SwipeSimple

Mobile Application User Guide

Activate your account by calling SaleManager at 800.918.4890 or contact us at sales@salemanager.com.

Contents

Part 1: Getting Started

Downloading the app

To use the SwipeSimple mobile app, you have to first download it from the Google Play Store Store.

1. Open the Play Store and search for "SwipeSimple".

2. Download and install the SwipeSimple mobile app on your device.

3. Open the SwipeSimple mobile app.

You are ready to go!

Signing in

Signing in
The email and password you use to sign in will be provided by your payments provider.

1. Sign in to the app by typing in your email address and password in the allocated fields.

2. Press the "Sign In" button to complete the process.

Demo mode
If you want to explore SwipeSimple's functionality without signing in, you can do so by selecting "Demo mode".

Demo mode allows you to test out various functions, but limits you from processing actual transactions.

Changing your password on the first sign-in
Upon signing in for the first time, you will be prompted to change your password. Type your new password in the allocated fields.

Stay logged in
Merchants can enable this on the log in screen, and will stay logged in until they explicitly log out. There is no time limit.

Forgot password
If you've forgotten your password, you can reset it by selecting "Reset Password". We'll send you an email with instructions shortly.

Familiarizing yourself with the interface

This information confirms which Merchant Account you are currently on.
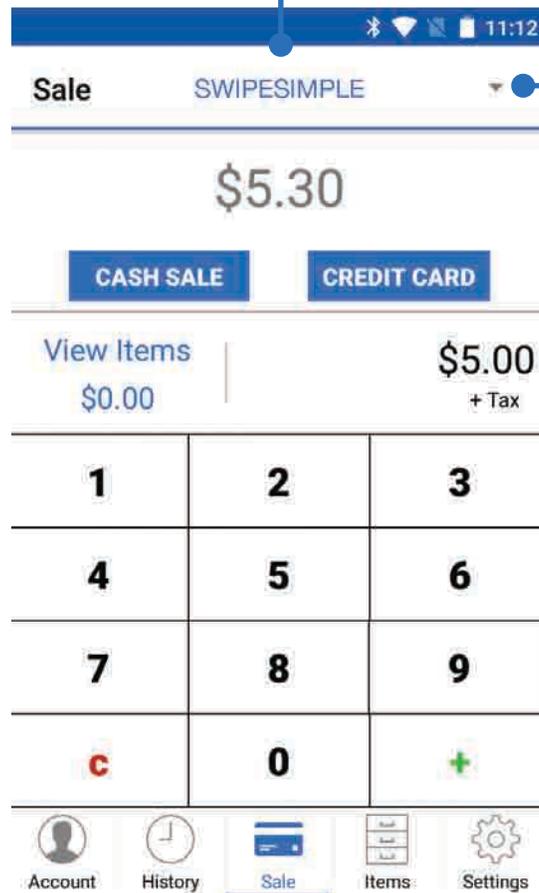
Toggle between your different accounts through the dropdown menu here.

This is your Menu bar, from which you can access all of SwipeSimple's functions. These are categorized into Account, History, Sale, Items and Settings. You are currently on the Sale screen.
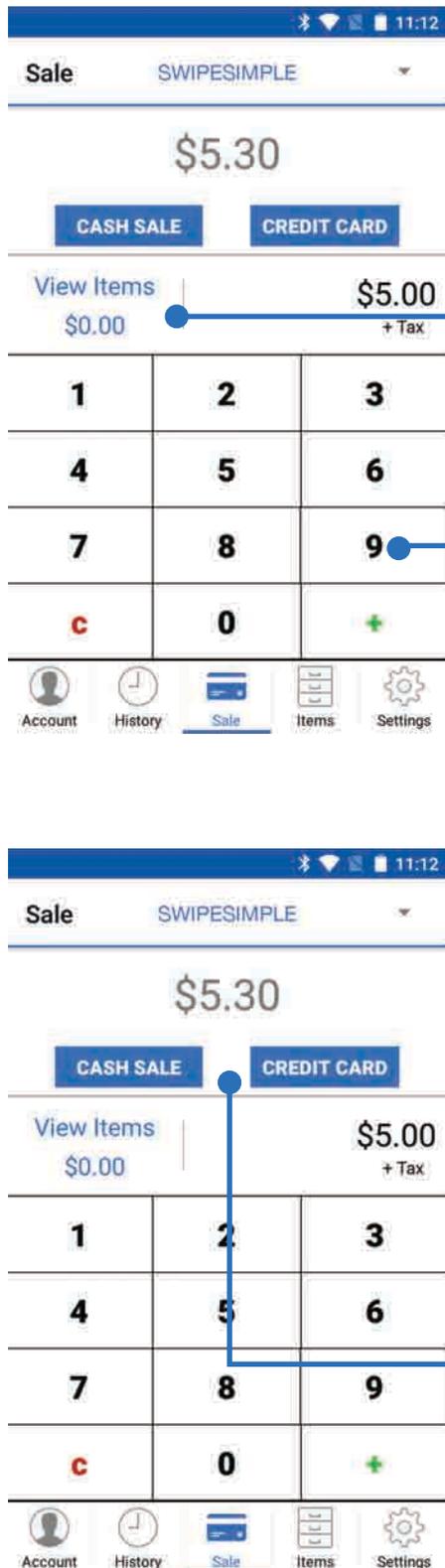
Part 2: Sale

You make transactions in the Sale section. Access the Sale section by selecting the blue Sale tab on your navigation bar.

Types of payment

Using SwipeSimple, you can accept payments through both credit cards and cash.

The next two sections illustrate the steps to take payments through each of these payment methods.

Taking a credit card payment

Step 1: Setting up the purchase

At this step, you can either manually enter an amount you want to charge, and/or select items from your inventory to add to the customer's shopping cart.

Add item to shopping cart
1. Select "View Items".

2. Select the item(s) you want to add.

3. A dropdown menu will appear. Reach your desired quantity by tapping on the plus or minus signs.

4. Select "Clear Cart" to remove all selected items.

Manually enter an amount
Use the keypad to key in the amount you want to charge, and tap "+" to add it to the total, or "c" to delete the amount.

4. When you're done, select either "Cash Sale" or "Credit Card" to move to the next step, or tap the keyboard icon to add another manual amount to the total.
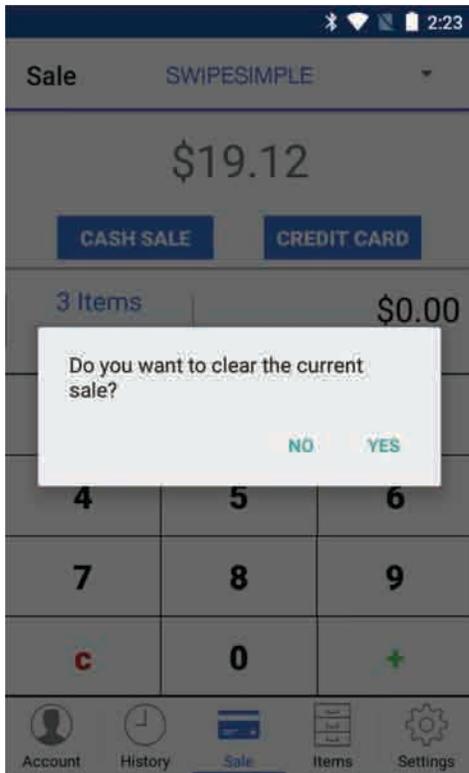
Reset active transaction

To reset the transaction, tap on "c" twice. Tapping on "c" once will clear the manually entered amount, and tapping on it twice will clear the entire transaction. Select "Yes" to clear the transaction.

Step 2: Prompt for tips

If you have tips enabled, your customers can select how much they want to tip, either from 3 adjustable tip values, or by manually inputting their tip value.

Default tips

Your customers can select from one of 3 default tip values, which are adjustable in the "Settings" menu.

Custom tips

Your customers can input their own tip amount by selecting "Other" and keying in the value on the keypad.

After you select "Continue", you'll head to the payment screen to choose the mode of payment.

*** ▼ ◢ ▣ ∎ 11:13**

← Charge

$6.30

Connect card reader

If you are having problems connecting please ensure
that the app has microphone permissions by going to
Settings -> Privacy -> Microphone

ENTER CARD INFO MANUALLY

CANCEL PAYMENT

Step 3: Taking a credit card payment

At this step, you can dip or swipe a credit card on your card reader, or manually enter the credit card information in the fields.

Credit Card Transactions
1. Check if your card reader is ready to process a dip or swipe transaction.

The image on the bottom half of the screen indicates the status of the reader. **More details below.**

2. Dip card into the chip slot or swipe card on reader.

3. When the "Dip/Swipe Successful" image shows, select the "Process Payment" button on the screen to advance to the next step.
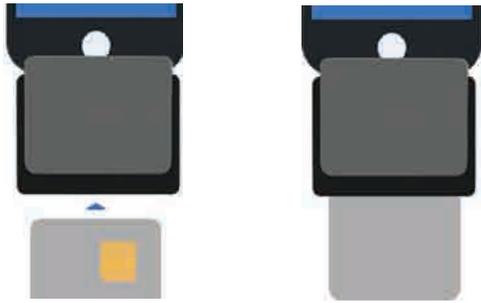

Insert Card Reader
Your reader is not detected. Either insert the reader or dial up the volume (for readers which plug into headphone jacks.)

Reader Connected
Your reader is detected. Wait a moment to dip/swipe the credit card.

Step 3a: Taking a chip card payment

Dip Card

If your customer uses a chip card, you can attempt to dip the credit card now. Dip the card into the slot at the back of the reader, with the chip facing the front.

Dip Successful

The chip card has been recognized by the reader. You can process the payment now. Please ensure that the card remains inserted throughout the entire transaction, and is only removed when prompted by SwipeSimple. Removing the card prematurely will cancel the transaction.

# Step 3b: Taking a magnetic stripe card payment
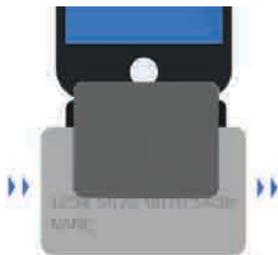
Swipe Card

If your customer uses a magnetic stripe card, you can attempt to swipe the credit card now. Swipe the card through the slot at the front of the reader, with the magnetic stripe facing the back.

Swipe Successful

The credit card swipe is successful. You can process the payment now.

Step 3c: Taking a manually entered payment

Charge Manually

Enter your card details

VISA 4242 12/20 123 1001
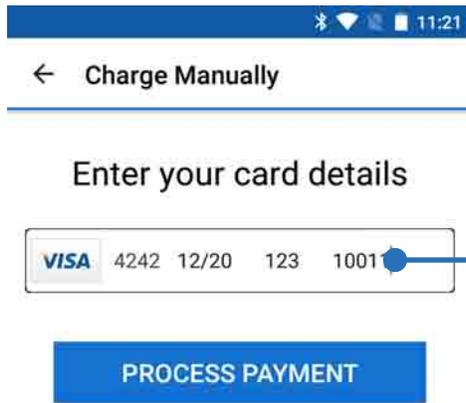
PROCESS PAYMENT

Manually enter details
Use the keypad to key in card number, expiration date and CVV number on the back of the card.

Verify

$6.30

Process Visa ending in 4242?
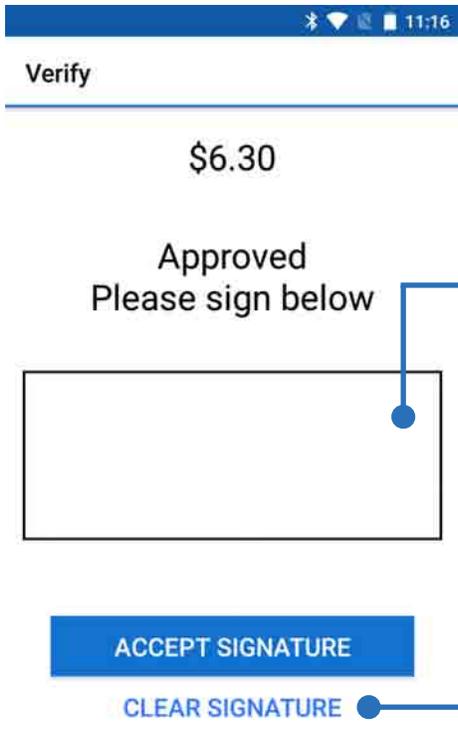
PROCESS PAYMENT
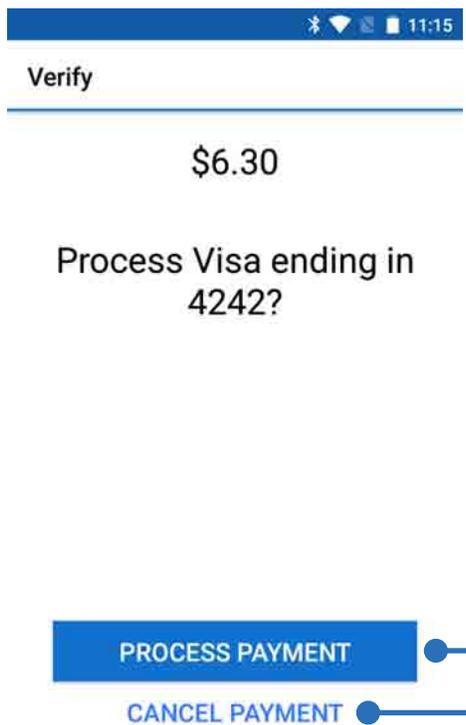
CANCEL PAYMENT

Process payment
Tap on "Process Payment" after entering all respective fields. For chip card transactions, please ensure that the card remains inserted throughout the entire transaction.

Cancel payment
Tap on "Cancel Payment" to reset the transaction.
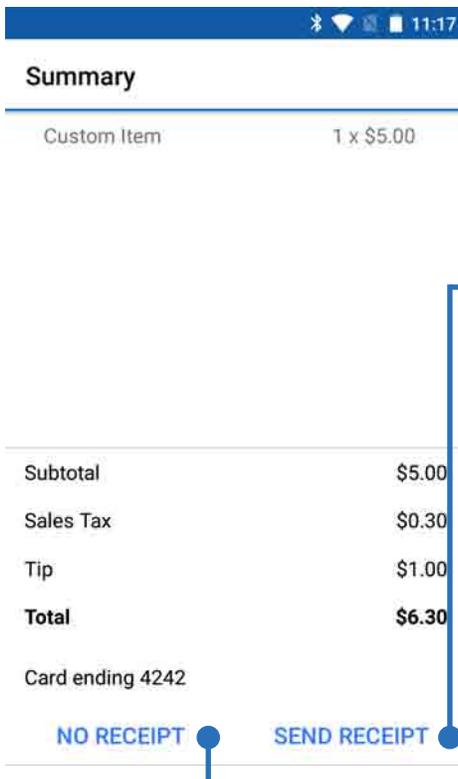
Step 4: Capture signature

If you have signatures enabled, the customer can sign by tracing out their signature on your device's screen.

Enter signature
Let your customers trace out their signatures within the signature box, using their fingers or a stylus.

Clear signature
Select "Clear Signature" at the bottom of the screen, to reset the signature box.

Step 5: Email receipt

At this step, you can view the e-receipt on your device, and you can choose to send the e-receipt to the customer's email address.
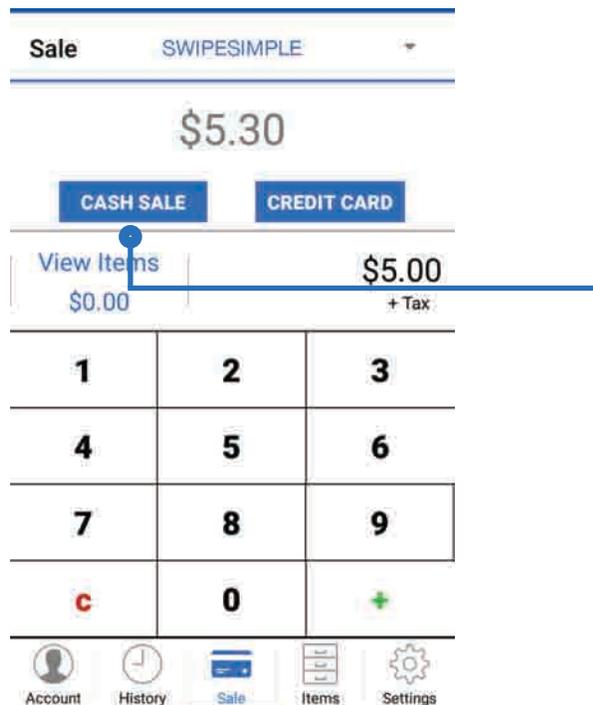
Send receipt
Select "Send Receipt" to email or text a receipt to your customer.

Enter your customer's email address or phone number into the next screen.

To not send a receipt, select "No Receipt"

Taking a cash payment

The steps involved in taking a cash payment are very similar to that of a credit card payment, and simpler.

Follow the steps listed in Taking a credit card payment, with slight changes as noted below:

1. On Step 1, select "Cash Sale".

2. Determine the amount gratuity to be charged in Step 2.

2. You will automatically skip Step 3 and Step 4.

3. Select "Process Payment" to confirm the cash sale.

4. Complete the payment the same way as Step 5.

Part 3: Account

In the Account section, you can view statistics of your transactions for multiple user accounts. Access the Account section by selecting the leftmost tab on your navigation bar.

Viewing your account statistics
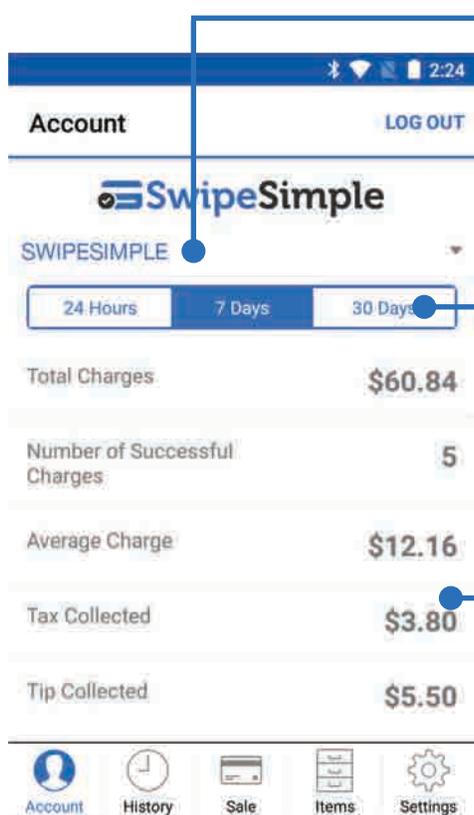
Changing Account
If you have multiple merchant accounts tied to your SwipeSimple account, you can select this item to choose a different merchant account from the list.

Changing Time Periods
View your account summary based on statistics from the last 24 hours, last 7 days, or last 30 days. Toggle each mode by selecting its respective button.

View Account Summary
Total Charges: The total amount charged to customers over the time period specified.

Number of Successful Charges: The total number of charges approved over the time period specified.

Average Charge: Total Charges divided by Number of Successful Charges.

Tax Collected/Tip Collected: Total amount of taxes/tips collected over the time period.

14

Part 4: History

In the History section, you can view detailed transaction data, void and refund transactions, and resend receipts. Access the History section by selecting the History tab from your navigation bar, second from the left.

View transaction history
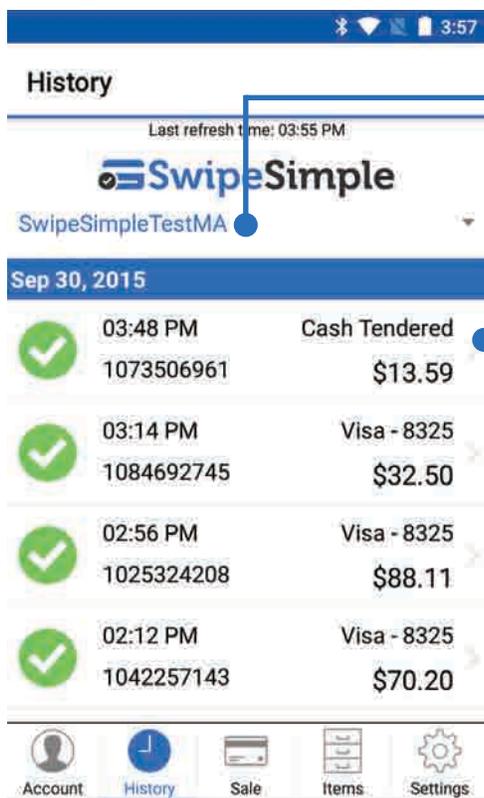
View the transaction history of another account
Select this and change to the desired account.

Understanding your transaction history
Transactional information is organized by separate transactions, descending in time from the most recent. This includes:

Status of the transaction:
✅ Approved   ⊖ Voided
↩ Refunded   ⛔ Declined

Customer Name:
E.g. "1073506961"
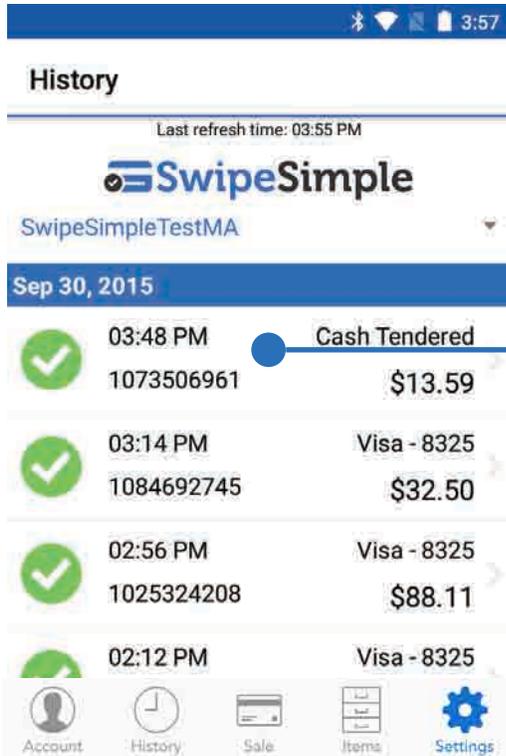
Time and Date of Transaction:
E.g. "03:48 PM", and "Sep 30, 2015".

Card Details:
Card issuer (VISA, MasterCard, AMEX, or others), and the last 4 digits of the card number.
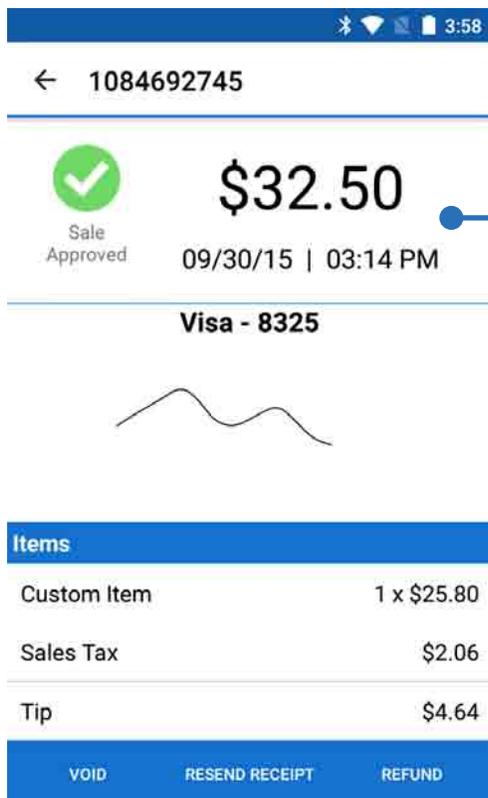
Transaction Value:
Shows the amount transferred. "$13.59".

Access detailed purchase information, voids and refunds
Press anywhere in the space of each transaction. It will lead you to the Transaction screen below.

On the Transaction screen, you can view which items and their amounts involved in the specific transaction. If the customer gave a signature, you can view it here.

From here, you can perform Voids and Refunds, and also Resend Receipt.

Voids
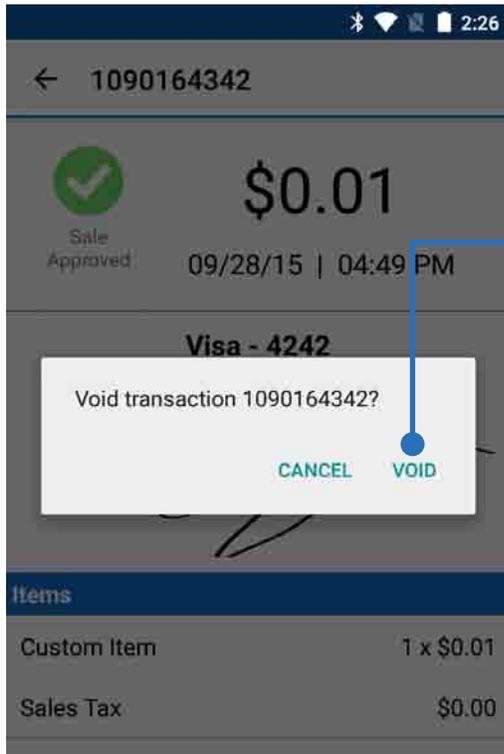
To void the selected transaction, select Void at the bottom-left corner of the transaction screen.

On the confirmation window that appears, select "Void" to confirm.

Voids are only available for a short time after a transaction. If the Void option is not displayed, you may only do a Refund instead.

Refunds
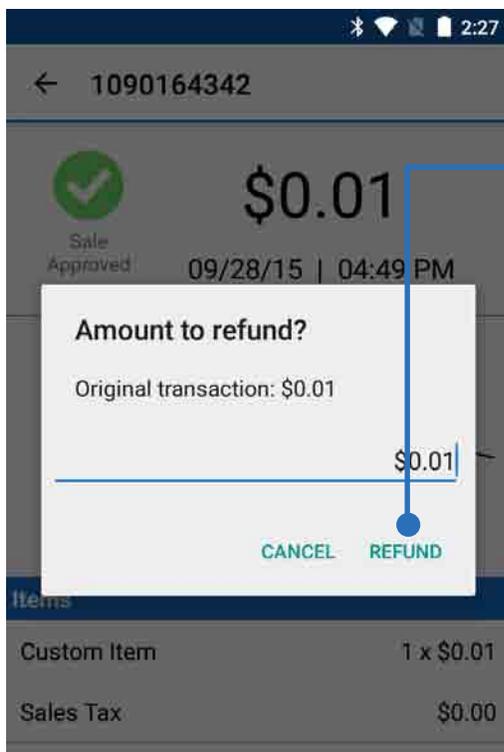
To make a refund, select Refund at the bottom-right corner of the transaction screen.

On the window that appears, enter the amount you wish to refund, and select "Refund" to confirm.

Partial refunds
You can refund part of a transaction, and the partial refund will show up as a new record.

To refund the rest of the transaction, return to the original transaction and perform the refund.

The total amount you refund cannot exceed the total of the transaction.

Resend Receipt

To resend a receipt, select Resend Receipt at the bottom of the transaction screen.

On the window that appears, type in the customer's email address and/or phone number, and select "Send Receipt" to confirm.

Part 5: Items

In the Items section, you can create new items and edit existing items in your inventory. You can view the quantity in stock for each item and also sort your items by name or price. Access the Items section by selecting the Items tab on your navigation bar, second from the right.

Sort your inventory
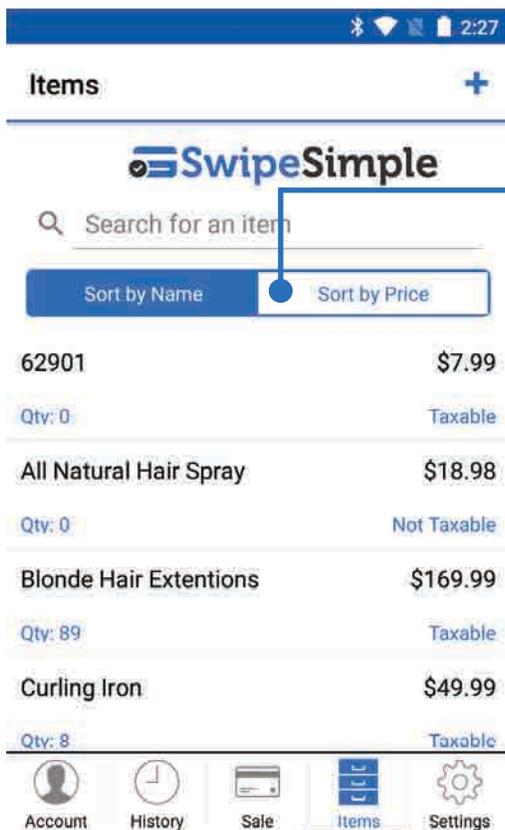
Sort your items by Name or Price
Toggle your desired sorting method by selecting either one of these buttons.

Edit item

Edit item
Select the desired item on the Items list to enter the Edit item screen.

Here, you can edit the name, SKU, price, whether the item is taxable, whether you want inventory tracking for the item, and the stock quantity of the item.

Select "Update Item" at the bottom to confirm your changes, or select "Cancel" to return to the previous screen.

Create a new item

Create item
Select "Create Item" at the top right of the Items screen.

Here, you can create a new item by entering the item's name, SKU, price, whether the item is taxable, whether you want inventory tracking for the item, and the stock quantity of the item.

Select "Create Item" at the bottom to add your new item to the inventory, or select "Cancel" to return to the previous screen.

Part 6: Settings

In the Settings section, you can set preferences for whether to require signatures, add sales tax, and prompt for tips. You can also access support contact details and information about SwipeSimple.

Familiarizing yourself
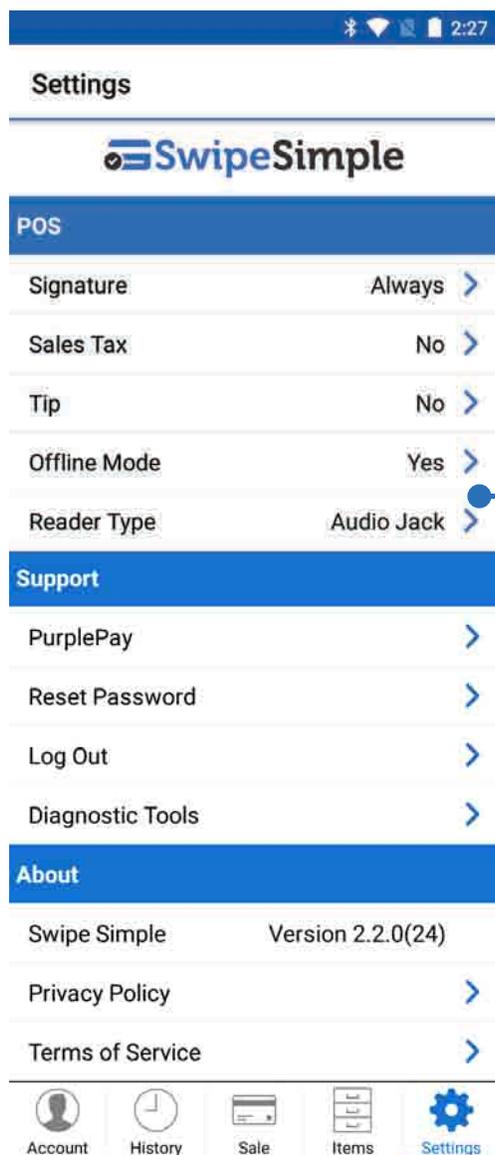
Here, you can see the current selection for each adjustable setting.

E.g. Sales Tax is currently set to "No", which means that you are not charging sales tax to your customers.

Change Settings
Press any part of the area occupied by the setting you desire to change in order to enter the respective settings screens for Signature, Sales Tax, Tip, Offline Mode, Reader Type, Support Information, Reset Password, and Diagnostic Tools.

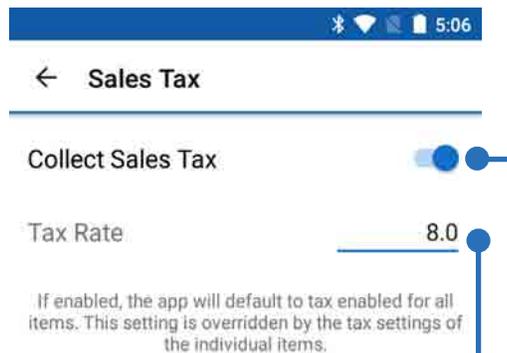# Turning signatures on/off
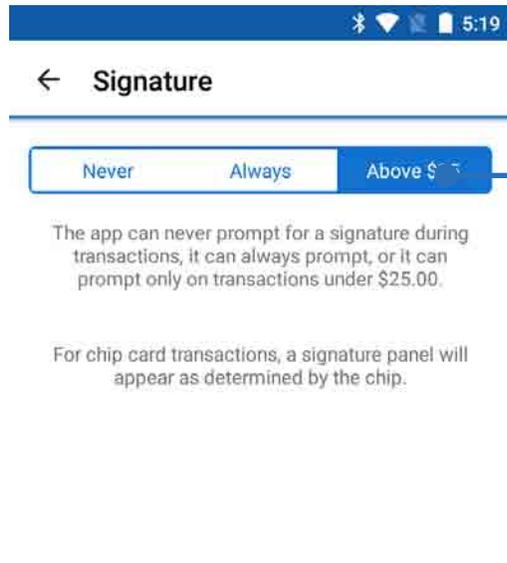
Turn signatures on/off
Select from either of these 3 options:

Never: The app never prompts for a signature

Always: The app always prompts for a signature
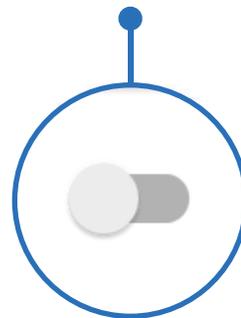
Above $25: The app prompts only on transactions above $25
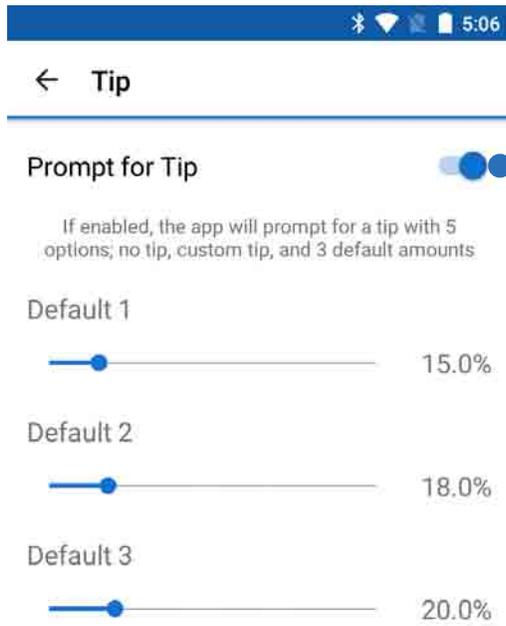
Sales tax

Turn sales tax on/off
Toggle this button on if you want to collect sales tax from your customers. Sales tax is currently on. When off, it shows like this:

Modify sales tax
Select this box to input the percentage sales tax you want to collect from your customers. Only applicable when sales tax is toggled on.

Tips

Prompt for Tip

If enabled, the app will prompt for a tip with 5 options; no tip, custom tip, and 3 default amounts

Default 1   15.0%

Default 2   18.0%

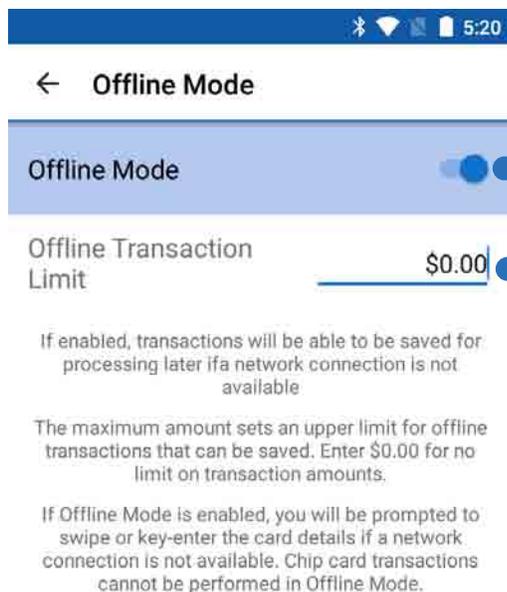Default 3   20.0%

Turn tips on/off
Toggle this button on if you want to prompt your customers for tips.

Modify default tip values
This section allows you to modify the 3 default tip selections presented to your customers.

Hold and drag each white button along it horizontal axis to edit each of the 3 tip values.

Offline mode

Offline Mode

Offline Mode

Offline Transaction Limit $0.00

If enabled, transactions will be able to be saved for processing later ifa network connection is not available

The maximum amount sets an upper limit for offline transactions that can be saved. Enter $0.00 for no limit on transaction amounts.

If Offline Mode is enabled, you will be prompted to swipe or key-enter the card details if a network connection is not available. Chip card transactions cannot be performed in Offline Mode.

Offline mode enables you to continue taking payments without an internet connection. However, offline mode is not compatible with chip card transactions. You will not be able to process chip card transactions if you are offline.

Turn offline mode on/off
Toggle this button on if you want to enable the ability to take payments offline.
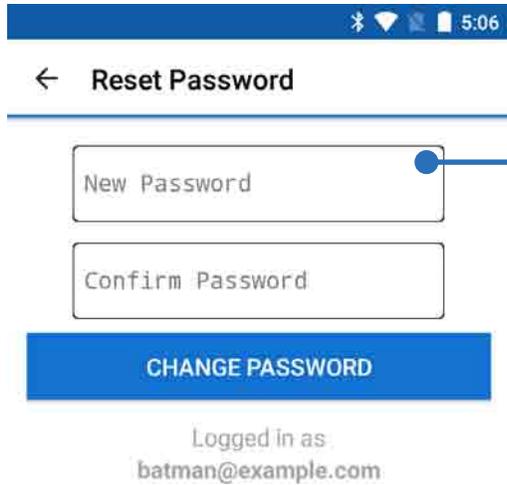
Set maximum amount for offline transactions
Set an upper limit for offline transactions that can be saved, by keying in the desired amount here.

Support

The Support screen contains contact information for obtaining support for your merchant account and SwipeSimple.
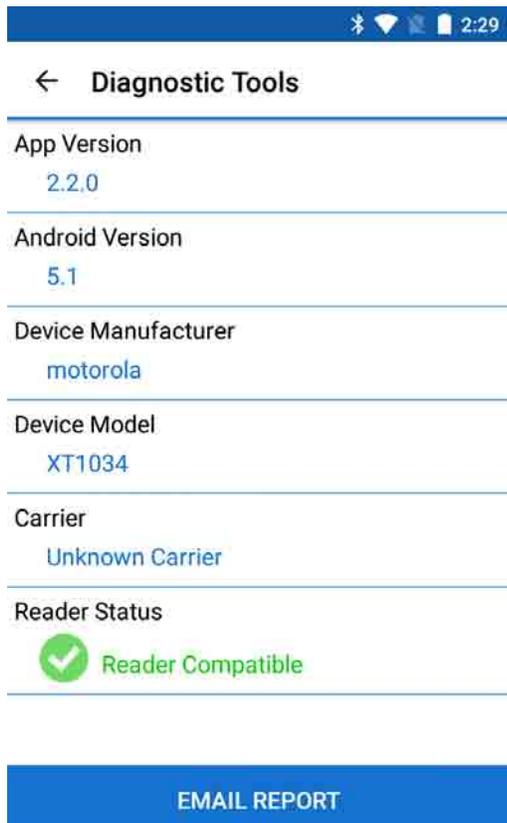
Reset Password

Reset password

Enter your new password in the "New Password" and "Confirm Password" spaces, and select "Change Password" to confirm.

Diagnostic Tools

Diagnostic tools

This section shows you details of the app version, Android version, manufacturer of your mobile device, model of your mobile device, and whether the SwipeSimple card reader is compatible with your device.

You can send these details to any email address, by selecting "Email Report" at the bottom.

About

The About screen contains information of the version of SwipeSimple you are currently using. Providing this info can be useful for handling any complex support issues.