First Data

Mobile Pay™

for iPad®

*iOS Version 6.0 or higher required

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Introduction

Overview

First Data Mobile Pay™ Solution turns an iOS Tablet 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

Admin Functionality

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Getting Started

Download First Data Mobile Pay™

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

Note: An iTunes® account is required to download apps from the Apple App Store. Please click here for more information on setting up an iTunes account.

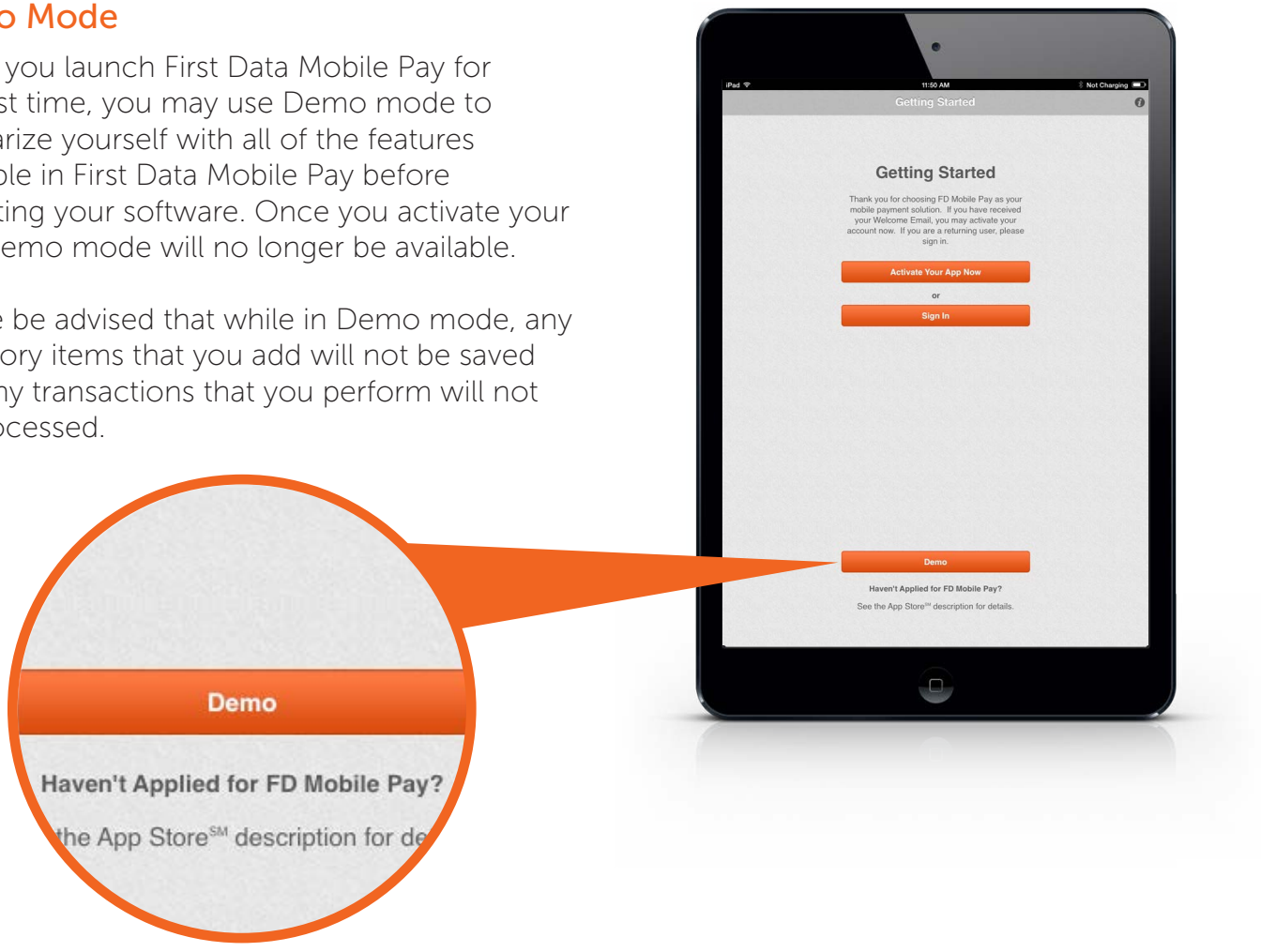
Download on the App Store

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

Demo Mode

When you launch First Data Mobile Pay 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.



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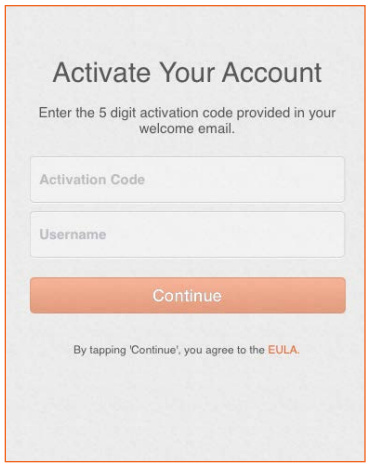
Getting Started

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.

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



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

Security questions

If you ever need to reset your First Data Mobile Pay 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

Choose a password

Next, you'll be prompted to create a password for your First Data Mobile Pay 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

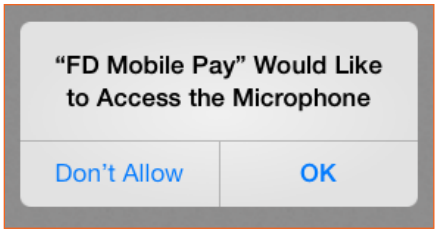
Card reader

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

IMPORTANT: iOS7 Card Reader Access Update

In order to swipe cards using the card reader on iOS 7.0+, you need to allow the application to access the microphone. After updating to iOS 7.0+ on your iPhone® or iPad®, do the following:

- Log in to the app. Plug in the card reader and you will be prompted to allow the application to access the microphone. Select OK.



If you skip this prompt you can also access your microphone settings as follows:

- Go to Settings> Privacy> Microphone. Turn FD Mobile Pay to green.

If you are not using iOS 7.0+, no action is needed as you will continue to be able to swipe cards with the application. Please keep these instructions in mind if you do upgrade to iOS 7.0+.

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

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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.

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.

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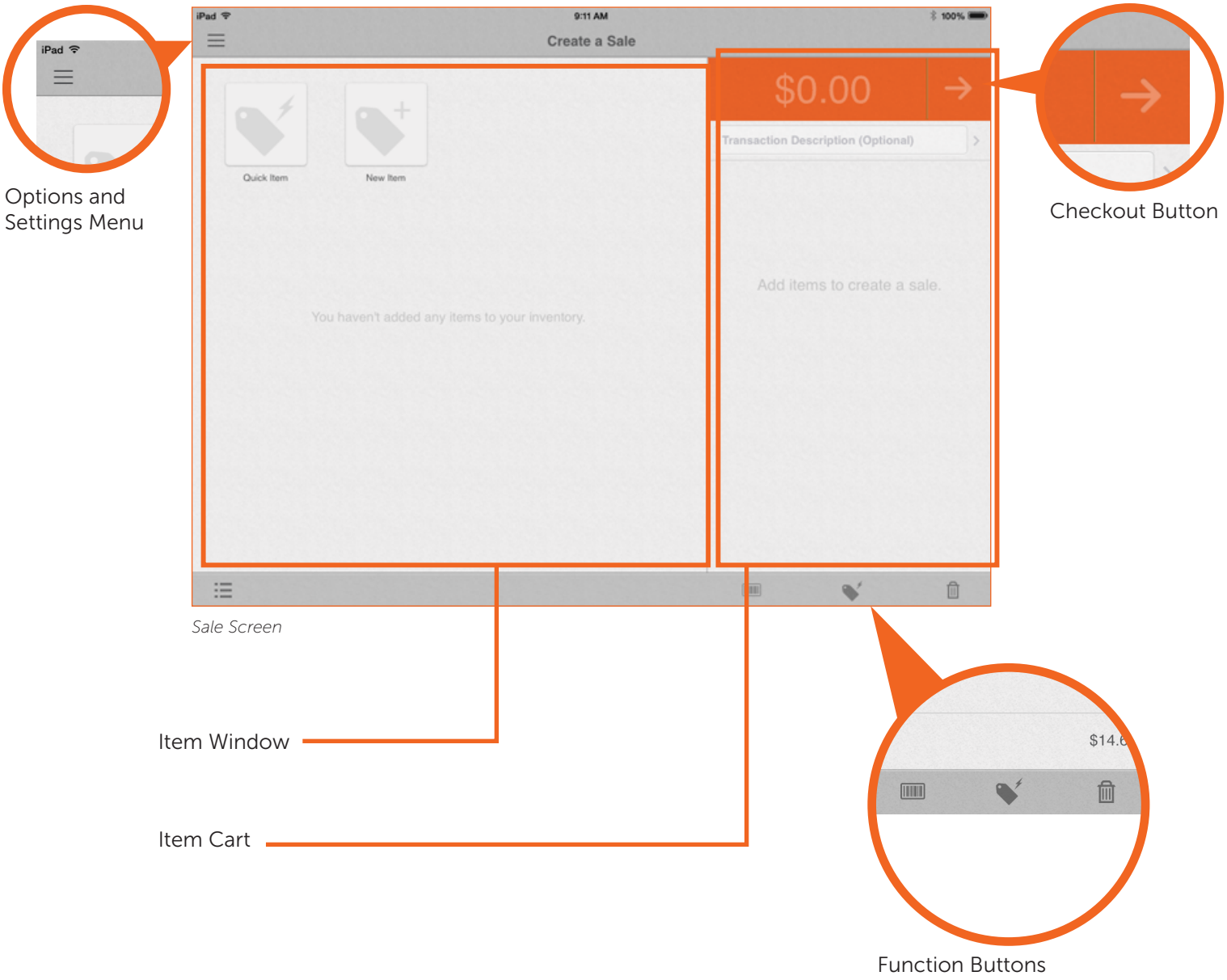
Sale Screen Overview

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

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



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Item Window

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

Existing Items:

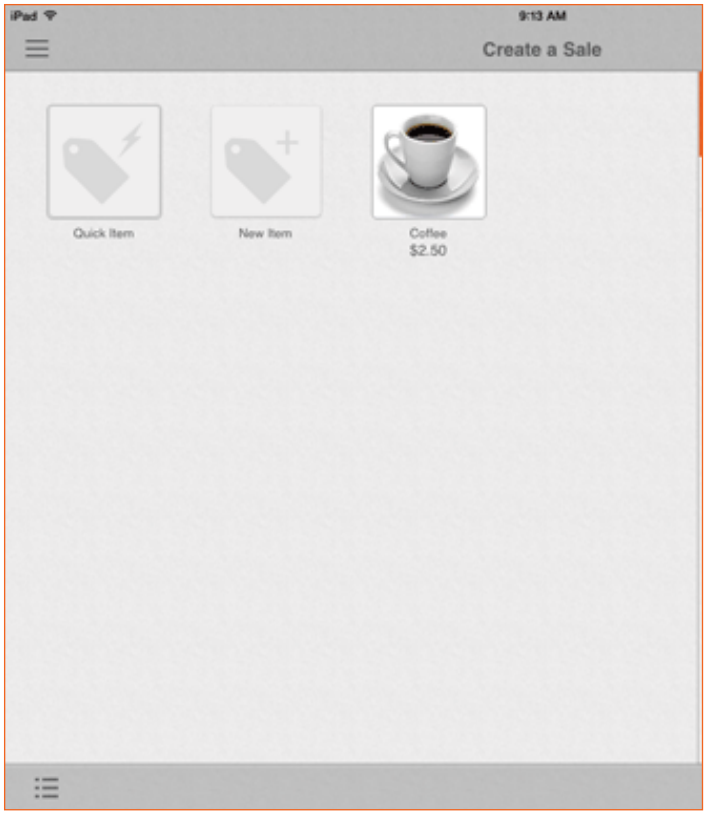
To add an existing item to the cart, simply tap the item on the screen.

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 Item:

Please see *Add New Items* for more information.



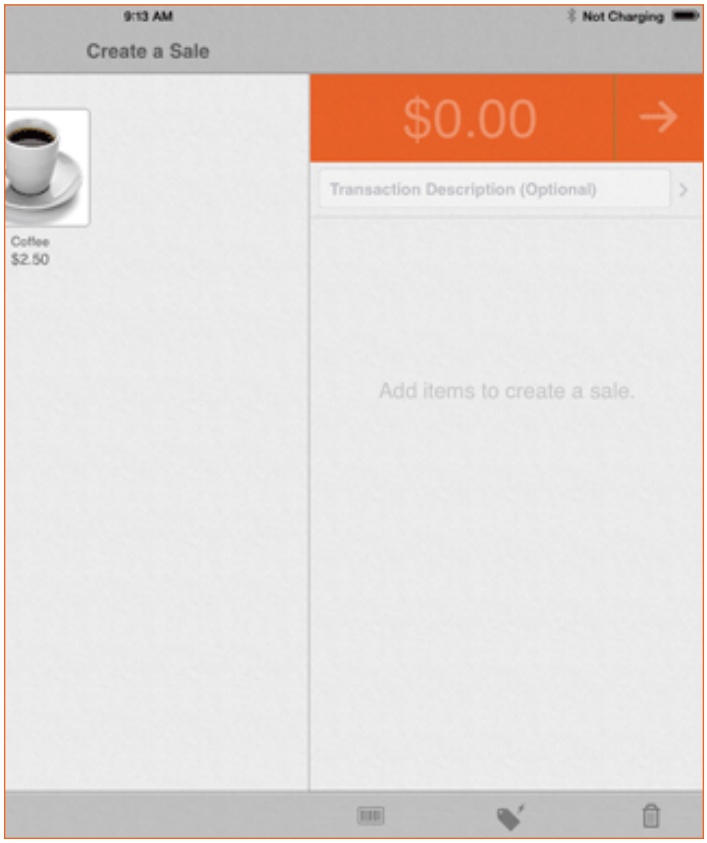
Item Window

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 item 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* for more information.



Item Cart

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Function Buttons

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.

Options and Settings Menu

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

Please see *Reports* for more information on reports.

Please see *Inventory Maintenance* for more information on managing your inventory.

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

Help and Support

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

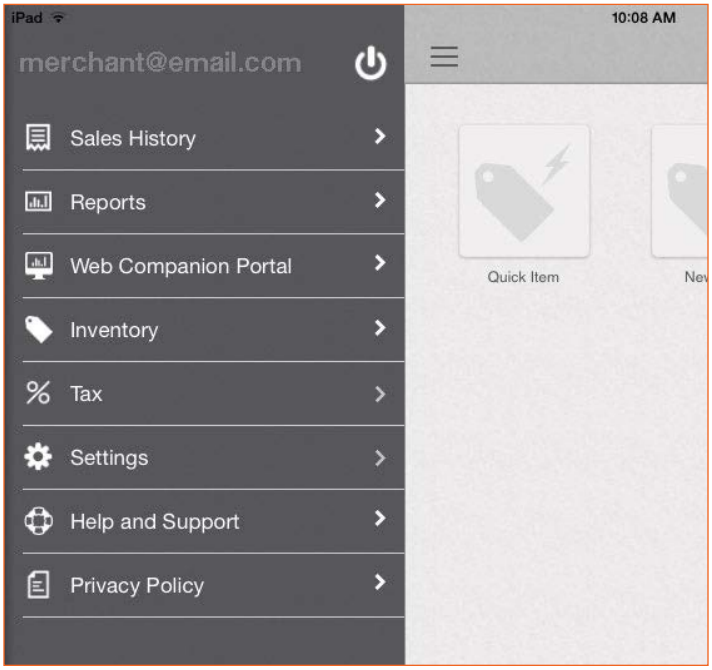
Tap *Web Companion Portal* to access the First Data Mobile Pay web portal.

To view our privacy policy, tap Privacy Policy.

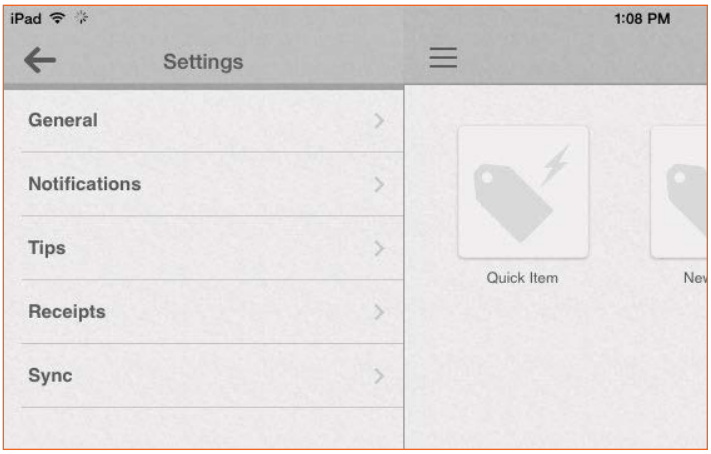
Checkout Button

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.



Options Menu



Settings Menu

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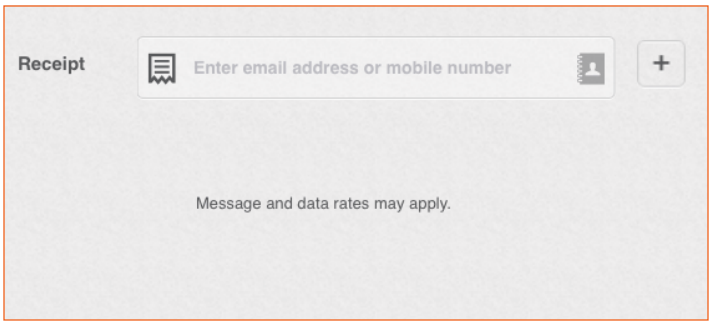
Email Receipts

After completing transactions, you have the ability to add a description to the transaction and send email receipts to your customers.

Tap the Email box to send an email receipt.

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

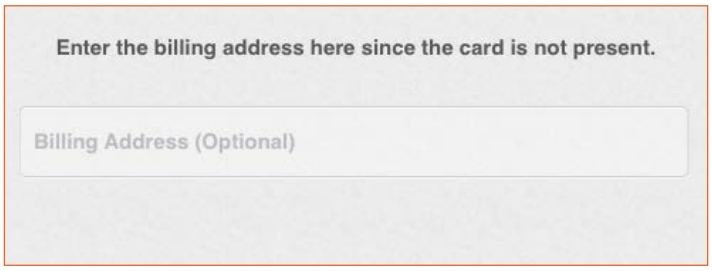


Special Prompting

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

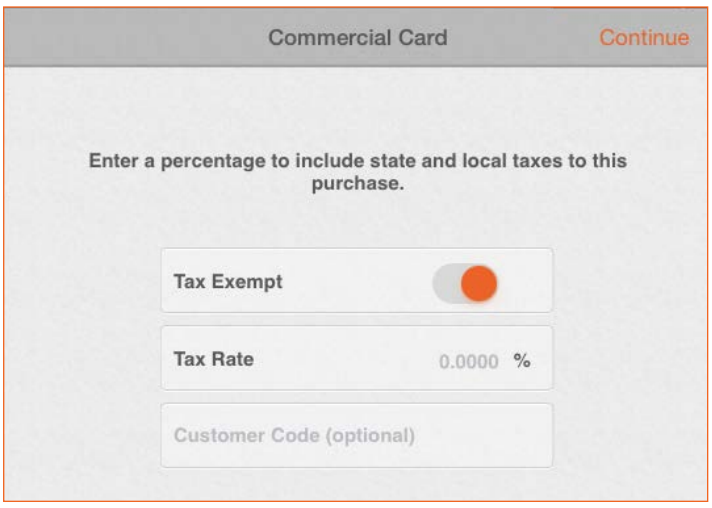
AVS (Address Verification):

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



Commercial Cards:

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



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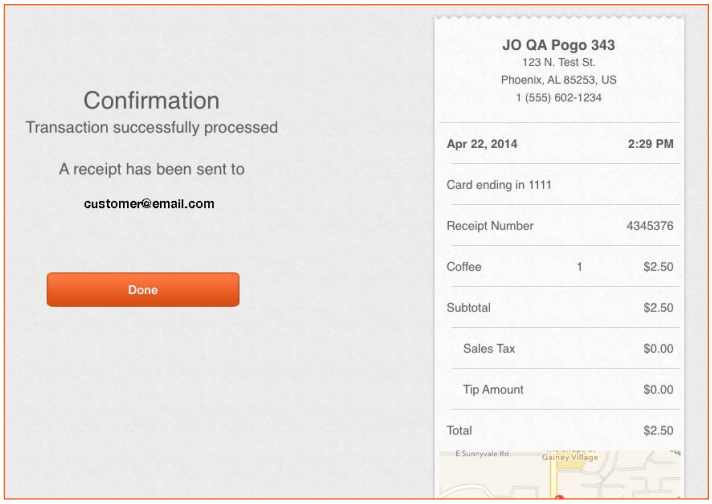
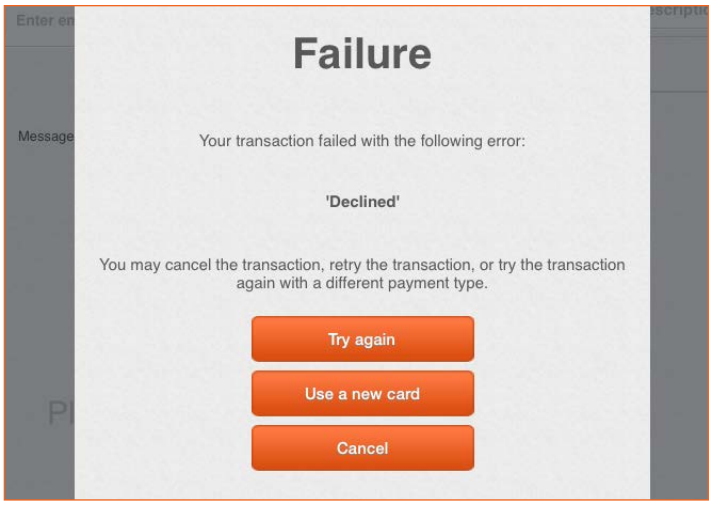
Approved Transaction

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



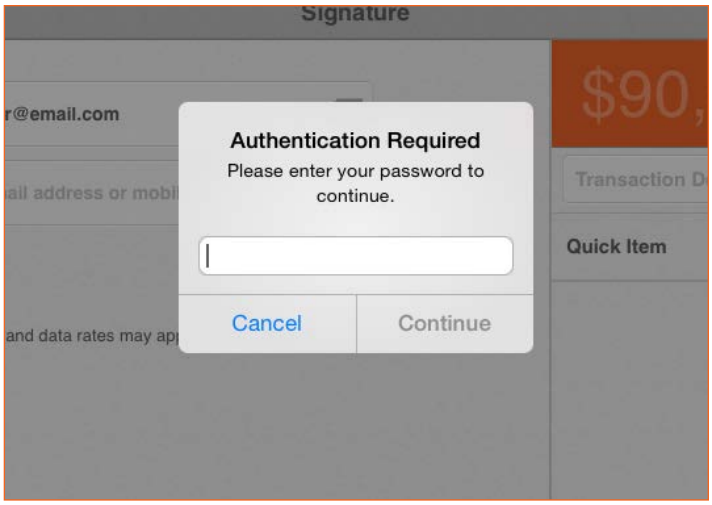
Declined Transaction

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 logged in" option when logging into the app.



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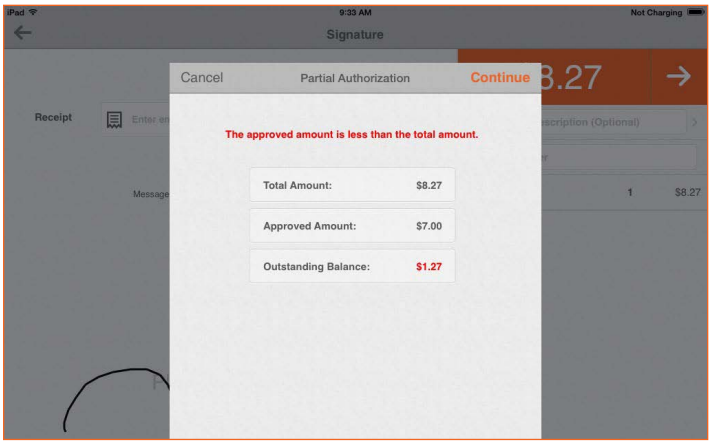
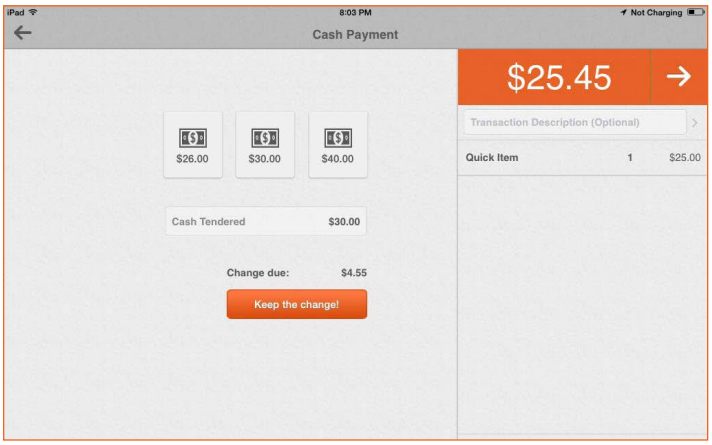
Partial Authorization

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 before finalizing the transaction.



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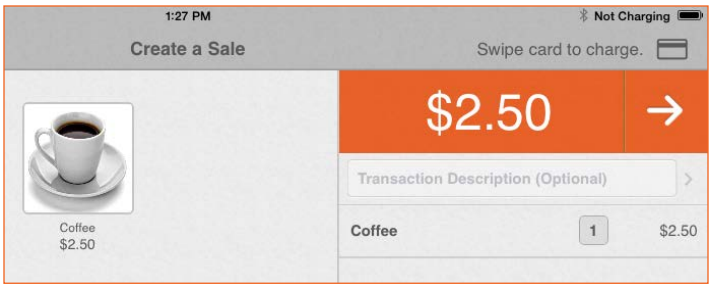
Transactions

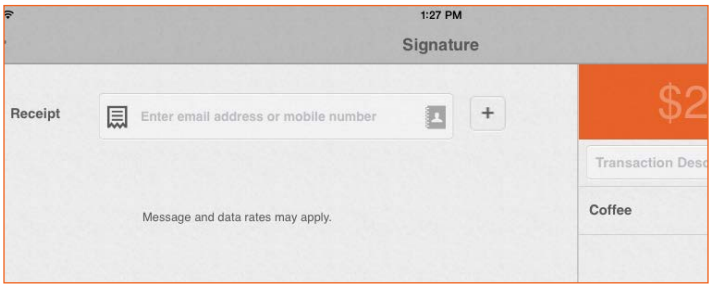
Credit Card Sale

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

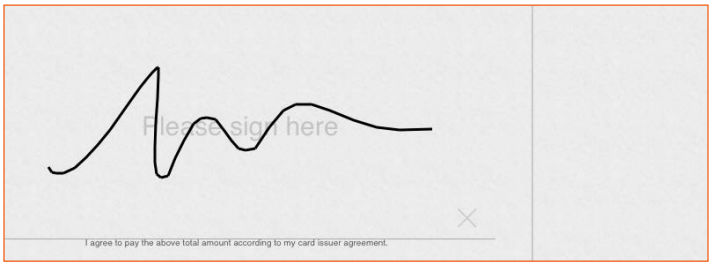


2. Enter your customer's email address in the Receipt box, and then tap Send.

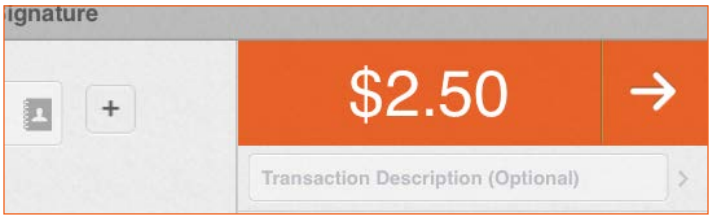
   Note: After entering an email address or phone number, you may enter multiple recipients by tapping the '+' icon. Additionally, you may choose a contact from your address book by tapping the contacts icon.



3. Ask your customer to sign for the transaction.

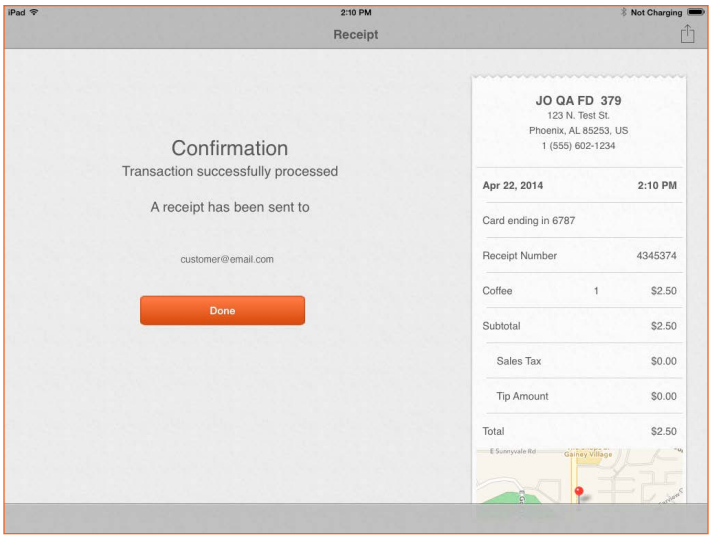


4. Tap the checkout button.



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.



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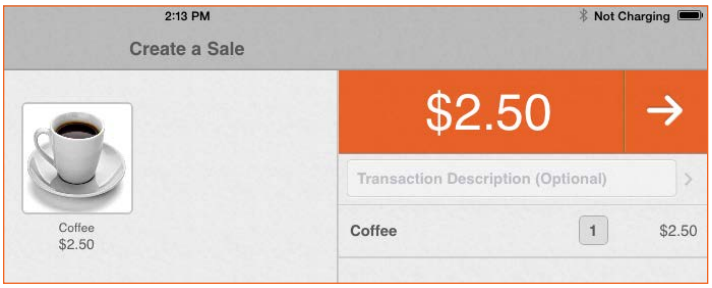
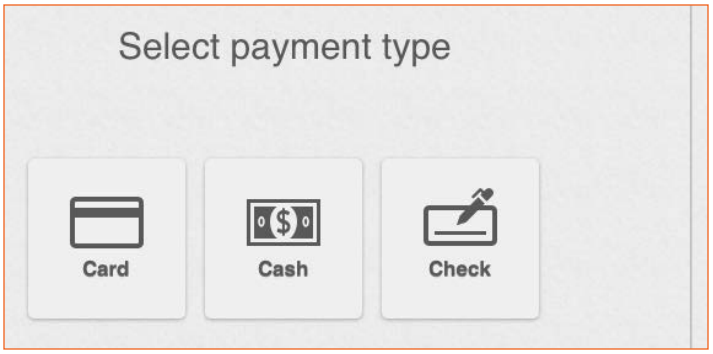
Manual Credit Card Sale

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:

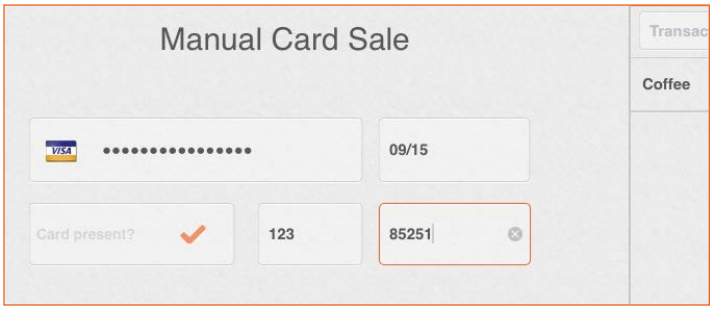
1. Add items to the item cart, and then tap the checkout button.



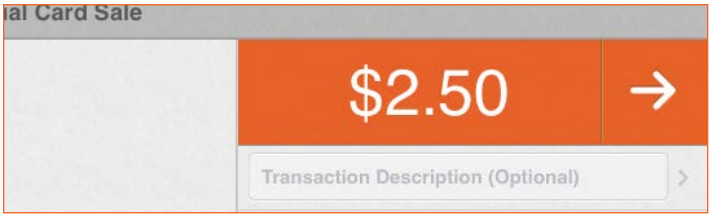
2. Tap the card icon.



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.



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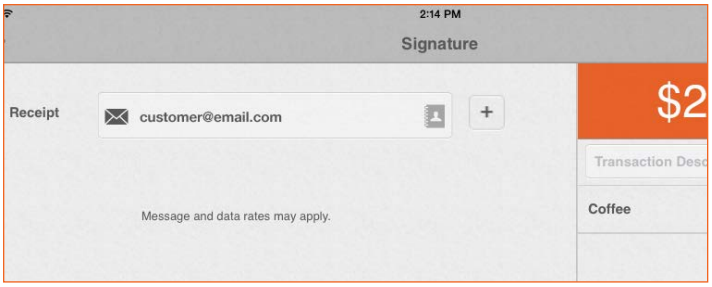
Transactions

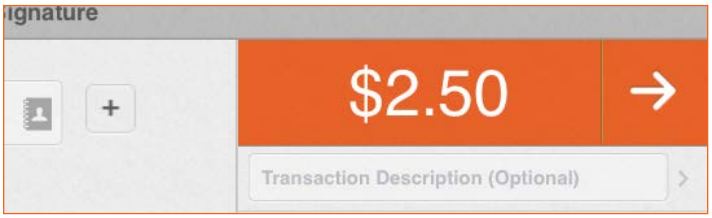
5. Enter your customer's email address in the Receipt box, and then tap Send.

   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.



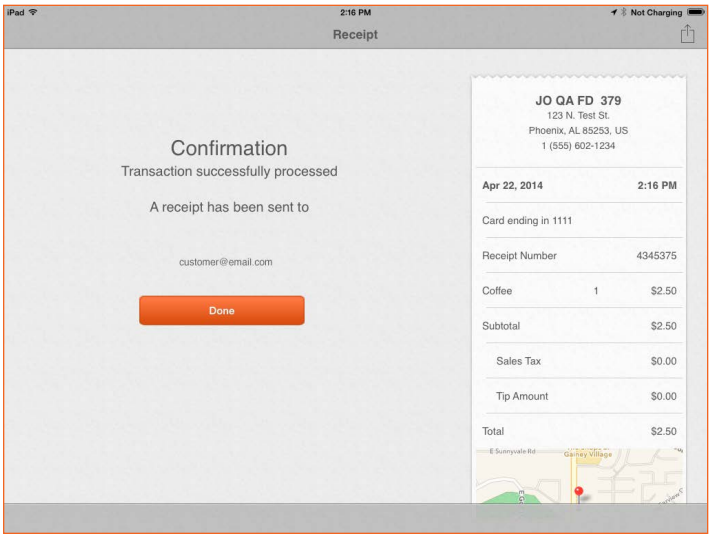
6. Ask your customer to sign for the transaction.

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.



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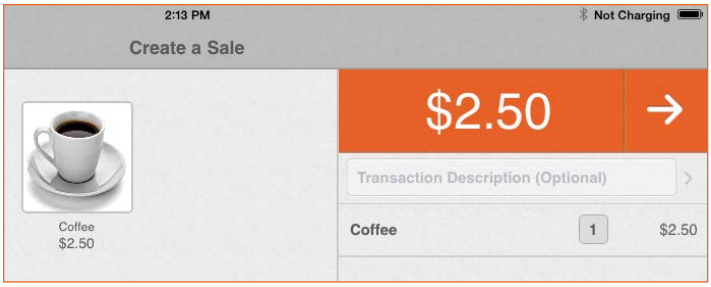
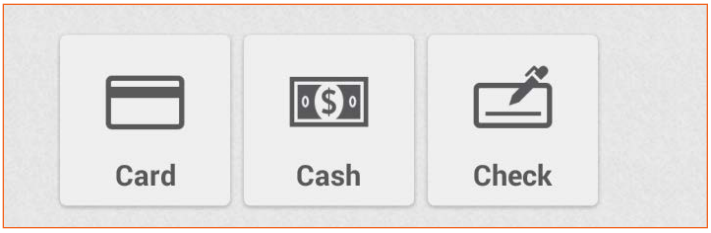
Cash Sale

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

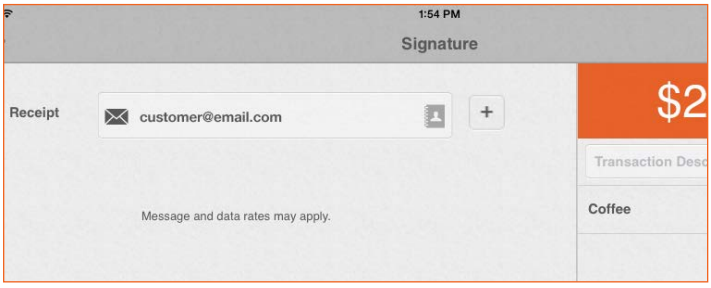


2. Tap the cash icon.

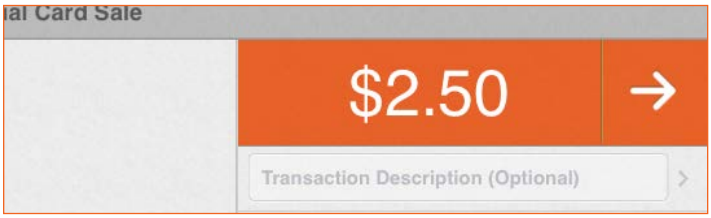


3. Enter your customer's email address in the Receipt box.

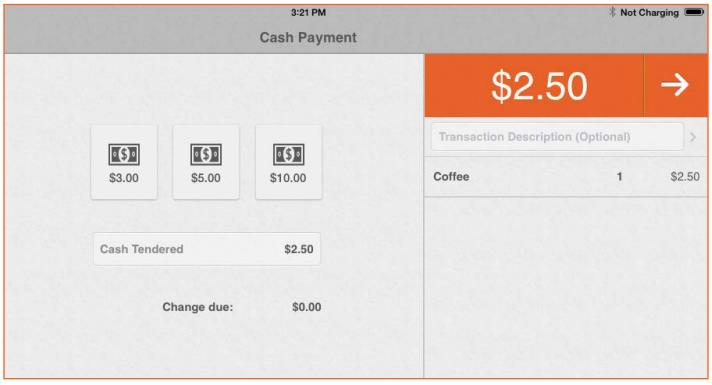
   Note: After entering an email address or phone number, you may enter multiple recipients by tapping the '+' icon. Additionally, you may choose a contact from your address book by tapping the contacts icon.



4. Tap the checkout button.



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



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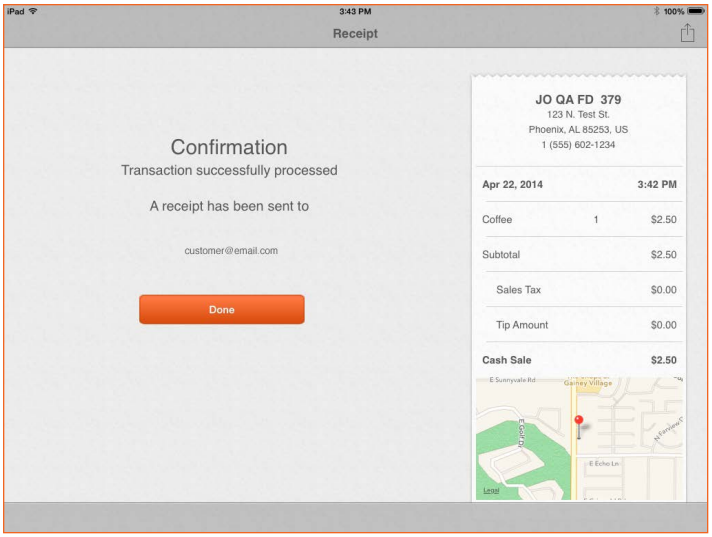
Transactions

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.



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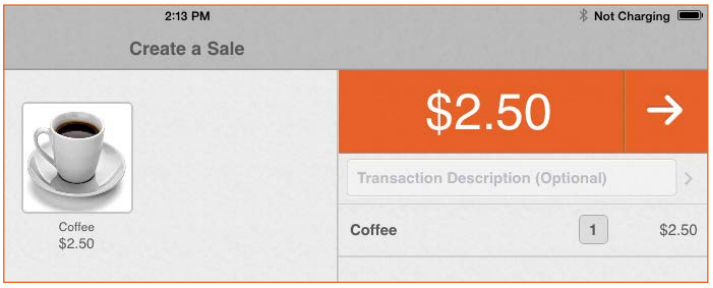
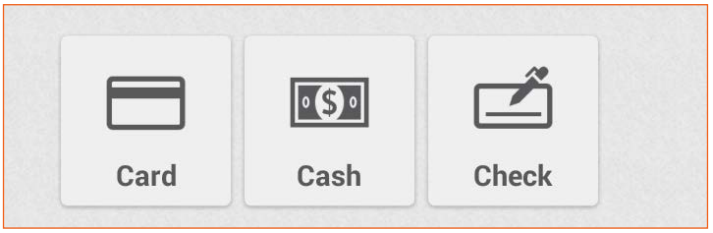
Check Sale

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.

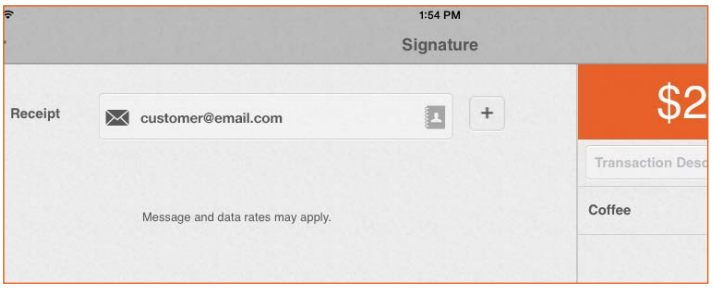


2. Tap the check icon.

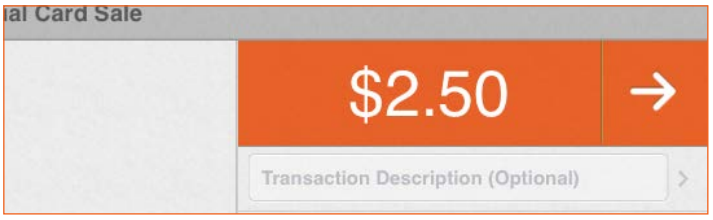


3. Enter your customer's mobile number or email address in the box.

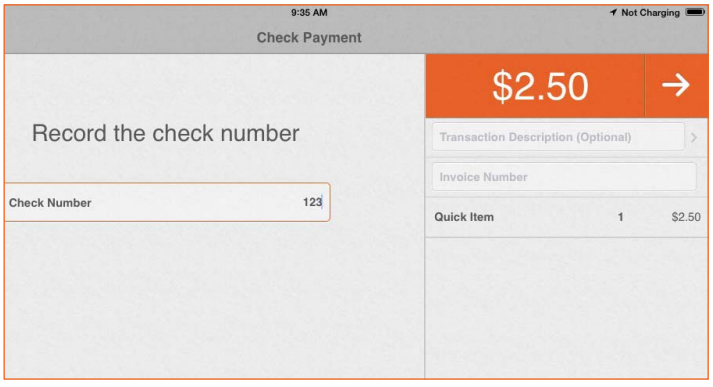
   Note: After entering an email address or phone number, you may enter multiple recipients by tapping the '+' icon. Additionally, you may choose a contact from your address book by tapping the contacts icon.



4. Tap the checkout button.



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



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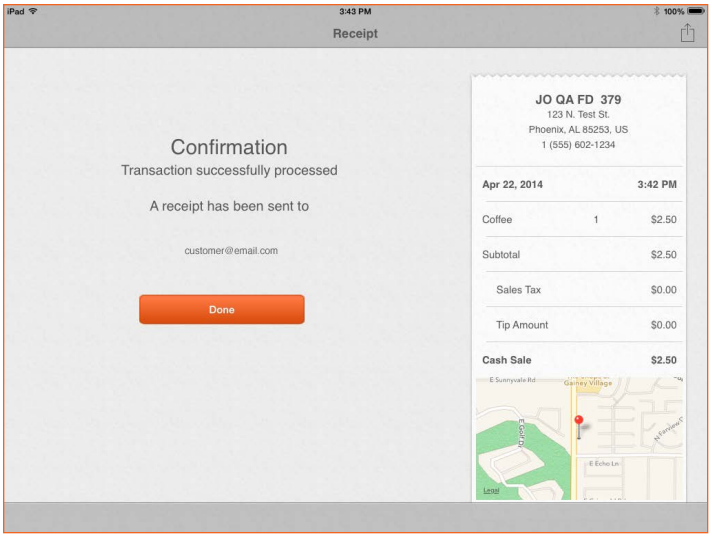
Transactions

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.



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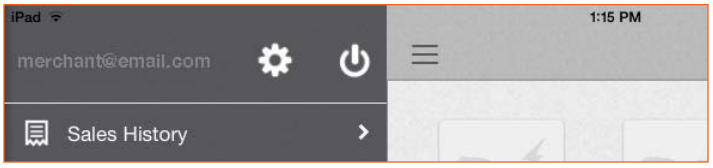
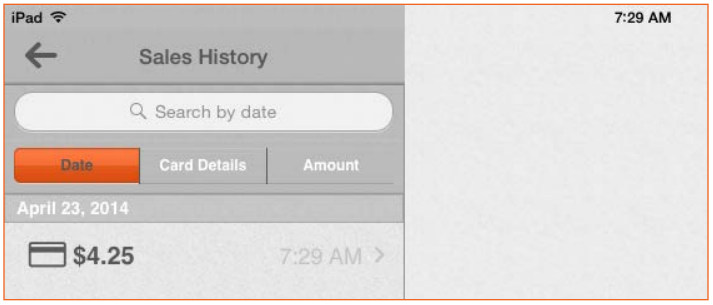
Refund

NOTE: Full and partial refunds can only be performed by account administrators.

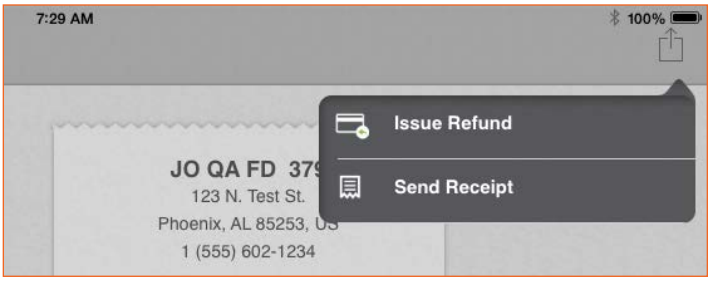
1. Tap Options, and then tap Sales History.



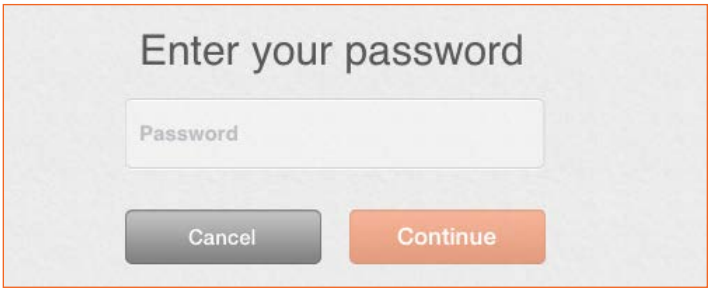
2. Select a transaction to refund.



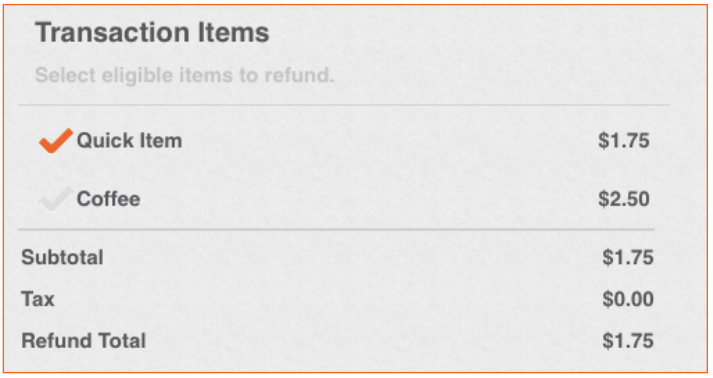
3. Tap the share icon, and then tap Issue Refund.



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



5. Select the transaction items for the refund.



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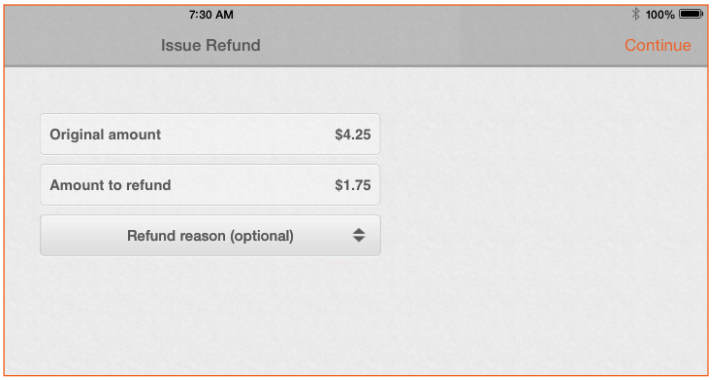
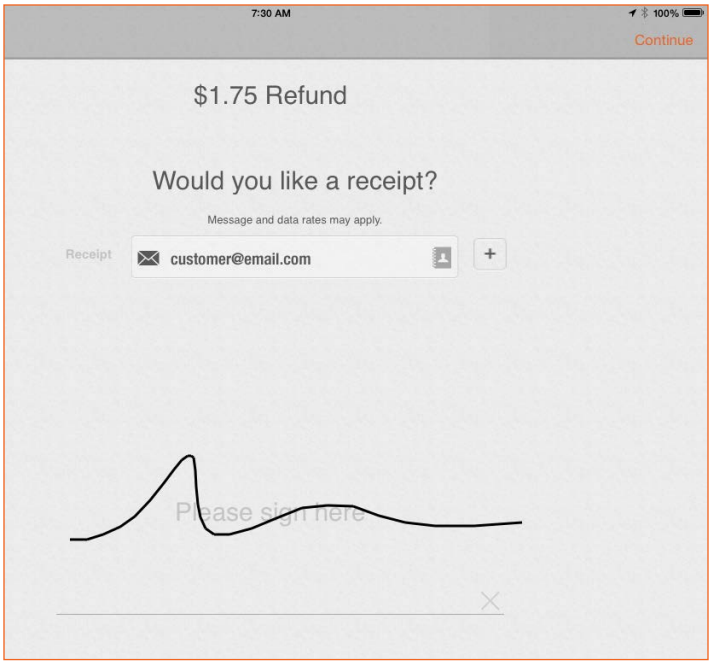
6. Select a reason for the Refund, and then tap Continue.

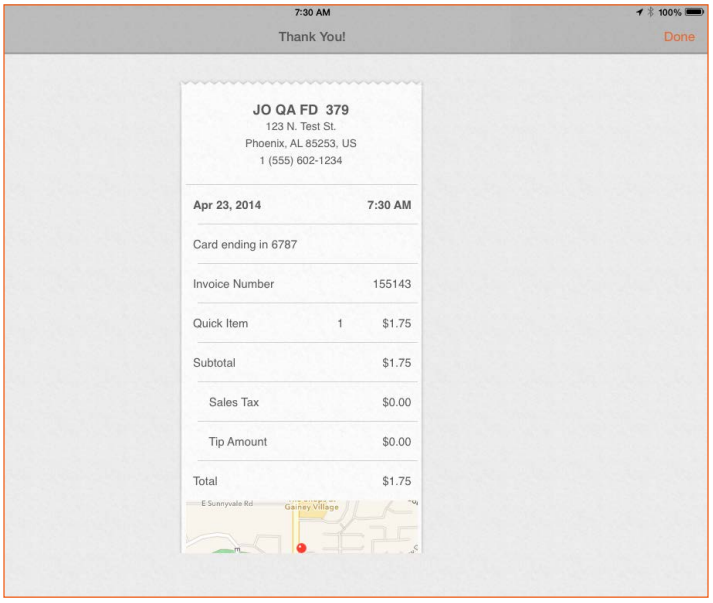


7. Enter your customer's email address in the Receipt box, and then tap Send.

   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.



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



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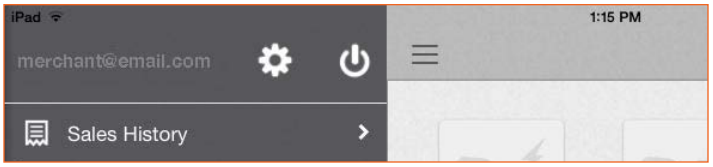
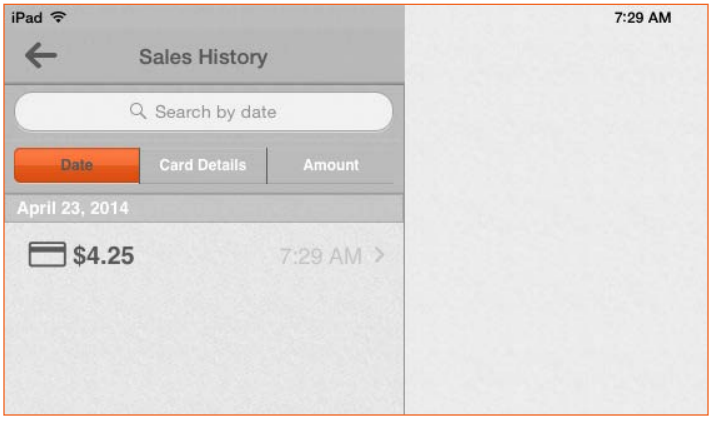
Resend Receipt

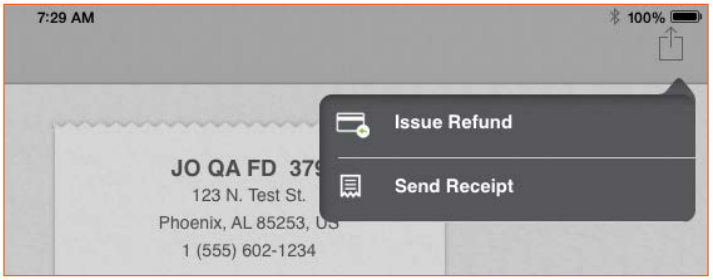
1. Tap Options, and then tap Sales History.



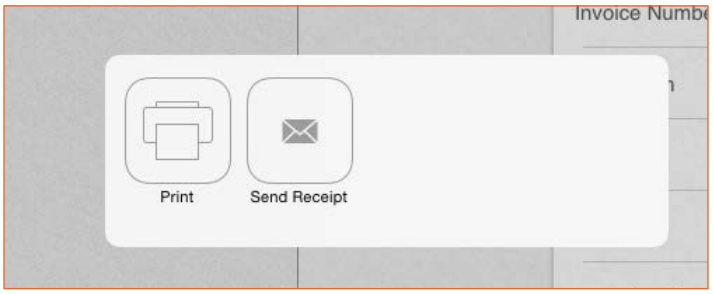
2. Select a transaction to refund.



3. Tap the share icon, and then tap Send Receipt.

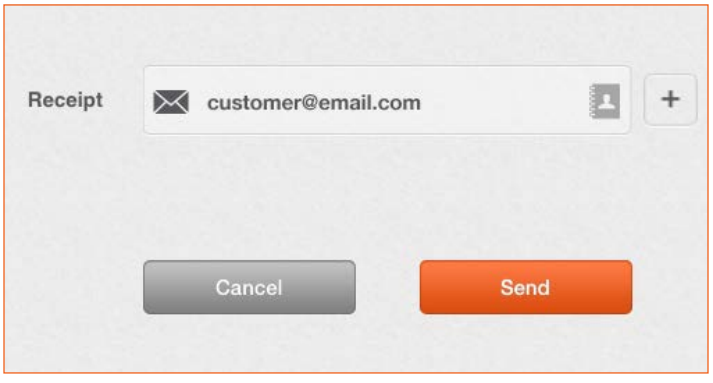


4. Tap Send Receipt.



5. Enter your customer's email address in the Receipt box, and then tap Send.

   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.



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Inventory Maintenance

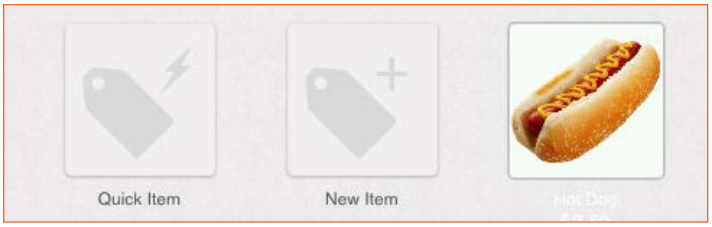
Note: Only account administrators can perform inventory maintenance.

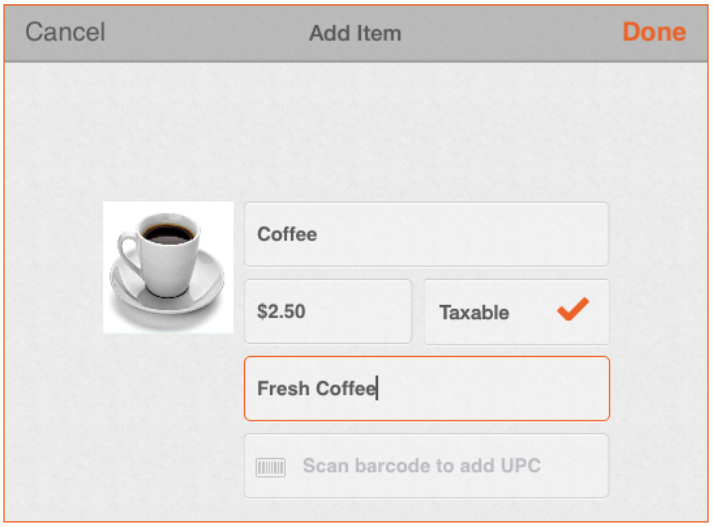
Add New Items

Adding items allows you to quickly select them for sale 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 Done.





Add Item Window

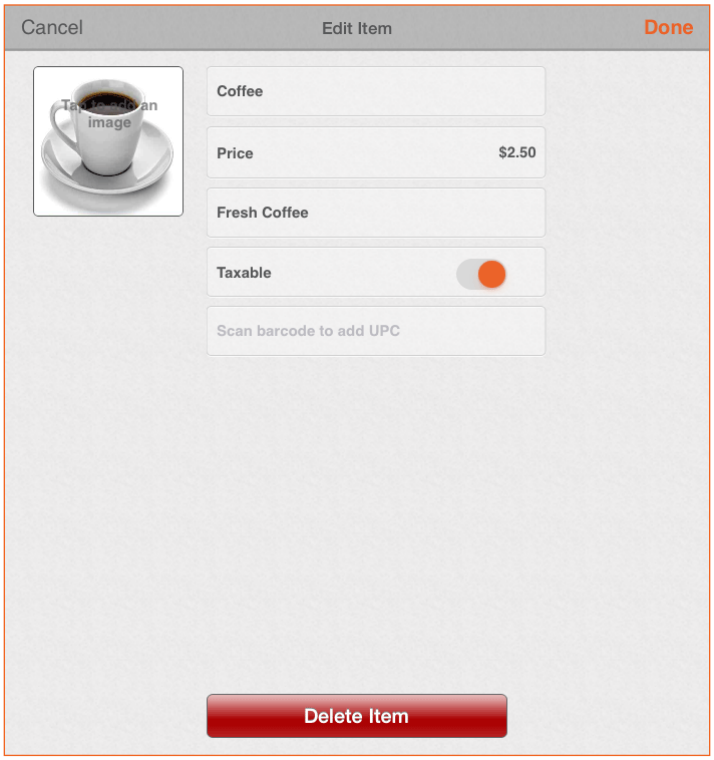
Modify or Delete Items

You can edit items or remove items that are no longer needed in 2 ways:

- Long-press the item in the item window, and then tap *Remove from inventory*.

  or

- Tap the options icon, select inventory, select the item, and then tap *Delete Item*.



Modify or Delete Items

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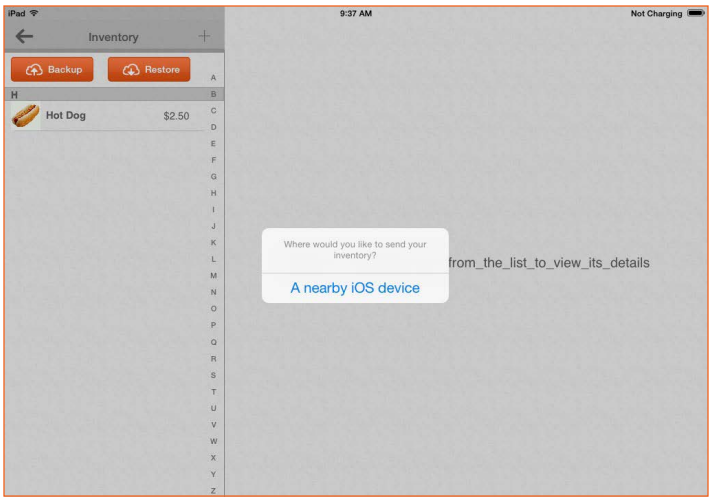
Backup and Restore Inventory

Backup or Restore 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 one of your other iOS devices. This feature makes it easy for you to make all items available for sale on multiple devices. As an example, if you decide to use an additional device for your daily sales, you can simply restore items to the new device without having to enter all of the items a second time.

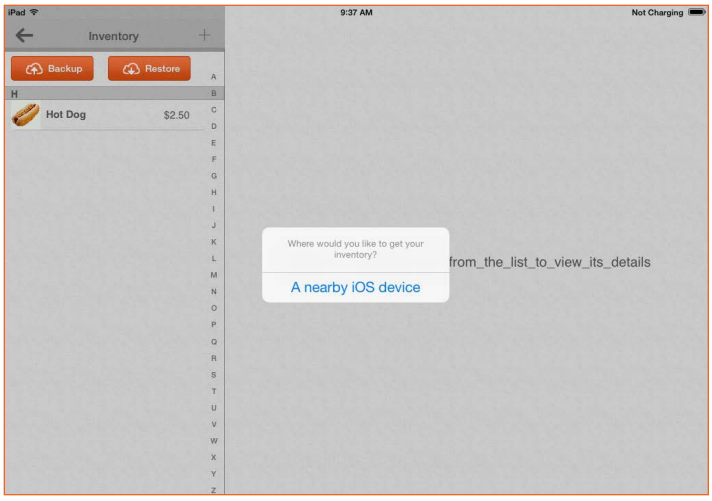
The inventory is automatically synced to the cloud when the administrator creates, deletes or modifies inventory items. Their associated users (sub-users) will receive these changes to their devices in real time.



Backup Items

Backup Items:

1. Tap *Options.*
2. Tap *Inventory.*
3. Tap *Backup Items.*
4. Tap *A nearby iOS device* to backup your inventory to another iOS device. If you use this option, Bluetooth must be enabled on both devices. Follow the on-screen prompts on both devices to complete the inventory backup.



Restore Items

Restore Items:

1. Tap *Options.*
2. Tap *Inventory.*
3. Tap *Restore Items.*
4. Tap *A nearby iOS device* to restore your inventory to another iOS device. If you use this option, Bluetooth must be enabled on both devices. Follow the on-screen prompts on both devices to complete the inventory backup.

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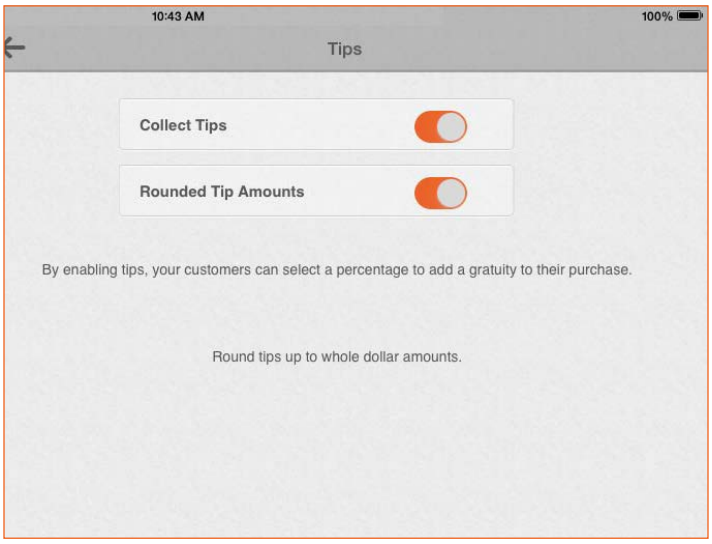
Settings

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 the Settings icon.

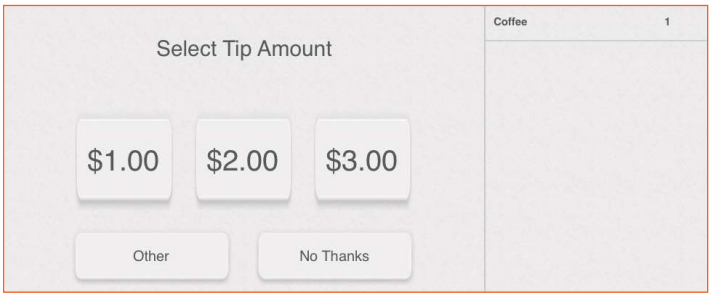
Tips

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



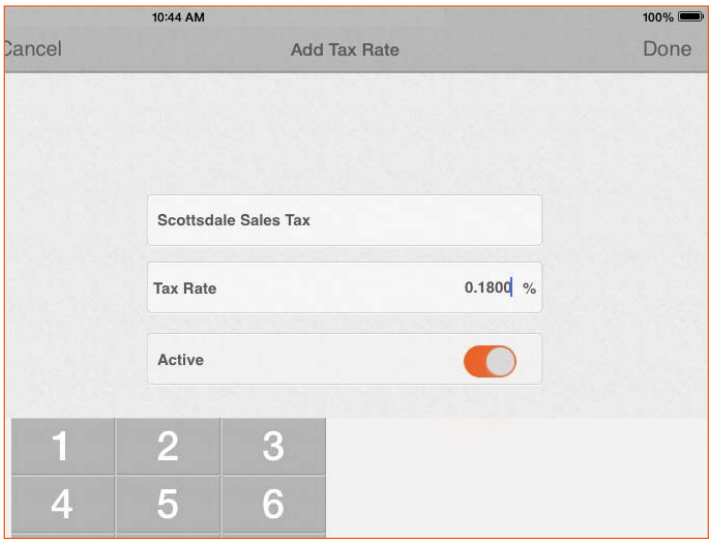
Tips Prompt

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

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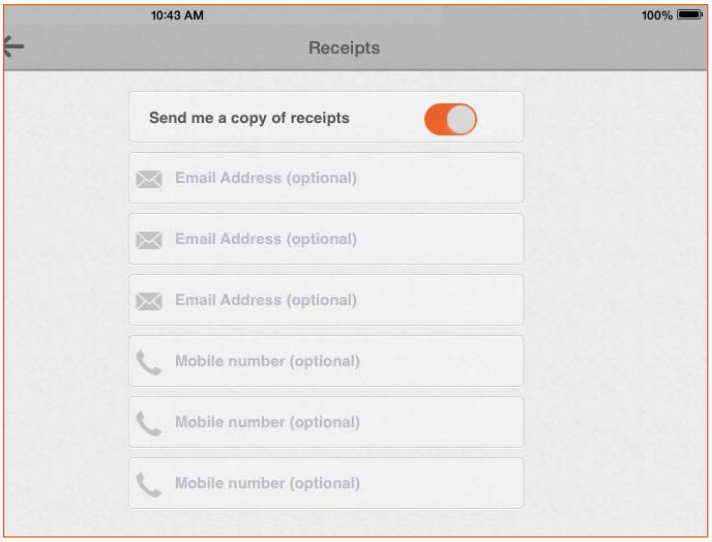
Settings

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.



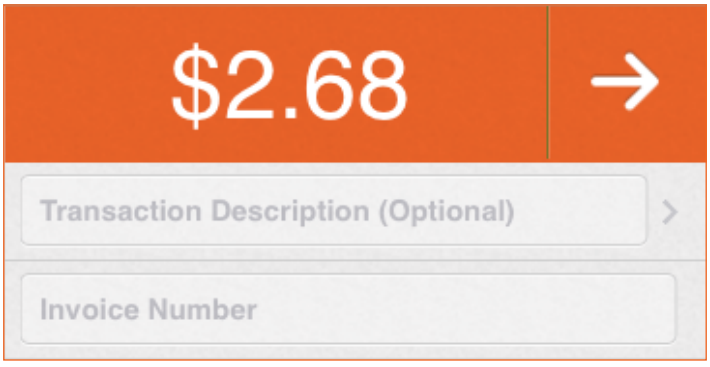
Receipts slider

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

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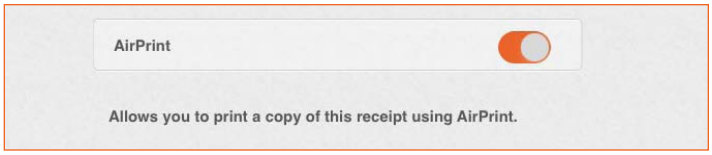
Settings

AirPrint™

After processing a transaction, you can print receipts on your printer. NOTE: you will need to configure your printer prior to printing your transaction receipts. For help with configuring your printer, please see the *AirPrint setup and troubleshooting website*.

1. Tap Options.
2. Tap Settings.
3. Turn AirPrint on or off using the slider.

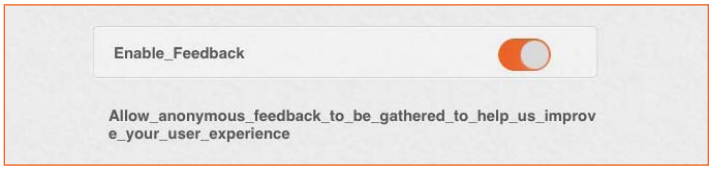


Airprint slider

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.

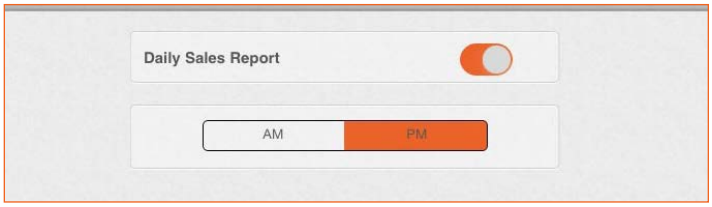


Feedback slider

Notifications

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

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



Notifications slider

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Settings

Sync Settings

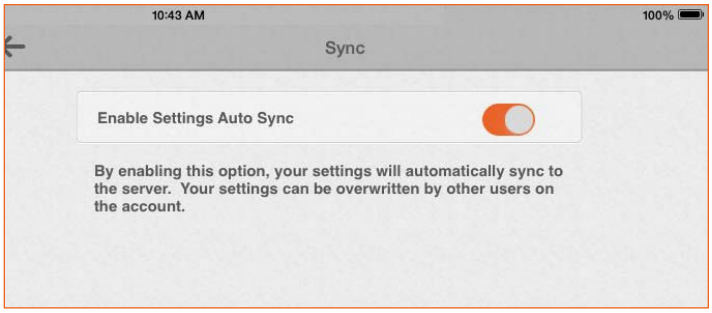
By enabling this option the account settings are managed by the administrator and shared with all users. When disabled, users are allowed to locally manage their own settings.

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

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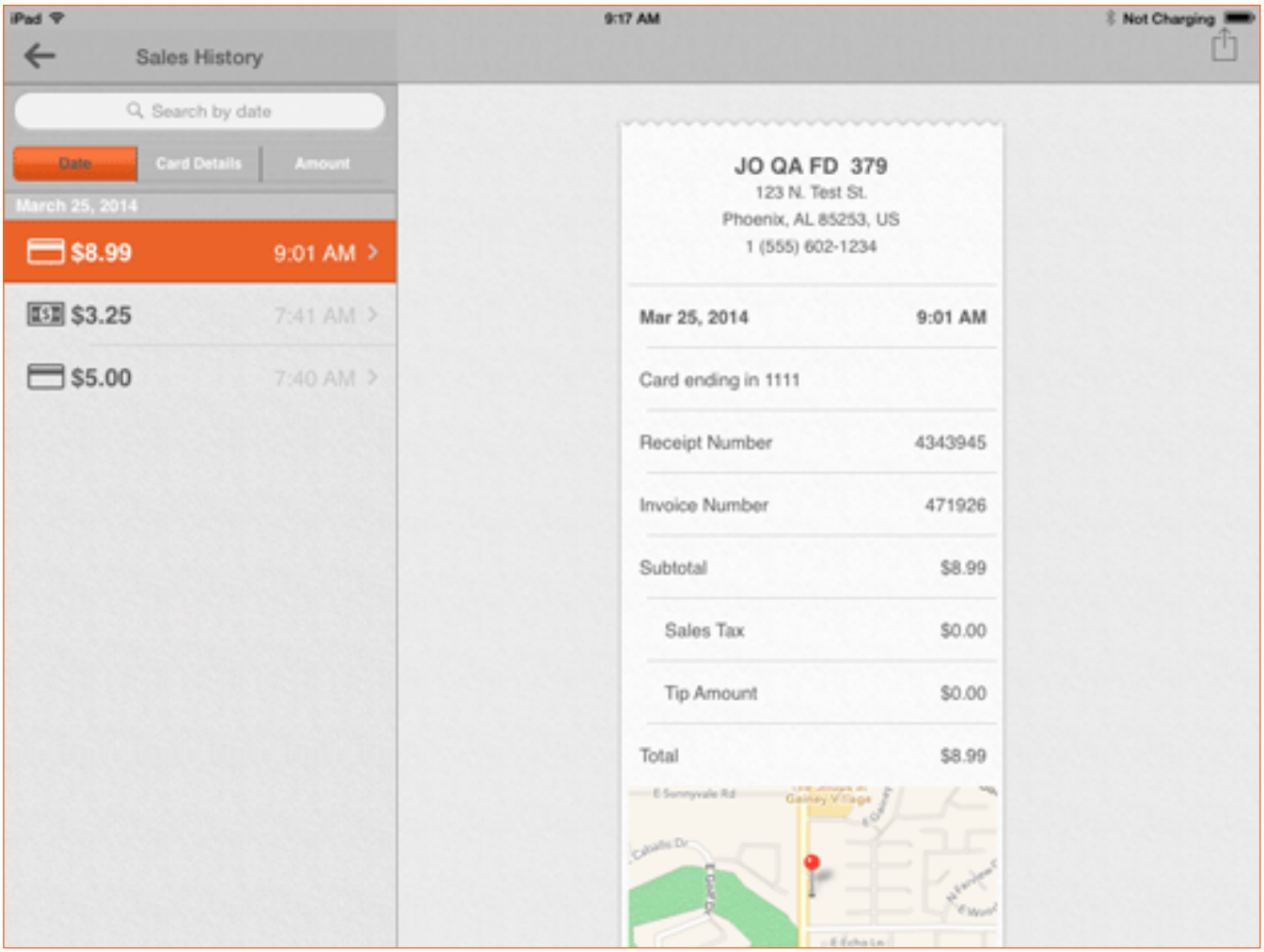
Reports

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 Date, Card Details or Amount.
4. Enter your search criteria in the search box. NOTE: when searching by date, use the on-screen calendar to select the date, and then tap Done.
5. Tap a transaction from the results list to see the details of the transaction.



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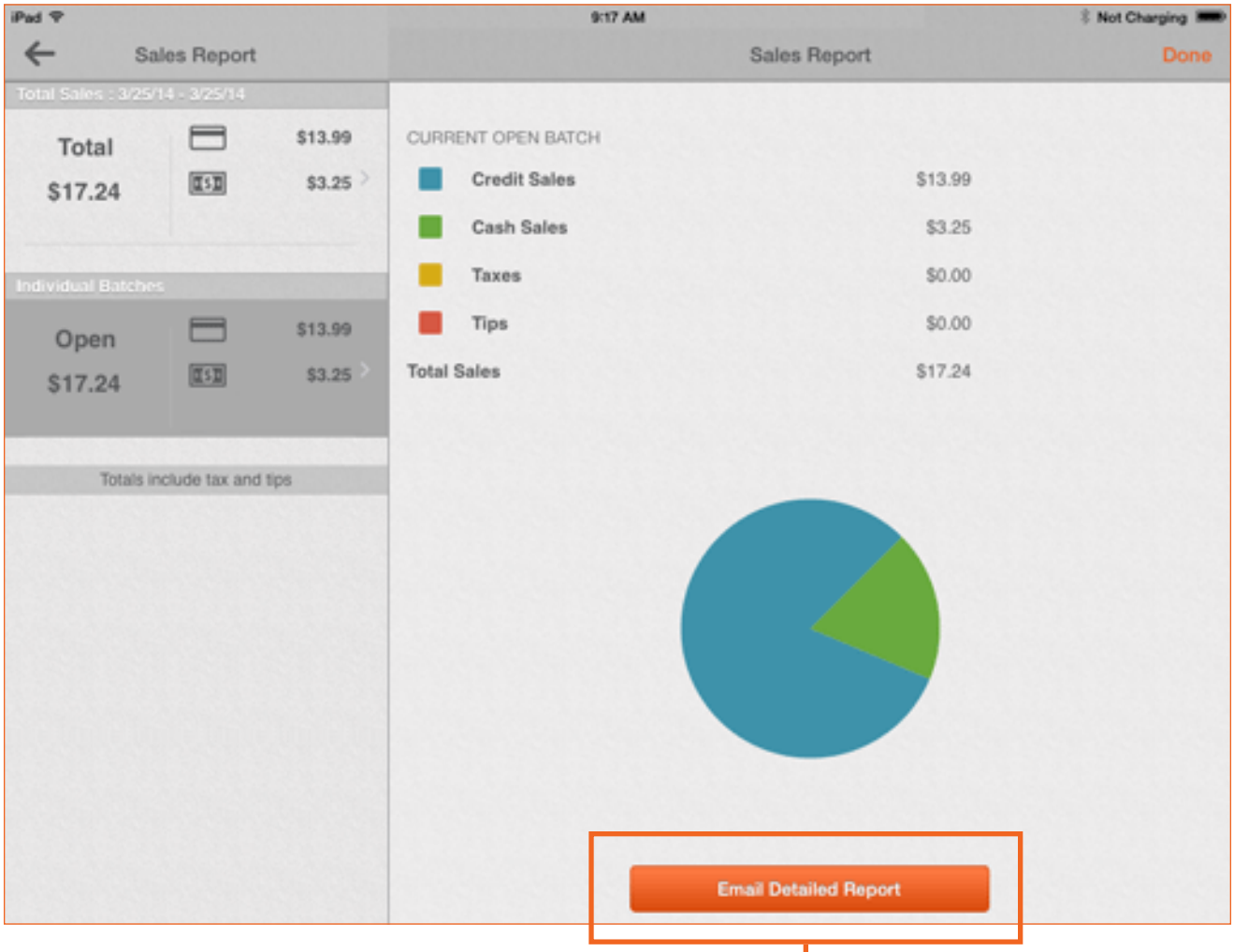
Reports

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 using the on-screen calendar.
4. Tap View Report.
5. Tap a batch from the list to display the details.



Email Detailed Report

1. Tap Email Detailed Report.
2. Enter the recipient email address, and then tap Done.

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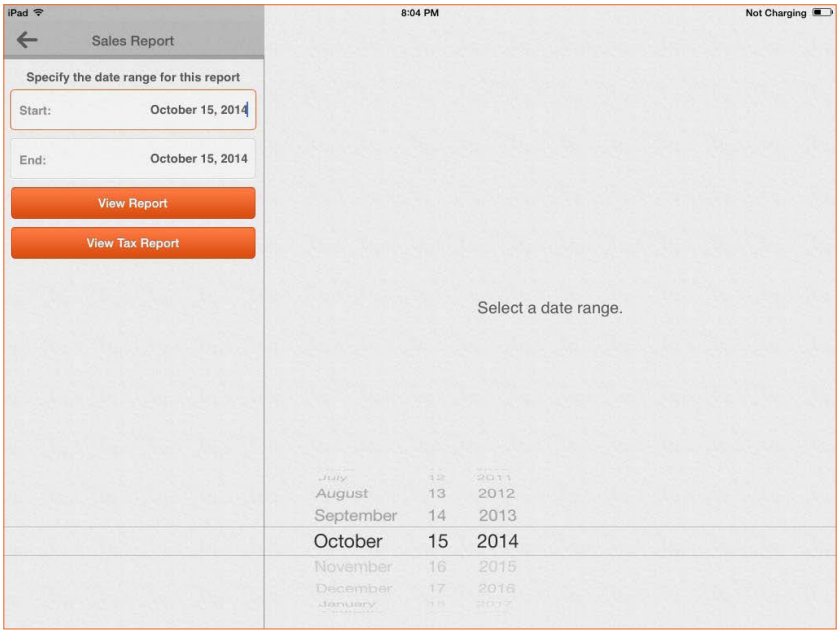
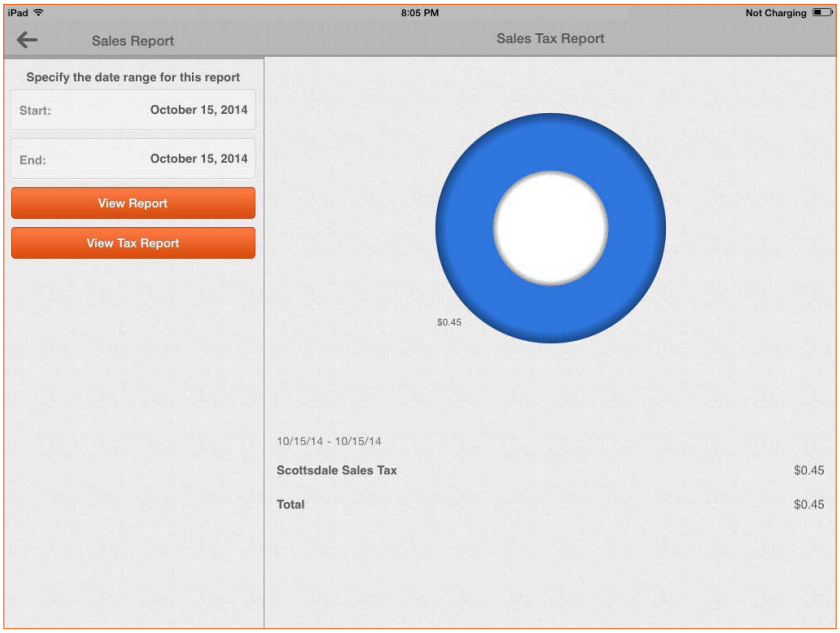
Sales Tax Report

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 View Tax Report.





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Troubleshooting and Support

Troubleshooting

Issue	Suggestion
Unable to log in to the application	• Ensure that you are connected to a network and that your device is not in airplane mode.
Forgot password	• Reset your password by tapping *Reset Password* on the Login Screen.
Password does not work	• Ensure you are spelling it correctly. • Ensure you enter the case correctly.
Card reader is not working properly	• Ensure the reader's audio jack is completely inserted into your device. • Disconnect and reconnect the reader. • Ensure headset volume is turned up to the highest setting • Power off your device and restart it.
Application closes unexpectedly	• Close all other open applications on your device. • Ensure you are connected to a network. • Ensure your device is not in airplane mode. • Power off your device and restart it.
I cannot process transactions	• Ensure you are connected to a network. • Ensure your device is not in airplane mode. • Close all other open applications on your device. • Disconnect and reconnect the reader. • Power off your device and restart it.

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

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