



# First Data

## Mobile Pay<sup>TM</sup> for Android<sup>TM</sup> Tablets

\*Android Version 4.0 or higher required



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# Introduction

## Overview

First Data Mobile Pay™ Solution turns an Android device into a mobile point of sale. This streamlined application is geared towards small and mid-sized merchants, and can be used in any number of venues — storefront or mobile. From a local in-store apparel shop or eatery, to an art dealer participating in a local festival, to a tow truck or taxi, it's an affordable, secure way to take payments. It's also ideal for seasonal merchants who may not need year-round coverage but do need a reliable service when business picks up.

First Data Mobile Pay has eight major functions:

Credit card sale (Swiped)	Digital receipt delivery
Credit card sale (Manually keyed)	Signature capture
Transaction refund	Inventory item setup
Transaction history report	Barcode scanner

## Key Features

- Add items with set prices, descriptions and photos
- Data stored in cloud and shared across devices
- Barcode scanner
- Transaction reporting
- Cash transaction tracking and receipts
- Check Recording
- Sales history in app
- Sales tax and tip settings in app
- Auto-send receipts to merchant
- Option to print paper receipts
- Encrypted card reader



# Getting Started

## Download First Data Mobile Pay™

If you haven't downloaded the First Data Mobile Pay Solution app to your device you can do so by searching for First Data Mobile Pay Solution in the Google Play Store.

Note: A Google account is required to download apps from the Google Play Store. Please [click here](#) for more information on creating a Google account.

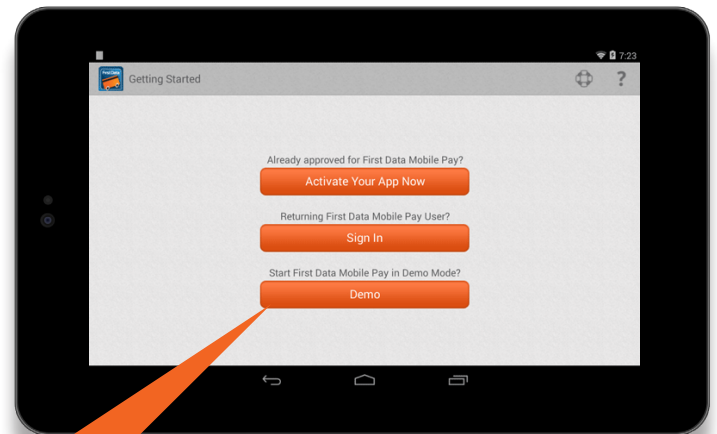


Click the icon above to visit the First Data Mobile Pay Play Store page.

## Demo Mode

When you launch First Data Mobile Pay Solution for the first time, you may use Demo mode to familiarize yourself with all of the features available in First Data Mobile Pay before activating your software. Once you activate your app, demo mode will no longer be available.

Please be advised that while in Demo mode, any inventory items that you add will not be saved and any transactions that you perform will not be processed.





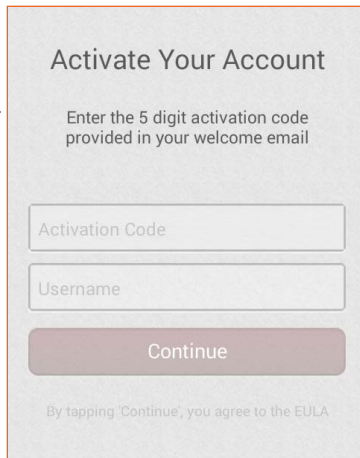
# Getting Started

## Activate First Data Mobile Pay™

To activate your app, you will need the 5 digit 'Activation Code' found in your welcome email along with your email address\* that you used to sign up for First Data Mobile Pay Solution.

\*Note: For sub-users combine your activation code with the user name displayed in your activation email.

1. Launch First Data Mobile Pay Solution.
2. Enter your 5 digit Activation Code.
3. Enter your Username (email address).
4. Tap Continue.



## Choose a password

Next, you'll be prompted to create a password for your First Data Mobile Pay Solution app. Passwords must have a minimum length of eight characters with at least one number and one letter.

1. Enter your new password.
2. Confirm your new password.
3. Tap Continue.

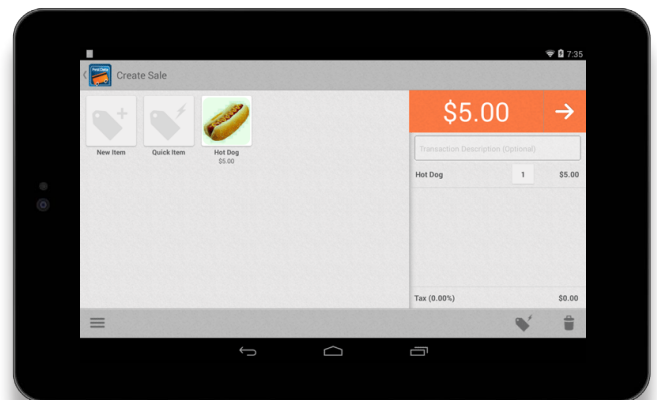
## Card reader

If you are using a card reader with First Data Mobile Pay Solution, simply plug the card reader into your device headphone jack.

## Security questions

If you ever need to reset your First Data Mobile Pay Solution password, we will ask you a series of security questions to verify your identity. You will need to choose 3 questions and enter 3 answers.

1. Choose 3 security questions, and enter answers for your chosen questions.
2. Tap Activate Account.
3. Tap Get Started.



**Congratulations! You are now ready to process credit card transactions!**



# Getting Started

## Administrator and Sub-user Roles

First Data Mobile Pay Solution now allows a business owner, or 'administrator' which is the default user account boarded to a merchant account, to have the ability, via a new feature within the settings drawer, to choose to control or not control various aspects of their associated users (sub-users) application settings. These controls, when 'auto-sync' (please refer to *Sync Settings*) is applied to an administrator, include the following:

- Tax settings controlled by administrator – Both administrators and sub-users can create and name tax rate instances (multiple can be applied). If auto-sync is turned on, the associated sub-users will only be able to access and utilize the admin created tax rates, additionally a sub-user can decide to turn a rate on or off in the context of a transaction, but cannot modify the associated rate or name if it is created by an admin.
- Turn on / off tips – Only an administrator can activate 'tip acceptance mode'. When tips are turned on by an administrator, tips will be included in the transaction flow for their associated sub-users.
- Turn on carbon copy receipts and add recipients – Only an administrator can turn on and apply recipients to receipts of transactions that are carbon copy emailed or SMS text messaged, such as themselves or a company accountant.
- Turn on / off invoice number requirement – Only an administrator can enforce a custom invoice number policy for each transaction, making an invoice number required for a transaction processed by their associated sub-users if they choose. If this functionality is turned on and a sub-user does not enter an invoice number, the system will auto generate one.
- Geo-location controlled by admin – Only an administrator can turn on or off geo-location tracking at the point of transaction on their associated sub-user transactions.

## Inventory Controlled by Administrator

Only the account administrator will be able to manage, modify and create inventory items for their user base. When an administrator creates, deletes or modifies an inventory item, their associated users (sub-users) will receive these changes to their device and the merchant portal in real time.

Please note that this functionality is not dependent on having auto-sync turned on.



# Using First Data Mobile Pay™

## Sale Screen Overview

The First Data Mobile Pay sale screen consists of 5 main components:

- Item Window
- Item Cart
- Function Buttons
- Checkout Button
- Options and Settings Menu





# Using First Data Mobile Pay™

## Item Window

The item window displays all of your current inventory items for sale and also allows you to add quick items or add new inventory items.

### Existing Items:

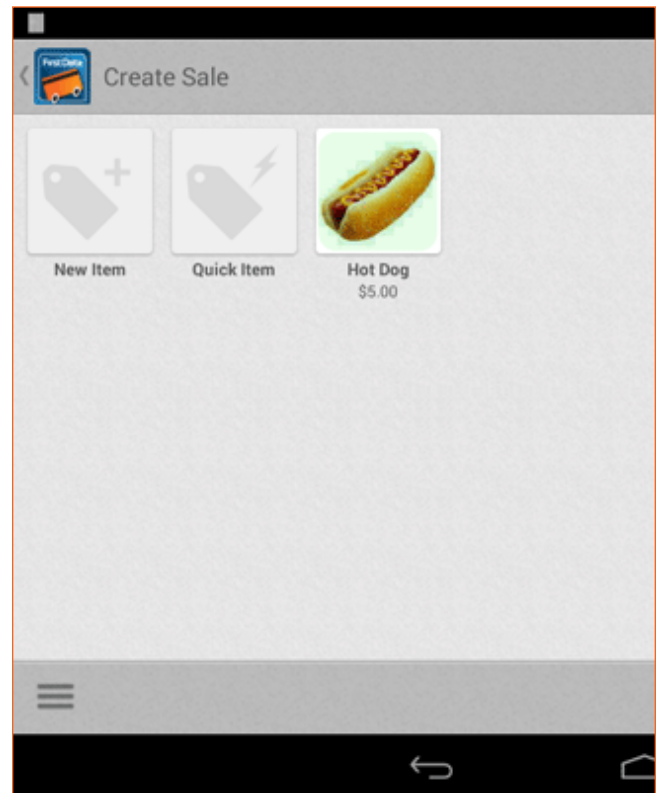
To add an existing item to the cart, simply tap the item on the screen.

### Quick Item:

1. Tap Quick Item
2. Enter a price for the item and choose if it is taxable
3. Enter a description of the item (optional)
4. Tap Add Item

### Add New Item:

Please see *Add New Items*.



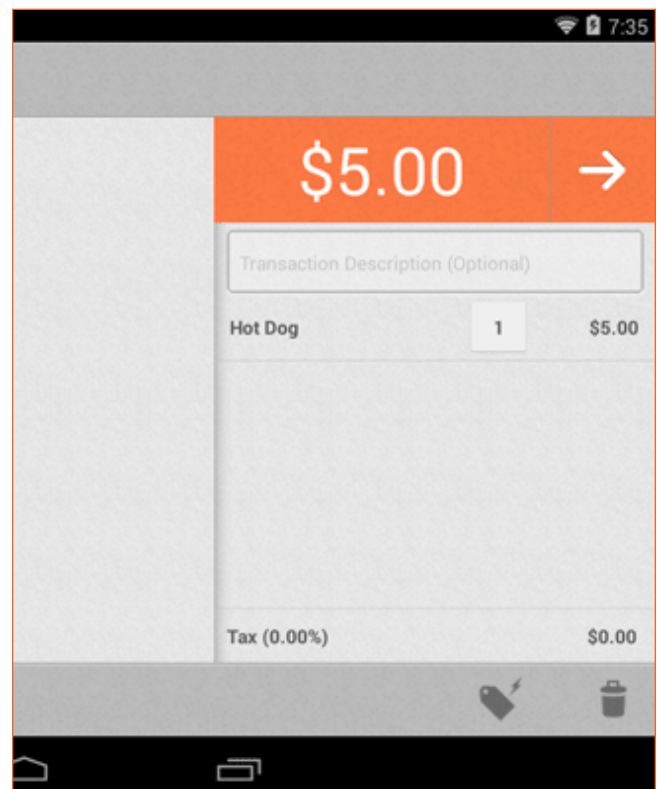
Item Window

## Item Cart

The item cart displays all items and quantities included in the current transaction, the tax amount, and the total dollar amount for the sale. You may also add an optional Transaction Description.

When items are displayed in the cart, you can modify the quantity of those items by tapping the quantity button in the item list.

Invoice numbers can also be enabled in the application settings if you would like to add an invoice number to each transaction. Please see *Invoice Numbers*.



Item Cart



# Using First Data Mobile Pay™

## Checkout Button



The checkout button is used to advance through the various screens during a transaction.

If you are using a card reader with First Data Mobile Pay, swiping the customer's credit card after all items have been added to the cart will automatically progress you through to the signature screen.

## Function Buttons



### Sales History:

Tap the sales history icon to view transaction sales history, resend receipts and issue refunds.



### Scan Barcode:

Tap the barcode icon to scan items that exist in your current inventory.



### Quick Item:

Tap the quick item icon to add a quick item to a transaction.



### Cancel Transaction:

Tap the trashcan icon at any stage of a transaction to cancel the transaction.



### Refund Transaction:

Tap the refund icon from the sales history list to perform a refund.

## Options and Settings Menu

The options and settings menus allows you to manage inventory, view reports and configure many features within the First Data Mobile Pay application.

For quick access to the application settings, swipe the screen from left to right.

Please see *Reports* for more information on reports.

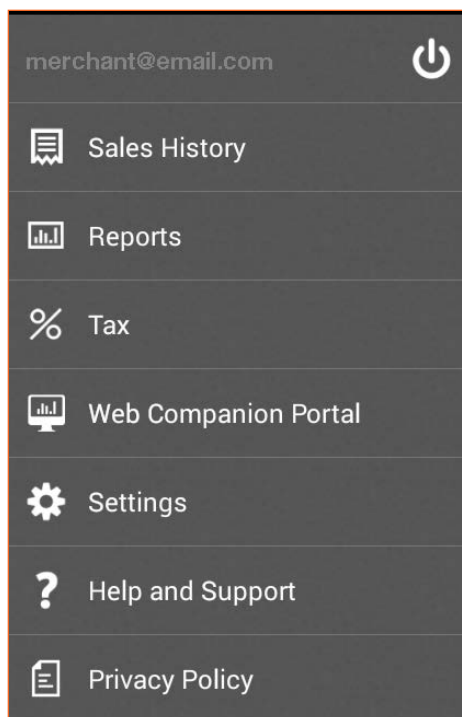
Please see *Item Maintenance* for more information on managing your items.

Please see *Settings* for more information on configuring features within the app.

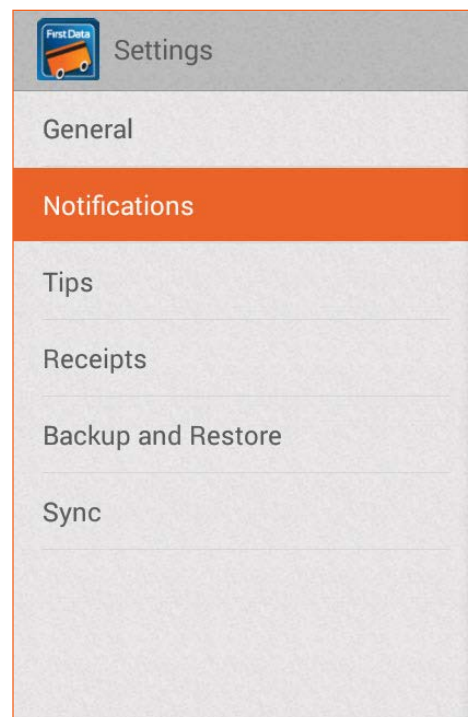
If you need help with First Data Mobile Pay, tap *Help*.

Tap *Web Companion Portal* to access the First Data Mobile Pay web portal.

Tap *Privacy Policy* to view or privacy policy.



Options Menu



Settings Menu



# Using First Data Mobile Pay™

## Email Receipts

After completing transactions, you have the ability to send electronic receipts to your customers. You can send SMS receipts, email receipts or both.

Tap the Email box to send an email receipt.



Tap the Contacts icon to select an email contact from your phonebook.

A screenshot of the 'Receipt' screen. At the top, it says 'Receipt' next to a receipt icon. Below that is a text input field with the placeholder 'Enter email address or mobile number'. To the right of the input field is a person icon and a plus sign. Below the input field, it says 'Message and data rates may apply.'

## Special Prompting

Some transactions will require you to enter additional information prior to processing.

### AVS (Address Verification):

Whenever you process a manual sale with the card not present, you will be prompted to enter the billing address of your customer.

A screenshot of the AVS screen. It says 'Enter the billing address here since the card is not present.' Below this is a text input field with the placeholder 'Billing Address (Optional)'.

### Commercial Cards:

If a customer uses a purchase card for a transaction, you may be prompted to enter Tax and customer code information.

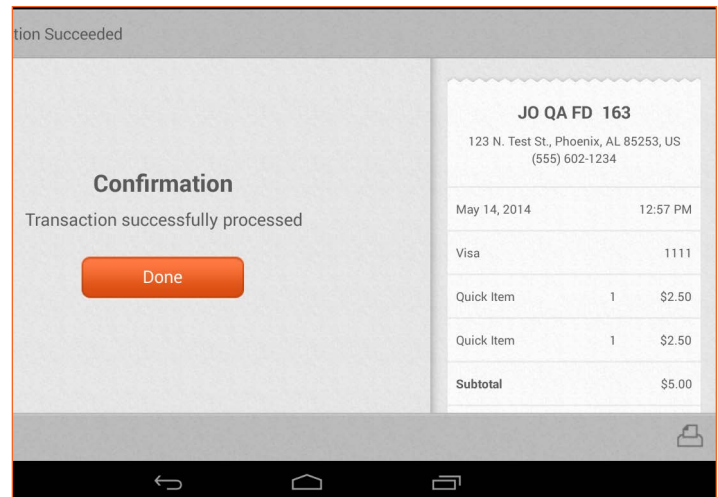
A screenshot of the 'Commercial Card' screen. At the top, it says 'Commercial Card' and 'Continue'. Below this is a text input field with the placeholder 'Enter a percentage to include state and local taxes to this purchase.' Below this is a toggle switch for 'Tax Exempt' which is currently turned on (red). Below that is a text input field for 'Tax Rate' with the value '0.0000 %'. Below that is a text input field for 'Customer Code (optional)'.



# Using First Data Mobile Pay™

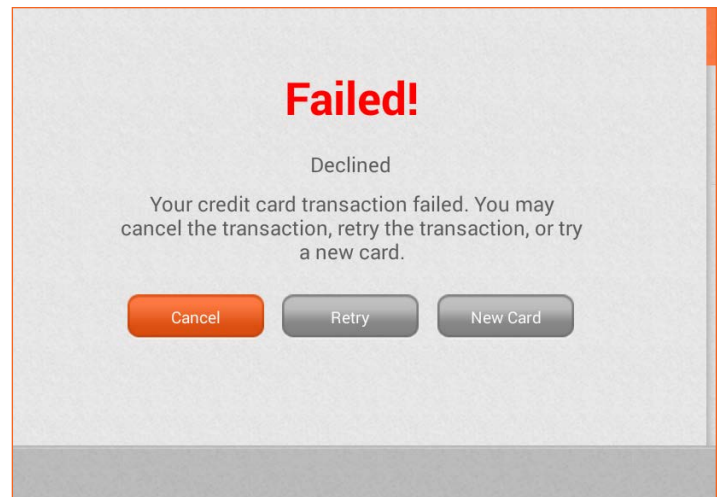
## Approved Transaction

Once a transaction is approved, a receipt will be displayed on the screen.



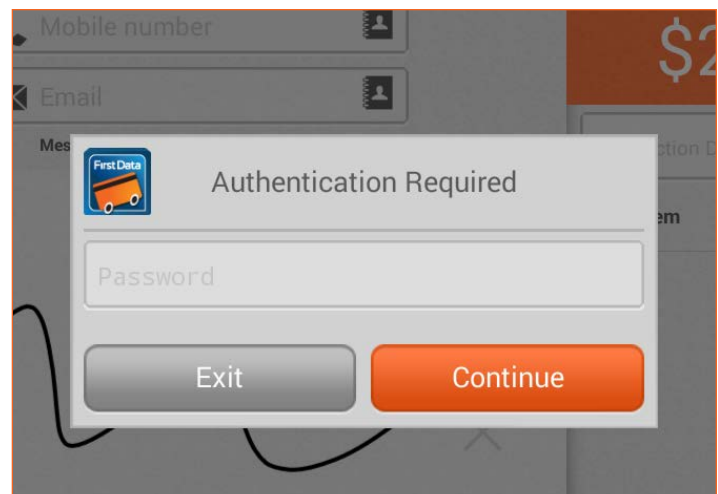
## Declined Transaction

If a transaction is declined for any reason, you will be prompted to try the transaction again, use a new card, or cancel the transaction.



## Authentication Required

If you use multiple devices, you may be prompted to authenticate because users can only be logged into a single device at a time. This is especially true if you use the “Keep me signed in” option when logging into the app.

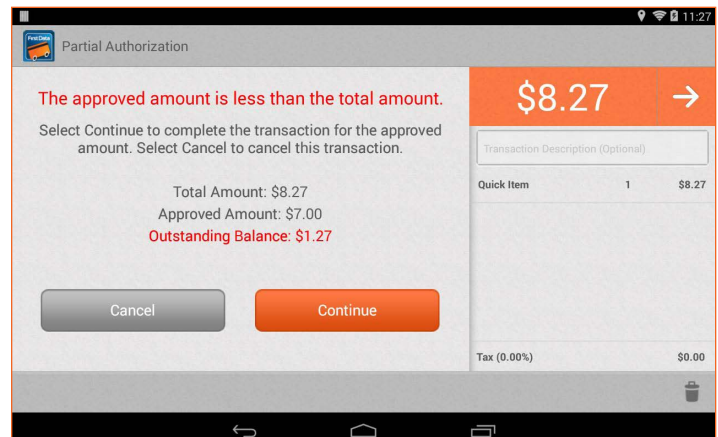




# Using First Data Mobile Pay™

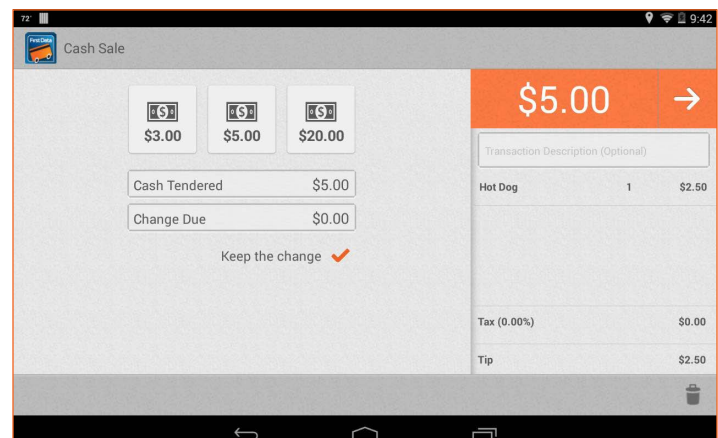
## Partial Authorization

A partial authorization partially approves a transaction if a cardholder does not have enough credit or funds available on their credit or debit card to cover the transaction amount. You may then allow the cardholder to pay the remaining balance owed with another card or cash. Note: This is completed in two separate transactions. The first transaction for the approved amount and a second transaction for the remaining balance.



## Keep The Change

During a cash transaction, when tips are enabled, the customer has the option to select Keep The Change.

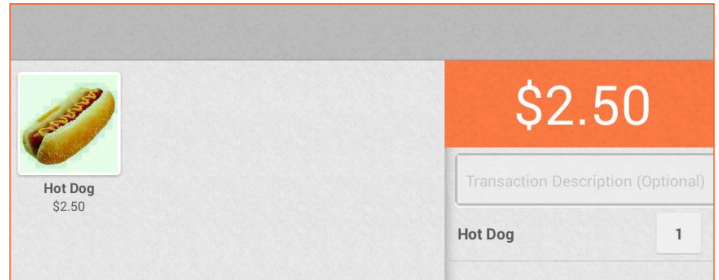




# Transactions

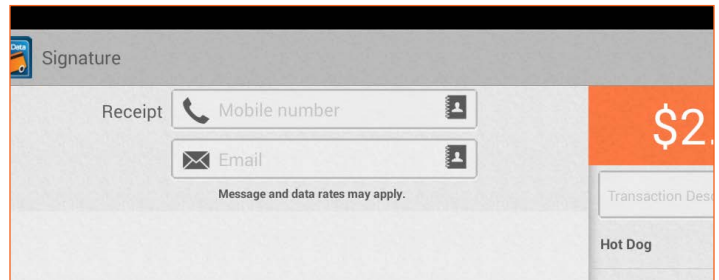
## Credit Card Sale

1. Add items to the item cart, and then swipe your customer's credit card through the credit card reader.



2. Enter your customer's mobile number, email address, or both in the boxes.

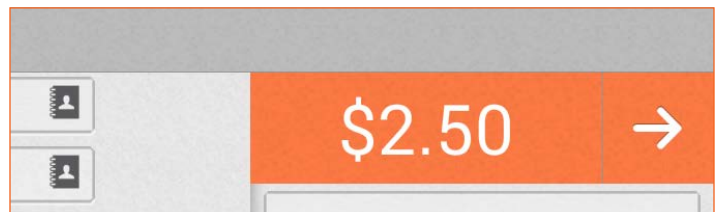
Note: After entering an email address or phone number, you may enter multiple recipients by tapping the '+' icon. Additionally, you may choose a contact from your address book by tapping the contacts icon.



3. Ask your customer to sign for the transaction.

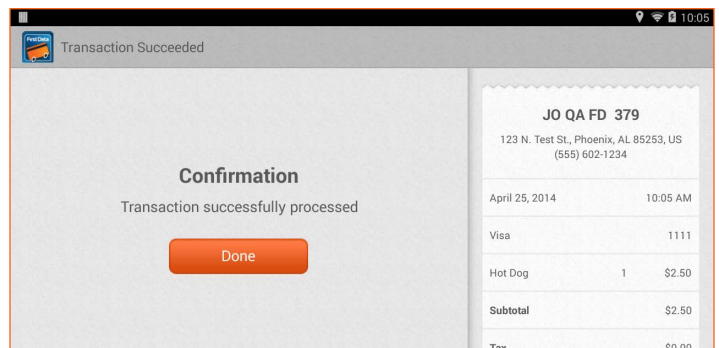


4. Tap the checkout button.



5. Once the transaction is approved, a digital copy of the receipt is displayed on the screen.

Tap Done to return to the sale screen.



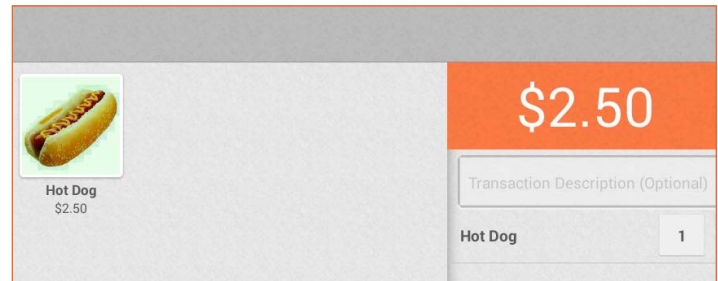


# Transactions

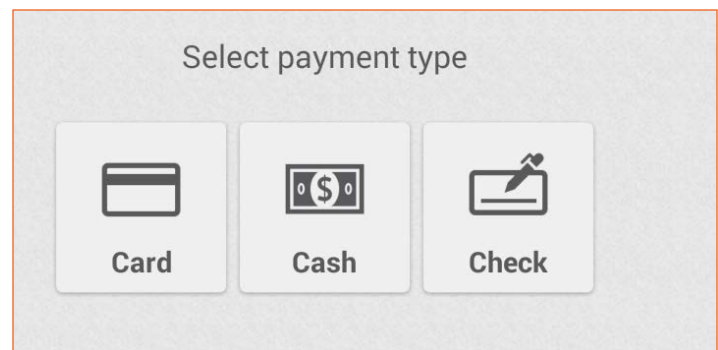
## Manual Credit Card Sale

You can still take a payment if the card does not swipe correctly, the card is not present, or you do not have your card reader with you. You can manually enter the customer's payment card information on your mobile device. Please remember that if you manually enter card information, you accept a higher risk of a chargeback. When a card does not swipe correctly, we suggest that you ask the customer for another card for payment. Follow these steps to process a manual credit card sale:

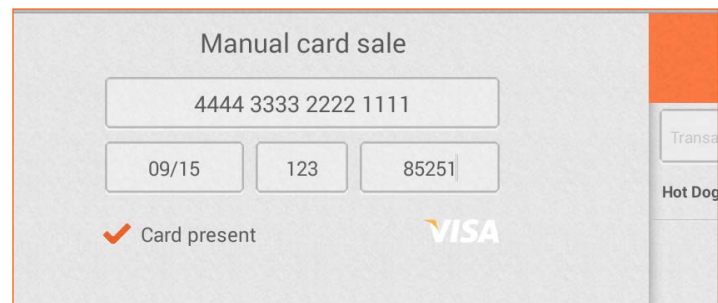
1. Add items to the item cart, and then tap the checkout button.



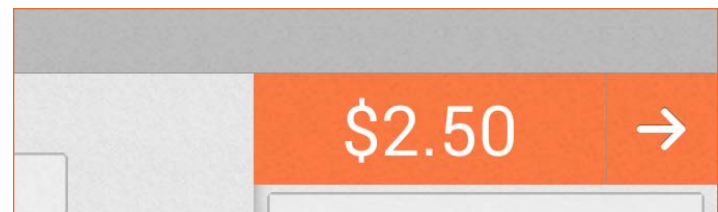
2. Tap the card icon.



3. Enter your customer's credit card number, expiration date, CVV, and Zip Code. You must also select whether the customer's credit card is present or not. If it is not present, you will be prompted to enter your customer's billing statement house number.



4. Tap the checkout button.

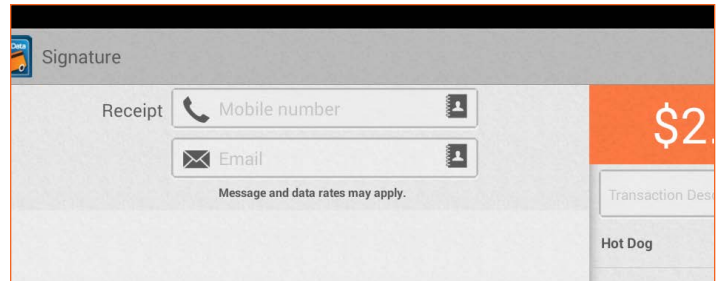





# Transactions

5. Enter your customer's mobile number, email address, or both in the boxes.

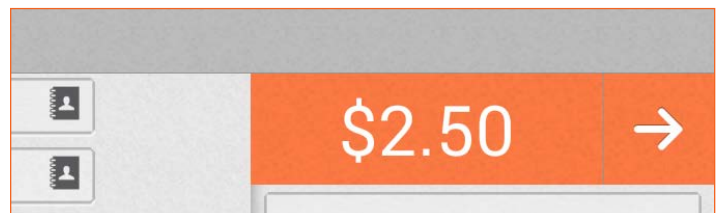
Note: After entering an email address or phone number, you may enter multiple recipients by tapping the '+' icon. Additionally, you may choose a contact from your address book by tapping the contacts icon.



6. Ask your customer to sign for the transaction.

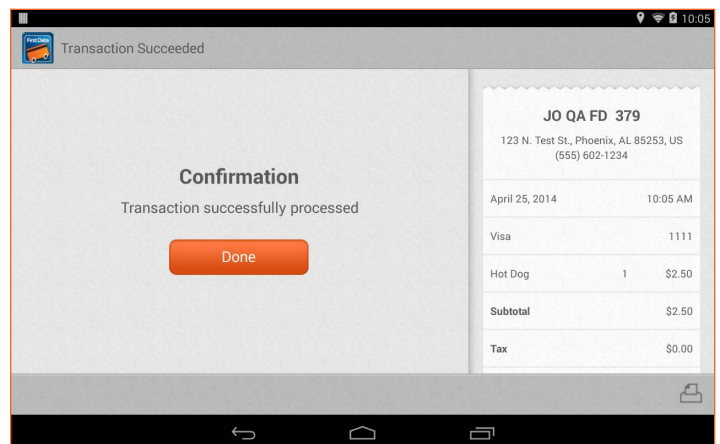


7. Tap the checkout button.



8. Once the transaction is approved, a digital copy of the receipt is displayed on the screen.

Tap Done to return to the sale screen.

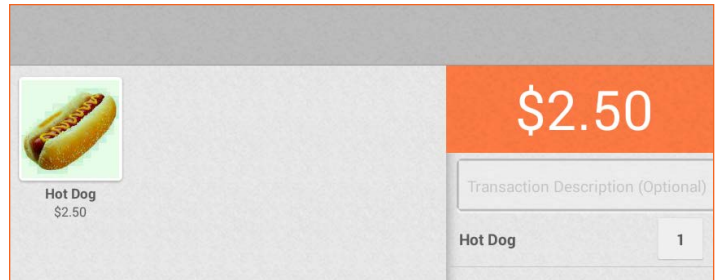




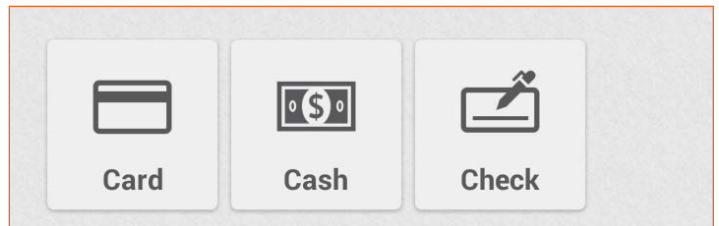
# Transactions

## Cash Sale

1. Add items to the item cart, and then tap the checkout button.

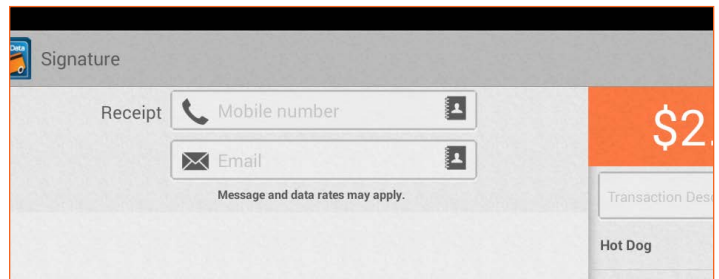


2. Tap the cash icon.

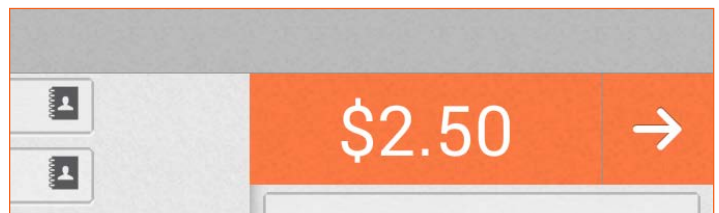


3. Enter your customer's mobile number, email address, or both in the boxes.

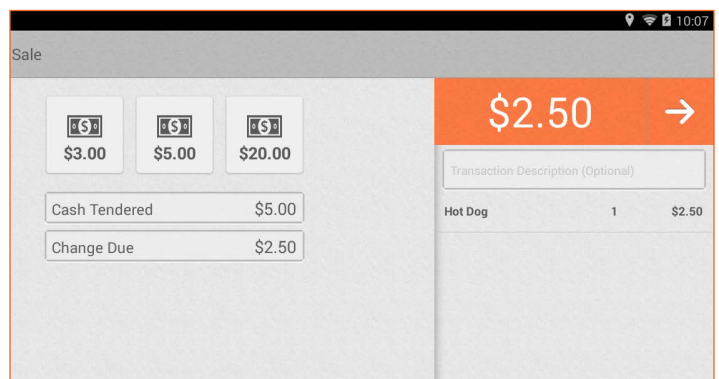
Note: After entering an email address or phone number, you may enter multiple recipients by tapping the '+' icon. Additionally, you may choose a contact from your address book by tapping the contacts icon.



4. Tap the checkout button.



5. Select a dollar amount or manually enter the amount tendered, and then tap the checkout button.

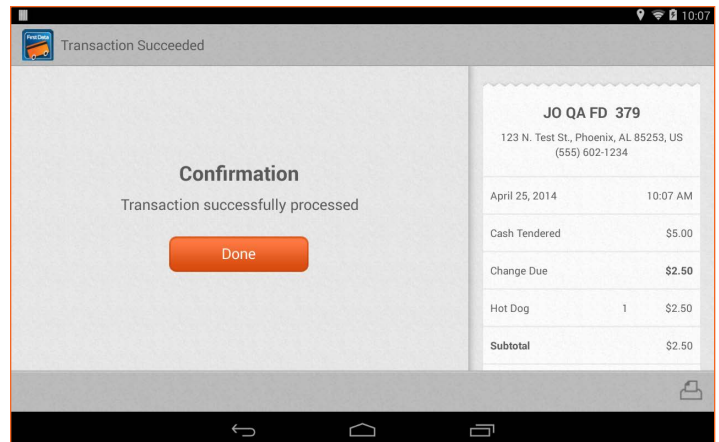




# Transactions

6. Once the transaction is approved, a digital copy of the receipt is displayed on the screen.

Tap Done to return to the sale screen.



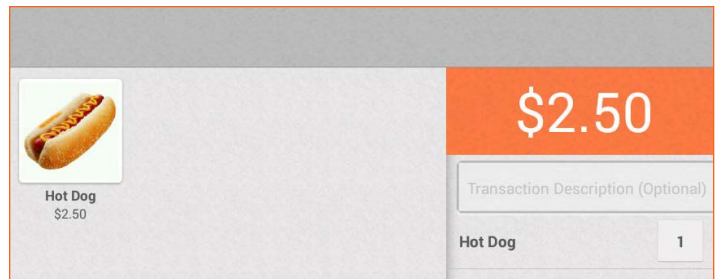


# Transactions

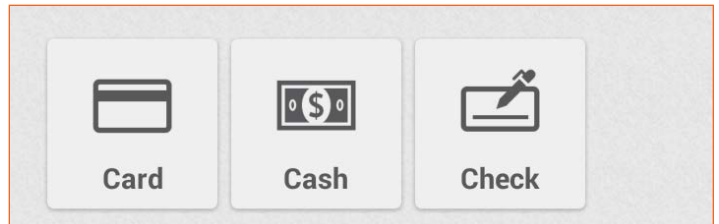
## Check Sale

Note: This transaction only records the check transaction. You will still need to deposit the check at your bank for funding.

1. Add items to the item cart, and then tap the checkout button.

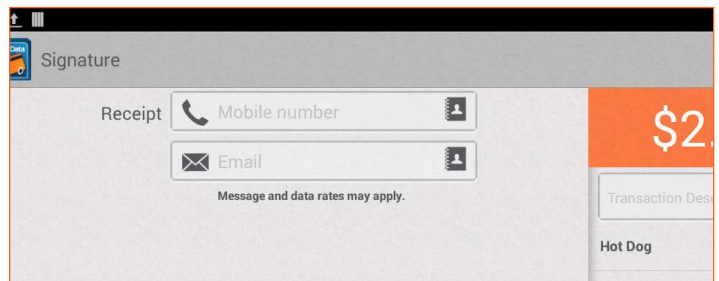


2. Tap the check icon.

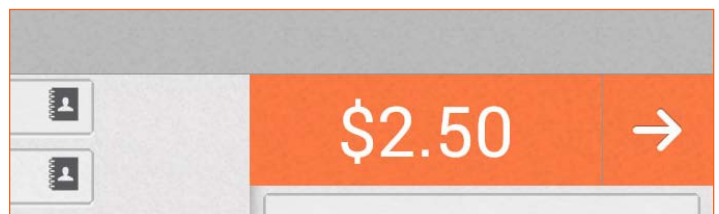


3. Enter your customer's mobile number, email address, or both in the boxes.

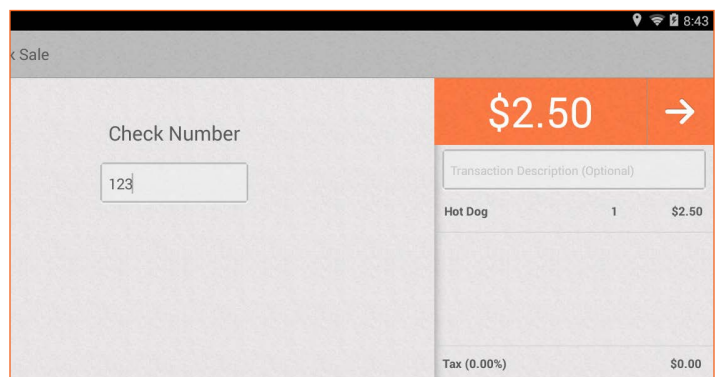
Note: After entering an email address or phone number, you may enter multiple recipients by tapping the '+' icon. Additionally, you may choose a contact from your address book by tapping the contacts icon.



4. Tap the checkout button.



5. Enter the customer's check number, and then tap the checkout button.

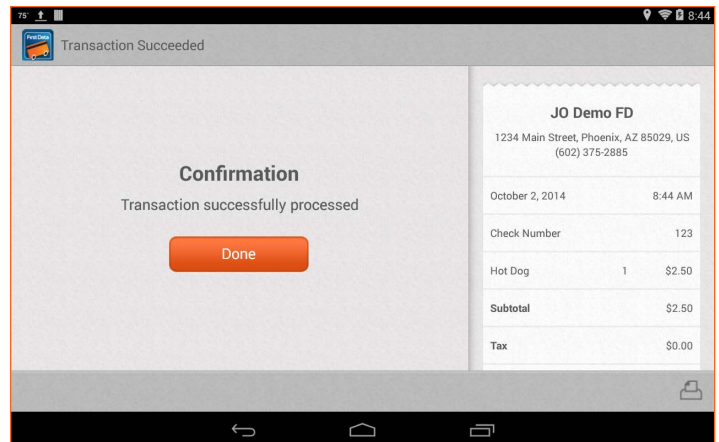




# Transactions

6. Once the transaction is approved, a digital copy of the receipt is displayed on the screen.

Tap Done to return to the sale screen.



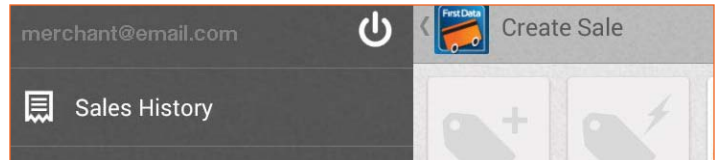


# Transactions

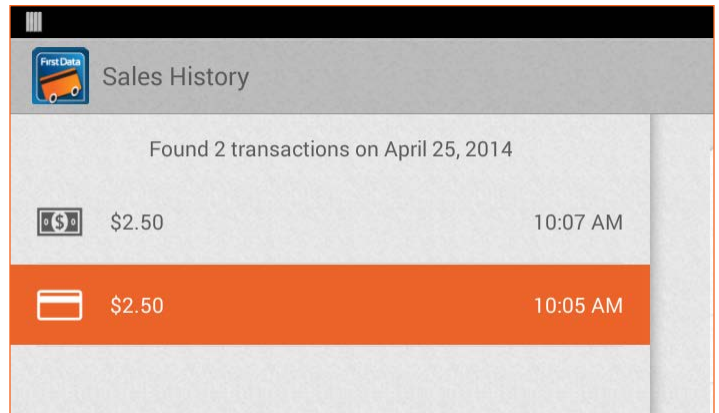
## Refund

NOTE: Refunds can only be performed by account administrators.

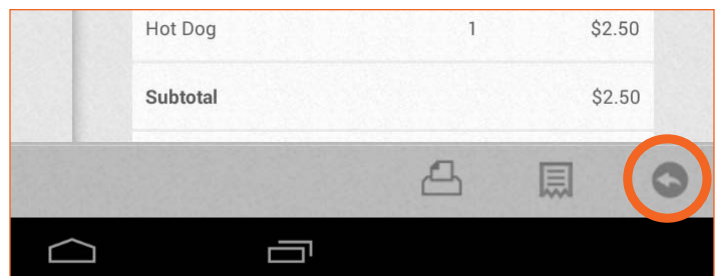
1. Tap Options, and then tap Sales History.



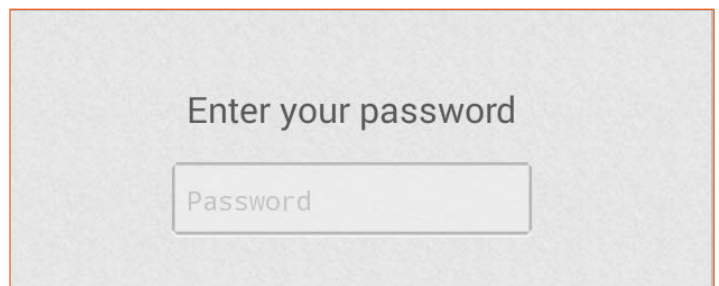
2. Select a transaction to refund.



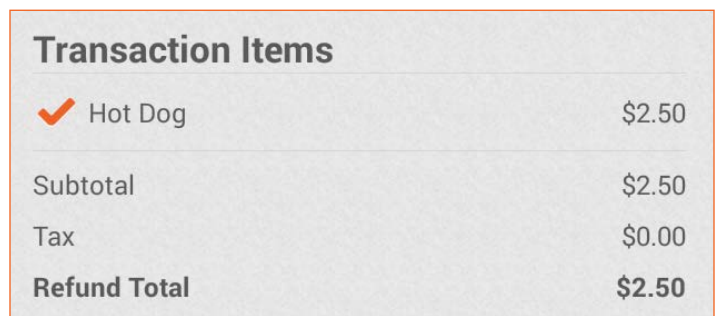
3. Tap the refund icon.



4. Enter password, and then tap the arrow.  
NOTE: This is the account Administrator password.



5. Select the transaction items for the refund, and then tap the arrow.





# Transactions

6. Select a reason for the Refund (optional), and then tap the arrow.

**Issue Refund**

Total \$2.50

Reason for Refund ▼

JO Q  
123 N. Test S  
(5  
April 25, 2014  
Invoice #  
Card Ending In  
Hot Dog  
Subtotal

7. Enter your customer's mobile number, email address, or both in the boxes, and then tap the arrow.

Note: After entering an email address or phone number, you may enter multiple recipients by tapping the '+' icon. Additionally, you may choose a contact from your address book by tapping the contacts icon.

Signature

Receipt

Mobile number

Email

Message and data rates may apply.

\$2.5

Transaction Descrip  
Hot Dog

8. Ask your customer to sign for the transaction, and then tap the arrow.

message and data rates may apply.

Hot Dog

I agree to pay the above total amount according to my card issuer agreement.

Tax (0.00%)

9. Receipt is displayed on the screen. Tap Done to return to the sale screen.

Transaction Succeeded

**Confirmation**  
Transaction successfully processed

Done

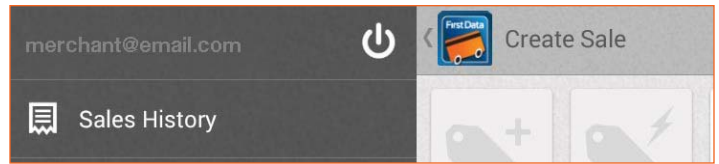
JO QA FD 379  
123 N. Test St., Phoenix, AL 85253, US  
(555) 602-1234  
April 25, 2014 10:05 AM  
Visa 1111  
Hot Dog 1 \$2.50  
Subtotal \$2.50  
Tax \$0.00



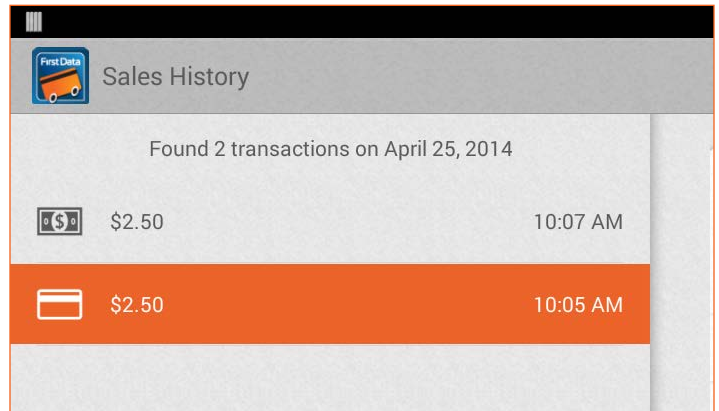
# Backup and Restore Inventory

## Resend Receipt

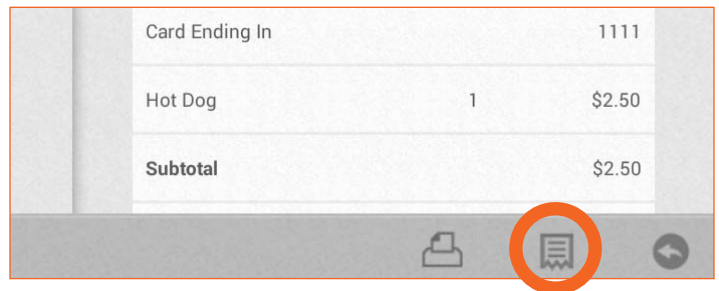
1. Tap Options, and then tap Sales History.



2. Select a transaction to refund.

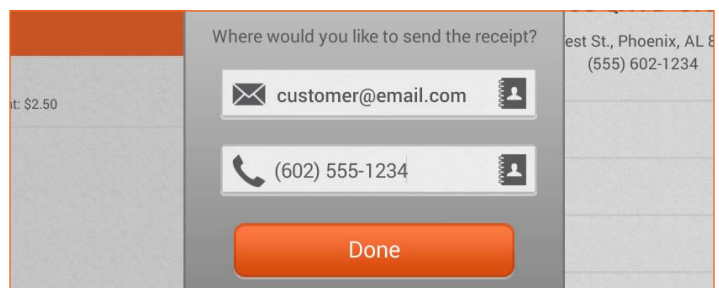


3. Tap the receipt icon.



4. Enter your customer's mobile number, email address, or both in the boxes, and then tap Done.

Note: You may also choose a contact from your address book by tapping the contacts icon.





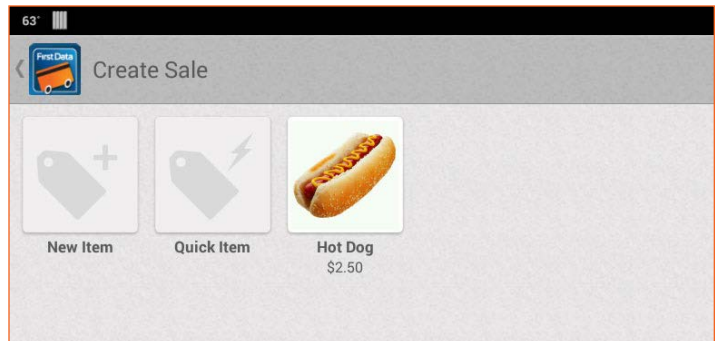
# Inventory Maintenance

Note: Only account administrators can perform inventory maintenance.

## Add New Items

Inventory items allow you to quickly choose items you'd like to sell during a transaction. When adding new items, you can assign an item name, photo, price, tax option, description and a UPC bar code. To add a new inventory item:

1. Tap the New Item icon in the Item window.
2. Enter the item details in the boxes, and then tap Continue.

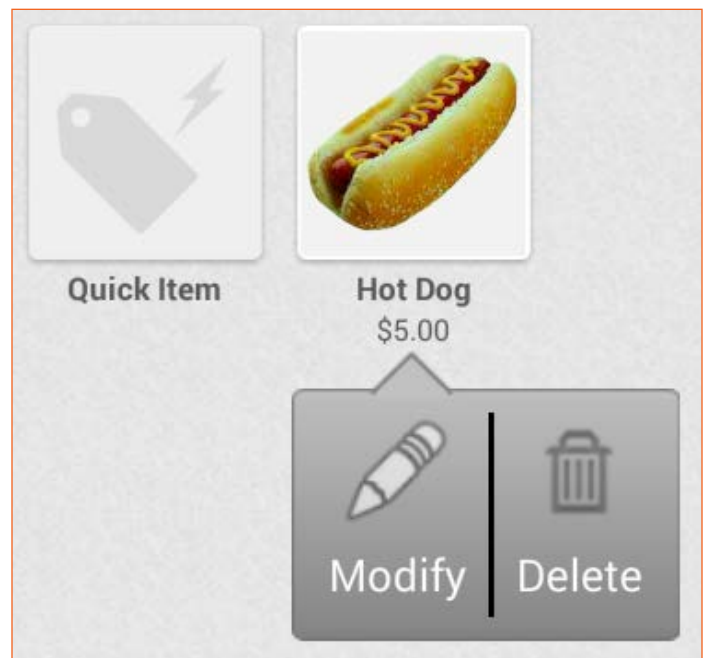
A screenshot of a form for adding a new item. It includes a camera icon for a photo, a "Name" text field, a price field set to "\$0.00", a "Taxable?" checkbox which is checked, a "Description (Optional)" text field, and a "UPC (optional)" text field. At the bottom is an orange "Continue" button.

Add New Item

## Modify or Delete Items

You can edit items or remove items that are no longer needed:

- Long-press the item in the item window, and then tap Modify to change an item or tap Delete to remove the item.



Modify or Delete Items



# Backup and Restore Inventory

## Backup or Restore Inventory Items

Note: Backup and Restore are administrator functions and cannot be performed by sub-users.

Once you have added items to your inventory, you can backup or restore items to/from a SD (Secure Digital) memory card. This feature makes it easy for you to make all inventory items available for sale on multiple devices.

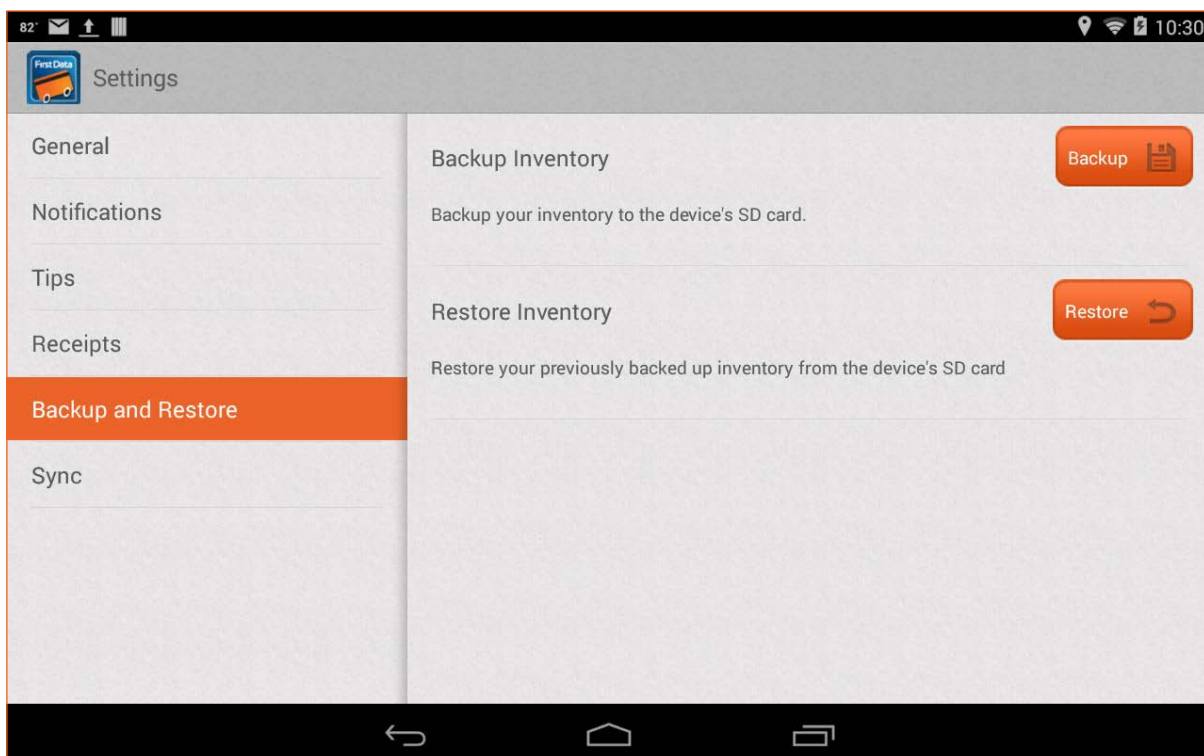
The inventory is automatically synced to the cloud when the administrator creates, deletes or modifies inventory items. Their associated users (sub-users) will receive these changes to their devices in real time.

### Backup Items:

1. Tap Options.
1. Tap Settings.
2. Tap Backup and Restore.
3. Tap Backup to backup your inventory to the device's SD card.

### Restore Items:

1. Tap Options.
1. Tap Settings.
2. Tap Backup and Restore.
3. Tap Backup to backup your inventory to the device's SD card.





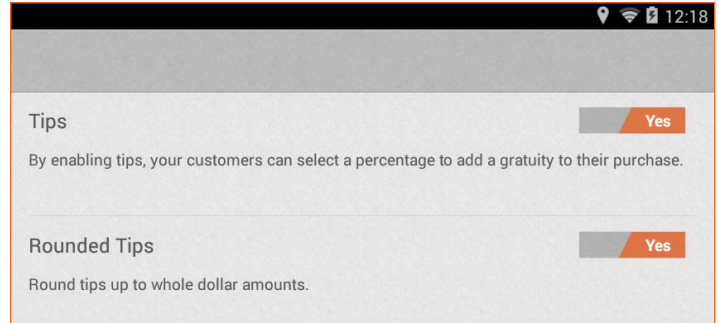
# Settings

There are many settings that you can configure within First Data Mobile Pay™. All settings are accessed by tapping the Options menu, and then tapping Settings.

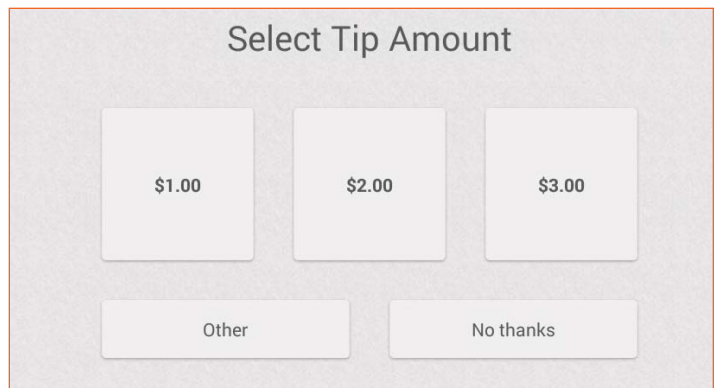
## Tips

You may enable tips (gratuities) that allow your customer to add a gratuity to your sales transactions. To enable tips:

1. Tap Options.
2. Tap Settings.
3. Tap Tips.
4. Turn Collect Tips on or off using the slider. When you enable tipping, your customer will be able to add a gratuity when they sign for their payment.
5. Additionally, you may enable Rounded Tips to round tips up to whole dollar amounts.



Tips slider



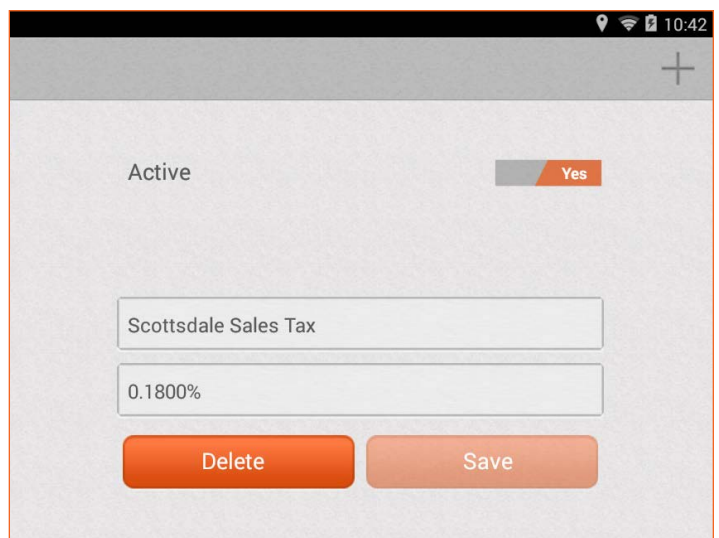
Tip Prompt

## Tax

You may enable adding a sales tax percentage to your transactions:

1. Tap Options.
2. Tap Tax.
3. Tap the '+' icon.
4. Type a name for tax rate, enter a percentage, and then tap Save.

Note: Multiple tax rates can be configured and turned on. All active taxes will be applied to items marked as taxable at checkout. Use the Active slider to turn them on or off.



Tax slider & Tax Percentage

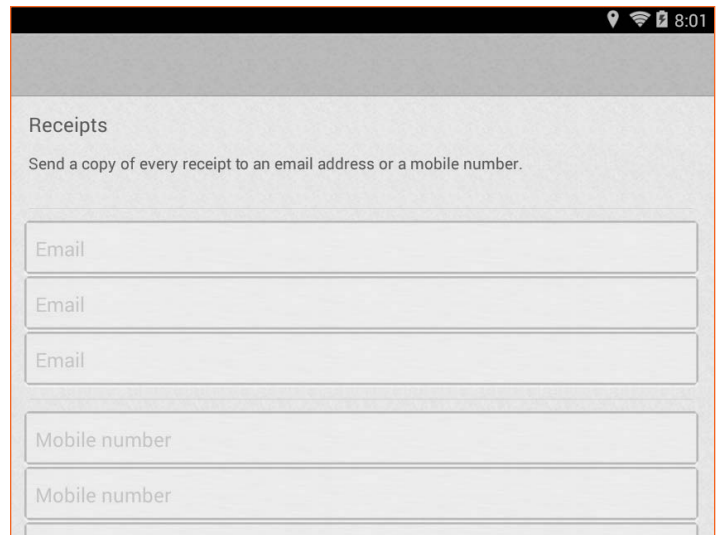


# Settings

## Receipts

Use the automatic receipt option if you would like to receive copies of transaction receipts via email or SMS message. To enable receipts:

1. Tap Options.
2. Tap Settings.
3. Tap Receipts.
4. Turn Receipts on using the slider and add up to 3 mobile numbers and 3 email addresses.

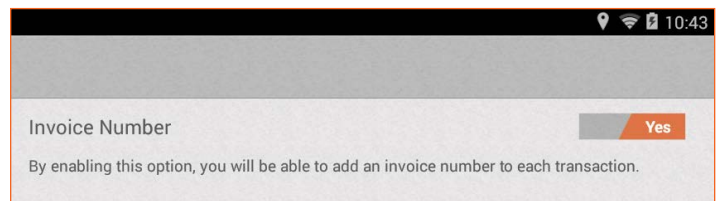


Receipts slider

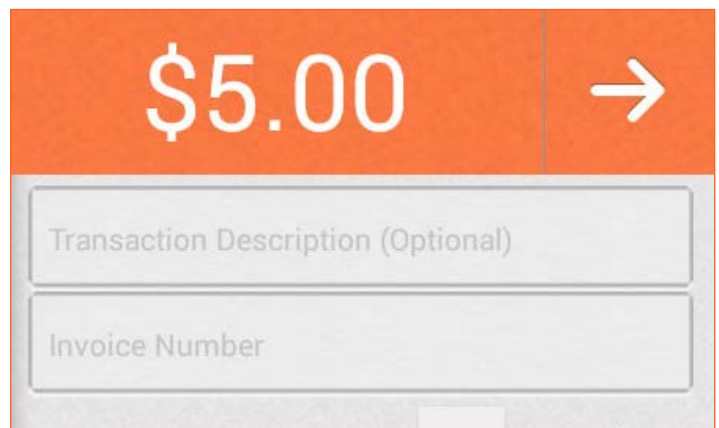
## Invoice Numbers

If you enable invoice numbers, you will have the option to enter an invoice number for each transaction that you run. To turn invoice numbers on:

1. Tap Options.
2. Tap Settings.
3. Tap General.
4. Turn invoice numbers on or off using the slider.



Invoice Number slider



Invoice Number in transaction

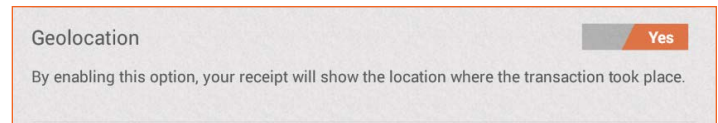


# Settings

## Geolocation

Geolocation allows First Data Mobile Pay™ to access your location information which will display a map on all transaction receipts.

1. Tap Options.
2. Tap Settings.
3. Tap General.
4. Turn Geolocation on or off using the slider.

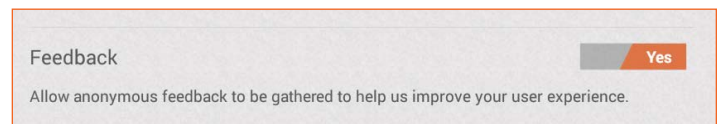


Geolocation slider

## Feedback

Allows anonymous analytics to be gathered to help us improve your user experience.

1. Tap Options.
2. Tap Settings.
3. Tap General.
4. Turn Feedback on or off using the slider.

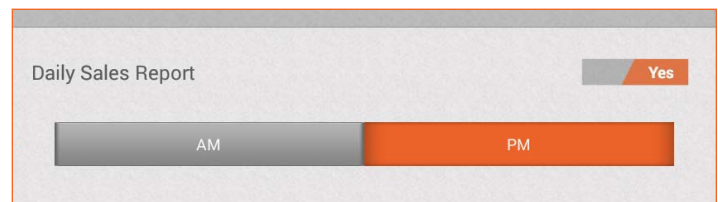


Analytics slider

## Notifications

If you would like a Daily Sales Report notification sent to your device, enable notifications:

1. Tap Options.
2. Tap Notifications.
3. Turn Daily Sales Report on or off using the slider and select AM or PM for delivery time.



Notifications slider



# Settings

## Sync Settings

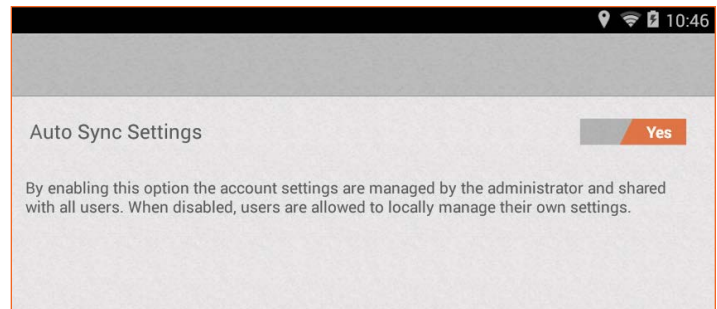
By enabling this option the account settings are managed by the administrator and shared with all users. When disabled, users are allowed to locally manage their own settings.

1. Tap Options.
2. Tap Settings.
3. Tap Sync.
4. Turn Auto Sync on or off using the slider.

Where auto sync cloud settings are turned on, a sub-user will not be able to make modifications to these settings as they are controlled by the administrator. Where auto sync settings are not turned on, the associated account sub-users can modify these settings independently, however these settings will be local to their device and will not be shared with other users associated with their account.

Auto sync settings apply to:

- Tax Settings
- Tip Settings
- Receipt Settings
- Invoice Numbers
- Geo-location



Backup/Restore prompt



# Reports

## Sales History

The Sales History allows you to search and review your transaction history. This report allows you to search by Date, Card Details (last 4 credit card numbers) and transaction amount. To run a sales history report:

1. Tap Options.
2. Tap Sales History.
3. Select a transaction from the list to view the transaction details.

**Sales History**

Found 2 transactions on March 25, 2014

	\$3.25	7:41 AM
	\$5.00	7:40 AM

**JO QA FD 379**  
123 N. Test St., Phoenix, AL 85253, US  
(555) 602-1234

March 25, 2014	7:40 AM	
Invoice #	934538	
Card Ending In	1111	
Hot Dog	1	\$5.00
<b>Subtotal</b>		<b>\$5.00</b>

*Sales History Transaction Detail*

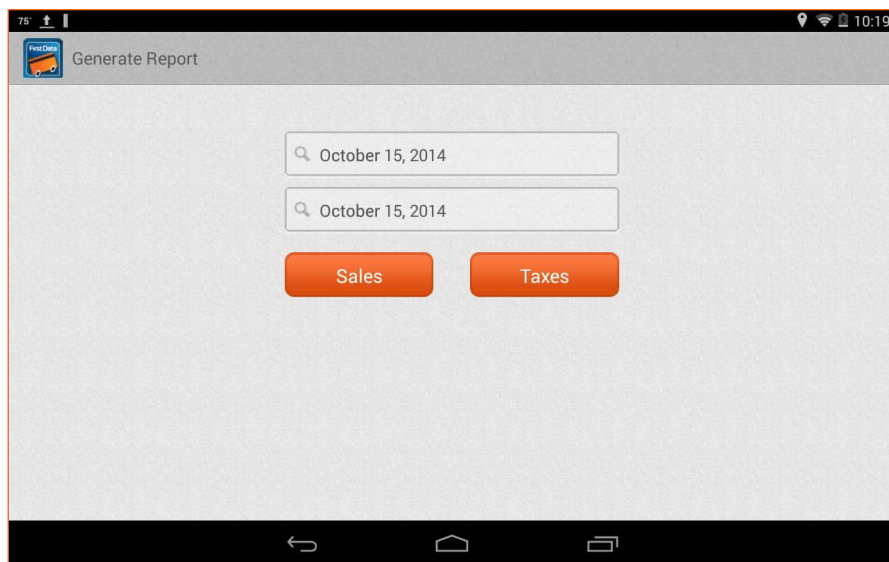


# Reports

## Total Sales Report

The total sales report summarizes credit, cash, tax and tip totals. This report can be emailed to a recipient of your choice. To run a total sales report:

1. Tap Options.
2. Tap Reports.
3. Select a start date and an end date, and then tap Sales.
4. Tap an individual batch to see the report details.



Sales Report



Report Detail



Tap the email icon to email the detail report to a recipient of your choosing.



# Reports

## Sales Tax Report

The sales tax report allows you to view tax totals by date range that are categorized by your configured tax rates.

1. Tap Options.
2. Tap Reports.
3. Select a start date and an end date, and then tap Taxes.

Generate Report

October 15, 2014

October 15, 2014

Sales Taxes

*Taxes Report*

Tax Report

Scottsdale Sales Tax	\$0.45	10/14 - 10/15
Total	\$0.45	

*Report Detail*



# Troubleshooting and Support

## Troubleshooting

Issue	Suggestion
Unable to log in to the application	<ul style="list-style-type: none"><li>• Ensure that you are connected to a network and that your device is not in airplane mode.</li></ul>
Forgot password	<ul style="list-style-type: none"><li>• Reset your password by tapping <i>Reset Password</i> on the Login Screen.</li></ul>
Password does not work	<ul style="list-style-type: none"><li>• Ensure you are spelling it correctly.</li><li>• Ensure you enter the case correctly.</li></ul>
Card reader is not working properly	<ul style="list-style-type: none"><li>• Ensure the reader's audio jack is completely inserted into your device.</li><li>• Disconnect and reconnect the reader.</li><li>• Ensure headset volume is turned up to the highest setting</li><li>• Power off your device and restart it.</li></ul>
Application closes unexpectedly	<ul style="list-style-type: none"><li>• Close all other open applications on your device.</li><li>• Ensure you are connected to a network.</li><li>• Ensure your device is not in airplane mode.</li><li>• Power off your device and restart it.</li></ul>
I cannot process transactions	<ul style="list-style-type: none"><li>• Ensure you are connected to a network.</li><li>• Ensure your device is not in airplane mode.</li><li>• Close all other open applications on your device.</li><li>• Disconnect and reconnect the reader.</li><li>• Power off your device and restart it.</li></ul>

## Technical Support

Our Customer Contact Representatives are available 24 hours a day, 7 days a week to help merchants with technical support issues they may have with First Data Mobile Pay™.

866.277.4820