*e*PNMobile Android Tablet v3.1.40

User Reference Guide

eProcessing Network LLC
10/13/2014

*e*PNMobile Android Tablet v3.1.40

User Reference Guide

Table of Contents

Overview

◆ **ePNMobile**, from **eProcessingNetwork**, gives merchants the ability to process different types of swiped or manually keyed transactions through a mobile device. These transactions include: credit card, debit card (signature debit, not PIN), cash, and check transactions.

Requirements

◆ An **eProcessingNetwork** account is required.

◆ An Android Tablet is required.
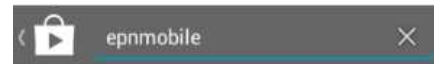
◆ **ePNMobile** license(s) and/or account.

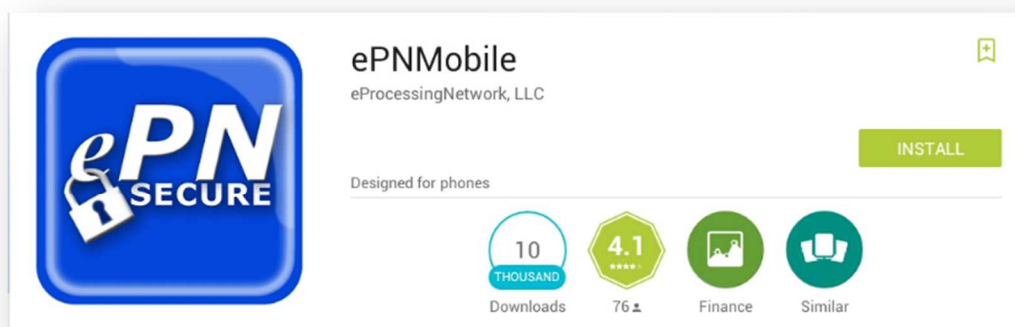# Downloading *e*PNMobile for Android Tablet

1. From your Android Tablet, tap on the Play Store icon:

2. Type in "**ePNMobile**" in the app search box:

3. The app will appear in the results section as shown in Figure 1.

Figure 1 – The *e*PNMobile App

4. Tap the "**INSTALL**" button to download.

Activating Your Account

To activate your account, follow these steps:

1. Find and tap the *e*PNMobile icon on your Android Tablet.

Figure 1a – *e*PNMobile icon

2. This brings you to the "*e*PNMobile Entry Screen" (Figure 2), where you can also "**Test Drive**" the app (no real transactions will take place) or "**Apply for a**n **Account**", which should only be done if you have no current Merchant Service Provider presently.
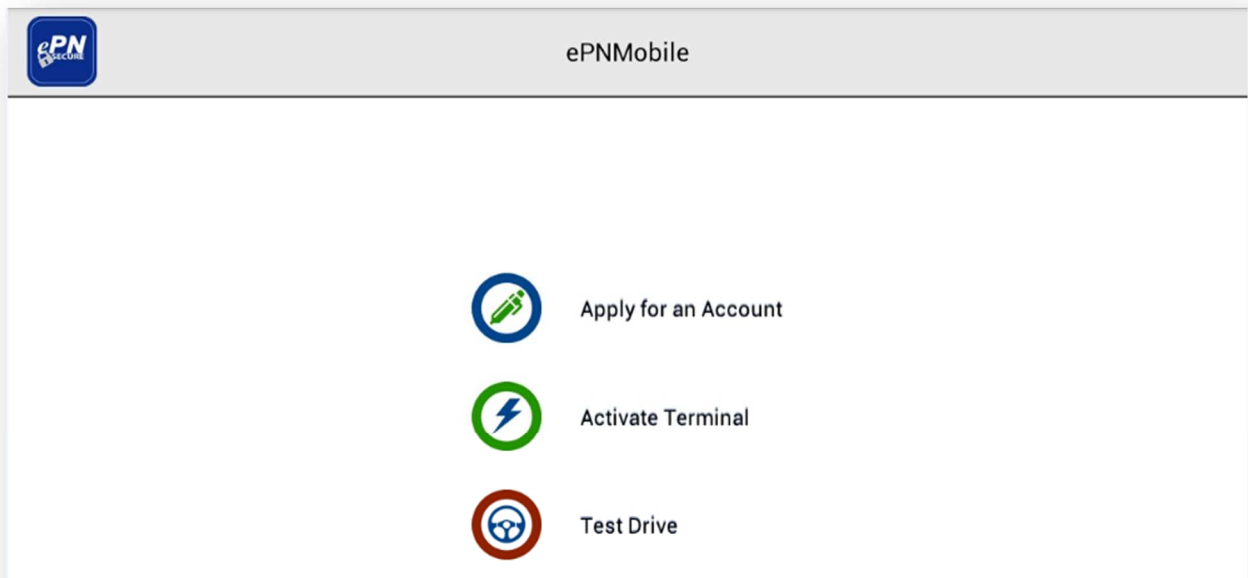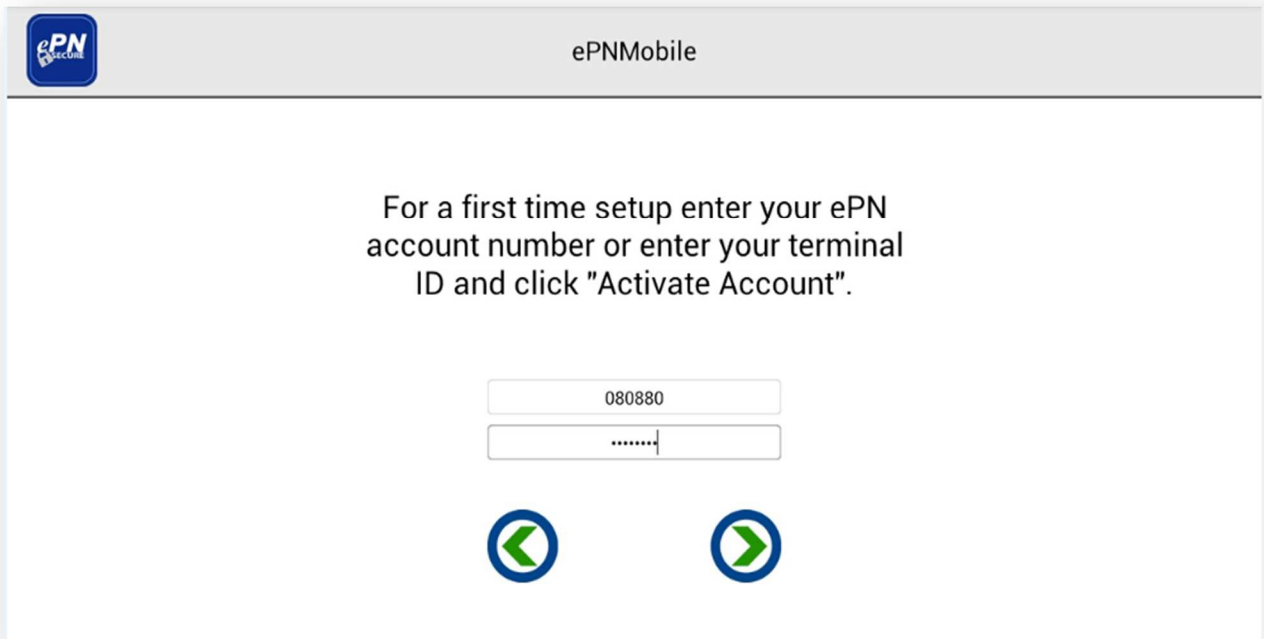
    Tap on "**ACTIVATE MY ACCOUNT**":

Figure 2 *e*PNMobile Entry Screen.

3. Enter your *e*PN Account Number (also known as your Gateway ID) and your account Password and tap on "**Activate My Account**" (Figure 2a).
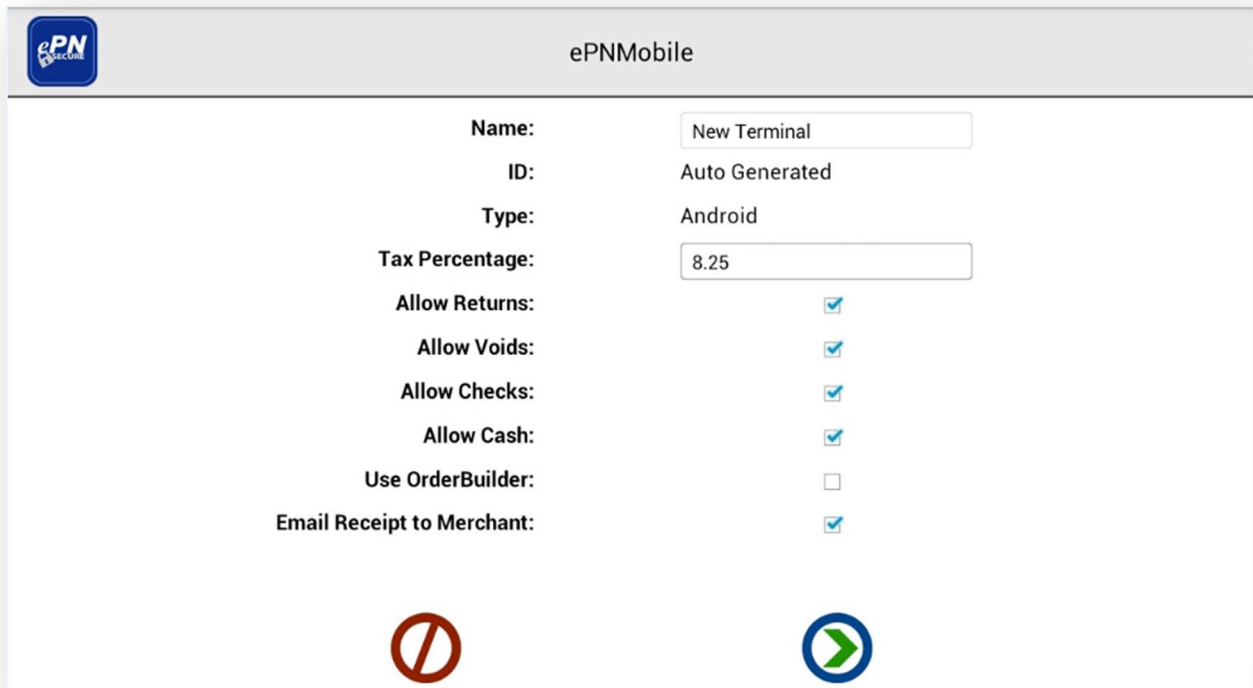

Figure 2a – Login Screen.

4. At the "**Terminal Configuration Screen**" (Figure 3), enter a terminal "**Name**", which will help find the Android tablet configuration in the future. You may also define the following:
   a. **Tax Percentage** – enter a tax percentage to charge on each line item. This percentage can be overridden at the time of a sale.
   b. **Allow Returns** – enabling this button allows this terminal the ability to process refunds/returns.
   c. **Allow Voids** – enabling this button allows this terminal the ability to void transactions that have yet to settle (batch out).
   d. **Allow Checks** – enables the terminal for check processing. You MUST have a check vendor configured prior to performing this task. If you are interested in accepting checks, please speak to your Merchant Services Provider.
   e. **Allow Cash** – enables the terminal to accept cash sales.
   f. **Use Order Builder** – enables the terminal for inventory sales. You MUST first have the gateway account enabled for *e*PNInventory. If you are interested in performing inventory sales, please speak to your Merchant Services Provider.
   g. **Email Receipt to Merchant** – enabling this option sends the merchant an email confirmation for every transaction.

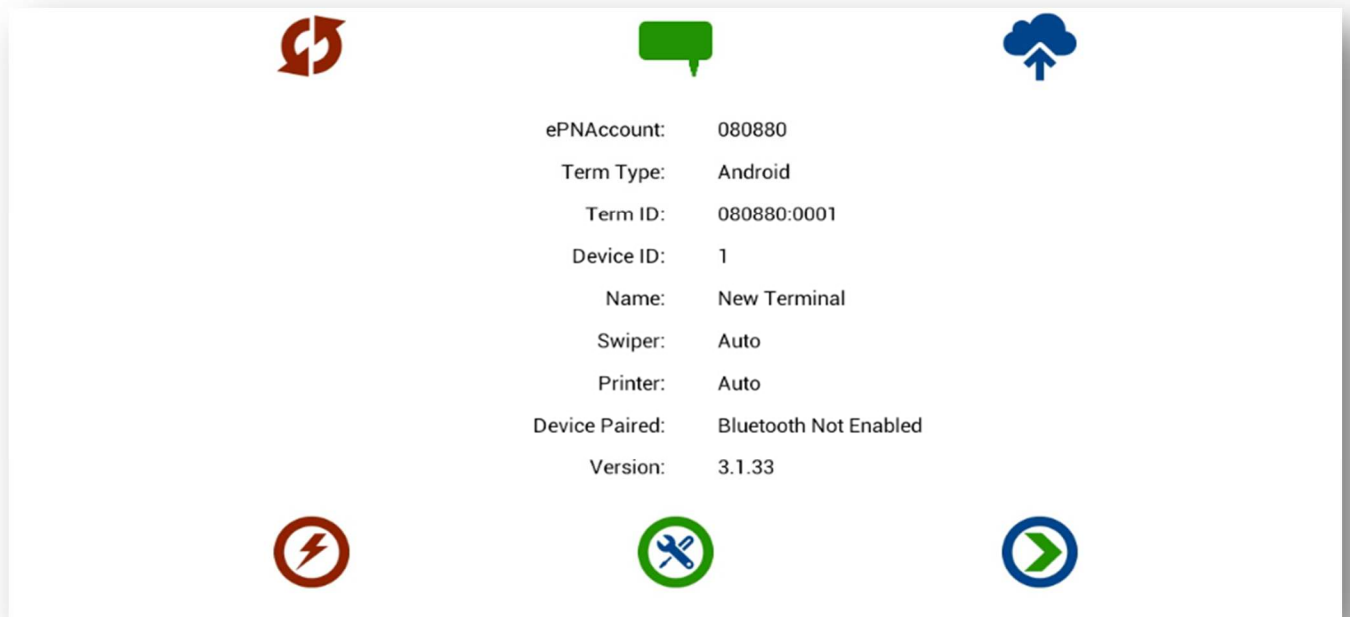5. Once all settings are configured as you desire, tap to continue.

Figure 3 Terminal Configuration Screen.

6. At the "Settings Screen" (Figure 4), you may perform the following actions:

   a. **Reload Configuration –** the Merchant Support Center (online gateway account) allows you to make server-side changes to a terminal (such as disabling returns/refunds). To make these changes effective, you must press 🔄

   b. **Select Peripheral** – This is done automatically for Audio Jack credit card readers. However, if there is a failure in the auto recognition functionality, our Support Department may request you select this button: 🟩

   c. **Reset Reader –** This button, 🟥, is used to reset the reader if there is a failure in the reader and "Select Peripheral" button did not correct the issue.

   d. **Upload Logs** – only tap this button, ☁️⬆️, if requested by our Support Department. This is only for troubleshooting purposes.

   e. **Reactivate My Account** – this button, ⚡, takes you back to the **"ePNMobile Entry Screen"** where you can choose **"Activate My Account"** and change terminal settings.

f. **Terminal Settings –** This button, , allows you to update your terminal settings (such as enabling/disabling voids/returns) without reactivating your account or having to access the Merchant Support Center.

g. **Continue** – only select this button, , when you have confirmed all settings to be correct and are ready to begin using *e*PNMobile for sales.

ePNAccount:	080880
Term Type:	Android
Term ID:	080880:0001
Device ID:	1
Name:	New Terminal
Swiper:	Auto
Printer:	Auto
Device Paired:	Bluetooth Not Enabled
Version:	3.1.33

Figure 4 – Settings Screen

Making a Sale - Single or Multiple Items

The following instructions are intended for merchants who will be using *e*PNMobile in a non-inventory environment.

To process a credit card sale, follow these steps:

1. From the main screen, enter the "Amount", "Tax" and "Description" of the product/service being sold (Figure 6).

   a. Note that you can add multiple items by:

      i. Filling out the amount, tax and description fields.

ii. Once these three fields are complete, tap the "+" on the bottom left of the screen and itemizes on the left hand side of screen as shown on Figure 6.

iii. Repeat these steps as many times as necessary.

Figure 5 – Non Inventory Sale Main Screen.

Figure 6 – Creating Line Items.

2. Fill in as much of the customer information on the top left hand corner as possible. Also note that you may fill in additional information by tapping the "**Customer Icon**" (Figure 7), including the QuickBooks® invoice number, if you use that accounting software with the *e*PNPlugIn.
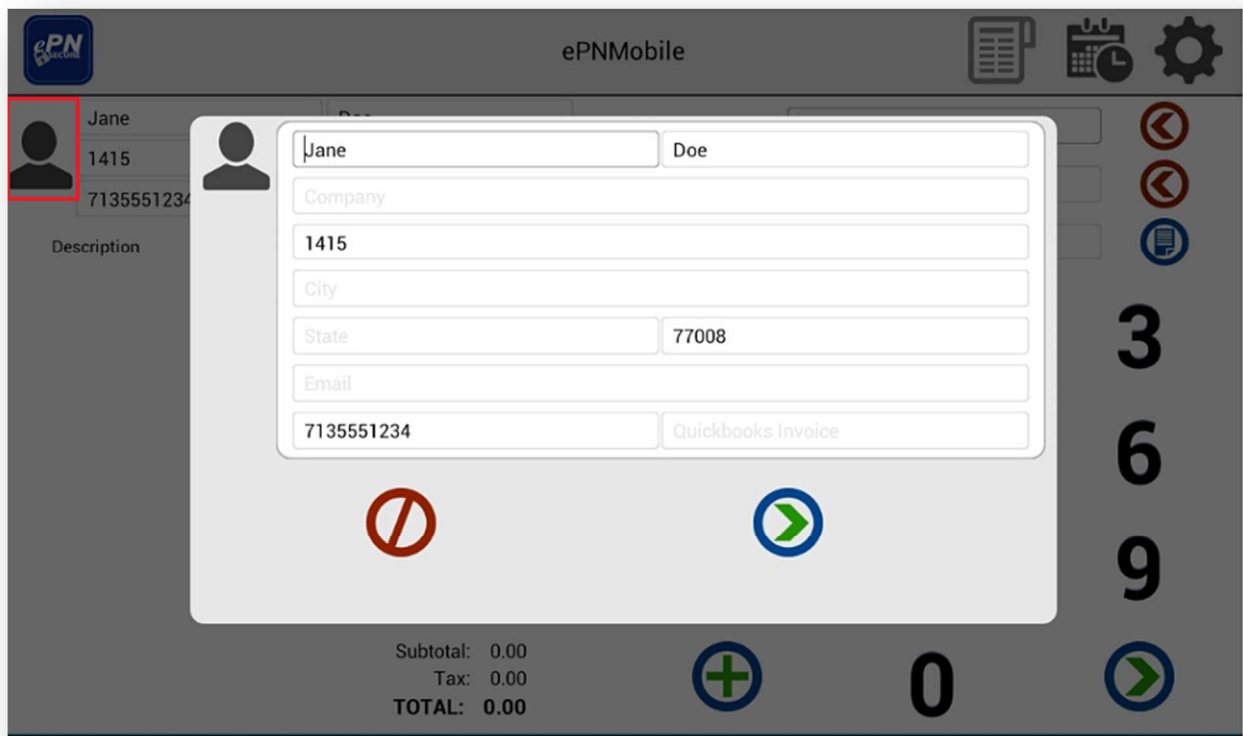
Figure 7 – Customer Icon (red box) & Additional Customer Information.

3. Once finished entering the order data and customer information, tap the ⊘ button to move to the "**Payment Screen**".

4. From the "**Payment Screen**", you may elect to accept a Credit Card, Check or Cash payment by tapping on the correct text field (Figure 8a). Please note that if your account is not enabled to accept check payments, it will not appear on this screen.
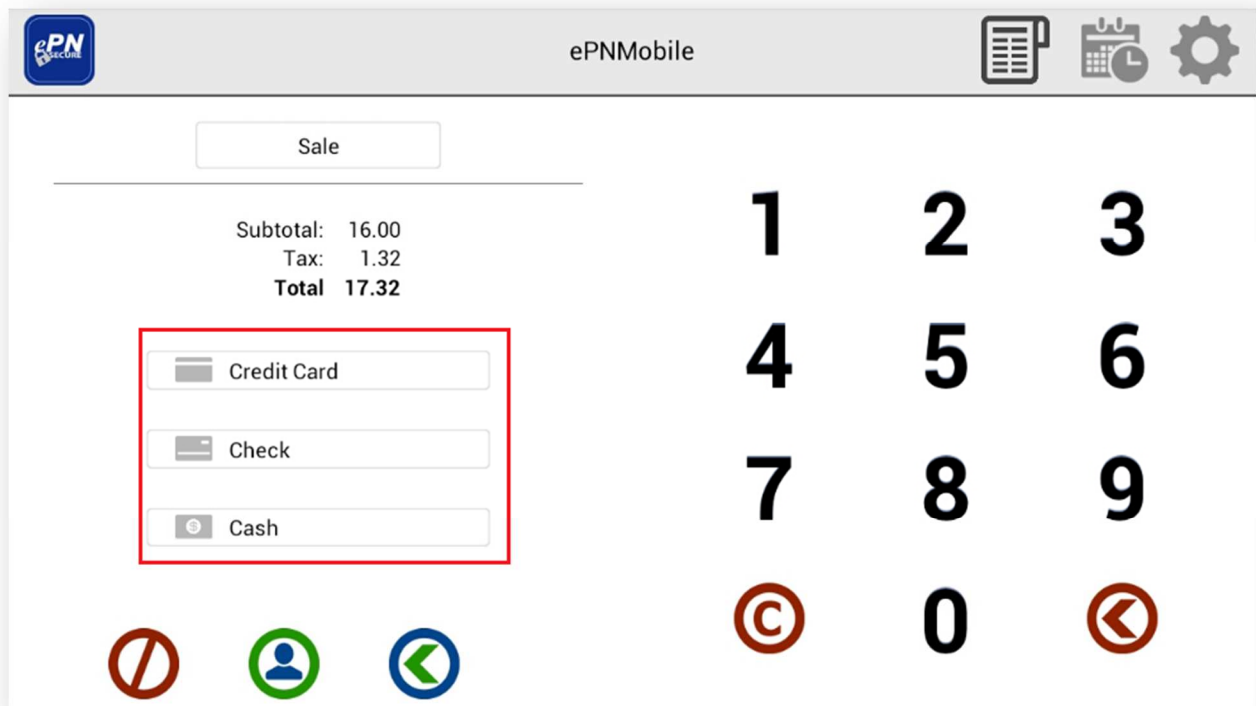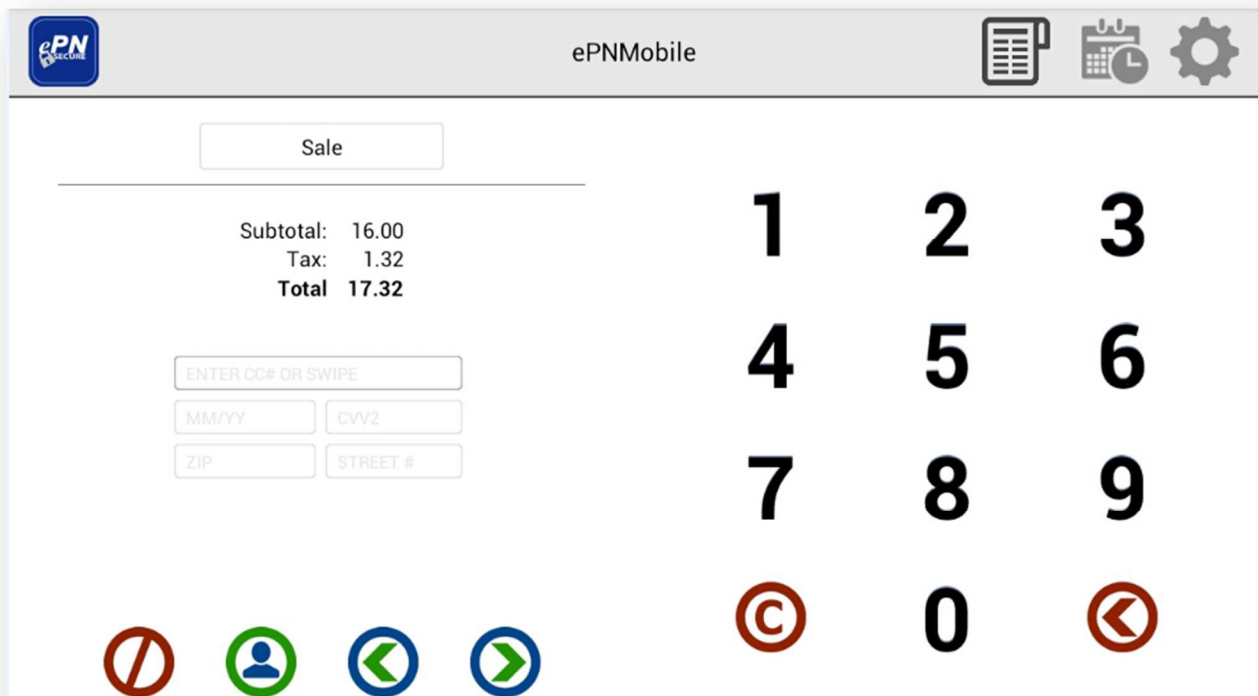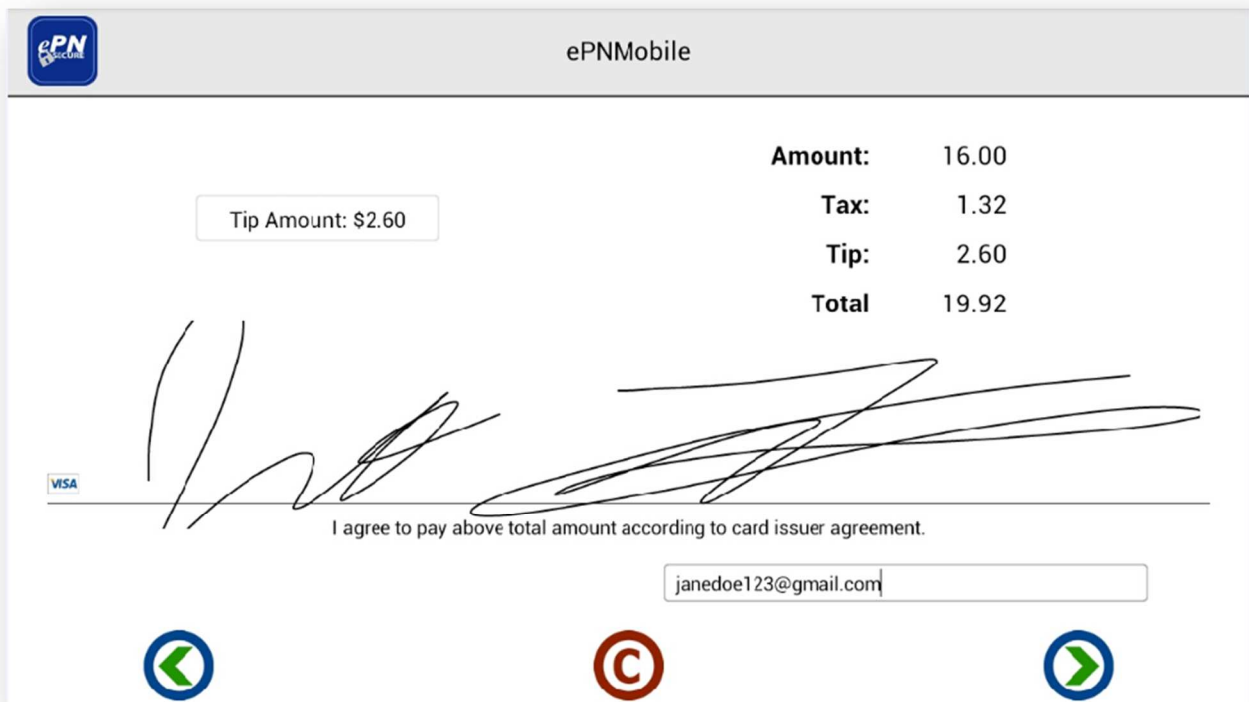
Figure 8 – Payment Screen – Tap on the payment type text field to select the payment type for the transaction

    a.   If accepting a [**Credit Card**], select and swipe the card through the readers. Otherwise you may enter the credit card information in the fields provided manually and tap (Figure 9).

Figure 9 – Payment Screen with Credit Card Selected (Clicking the red "C" clears the payment type)

      i.   On the next screen (Signature Screen – Figure 10), the cardholder may enter a tip percentage or custom tip amount and sign on the screen. The card holder can also enter their email address to receive a receipt by email. When finished they can tap

Figure 10 – Signature Screen with 15% Tip

b. If accepting a [**Check**] payment, enter the appropriate information and tap "**Next**". Follow the prompts on the screen, which will vary depending on which Check Processor you are using. One finished, submit the transaction, and it will provide the response on the final screen.

c. For [**Cash**] payments, enter an amount equal to or greater than the total. Currently, *e*PNMobile does not support multiple payment types simultaneously. This will submit the transaction and provide the response on the next screen, with the appropriate change – if applicable.

5. After the transaction is submitted, the results are displayed on the screen (Figure 11).
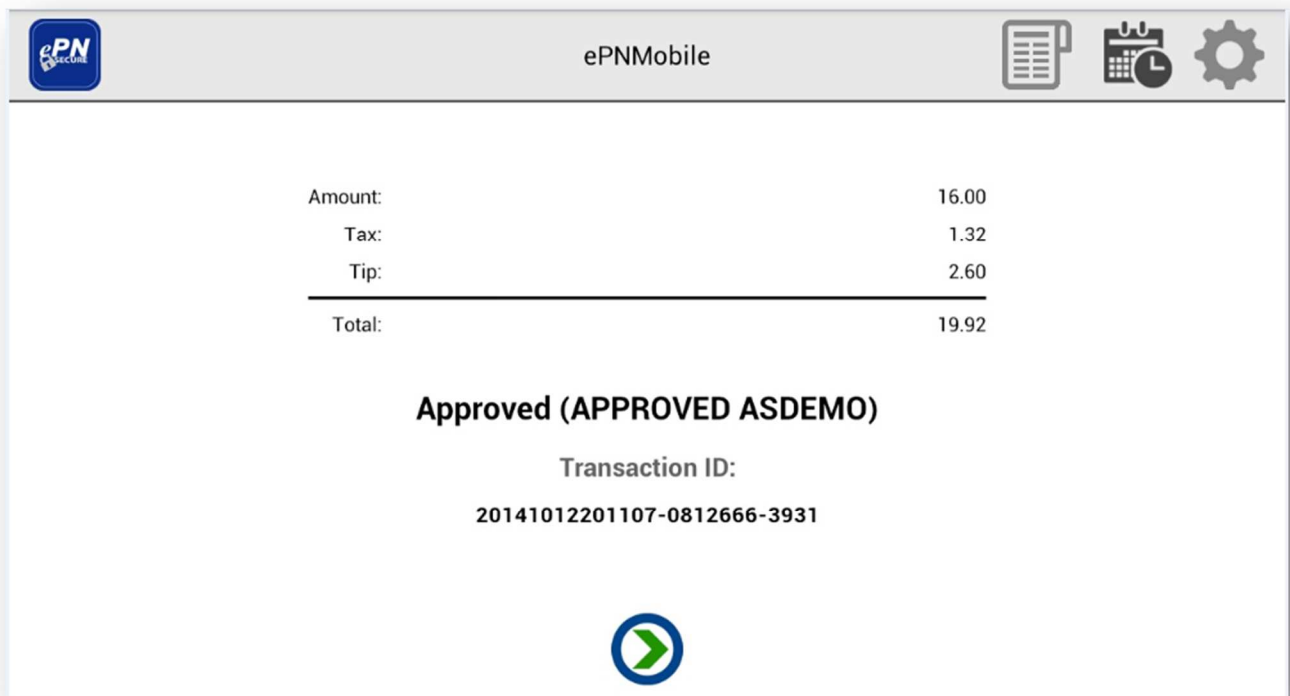
Figure 11 – Transaction Results Screen.

Making an Inventory Sale

The following instructions are intended for merchants who will be using *e*PNMobile with the optional *e*PNInventory service enabled. You must have "**Order Builder**" option enabled during the Terminal Setup (Figure 3).

Upon activating your terminal with the "Order Builder" enabled, you will see the screen depicted on **Figure 12** – it will show the items you have entered in *e*PNInventory on your gateway account.
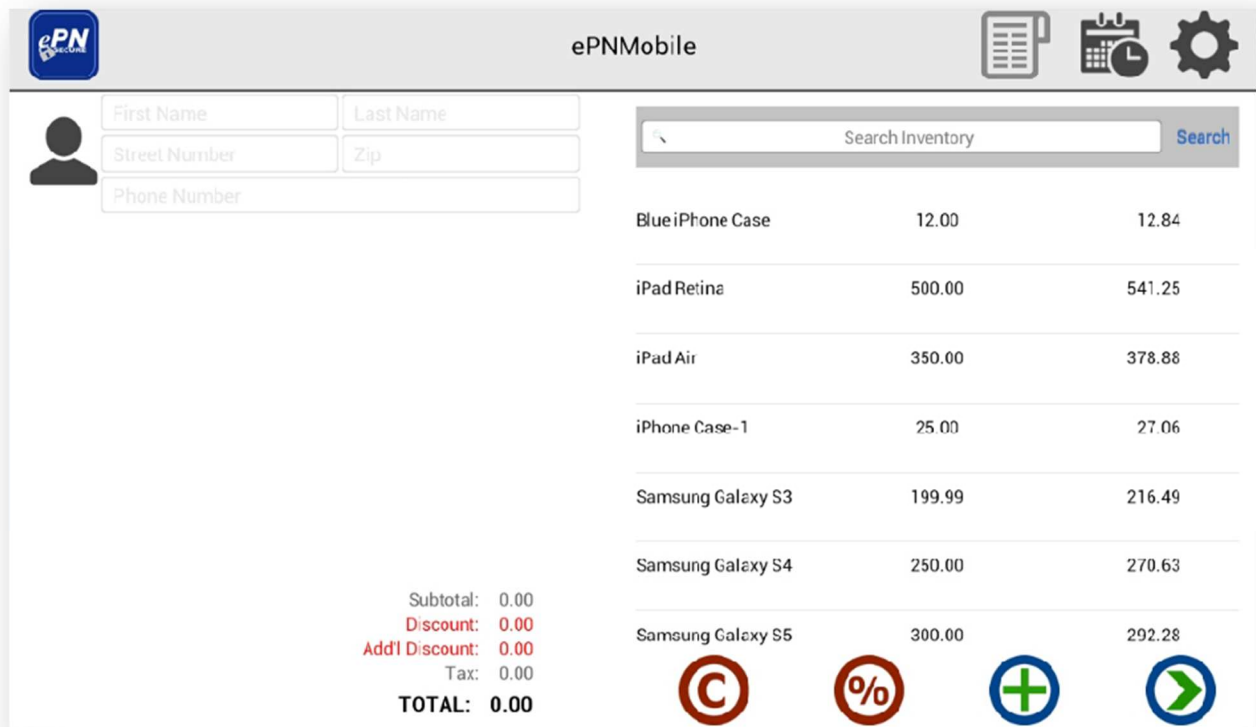
Figure 12 – Inventory Sales Screen.

Note: if you do not see a similar screen, please make sure you check the following:

1. Ensure you have products in your online inventory database by logging into your gateway account and selecting "*e*PNInventory" from the drop down menu.

2. Double check that you have followed the directions in the **"Activating your account"** section of this document and that **"Order Builder"** is enabled (Figure 3).

To initiate an inventory sale:

1. Tap on the items you are going to sell one at a time. They will begin to be listed on the itemization table on the left hand side of the screen (Figure 13).

   a. If you would like to delete items from the itemization table, you can swipe left to reveal the "Delete" button as noted on Figure 13.

Figure 13 – Inventory Sales Screen with Deleted Item Swiped to the Left.

b. Tapping on the items already on the itemization table will allow you to edit the price, edit/add an item specific discount, or tax – as shown on Figure 14.
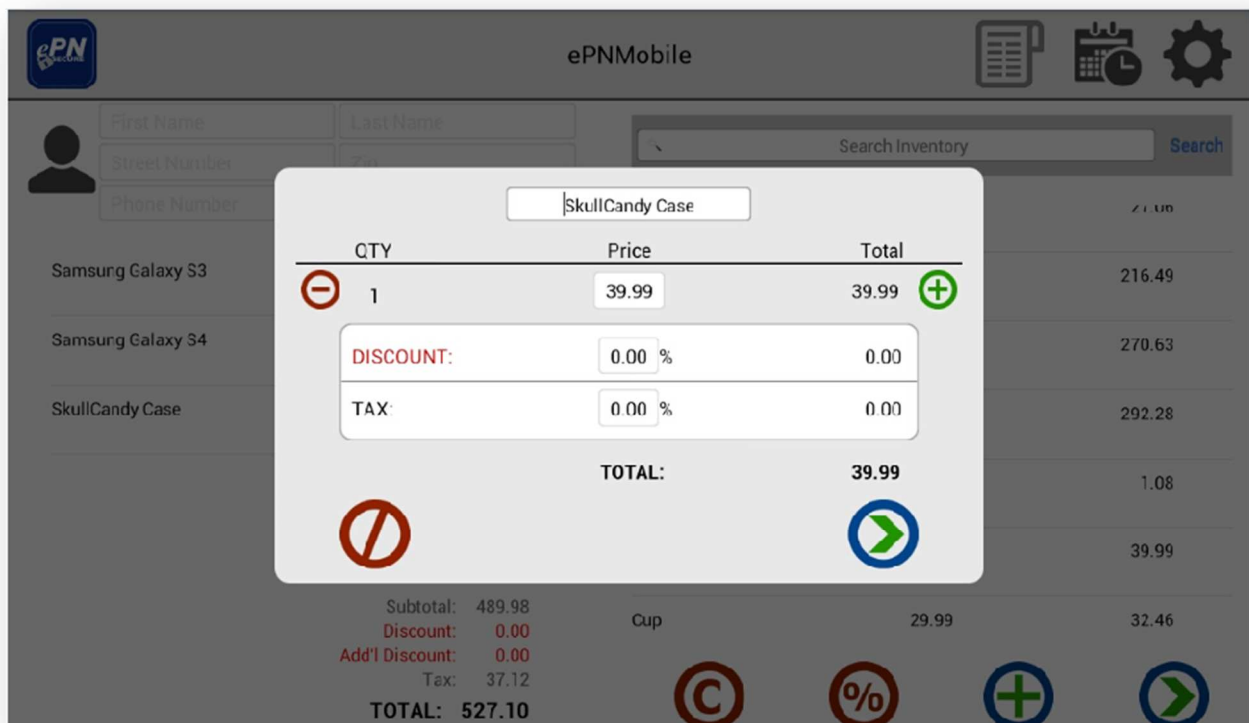
Figure 14 – Editing Items Screen.

2. Apply discounts, if applicable, to the entire sale by tapping on the % button on the bottom right of the screen (Figure 15). Remember, this button applies a discount to potentially ALL items.
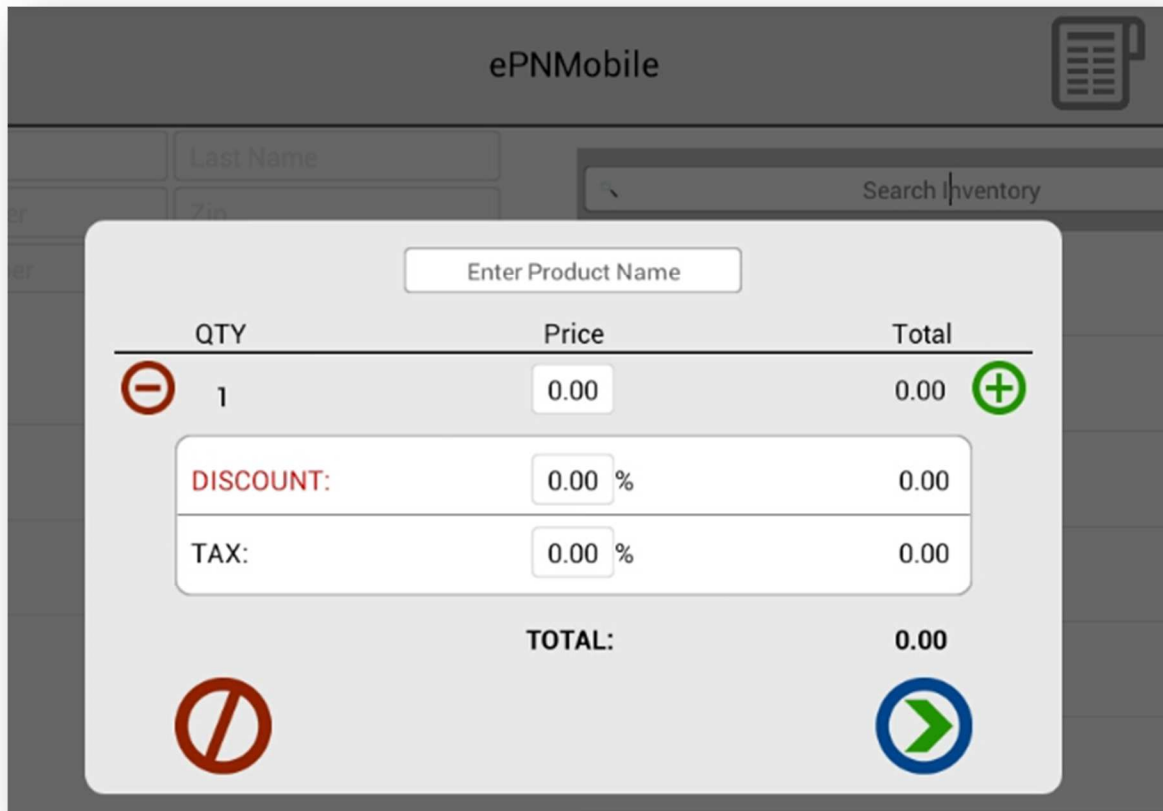

Figure 15 – Add Discount Button

a. When the % button is tapped, a dialog (Figure 16) appears with several options:

i. **Percent**: tap the percent button if you would like to apply a percentage discount to all items.

ii. **Amount**: discounts exactly the amount entered from the total of the sale (for example if someone has a $10 off coupon).

iii. **Exclude Discounted Items**: by enabling this checkbox we will <u>NOT</u> apply the discount percentage to items that are already discounted.

Figure 16 – Discount Dialog.
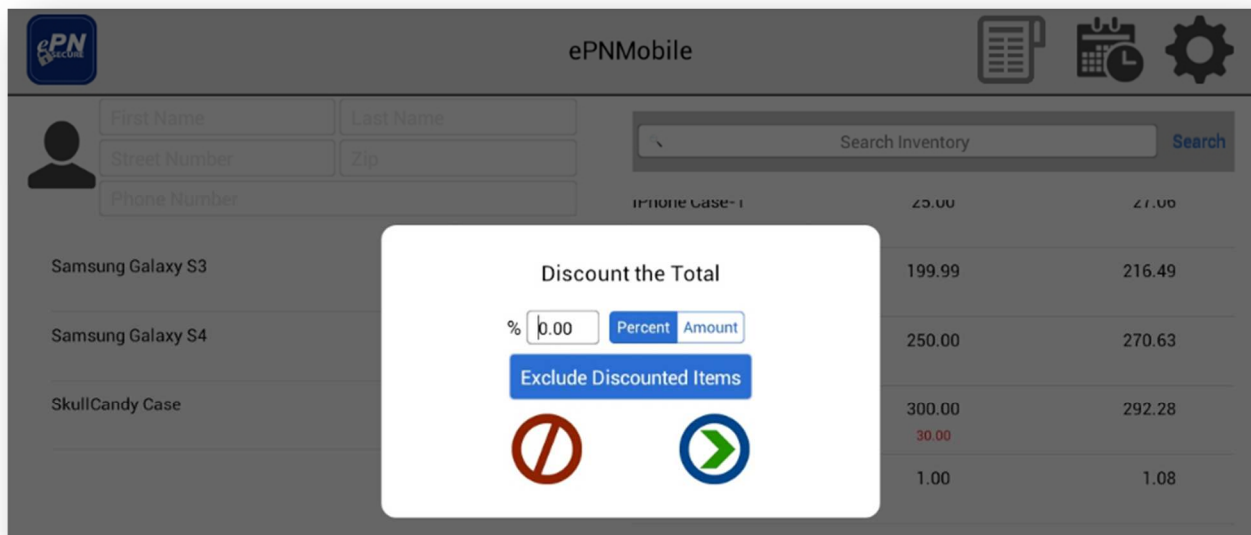
3. You may add Non-Inventory items on the fly by tapping on this: button. Fill in the dialog on Figure 17 and then tap "Save". NOTE: This does NOT add the item to the master inventory database online; it only adds it to this specific order.

Figure 17 – New Inventory Item Dialog.

4. Fill in as much of the customer information on the top left hand corner as possible. Also note that you may fill in additional information by tapping the **"Customer Icon"** (Figure 18), including the QuickBooks® invoice number, if you use that accounting software and *e*PNPlugIn.
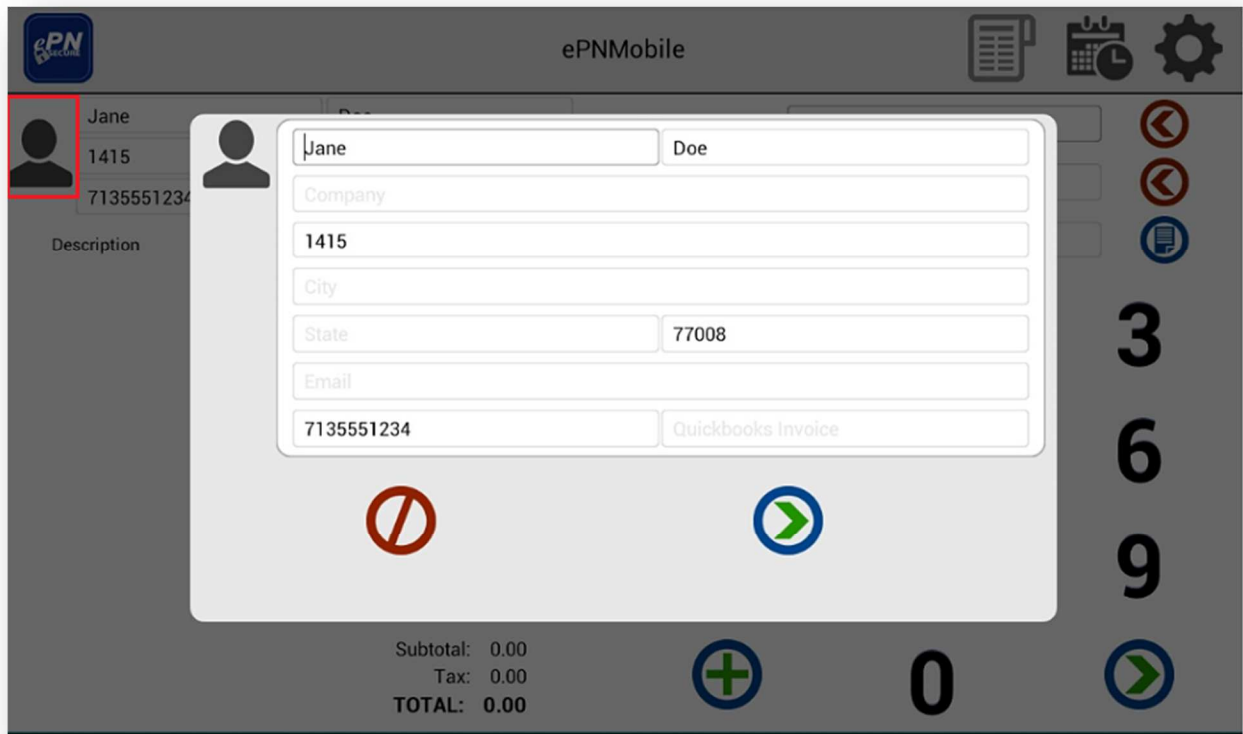
Figure 18 – Customer Icon (red box) & Additional Customer Information.

5. Once finished entering the order data and customer information, tap the arrow button to move to the **"Payment Screen"**.
6. From the **"Payment Screen"**, you may elect to accept a Credit Card, Check or Cash payment. Please note that if your account is not enabled to accept check payments, it will not appear on this screen.
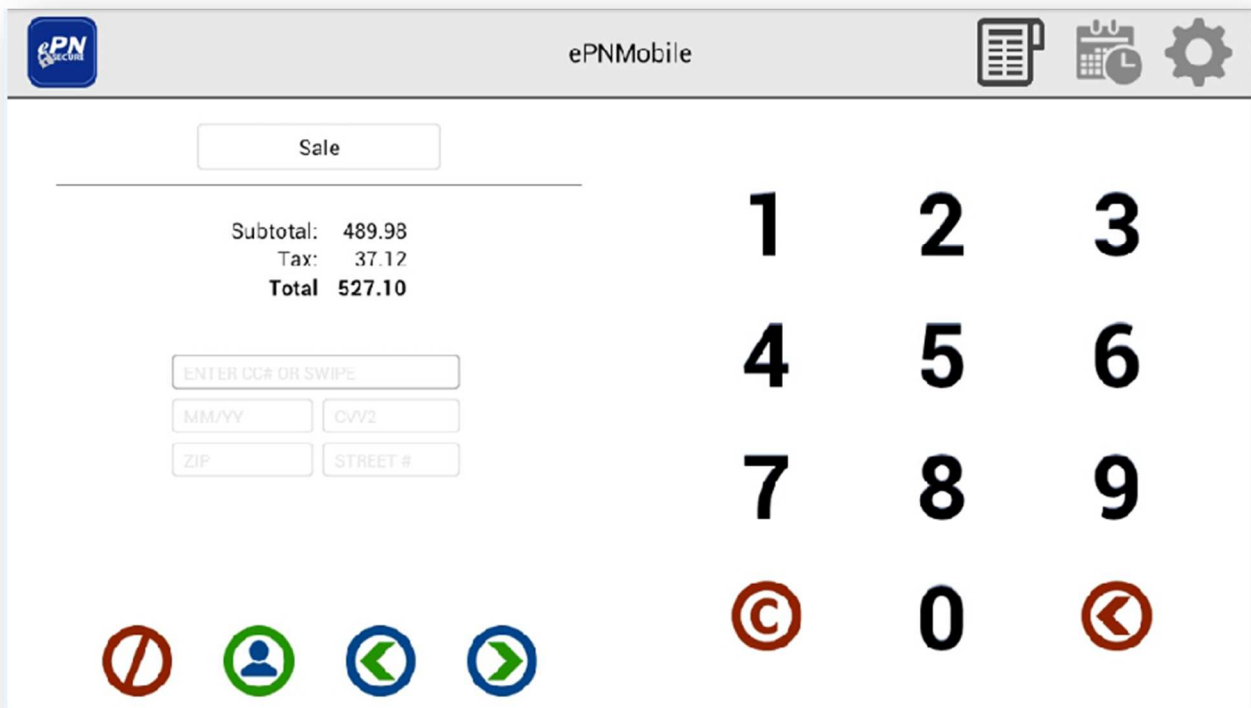
Figure19 – Payment Screen with Credit Card Selected (Clicking the red "C" clears the payment type)

    a. If accepting a [**Credit Card**], select and swipe the card through the credit card reader. Otherwise you may enter the credit card information in the

      fields provided manually and tap (Figure 19).

        i. On the next screen (Signature Screen – Figure 20), the cardholder may enter a tip percentage or custom tip amount and sign on the screen. The cardholder can also enter an email address to receive a

            receipt. When finished they (or you) can tap .
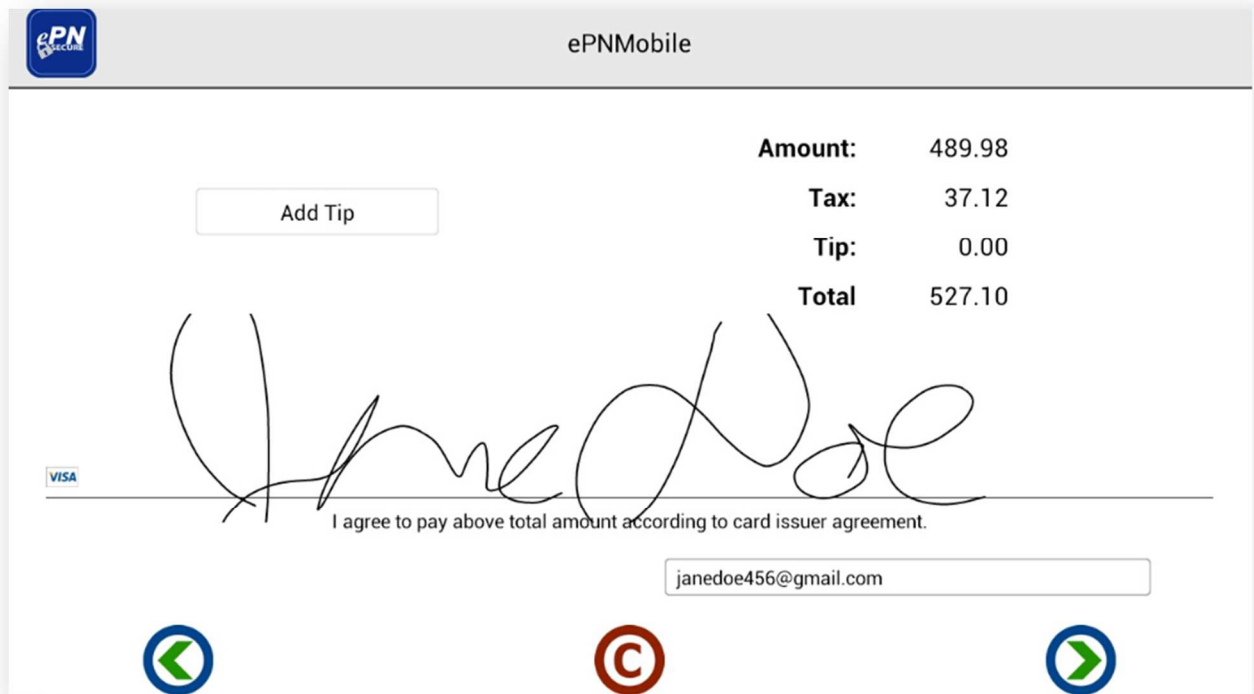
Figure 20 – Signature Screen.

    b. If accepting a [**Check**] payment, enter the appropriate information and tap

 . This will submit the transaction and will provide the response on the next screen.

    c. For [**Cash**] payments, enter an amount equal to or greater than the total. Currently, *e*PNMobile does not support multiple payment types simultaneously. This will submit the transaction and provide the response on the next screen, with the appropriate change – if applicable.

7. After the transaction is submitted, the results are displayed on the screen (Figure 21).

Figure 21 – Transaction Results Screen.

Voiding a Sale

Voiding a sale is performed when a cardholder would like to return the product or service provided. A void is performed usually on the same date that the transaction was processed or prior to the batch settlement date/time.

To void a sale:

1. Tap on the "Transaction Activity" icon -

2. This will load the current batch transactions on the left hand side of the screen (Figure 22).

3. The swipe left gesture on the line item you wish to void will reveal the "Void" button (Figure 23).

Figure 22 – Current batch Screen.
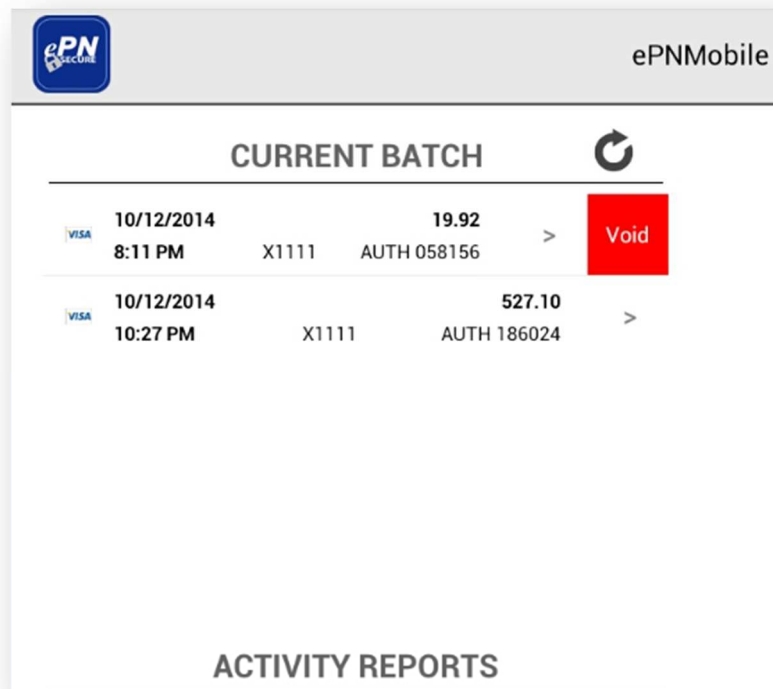
Figure 23 – Swipe Left to Void a Sale

4. Tapping the "**Void**" will nullify the sale and complete the process (Figure 23).

5. Before the transaction is voided you have the option to enter the card holder's email address so they may receive a receipt (Figure 24).

Figure 24 – Customer email Screen.
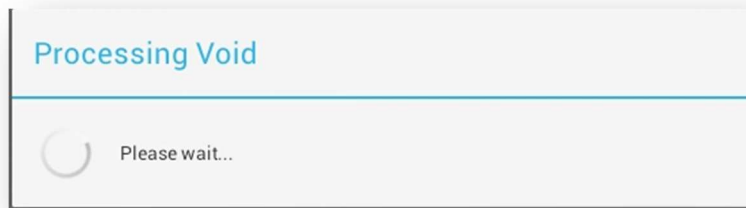
Figure 25 – Processing Void.
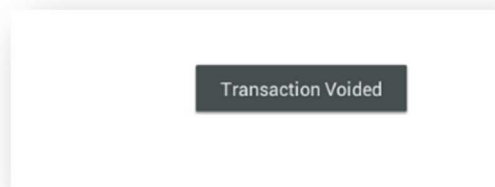
Figure 26 – Transaction Void Confirmation.

Refunds from Transaction Activity

Refunds are performed when a cardholder would like to return the product or service provided. A **"Refund"** or **"Return"** is only performed AFTER a batch has settled – usually it is NOT the same date the purchase was made.

To perform a Refund:

1. Tap on the **"Transaction Activity"** icon -

2. At the bottom left, select the date range of when the original transaction was performed and tap (Figure 27).

Figure 27 – Entering a date Range to Look up History

3. Once the transactions are loaded, swipe left on the transaction you wish to refund to reveal the **"Return"** button and tap it to finish the transaction. Before the transaction is processed, you have the option to enter an email address to email a receipt (Figure 28a-28d).

Figure 28a – Swipe Left on the Transaction and Tap "Return" to Finnish the refund.

Figure 28b – Email entry for receipt.
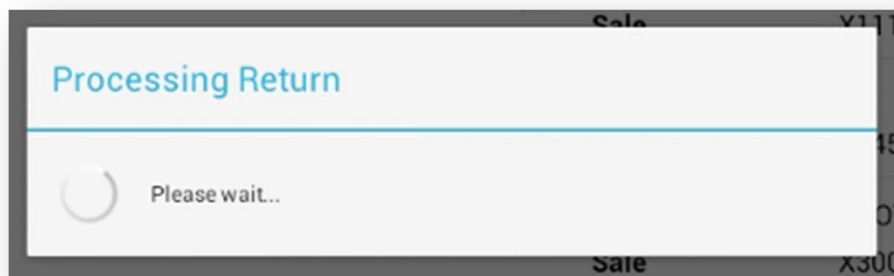
Figure 28c – Processing Return.

Figure 28d – Transaction Refunded.

Card Present Refunds

In addition to performing refunds from the Transaction History screen, you may perform refunds from the main screen. This is done if the cardholder has their credit card present with which they made the original purchase.

To refund a cardholder for a previous purchase:

1. Enter the items/service(s) being returned and tap ⊗ (Figure 27). NOTE: you may also just enter the amount of the refund, without itemizing.

Figure 29 – Enter items Returned.

2. Tap the "Sale" button, which will now change into the "Return/Refund" button (Figure 28).
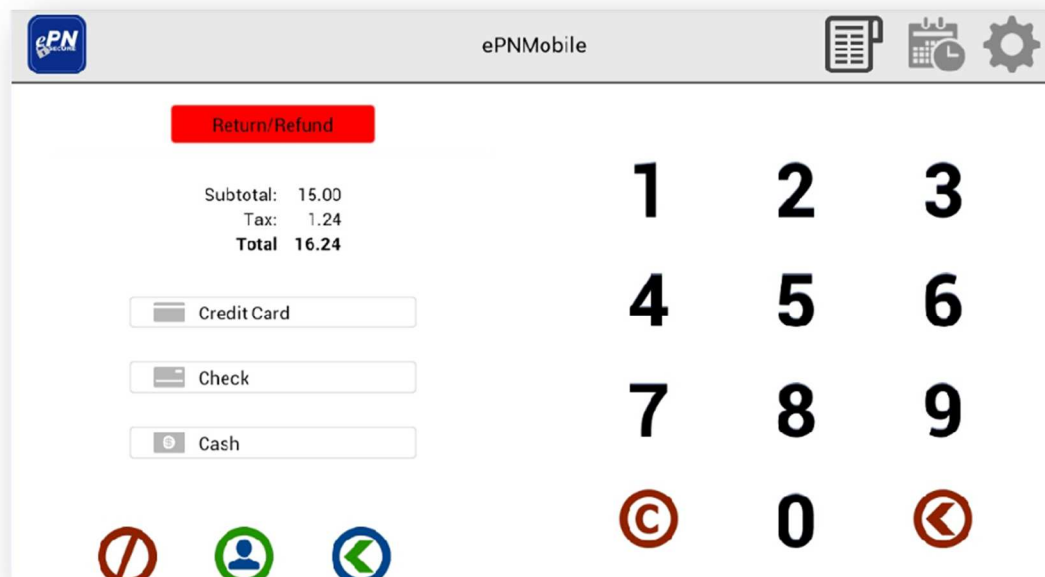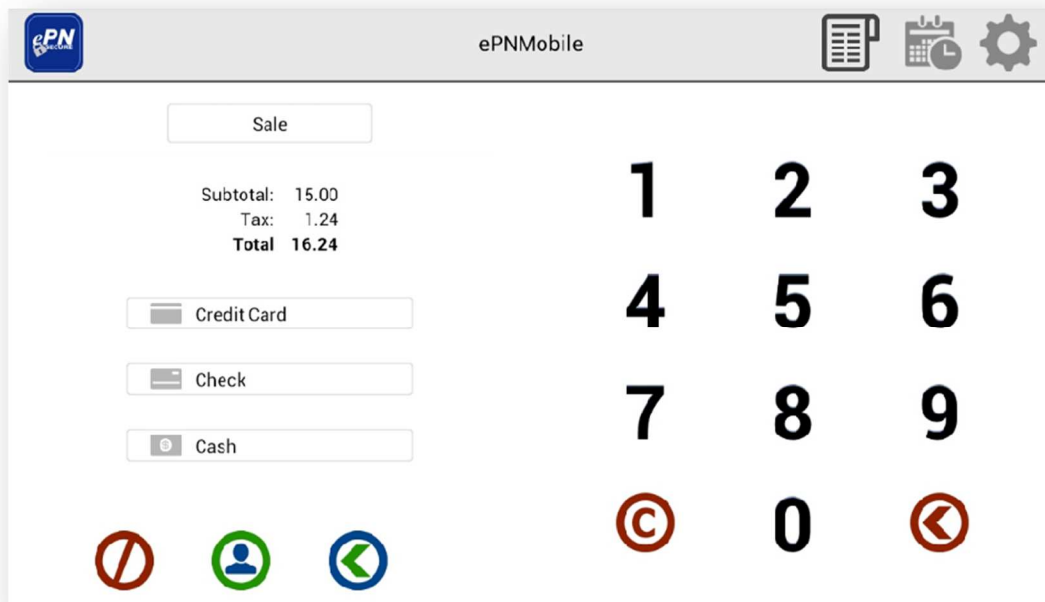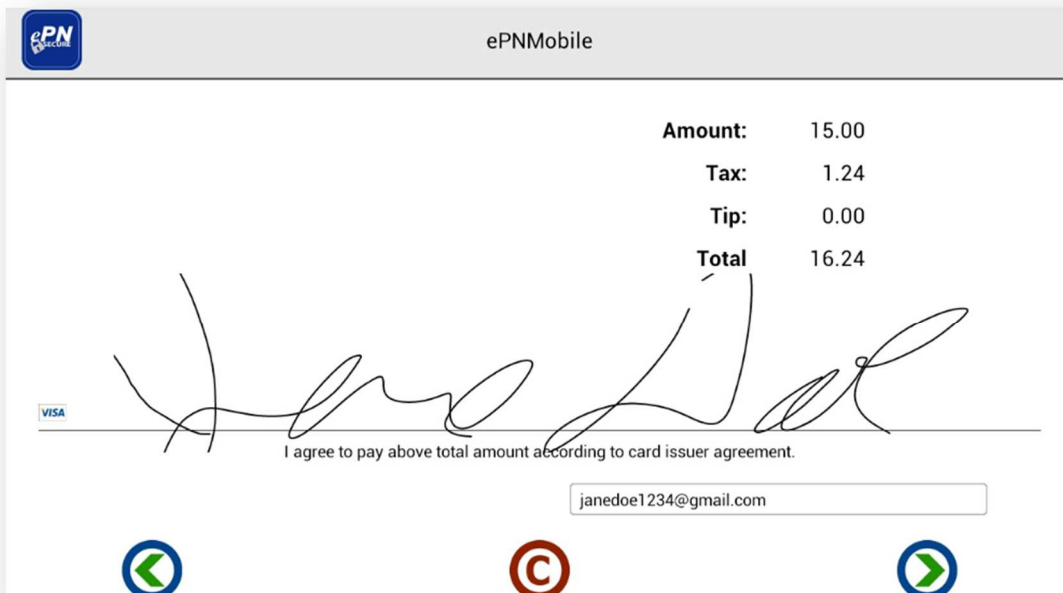
Figure 30 – Sale Tapped to Return Button.

3. Select the method of payment that was used for the original transaction:

a. If accepting a [Credit Card], select and swipe the card through the readers. Otherwise you may enter the credit card information in the fields provided manually and tap (Figure 30).

   i. On the next screen (Signature Screen – Figure 31), the cardholder may enter their email address for a receipt and sign for the transaction. When the cardholder is finished they can tap .


Amount:	15.00
Tax:	1.24
Tip:	0.00
Total	16.24

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

janedoe1234@gmail.com

Figure 31 – Signature Screen for Return Transaction.

b. Refunding a [**Check**] is not supported in *e*PNMobile.

c. For [**Cash**] refunds, enter the amount and Submit.

4. After the transaction is submitted, the results are displayed on the screen (Figure 32).
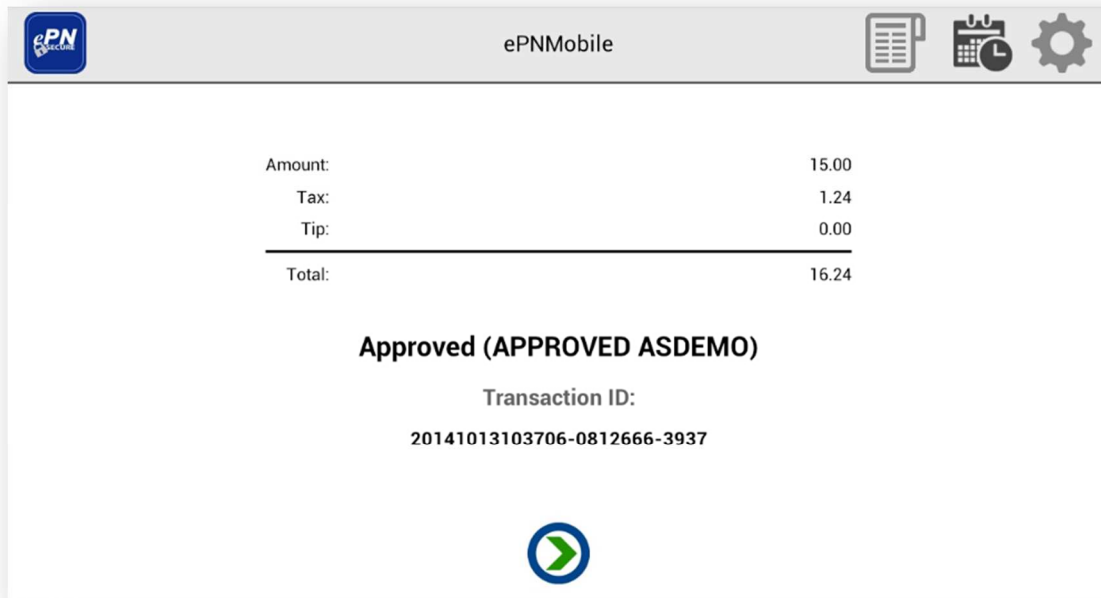
Figure 32 – Transaction Approval Screen.

Document Change Log

10/13/2014 – Initial document completed.