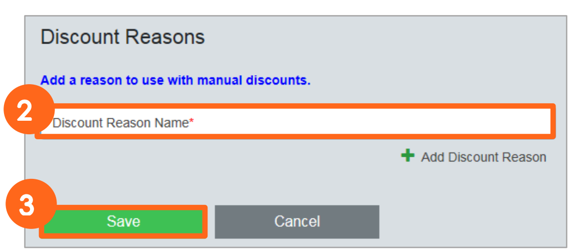


To add a discount reason, complete the following steps:

1. From the Discount Reasons page, click **Add Discount Reason**.



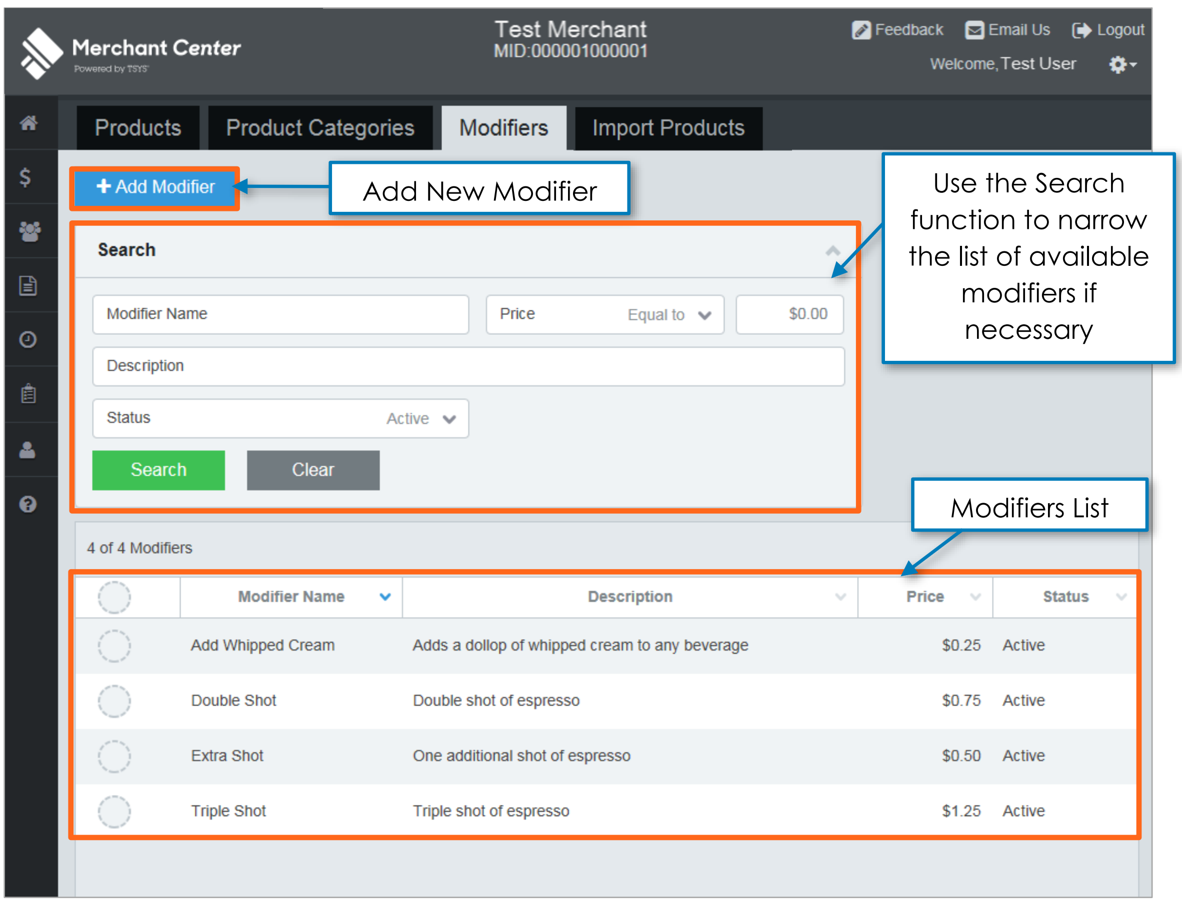
2. Type a discount reason name in the **Discount Reason Name** field.
3. Click **Save**.



Modifiers

Modifiers are product options used to define customizable products. You can assign included modifiers to a product to indicate the standard options included with the price as well as additional modifiers that give the customers extra options, possibly for an extra cost. For example, a latte sold from a local coffee shop might include three shots of espresso in its base price, but the shop could also offer an additional shot for an additional charge. As with other product options, modifiers must be set up before they can be added to a product. You can access the Modifiers page from the Products page, which is accessible from the Main Menu.

Modifiers Page

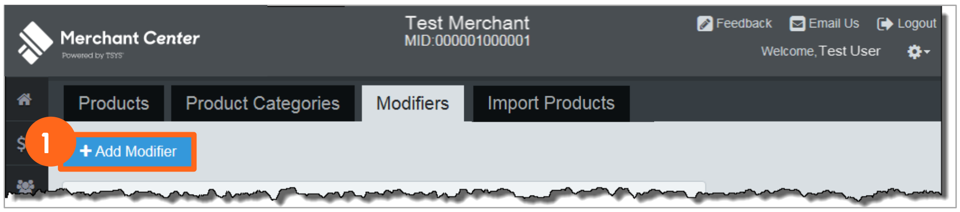


User Guide

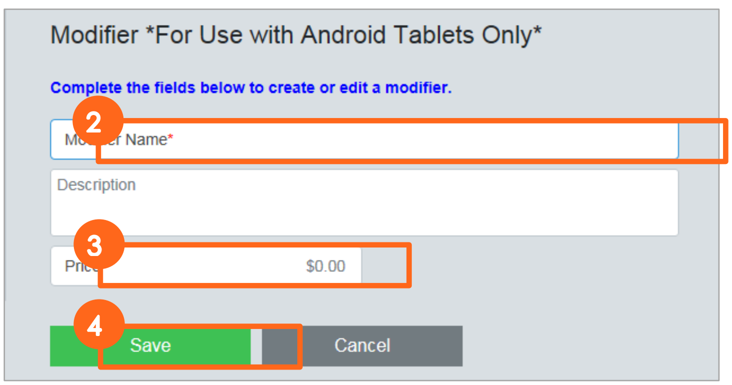
Adding New Modifiers

To add a new modifier, complete the following steps:

1. From the Modifiers page, click **Add Modifier**. This will open the Modifier page.



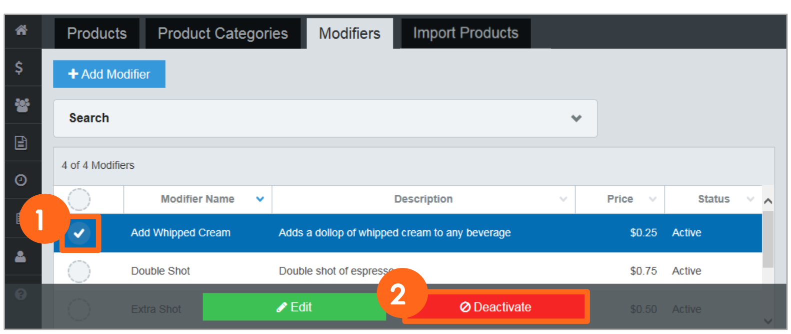
2. Type a name in the **Modifier Name** field.
3. Enter a dollar amount in the **Price** field.
4. Click **Save**. Your modifier can now be added to products in your inventory.



Deactivating Modifiers

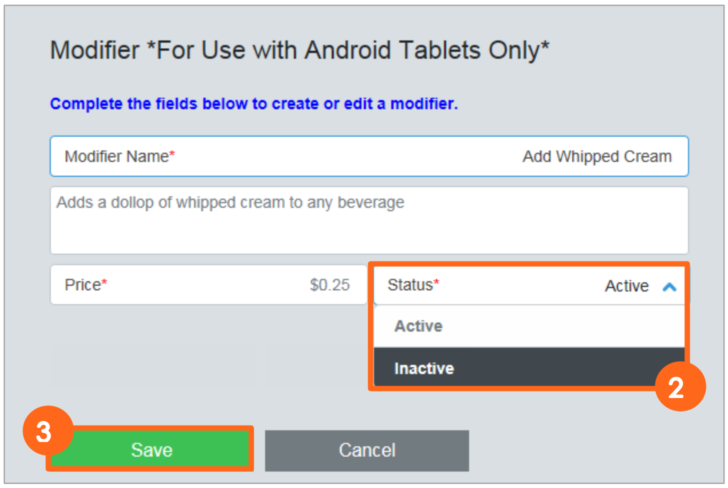
There are two methods to deactivate a modifier. Deactivating a modifier will prevent it from being added to existing products. For the first method of deactivating a modifier, complete the following steps:

1. From the Modifiers page, select the checkbox next to the modifier you wish to deactivate. This will open a prompt to edit or deactivate the modifier.
2. Click **Deactivate**.



Alternatively, you can deactivate a modifier from the Modifier page using the following steps:

1. Access the Modifier page for the modifier you wish to deactivate by clicking the Modifier Name in the Modifier List.
2. Select **Inactive** from the **Status** dropdown menu.
3. Click **Save**.



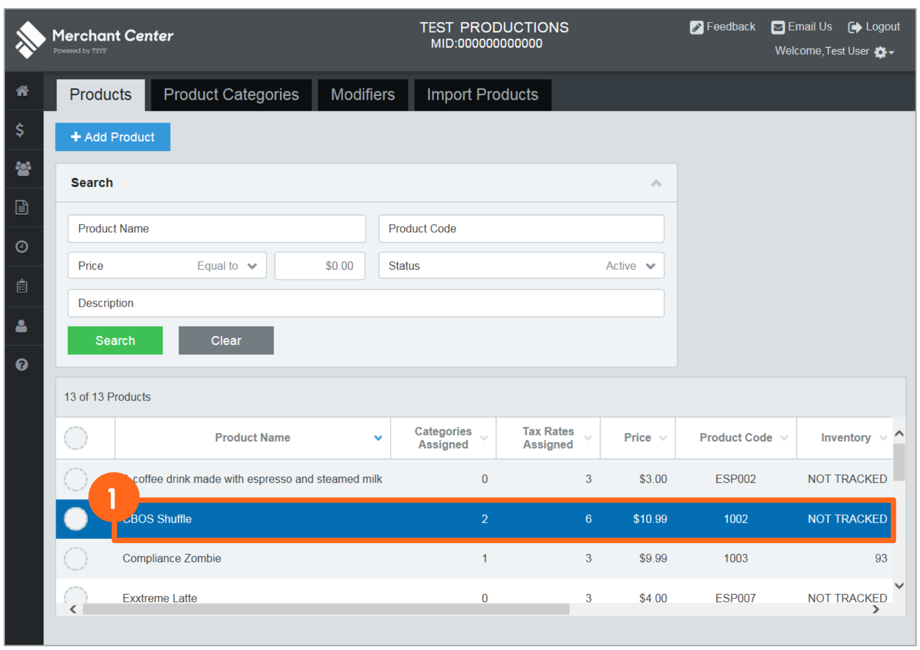
Variations

Variations are product options used to distinguish between single products with multiple offerings. For example, a bookstore might carry several versions of the same book: paperback, hardcover, collector's edition, etc. Each variation can be offered for a different price. Unlike modifiers, variations must be created for each product in the Product Options. You can create up to three variants per product with up to seven values each. Each combination will create a unique variation that can be independently managed. For information on how to add variations to a product, see the following section on Managing Product Options.

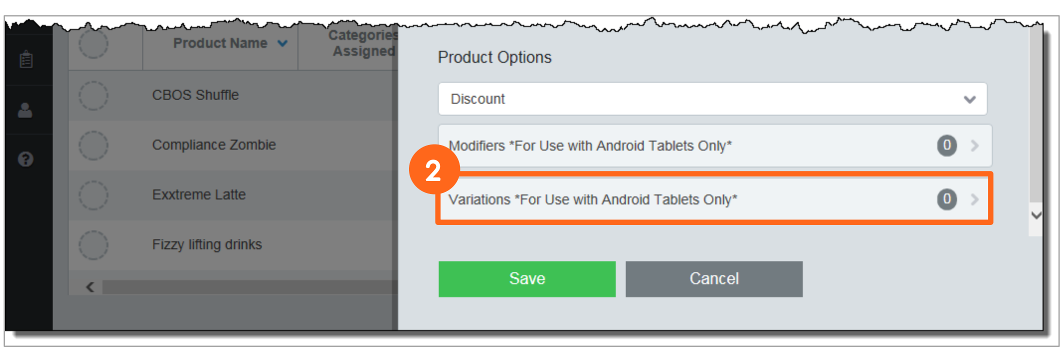
Adding Variations

To add variations to a product, complete the following steps:

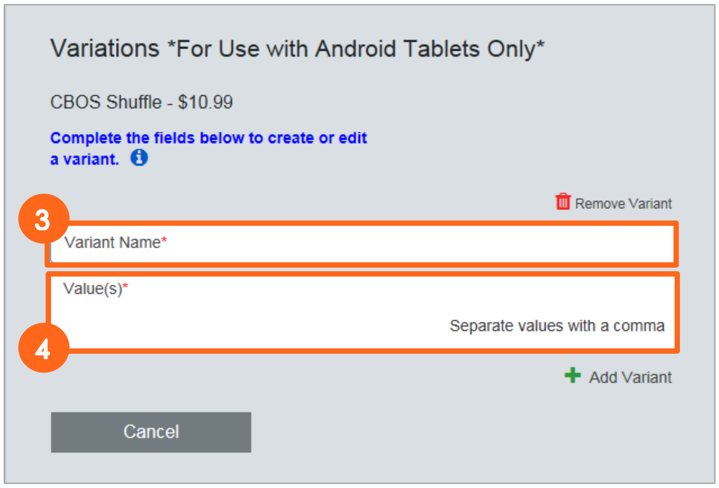
1. Access the product options for the product you wish to modify from the Products page by clicking the **Product Name** in the Product List. This will open the Product page.



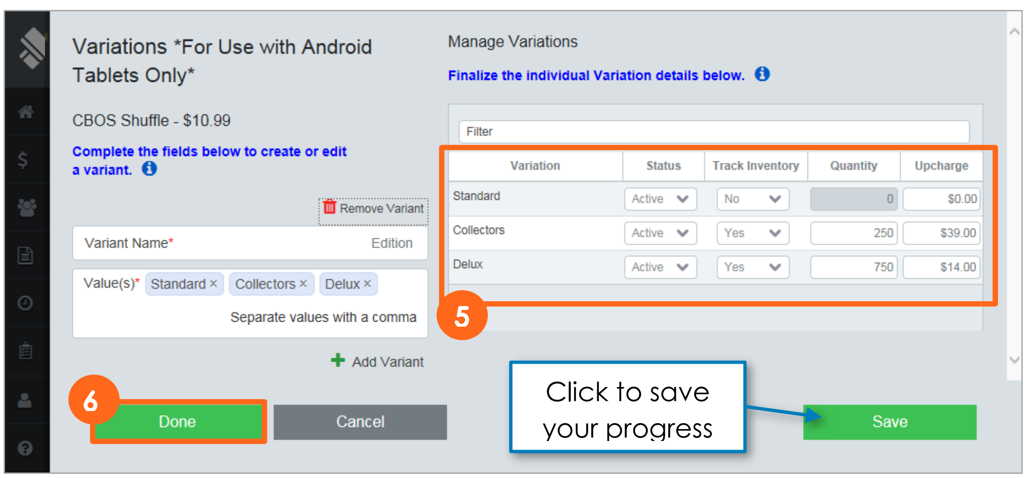
2. Under Product Options, click **Variations**. This will open the Variations page.



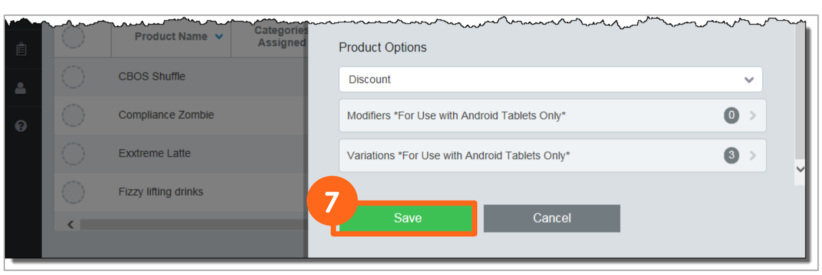
3. Type a name for your variation in the **Variant Name** field.
4. Type one or more names for the values in the **Value(s)** field, separating each value with a comma. After you enter the first value, the Variations page will expand to include the Manage Variations section.



5. Add status, tracking, quantity, and upcharge information for your variations as needed. Click **Save** at any point during this process to save your changes.
6. Click **Done** to return to the Product page.



7. Click **Save** to complete this process.

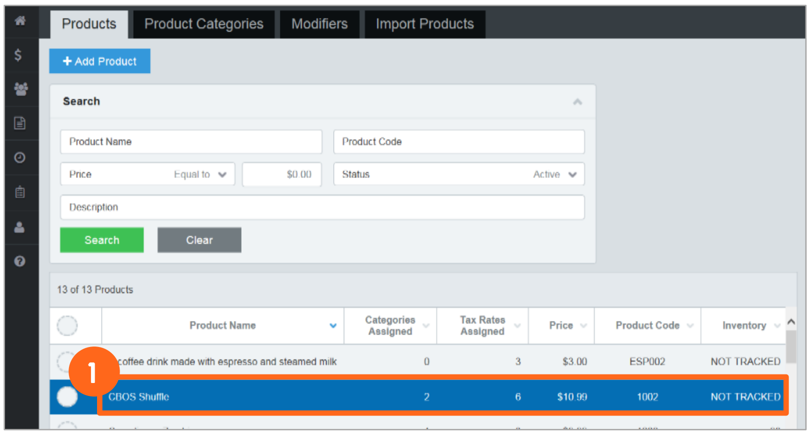


User Guide

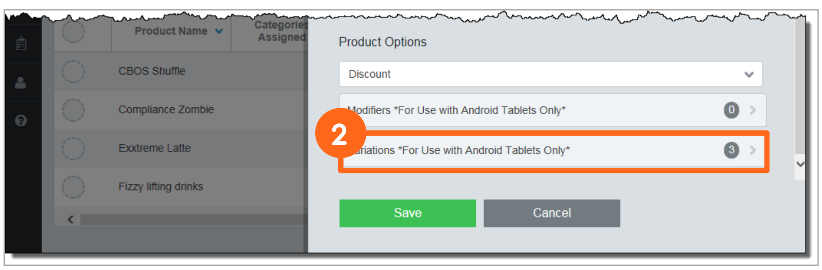
Modifying Variations

To modify variations for a product, complete the following steps:

1. Access the product options for the product you wish to modify from the Products page by clicking the **Product Name** in the Product List. This will open the Product page.

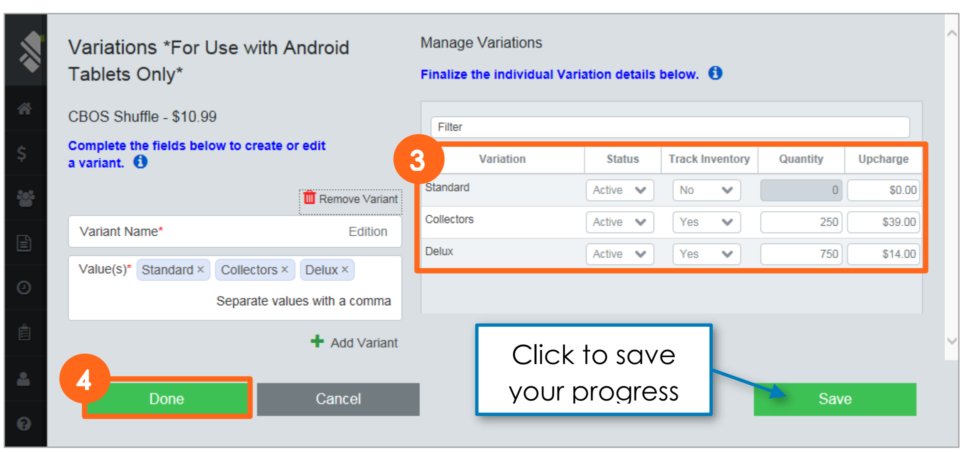


2. Under Product Options, click **Variations**. This will open the Variations page. Note that the Manage Variations section is available because variations already exist for this product.

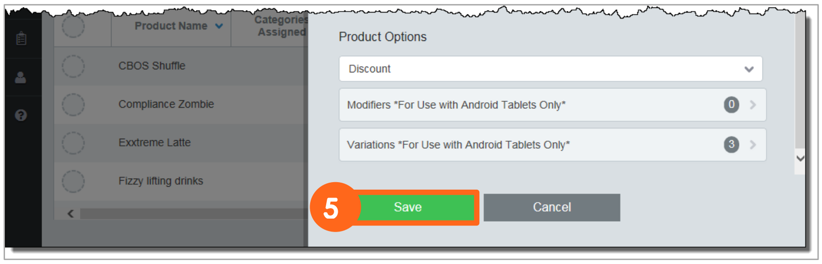


3. Modify status, tracking, quantity, and upcharge information for your variations as needed. Click **Save** at any point during this process to save your changes.

4. Click **Done** to return to the Product page.



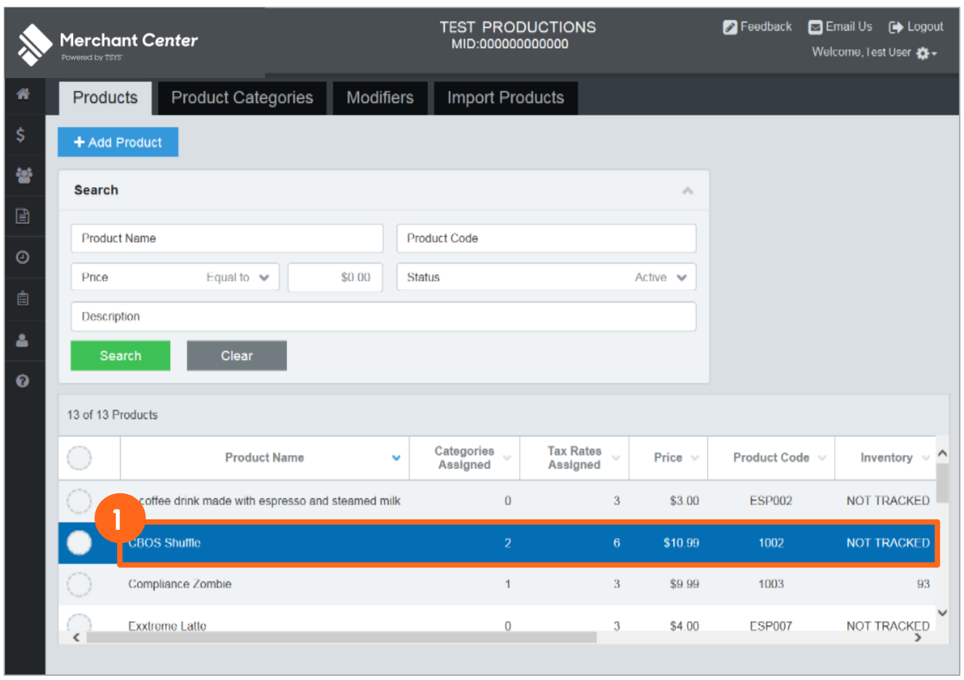
5. Click **Save** to complete this process.



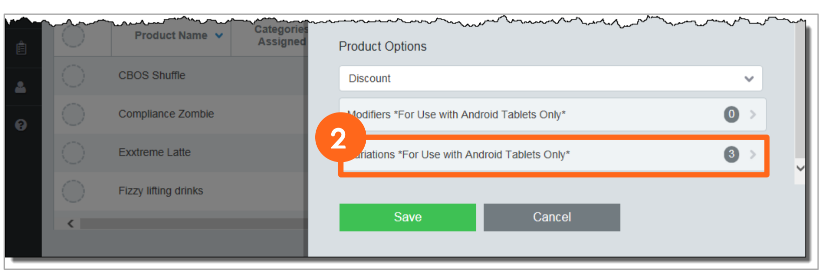
Removing Variations

To remove variations from a product, complete the following steps:

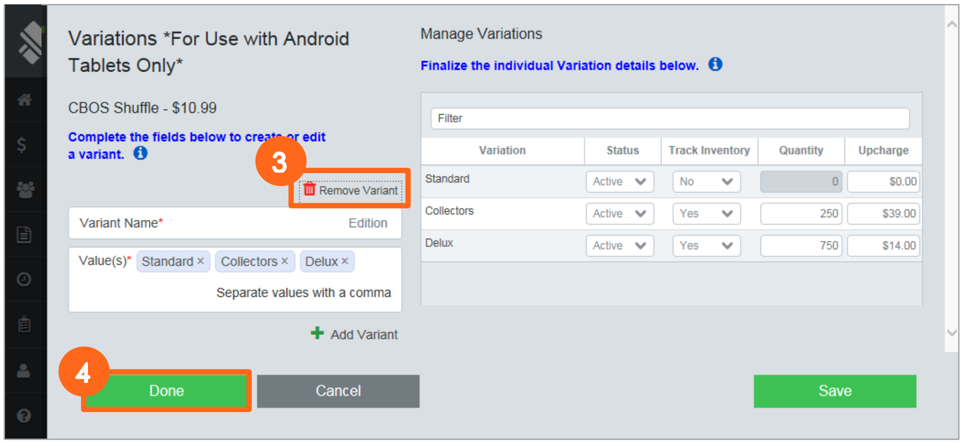
1. Access the product options for the product you wish to modify from the Products page by clicking the **Product Name** in the Product List. This will open the Product page.



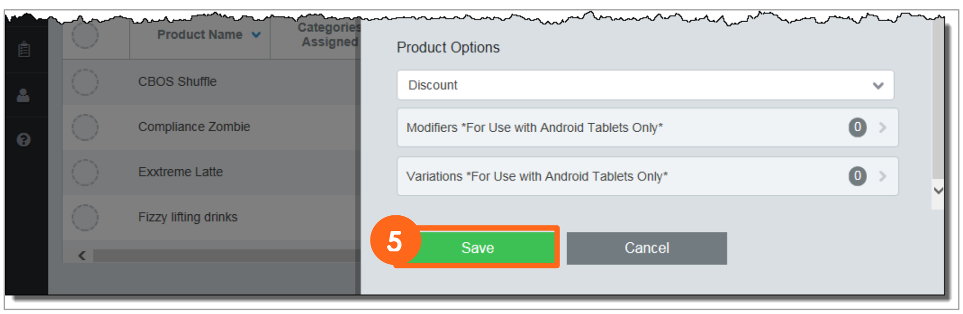
2. Under Product Options, click **Variations**. This will open the Variations page. Note that the Manage Variations section is available because variations already exist for this product.



3. Click the **Remove Variant** icon for any variations you wish to remove. A confirmation dialog box will appear—Click **Yes** to confirm your decision.
4. Click **Done** to return to the Product page.



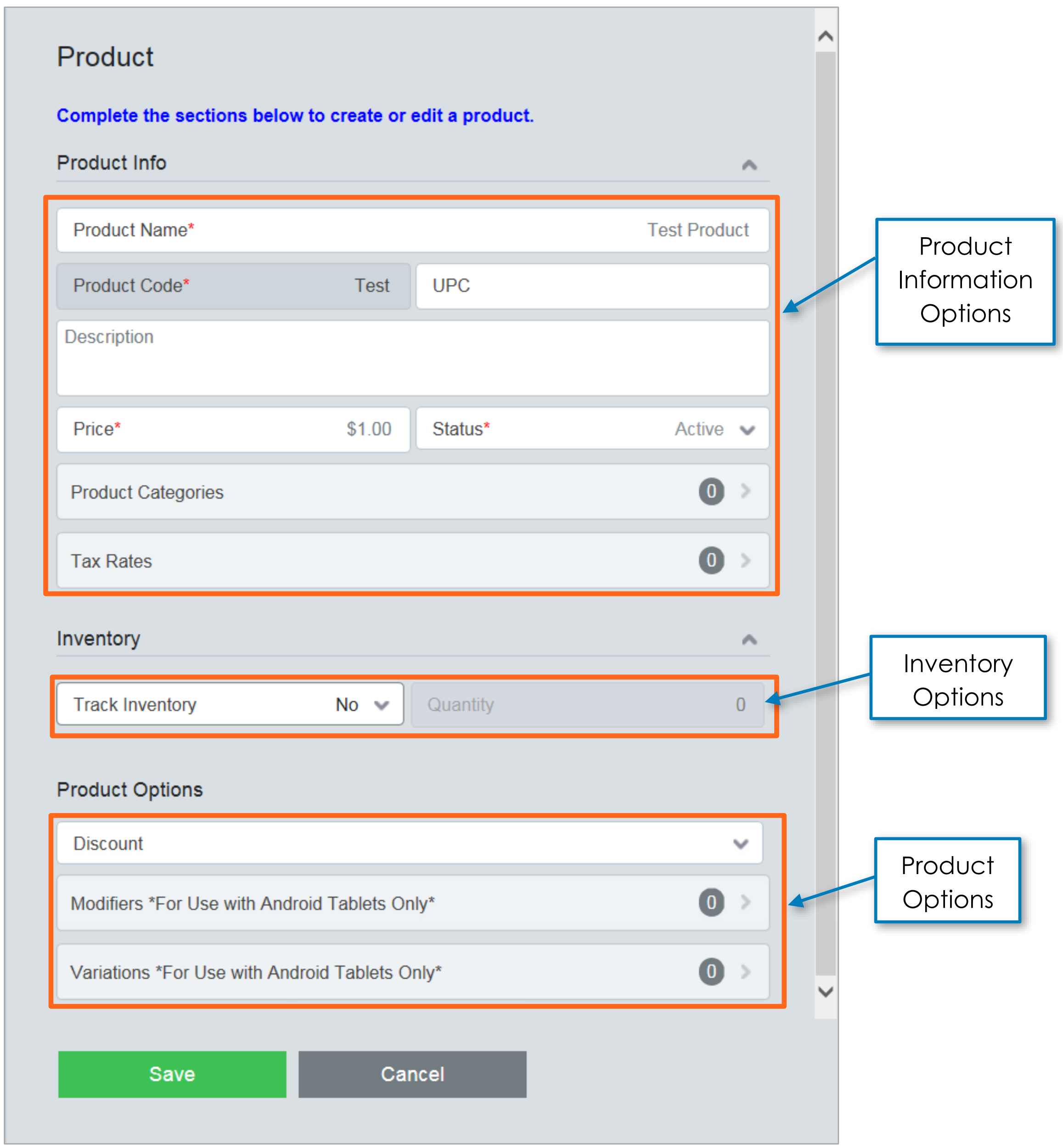
5. Click **Save** to complete this process.



Manage Product Options

Once a product has been added, you will have the option to modify additional options, including **Discount**, **Modifiers**, and **Variations**. If you choose to skip this step, you can access these additional options by clicking the product in the Product List on the Products page. When modifying an existing product, all product information except **Product Code** can be changed as needed. **Note**: Product variations and modifiers can only be created and modified in Merchant Center, but they can only be used during transactions in Mobile Payment Acceptance.

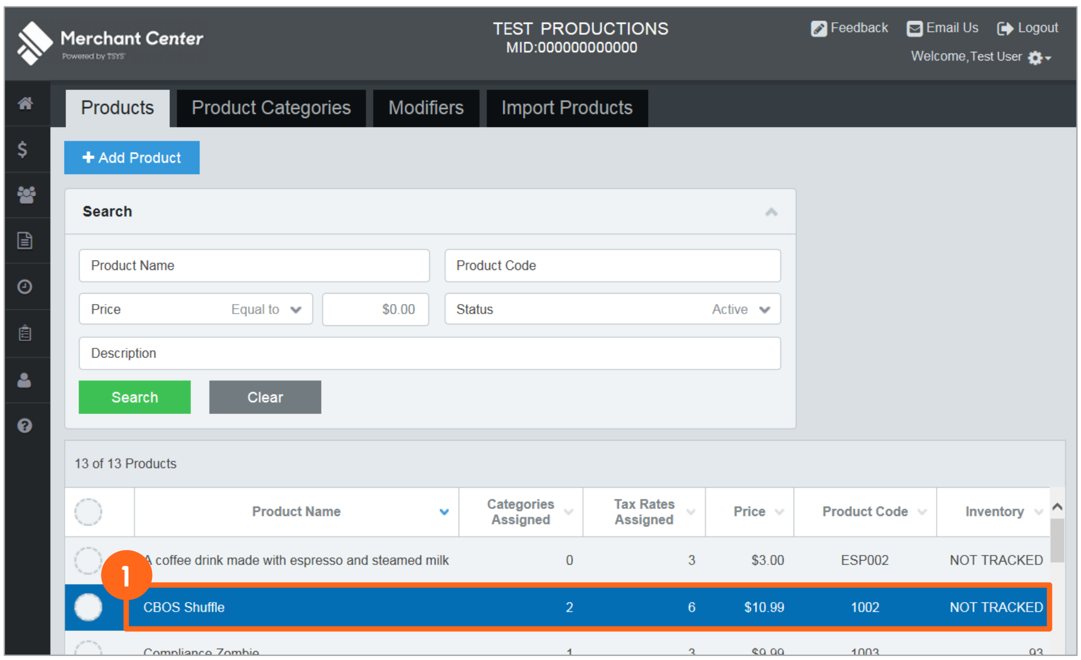
Product Page for an Existing Product



Assigning Discounts in Product Options

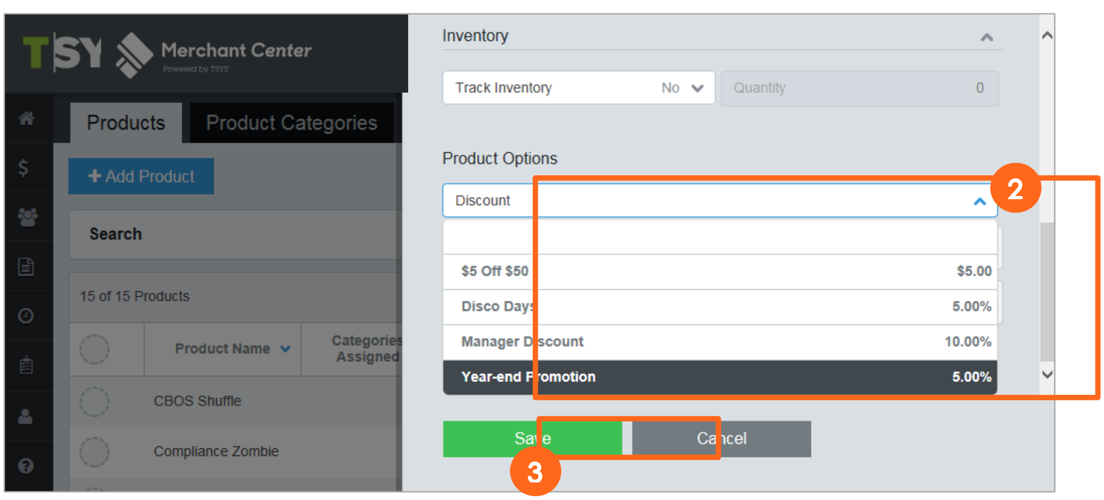
Only one discount can be assigned to a product in the Product Options; however, additional discounts can be added to single products or to an entire order during a transaction. To assign a discount to an individual product in the Product Options, complete the following steps:

1. From the Products page, select the product you wish to manage from the Product List. If necessary, use the **Search** function to narrow the number of available choices.



2. Select the discount you wish to assign from the **Discount** dropdown menu. **Note:** You can only assign discounts that have already been created.

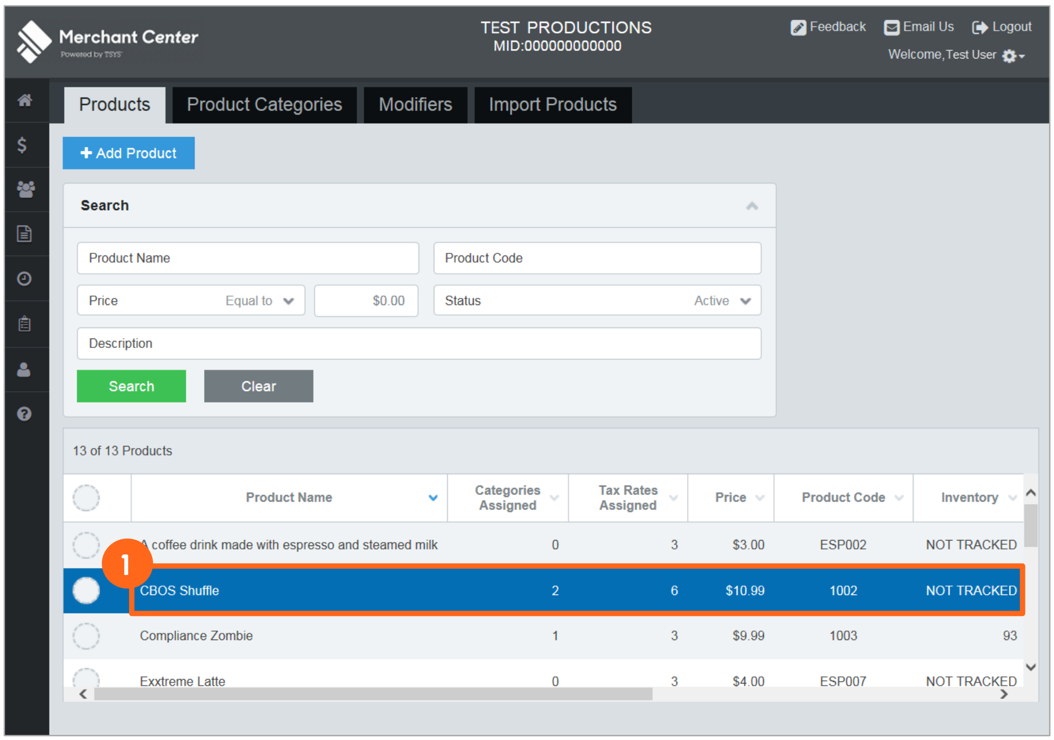
3. Click **Save**. The assigned discount will now automatically be applied when the product is added to an order.



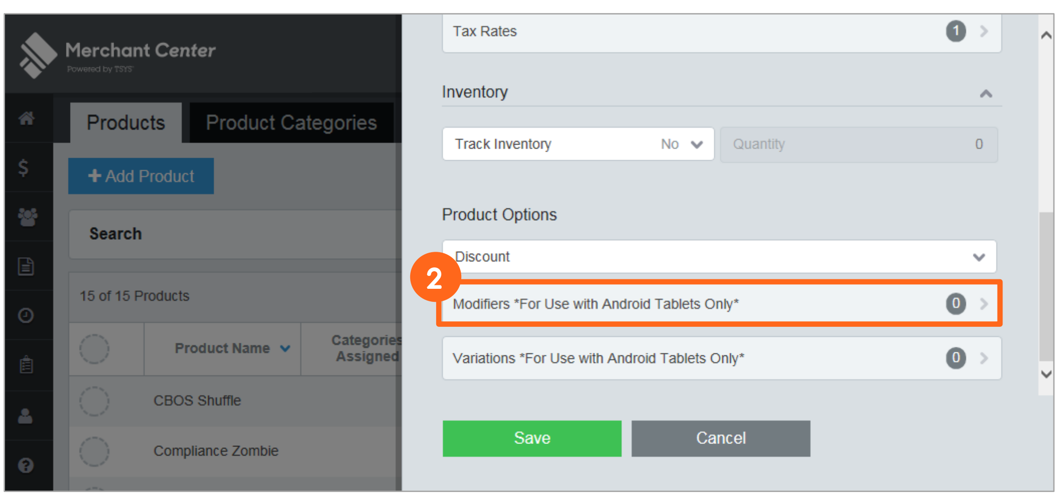
Assigning Modifiers in Product Options

To assign Modifiers to a product in the Product Options, complete the following steps:

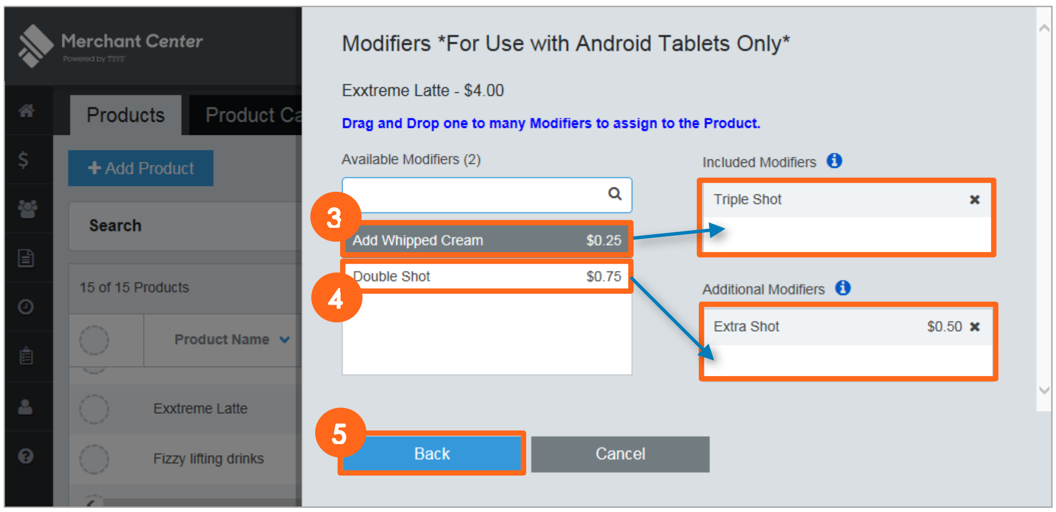
1. From the Products page, select the product you wish to manage from the Product List. If necessary, use the **Search** function to narrow the number of available choices.



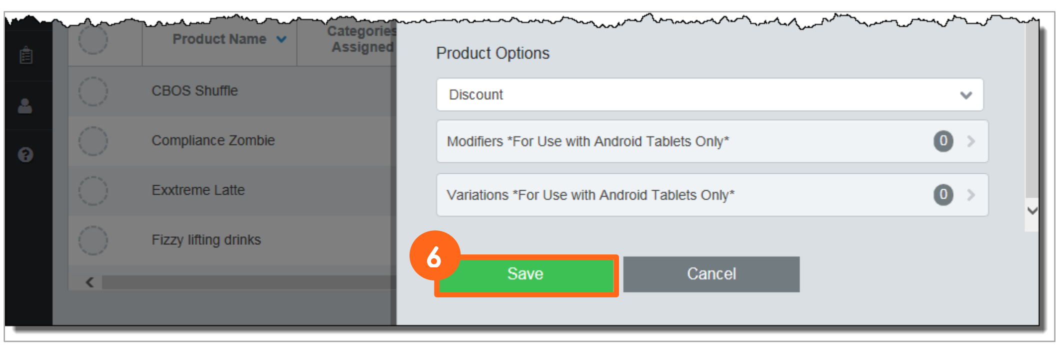
2. Click the **Modifiers** button. This will open the Modifiers page for the chosen product. **Note:** You will only be able to assign modifiers that have already been created in Merchant Center.



3. Click and drag all modifiers you want to include in the base product from the **Available Modifiers** field to the **Included Modifiers** field.
4. Click and drag all modifiers you want to include as add-ons from the **Available Modifiers** field to the **Additional Modifiers** field.
5. Click **Back** to return to the Product page.



6. Click **Save** to complete this process. The assigned modifiers will be available when the product is added to an order.



User Guide

Importing Products

If you prefer to upload multiple products at once rather than entering them individually, you can access the Import Products tab from the Products screen. From here, you can download a template file and enter the product data as needed. When you have finished entering products into the template, you can upload the file to Merchant Center. Detailed instructions for importing products are available using the Import Product Instructions link on the screen.

Import Products Page