Mobile Pay Plus App User Guide

Document Version 1.1.0.1

March 2018

First Data™

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1 SUPPORTED DEVICES

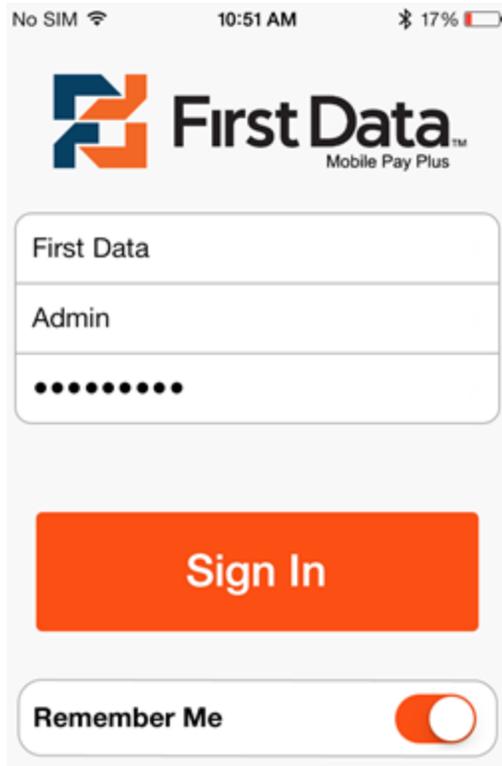Mobile Pay Plus EMV Chip and Pin processing is compatible with:

iPhone iOS 7+

iCMP PIN pad by Ingenico

2 LOG INTO THE APP

When you signed up for First Data Mobile Pay Plus processing, as the account administrator, you were sent an email with a login name and password to access the system.

Log in


1. On your mobile device, sign in with your **Company Name, User Name**, and **Password**. The logins are case-sensitive, so make sure you type them *exactly* as they are in the welcome email.

> **Note:** If you try your password more than three times, you will be locked out of your account. You must wait 30 minutes before trying again.

2. Tap **Sign In**. The First Data Mobile Pay Plus main screen opens.
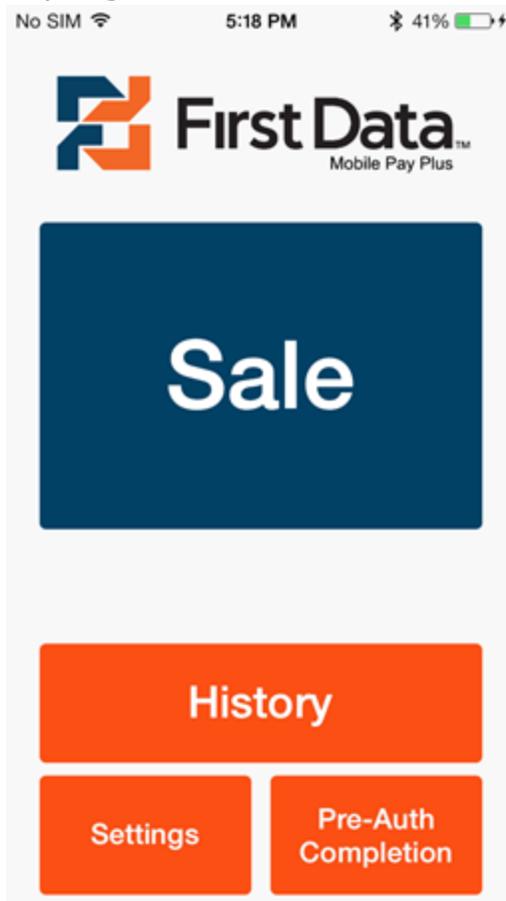
3. To log out, tap **Settings**, then **Logout**.
4. To store your login information, slide **Remember Me** to **ON**.

Troubleshooting

If you have difficulty with the app, try these steps:

- Power cycle your device and log back in to the app.

- Delete the app from your device and reinstall it from the Apps store.

- Perform a **Force Quit** to close and reopen the app.

3 MOBILE PAY PLUS SETTINGS

After you log in, the Home screen opens. There are several options to help you set up your Mobile Pay Plus app. Tap **Settings** to customize your app.
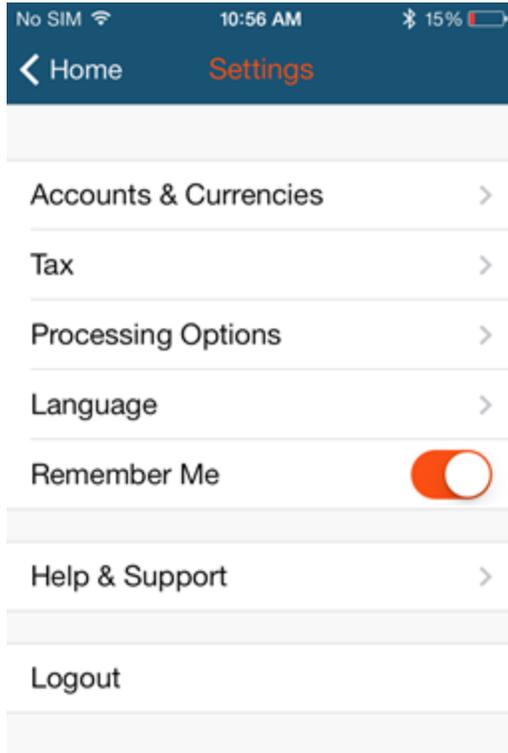
Accounts & Currencies: Coming Soon! The option to switch between CAD and USD.
Applicable if you signed up to process transactions in more than one currency or you have more than one user set up in the online member area. After your currency settings are stored, you can switch between currencies:

1. On the Settings screen, tap **Accounts and Currencies**.
2. Tap the **Account** for the currency you are using.

Tax: Specify up to two tax rates. If required for provincial or state taxes, you have the option to apply tax2 to tax1. See Taxes.

Processing Options: Turn on options for the order number, pre-authorizations, printing, and tips. See Processing Options.

PIN pad: Open the Getting Started Guide to learn how to pair the PIN pad with your iOS device.

Language: Select Canadian or American English.

**Remember Me**: Select **On** to save your credentials—no need to log on when you reopen the app.

Help & Support: Links to get help or tell a friend.

3.1 TAXES

Taxes are calculated automatically with each sale, based on the options you select and are applied to each line item individually. You can apply two different tax rates to transactions. To accommodate provincial and state taxes, you also have the option to apply tax2 to tax1 if required.

Set Taxes

1. Open the app and tap **Settings**.
2. Tap **Tax**.
3. Slide the button to turn **Tax 1** on.
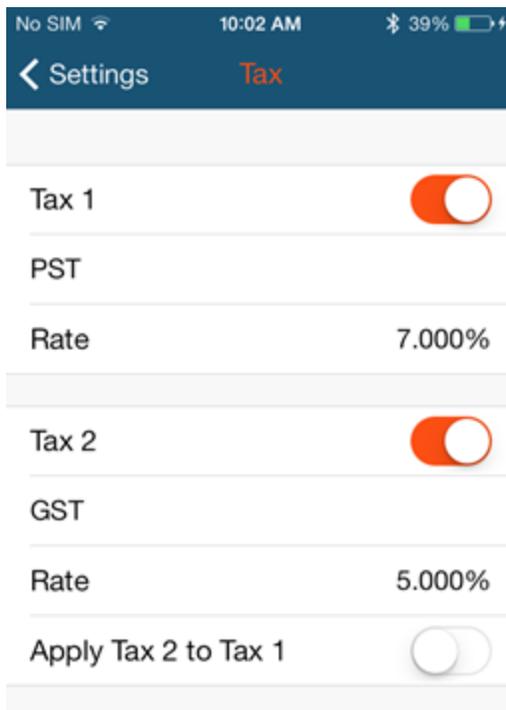
4. Enter a **Tax Name** and **Rate** for Tax 1.
5. If you are using a second tax, slide the button to turn **Tax 2** on.
6. Enter a **Tax Name** and **Rate** for Tax 2.
7. If you use two taxes, you have the option to **Apply Tax 2 to Tax 1**. slide the button to turn it on.

3.2 PROCESSING OPTIONS

On the Settings screen, tap **Processing Options**. You can customize the level of transaction detail to be collected for each sale.

Order Number: Select **On** to record the Order Number as part of the transaction. On the **Sale** screen, tap to enter the **Order Number**.

Pre-Authorization: Select **On** to allow pre-authorization transaction processing—this button displays on the Sales screen . Tap **Auth** to process a pre-authorization.

Printing: Select **On** to allow printing receipts with a transaction.

Tip: Allows your customer the option to leave a tip with their purchase. See Tips and Gratuities.

3.3 TIPS AND GRATUITIES

The Mobile Pay Plus app allows you to collect a tip or gratuity from your customers during a sale, or pre-authorization transactions made by credit card.

Enable Tips

1. Open the app and tap **Settings**.
2. Tap **Processing Options**.
3. Tap **Tip**.
4. Slide the button to turn **Tips** on. This gives the customer the option to enter a tip amount or use a slider to select a percentage.
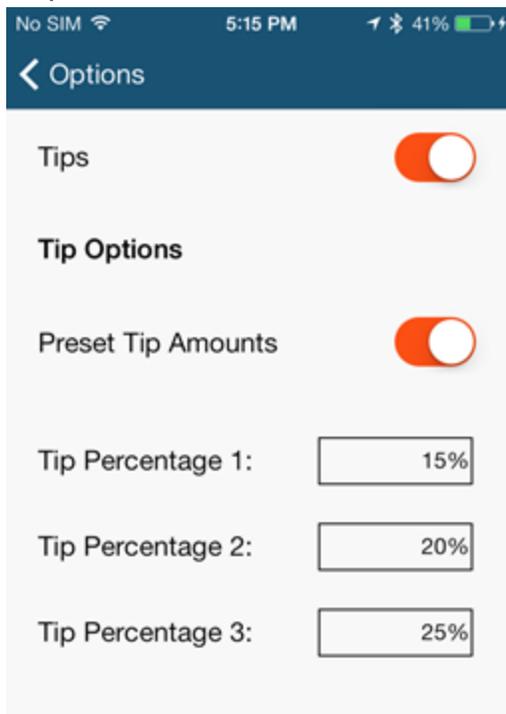
5. Slide the button to turn **Preset Tip Amounts** on. Enter an amount for one or more **Tip Percentages**.
6. Tap **Done**.

Add a Tip during a transaction

The customer can add a tip on the Confirm Sale screen.

1. Tap **Add Tip**.
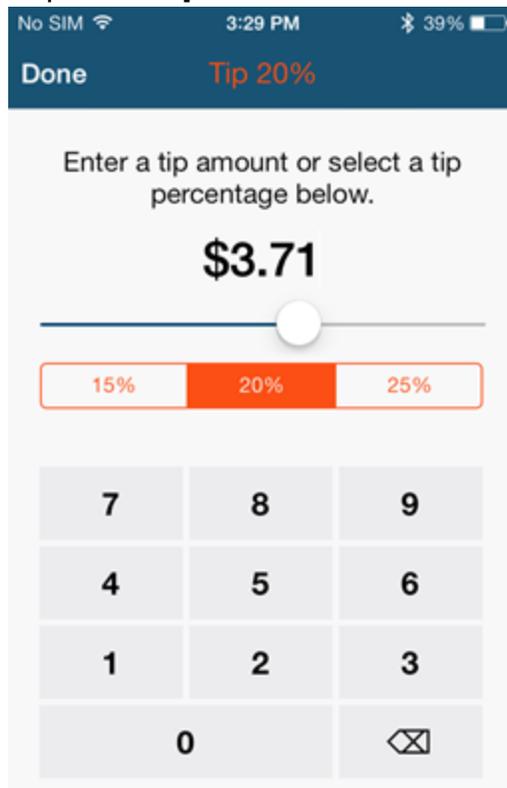
2. There are three ways a customer can leave a tip:

    -   Enter a **$** amount. At the top, the **Tip** shows as a percentage.

    -   Move the slider. The amount changes and the **Tip** shows as a percentage.

    -   Tap one of the preset tip percentages.

3. Tap **Done**.

4 PROCESSING SALES

In the Mobile Pay Plus app, there are several options to process a sale.

Processing Credit Card Sales
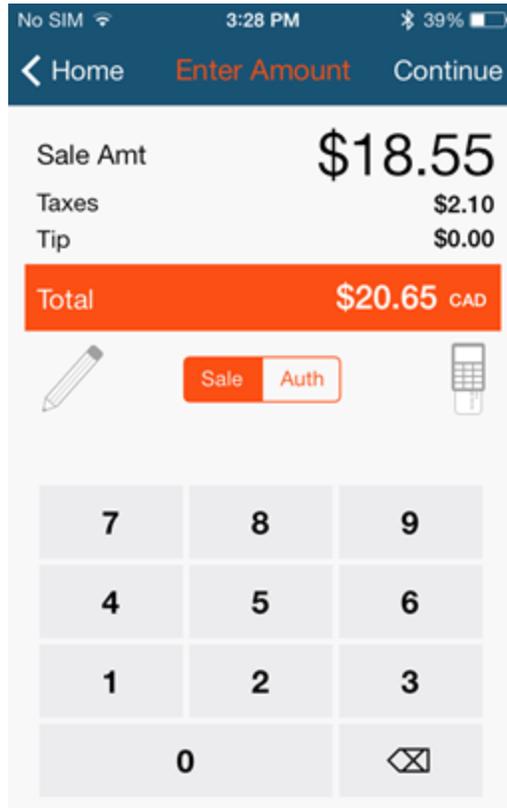
Processing Manual (keyed) Credit Card Sales

Processing Debit Sales

Processing Cash Sales

Processing Check Sales

4.1 PROCESS CREDIT CARD SALES

Make sure you are connected to the PIN pad before processing a credit card sale.

1. Open the app and tap **Sale**.
2. Enter the **Sale Amt**.

3. You can tap ![pencil icon] to add a **Note** or **Order Number** (must be enabled in Settings> Processing Options). Tap **Sale** to exit the screen.
4. If this transaction is a pre-authorization, tap **Auth**. (![Sale Auth toggle] only shows if enabled in Settings> Processing Options).
5. Tap **Continue**.
6. Hand device to customer so they can tap **Add Tip** (shows if enabled in Settings> Processing Options).

a. The customer can enter a $ amount, move the slider to select a tip by percentage, or tap one of the preset tip percentages (if enabled).

b. Tap **Done**.

7. Tap **Confirm**.

8. Tap **Credit**.
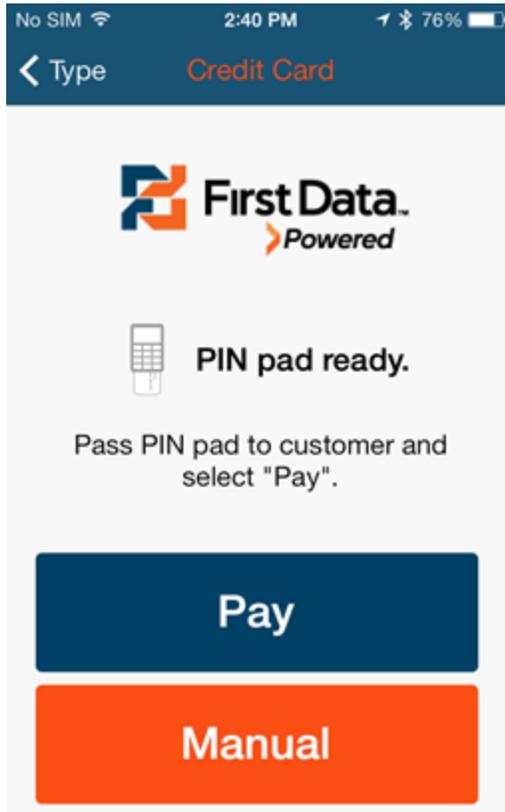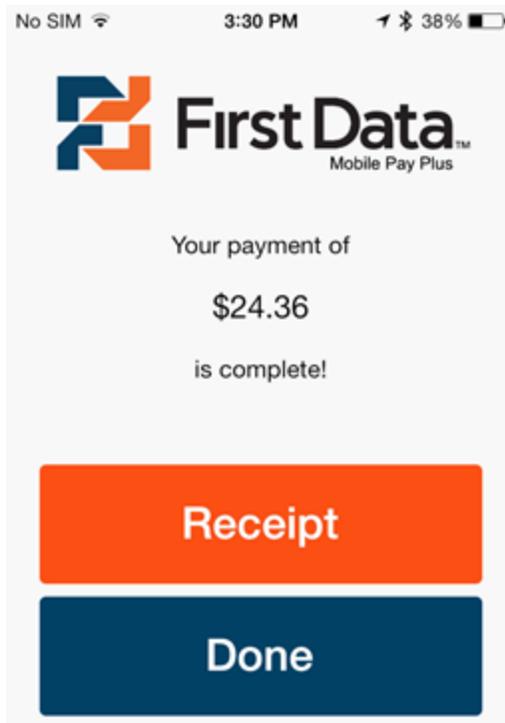
9. The App shows: PIN pad ready. Pass the PIN pad to the customer and tap **Pay**.

10. Ask the customer to follow the prompts on the PIN pad—the app shows: Transaction processing...

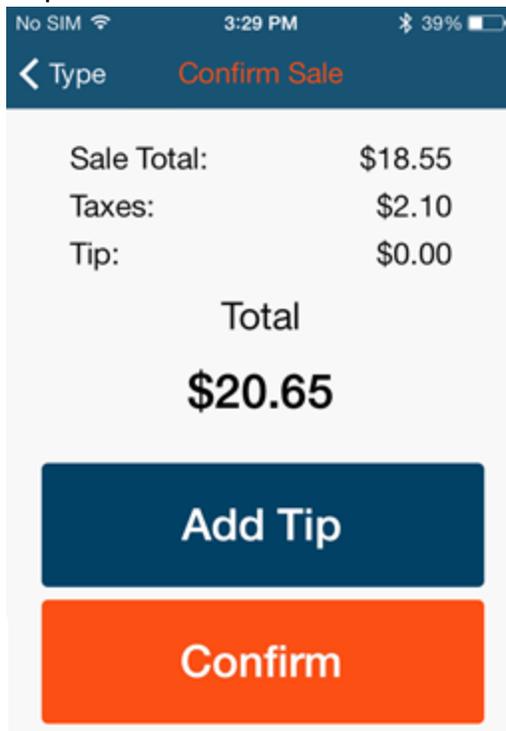After the transaction processes, the app shows the payment is complete.

> If the transaction is **Declined**, try reprocessing it. If the transaction is declined a second time, follow up with your customer.

11. Tap **Done** to complete the transaction OR if the customer wants one, tap **Receipt** and do one of the following:

- If the customer wants the receipt emailed to them, enter their **Email Address**.

- Tap **Printer**: Select a Printer, adjust the number of copies, and then tap **Print**. **Note**: AirPrint enabled printers are supported.

12. Tap **Done**.

4.2 PROCESS MANUAL CREDIT CARD SALES

Make sure you are connected to the PIN pad before processing a credit card sale.

1. Open the app and tap **Sale**.
2. Enter the **Sale Amt**.
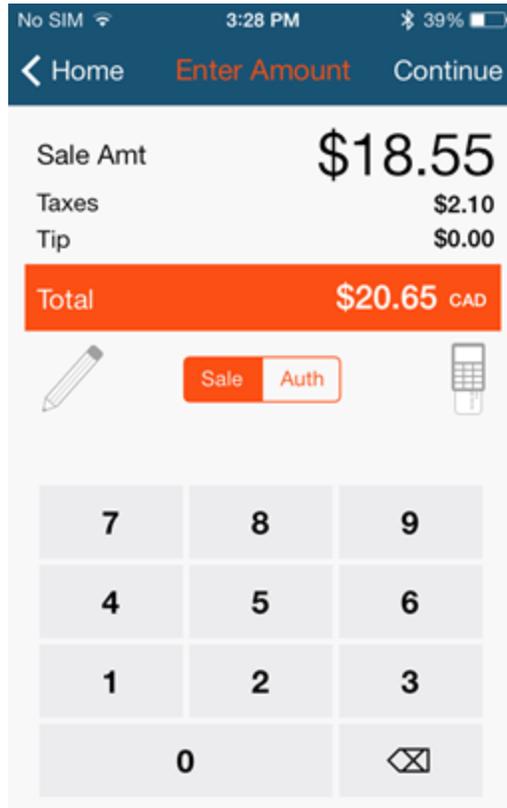
3. You can tap to add a **Note** or **Order Number** (must be enabled in Settings> Processing Options). Tap **Sale** to exit the screen.
4. If this transaction is a pre-authorization, tap **Auth**. (only shows if enabled in Settings> Processing Options).
5. Tap **Continue**.
6. Hand device to customer so they can tap **Add Tip** (shows if enabled in Settings> Processing Options).

a. The customer can enter a $ amount, move the slider to select a tip by percentage, or tap one of the preset tip percentages.
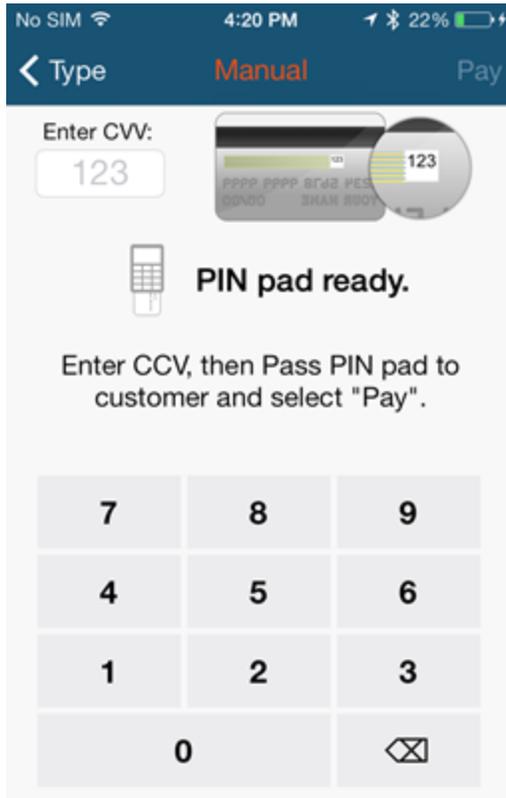b. Tap **Done**.

7. Tap **Confirm**.

8. Tap **Credit**.

9. Tap **Manual**.

10. The App shows: PIN pad ready. Enter the **CVV** number from the back of the card.

11. Pass the PIN pad to the customer and tap **Pay**.
12. Ask the customer to follow the prompts on the PIN pad. They need to enter their **Card Number** and **Expiry Date** (MMYY). After the transaction

processes, the App shows the payment is complete.

No SIM 📶   3:30 PM   ✈ ✳ 38% 🔋

First Data.™

Mobile Pay Plus

Your payment of

$24.36

is complete!
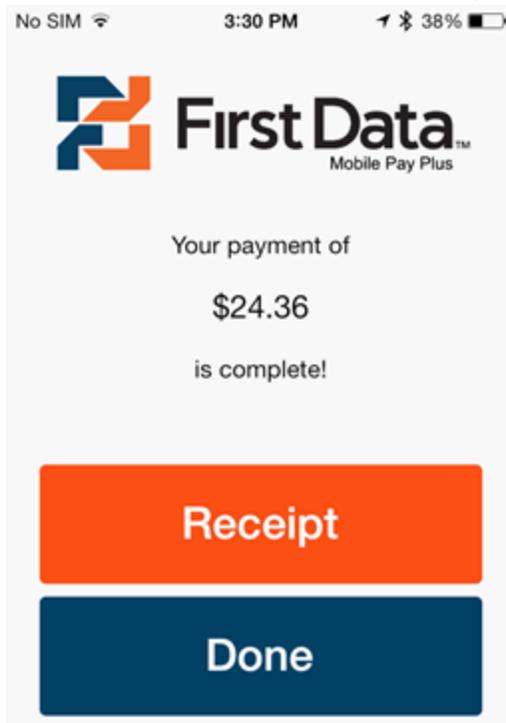
Receipt

Done

If the transaction is **Declined**, try reprocessing it. If the transaction is declined a second time, follow up with your customer.

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13. Tap **Done** to complete the transaction **OR** if the customer wants one, tap **Receipt** and do one of the following:

- If the customer wants the receipt emailed to them, enter their **Email Address**.

- Tap **Printer**: Select a Printer, adjust the number of copies, and then tap **Print**. **Note**: AirPrint enabled printers are supported.

14. Tap **Done**.

4.3 PROCESS DEBIT SALES

Make sure you are connected to the PIN pad before processing a debit card sale.

1. Open the app and tap **Sale**.
2. Enter the **Sale Amt**.

3. You can tap [pencil icon] to add a **Note** or **Order Number** (must be enabled in Settings> Processing Options). Tap **Sale** to exit the screen.
4. Tap **Continue**.
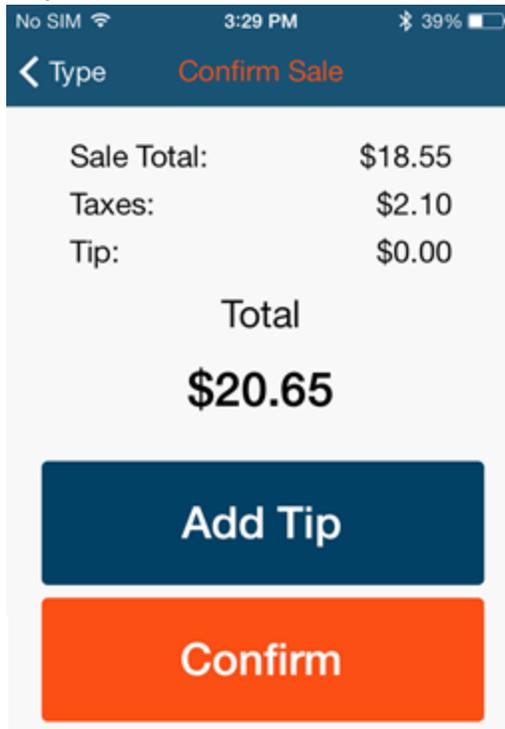5. Hand device to customer so they can tap **Add Tip** (shows if enabled in Settings> Processing Options).

a. The customer can enter a $ amount, move the slider to select a tip by percentage, or tap one of the preset tip percentages.
b. Tap **Done**.

6. Tap **Confirm**.

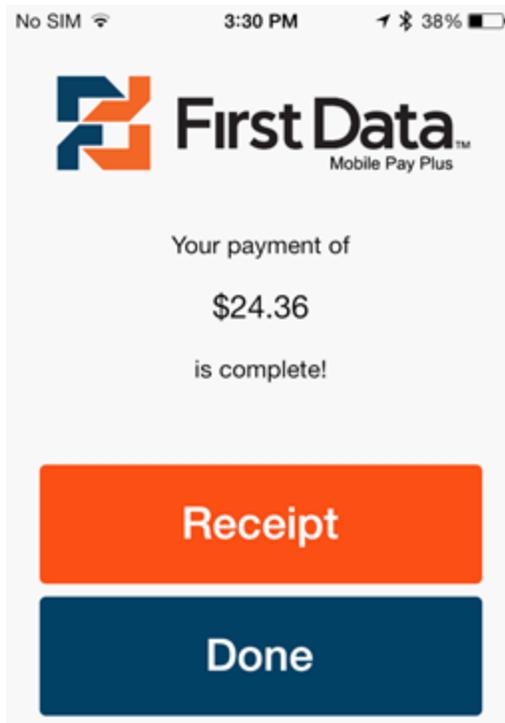7. Tap **Debit**.

8. The App shows: Pin pad ready. Pass the PIN pad to customer and tap **Pay**.
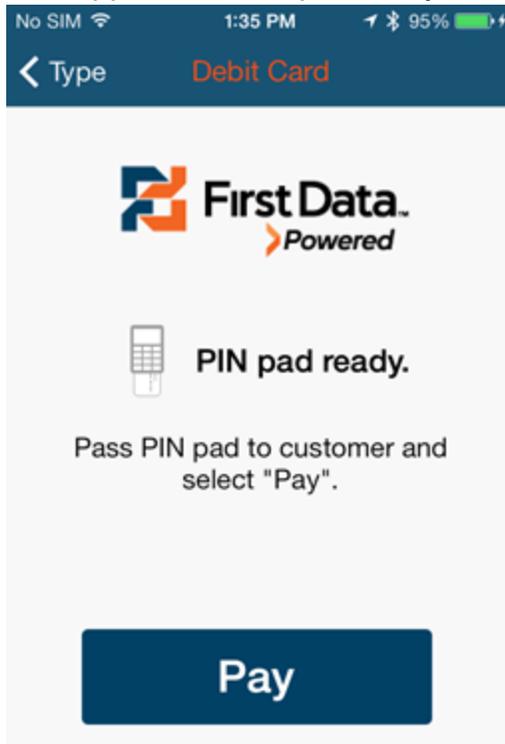
9. Ask the customer to follow the prompts on the PIN pad—the app shows: Transaction processing...

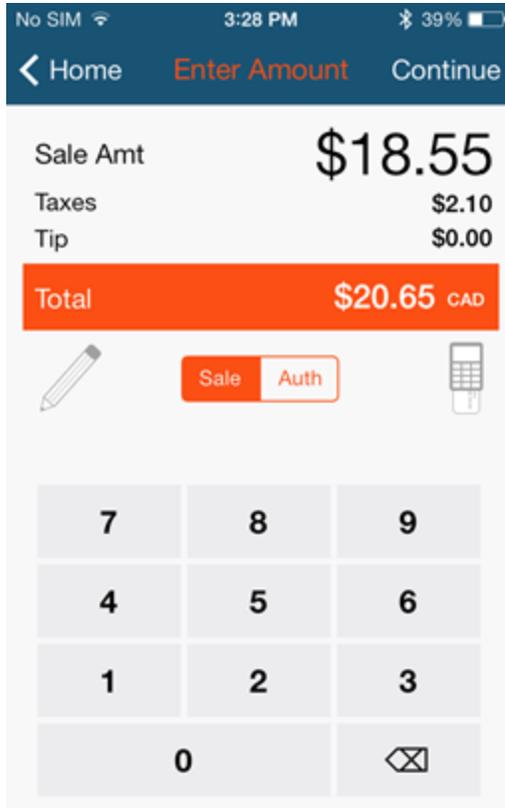After the transaction processes, the app shows the payment is complete.

If the transaction is **Declined**, try reprocessing it. If the transaction is declined a second time, follow up with your customer.

10. Tap **Done** to complete the transaction OR if the customer wants one, tap **Receipt** and do one of the following:

- If the customer wants the receipt emailed to them, enter their **Email Address**.

- Tap **Printer**: Select a Printer, adjust the number of copies, and then tap **Print**. **Note**: AirPrint enabled printers are supported.

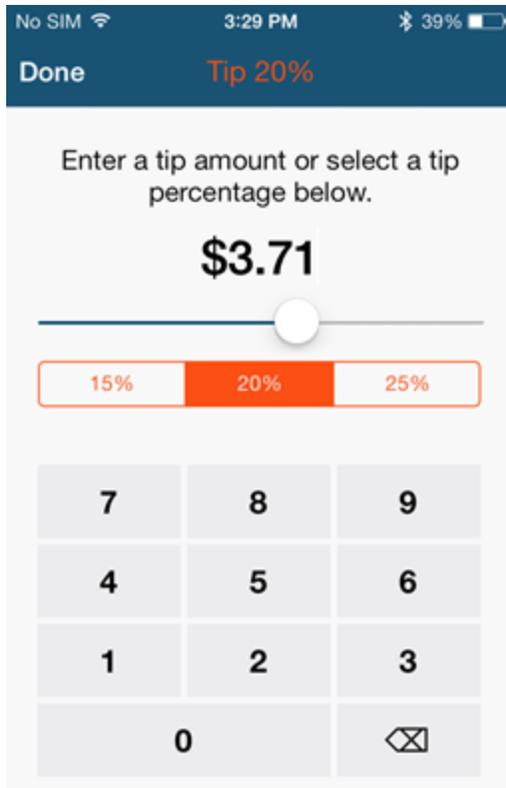11. Tap **Done**.

4.4 PROCESS CASH SALES

1. Open the app and tap **Sale**.
2. Enter the **Sale Amt**.

3. You can tap to add a **Note** or **Order Number** (must be enabled in Settings> Processing Options). Tap **Sale** to exit the screen.
4. Tap **Continue**.
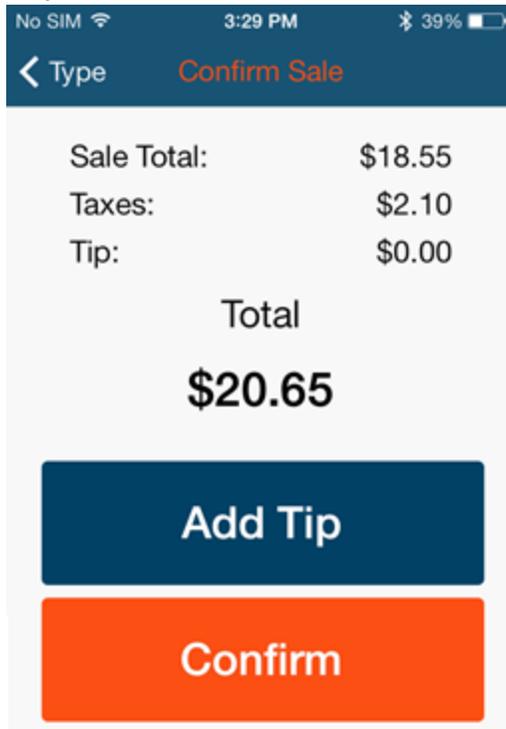5. Hand device to customer so they can tap **Add Tip** (shows if enabled in Settings> Processing Options).

a. The customer can enter a $ amount, move the slider to select a tip by percentage, or tap one of the preset tip percentages.
b. Tap **Done**.

6. Tap **Confirm**.

7. Tap **Cash**.

8. Enter the **Amount Received**. The **Change** amount adjusts automatically.

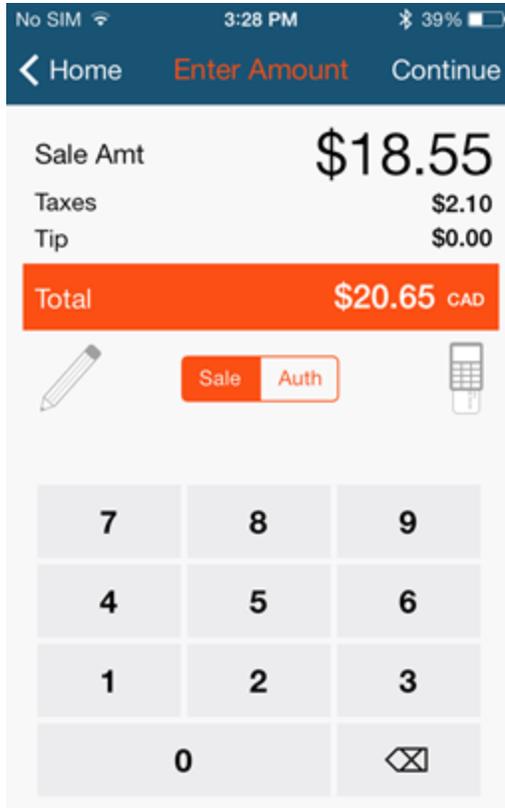9. Tap **Continue**.

10. Tap **Done** to complete the transaction OR if the customer wants one, tap **Receipt** and do one of the following:

   - If the customer wants the receipt emailed to them, enter their **Email Address**.

   - Tap **Printer**: Select a Printer, adjust the number of copies, and then tap **Print**. **Note**: AirPrint enabled printers are supported.
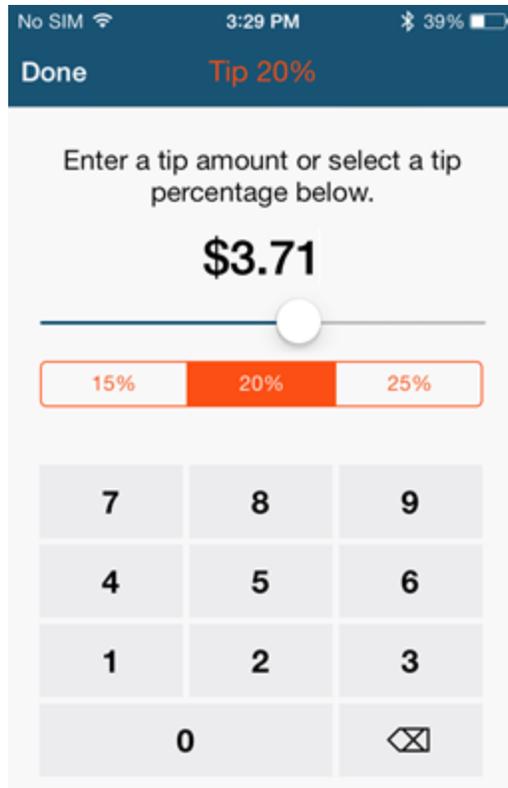
11. Tap **Done**.

4.5 PROCESS CHECK SALES

1. Open the app and tap **Sale**.
2. Enter the **Sale Amt**.

3. You can tap ![pencil] to add a **Note** or **Order Number** (must be enabled in Settings> Processing Options). Tap **Sale** to exit the screen.
4. Tap **Continue**.
5. Hand device to customer so they can tap **Add Tip** (shows if enabled in Settings> Processing Options).
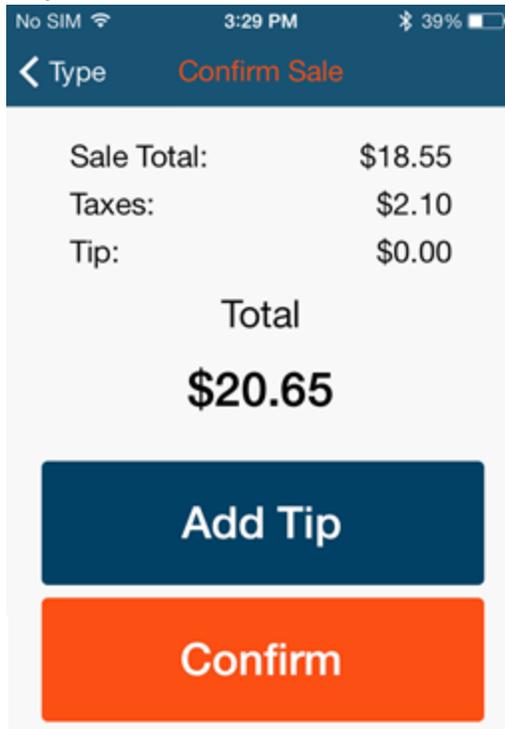
a. The customer can enter a $ amount, move the slider to select a tip by percentage, or tap one of the preset tip percentages.
b. Tap **Done**.

6. Tap **Confirm**.

7. Tap **Check**.

8. Enter the **Check Amount**—must be the same as the **Total**.

9. Enter the **Account Holder's Name** and **Check Number**.

10. Tap **Continue**.
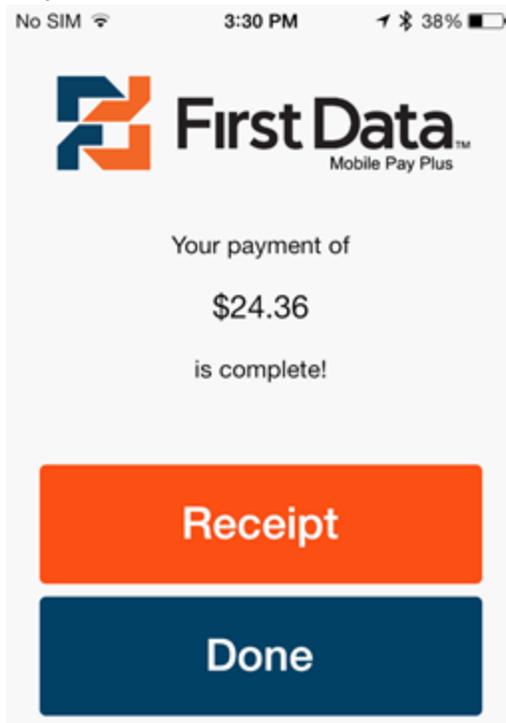
11. Tap **Done** to complete the transaction OR if the customer wants one, tap **Receipt** and do one of the following:

   - If the customer wants the receipt emailed to them, enter their **Email Address**.

   - Tap **Printer**: Select a Printer, adjust the number of copies, and then tap **Print**. **Note**: AirPrint enabled printers are supported.

12. Tap **Done**.

5 PROCESSING PRE-AUTHORIZATIONS

With Mobile Pay Plus processing, you can only process a credit card pre-authorization completion for the full amount of the pre-authorization hold, not a portion.

A pre-authorization has two steps. The first is the actual pre-authorization transaction, where the purchase amount is applied to the customer's credit card as a hold. There are two options to process a pre-authorization:

- Step 1 - Processing Pre-Authorizations with iCMP – Complete a pre-authorization using the app and the iCMP device.

- Step 1 - Keyed Pre-Authorization (No Device) – Complete the first step of a pre-authorization by keying in the card details. This step is best if you have the app, but no iCMP device.

You must complete the second step within a few days. Card associations have established protocols for this process, preventing the holding of customer's money beyond a reasonable time. This transaction completes the pre-authorization by removing the held funds from the customer's credit card.
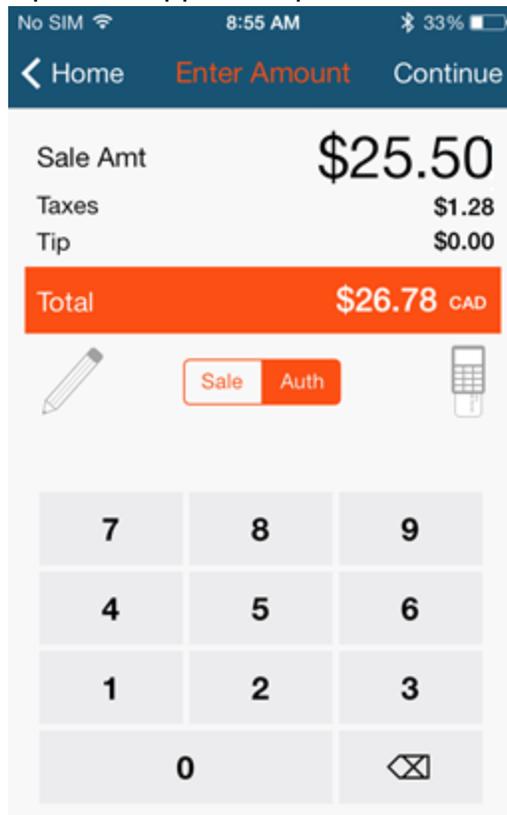
- Step 2 - Pre-Auth Completion

You can also process a pre-authorization through the Online Member area even if the initial transaction occurred through the app.

- Processing Pre-authorizations in the Online Member Area

5.1 STEP 1 - PROCESS PRE-AUTHORIZATIONS WITH ICMP DEVICE

The [Sale Auth] button only shows if Pre-Authorizations are enabled in Settings> Processing Options.

1. Open the app and tap **Sale**.

2. Tap **Auth**.
3. Enter the pre-authorization **Sale Amt**.

4. You can tap [pencil icon] to add an **Order Number** or **Note** (must be enabled in Settings> Processing Options). Tap **Sale** to exit the screen.
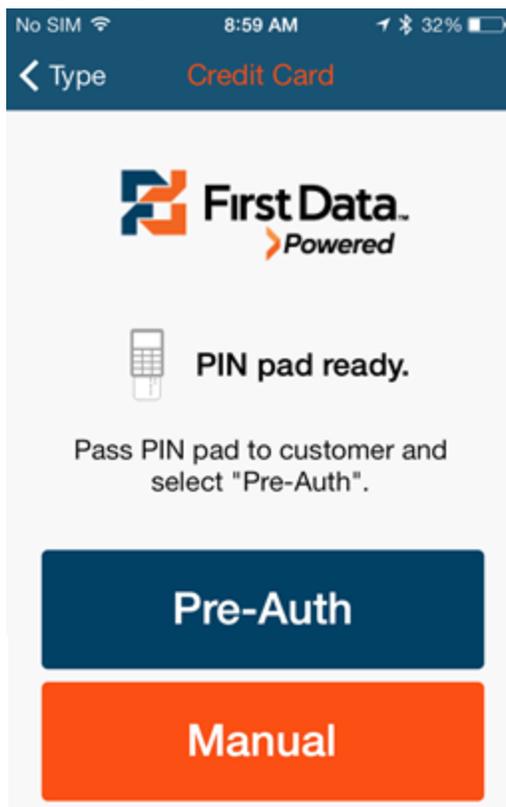
5. Tap **Continue**.
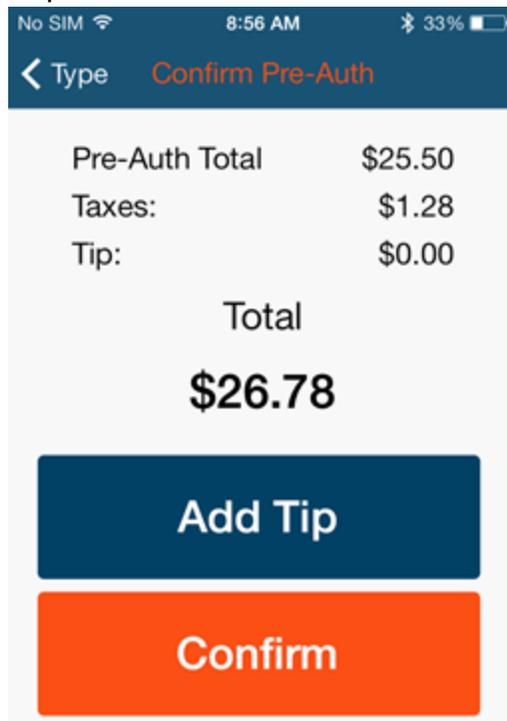
6. Hand device to customer so they can tap **Add Tip** (shows if enabled in Settings> Processing Options).
    a. The customer can enter a $ amount, move the slider to select a tip by percentage, or tap one of the preset tip percentages (if enabled).
    b. Tap **Done**.
7. Tap **Confirm**.

8. The App show: PIN pad ready. Pass the PIN pad to the customer and tap **Pre-Auth**.

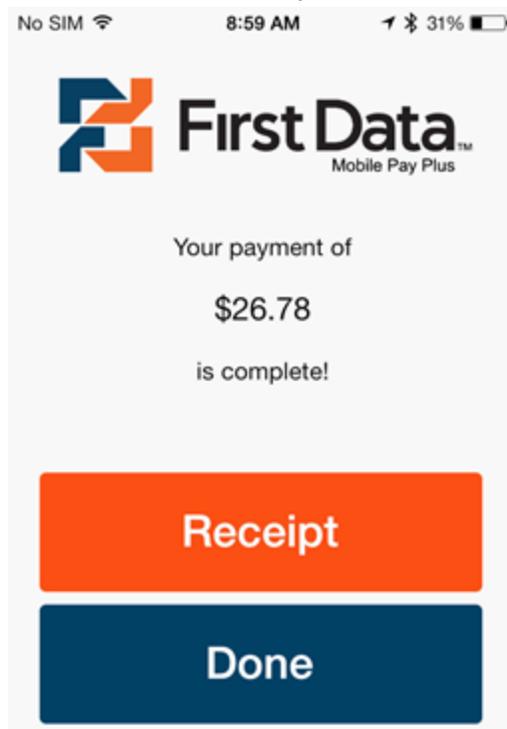9. Ask the customer to follow the prompts on the PIN pad—the app shows: Transaction processing...

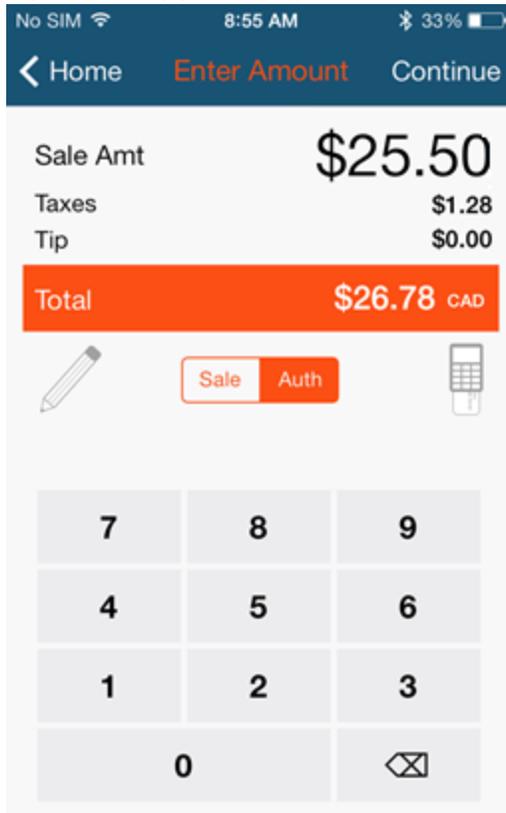After the transaction processes, the App show the payment is complete.

10. Tap **Done** to complete the transaction OR if the customer wants one, tap **Receipt** and do one of the following:

- If the customer wants the receipt emailed to them, enter their **Email Address**.

- Tap **Printer**: Select a Printer, adjust the number of copies, and then tap **Print**. **Note**: AirPrint enabled printers are supported.

11. Tap **Done**.

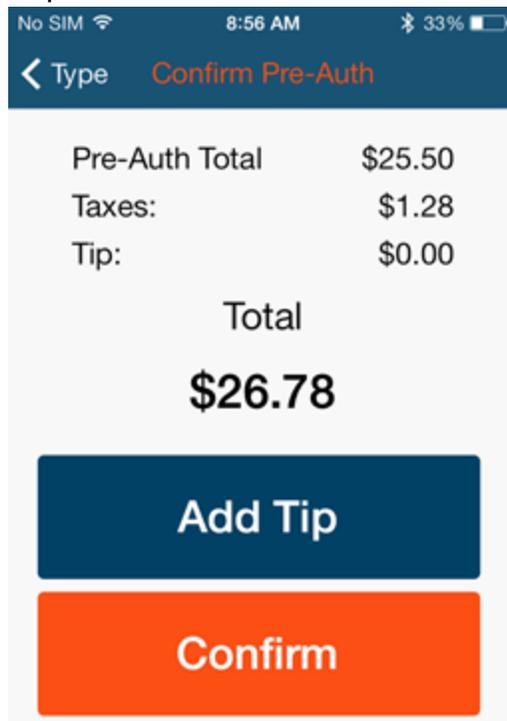## 5.2 STEP 1 - KEYED PRE-AUTHORIZATION (NO DEVICE)

The [Sale Auth] button only shows if Pre-Authorizations are enabled in Settings> Processing Options.

1. Open the app and tap **Sale**.

2. Tap **Auth**.
3. Enter the pre-authorization **Sale Amt**.

4. You can tap [pencil icon] to add an **Order Number** or **Note** (must be enabled in Settings> Processing Options). Tap **Sale** to exit the screen.
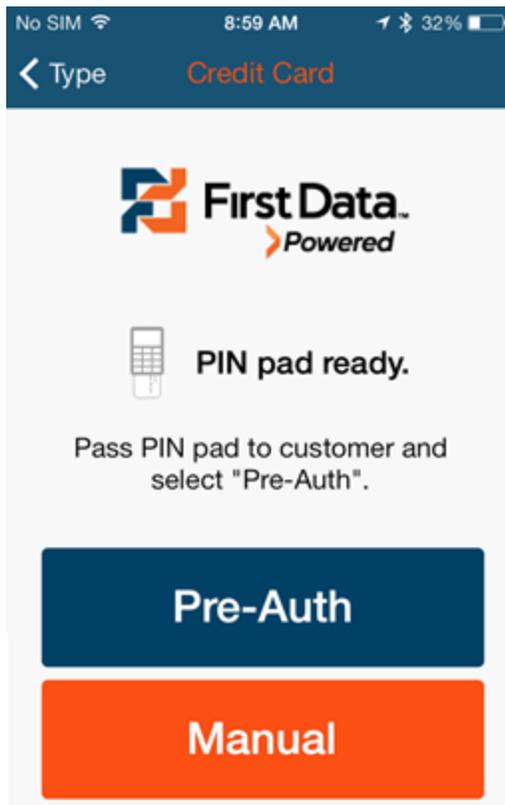
5. Tap **Continue**.

6. Hand device to customer so they can tap **Add Tip** (shows if enabled in Settings> Processing Options).
   a. The customer can enter a $ amount, move the slider to select a tip by percentage, or tap one of the preset tip percentages (if enabled).
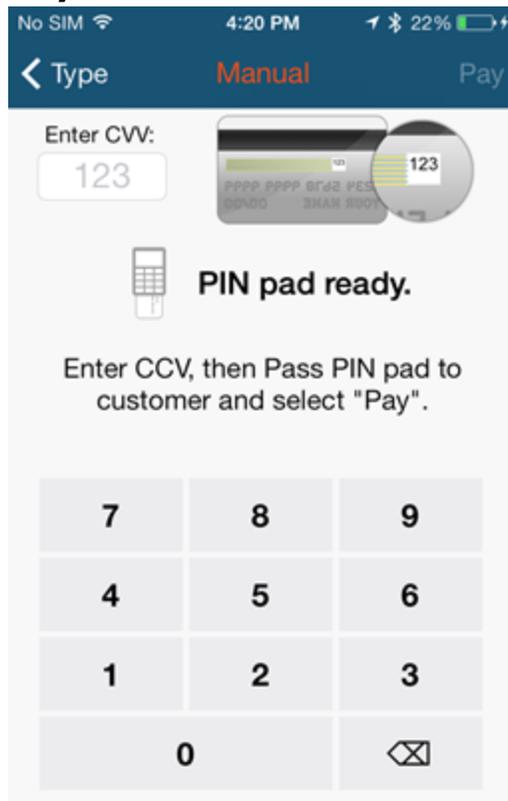   b. Tap **Done**.
7. Tap **Confirm**.

8. The App shows: PIN pad ready. Pass the PIN pad to the customer and tap **Manual**.

9. Enter the **CVV** number from the back of the customer's card and then tap **Pay**.
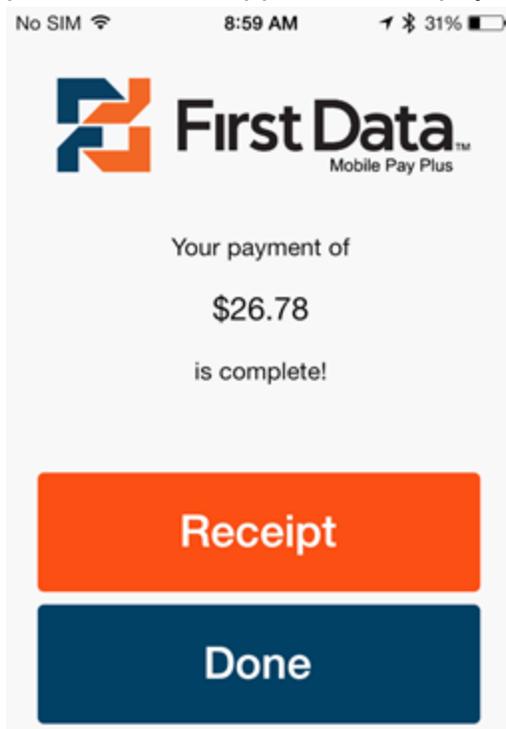

10. Ask the customer to follow the prompts on the PIN pad. They need to enter their **Card Number** and **Expiry Date** (MMYY). After the transaction

processed, the App shows the payment is complete.

11. Tap **Done** to complete the transaction **OR** if the customer wants one, tap **Receipt** and do one of the following:

- If the customer wants the receipt emailed to them, enter their **Email Address**.

- Tap **Printer**: Select a Printer, adjust the number of copies, and then tap **Print**. **Note**: AirPrint enabled printers are supported.

12. Tap **Done**.

5.3 STEP 2 - PROCESS PRE-AUTHORIZATION COMPLETION

To meet credit card association protocols, the pre-authorization completion must be processed within a few days of the first pre-authorization step (of holding customer funds.
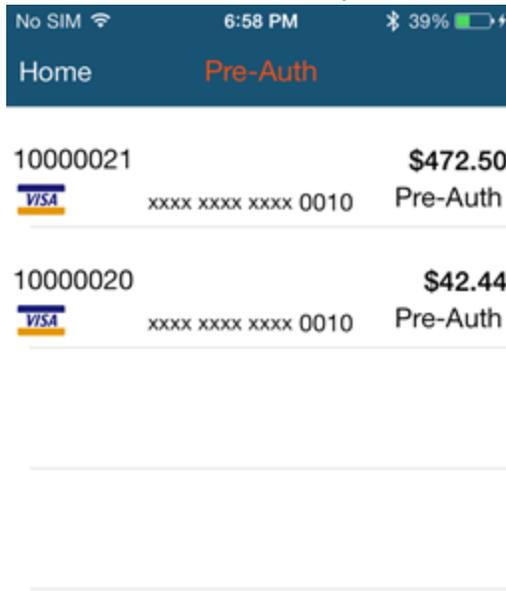
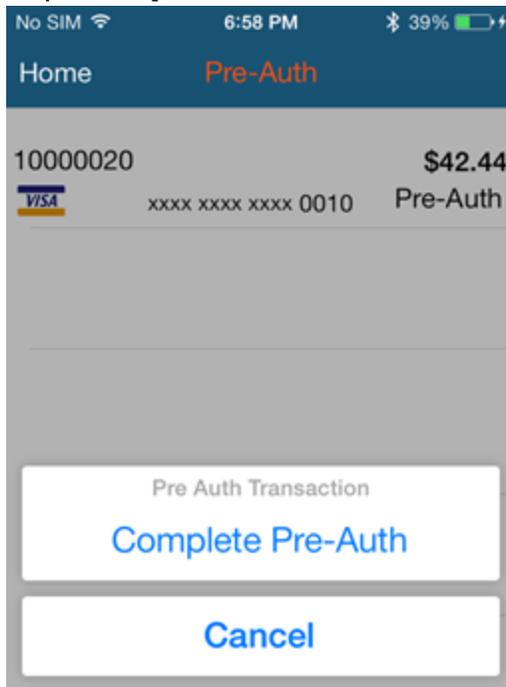1. Go to the Mobile Pay Plus Home screen and tap **Pre-Auth Completion**.
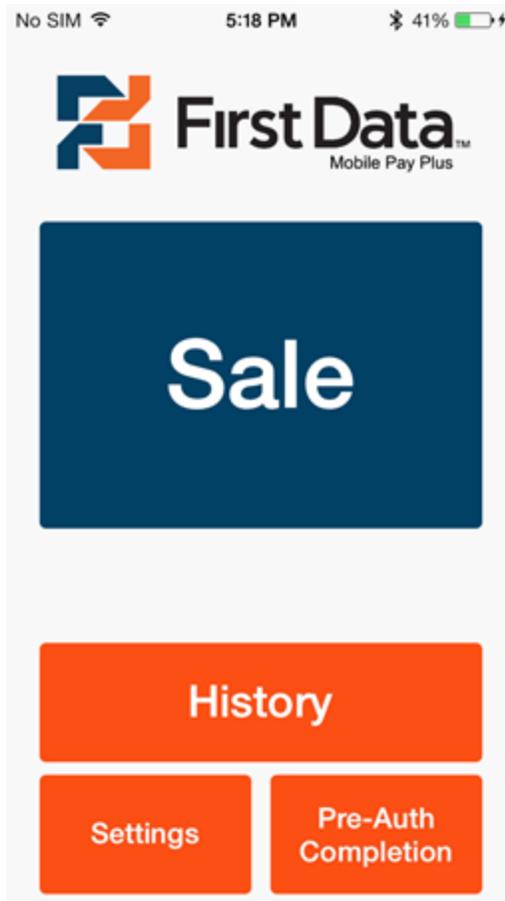
2. In the **Pre-Auth** list, tap the transaction you want to complete.

3. Tap **Complete Pre-Auth**.

4. When the **Transaction Approved** message opens, tap **OK**.

5.4 PROCESSING PRE-AUTHORIZATIONS IN THE ONLINE MEMBER AREA

1. Log in to the online member area at:
   https://www.beanstream.com/admin/sprout_sDefault.asp
2. On the menu, click *Administration> Processing> Web Terminal*.
3. Enter the **Card Number, Expiration Date, CVV/CVC2, Transaction type, Sale Amount**.
4. Optional: Enter your customer's email address (to send a receipt by email), street address information, and phone number.
5. Click **Submit Transaction**. Check for an Approved response. If you see Transaction Declined in the response field, you need to follow up with your customer.

6 TRANSACTION TROUBLESHOOTING

These are a few solutions to situations that may arise while using the Mobile Pay Plus app.

Invalid XML format (Code(null)) error

If you get the *Invalid XML format (Code(null))* error after submitting a transaction, you may have special characters in one of the input fields—Notes, Order Number, Name, Cheque Number, Amount Received, and so on.

Go back and remove any special characters from these fields.

I cannot complete a transaction

Usually, a simple on-screen message should explain why you cannot complete a transaction. This occurs if the customer has an invalid card or if you have a keyed entry error. However, if you consistently cannot process transactions, you may be experiencing a system setup or configuration issue.

What if I receive a call during a transaction?

The Mobile Pay Plus app is designed to suspend and allow you to take to calls. After the call is completed, the app takes you back to where you were.

7 PROCESS REFUNDS

You can process Refunds for debit card, credit card, cash, and check transactions.

1. Open the app and tap **History**. The Find Transaction screen opens.

2. Tap **30 Days**, **60 Days**, or **90 Days**, or enter search criteria for one of these options:

   - **Last four digits of card**
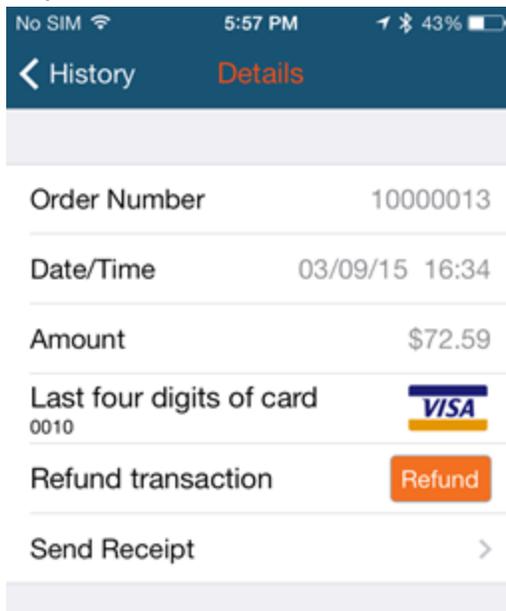
   - **From**

   - **To**

3. Tap **Search**.

4. You can refine your transaction search by tapping:

- **Date**: to sort the list by date and time.

- **Amount**: to sort the list by transaction amount.

- **Search**: to sort by date/time/amount.

5. Tap a transaction. The Details screen opens.

6. Tap **Refund**. The App shows: PIN pad ready. If this is a debit or credit card refund, pass the PIN pad to the customer.

7. Tap **Issue Refund**. If this is a debit or credit card refund, ask the customer to follow the prompts on the PIN pad.

8. Tap **Done** to complete the transaction OR if the customer wants one, tap **Receipt** and do one of the following:
    - If the customer wants the receipt emailed to them, enter their **Email Address**.
    - Tap **Printer**: Select a Printer, adjust the number of copies, and then tap **Print**. **Note**: AirPrint enabled printers are supported.

9. Tap **Done**.

8 VIEW TRANSACTION HISTORY

On the iPhone

1. Open the app and tap **History**. The Find Transaction screen opens.

2. Tap **30 Days**, **60 Days**, or **90 Days**, or enter search criteria for one of these options:

   - **Last four digits of card**

   - **From**

   - **To**

3. Tap **Search**.

4. You can refine your transaction search by tapping:

- **Date**: to sort the list by date and time.

- **Amount**: to sort the list by transaction amount.

- **Search**: to sort by date/time/amount.

5. Tap a transaction. The Details screen opens.
6. You can Refund a transaction.

Through the Online Member Area

1. Log in to the online member area at:
   https://www.beanstream.com/admin/sprout_sDefault.asp
2. On the menu, click *reporting/analysis> transaction report*.
3. Use the search and sort fields at the top of the screen to select report criteria and then click **Refresh** (bottom of screen). The list opens with basic

transaction details, including the credit card transaction (CC) approval ✔ or decline ✘ .

4. To download the transaction report, click **Download**. The file is in **.csv** format so you can open it as an Excel, Word, or custom file format.
5. To view transaction details, click a line item.

You can also go to *reporting/analysis> transaction search* in the left menu to view or download transaction details.