



User Guide

Mobile Payment Acceptance User Guide



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Table of Contents

Introduction	4
Account Activation and Login.....	5
Activate Your Account	5
PIN Entry.....	17
Login to Your Account	18
The Main Menu	20
Manage Settings	22
View Account Information	30
Help	31
Products, Categories, Discounts and Customers	32
Viewing Products	32
Add a Product	33
Remove a Product	35
Categories	40
Discounts	44
Manage Customer Information.....	50
Add New Customer	51
Remove Customer Information	58
Transactions	61
Add a Customer to a Transaction.....	62
Begin a Transaction	63
Discounts	73
Processing a Payment	80
Tips and Signature	88
Approved Transaction.....	89

Table of Contents

Declined Transaction.....	90
Forced Authorizations.....	92
Partial Authorizations	95
Open Orders.....	97
Returns/Reversal/Void.....	102
History	104
Transaction History.....	104
Process a Return from the Transaction History	108
Back Office/Merchant Center.....	117
Log Into Merchant Center.....	117
Creating User Profiles in Merchant Center	119
Creating and Managing Products In Merchant Center	122
Product Categories.....	123
Tax Rates	125
Add a New Product.....	130
Discounts	134
Modifiers	138
Variations	141
Manage Product Options.....	146
Importing Products	150

User Guide

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.

User Guide

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.

User Guide

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.



User Guide

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.




CALL SUPPORT

First, please check your e-mail SPAM folder.

If not found, please contact TSYS Support to request your **"Welcome to PASS World"** e-mail.

 **(800) 654 - 9256**



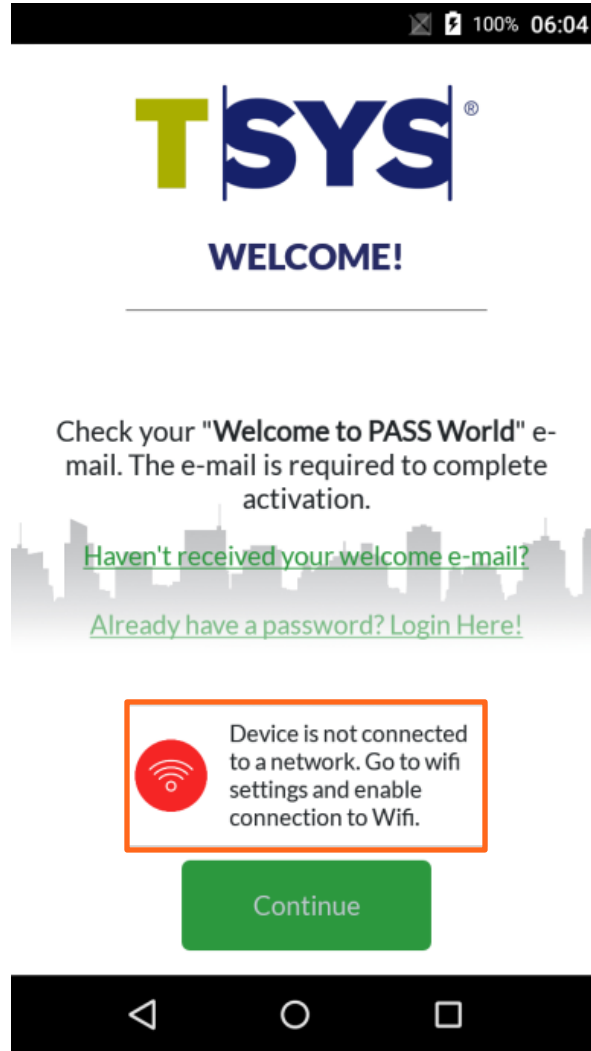
Back

User Guide

Not connected to the internet?

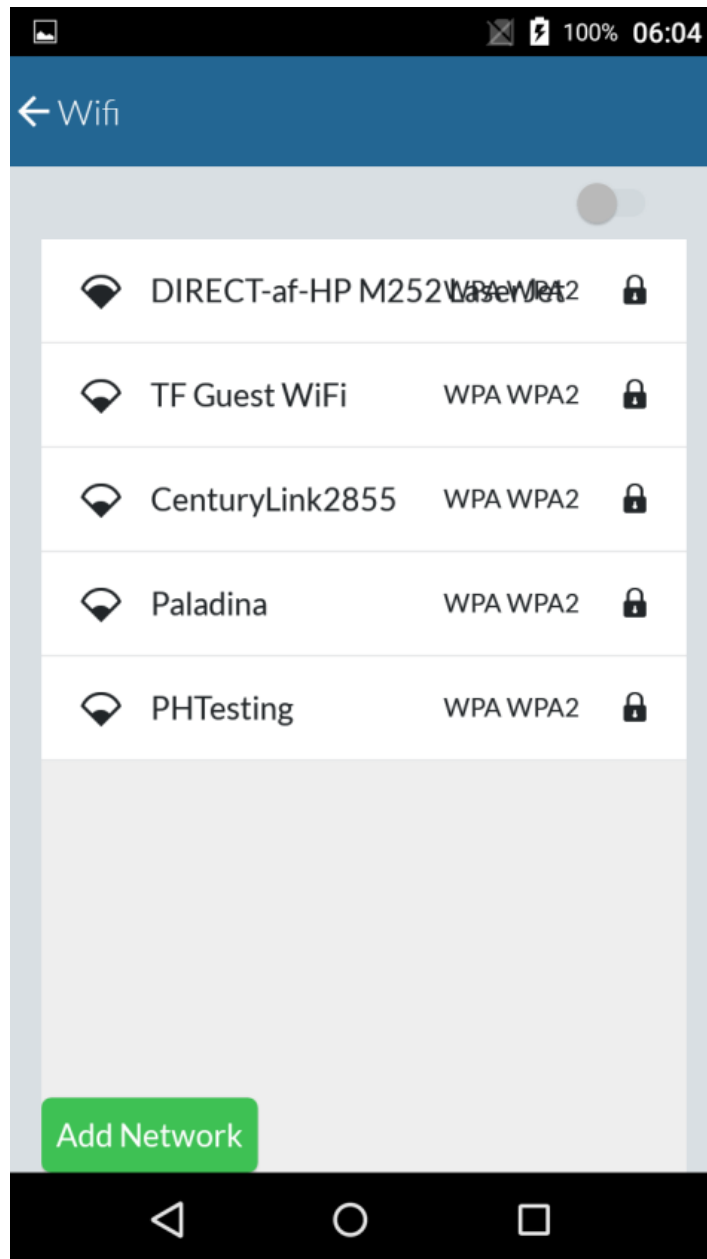
If the device is not connected to the internet:

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



User Guide

2. Connect to your Wi-Fi network.



User Guide

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.

User Guide

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

The screenshot shows the TSYS Account Activation screen. At the top, the status bar displays icons for camera, flash, location, and connectivity, along with 67% battery and 01:00 time. The app header is blue with 'TSYS' in white. The main content area is titled 'Account Activation' and includes a warning icon and text: 'Complete the fields below to activate your account.' Below this, there are five numbered callouts: 1. Points to the 'Email' field with the placeholder 'Enter Email ID'. 2. Points to the 'Device ID' field with the placeholder '000000000000' and a 'Last 2' label. 3. Points to the 'Create Password' section, which includes 'Enter New Password' and 'Confirm Password' fields with the placeholder 'Re-Enter New Password'. 4. Points to the 'I agree to the Terms and Conditions' toggle switch, which is currently off. 5. Points to the green 'Next' button. A 'Cancel' button is also visible. At the bottom, there is a black navigation bar with standard Android icons.

TSYS

Account Activation

! Complete the fields below to activate your account.

1 Email
Enter Email ID

2 Device ID
000000000000 Last 2

3 Create Password
Enter New Password
Confirm Password
Re-Enter New Password

Device ID is the 12-character Merchant ID assigned to you while signing on with your bank or agent, plus two digits that designate which device you are using.

4 I agree to the [Terms and Conditions](#)

5 Next

Cancel

User Guide

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

The screenshot shows a mobile app interface for activating an account. At the top, the status bar displays 'AT&T' and various icons. Below it, a blue header bar contains the word 'Activate'. The main content area is white and contains a list of four security questions, each followed by a 'Security Answer' input field. The questions are: 'What is the last name of your favorite mentor or teacher?', 'What was your dream job as a child?', 'In what city did your mother and father meet?', and 'What is the first musical instrument you learned to play?'. A red circle with the number '6' is next to the first question, and a red circle with the number '7' is next to the first 'Security Answer' field. At the bottom, a green button labeled 'Next' is highlighted with a red circle and the number '8'. The bottom of the screen shows a standard Android navigation bar with icons for back, home, and recent apps.

AT&T 95% 3:18 PM

Activate

! Complete the fields below to activate your account.

6

What is the last name of your favorite mentor or teacher?

Security Answer 7

What was your dream job as a child?

Security Answer

In what city did your mother and father meet?

Security Answer

What is the first musical instrument you learned to play?

Security Answer

8 Next

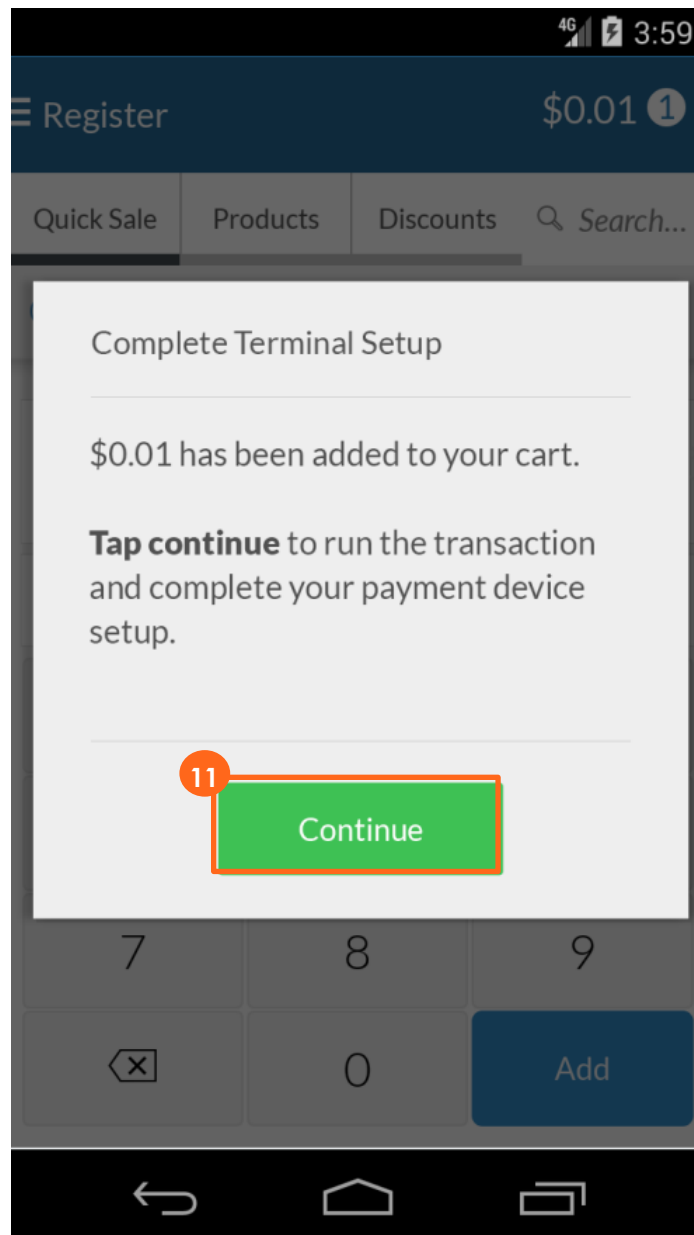
User Guide

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**.

The screenshot shows a mobile application interface for creating a PIN. At the top, there is a status bar with '4G', a battery icon, and the time '2:08'. Below the status bar, the text reads: 'You can accept payments faster by using this PIN, no need to enter your entire username and password.' followed by 'Accept payments faster using a PIN. No need to enter your username and password.' in a smaller font. The main content area is divided into two sections: 'Create PIN' and 'Confirm PIN'. Each section has four empty boxes for entering digits. Below these sections is a numeric keypad with digits 1 through 9, 0, and a backspace button (X). A blue 'Next' button is located at the bottom right of the screen. An orange circle with the number 9 is positioned to the left of the 'Create PIN' section, and an orange circle with the number 10 is positioned to the right of the 'Next' button.

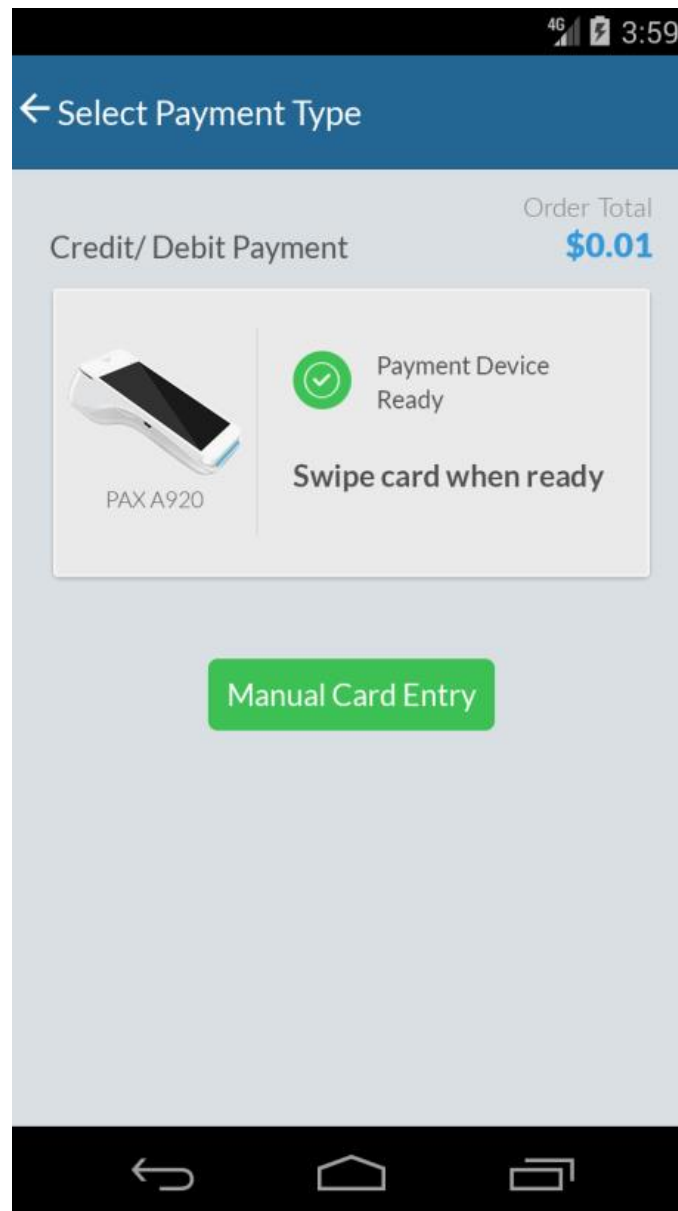
User Guide

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



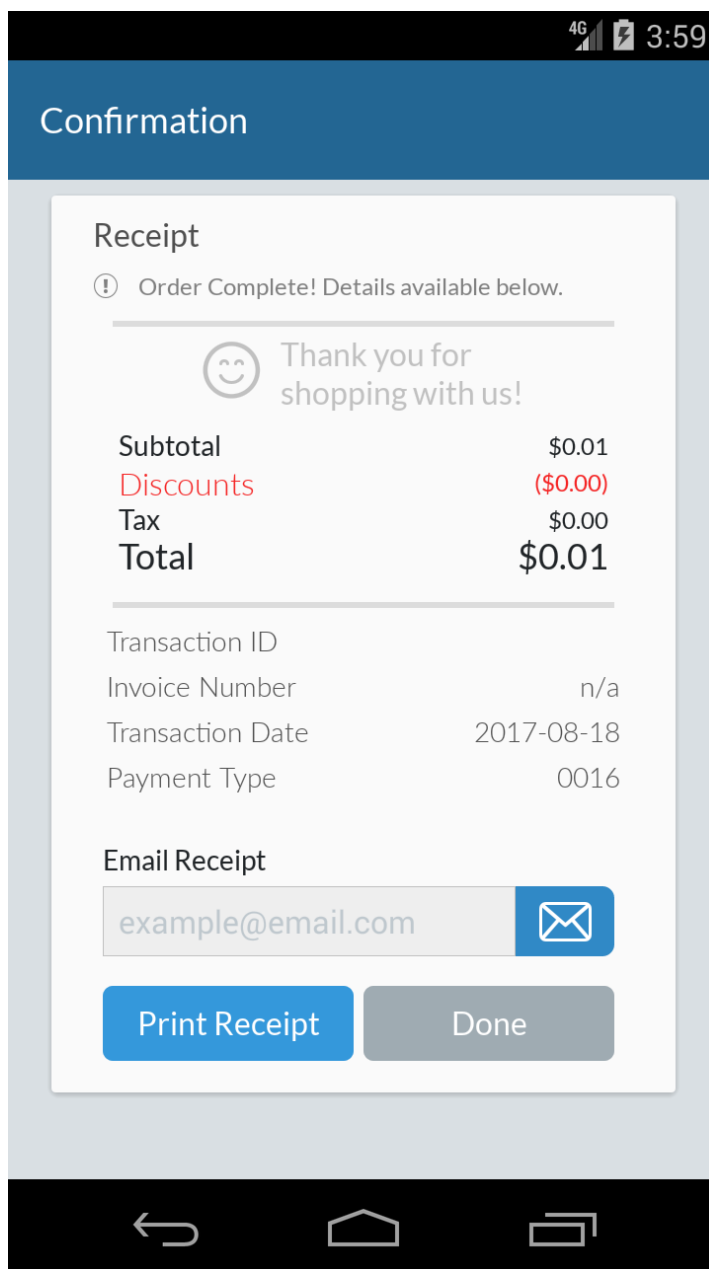
User Guide

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



User Guide

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



The image shows a mobile application interface for a confirmation screen. At the top, a status bar displays '4G', signal strength, battery level, and the time '3:59'. Below this is a blue header with the word 'Confirmation'. The main content area is a white card with a light gray border. It starts with the title 'Receipt' and a message: 'Order Complete! Details available below.' followed by a smiley face icon and the text 'Thank you for shopping with us!'. A table of transaction details follows: Subtotal (\$0.01), Discounts (\$0.00), Tax (\$0.00), and Total (\$0.01). Below the table, transaction details are listed: Transaction ID, Invoice Number (n/a), Transaction Date (2017-08-18), and Payment Type (0016). An 'Email Receipt' section contains an email input field with 'example@email.com' and an envelope icon. At the bottom of the card are two buttons: 'Print Receipt' (blue) and 'Done' (gray). The mobile OS navigation bar at the very bottom shows back, home, and recent apps icons.

4G 3:59

Confirmation

Receipt

Order Complete! Details available below.

Thank you for shopping with us!

Subtotal	\$0.01
Discounts	(\$0.00)
Tax	\$0.00
Total	\$0.01

Transaction ID

Invoice Number n/a

Transaction Date 2017-08-18

Payment Type 0016

Email Receipt

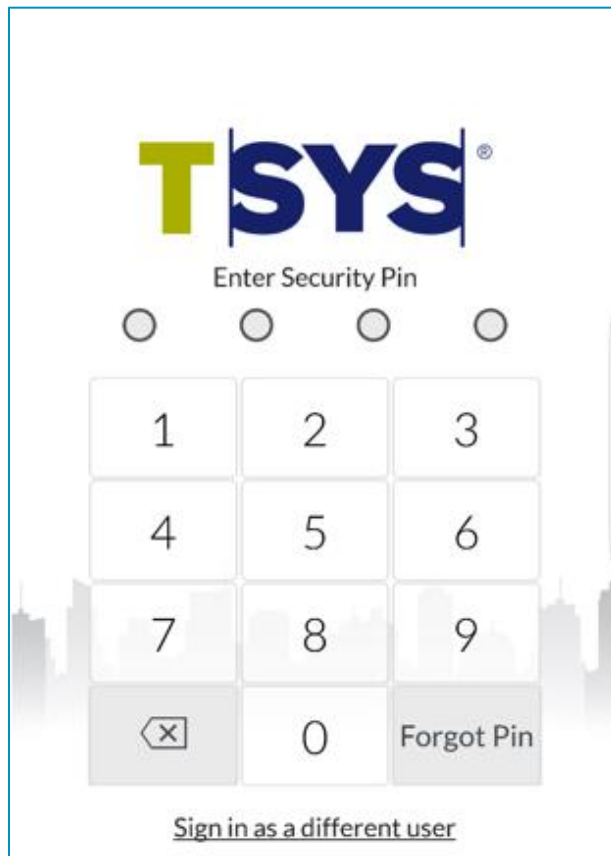
example@email.com

Print Receipt Done

User Guide

PIN Entry

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

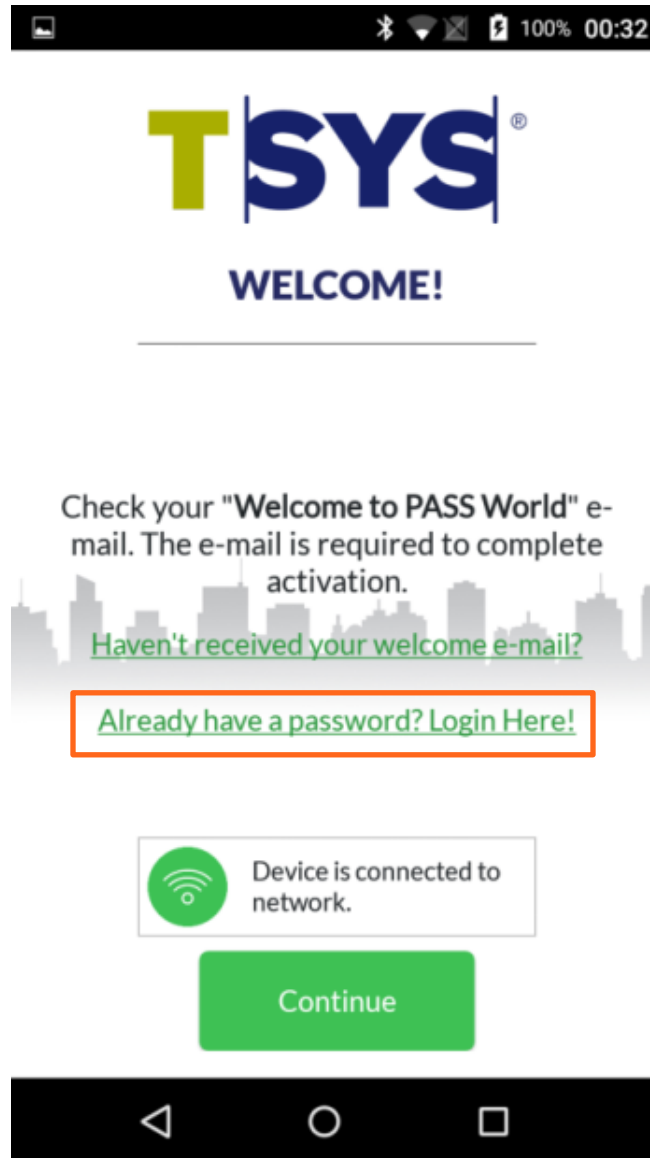


If you tap the forgot PIN button, and see the message, "Admin PIN Cannot be Reset", you will need to clear all application data for Payments 3.0 through Device Settings and Log back in to the application.

User Guide

Login to Your Account

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



User Guide

A login screen displays. Enter your login information.

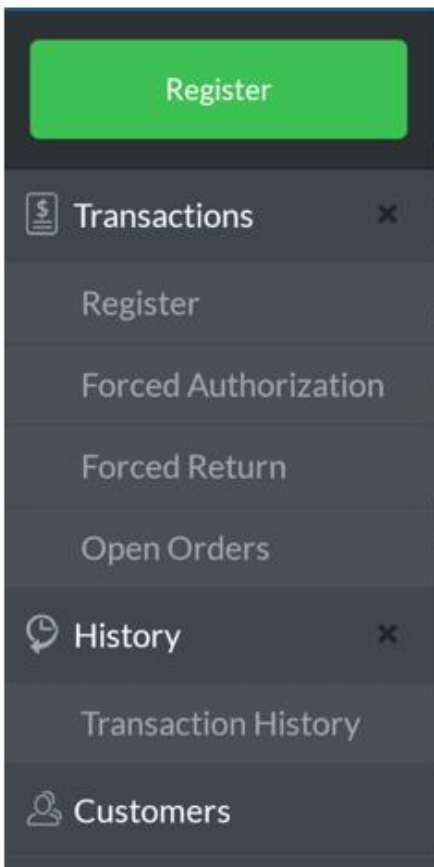
1. Enter your TA# in the **Username** field
2. Enter your **Password**.
3. Enter the Device ID. This is your 12 digit merchant number followed by the two digit device ID.
4. Tap **Login**.

The screenshot shows a mobile login interface. At the top is a status bar with a back arrow, Bluetooth, Wi-Fi, signal strength, battery at 7%, and time 07:07. Below the status bar is the TSYS logo. The main content area contains three stacked input fields: 'Username' (callout 1), 'Password' (callout 2), and 'Device ID' (callout 3). Below these fields is a green Wi-Fi icon and the text 'Device is connected to network.' Below that is a blue 'Login' button (callout 4) and a link that says 'Forgot Password?'. At the bottom is an Android navigation bar with back, home, and recent apps buttons.

User Guide

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

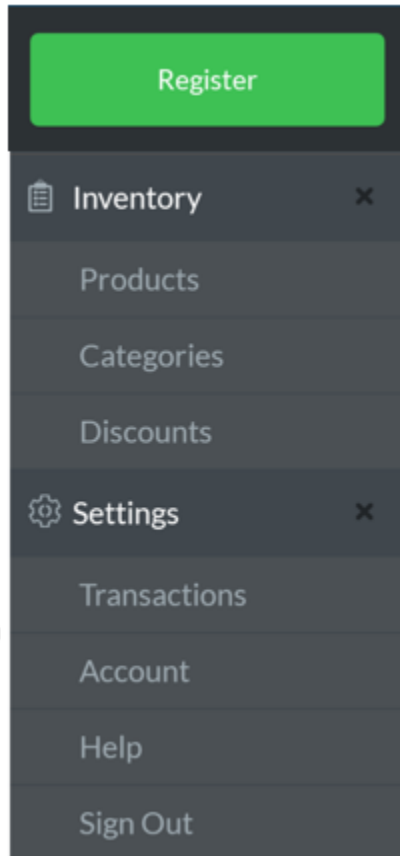
- **Transaction History** – Filter and search transaction history; view individual transactions; initiate returns from the transaction details in transaction history.

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.

User Guide



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.
- **Sign Out** – Sign out of the application.

User Guide

Settings, Account Information, and Help

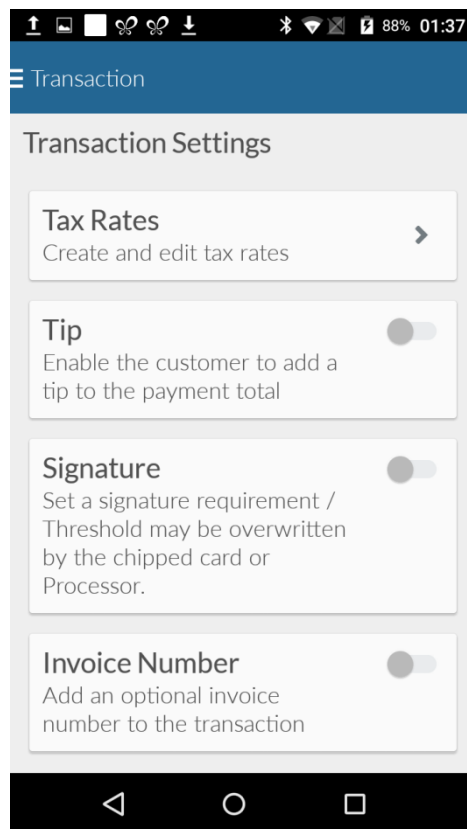
Manage Settings

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

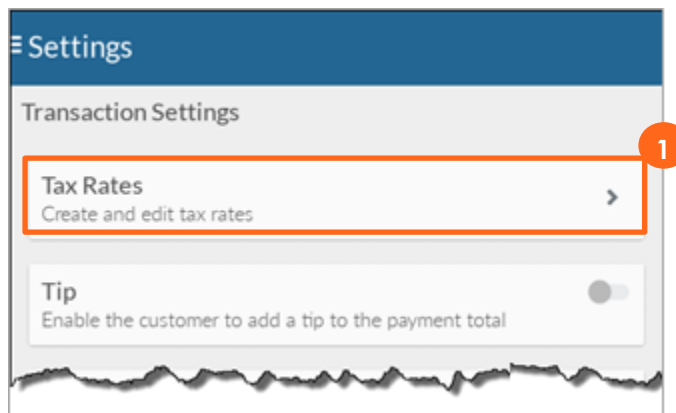
User Guide

Create a New Tax Rate

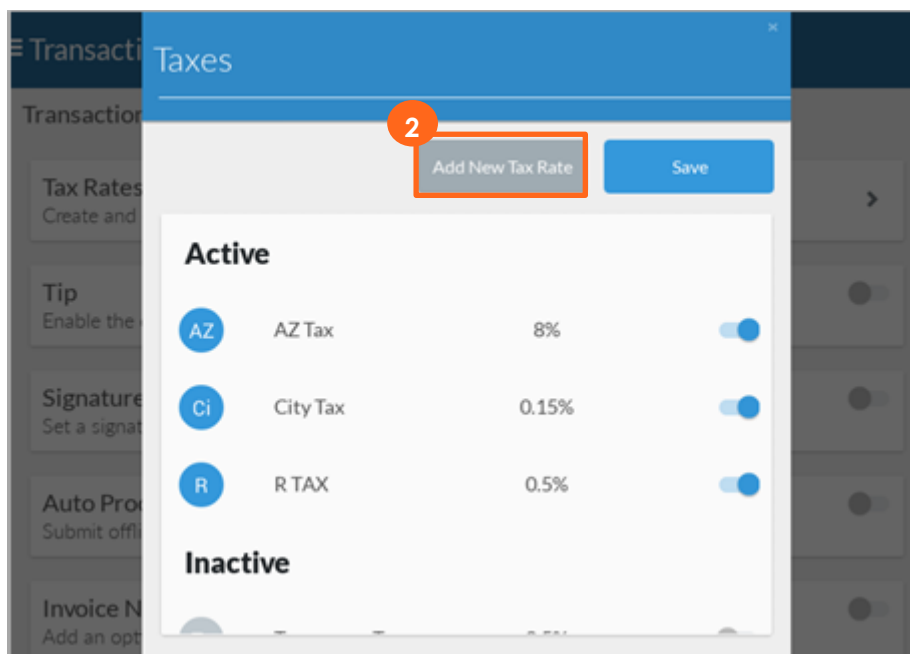
There are two types of tax rates: global taxes, which are applied to all products by default, and individual taxes, which must be assigned to each product. Global taxes can only be created in Merchant Center, whereas individual tax rates can be created in both Merchant Center and MPA—for more information 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.

User Guide

4. Tap **Save**.

Add Tax

Save

Tax Details

! This tax can be applied to all products using the "Add to All Products" function in Merchant Center.

Tax Name	Tax Amount
Enter Tax Name	00.00%

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.

Taxes

Add New Tax Rate Save

Ci	City Tax	0.15%	<input checked="" type="checkbox"/>
R	R TAX	0.5%	<input checked="" type="checkbox"/>
Inactive			
Te	Temporary Tax	0.5%	<input type="checkbox"/>
Gl	Global Tax	10%	<input type="checkbox"/>

Tap to edit a tax rate.

Tap to make a tax active or inactive.

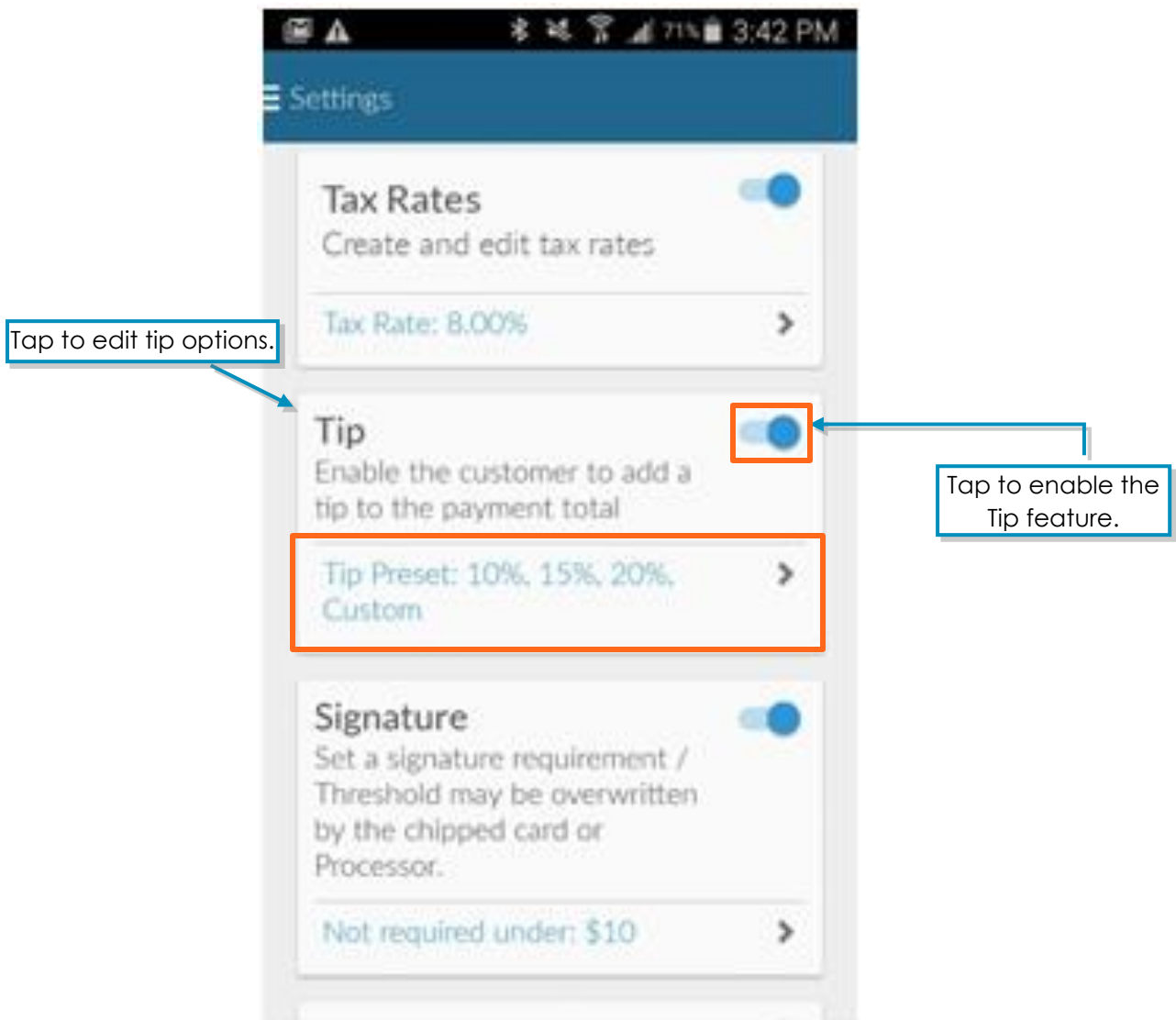
User Guide

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



User Guide

Tip Settings

The screenshot shows a mobile app interface for setting tip options. At the top, there's a blue header bar with the word "Tip" and a close button (X). Below the header, the text "Select 4 Tip options for your customers" is displayed. To the right of this text is a blue button labeled "Set tip options". Below the text, there's a list of five tip options: "10.00%", "15.00%", "20.00%", "25.00%", and "Custom". The first four percentage options are highlighted with a blue border, and the entire list is enclosed in an orange border. Three callout boxes with arrows point to specific elements: one points to the list of options, another points to the "Set tip options" button, and a third points to the right side of the screen.

Tip

Select 4 Tip options for your customers

Set tip options

10.00%

15.00%

20.00%

25.00%

Custom

Choose four tip options.

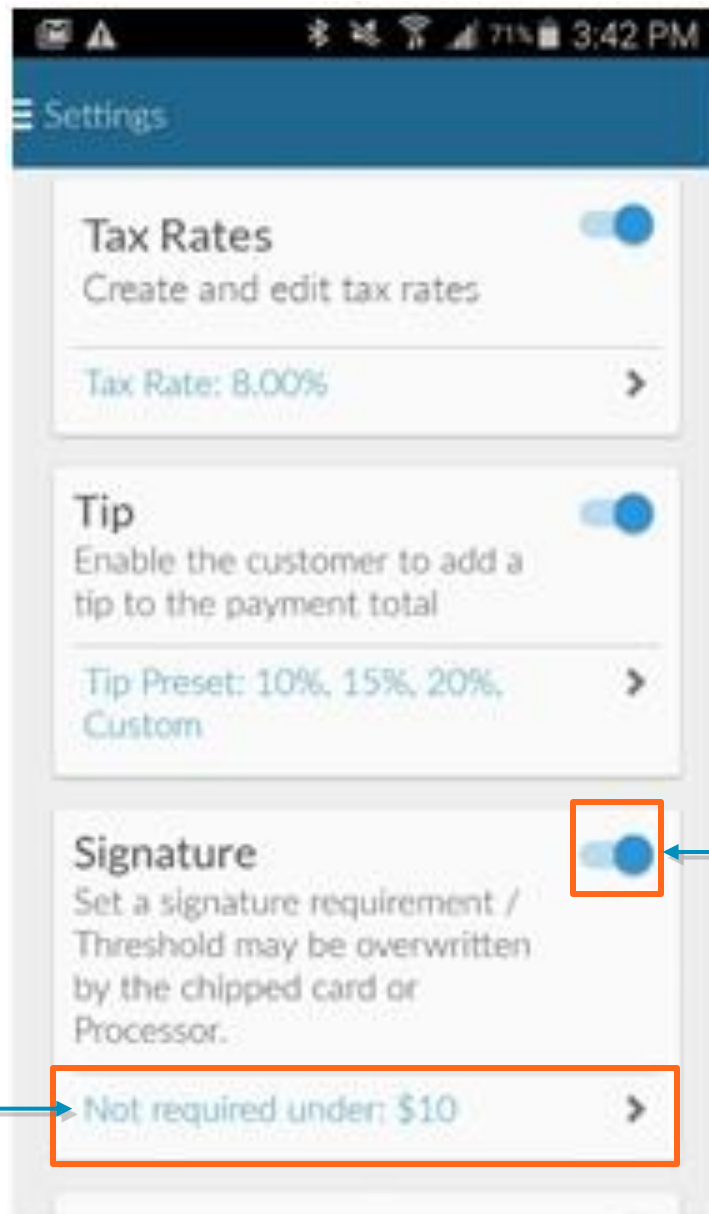
Tap to save your tip options.

User Guide

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.

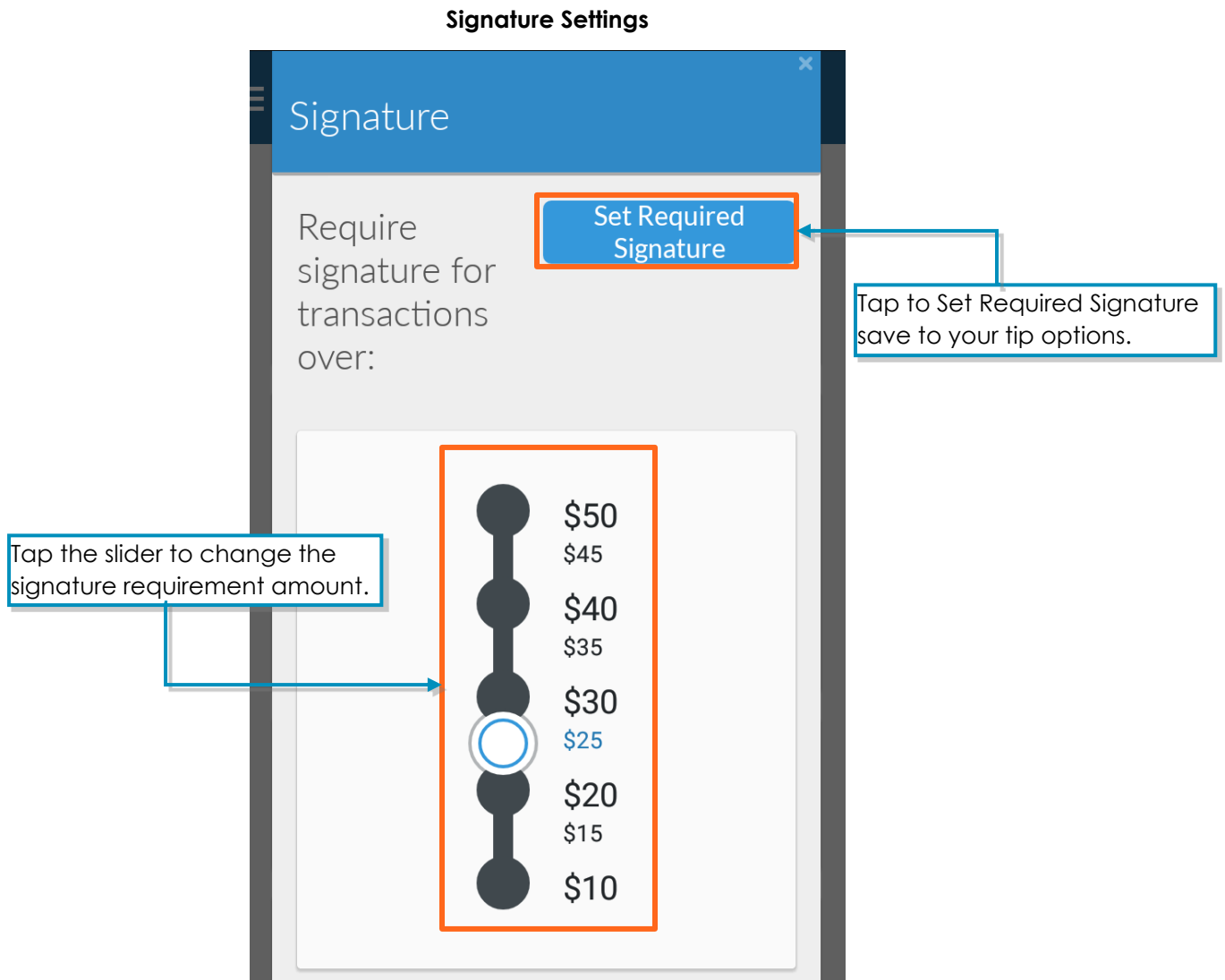
Settings Page



Tap to enable the Signature option.

Tap to edit signature amount.

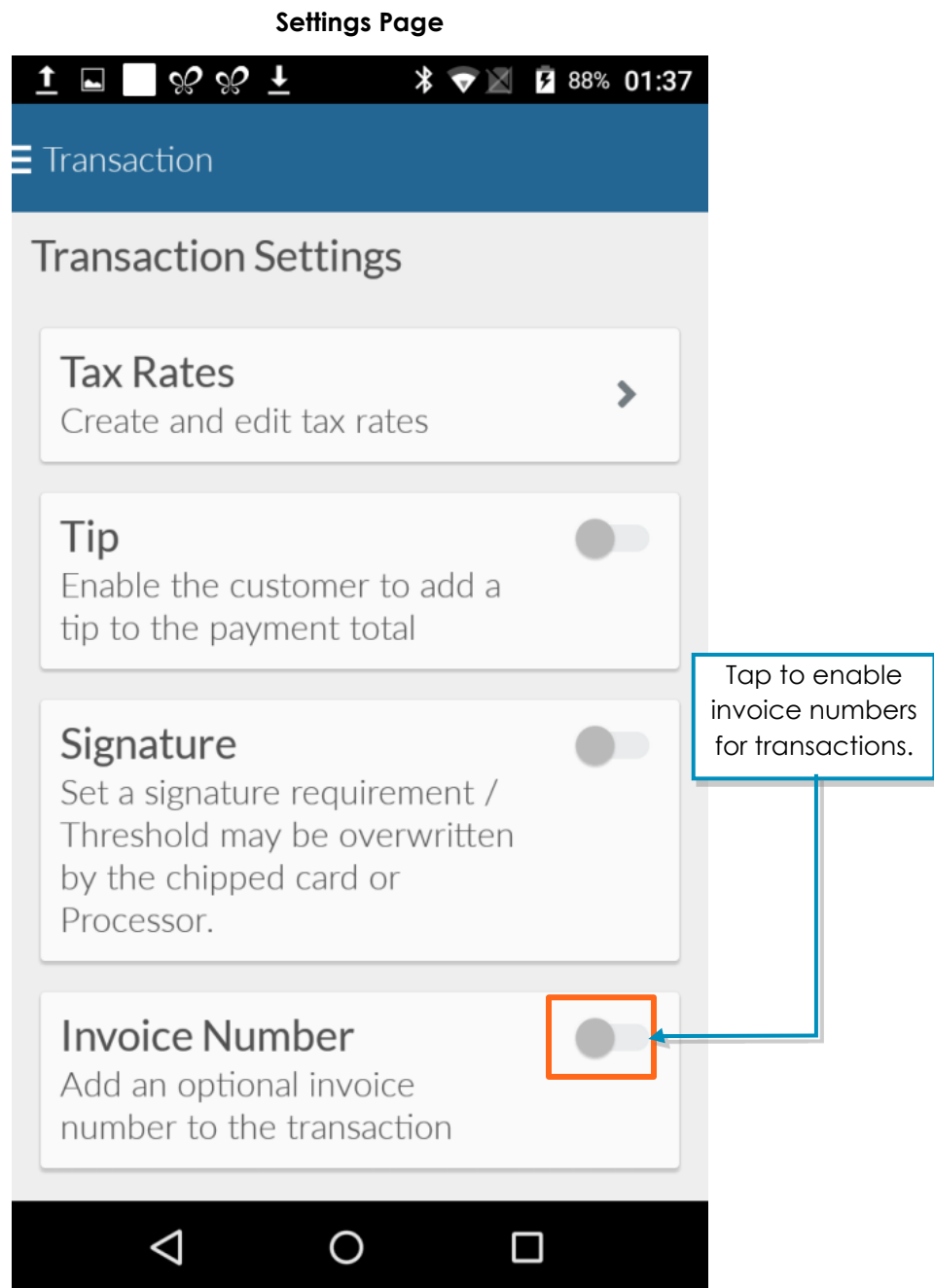
User Guide



User Guide

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.



User Guide

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.

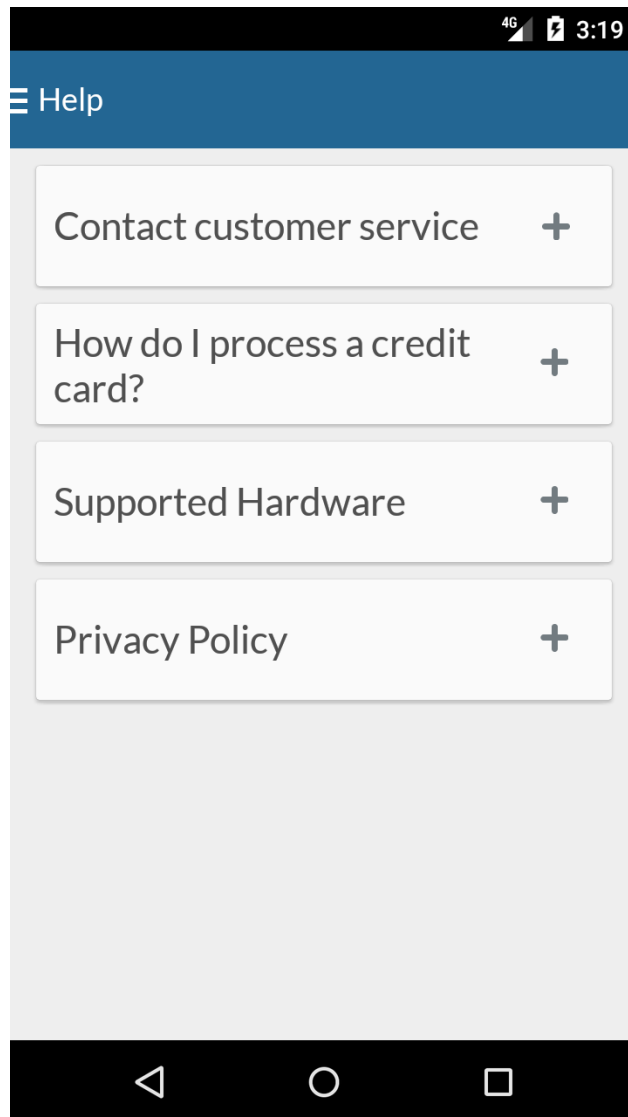


User Guide

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



User Guide

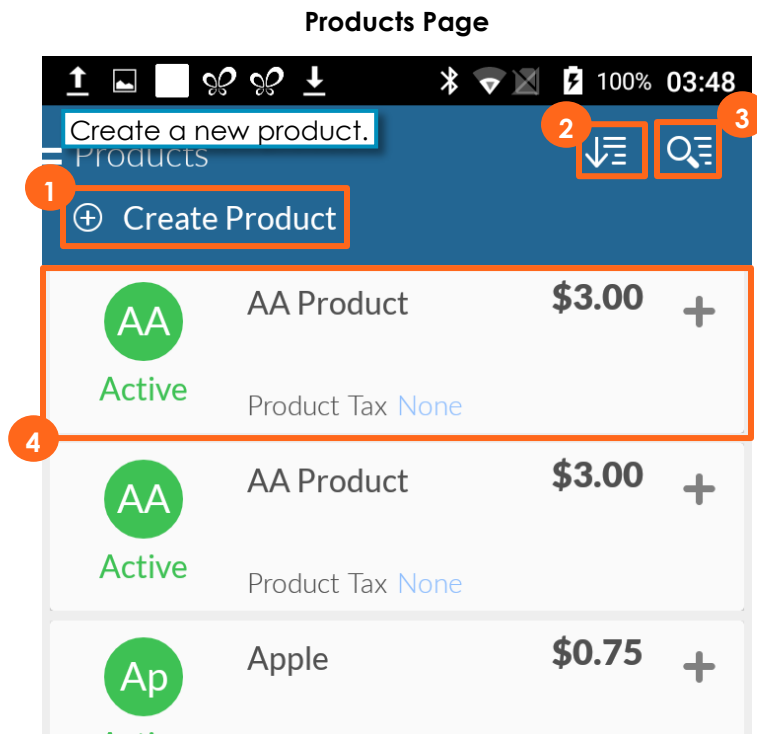
Products, Categories, Discounts and Customers

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 filter and search for products.
4. Tap an individual product to display or edit the product details.



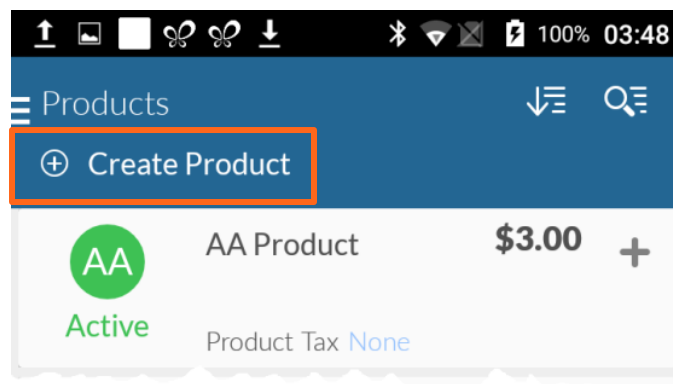
User Guide

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**.



User Guide

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

The screenshot shows a mobile application interface for creating or editing a product. At the top, there is a header bar with a blue background and a white circle icon. Below the header, the text 'Product Name' is displayed next to a price of '\$0.00'. A red circle with the number '2' is placed next to the 'Product Name' text. Below this, a red circle with the number '3' is placed next to a blue 'Save' button. The 'Save' button is located in the top right corner of a white box that contains the product information form. The form is titled 'General Product Info' and includes several input fields: 'Enter Product Name' (with a placeholder 'Enter Product Name'), 'Price' (with a placeholder '\$0.00'), 'Active Product' (a toggle switch that is currently turned on), 'Track Inventory' (a toggle switch that is currently turned off), 'Quantity' (a text input field), 'Code/SKU' (a text input field), 'UPC' (a text input field), and 'Description' (a text input field). The form is outlined with a red border. The background of the app is dark grey. At the bottom of the screen, there is a black navigation bar with three white icons: a triangle, a circle, and a square.

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

User Guide

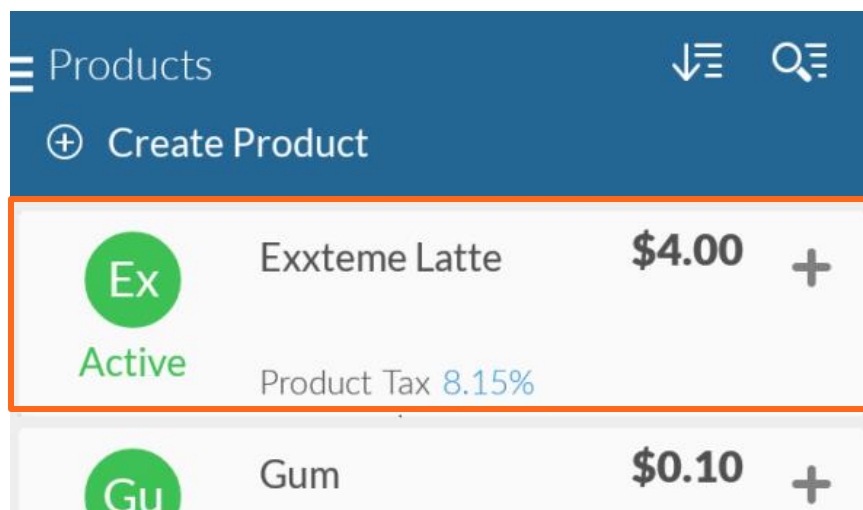
Remove a Product

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.



User Guide

2. Tap **Product Details**.

Products

↓

🔍

⊕ Create Product

Ex Exxteme Latte **\$4.00** x

Active Product Tax 8.15%

Applied Taxes 1 Product Discount None

Description Quantity

An EXTREME versio... 1

UPC

1230948000034

Product Details Start Transaction

Gu Gum **\$0.10** +

User Guide

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

Exx Exxteme Latte \$4.33

Complete the sections below to create or edit a product.

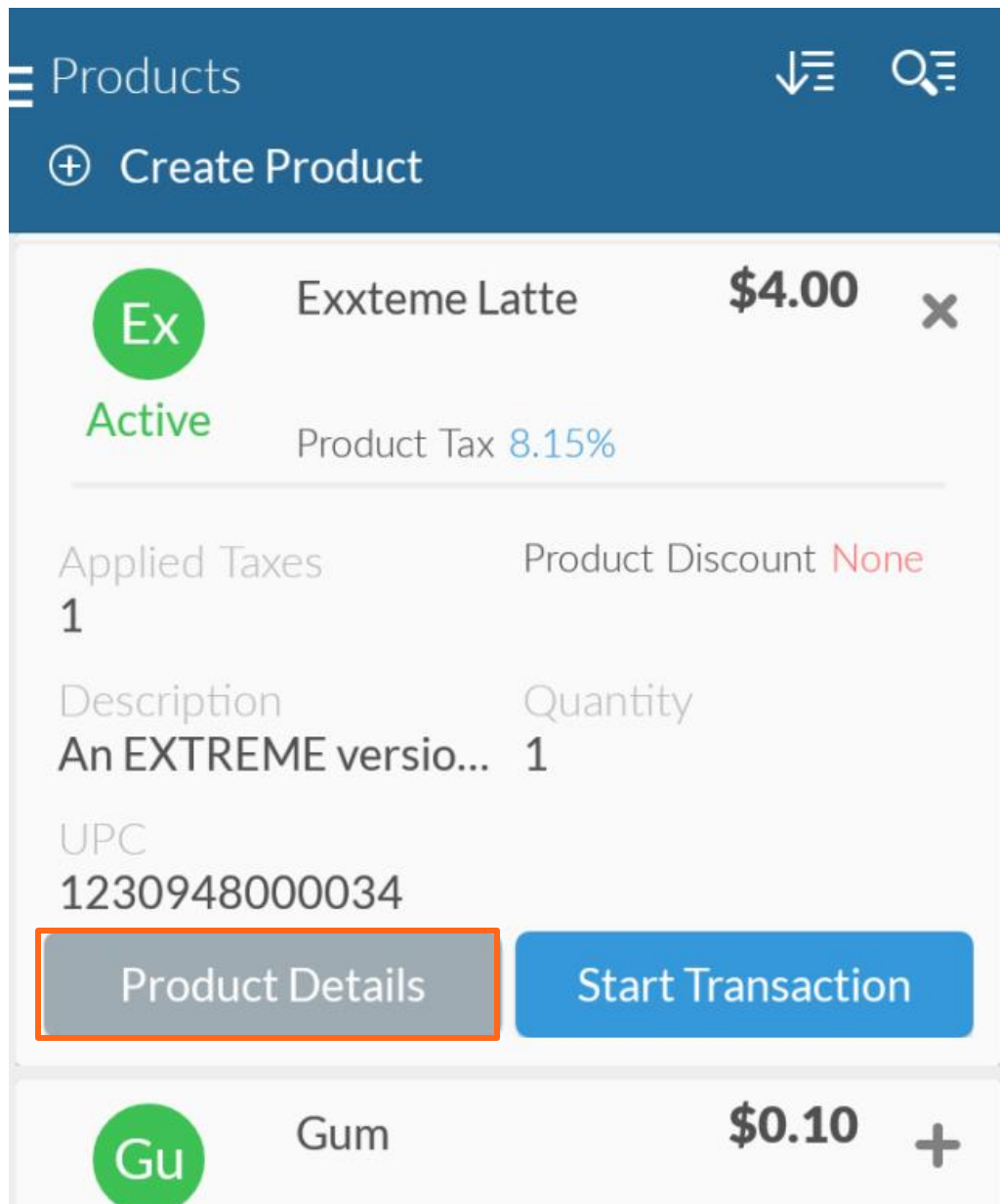
Delete Save

General Product Info

	Price
Exxteme Latte	\$4.00
Quantity	UPC
1	123094800000
Code/SKU	
ESP007	
Track Inventory	<input checked="" type="checkbox"/>
Active Product	<input checked="" type="checkbox"/>

User Guide

5. Tap **Product Details**.



User Guide

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

The screenshot shows a mobile application interface for editing a product. At the top, a blue header bar contains a circular icon with 'Ex', the product name 'Exxteme Latte', and the price '\$4.33'. Below the header, a light gray box contains the text 'Complete the sections below to create or edit a product.' and two buttons: 'Delete' (highlighted with an orange border) and 'Save'. Below this is a white box titled 'General Product Info' with a close button. Inside this box, there are two columns of input fields. The left column has fields for 'Exxteme Latte', 'Quantity' (with the value '1'), and 'Code/SKU' (with the value 'ESP007'). The right column has fields for 'Price' (with the value '\$4.00') and 'UPC' (with the value '12309480000'). At the bottom of the 'General Product Info' box, there are two toggle switches: 'Track Inventory' and 'Active Product', both of which are currently turned on.

General Product Info	
Exxteme Latte	Price
Exxteme Latte	\$4.00
Quantity	UPC
1	12309480000
Code/SKU	
ESP007	
Track Inventory	<input checked="" type="checkbox"/>
Active Product	<input checked="" type="checkbox"/>

User Guide

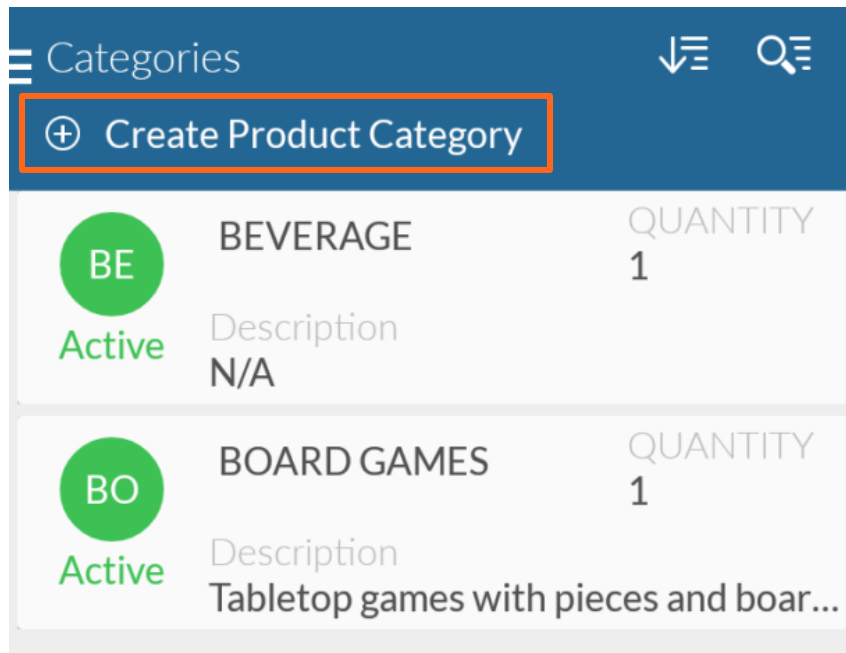
Categories

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**.



User Guide

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

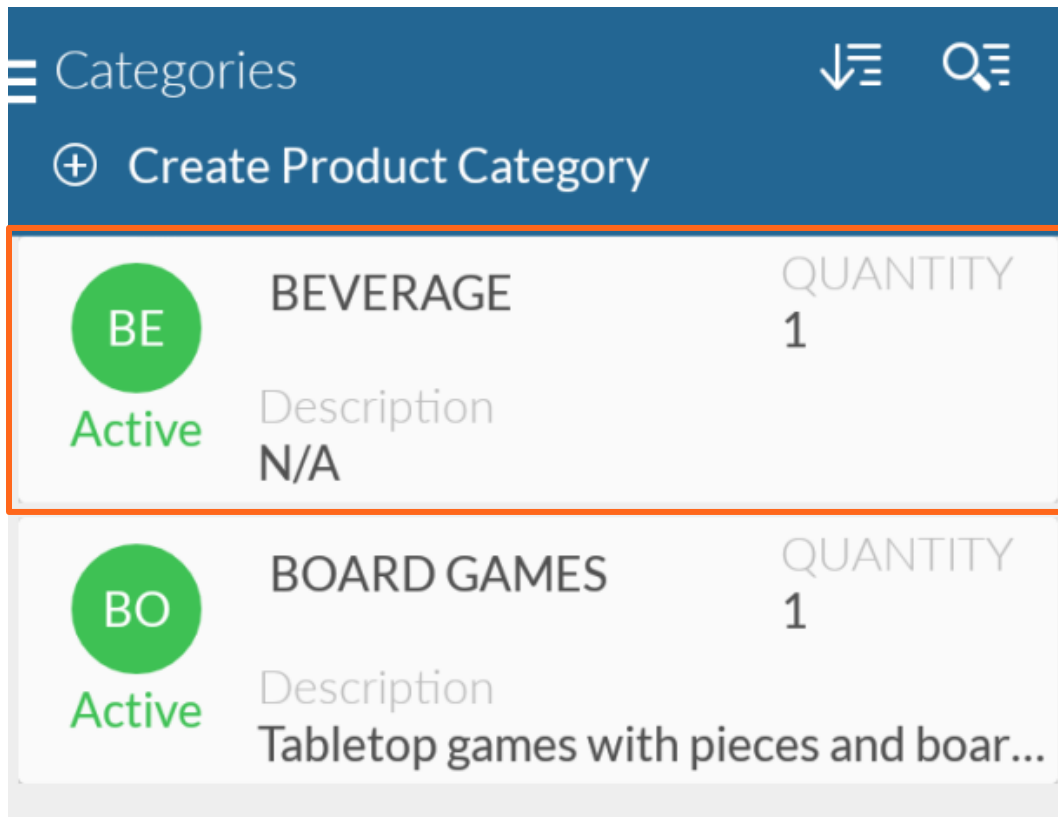
The screenshot shows a mobile application interface for creating or editing a product category. At the top, a blue header bar contains a circular icon and the title "Product Category Name". Below the header, a light gray instruction box says "Complete the sections below to create or edit a product category." To the right of this box is a blue "Save" button, which is highlighted with an orange rectangle and a red circle containing the number 3. Below the instruction box is a white form titled "General Product Category Info", which is outlined with an orange rectangle and has a red circle containing the number 2 at its top-left corner. The form contains two input fields: "Enter Category name" and "Description".

User Guide

Modify an Existing Category

To modify an existing category from the Category page:

1. Tap the category you wish to modify.



User Guide

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**.

The screenshot shows a mobile application interface for editing a product category. At the top, there is a blue header with a hamburger menu icon on the left, a circular logo containing the letters 'BE', and the word 'BEVERAGE' in white. Below the header, a light gray box contains the instruction 'Complete the sections below to create or edit a product category.' and a blue 'Save' button. A red circle with the number '4' is next to the 'Save' button. Below this is a white box titled 'General Product Category Info' with a close icon in the top right. Inside this box, the word 'BEVERAGE' is displayed above a horizontal line. To the right of this line is the text 'Active Category' and a toggle switch. A red circle with the number '3' is next to the toggle switch, which is currently in the 'on' position. Below the 'Active Category' section is a gray box labeled 'Description' containing the text 'Hot and cold drinks'. A red circle with the number '2' is next to the entire 'General Product Category Info' box.

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.

User Guide

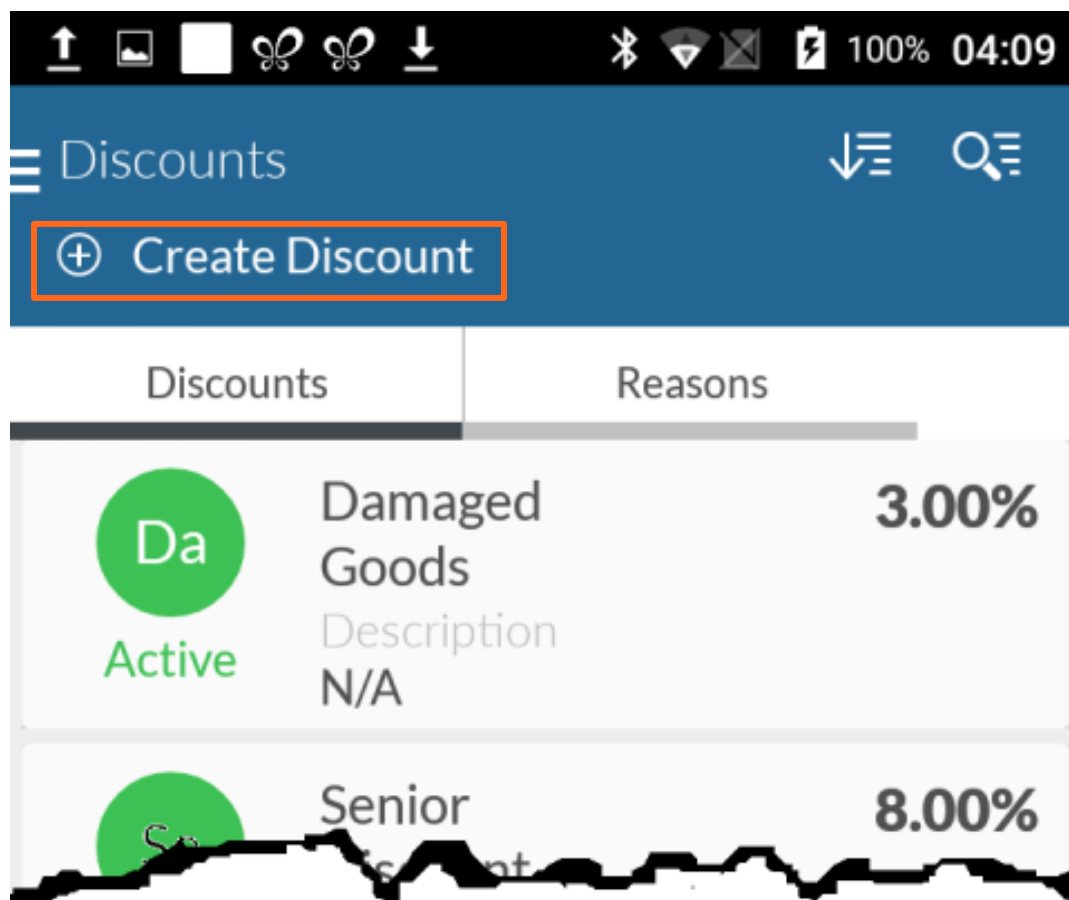
Discounts

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**.



User Guide

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.

Discount Name \$0.00

Use the fields below to create/modify a discount

Save

2

Discount Name

Enter Name

Dollar Amount

Discount Value

Enter Value

Active Discount ☐

Applicable to Transactions ☐

Applicable to Products ☐

Stackable ☐

Description

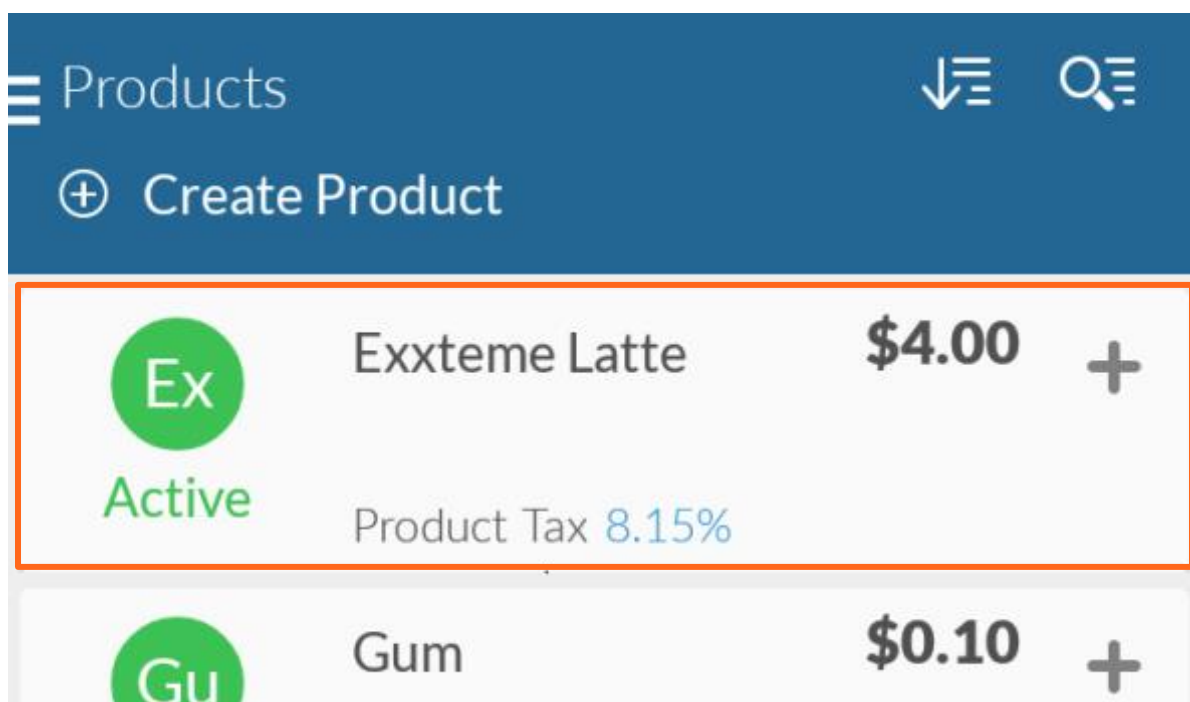
3. Tap **Save**. If you have not entered the appropriate information, you may not be able to proceed.

User Guide

Add a Single Discount to a Product

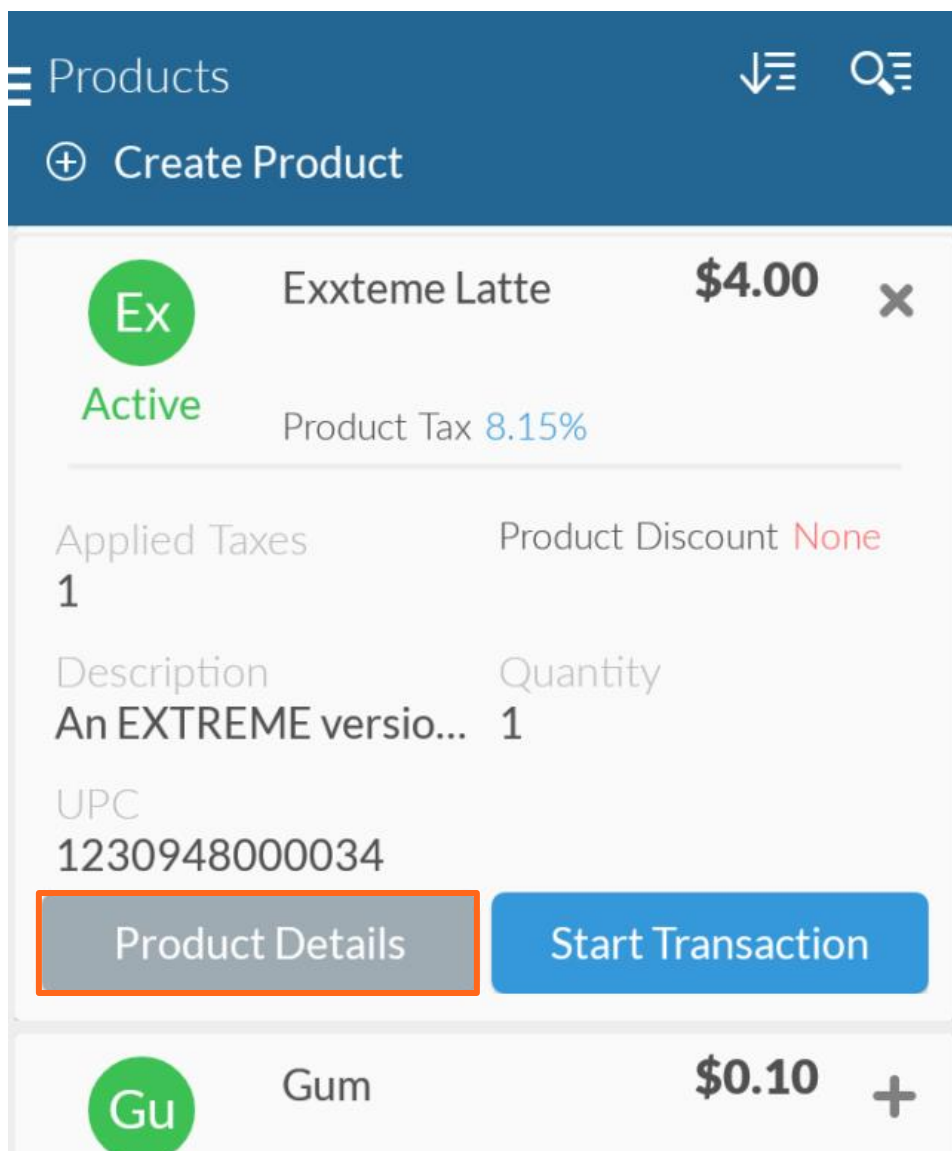
When discount is added to a product in the Products page, every time that product is added to a transaction, that discount will automatically be applied. To add single discounts to products from the Products page:

1. Tap the product you wish to modify.



User Guide

2. Tap **Product Details**.



User Guide

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

The screenshot shows the 'Exxteme Latte' product edit screen. At the top, the product name 'Exxteme Latte' and price '\$4.33' are displayed. Below this, there are 'Delete' and 'Save' buttons. A red circle with the number '5' is placed over the 'Save' button. The 'General Product Info' section contains fields for 'Price' (\$4.00), 'Quantity' (1), 'UPC' (12309480000), and 'Code/SKU' (ESP007). There are also toggle switches for 'Track Inventory' and 'Active Product', both of which are turned on. A 'Description' field contains the text 'An EXTREME version of the regular latte'. Below the description is a 'Taxes' section showing '8.15%' with a '+' icon. A red circle with the number '3' is placed over this '+' icon. The 'Discounts' section shows three discount options: 'Di' (5.00%, disabled), 'Ma' (10.00%, enabled), and 'Ye' (5.00%, disabled). A red circle with the number '4' is placed over the 'Ma' discount's toggle switch. A red circle with the number '3' is also placed over the 'x' icon in the top right corner of the Discounts section.

User Guide

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.

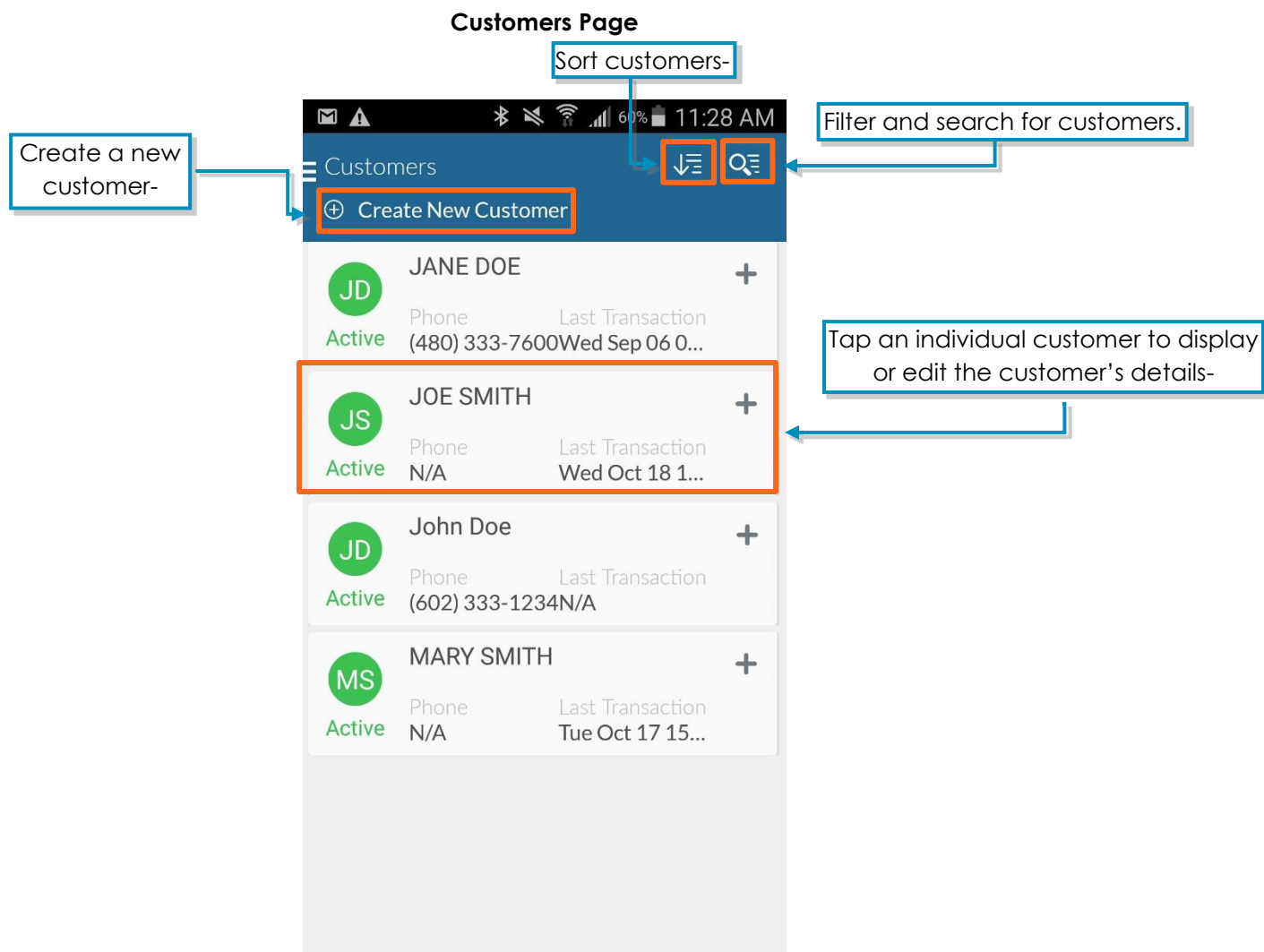
Note: Only one discount can be active at a time when modifying items on the Products page. You can still add additional discounts to single products or to the entire cart during a transaction which is described in the Transactions section of this guide.

User 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.



User Guide

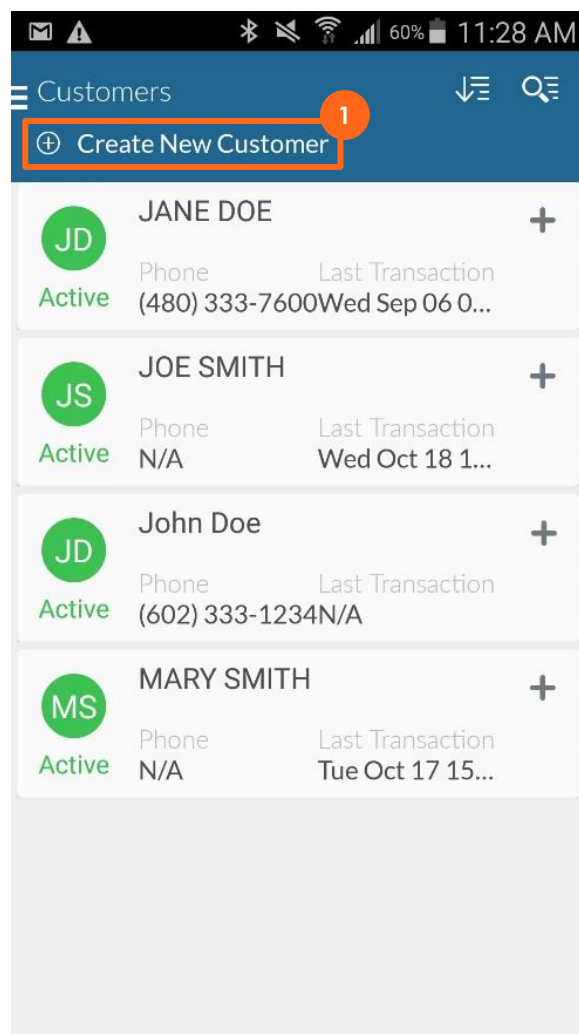
Add New Customer

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**.

JD JANE DOE

Complete the sections below to create or edit a customer

Remove Save

2

Customer Information

JANE DOE

(480)333-7600 jdoe@tsys.com

Is this an active customer? ☒

Customer Address

8320 S HARDY DR

Address Line 2

TEMPE AZ 85284

Business information

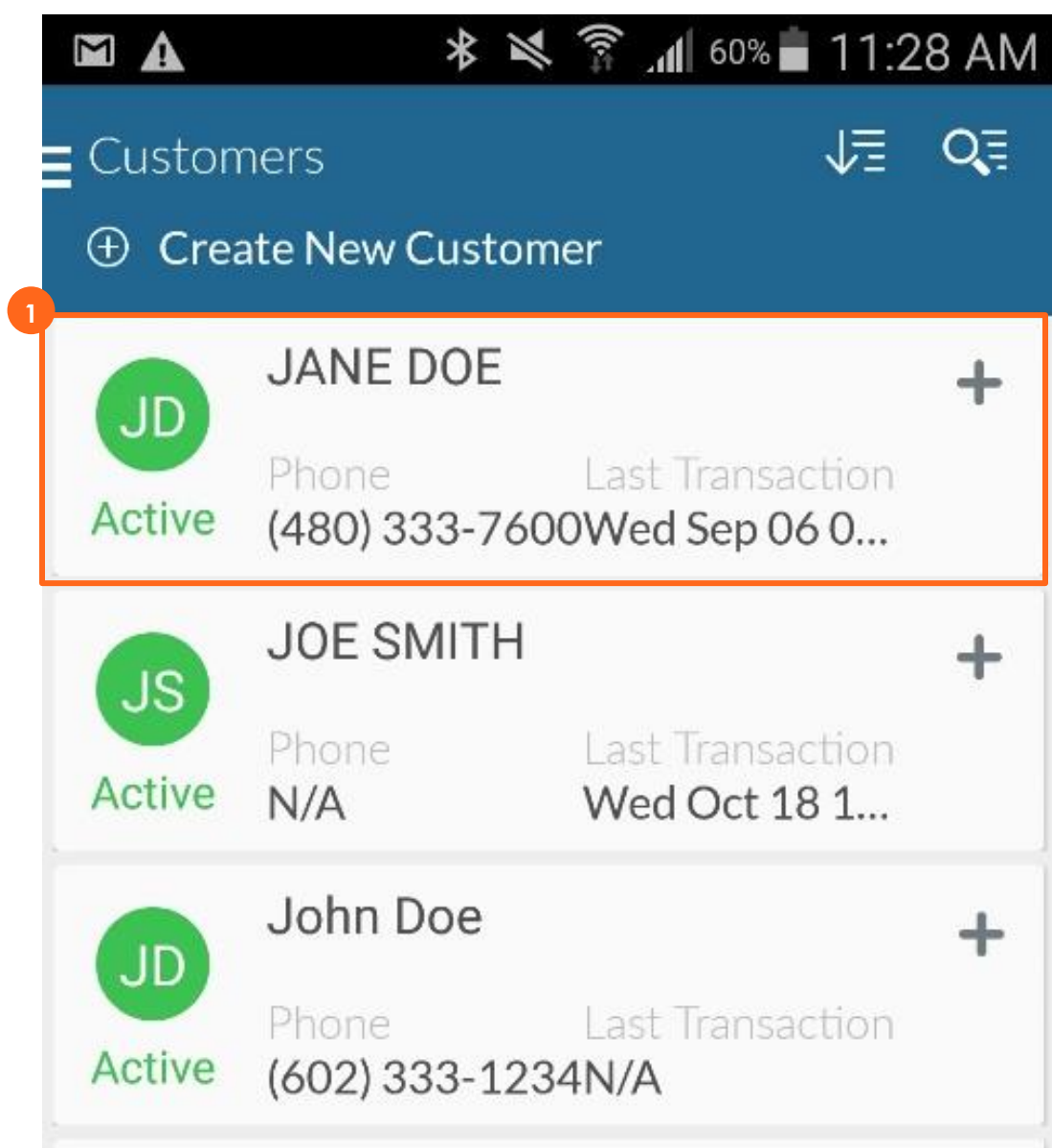
Duplicate Customer Start Transaction

User Guide

Duplicate a Customer

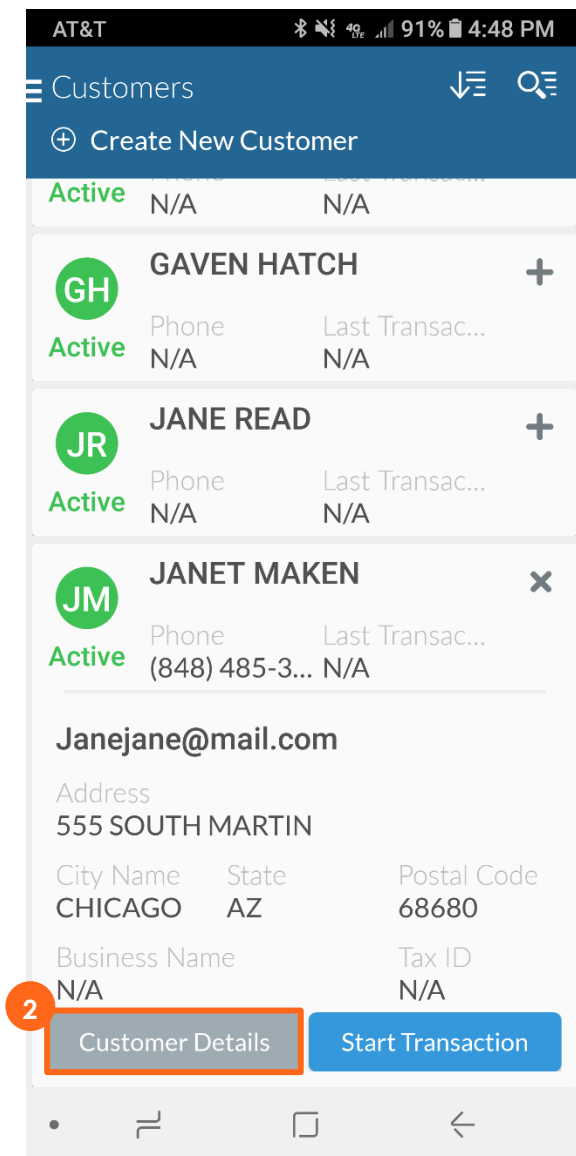
To add a new customer by duplicating an existing customer's profile:

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



User Guide

2. Tap **Customer Details**.



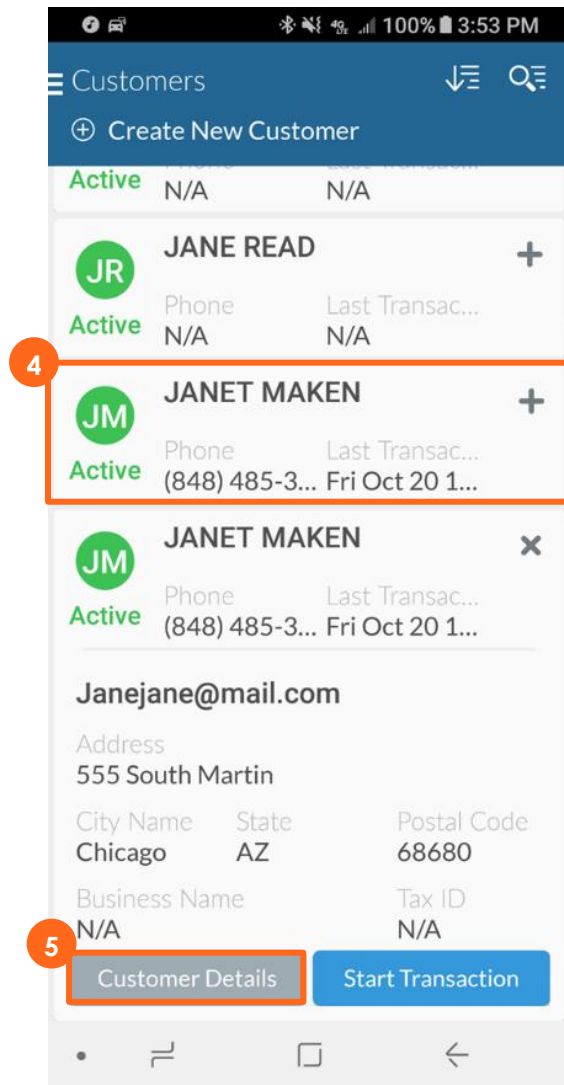
User Guide

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

The screenshot shows a mobile app interface for managing a customer profile. At the top, there's a blue header with a circular icon containing the letter 'J' and the name 'JANET MAKEN'. Below the header, there's a section titled 'Complete the sections below to create or edit a customer' with 'Remove' and 'Save' buttons. The main content area has three expandable sections: 'Customer Information' (which is expanded), 'Customer Address', and 'Business information'. The 'Customer Information' section contains fields for first name (JANET), last name (MAKEN), phone number ((848)485-3333), and email (Janejane@mail.c), along with a toggle switch for 'Is this an active customer?' which is currently turned on. At the bottom of the screen, there are two buttons: 'Duplicate Customer' (highlighted with an orange box and a red circle with the number 3) and 'Start Transaction' (green). The bottom of the screen shows standard Android navigation icons.

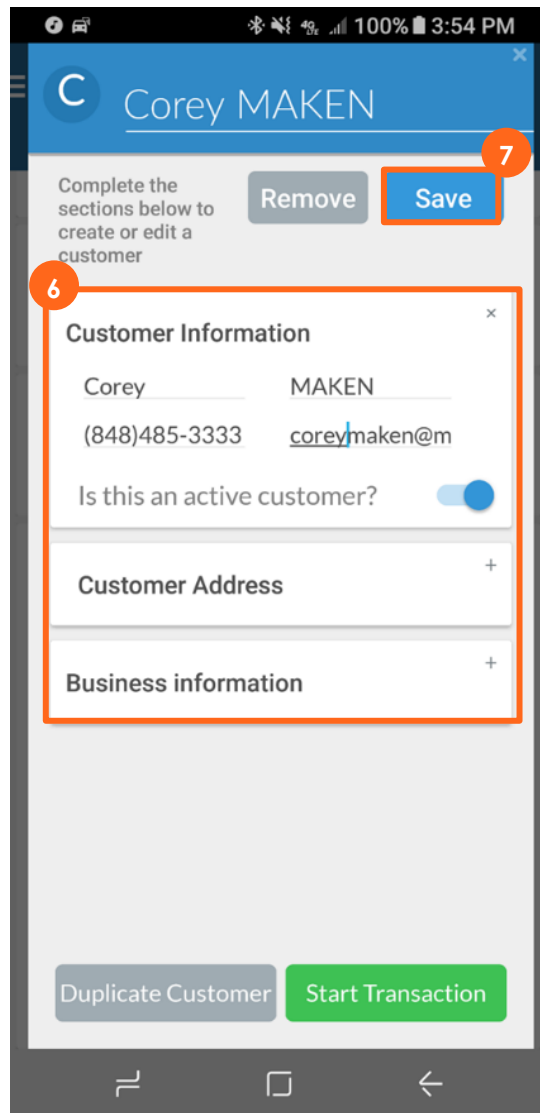
User Guide

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



User Guide

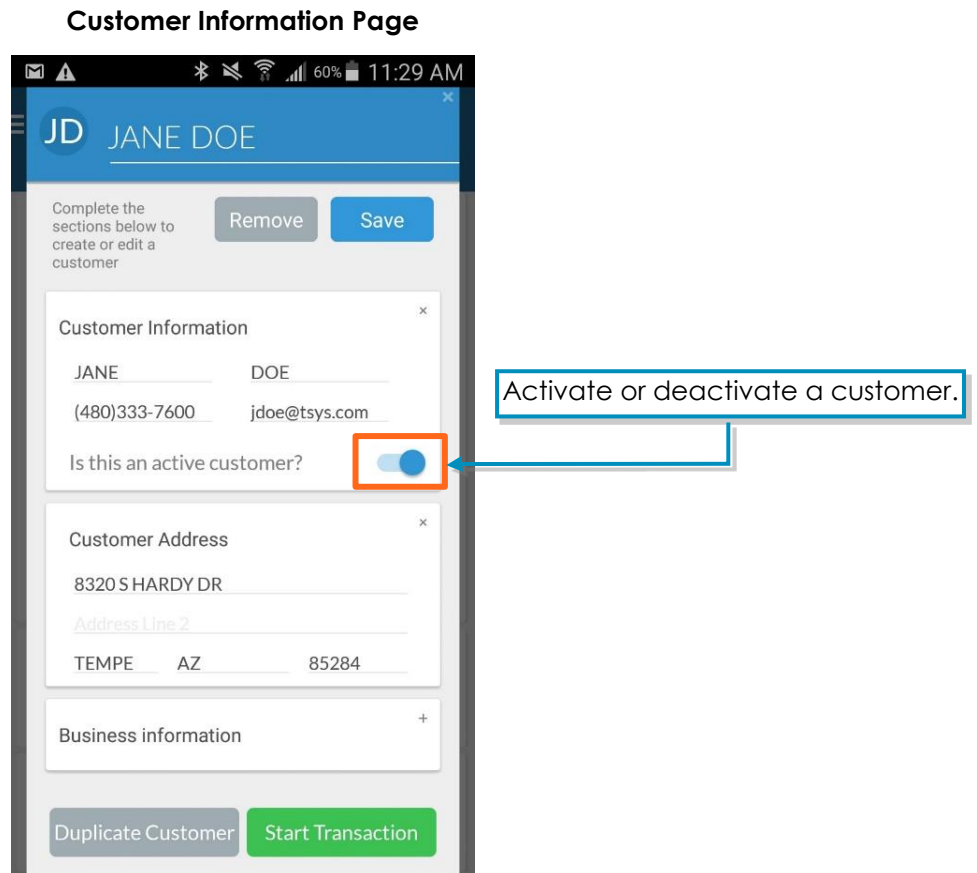
6. Edit the **customer information** as needed.
7. Tap **Save**.



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.



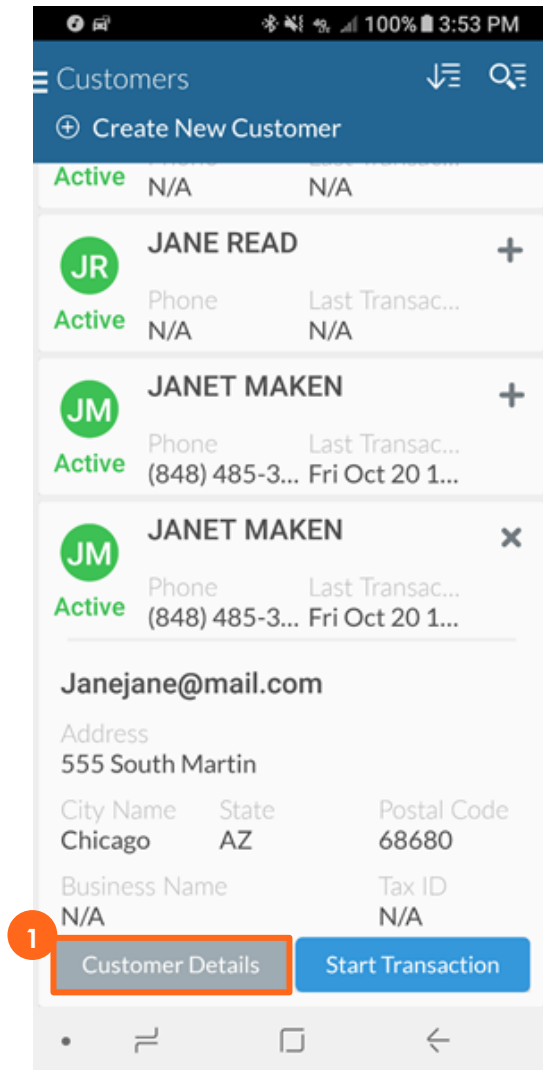
You can also permanently remove a customer from your customer list. Removed customers will not show up in reports.

User Guide

Remove a Customer

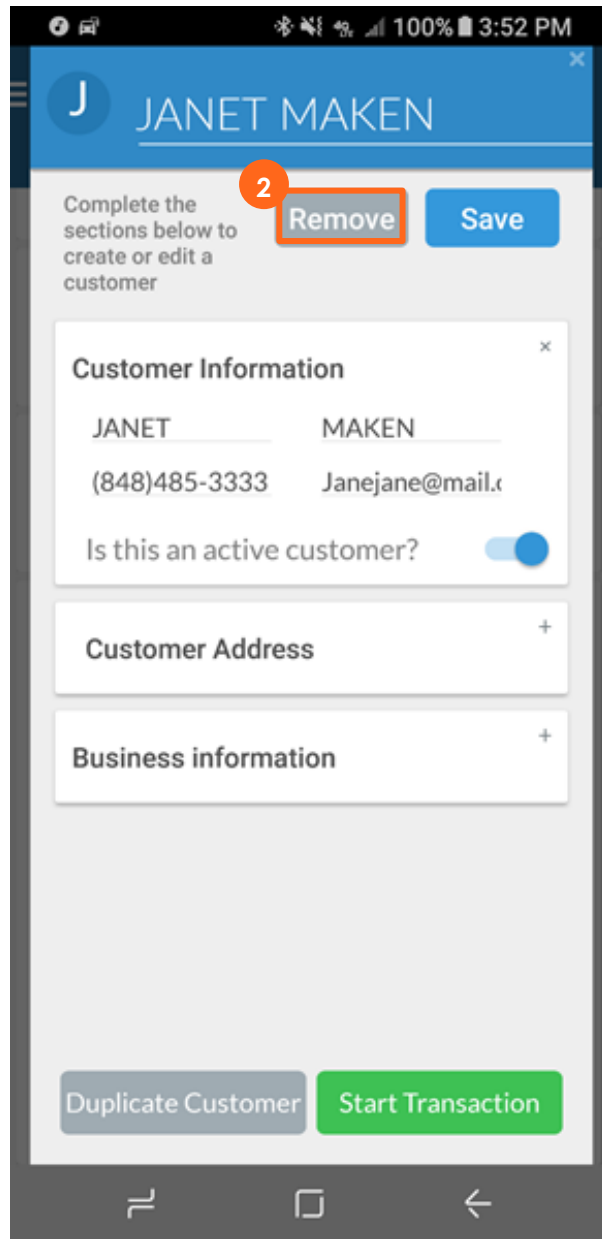
To remove a customer from your customer list:

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.



User Guide

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

The image shows two side-by-side screenshots of a mobile application interface. The left screenshot is the 'Register' page, and the right screenshot is the 'Cart' page.

Register Page:

- Header: 'Register' on the left, '\$3.25 3' on the right.
- Navigation: 'Quick Sale', 'Products' (selected), 'Discounts', and a search bar 'Search..'. Below these is a 'Create Product' button.
- Product List:

Product	Price
4 All Products	^
Chips	0.75
Cotton Candy	1.50
Hot Dog	1.50
Soda	1.00

Cart Page:

- Header: '← Cart' on the left, 'Customer' and 'Save Order' button on the right.
- Item List:

Item	Quantity	Price
Hot Dog	1	1.50
Chips	1	0.75
Soda	1	1.00

Summary:

Subtotal	\$3.25
Tax	\$0.00
Total	\$3.25

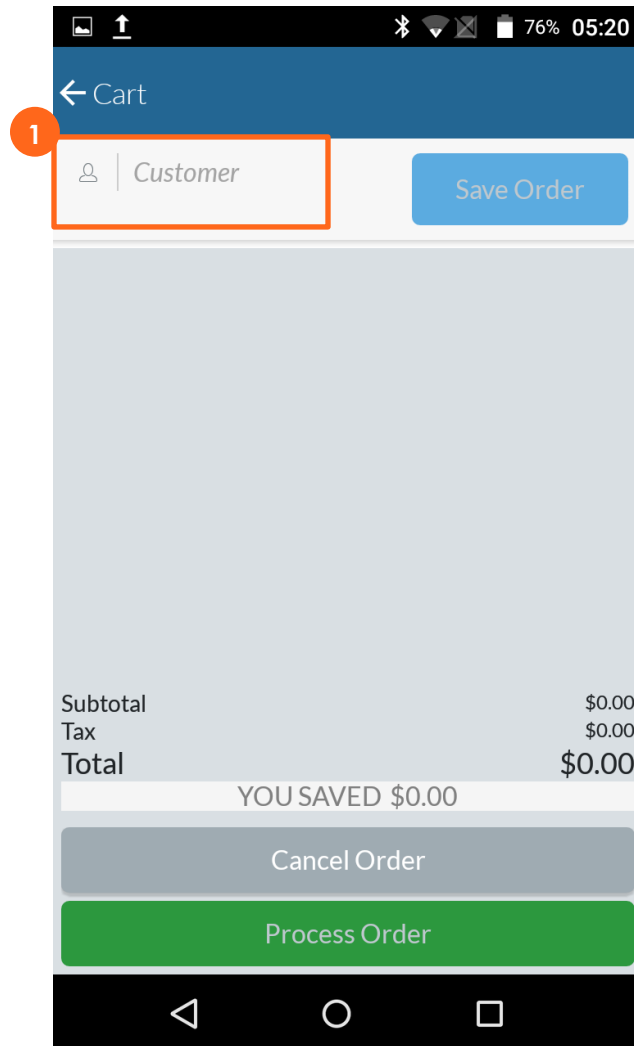
YOU SAVED \$0.00

Buttons: 'Cancel Order' (grey), 'Process Order' (green).

User Guide

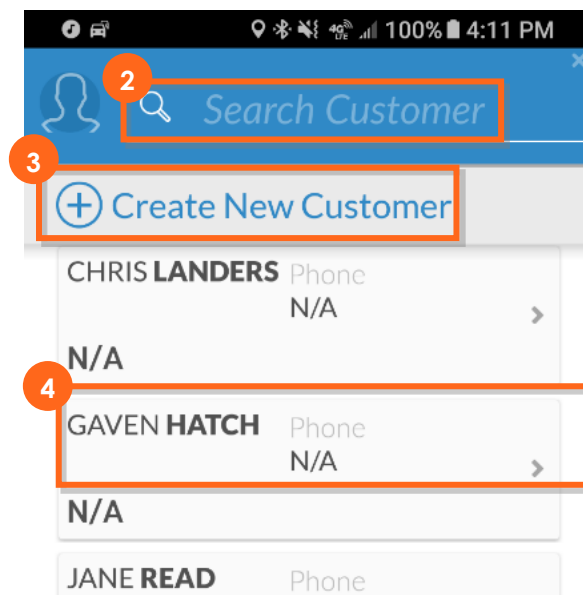
Add a Customer to a Transaction

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



User Guide

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.

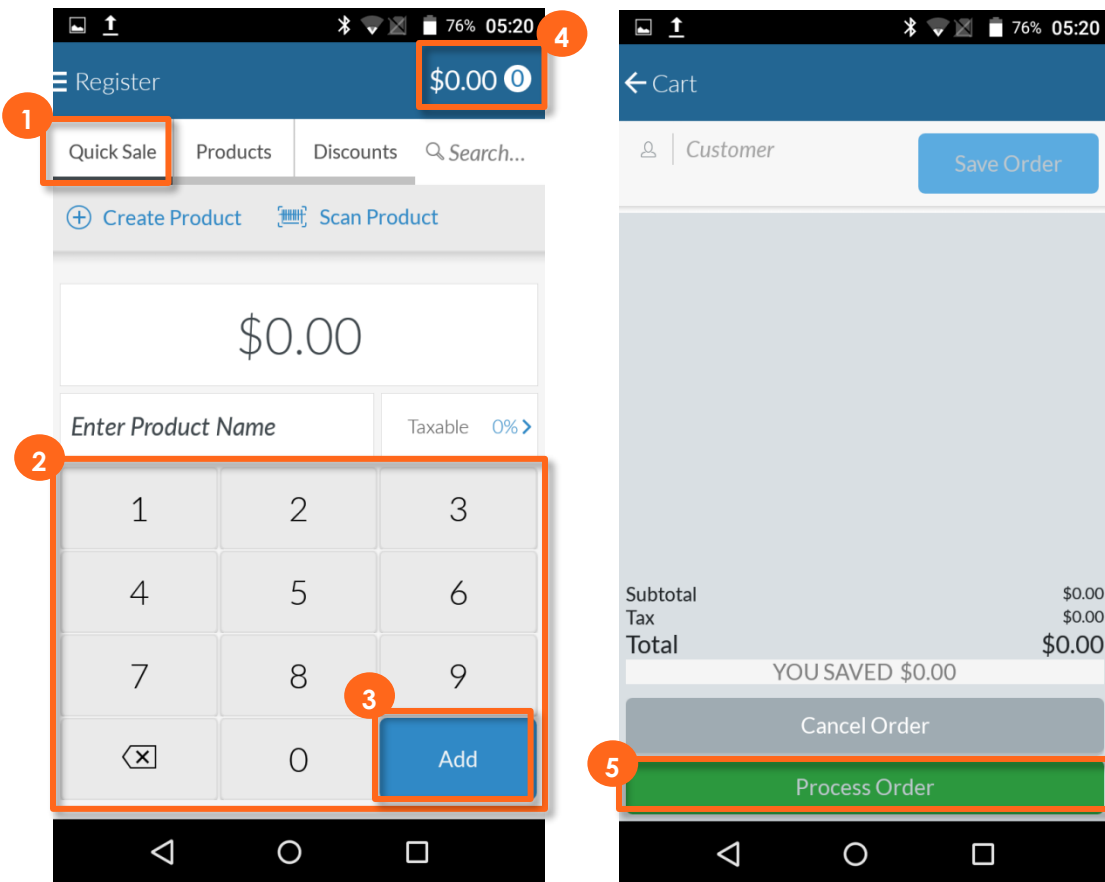
You also have the option of entering customer information for an existing or new customer, or adding an invoice number if your business uses them.

User Guide

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.

User Guide

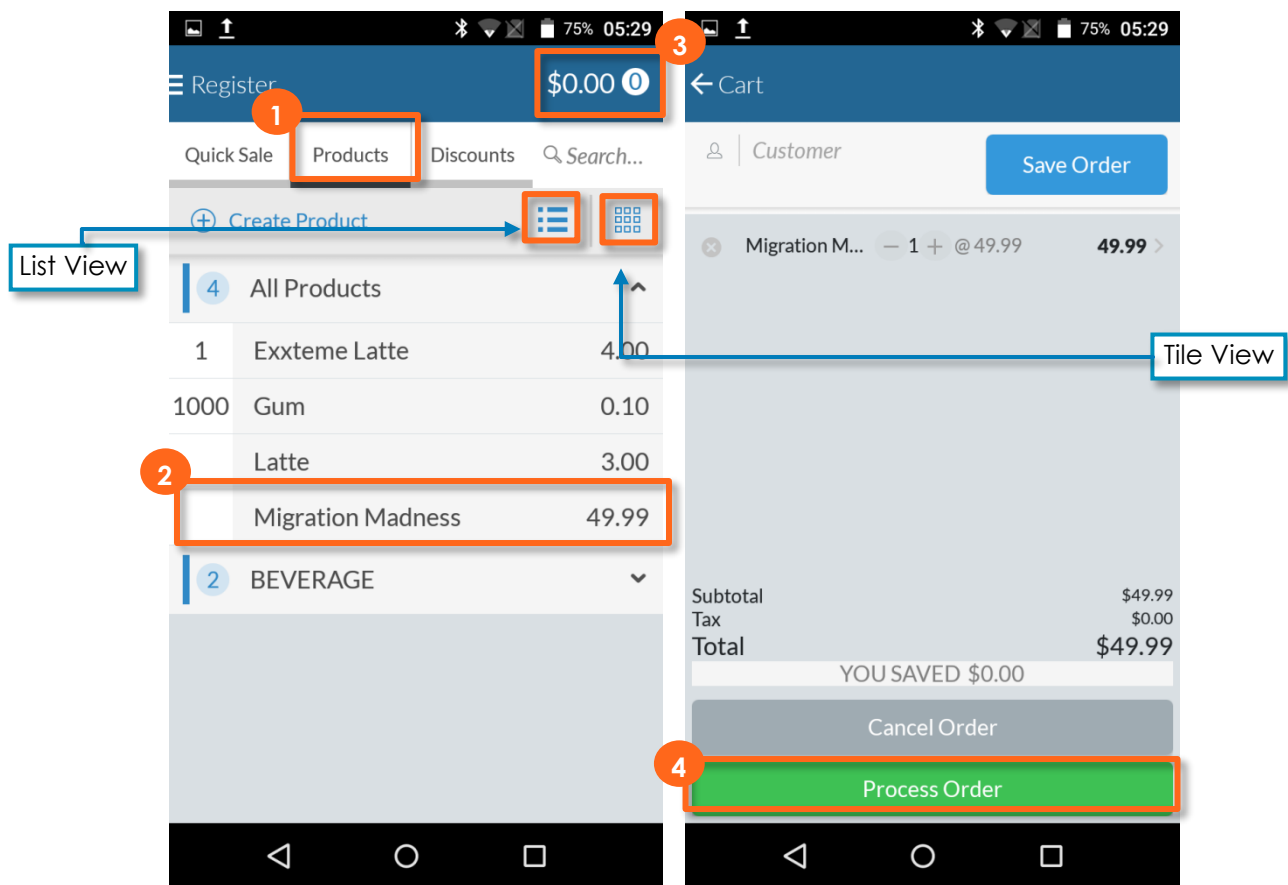
Begin a Transaction by Adding a Product

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.

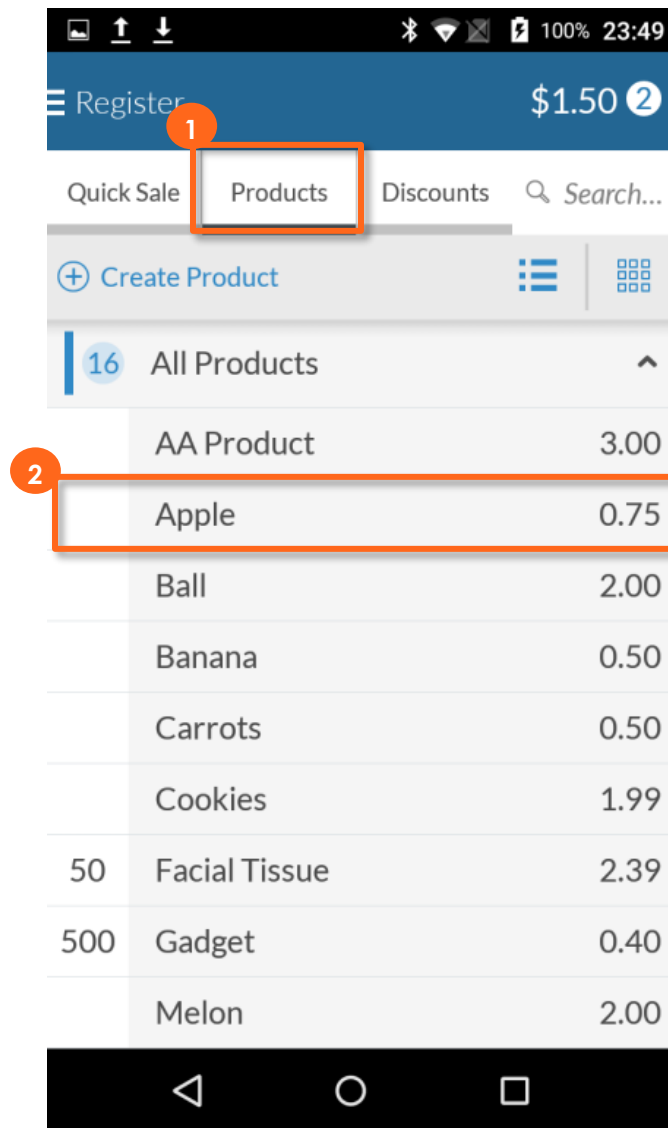


User Guide

Adding a Customizable Product to a Transaction

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

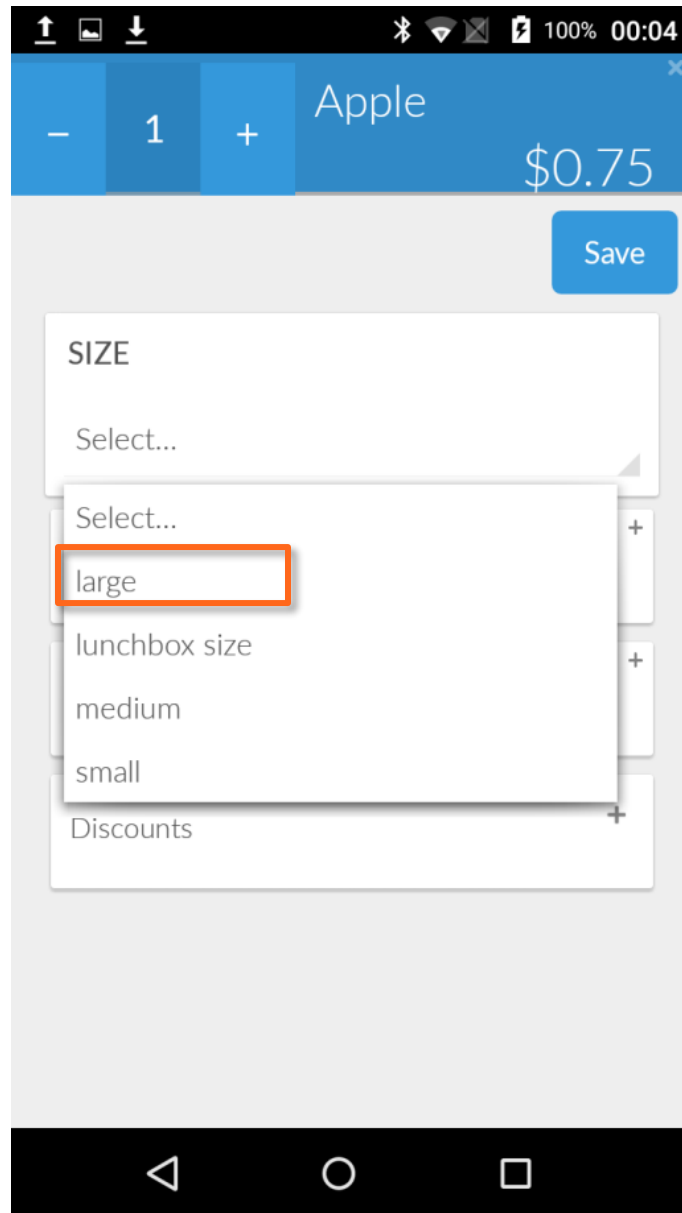
1. Tap Products.
2. Select the desired product from your product list.



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

User Guide

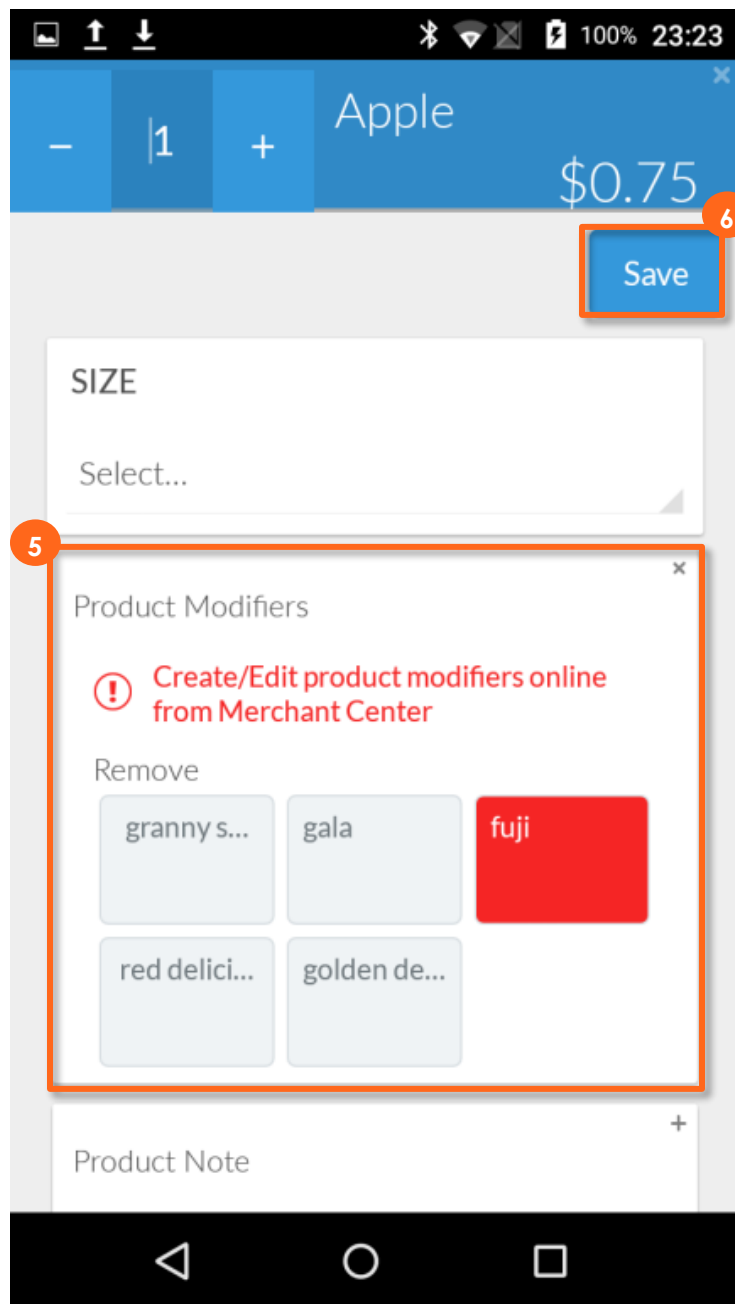
4. Select the desired Product Variations from the dropdown that displays.



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

User Guide

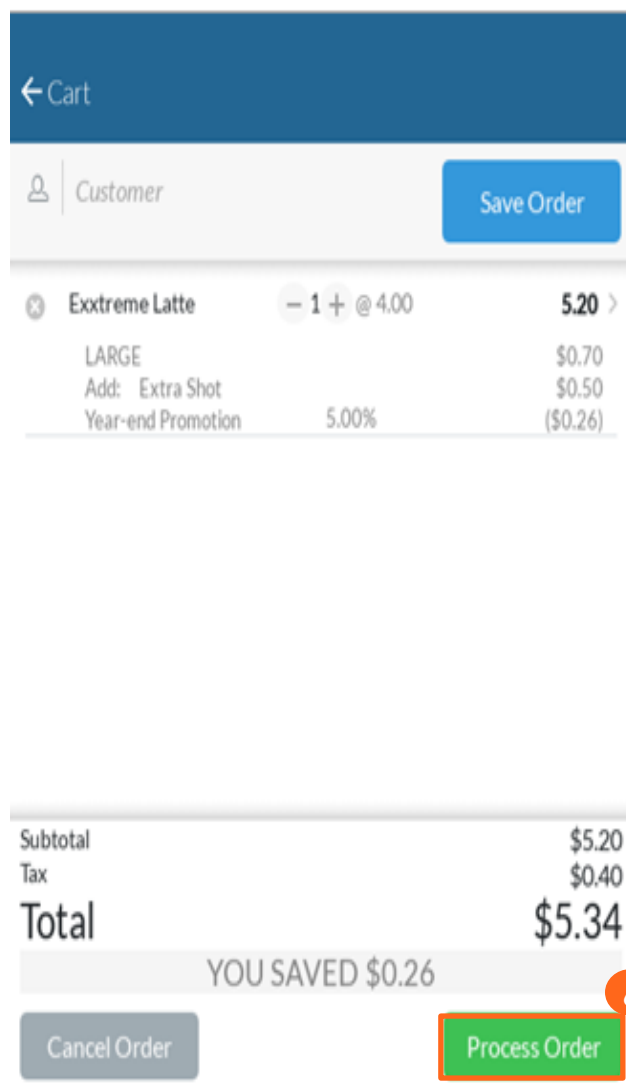
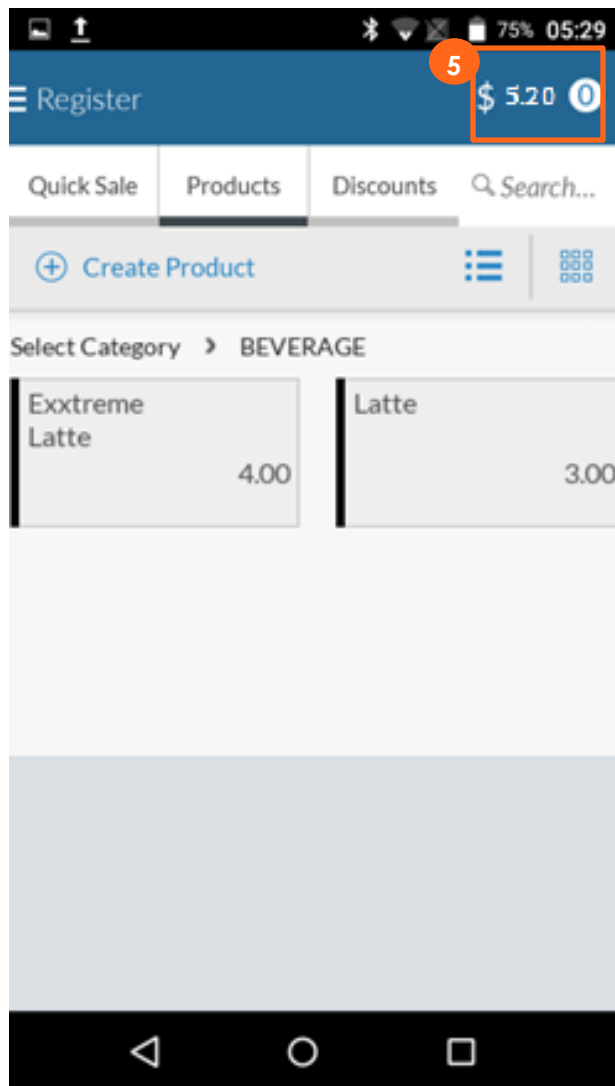
5. Select any desired Product Modifiers by tapping them to select or unselect them. Modifiers show as red when they are currently selected.
6. Tap **Save**.



User Guide

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

8. Tap Process Order.

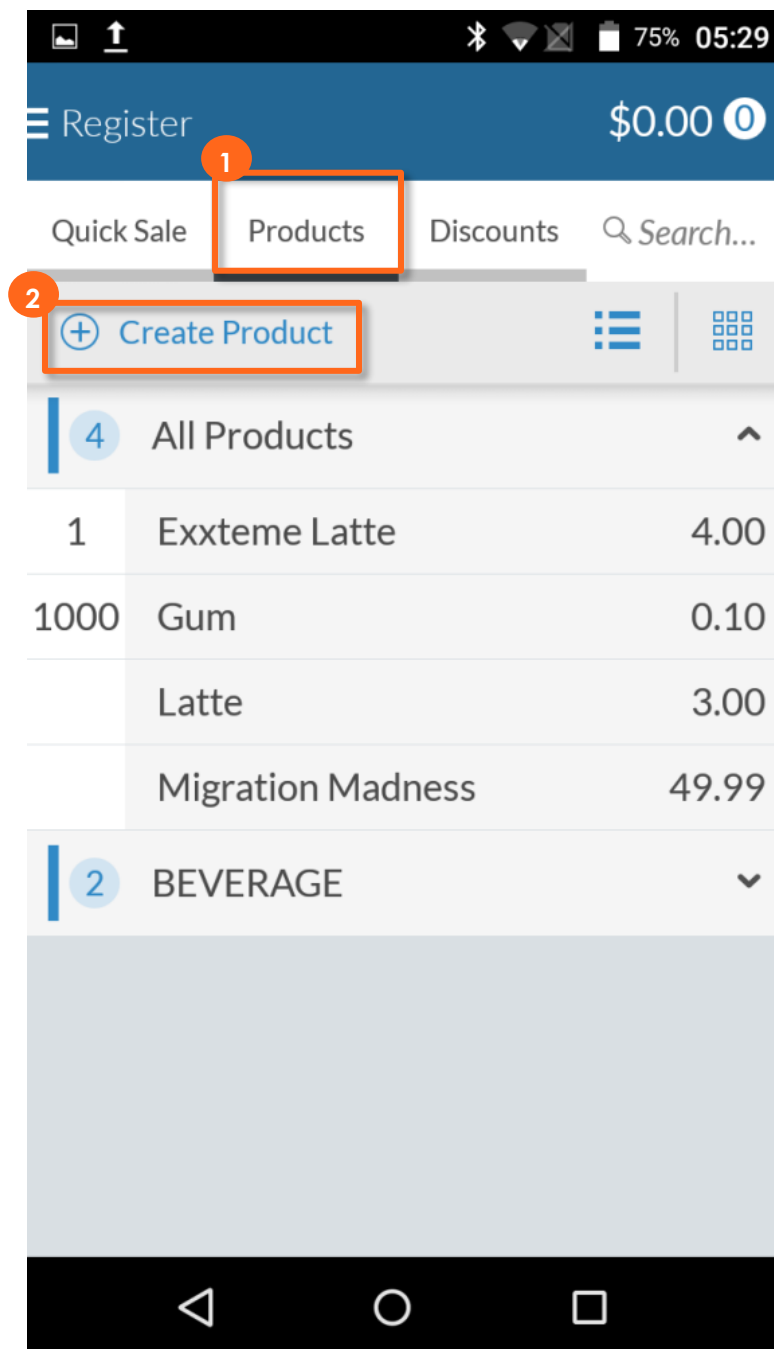


User Guide

Begin a Transaction by Creating a Product

To begin a transaction by creating a product:

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



User Guide

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.

Product Name \$0.00

Complete the sections below to create or edit a product.

4 Save

3

General Product Info

Price

Enter Product Name \$0.00

Active Product ☒

Track Inventory ☐

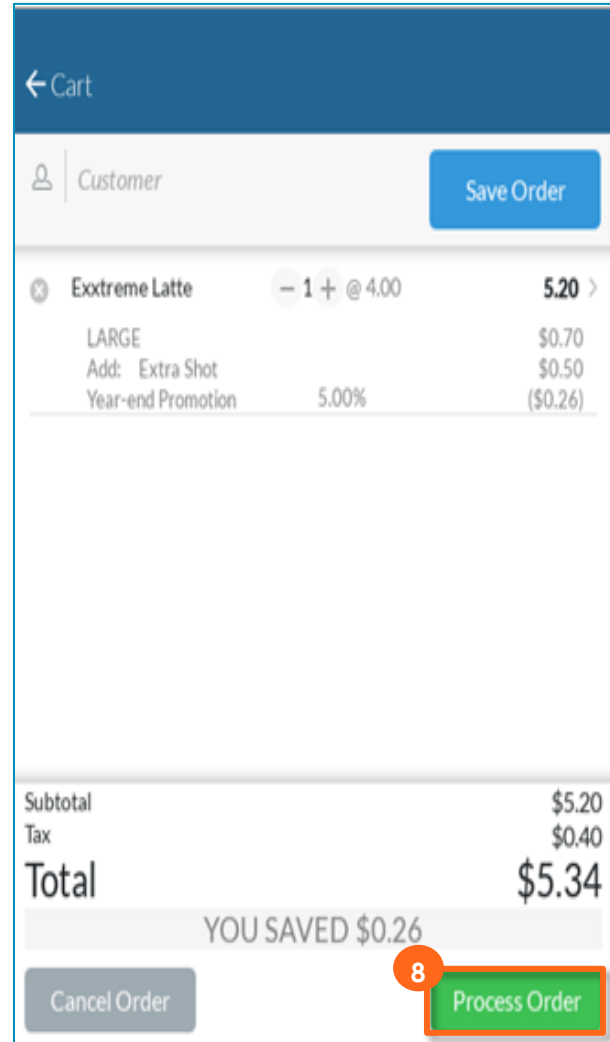
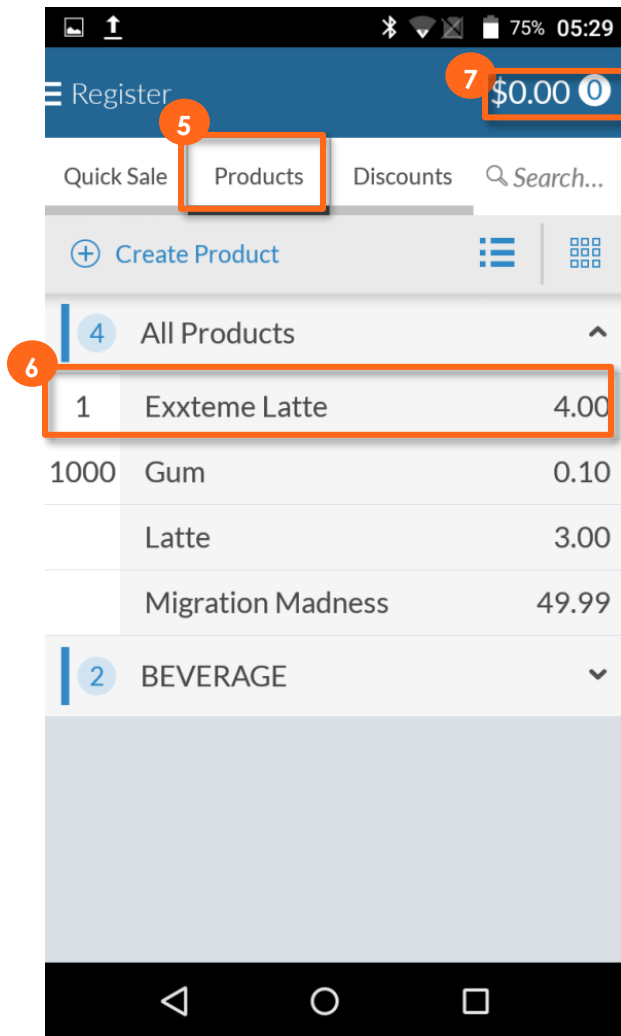
Quantity Code/SKU

UPC

Description

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**.



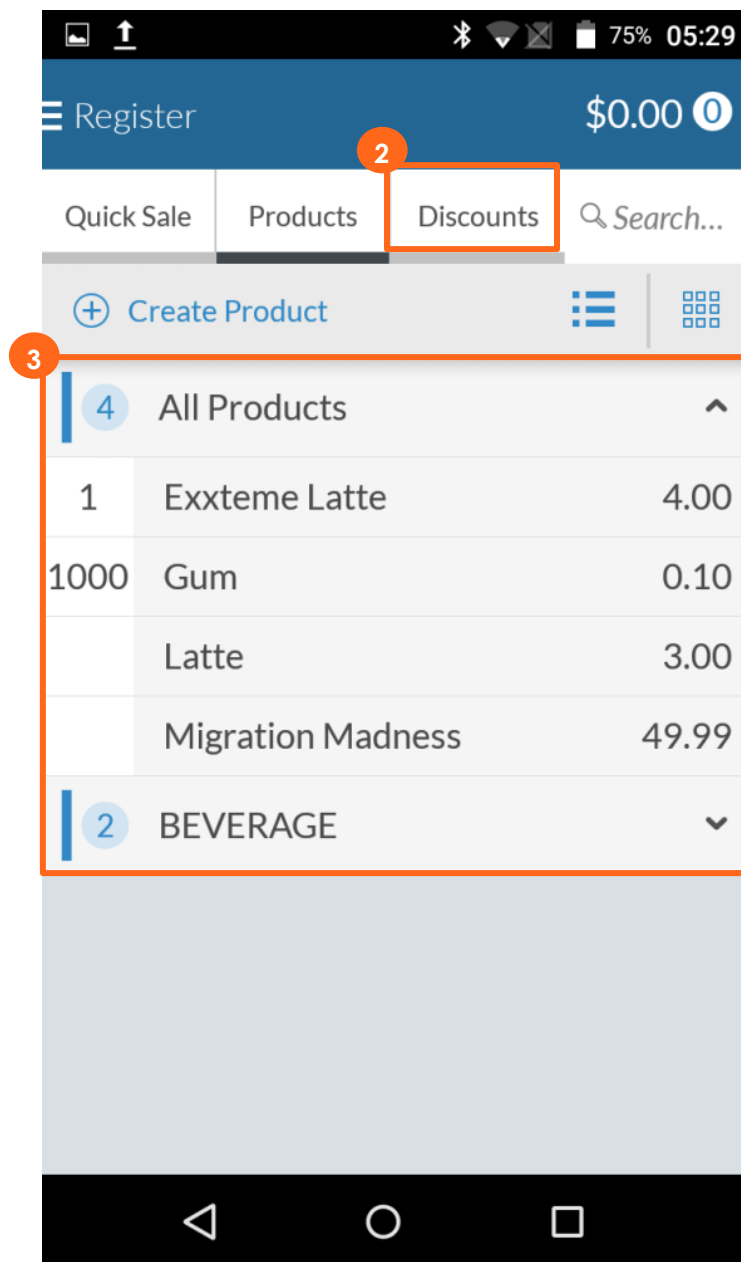
User Guide

Discounts

Add a Discount to an Entire Order

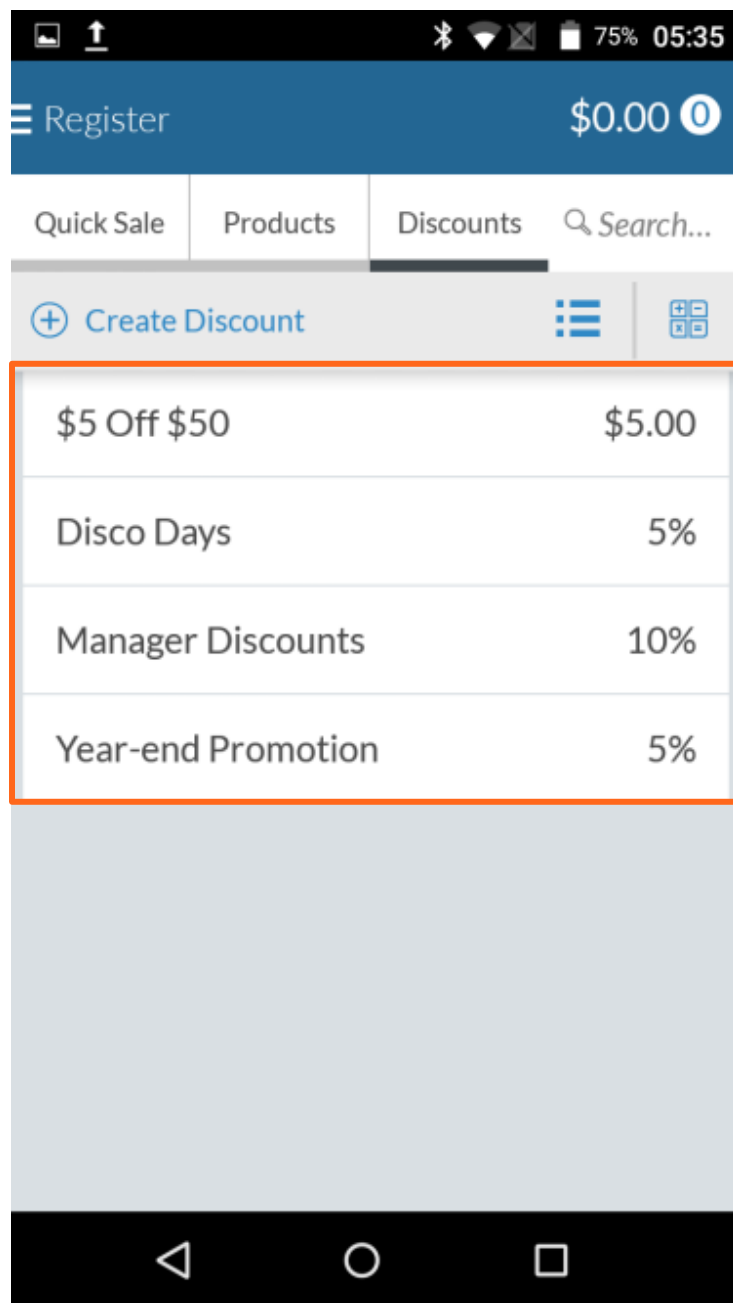
To add one or more discounts to an entire order during a transaction:

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



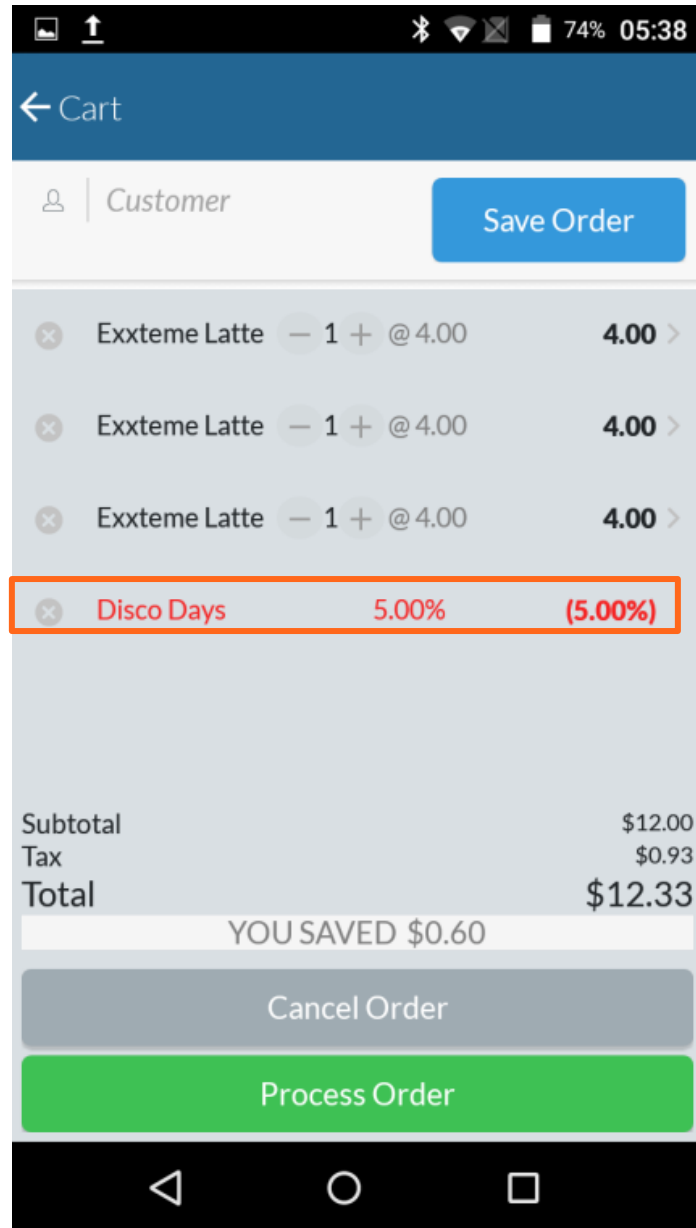
User Guide

3. Tap the discount you wish to apply.



User Guide

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.



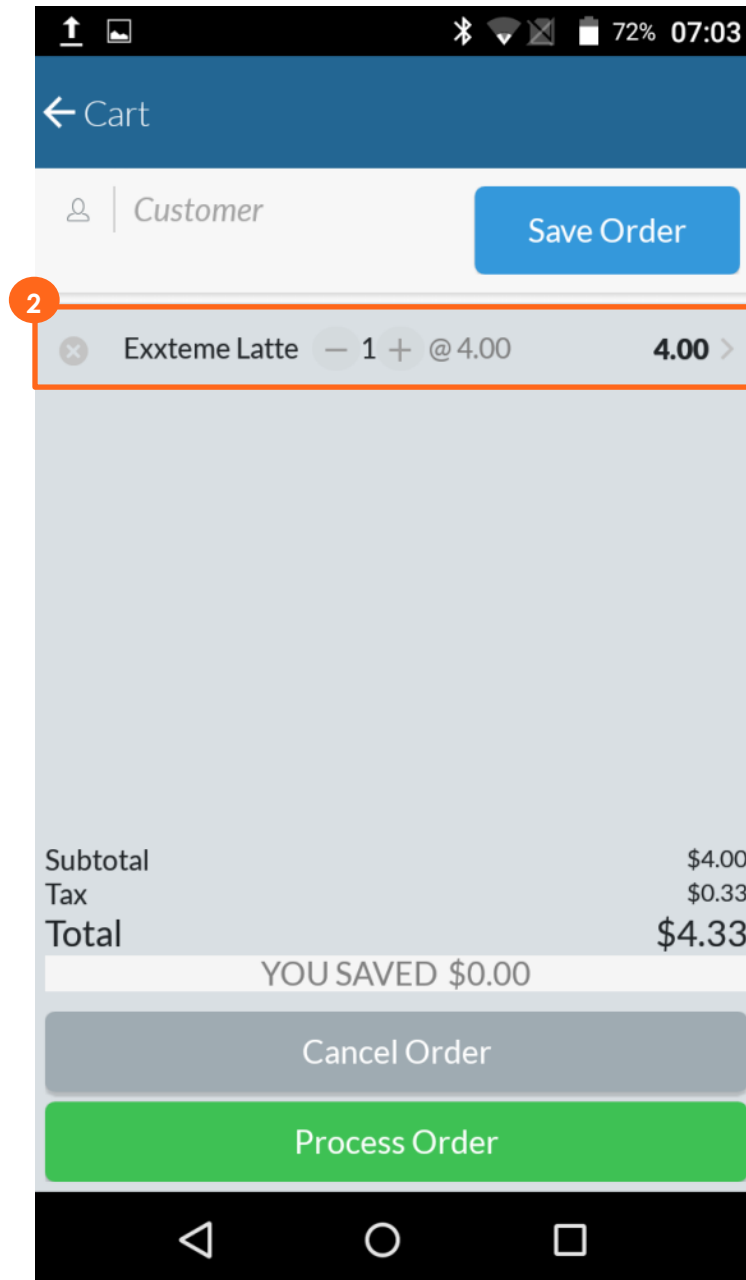
Note: Individual discounts may only be applied once to an order or a product; however, the same discount may be applied twice if it is applied to an individual product and the entire order.

User Guide

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.

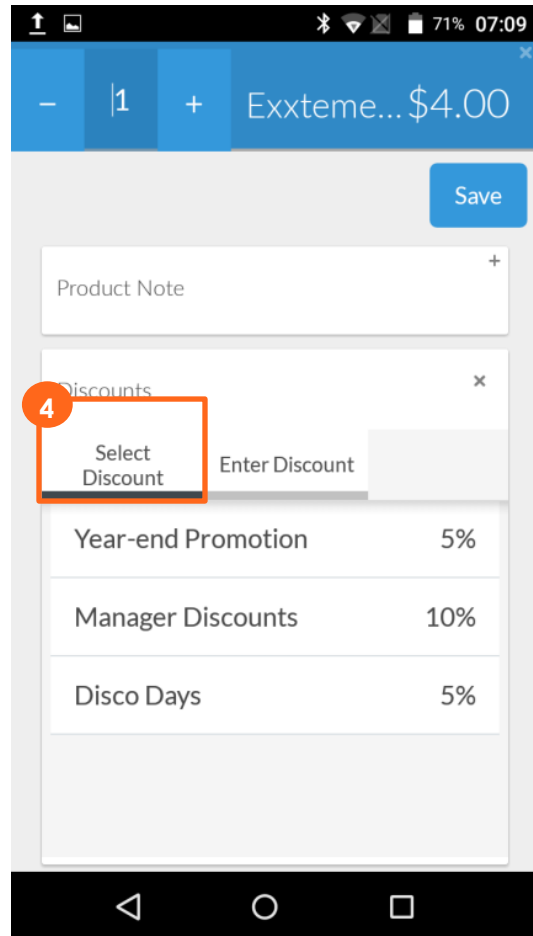
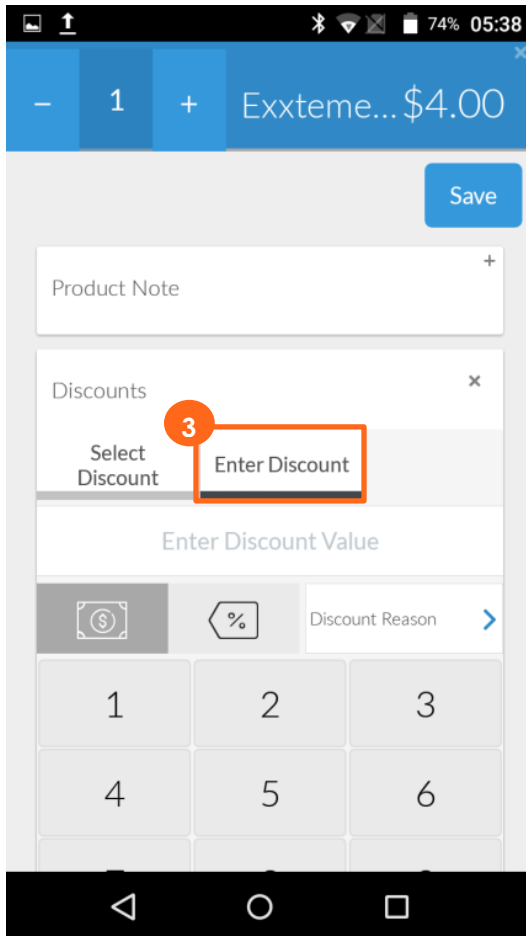


User Guide

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.

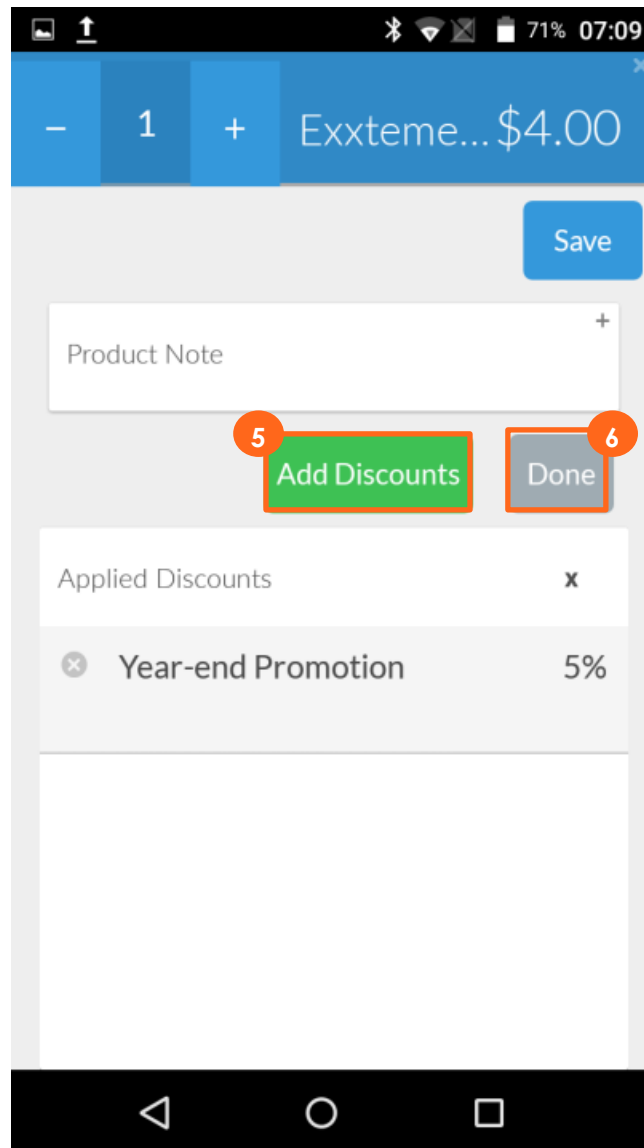


User Guide

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

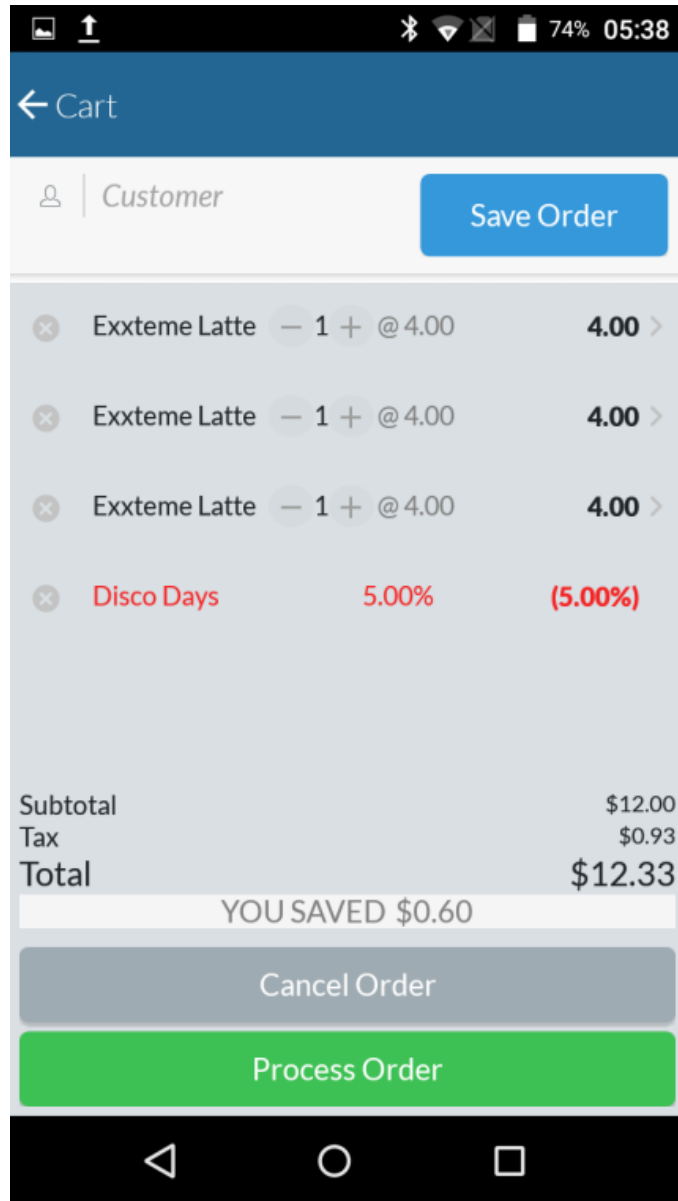
OR

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



User Guide

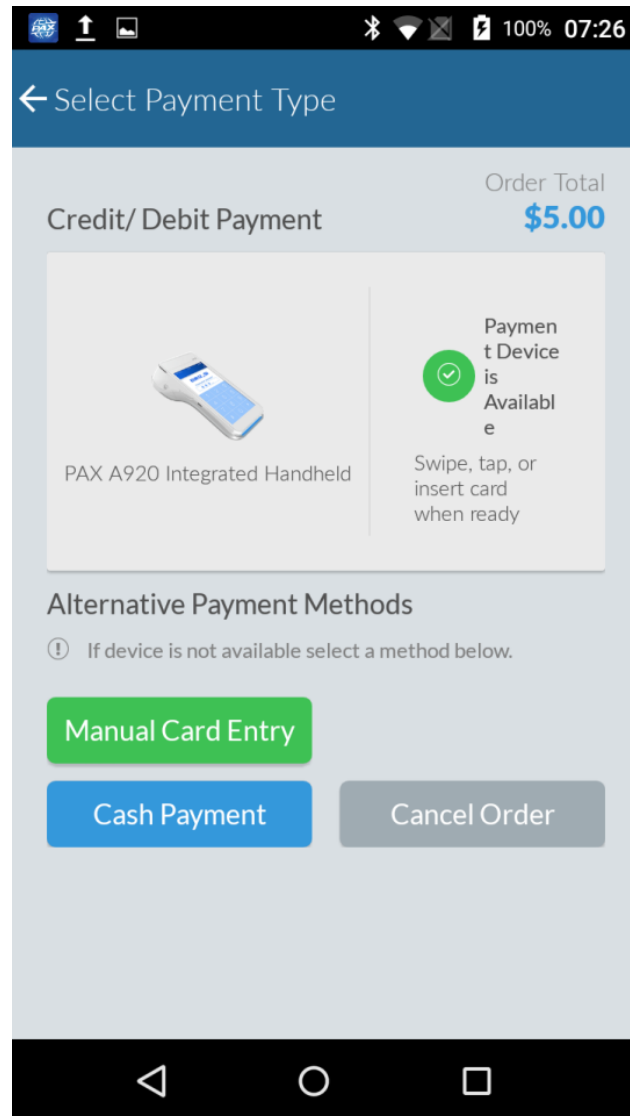
7. Review the applied discounts and add additional discounts by repeating this process. Once you are satisfied with your selections, proceed as you would with a regular transaction.



User Guide

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.



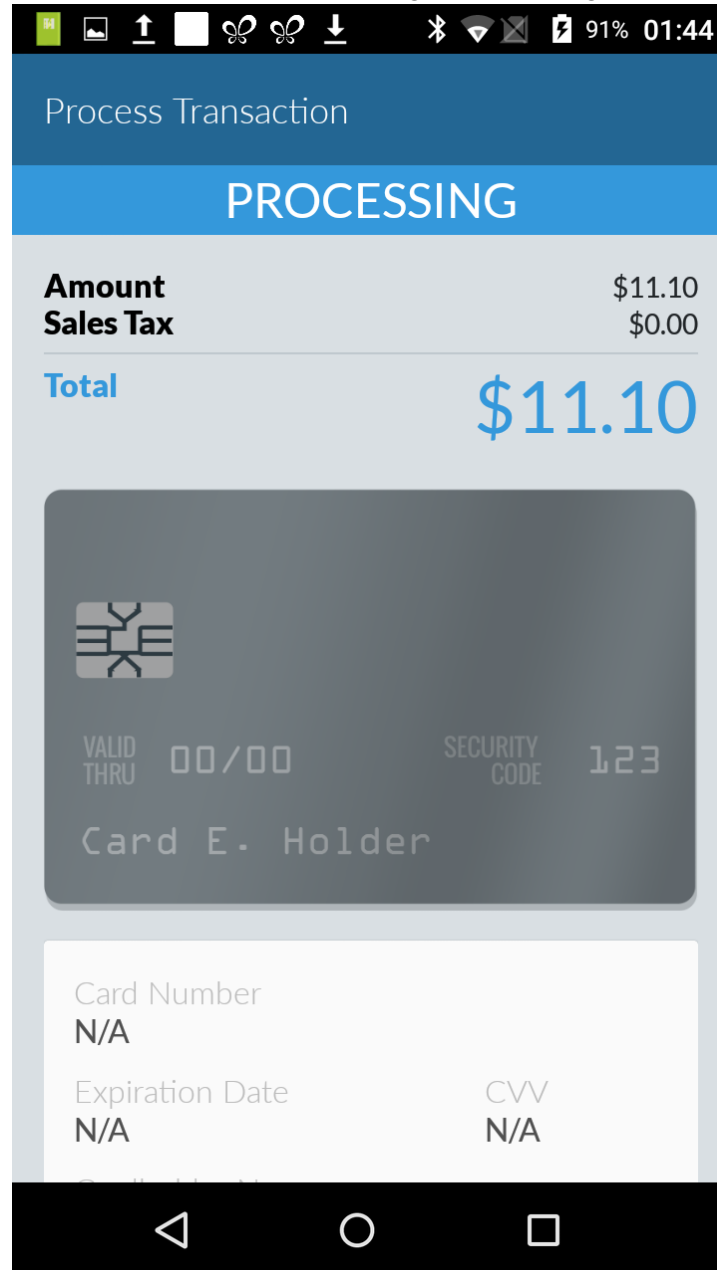
There are three ways you can process a payment:

- 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.

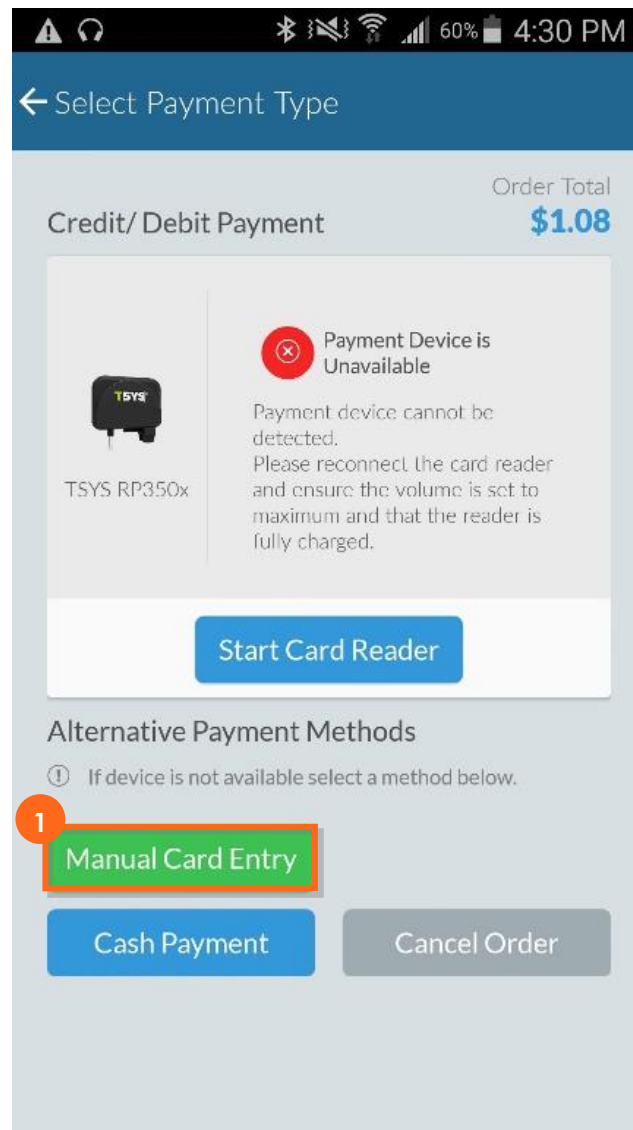


User Guide

Manual Card Entry

To process an order using manual card entry:

1. Tap **Manual Card Entry**.



User Guide

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**.

← Manual Transaction

VALID THRU 00/00 SECURITY CODE 123

Card E. Holder

2

Card Number

Enter Card Number

Expiration Date MM / YY

CVV CVV

☐ CVV Illegible

☐ CVV Not Present

Cardholder Name

Enter Cardholder Name

☐ Cardholder not prese...

Enter Address Number

Zip Code

Enter zip code

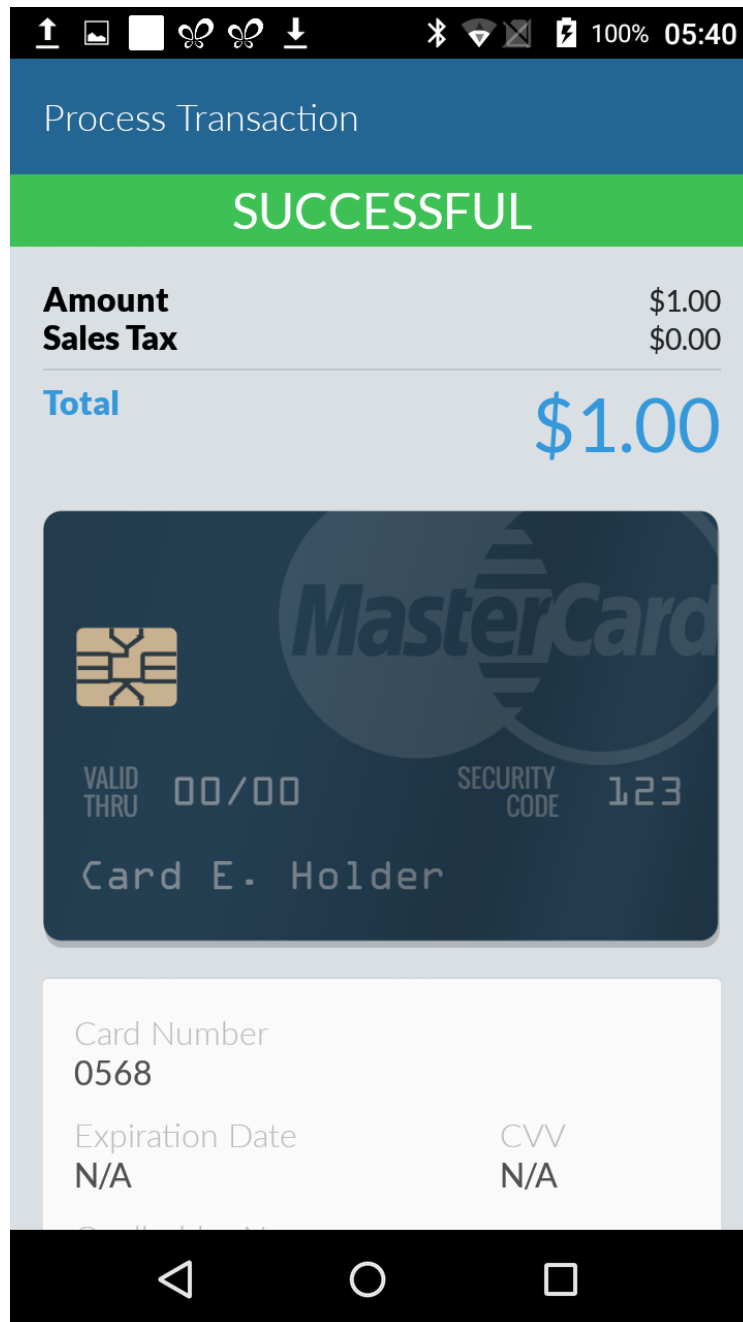
3

Process Order

Previous Cancel Order

User Guide

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.

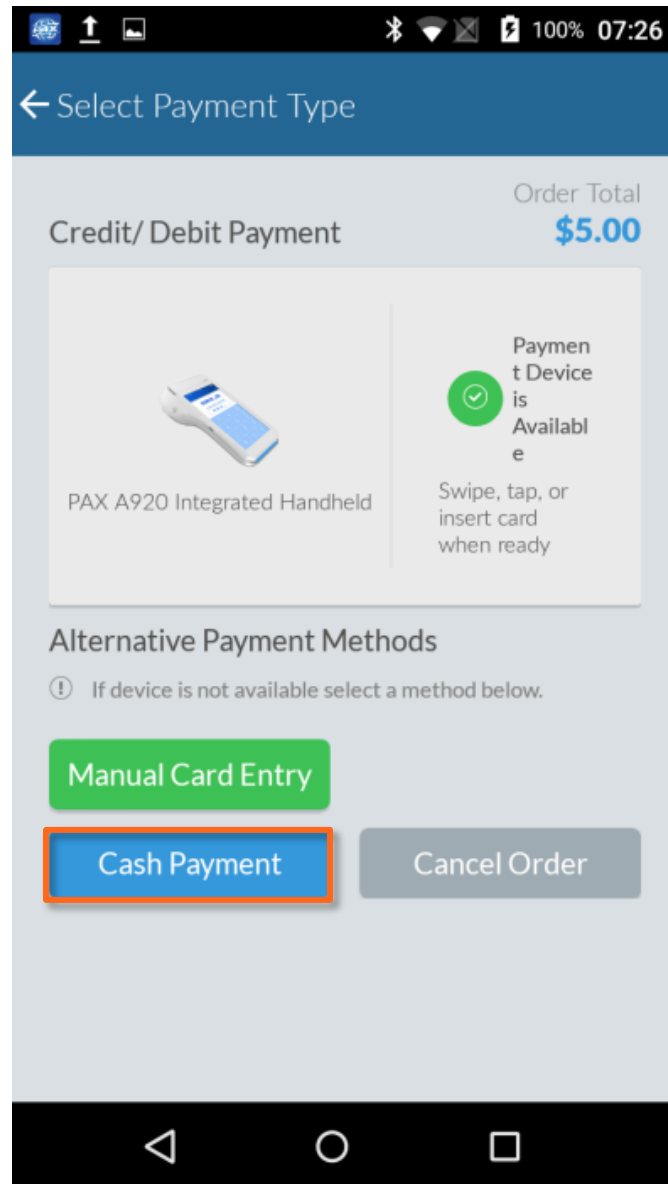


User Guide

Cash Transaction

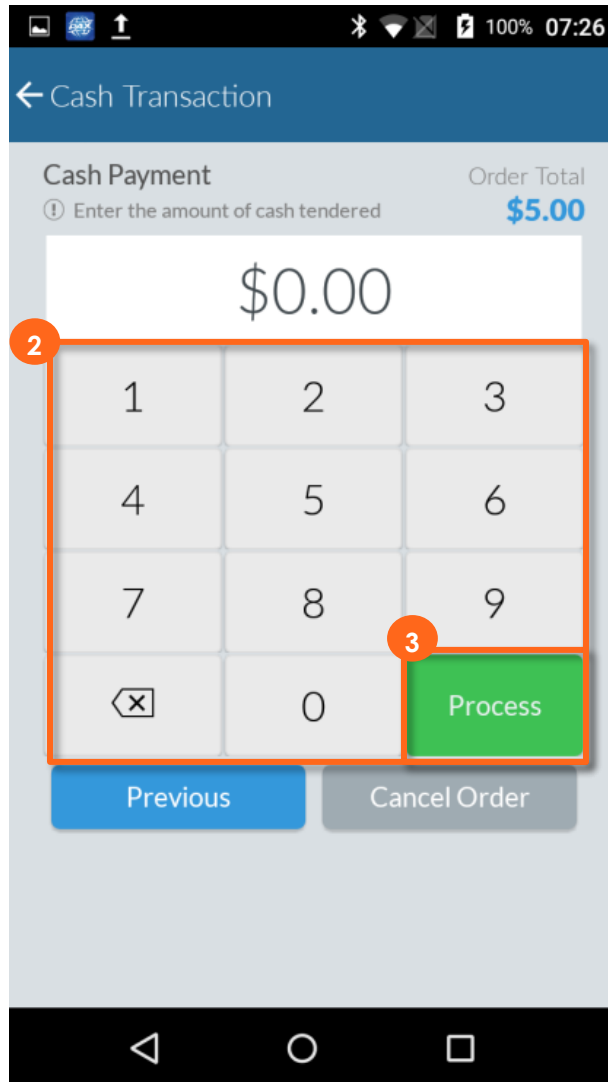
To process a cash transaction:

1. Tap **Cash Payment**.



User Guide

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



User Guide

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

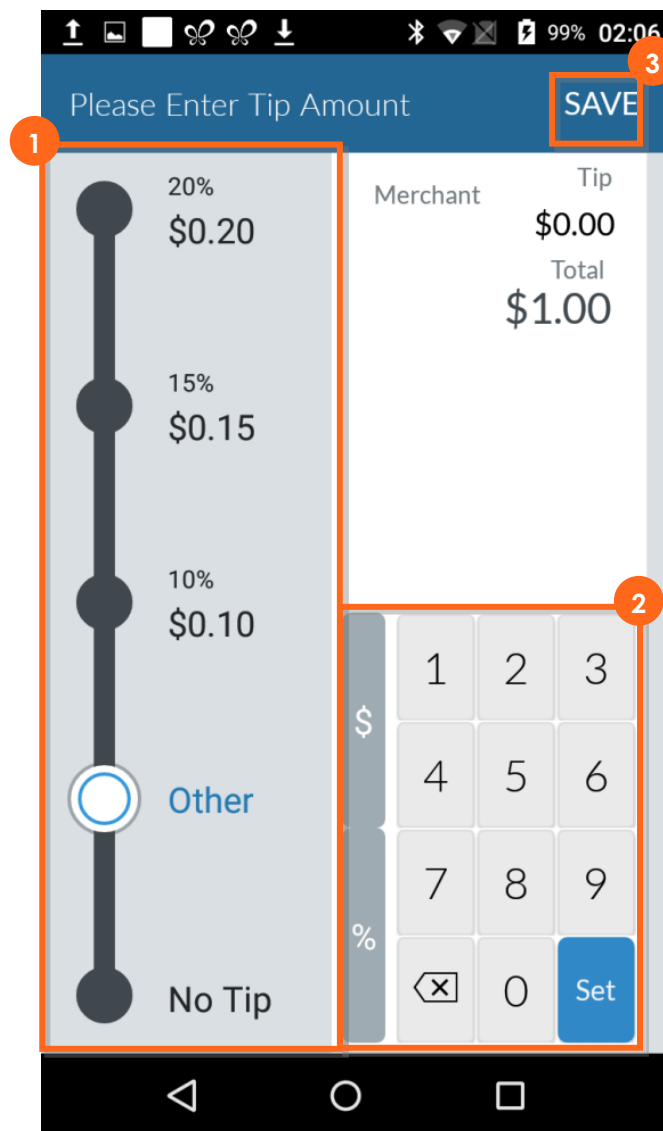
The screenshot shows a mobile application interface for a cash transaction. At the top, a status bar displays various icons and the time 05:43. Below this, a dark blue header bar contains a back arrow and the text 'Cash Transaction'. The main content area has a dark grey background. On the left, it says 'Cash Payment' with a warning icon and the instruction 'Enter the amount of cash tendered'. On the right, it shows 'Order Total' as '\$10.99'. Below this, a white box titled 'Confirm Cash Payment Amount' (with a close 'x' icon) contains the following information: 'Amount Tendered \$20.00', 'Order Total \$10.99', and 'Change Due \$9.01' (where '\$9.01' is in large blue text). At the bottom of this white box are two buttons: 'Change Amount' (blue) and 'Confirm' (green, highlighted with a red border). Below the white box, there are two buttons: 'Previous' (dark blue) and 'Cancel Order' (grey). The bottom of the screen shows a standard Android navigation bar with back, home, and recent apps icons.

Field	Value
Amount Tendered	\$20.00
Order Total	\$10.99
Change Due	\$9.01

User Guide

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.

User Guide

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.

The screenshot shows a mobile application interface for a 'Confirmation' screen. At the top, a status bar shows 92% battery and 3:37 PM. The screen has a blue header with the word 'Confirmation'. Below this is a 'Receipt' section with a warning icon and the text 'Order Complete! Details available below.' A smiley face icon and the text 'Thank you for shopping with us!' are also present. The receipt details are as follows:

Subtotal	\$5.00
Tax	\$0.46
Total	\$5.46
Amount Tendered	\$6.00
Change Due	\$0.54

Below the receipt details, the following transaction information is listed:

Transaction ID	
Invoice Number	n/a
Transaction Date	2017-10-18
Payment Type	Cash

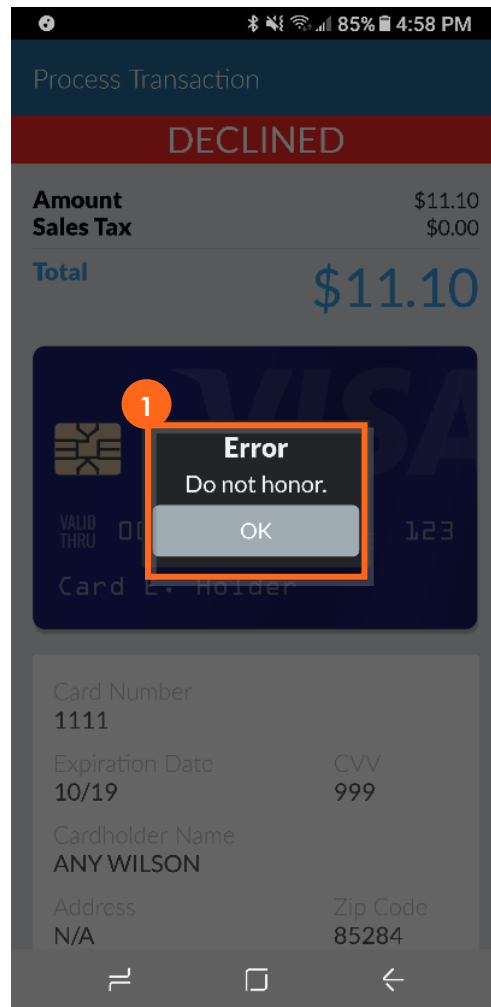
At the bottom of the receipt section, there is an 'Email Receipt' section with a text input field containing 'example@email.com' and an email icon. Below this are two buttons: 'Print Receipt' (highlighted with a red circle and the number 1) and 'Done' (highlighted with a red circle and the number 3). The email input field is also highlighted with a red circle and the number 2.

User Guide

Declined Transaction

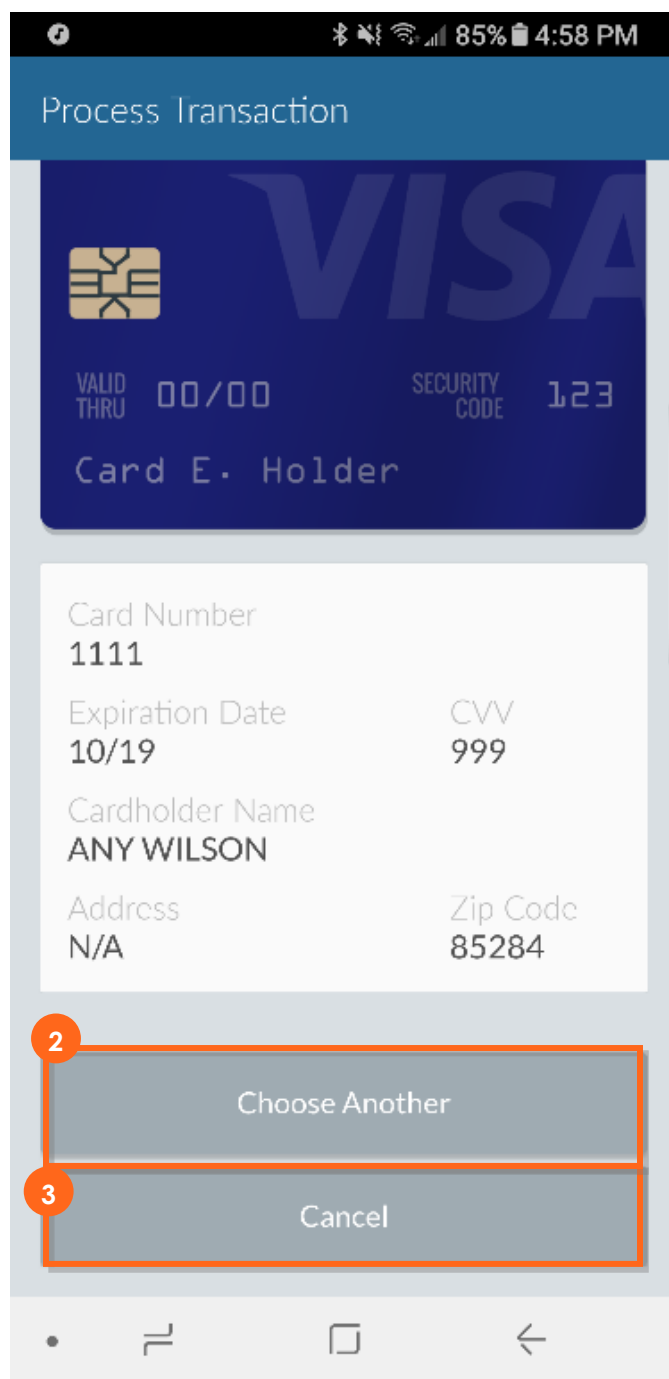
When a credit card is declined, you will have the option to go back to the Select Payment Type screen or cancel the order.

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



User Guide

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.



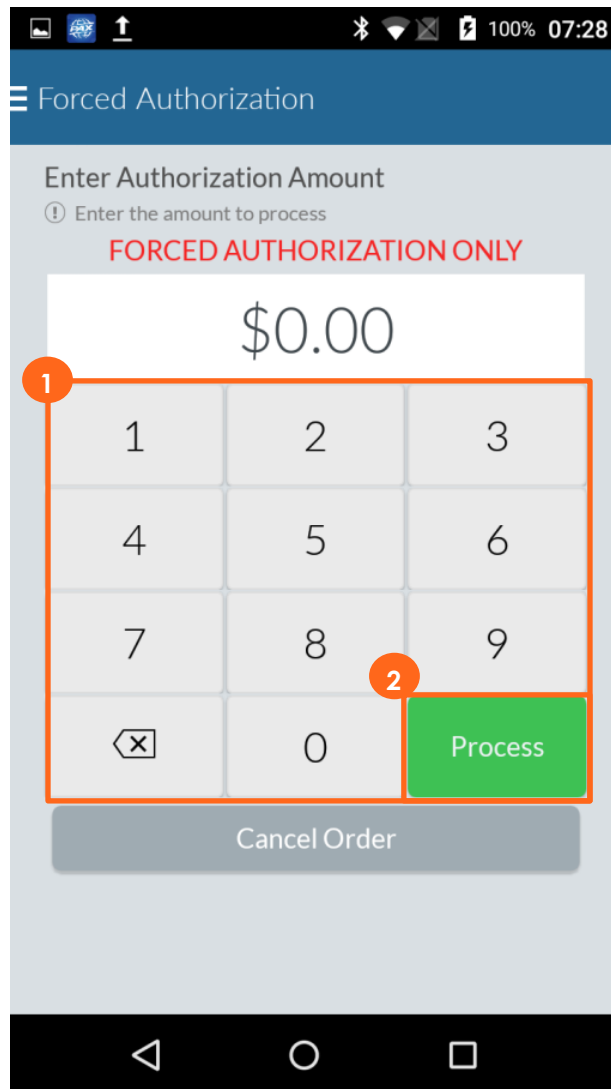
User Guide

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**.



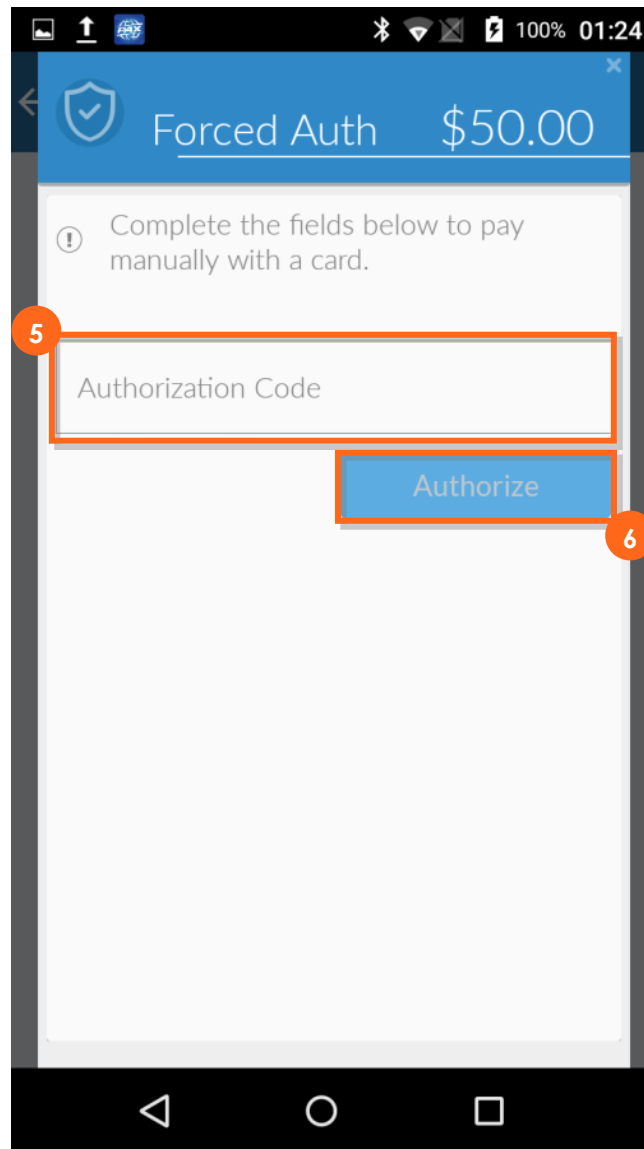
User Guide

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

The screenshot displays the 'Manual Transaction' screen of a mobile payment application. At the top, there is a blue header with a back arrow and the text 'Manual Transaction'. Below the header, a grey card graphic is shown with the following details: 'VALID THRU 00/00', 'SECURITY CODE 123', and 'Card E. Holder'. A red circle with the number '3' is positioned next to the card information section. Below the card graphic, there is a form with several input fields: 'Card Number' (with placeholder text 'Enter Card Number'), 'Expiration Date' (with placeholder text 'MM / YY'), 'CVV' (with placeholder text 'CVV'), 'Cardholder Name' (with placeholder text 'Enter Cardholder Name'), 'Cardholder not prese...' (with a checkbox), 'Enter Address Number', 'Zip Code' (with placeholder text 'Enter zip code'), and a green 'Process Order' button. A red circle with the number '4' is positioned next to the 'Process Order' button. At the bottom of the screen, there are two buttons: 'Previous' (blue) and 'Cancel Order' (grey). The bottom of the screen also shows the standard Android navigation bar with back, home, and recent apps icons.

User Guide

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.

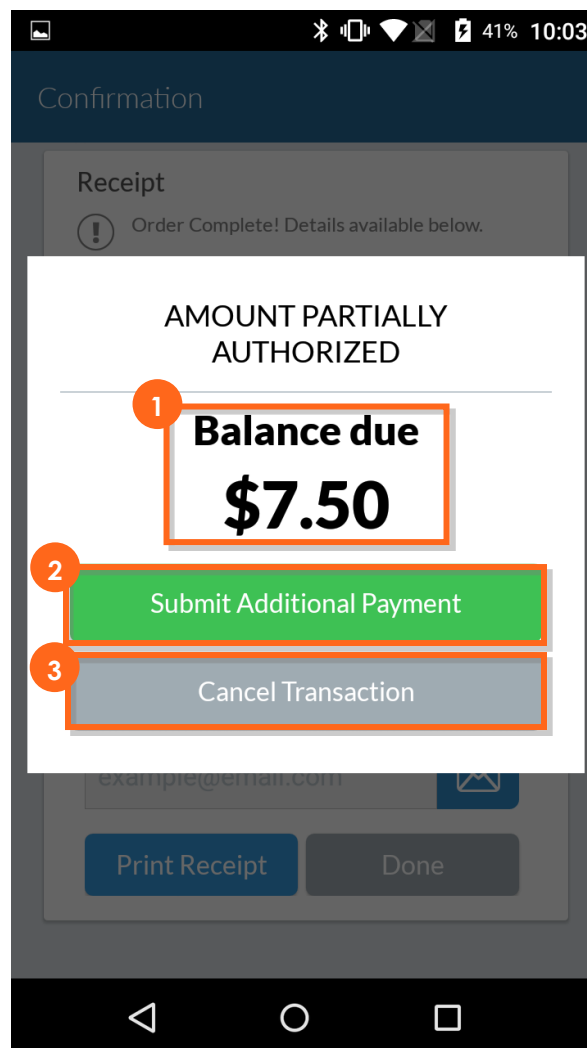


User Guide

Partial Authorizations

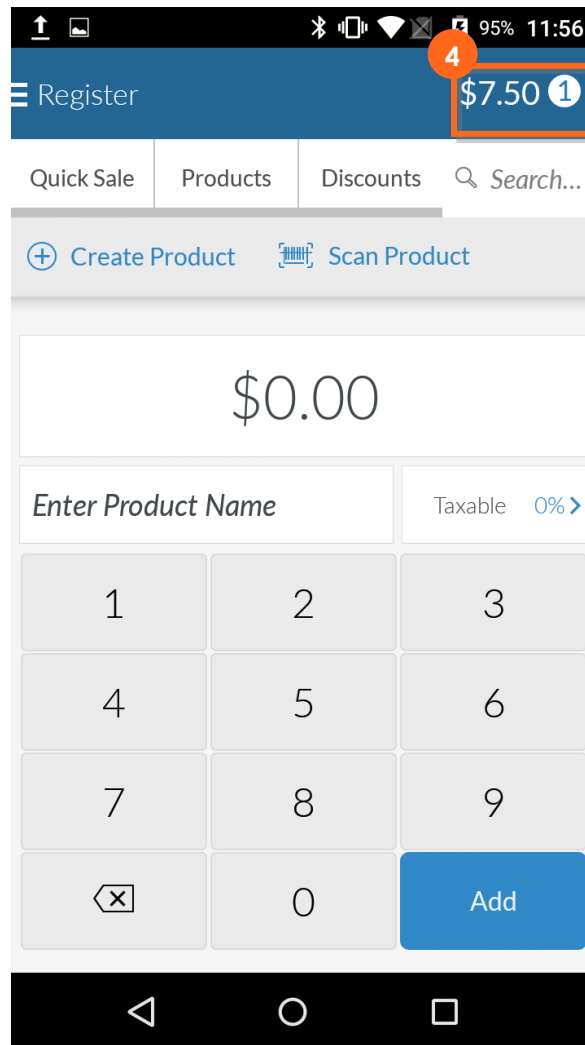
When a customer presents a payment type that does not have sufficient funds to cover their purchase, instead of a decline, you may be given the option to accept a partially authorized transaction.

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.



User Guide

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.



User Guide

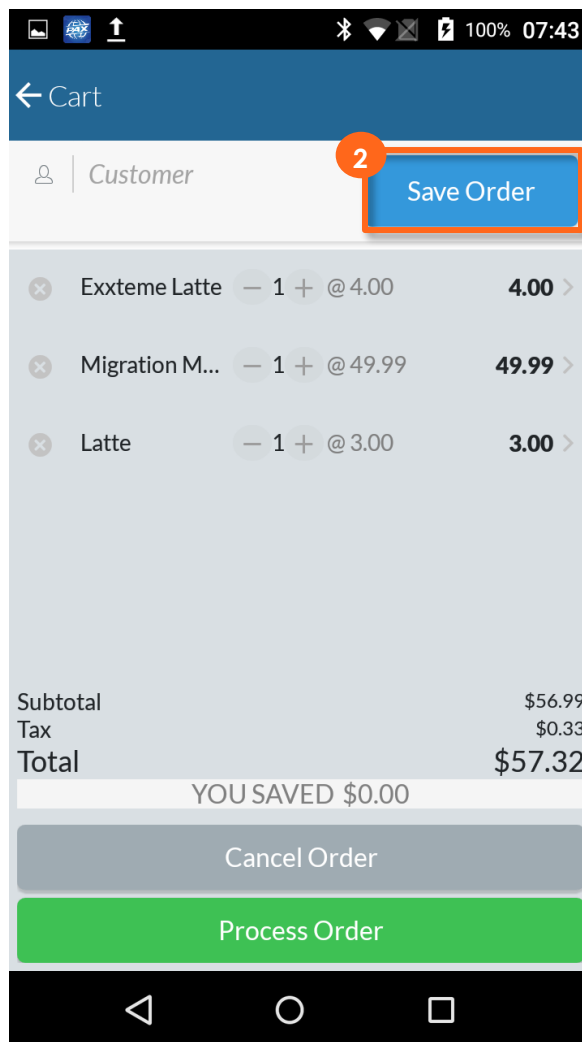
Open Orders

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**.



User Guide

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

Save Order \$57.32

3 Complete the sections below to save an order.

4 Save Order

Order Details

Customer

Select a Customer >

Pick-Up Date Pick-Up Time

Select a date > Select a time >

Print Order Ticket Send job to Order ticket Printer

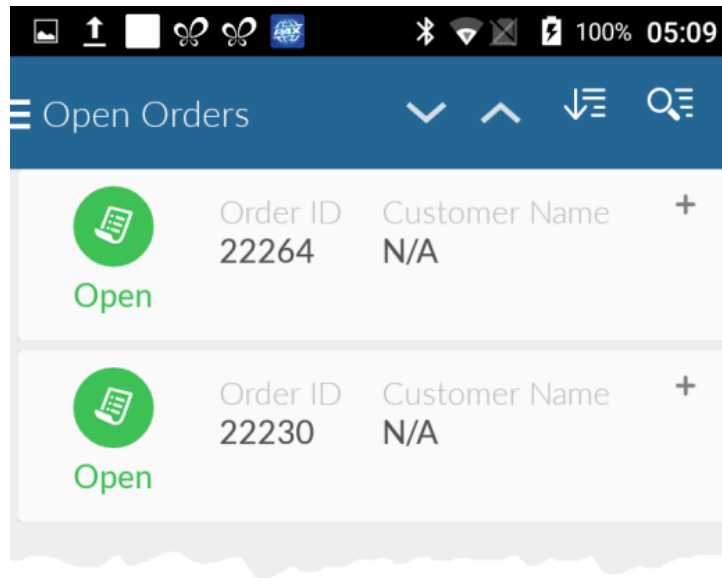
Order Notes

User Guide

Process an Open Order

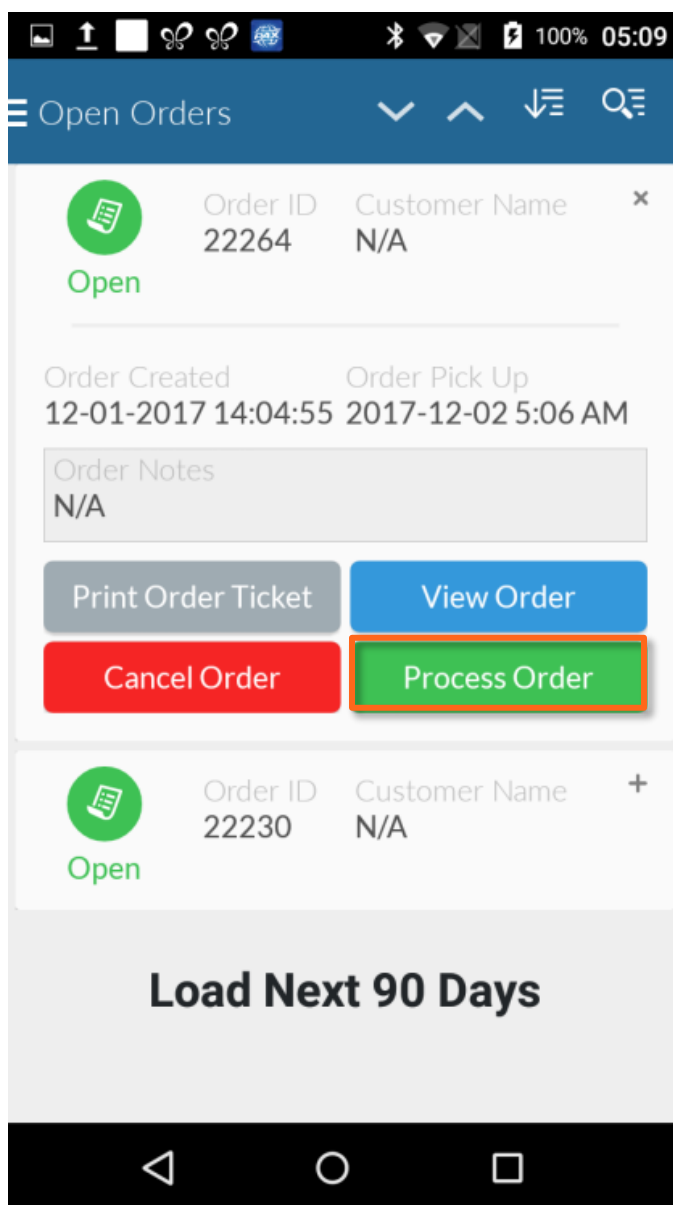
To process an open order:

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



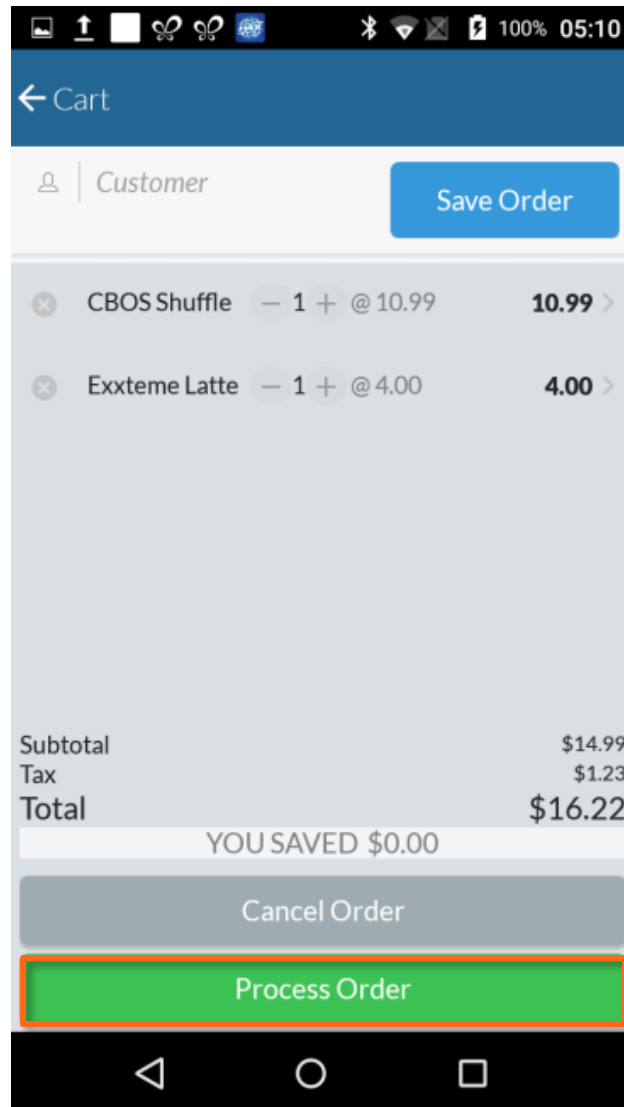
User Guide

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



User Guide

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.



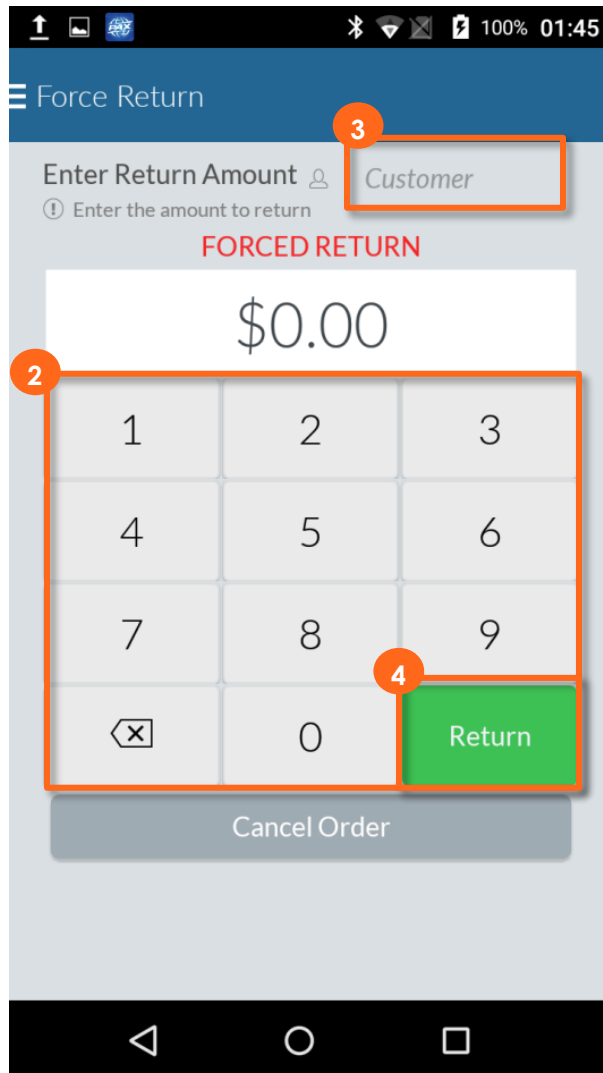
User Guide

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.

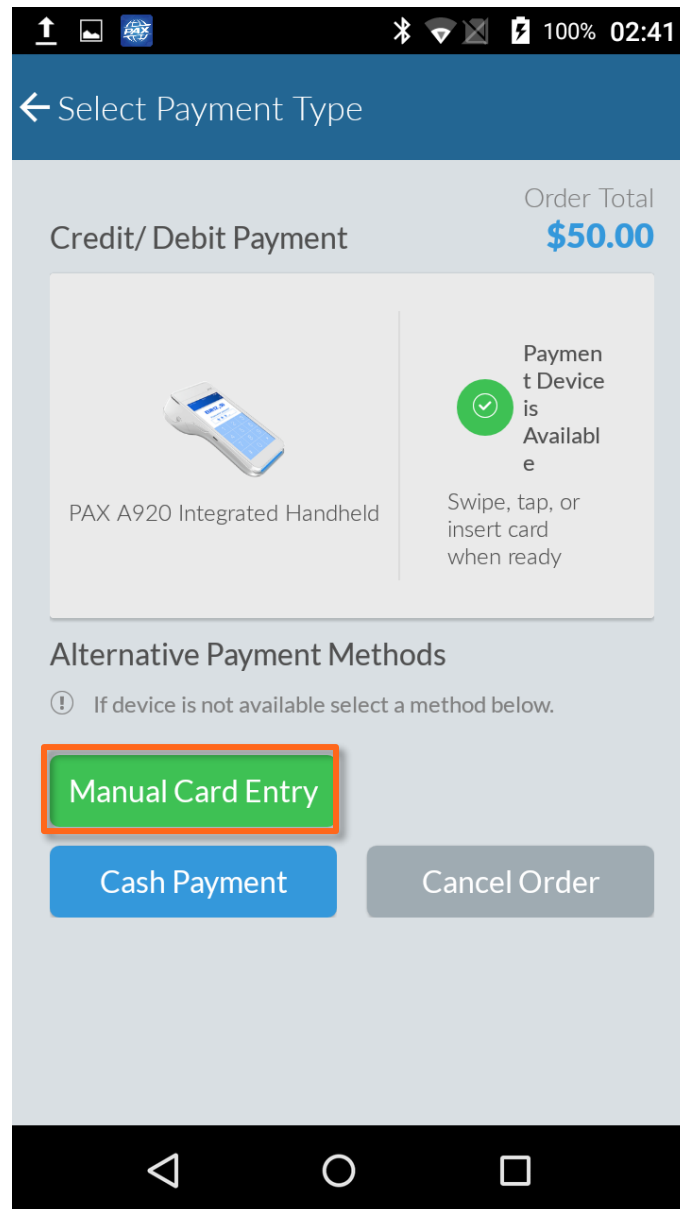
To force a return:

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**.



User Guide

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.



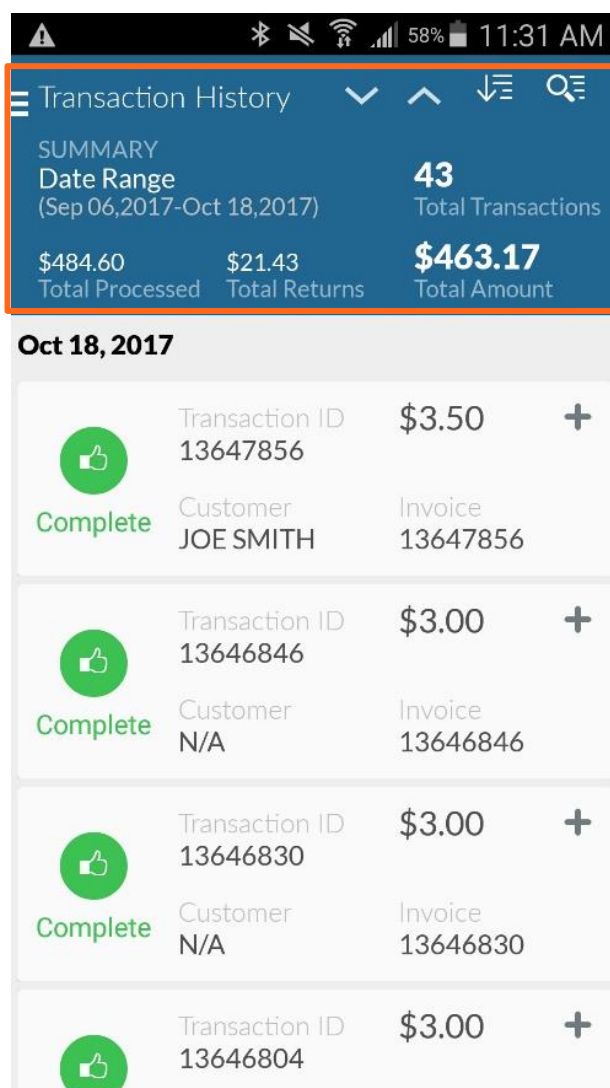
User Guide





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.

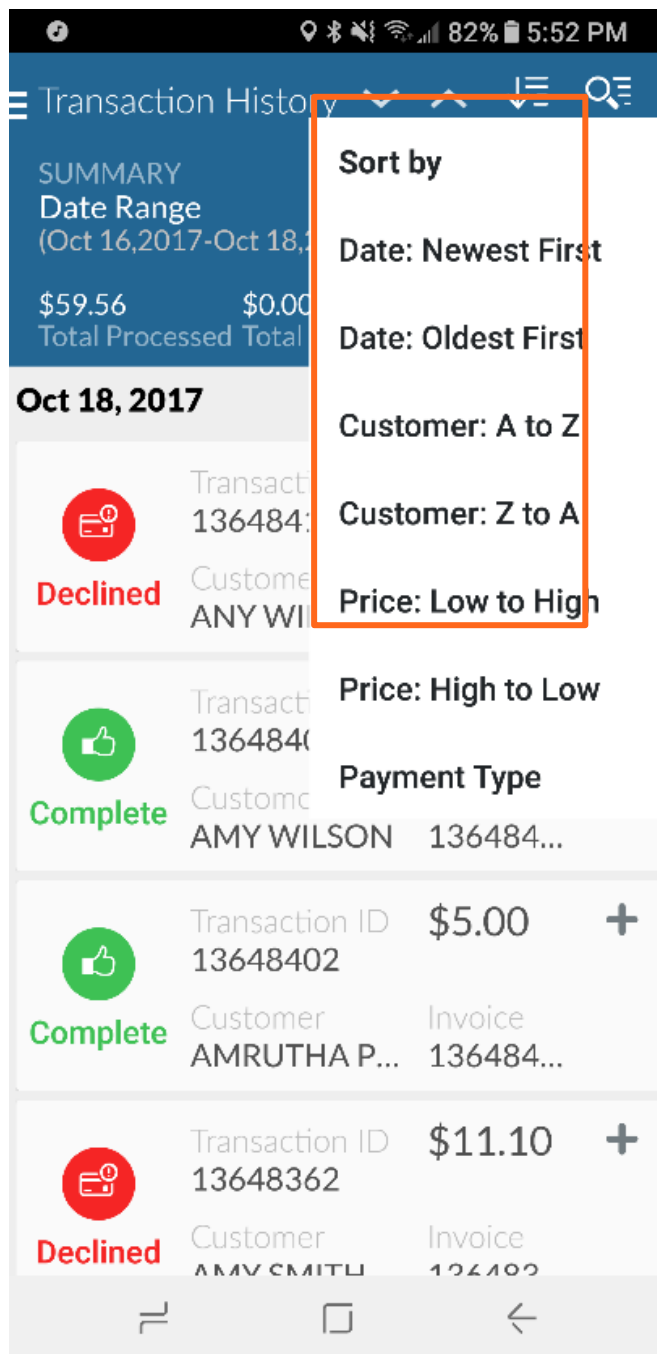


Transaction History			
SUMMARY			
Date Range (Sep 06, 2017-Oct 18, 2017)		43	Total Transactions
\$484.60	\$21.43	\$463.17	
Total Processed	Total Returns	Total Amount	
Oct 18, 2017			
 Complete	Transaction ID 13647856	\$3.50	+
	Customer JOE SMITH	Invoice 13647856	
 Complete	Transaction ID 13646846	\$3.00	+
	Customer N/A	Invoice 13646846	
 Complete	Transaction ID 13646830	\$3.00	+
	Customer N/A	Invoice 13646830	
 Complete	Transaction ID 13646804	\$3.00	+

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.

The screenshot displays the 'Transaction History' screen of a mobile application. At the top, there's a status bar with icons for Bluetooth, signal strength, and battery level (82%) at 5:52 PM. Below the title 'Transaction History', there are navigation icons: a menu, a dropdown arrow, an up arrow, a list icon, and a search icon. A 'SEARCH / FILTER OPTIONS' section is highlighted with an orange border. It includes a 'FILTER' button and a 'CLEAR ALL' button. Below this, a note states: 'Complete at least one option to filter results.' The filtering options are organized into three columns: 'TransID, Card # or Cust', 'Status', and 'Payment Type'. Below these, there are 'Date Range' and 'Price Range' sections. The 'Date Range' section has 'Start Date' and 'End Date' fields with 'TO' between them. The 'Price Range' section has 'Min Pric' and 'Max Pric' fields with 'TO' between them. Below the filtering section, the date 'Oct 18, 2017' is displayed. Three transaction entries are listed, each with a status icon and label, transaction ID, amount, and a plus icon for details. The first entry is 'Declined' with a red card icon, Transaction ID 13648410, and amount \$11.10. The second and third entries are 'Complete' with green thumbs-up icons, Transaction IDs 13648406 and 13648402, and amounts \$5.55 and \$5.00 respectively. Each entry also shows 'Customer' and 'Invoice' details. At the bottom, there's a navigation bar with icons for home, list, details, and back.

TransID, Card # or Cust	Status	Payment Type
Date Range	Price Range	
Start Date TO End Date	Min Pric TO Max Pric	

Oct 18, 2017

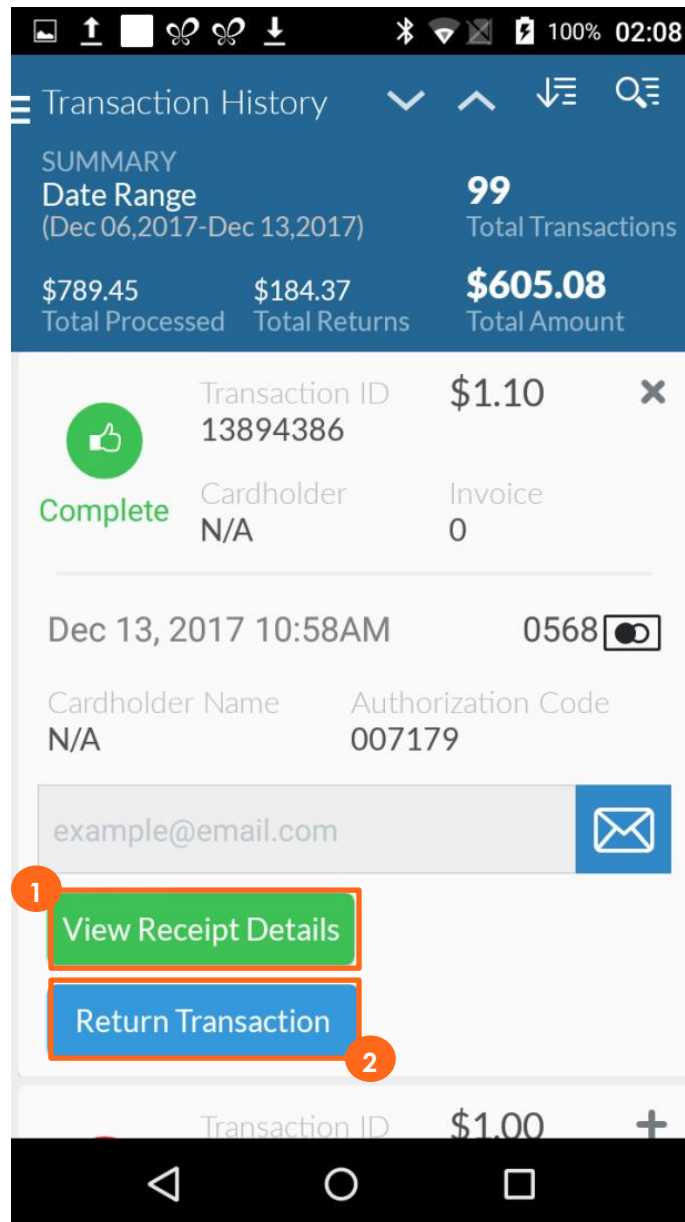
Status	Transaction ID	Amount	Customer	Invoice
Declined	13648410	\$11.10	ANY WILSON	136484...
Complete	13648406	\$5.55	AMY WILSON	136484...
Complete	13648402	\$5.00		

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).



User Guide

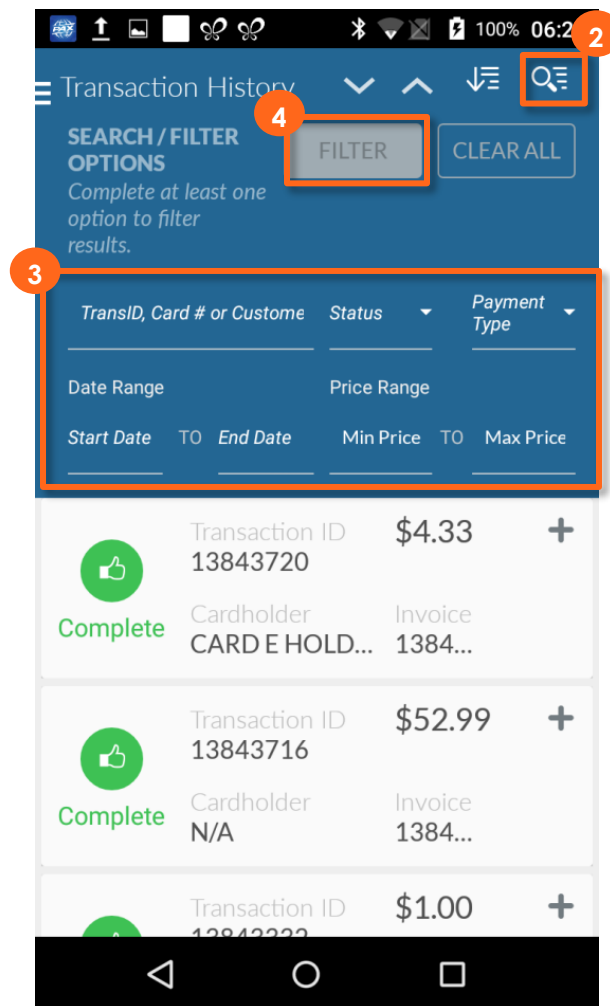
Process a Return from the Transaction History

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

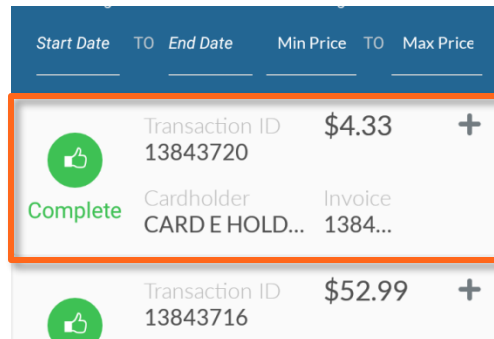
To bring up an order for a return using transaction history:

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**.



User Guide

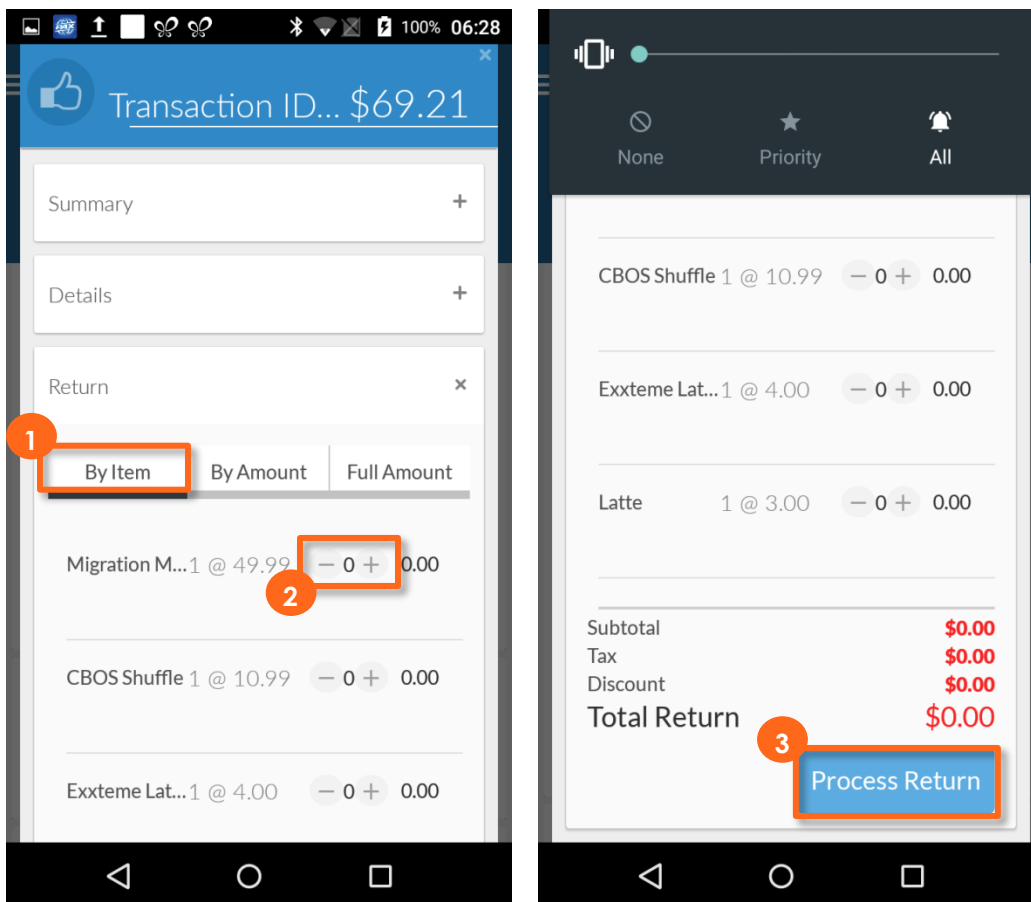
5. Tap the transaction you wish to view.



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**.

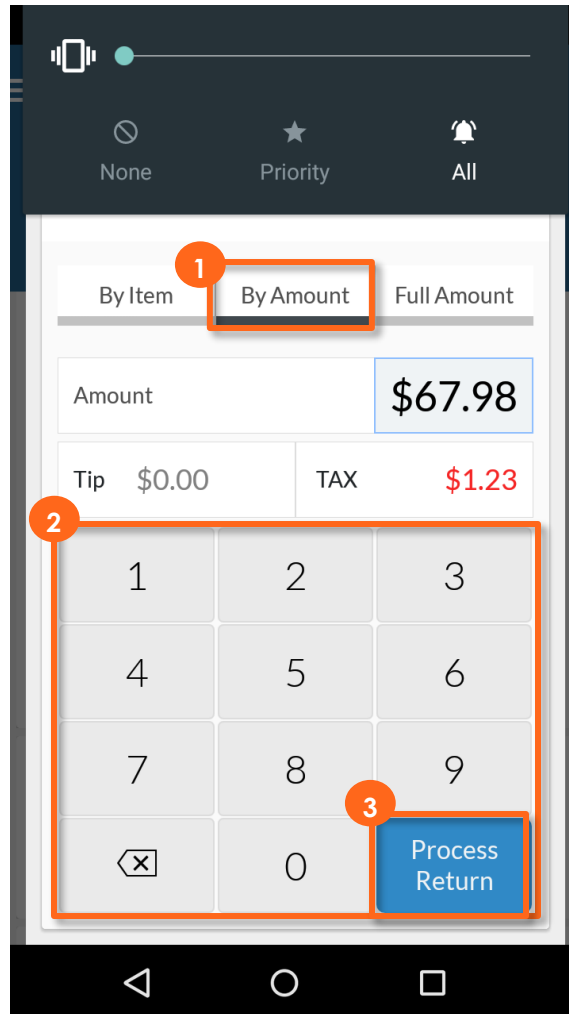


User Guide

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**.

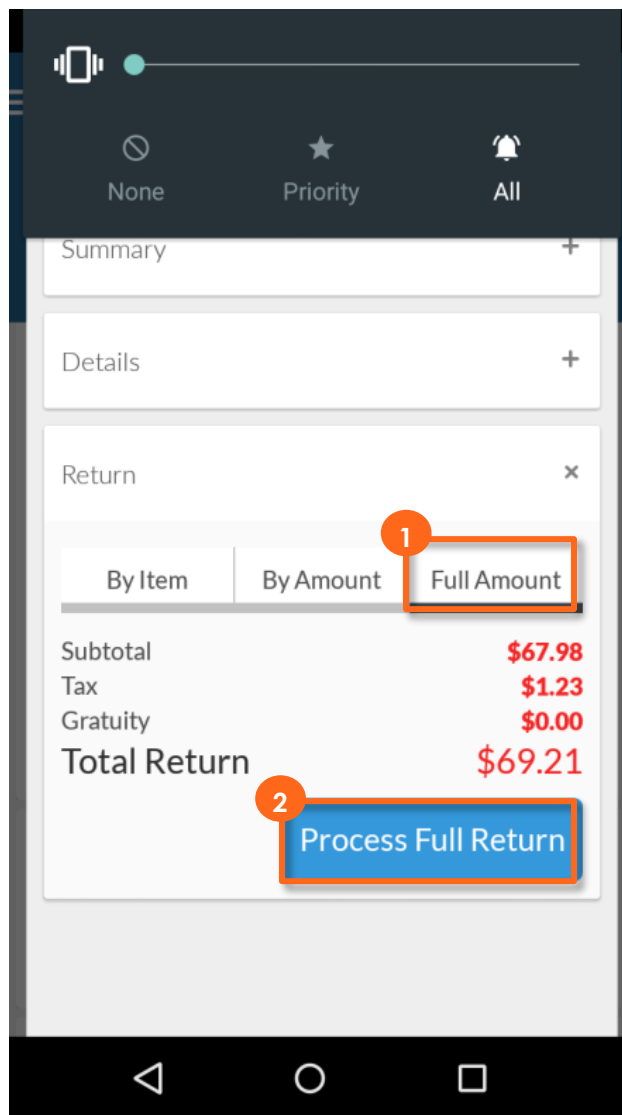


User Guide

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**.



User Guide

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

The image shows a mobile application interface for a 'Confirmation' screen. At the top, there is a status bar with various icons and a battery level of 98% at 03:02. Below the status bar is a blue header with a back arrow and the word 'Confirmation'. The main content area is divided into two sections. The top section, titled 'SUMMARY', displays transaction statistics for the date range 'Nov 30, 2017 - Dec 01, 2017'. It shows a 'Total Processed' of \$190.11, 'Total Returns' of \$69.21, and a 'Total Amount' of \$120.90. The bottom section, titled 'Receipt', shows a 'Total Returned' of \$69.21 and a message: 'Return Complete! Details available below.' Below this, there are fields for 'Transaction ID' (13852460), 'Card Number', and 'Payment Type'. An 'Email Receipt' section contains an email address field with 'example@email.com' and an email icon button. At the bottom of the screen, there are two buttons: 'Print Receipt' and 'No Receipt'.

SUMMARY		9
Date Range (Nov 30, 2017 - Dec 01, 2017)		Total Transactions
\$190.11	\$69.21	\$120.90
Total Processed	Total Returns	Total Amount

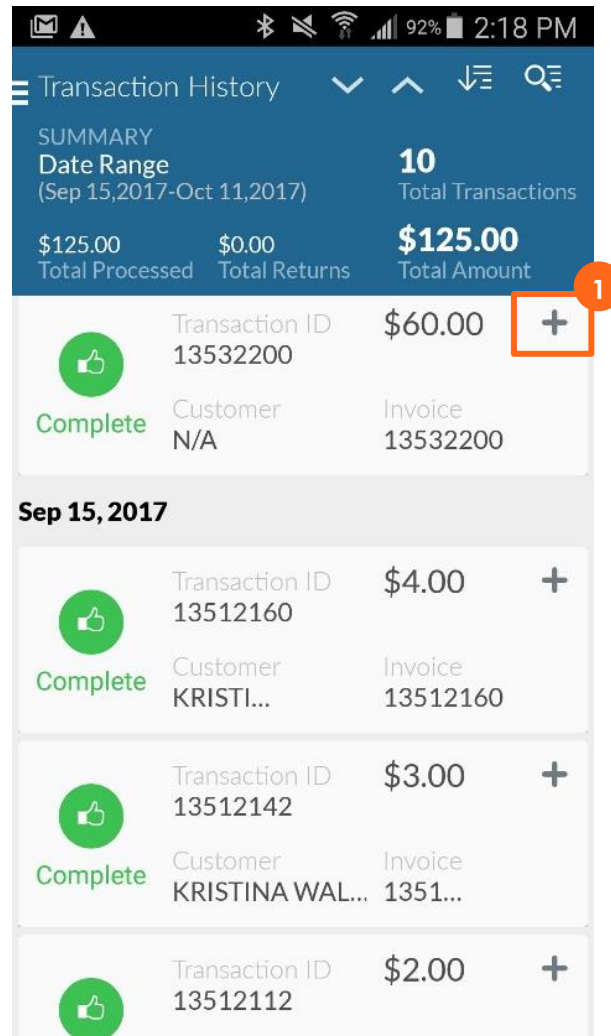
Receipt		Total Returned
Return Complete! Details available below.		\$69.21
Transaction ID	13852460	
Card Number		
Payment Type		
Email Receipt		
example@email.com		

Print ReceiptNo Receipt

User Guide

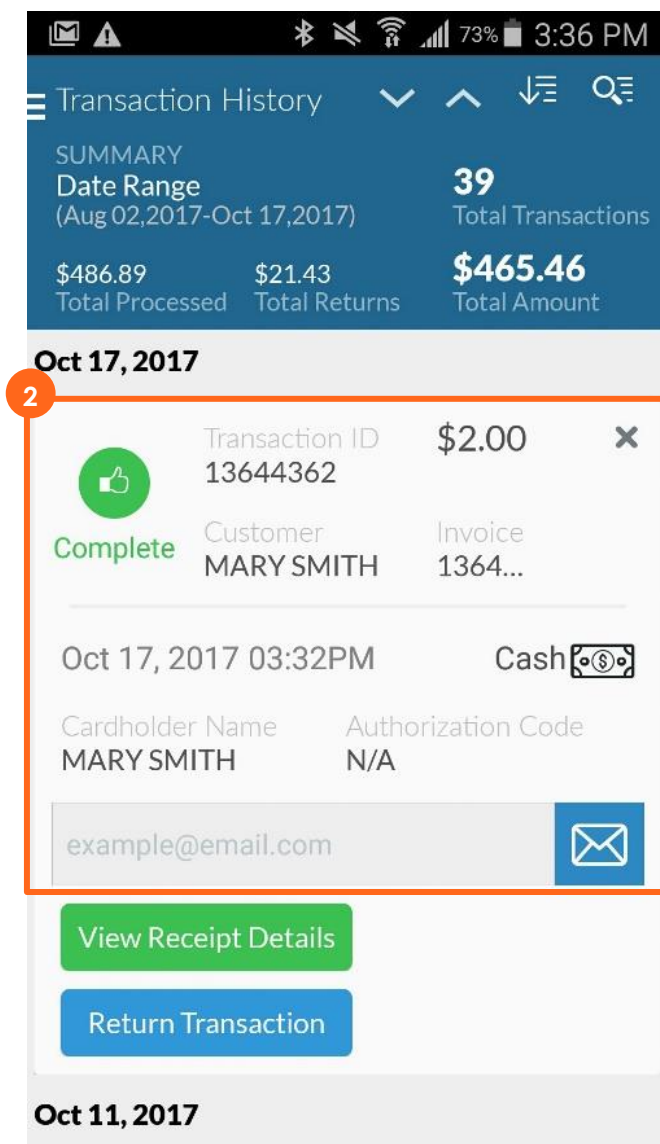
Receipt Details

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



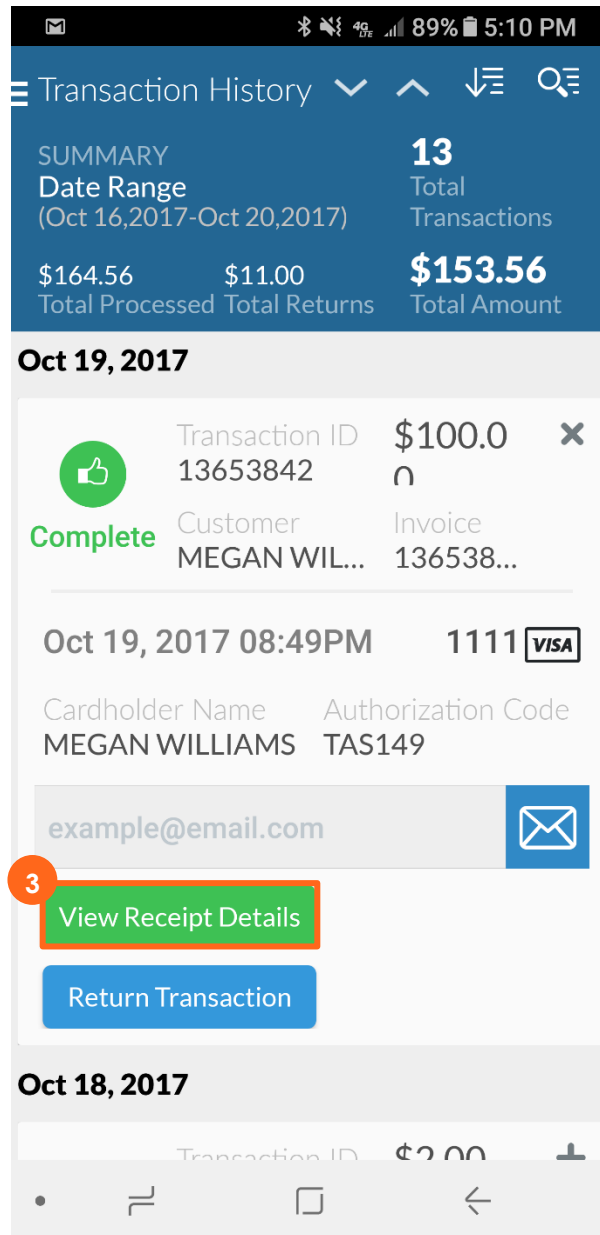
User Guide

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.



User Guide

Receipt Details

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

Transaction Details

SUMMARY

Date Range
(Oct 16, 2017-Oct 18, 2017)

8
Total Transactions

\$59.56 \$0.00 \$59.56
Total Processed Total Returns Total Amount

COMPLETE

Amount	\$5.55
Sales Tax	\$0.00
Tip	\$0.00
Total	\$5.55

Email Receipt

Enter email address

Customer Name

Cardholder Name AMY WILSON

Payment Type Visa - 1111

Invoice 13648406

AVS Code Z

User Guide

Back Office/Merchant Center

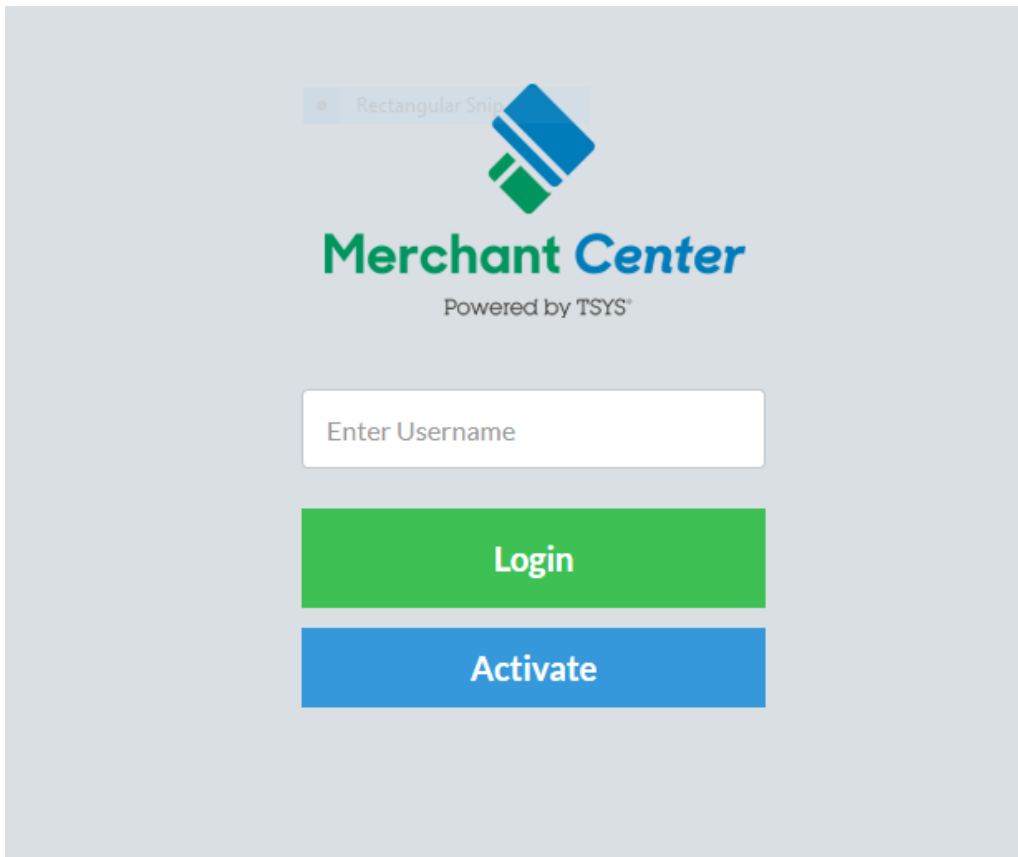
Merchant Center is an online centralized resource for merchants on the TransIT platform. In Merchant Center, you can manage and support your business, control employee access to Mobile Payment Acceptance features, upload or create your product database and track customers.

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**.



User Guide

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

The screenshot displays a login interface with a light gray background. At the top, the text "Username:" is visible. Below it, a smaller line of text reads: "Verify your Personal Assurance Message (PAM) and enter password to sign in. If the PAM displayed is not correct, call 1-800-555-5555". A gray rectangular box labeled "Personal Assurance Message" is positioned below the text. Underneath this box, the text "Enter Password" is displayed. A white rectangular input field with an orange border contains the placeholder text "Enter Password". Below the input field, the text "Forgot Password?" is visible. At the bottom of the screen, there are two buttons: a gray "Cancel" button on the left and a green "Next" button on the right.

User Guide

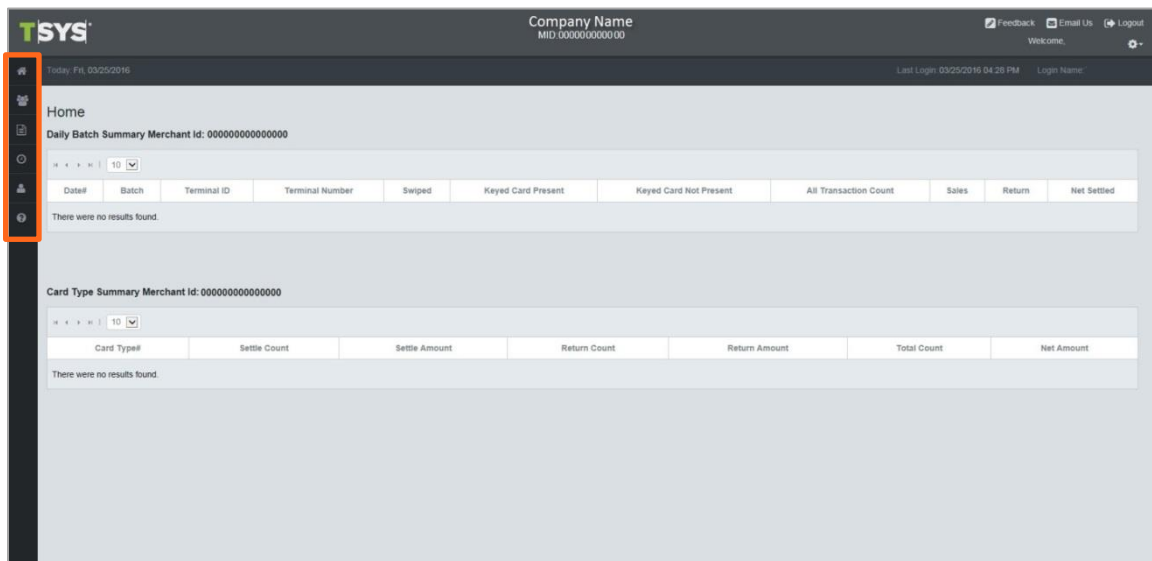
Creating User Profiles in Merchant Center

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.

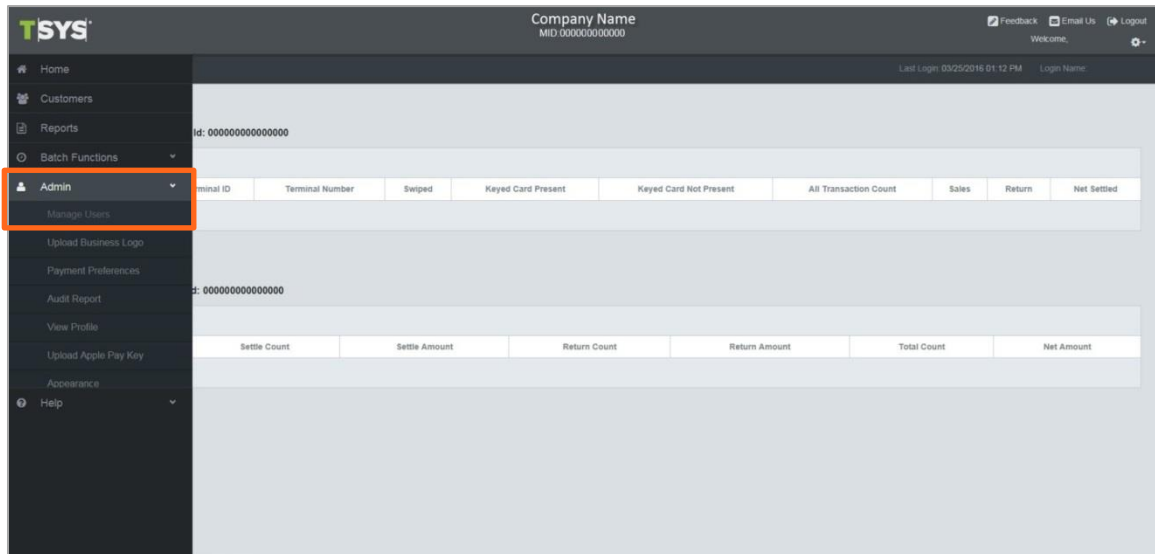
To create a new MPA user profile in Merchant Center:

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

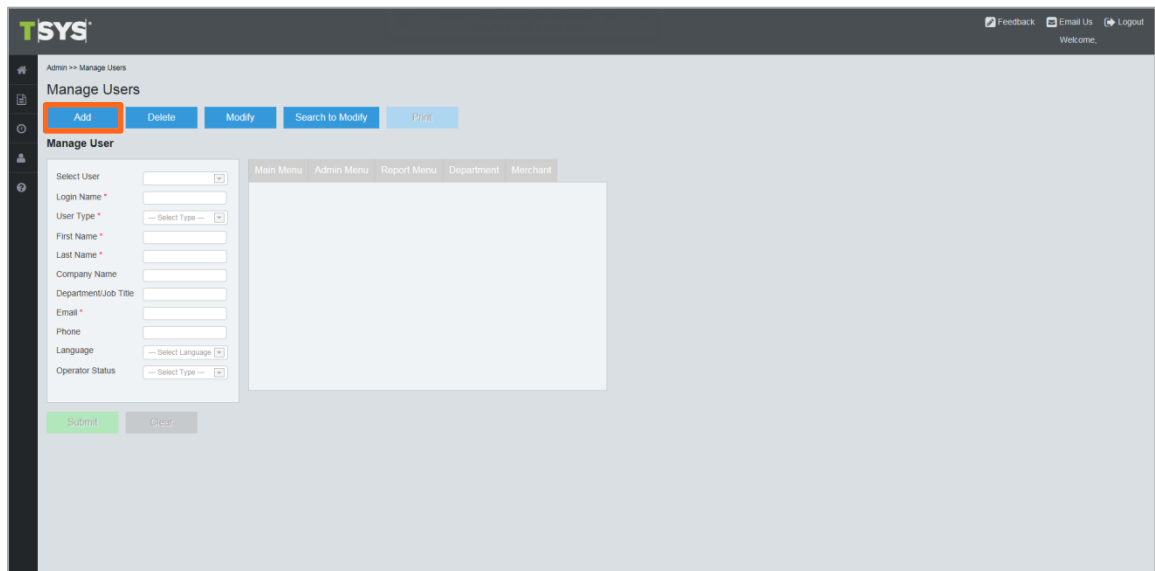


User Guide

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.

The screenshot displays the 'Manage Users' interface in the TSYs system. The 'Add User' form is on the left, and the permissions configuration is on the right. Numbered callouts indicate the following steps:

- 5**: Points to the 'User Type' dropdown menu, which is set to 'Supervisor'.
- 6**: Points to the 'Add User' form fields, including 'Login Name', 'First Name', 'Last Name', 'Company Name', 'Department/Job Title', 'Email', 'Phone', and 'Language'.
- 7**: Points to the permissions configuration area, which includes tabs for 'Main Menu', 'Admin Menu', 'Report Menu', 'Department', and 'Merchant'. The 'Merchant' tab is selected, showing a grid of permissions with checkboxes.
- 8**: Points to the 'Submit' button at the bottom of the form.

The permissions grid under the 'Merchant' tab includes the following items:

- ☒ Sale
- ☒ Sale - Authorize Only
- ☒ Sale - Authorize and Settle
- ☒ Sale - Forced Authorize
- ☒ Force Return
- ☒ Customer Database/Recurring
- ☒ Admin
- ☒ Reports
- ☒ Help
- ☒ Feedback
- ☐ Contact Us
- ☒ Void
- ☒ Return
- ☐ CNP Batch
- ☐ Settle Batch
- ☒ Verify
- ☒ Balance Inquiry
- ☒ Manage My Custom Reports
- ☒ View Others Custom Reports
- ☒ Batch Functions
- ☐ Lock CC Fields

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

The screenshot shows the Merchant Center interface. At the top, there's a header with the Merchant Center logo, 'TEST PRODUCTIONS MID:000000000000', and links for Feedback, Email Us, and Logout. Below the header is a navigation bar with tabs: Products, Product Categories, Modifiers, and Import Products. A callout 'Click to different tabs' points to these tabs. Below the navigation bar is a '+ Add Product' button, with a callout 'Add New Product' pointing to it. Below the button is a search section with fields for Product Name, Product Code, Price (set to \$0.00), Status (set to Active), and Description. A callout 'Use the Search function to narrow your Product List' points to the search fields. Below the search section is a table titled '13 of 13 Products'. The table has columns: Product Name, Categories Assigned, Tax Rates Assigned, Price, Product Code, and Inventory. A callout 'Product List' points to the table. The table contains three rows of product data. A callout 'Scroll to reveal additional columns' points to the bottom of the table, indicating that more columns are available when scrolled.

Merchant Center
Powered by TDY

TEST PRODUCTIONS
MID:000000000000

Feedback Email Us Logout
Welcome, Test User

Products Product Categories Modifiers Import Products

+ Add Product

Add New Product

Search

Product Name Product Code

Price Equal to \$0.00 Status Active

Description

Search Clear

13 of 13 Products

Product List

	Product Name	Categories Assigned	Tax Rates Assigned	Price	Product Code	Inventory
	A coffee drink made with espresso and steamed milk	0	3	\$3.00	ESP002	NOT TRACKED
	CBOS Shuffle	2	6	\$10.99	1002	NOT TRACKED
	Compliance Zombie	1	3	\$9.99	1003	93

Scroll to reveal additional columns

User Guide

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

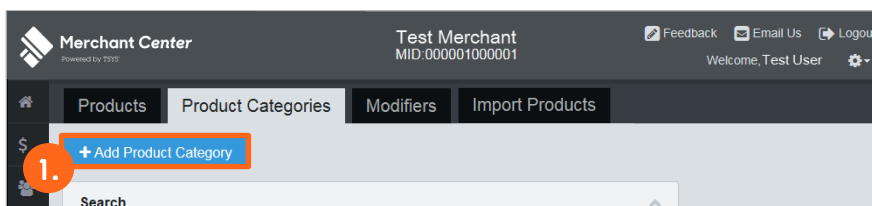
The screenshot shows the 'Product Categories' page in the Merchant Center interface. The page header includes the Merchant Center logo, 'Test Merchant' information, and user options like Feedback, Email Us, and Logout. The main navigation bar has tabs for Products, Product Categories (selected), Modifiers, and Import Products. A callout points to the '+ Add Product Category' button, labeled 'Add New Product Category'. Below this is a search section with fields for 'Product Category Name', 'Status' (set to 'Active'), and 'Description', with 'Search' and 'Clear' buttons. A callout points to the search section, labeled 'Use the Search function to narrow your Product'. Below the search section is a table titled '6 of 6 Product Categories'. The table has columns: Product Category Name, Description, Products Assigned, and Tax Rates Assigned. The table lists categories: Board Games, Card Games, Dice Games, Figurines, Food, and Video Games. A callout points to the table, labeled 'Product Categories List'. Another callout points to the bottom of the table, labeled 'Scroll to reveal additional columns'.

Product Category Name	Description	Products Assigned	Tax Rates Assigned
Board Games	Tabletop games with pieces and boards	2	
Card Games		1	
Dice Games	Games that are focused on the use of dice	1	
Figurines		0	
Food		1	
Video Games		2	

Adding Product Categories

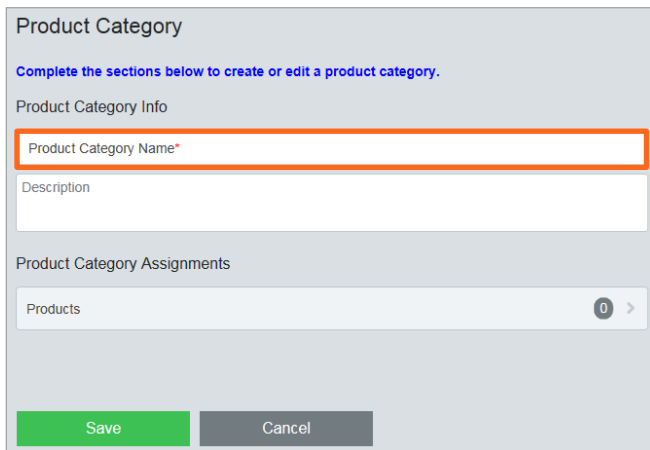
To add a new category from the Product Categories page, complete the following steps:

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



User Guide

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.



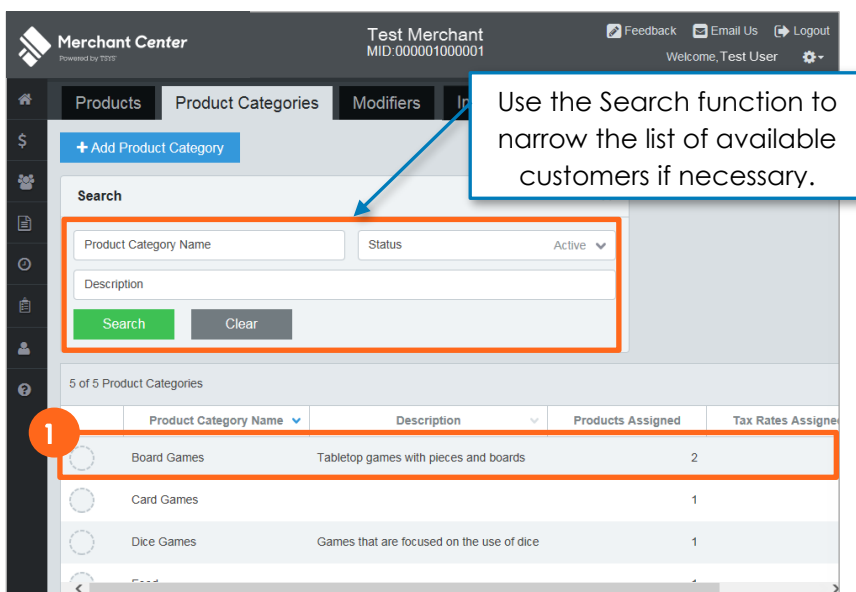
The screenshot shows a 'Product Category' form. At the top, it says 'Complete the sections below to create or edit a product category.' Below this is the 'Product Category Info' section, which contains two text input fields: 'Product Category Name*' (highlighted with an orange border) and 'Description'. Below the 'Product Category Info' section is the 'Product Category Assignments' section, which contains a 'Products' field with a '0' and a right arrow. At the bottom of the form are two buttons: 'Save' (green) and 'Cancel' (gray).

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.



The screenshot shows the 'Merchant Center' interface. At the top, it says 'Test Merchant MID: 000001000001' and 'Welcome, Test User'. Below this is a navigation bar with 'Products', 'Product Categories', 'Modifiers', and 'In'. A blue button '+ Add Product Category' is visible. Below the navigation bar is a 'Search' section with two input fields: 'Product Category Name' and 'Status' (set to 'Active'). There are 'Search' and 'Clear' buttons. A blue callout box with an arrow pointing to the 'Search' section says 'Use the Search function to narrow the list of available customers if necessary.' Below the search section is a table titled '5 of 5 Product Categories'. The table has four columns: 'Product Category Name', 'Description', 'Products Assigned', and 'Tax Rates Assigned'. The first row is highlighted with an orange border and a red circle with the number '1' next to it. The first row contains 'Board Games', 'Tabletop games with pieces and boards', and '2'. The second row contains 'Card Games' and '1'. The third row contains 'Dice Games', 'Games that are focused on the use of dice', and '1'.

Product Category Name	Description	Products Assigned	Tax Rates Assigned
Board Games	Tabletop games with pieces and boards	2	
Card Games		1	
Dice Games	Games that are focused on the use of dice	1	

User Guide

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.

The screenshot shows the 'Product Category' form. The 'Product Category Name' field is filled with 'Board Games'. Below it, a description reads 'Tabletop games with pieces and boards'. The 'Status' dropdown menu is open, showing 'Active' and 'Inactive' options. The 'Inactive' option is highlighted. At the bottom, the 'Save' button is highlighted with a green box, and the 'Cancel' button is visible next to it. Red circles with numbers 2 and 3 are placed over the 'Inactive' option and the 'Save' button respectively.

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

The screenshot shows the 'Tax Rates' page in the Merchant Center. The page header includes the Merchant Center logo, 'Test Merchant MID:000001000001', and links for Feedback, Email Us, and Logout. The main content area has a '+ Add Tax' button and a 'Tax Rates List' table. The table shows 6 of 6 tax rates. The first two rows are highlighted with a red box.

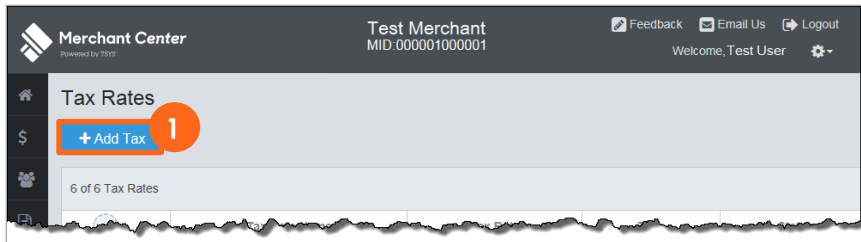
	Tax Rate Name	Tax Rate	Type	Status
	AZ Tax	8.00%	Percent	Active
	City Tax	1.50%	Percent	Active

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.

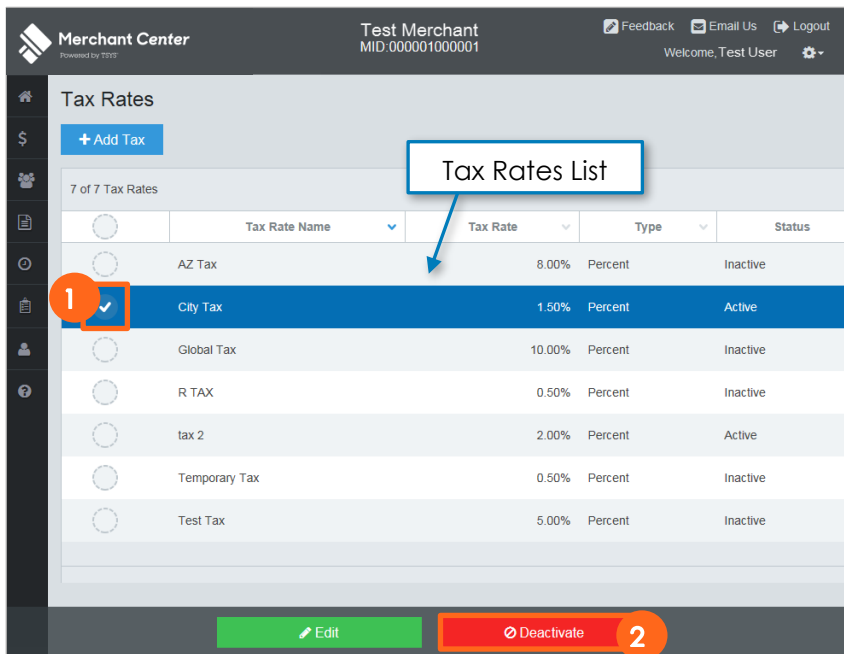
A screenshot of the 'Tax Rate' form. The form has a title 'Tax Rate' and a blue instruction: 'Complete the fields below to create or edit a tax rate. Use the checkbox to update Tax Rates for the entire Product Catalog at one time.' Below the instruction, there is a text input field for 'Tax Rate Name*' with an orange circle and the number 2 next to it. Below this is a row of fields: 'Type*' with a dropdown menu showing 'Percent (%)', 'Tax Rate*' with an orange circle and the number 3 next to it, 'Status*' with a dropdown menu showing 'Active', and an 'Apply to All Products' checkbox. At the bottom right is a green '+ Add Tax' button. At the bottom left are two buttons: a green 'Save' button with an orange circle and the number 4 next to it, and a gray 'Cancel' button.

User Guide

Deactivating Taxes

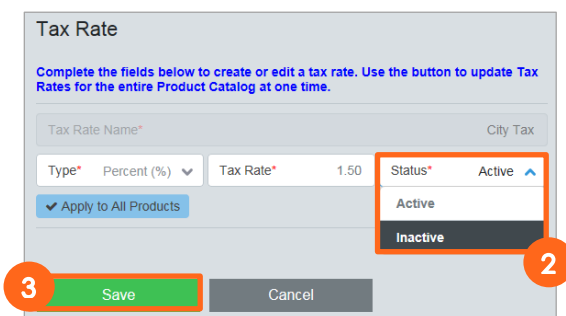
Taxes cannot be deleted in Merchant Center, but you can deactivate them. There are two ways to deactivate taxes. For the first method of deactivating a tax, complete the following steps:

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**.



User Guide

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.

The screenshot shows the 'Tax Rate' form. At the top, it says 'Tax Rate' and 'Complete the fields below to create or edit a tax rate. Use the checkbox to update Tax Rates for the entire Product Catalog at one time.' Below this, there are three fields: 'Tax Rate Name*' with the value 'Test Tax' (highlighted with a red box and a red circle with the number 1), 'Type*' with a dropdown menu set to 'Percent (%)', 'Tax Rate*' with the value '5.00' (highlighted with a red box and a red circle with the number 2), and 'Status*' with a dropdown menu set to 'Active'. Below these fields is a checkbox labeled 'Apply to All Products' (highlighted with a red box and a red circle with the number 3). At the bottom right, there is a green '+ Add Tax' button.

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

The screenshot shows a confirmation dialog box titled 'Are You Sure?'. It contains the text: 'Test Tax will automatically apply to all existing Products and Quick Sale transactions in the Mobile application. Are you sure you want to continue?'. At the bottom, there are two buttons: 'Yes' (highlighted with a red box and a red circle with the number 4) and 'No'.

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

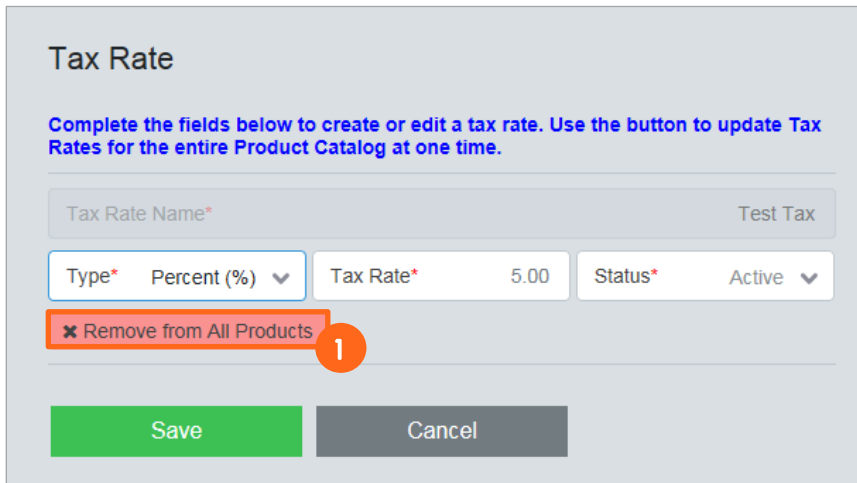
The screenshot shows the 'Tax Rate' form again. The 'Tax Rate Name*' field contains 'Test Tax'. The 'Type*' dropdown is set to 'Percent (%)', 'Tax Rate*' is '5.00', and 'Status*' is 'Active'. The 'Apply to All Products' checkbox is now checked. At the bottom, there are two buttons: 'Save' (highlighted with a red box and a red circle with the number 5) and 'Cancel'.

User Guide

Removing Global Taxes

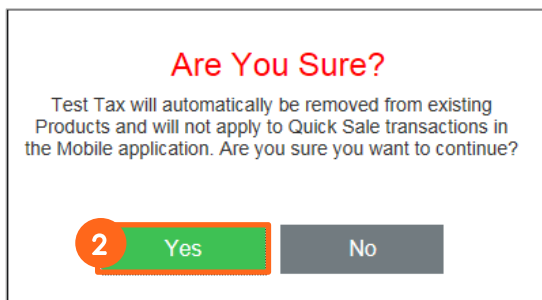
To remove a global tax from existing products, complete the following steps:

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



The screenshot shows the 'Tax Rate' form. At the top, it says 'Tax Rate' and 'Complete the fields below to create or edit a tax rate. Use the button to update Tax Rates for the entire Product Catalog at one time.' Below this are input fields for 'Tax Rate Name*' (containing 'Test Tax'), 'Type*' (set to 'Percent (%)'), 'Tax Rate*' (set to '5.00'), and 'Status*' (set to 'Active'). A red button labeled 'x Remove from All Products' is highlighted with a red circle and the number '1'. At the bottom are 'Save' and 'Cancel' buttons.

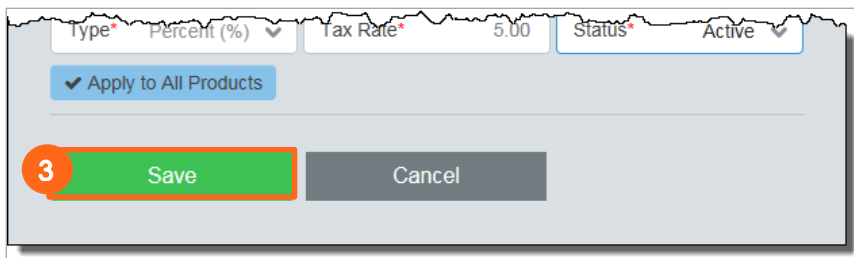
2. Click **Yes** to confirm your decision.



The screenshot shows a confirmation dialog box titled 'Are You Sure?'. The text inside says: 'Test Tax will automatically be removed from existing Products and will not apply to Quick Sale transactions in the Mobile application. Are you sure you want to continue?'. At the bottom are 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red circle and the number '2'.

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.



The screenshot shows the 'Tax Rate' form again. The 'Apply to All Products' checkbox is now checked. The 'Save' button is highlighted with a red circle and the number '3'.

User Guide

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

Product

Complete the sections below to create or edit a product.

Product Info

Product Name*

Product Code* UPC

Description

Price* \$0.00

Product Categories 0 >

Tax Rates 0 >

Inventory

Track Inventory No ▾ Quantity

Save **Cancel**

Product Information Options

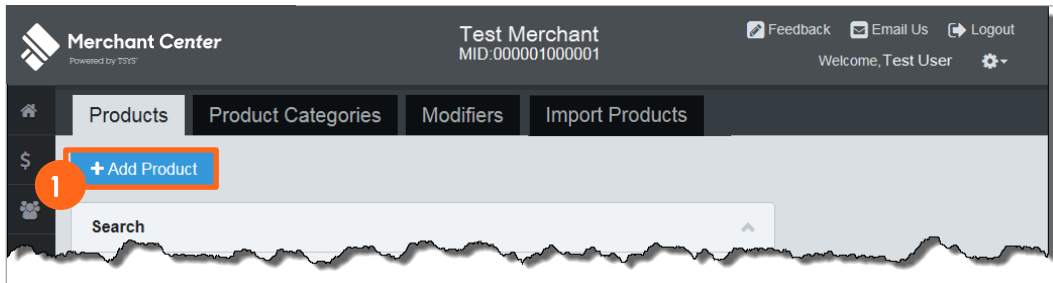
Inventory Options

User Guide

Adding a New Product

To add a new product from the Products page:

1. Click **Add Product**.

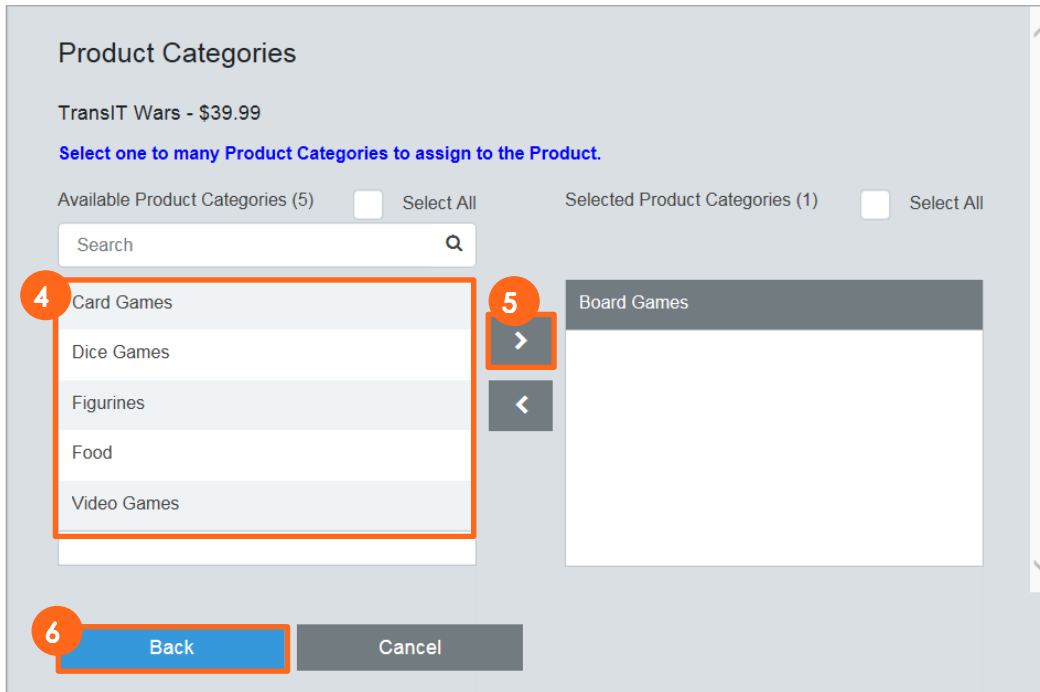


2. Enter the product information in the appropriate fields. At a minimum, you must provide a **Product Name**, a unique **Product Code**, and a **Price**.
3. If you wish to assign one or more categories to this product, click **Product Categories**. This will open the Product Categories page.

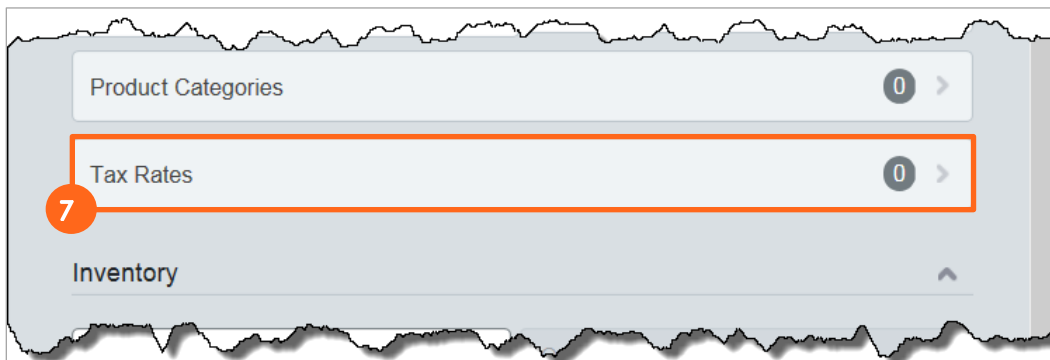
A screenshot of the 'Product' form in the Merchant Center. The form is titled 'Product' and includes a blue instruction: 'Complete the sections below to create or edit a product.' The 'Product Info' section is expanded, showing fields for 'Product Name*' (TransIT Wars), 'Product Code*' (TranWar), 'UPC' (0000001000000), and 'Price*' (\$39.99). The 'Status*' is set to 'Active'. Below this, the 'Product Categories' section is highlighted with a red circle and the number 3. The 'Tax Rates' section is partially visible at the bottom, with a red circle and the number 2 next to it.

User Guide

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.



User Guide

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**.

The screenshot shows the 'Tax Rates' interface for a product named 'TransIT Wars' priced at \$39.99. It features two columns: 'Available Tax Rates (1)' and 'Selected Tax Rates (2)'. The 'Available' column contains a search bar and a list with 'Temporary Tax' at 0.50%. The 'Selected' column contains 'AZ Tax' at 8.00% and 'City Tax' at 0.15%. A right arrow button is positioned between the columns. At the bottom, there is a 'Back' button, a 'Cancel' button, and a legend for 'Active Tax Rate' (green dot) and 'Inactive Tax Rate' (grey dot). Numbered callouts 8, 9, and 10 highlight the available tax rate list, the right arrow button, and the 'Back' button respectively.

Available Tax Rates (1)	Selected Tax Rates (2)
Temporary Tax 0.50%	AZ Tax 8.00%
	City Tax 0.15%

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.

The screenshot shows the 'Inventory' section of the interface. It includes a 'Track Inventory' dropdown menu currently set to 'Yes', a 'Quantity' input field with the value '0', and a 'Save' button. A 'Cancel' button is also present. Numbered callouts 11 and 12 highlight the 'Track Inventory' dropdown and the 'Save' button respectively.

Track Inventory	Quantity
Yes	0

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

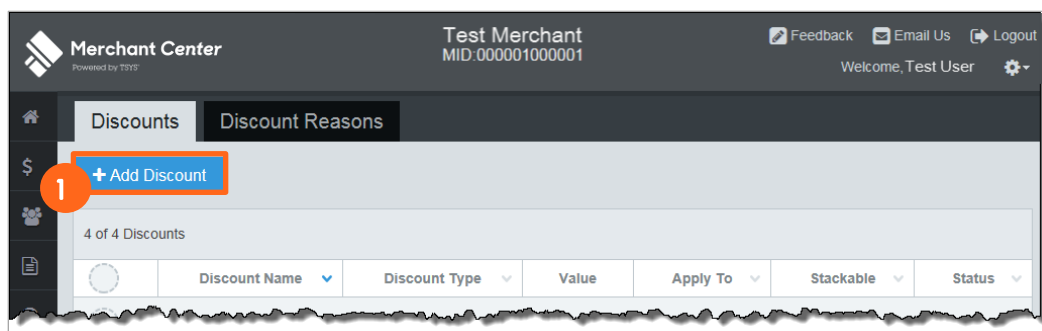
The screenshot shows the Merchant Center interface. At the top, there's a header with the Merchant Center logo, 'Test Merchant MID:000001000001', and links for Feedback, Email Us, and Logout. Below the header, there's a navigation bar with 'Discounts' and 'Discount Reasons' tabs. A callout points to the 'Discount Reasons' tab with the text 'Click to access Discount Reasons tab'. Below the navigation bar, there's a '+ Add Discount' button with a callout 'Add New Discount'. To the right of the button is a 'Discounts List' callout pointing to a table. The table is titled '4 of 4 Discounts' and contains the following data:

	Discount Name	Discount Type	Value	Apply To	Stackable	Status
	\$5 Off \$50	Amount(\$)	\$5.00	Both	Yes	Active
	Disco Days	Percent(%)	5.00%	Both	No	Active
	Manager Discount	Percent(%)	10.00%	Both	Yes	Active
	Year-end Promotion	Percent(%)	5.00%	Both	Yes	Active

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.



User Guide

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**.

The screenshot shows a 'Discount' form with the following fields and callouts:

- 2**: Points to the 'Discount Name*' text input field.
- 3**: Points to the 'Type*' dropdown menu.
- 4**: Points to the 'Value*' text input field, which currently displays '0.00'.
- 5**: Points to the 'Apply Discount To*' dropdown menu, which currently displays 'Product and Transaction'.
- 6**: Points to the 'Stackable*' dropdown menu, which currently displays 'Yes'.
- 7**: Points to the green 'Save' button.

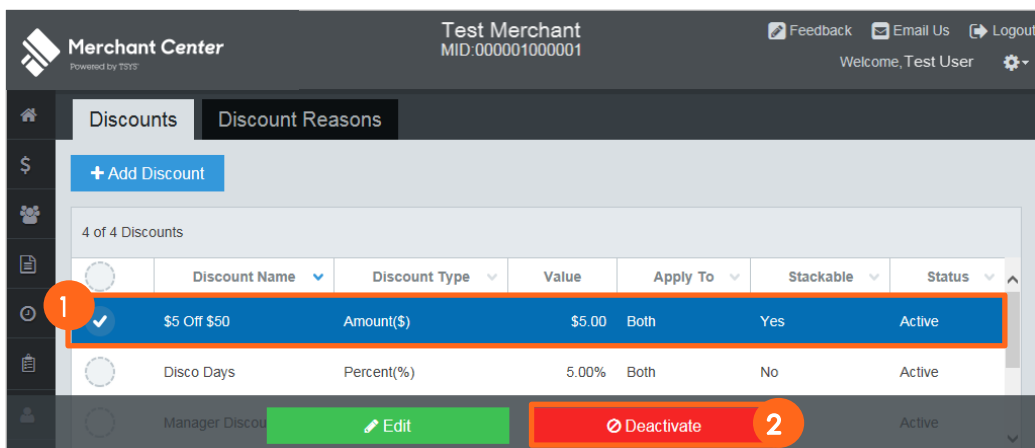
Other visible elements include a 'Description' text area, a 'Cancel' button, and a blue instruction text: 'Complete the fields below to create or edit a discount.'

User Guide

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**.

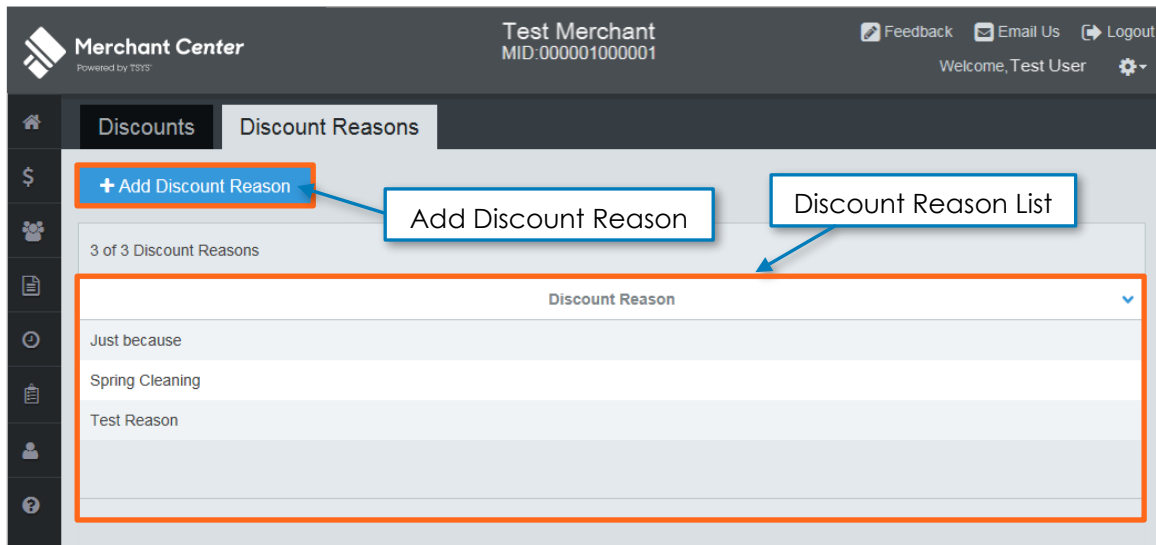
The screenshot shows the 'Discount' edit form. It has fields for 'Discount Name*' (with a value of '\$5 Off \$50'), 'Type*' (with a value of 'Amount'), 'Value*' (with a value of '\$5.00'), 'Apply Discount To*' (with a value of 'Product and Transaction'), and 'Stackable*' (with a value of 'Yes'). There is a 'Status*' dropdown menu that is open, showing 'Active' and 'Inactive' options. A red box highlights the 'Status' dropdown menu, and a red circle with the number 2 is next to it. At the bottom, there is a green 'Save' button and a grey 'Cancel' button. A red box highlights the 'Save' button, and a red circle with the number 3 is next to it.

User Guide

Adding Discount Reasons

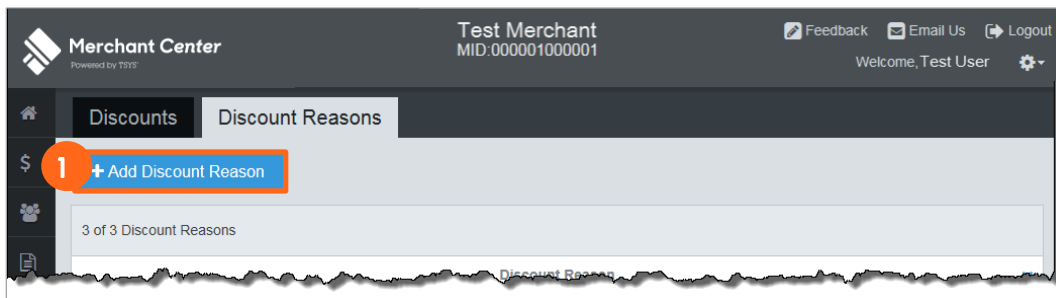
There are times when existing discounts do not provide sufficient flexibility. For this reason, Merchant Center allows you to add discount reasons for use with manual discounts. Discount reasons can be managed from the Discount Reasons tab, which is accessible from the Discounts page.

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**.

A screenshot of the 'Discount Reasons' form. The form has a title 'Discount Reasons' and a subtitle 'Add a reason to use with manual discounts.' Below the subtitle is a text input field labeled 'Discount Reason Name*'. A green button labeled '+ Add Discount Reason' is to the right of the input field. At the bottom of the form are two buttons: 'Save' (green) and 'Cancel' (gray). A red box highlights the 'Save' button, and a callout with the number '3' points to it.

User Guide

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

The screenshot shows the Merchant Center interface for the Modifiers page. The top navigation bar includes 'Products', 'Product Categories', 'Modifiers' (selected), and 'Import Products'. The left sidebar contains various icons for navigation. The main content area features a '+ Add Modifier' button, a search section with input fields for 'Modifier Name', 'Description', and 'Status', and a 'Modifiers List' table. Annotations highlight the '+ Add Modifier' button, the search section, and the 'Modifiers List' table.

Annotations:

- Add New Modifier:** Points to the '+ Add Modifier' button.
- Use the Search function to narrow the list of available modifiers if necessary:** Points to the search input fields.
- Modifiers List:** Points to the table listing modifiers.

Modifiers List Table:

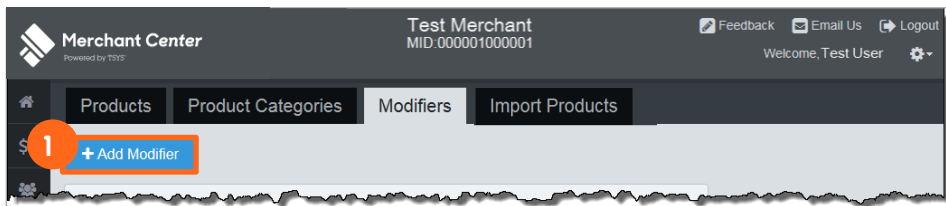
	Modifier Name	Description	Price	Status
	Add Whipped Cream	Adds a dollop of whipped cream to any beverage	\$0.25	Active
	Double Shot	Double shot of espresso	\$0.75	Active
	Extra Shot	One additional shot of espresso	\$0.50	Active
	Triple Shot	Triple shot of espresso	\$1.25	Active

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.



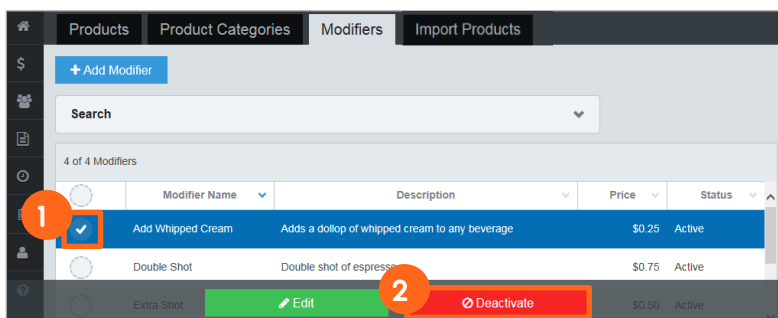
2. Type a name in the **Modifier Name** field.
3. Enter a dollar amount in the **Price** field.
4. Click **Save**. Your modifier can now be added to products in your inventory.

A screenshot of the 'Add Modifier' form. The form has a title 'Modifier *For Use with Android Tablets Only*'. Below the title is a blue link 'Complete the fields below to create or edit a modifier.' The form contains three input fields: 'Modifier Name*' (highlighted with a red circle and the number 2), 'Description', and 'Price' (highlighted with a red circle and the number 3). The 'Price' field shows '\$0.00'. At the bottom of the form are two buttons: 'Save' (highlighted with a red circle and the number 4) and 'Cancel'.

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**.



User Guide

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**.

The screenshot shows a form titled "Modifier *For Use with Android Tablets Only*" with the instruction "Complete the fields below to create or edit a modifier." The form contains the following fields:

- Modifier Name***: A text input field containing "Add Whipped Cream".
- Description**: A text area containing "Adds a dollop of whipped cream to any beverage".
- Price***: A text input field containing "\$0.25".
- Status***: A dropdown menu currently showing "Active" with a blue upward arrow. The dropdown is open, showing two options: "Active" and "Inactive". The "Inactive" option is highlighted in dark grey. A red circle with the number "2" is next to the dropdown.

At the bottom of the form are two buttons: a green "Save" button and a grey "Cancel" button. The "Save" button is highlighted with a red circle and the number "3".

User Guide

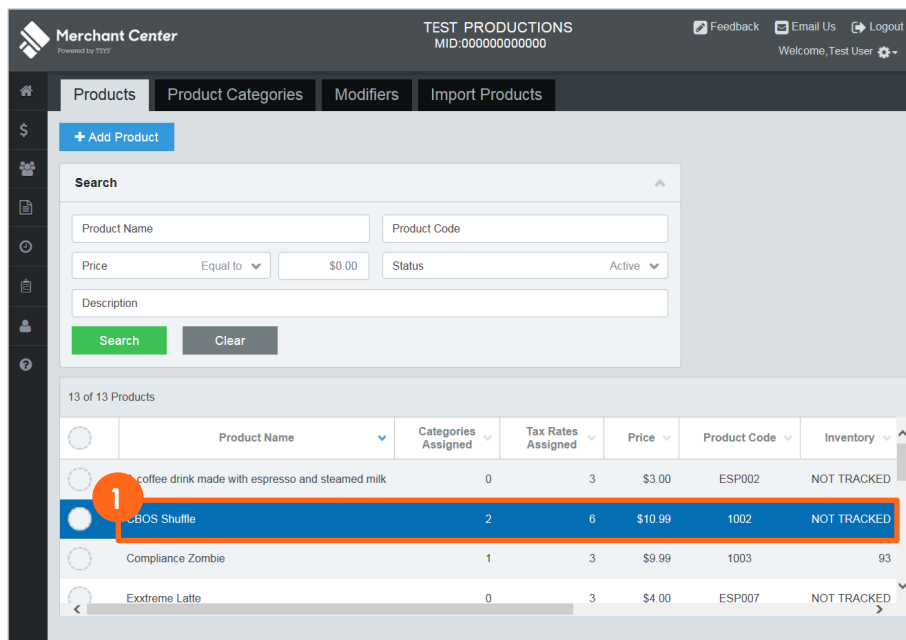
Variations

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.

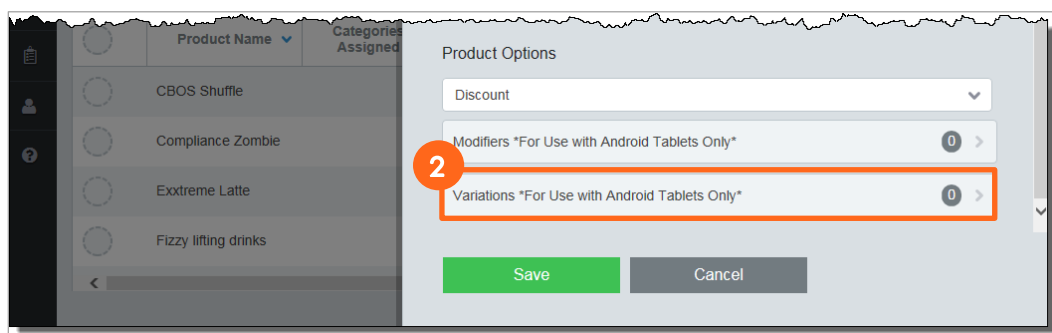
Adding Variations

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.



User Guide

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.

Variations *For Use with Android Tablets Only*

CBOS Shuffle - \$10.99

Complete the fields below to create or edit a variant. ⓘ

3 Variant Name*

4 Value(s)*

Separate values with a comma

Remove Variant

+ Add Variant

Cancel

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.

Variations *For Use with Android Tablets Only*

CBOS Shuffle - \$10.99

Complete the fields below to create or edit a variant. ⓘ

Variant Name* Edition

Value(s)* Standard x Collectors x Delux x

Separate values with a comma

+ Add Variant

Remove Variant

Manage Variations

Finalize the individual Variation details below. ⓘ

Filter

Variation	Status	Track Inventory	Quantity	Upcharge
Standard	Active	No	0	\$0.00
Collectors	Active	Yes	250	\$39.00
Delux	Active	Yes	750	\$14.00

5

6 Done

Cancel

Click to save your progress

Save

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

Product Name Categories Assigned

CBOS Shuffle

Compliance Zombie

Extreme Latte

Fizzy lifting drinks

Product Options

Discount

Modifiers *For Use with Android Tablets Only* 0 >

Variations *For Use with Android Tablets Only* 3 >

7 Save

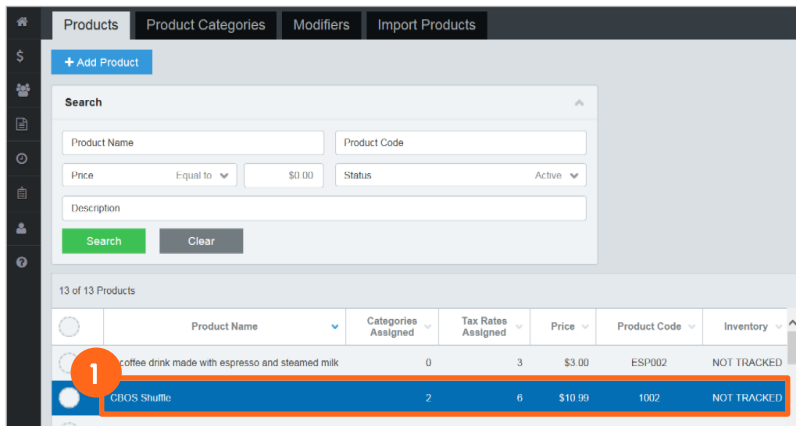
Cancel

User Guide

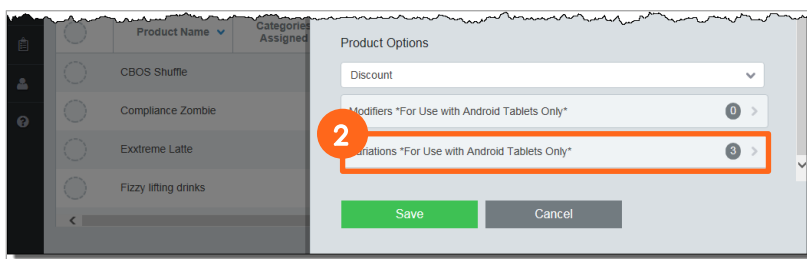
Modifying Variations

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

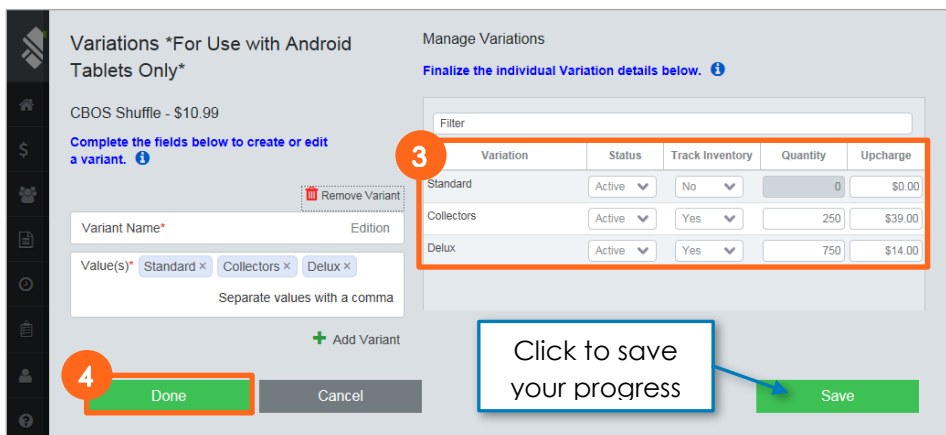
1. Access the product options for the product you wish to modify from the Products page by clicking the **Product Name** in the Product List. This will open the Product page.



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.

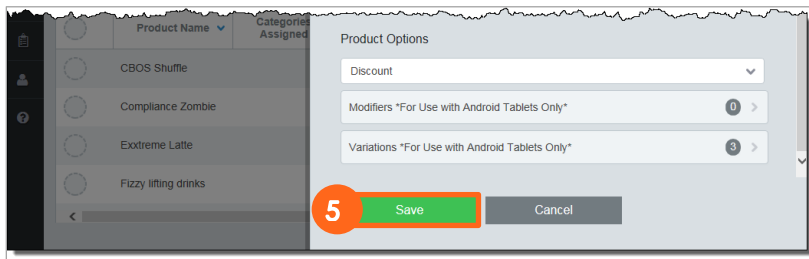


3. Modify status, tracking, quantity, and upcharge information for your variations as needed. Click **Save** at any point during this process to save your changes.
4. Click **Done** to return to the Product page.



User Guide

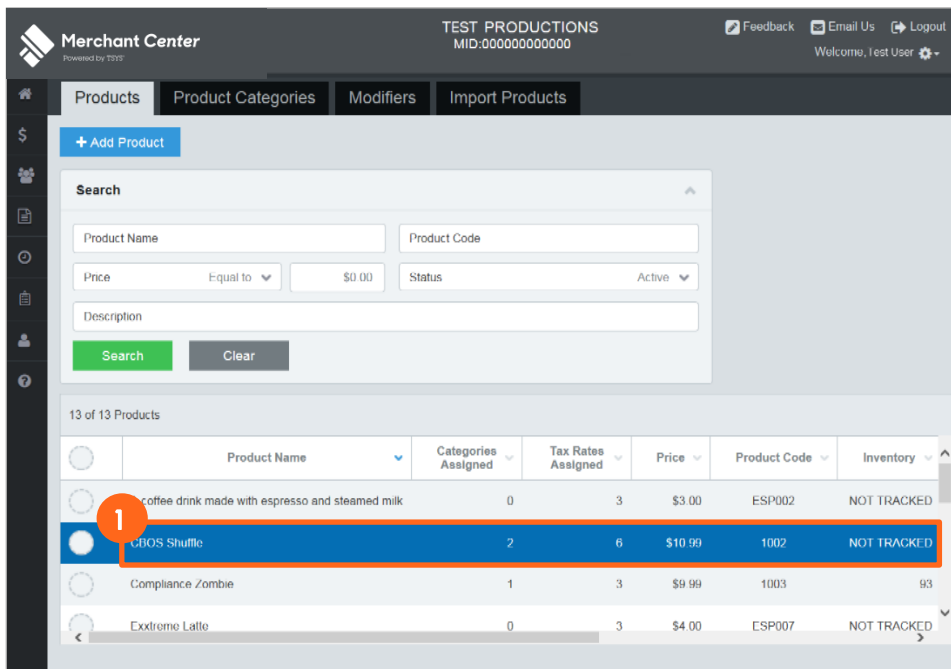
5. Click **Save** to complete this process.



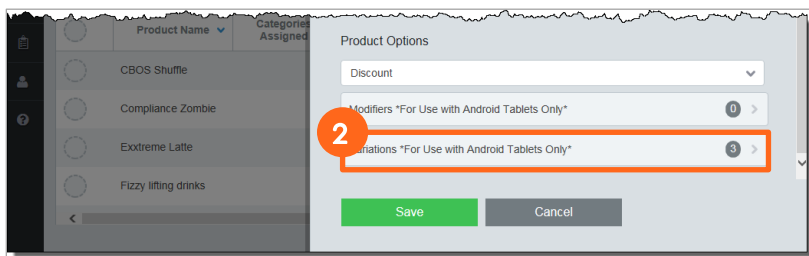
Removing Variations

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.



User Guide

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.

Variations *For Use with Android Tablets Only*

CBOS Shuffle - \$10.99

Complete the fields below to create or edit a variant. ⓘ

3 Remove Variant

Variant Name* Edition

Value(s)* Standard × Collectors × Delux ×

Separate values with a comma

+ Add Variant

4 Done Cancel

Save

Manage Variations

Finalize the individual Variation details below. ⓘ

Filter

Variation	Status	Track Inventory	Quantity	Upcharge
Standard	Active	No	0	\$0.00
Collectors	Active	Yes	250	\$39.00
Delux	Active	Yes	750	\$14.00

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

Product Name Categories Assigned

CBOS Shuffle

Compliance Zombie

Extreme Latte

Fizzy lifting drinks

Product Options

Discount

Modifiers *For Use with Android Tablets Only* 0 >

Variations *For Use with Android Tablets Only* 0 >

5 Save Cancel

User Guide

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

The screenshot shows the 'Product' page for an existing product. The page is divided into three main sections: Product Info, Inventory, and Product Options. Each section has a red box highlighting specific fields, with callouts pointing to them.

Product Info

- Product Name***: Test Product
- Product Code***: Test, UPC
- Description**: (Empty text area)
- Price***: \$1.00
- Status***: Active (dropdown)
- Product Categories**: 0 (dropdown)
- Tax Rates**: 0 (dropdown)

Inventory

- Track Inventory**: No (dropdown)
- Quantity**: 0

Product Options

- Discount**: (dropdown)
- Modifiers *For Use with Android Tablets Only***: 0 (dropdown)
- Variations *For Use with Android Tablets Only***: 0 (dropdown)

Callouts:

- Product Information Options**: Points to the Product Name, Product Code, and Description fields.
- Inventory Options**: Points to the Track Inventory and Quantity fields.
- Product Options**: Points to the Discount, Modifiers, and Variations fields.

Buttons: Save (green), Cancel (grey)

User Guide

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.

Merchant Center
Powered by TSY

TEST PRODUCTIONS
MID:000000000000

Feedback Email Us Logout
Welcome, Test User

Products Product Categories Modifiers Import Products

+ Add Product

Search

Product Name Product Code

Price Equal to \$0.00 Status Active

Description

Search Clear

13 of 13 Products

Product Name	Categories Assigned	Tax Rates Assigned	Price	Product Code	Inventory
A coffee drink made with espresso and steamed milk	0	3	\$3.00	ESP002	NOT TRACKED
CBOS Shuffle	2	6	\$10.99	1002	NOT TRACKED
Compliance Zombie	1	3	\$9.99	1003	03

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.

TSY Merchant Center
Powered by TSY

Products Product Categories

+ Add Product

Search

15 of 15 Products

Product Name Categories Assigned

CBOS Shuffle

Compliance Zombie

Inventory

Track Inventory No Quantity 0

Product Options

Discount

\$5 Off \$50 \$5.00

Disco Days 5.00%

Manager Discount 10.00%

Year-end Promotion 5.00%

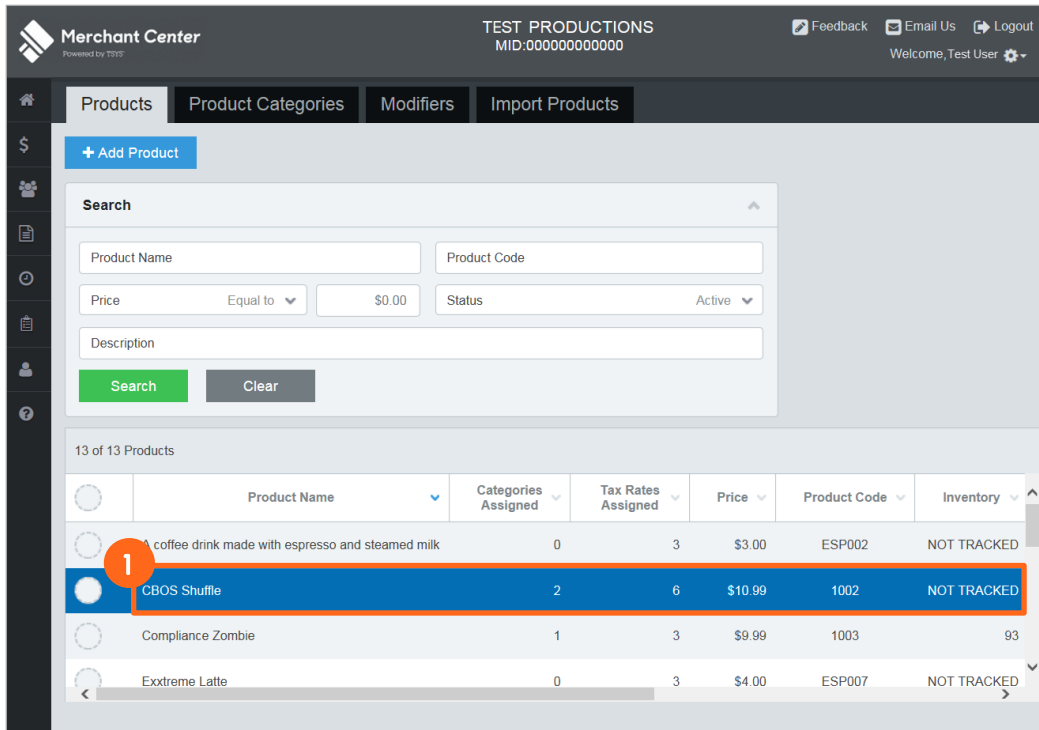
Save Cancel

User Guide

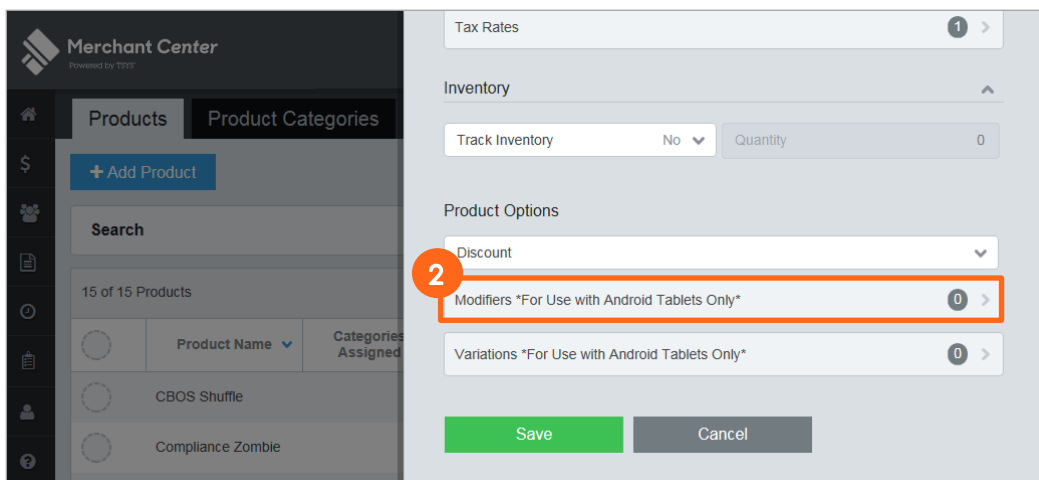
Assigning Modifiers in Product Options

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.

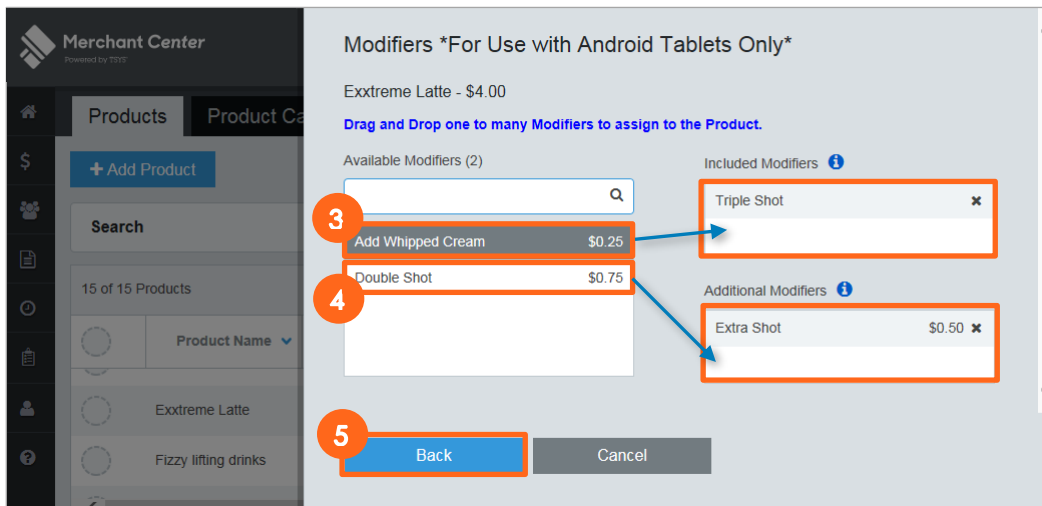


2. Click the **Modifiers** button. This will open the Modifiers page for the chosen product. **Note:** You will only be able to assign modifiers that have already been created in Merchant Center.

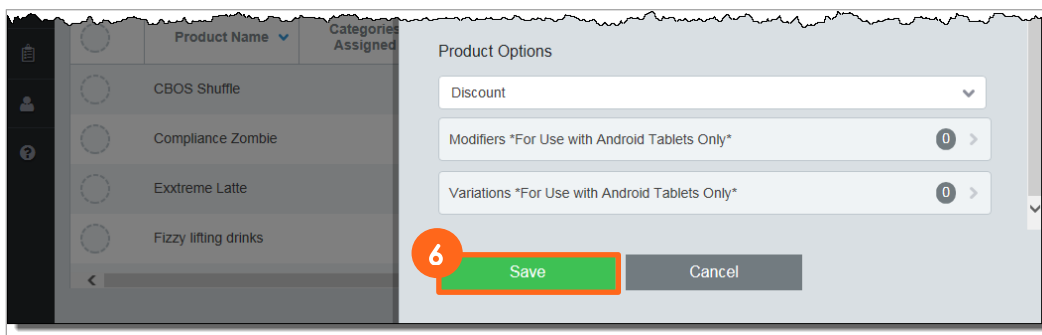


User Guide

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

The screenshot shows the 'Import Products' page in the Merchant Center interface. The page has a dark header with the Merchant Center logo, 'TEST PRODUCTIONS MID:000000000000', and links for Feedback, Email Us, and Logout. Below the header is a navigation bar with tabs for Products, Product Categories, Modifiers, and Import Products. The main content area is divided into two sections: 'Download / Upload Template' and 'Upload Template'. The 'Download / Upload Template' section contains a 'Download Template' link and an 'Import Product Instructions' link. The 'Upload Template' section contains a 'Select File' input field with a 'Browse' button and an 'Upload' button. A table at the bottom shows the status of uploaded files, with columns for File Name, Date and Time, Total Records, Accepted Records, Rejected Records, File Status, and File Rejection Reason. The table currently shows 'No results found.'

Download the import file template

Access and download instructions on importing products

Browse for a file to upload

Upload the selected file

File Name	Date and Time	Total Records	Accepted Records	Rejected Records	File Status	File Rejection Reason
No results found.						