*e*PNMobile iPhone v. 3.1.36

User Reference Guide

eProcessing Network, LLC
3/31/2015

*e*PNMobile iPhone v.3.1.36

User Reference Guide

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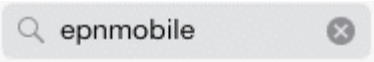
Overview

- *e*PNMobile, from *e*ProcessingNetwork, 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 *e*ProcessingNetwork account is required.
- An iPhone is required.
- *e*PNMobile license(s) and/or account.

Downloading *e*PNMobile

1. From your iPhone, tap on the App Store icon: 
2. Type "ePNMobile" in the app search box: 

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

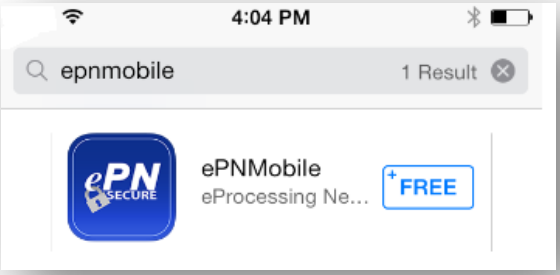


Figure 1 - The *e*PNMobile app.

4. Tap the "FREE" button to download.

Activating Your Account

To activate your account, follow these steps:

1. Find and tap the *e*PNMobile icon on your iPhone (Figure 2).

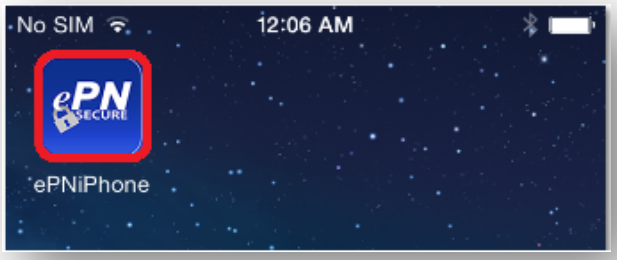


Figure 2- *e*PN Mobile Icon.

2. This brings you to the "*e*PNMobile Entry Screen" (Figure 3), where you can either "Test Drive" the app (no real transactions will take place) or "Apply for an Account," which should only be done if you have no current merchant service provider.
3. Tap on "Activate my Account" (Figure 3).

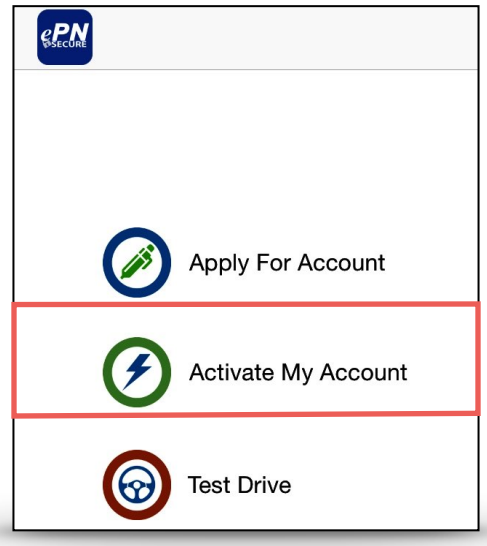


Figure 3 – Activate Account.

4. Enter your Terminal ID or your *e*PN Account Number (also known as your Gateway ID) and Online Password, and tap "Activate My Account" (Figure 3a).

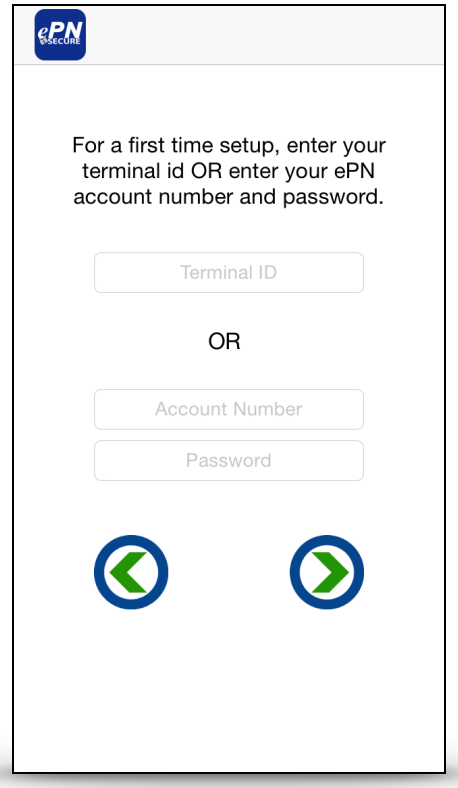


Figure 3a – *e*PNMobile Login Screen.

5. At the "Terminal Configuration Screen" (Figure 4), enter a terminal "Name", which will help find the iPhone 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 service provider.
   e. Allow Cash – enables the terminal to accept cash sales.
   f. Use OrderBuilder – 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.

6. Once all settings are configured as you desire, tap  .

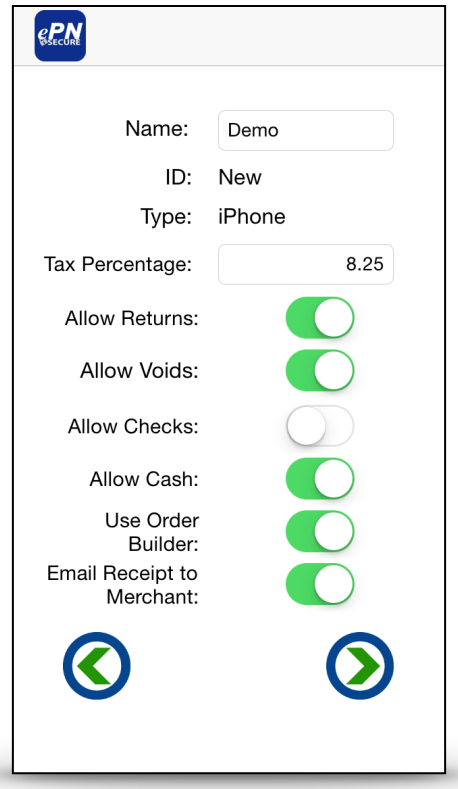


Figure 4 – Terminal Configuration Screen.

7. At the "Settings Screen" (Figure 5), 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 tap  .
   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 tap this button  .
   c. **Upload Logs** – only tap this button,  , if requested by our Support Department. This is only for troubleshooting.
   d. **Reactivate My Account** – this button,  , takes you back to the "*e*PNMobile Entry Screen" where you can choose "Activate My Account" and change terminal settings.
   e. **Terminal Settings** - This button,  , allows you to update your terminal settings (such as allow returns, voids, checks and cash, Use Order Builder and Email Receipt to merchant).
   f. **Continue** – only tap this button,  , when you have confirmed all settings are correct and are ready to use ePNMobile for sales.

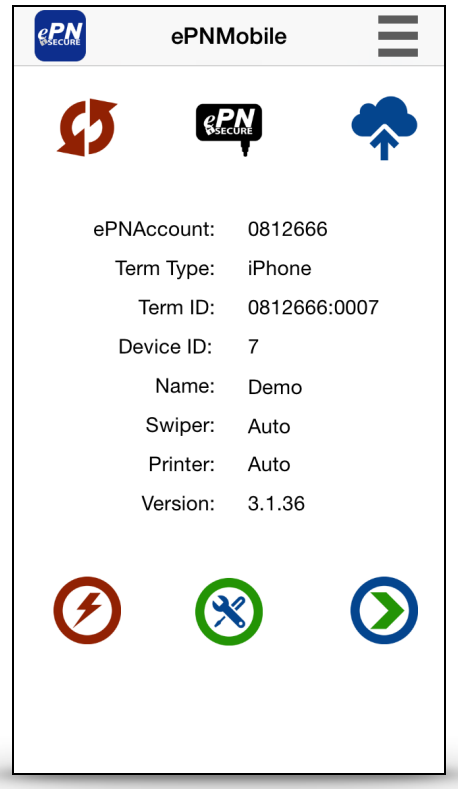


Figure 5 – Settings Screen.

Making a Sale - Single or Multiple Items

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

To process a sale, follow these steps:

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

    a. If you want to store descriptions for future use, tap to the right of the "Description" field. This function allows you to store up to 10 frequently-used descriptions for future use. To access your saved descriptions, tap . To add a new description to your list, tap on the located on bottom of the screen.

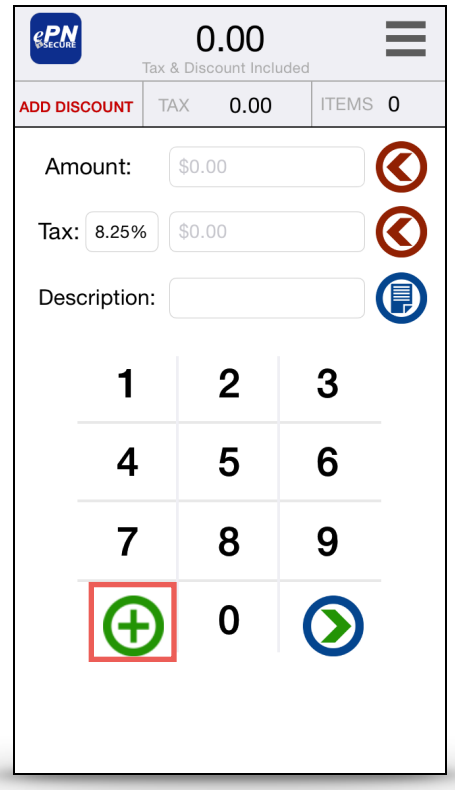


Figure 6 - Sales Screen with 8.25% sales tax set in terminal settings ("Add Items" button is in red).

b. Note that you can add multiple items to a sale by:

i. Filling out the "Amount", "Tax" and "Description" fields.

- Once these three fields are complete, tap on the bottom left-hand corner of the screen as shown in Figure 6. Your item(s) will be added to your Item Count (Figure 6a). To add additional items to your sale, complete the "Amount", "Tax" and "Description" fields and tap .

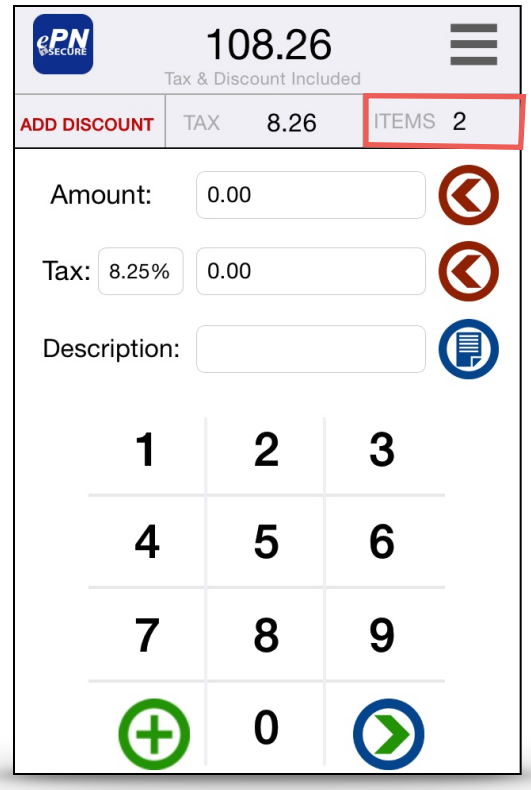


Figure 6a - Sales Screen with multiple items in sale. Items count is in red.

ii. Repeat these steps as many times as necessary.

iii. To add a discount to the total amount, tap the "Add Discount" button on the top left-hand corner of the screen. You can add a discount either as a percentage or a dollar amount. To change the discount amount from a percentage to a dollar amount, tap the "DISC% "button until it turns red with "DISC$". Once a discount is entered, the discounted amount will show in the "Add Discount" field.

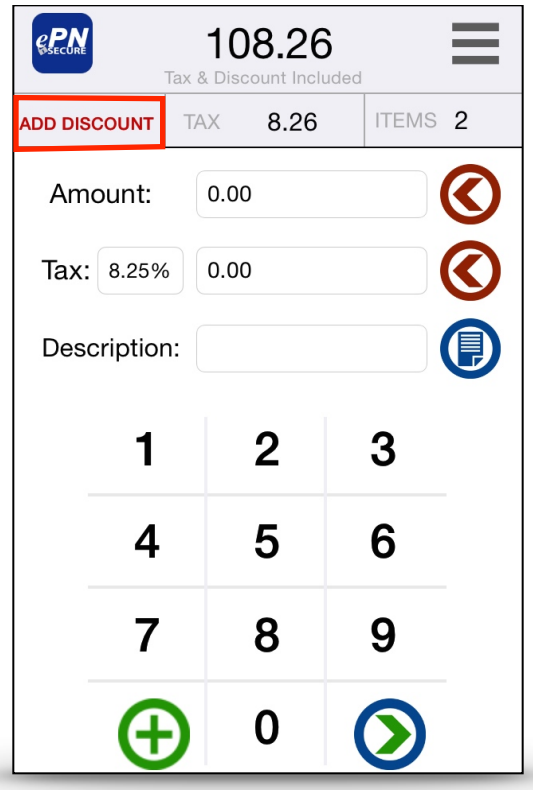


Figure 6b - "Add Discount" button.

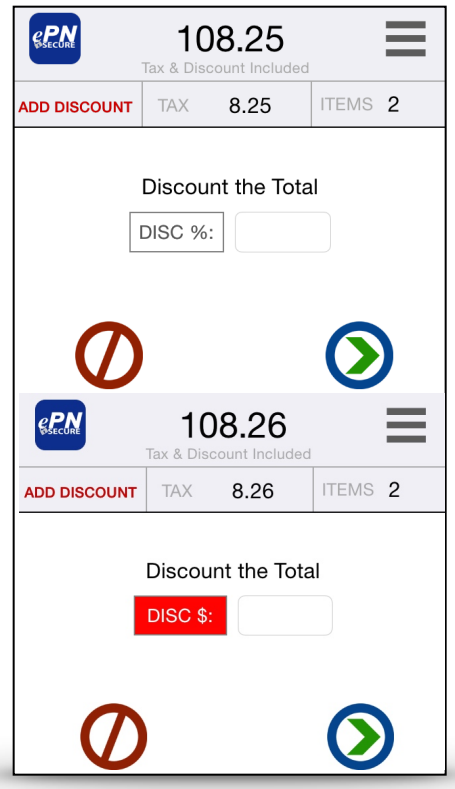


Figure 6c - Discount Screen % and $.

iv. To view a list of itemized charges, tap the "Items" button (Figure 6d). To delete item(s) from your sale, swipe the item(s) to the left to reveal a "Delete" button, as shown in Figure 6e. Tap "Delete" to remove the item(s) from your sale. Once your item list is complete, tap to go to your payment screen. To return to your terminal screen, tap . To cancel your transaction press .

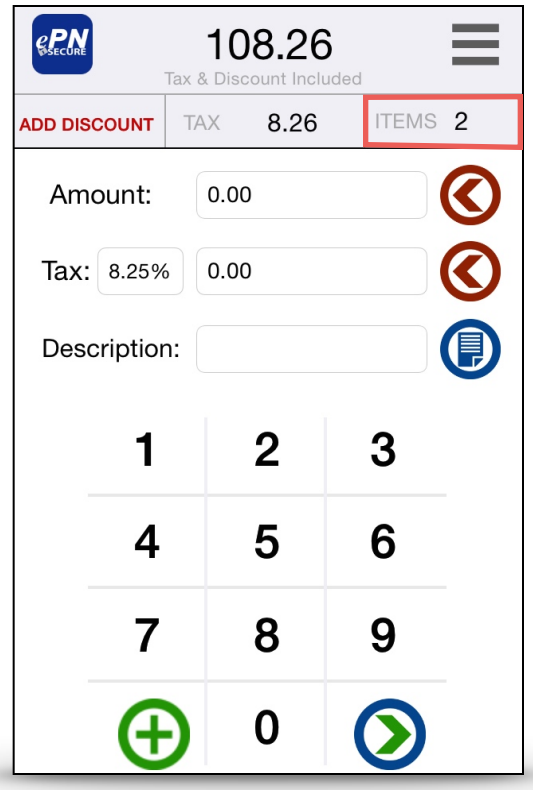


Figure 6d - Items Button in red.

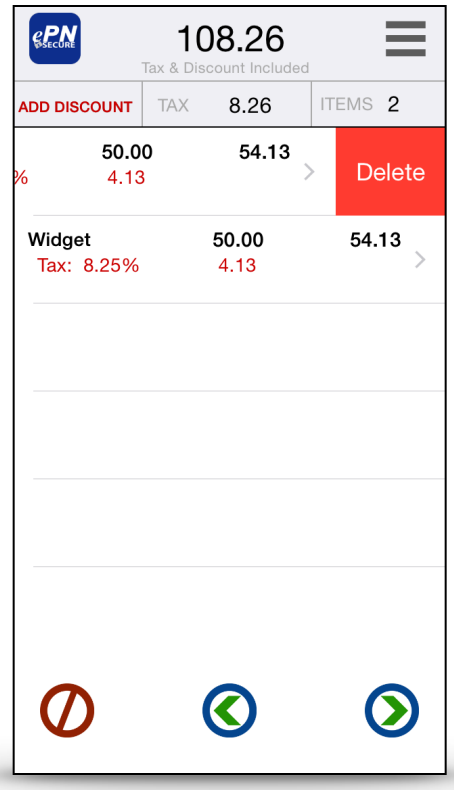


Figure 6e - "Delete" Button.

2. To add customer information to your transaction, tap the "Menu" button, , on the top right-hand corner of the screen (Figure 7). Select "Customer Info" (Figure 7b) to add as much customer information as you can. You will be able to add your customer's name, address, phone number, email address and if applicable, a QuickBooks® invoice number (Figure 7c). Once all of your information has been entered, tap to return to your transaction screen.

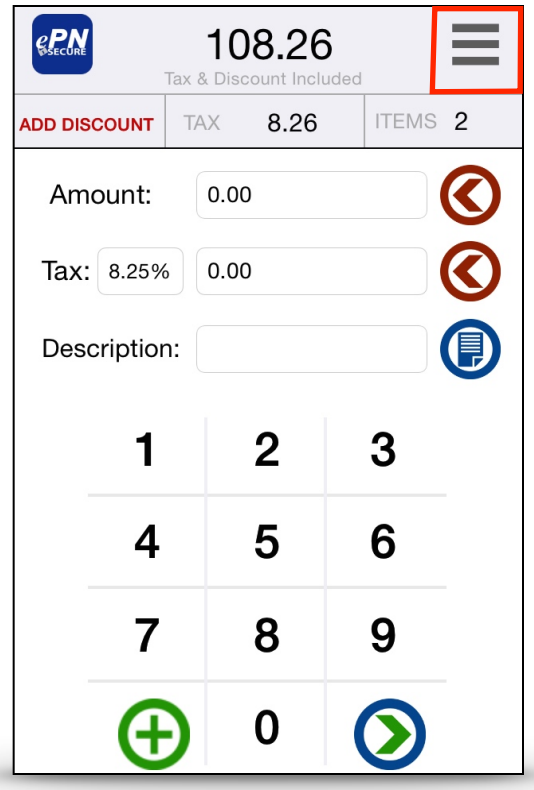


Figure 7 - "Menu" Button.

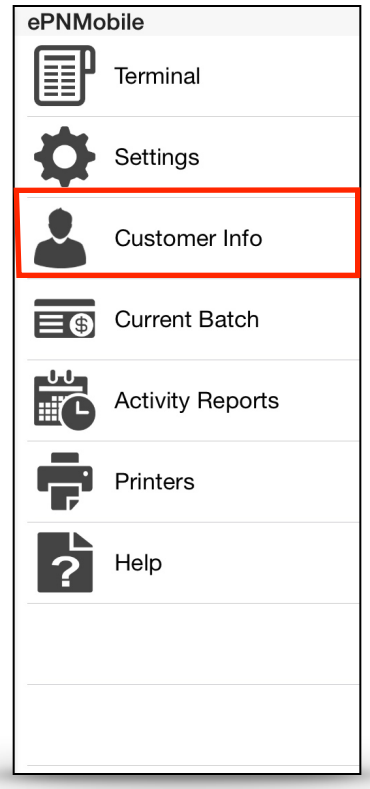


Figure 7a - Customer Info.

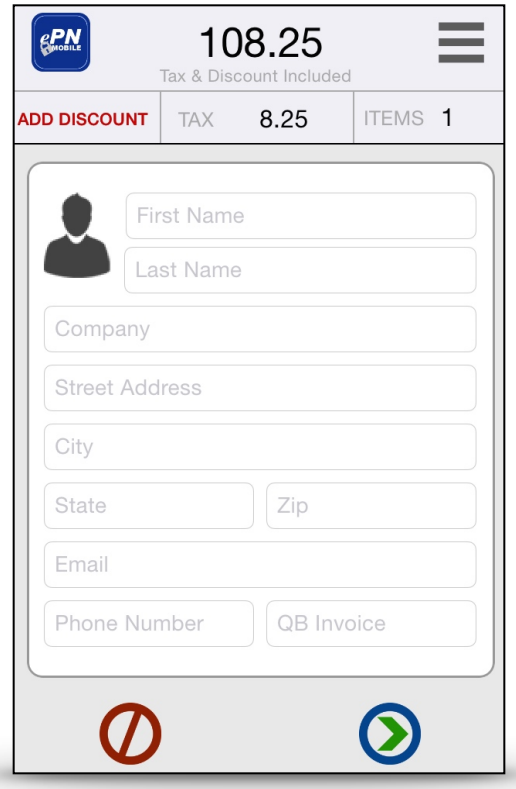


Figure 7b – Customer Information Screen.

2. Once all order data and customer information has been entered, tap  to go to the "Payment Screen" (Figure 8).

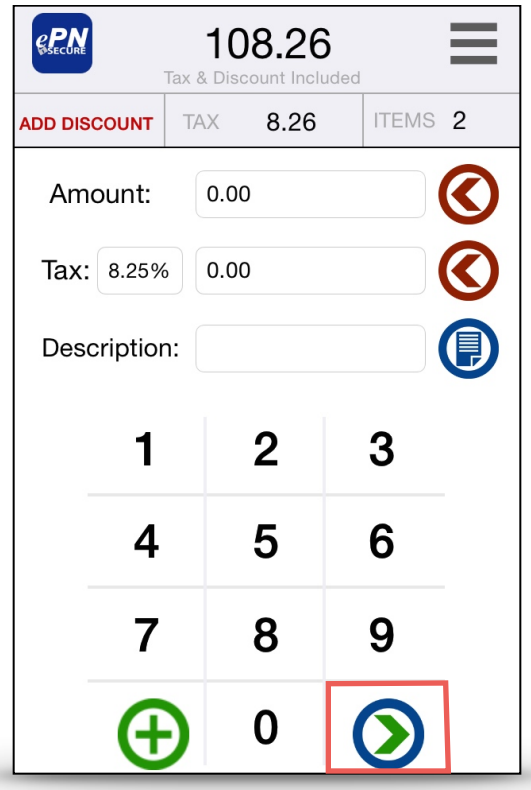


Figure 8 - Continue Button in red.

3. On the "Payment Screen", you may elect to accept a credit card, check or cash payment by tapping on the correct text field (Figure 9). Please note, if your account is not enabled to accept check payments, and/ or "AllowChecks" is not enabled in your "Terminal Configuration", checks will not be an available payment option.

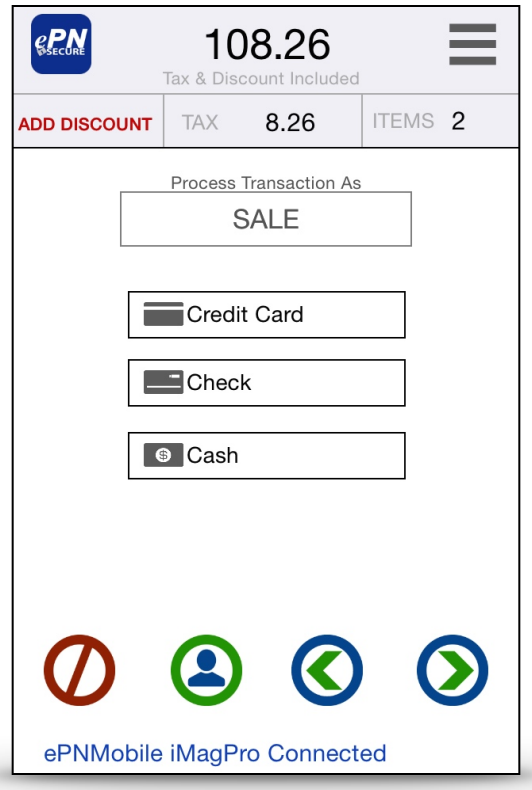


Figure 9– Payment Screen with iMagPro Reader connected.

a. If accepting a credit card, swipe the card through the card reader. To manually enter a credit card, tap the "Credit Card" button and enter all information (Figure 10a). Once the credit card is swiped or manually entered, tap  to go to the "Signature Screen".

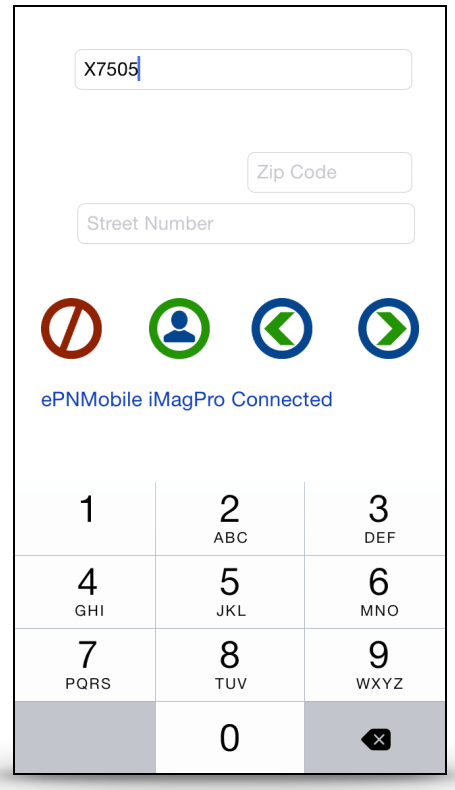


Figure 10 - Swiped Card.

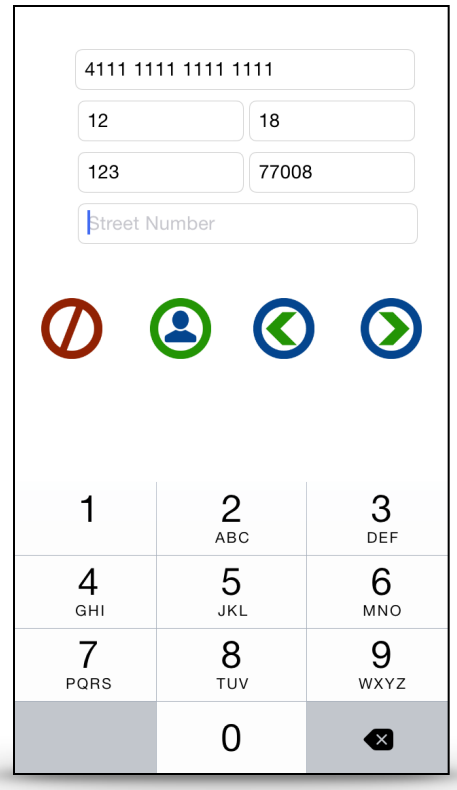


Figure 10a - Manually entered card.

b. Additional customer information may be added by tapping  . You may enter your customer's name, address, email address and Quickbooks® invoice number (Figure 10b). If you have already entered your customer's information in the "Customer Information Screen", all information entered will appear as previously entered.

i. The "Signature Screen" allows a customer to enter a tip, sign for the transaction and determine how they are to receive their receipt.

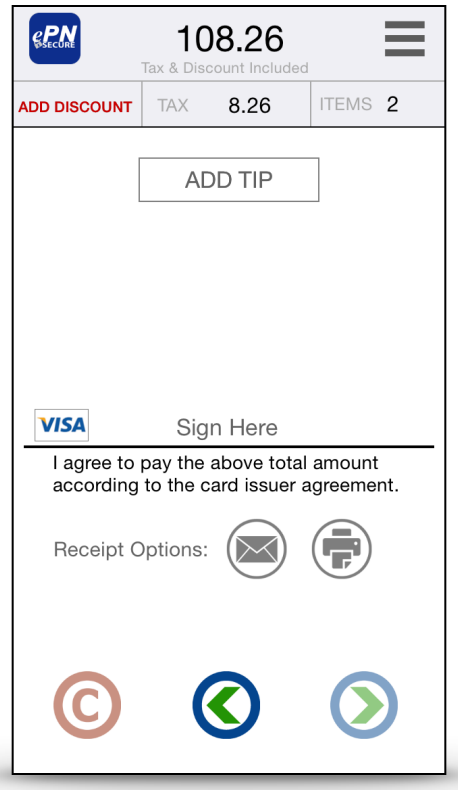


Figure 11 - Signature Screen.

ii. Customers can add a tip by tapping the "Add Tip" button. Customers can add either a custom tip amount, or choose between preset amounts of 10%, 15% or 20%. Once the tip is added, the tip amount will show in the "Add Tip" button (Figure 12). Customers may then sign for the purchase and choose how to receive their receipt.

iii. To activate a receipt option, tap on the icon of the receipt option your customer would like. The "Envelope" icon is for emailed receipts and the "Printer" icon is for printed receipts. Your customer may receive both a printed and emailed receipt if they wish. If a customer would like a receipt by email, they must enter their email address in the "Email Address" field. For printed receipts, please review the Bluetooth and WIFI Printer sections of this guide.

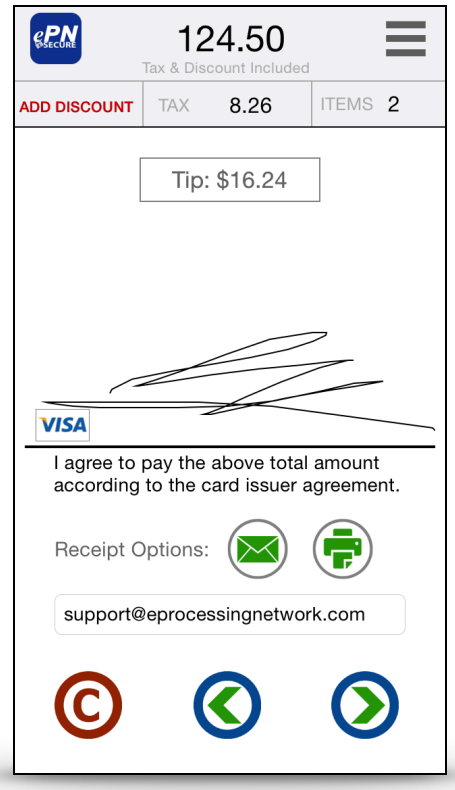


Figure 12 - Signature Screen with 15% tip, email and printed receipt.

b. If accepting a check payment, enter the appropriate information and tap (Figure 13). Follow the prompts on the screen, which will vary depending on the check processor you are using (Figure 13a). Once finished, tap to process the transaction.

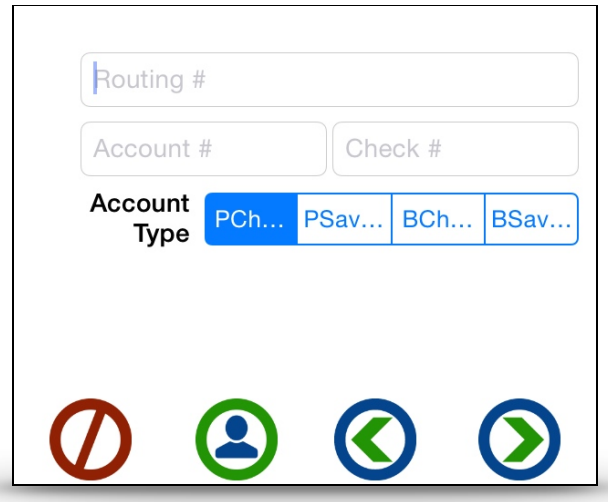


Figure 13 - Check Processing Screen.

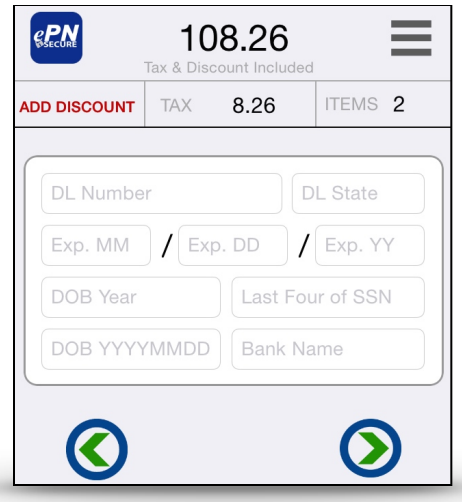


Figure 13a - ID Entry Screen.

i. For cash payments (Figure 14), enter an amount equal to, or greater than, the total. Customers may choose to receive a receipt by email or printed (if applicable). Currently, *e*PNMobile does not support multiple payment types simultaneously. To process the transaction, tap . If applicable, your change will display on the next screen along with a transaction ID.

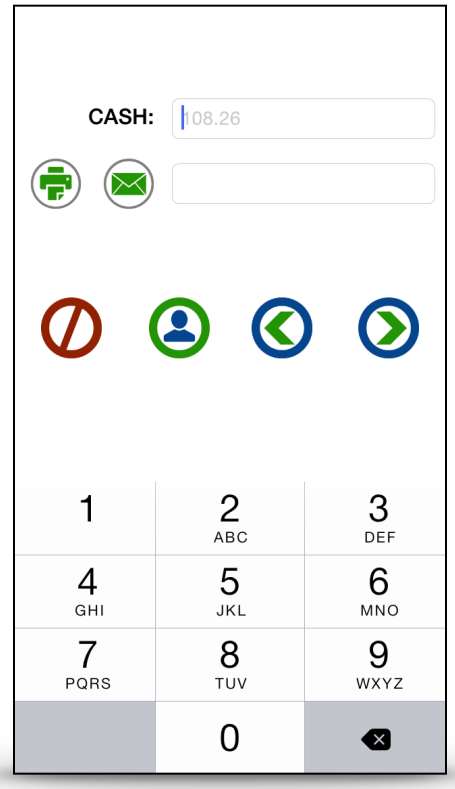


Figure 14 - Cash Sale Screen.

2. After the transaction is submitted, the results are displayed on the screen (Figure 15).

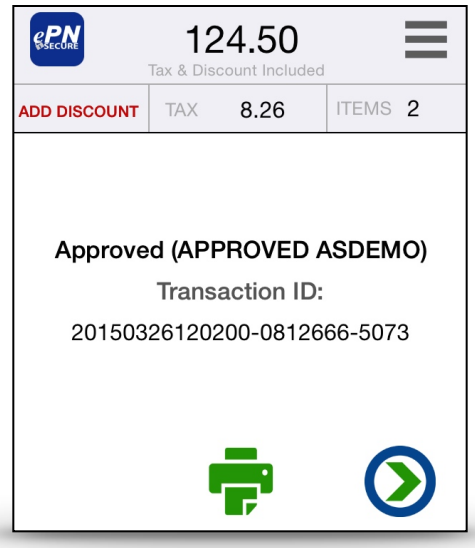


Figure 15 - Approval Screen with receipt reprint available.

Inventory Management

*e*PNMobile allows you to manage your online inventory through your *e*PNMobile application. *e*PNMobile allows you to make real-time updates to your inventory database by adding, deleting and editing your inventory items.

The following instructions are intended for merchants who are using *e*PNMobile with the optional *e*PNInventory service enabled. To access the inventory management feature through *e*PNMobile, merchants MUST have "Use Order Builder" enabled in your "Terminal Settings" (Figure 4).

To access the online inventory management:

1. Tap the "Menu" key: 
2. Tap "Inventory" from your menu list (Figure 16).

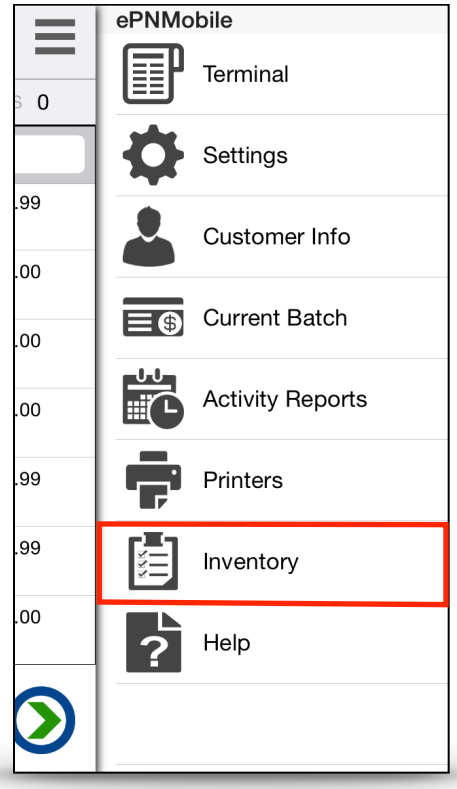


Figure 16 - Inventory selection.

3. The *e*PNInventory home screen screen will appear (Figure 17).

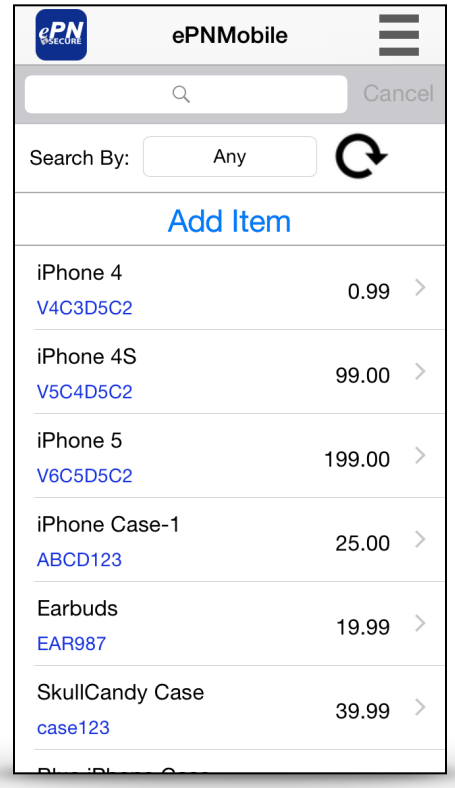


Figure 17 - Inventory home screen.

*e*PNMobile allows you to add inventory items to your *e*PNInventory database through the *e*PNMobile application for iPhone. At this time only inventory items may be added to your online inventory. To add "Categories" and "Departments", you will need to log into your *e*Processing Network online account and go to *e*PNInventory to add these items. For additional instructions on how to add "Categories" and "Departments", please review the *e*PNInventory User Guide.

To add an item to your *e*PNInventory:

1. Access your inventory management page by tapping the "Menu" and "Inventory" buttons (Figures 16 and 17).
2. Enter the required fields: "Product Name" and "Item SKU" (Figure 18).

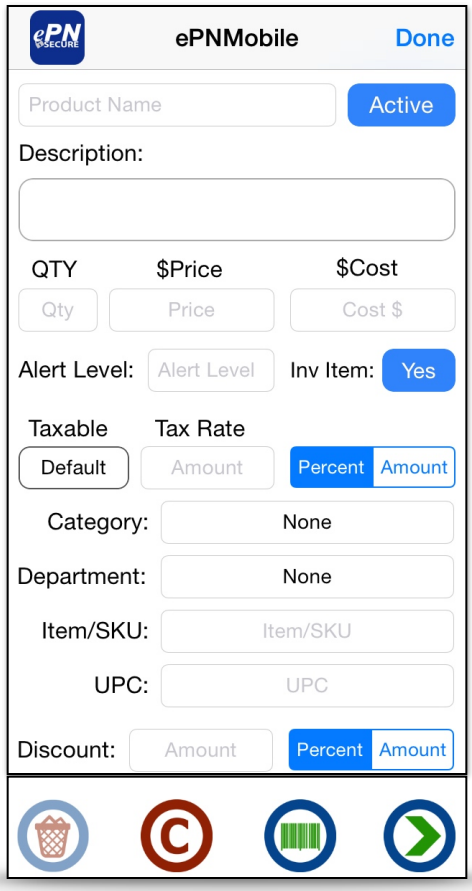


Figure 18 - Add Item Inventory Screen.

3. Enter additional fields: “Quantity” (QTY), “Price”, “Cost”, “Alert Level”, “Tax Rate” (Percentage or Amount), “Category”, “Department”, “UPC” and “Discount” (Amount or Percentage).
   a. Inventory items can be tagged as Active or Inactive.
   b. Products can be loaded as inventory items or non-inventory items.
   c. Tax rates can be determined under the “Taxable” button.
      i. The default tax rate is the tax rate that was set in your “Terminal Settings”. To use the default tax rate, select “Default”. To add a different tax rate, select “Yes” and set the tax rate as either a percentage or dollar amount.
      ii. To make an item nontaxable, select “No”.

4. To clear all sections tap the “Clear” button,  .

5. To scan a UPC code using your camera, tap the “Barcode” button,  .
   a. This button will launch your rear camera. To capture a UPC code, align the UPC code with the green box (Figure 19). Once the barcode is captured, the camera will close and the UPC will be added to the UPC field (Figure 19a). To cancel the camera function tap  .

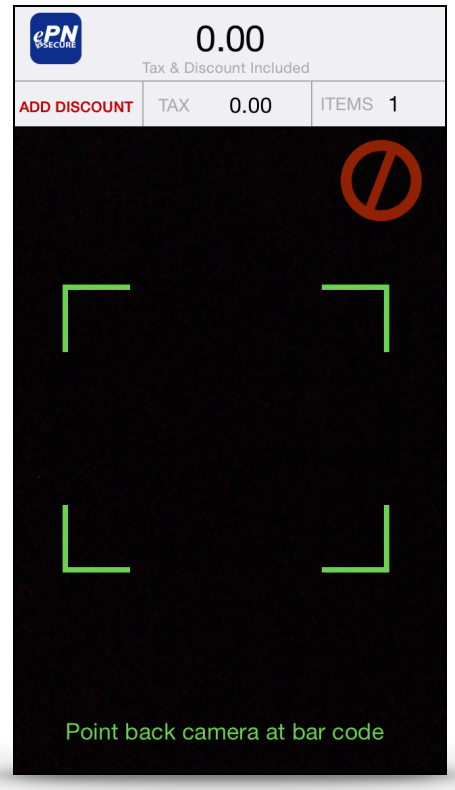


Figure 19 - Barcode scanner.

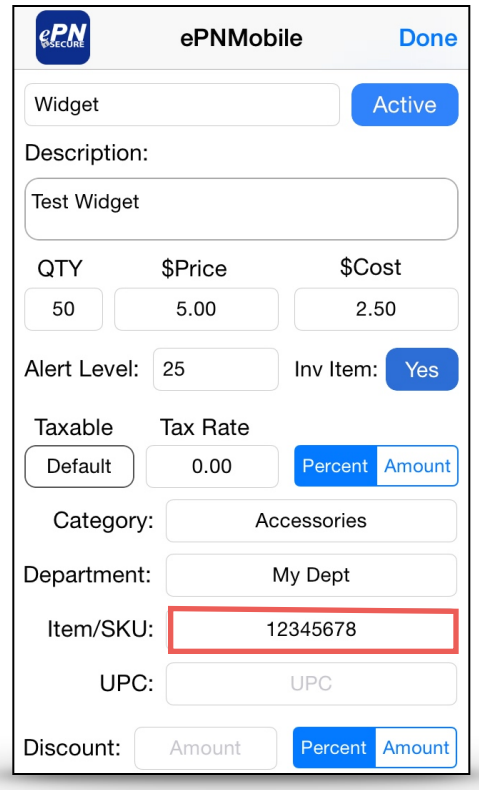


Figure 19a - Inventory Scree with SKU in red.

6. To add the inventory item to your online inventory, tap .
7. To view the item that was added in your inventory tap the "Refresh" button, , from your inventory management screen (Figure 17).

To edit an inventory item:

1. To edit an inventory item from *e*PNMobile application, tap "Menu" and "Inventory" to take you to your online inventory management system.
2. From your inventory list, locate the item you wish to edit (Figure 20).
3. Slide the inventory item to the left to reveal "Edit" button (Figure 20a).

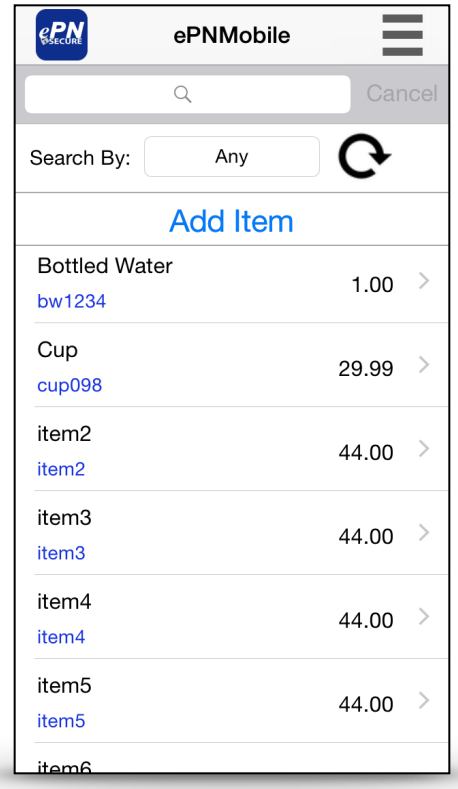


Figure 20 - Inventory Screen.

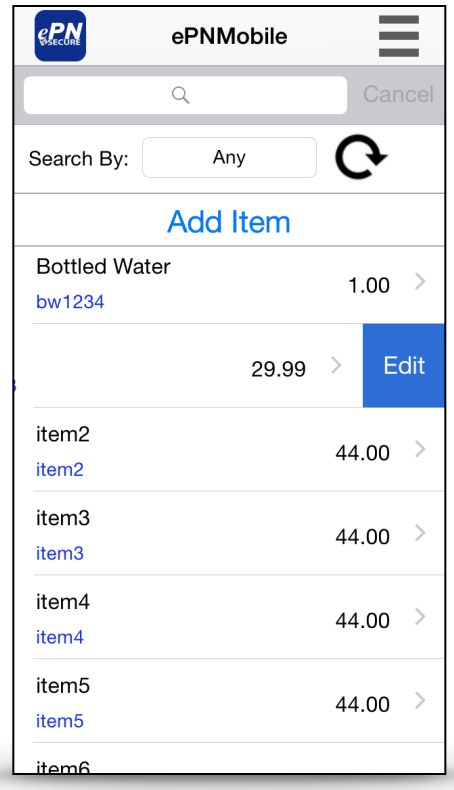


Figure 20a - "Edit button for "Cup" item.

4. Tap the "Edit" button (Figure 20).
5. Complete all edits to the inventory item (Figure 18) .
6. Tap  to save changes.
7. To remove an item from your inventory, in the "Edit Item" screen, tap  .

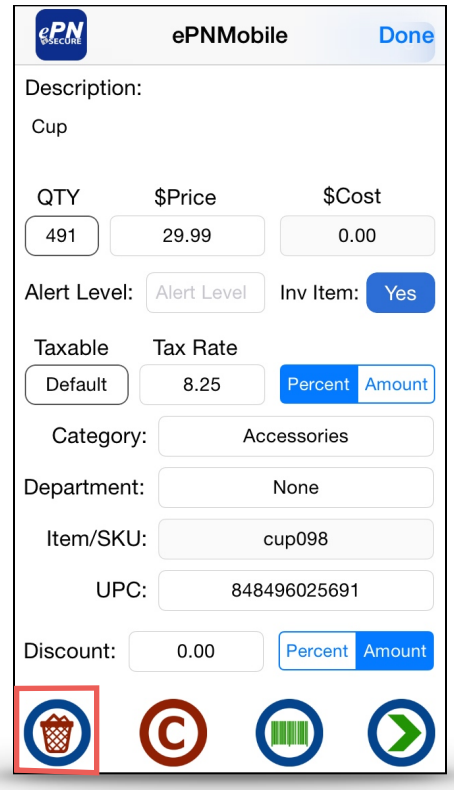


Figure 21 - Remove item icon in "Inventory Item" screen.

Making an Inventory Sale

The following instructions are intended for merchants who are using *e*PNMobile with the optional *e*PNInventory service enabled. You must have the "Order Builder" option enabled in your "Terminal Settings" to access your online inventory (Figure 4).

Upon activating your terminal with "Order Builder" enabled, you will see a screen similar to the one shown in Figure 22, with a list of products you have entered into *e*PNInventory.

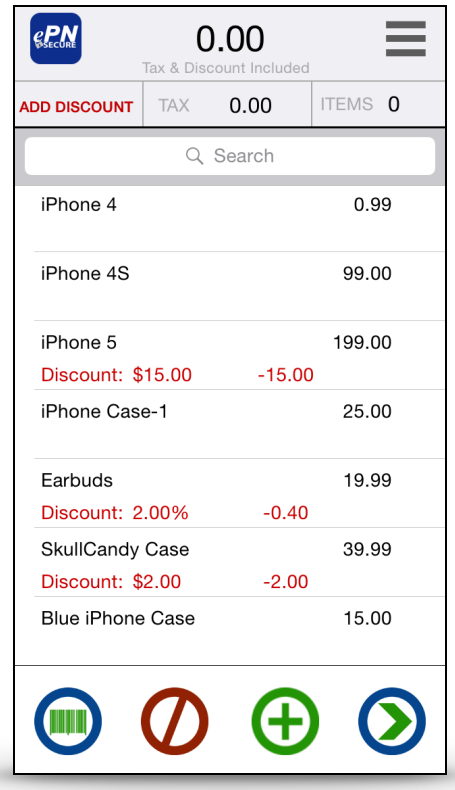


Figure 22 – Inventory Sales Main Screen.

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. You can also verify if products have been added to your inventory database through the *e*PNMobile application by taping "Menu" and "Inventory".
2. Double check that you have followed the directions in the "Activating Your Account" section of this document and verify "Order Builder" is enabled (Figure 4).

To initiate an inventory sale:

1. Tap on the item(s) you are going to sell one at a time. The item(s) will be added to your item count, as wells your total and tax, if applicable (Figure 23). To view a list of all item(s) in your transaction, tap the "Items" button (Figure 6d).
   a. If you would like to delete item(s) from your sale, tap the "Items" button (Figure 6d) to view the item(s) in your transaction. Swipe the item(s) you would like to delete to the left to reveal a "Delete" button. Tap "Delete" to remove item(s) from your sale (Figure 23a).

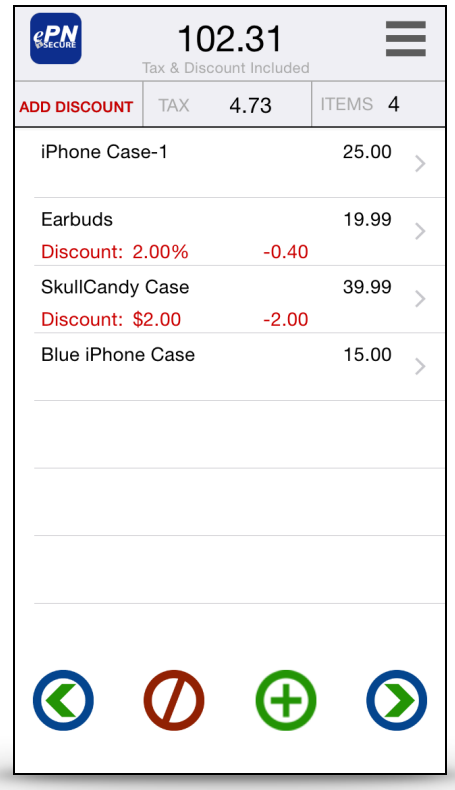


Figure 23 - Items List

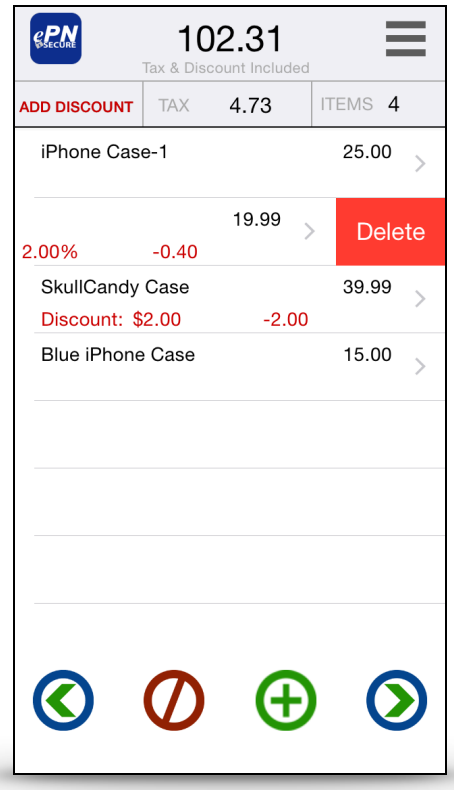


Figure 23a - Items list with Earbuds "Delete" button.

b. Tapping on the items already listed in the itemization table will allow you to edit the quantity, price, edit/add an item specific discount or tax (Figure 24).

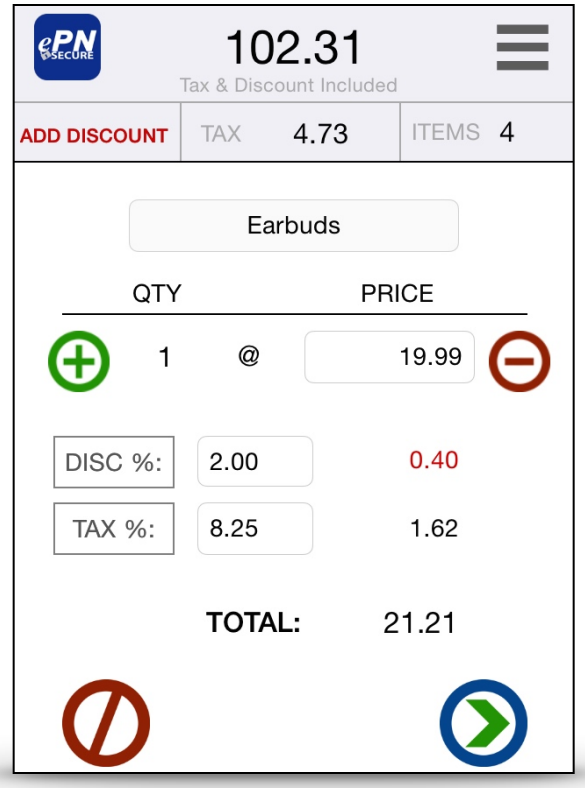


Figure 24 – Edit Inventory Screen.

2. Apply discounts, if applicable, to the **ENTIRE** sale by tapping on the "Add Discounts" button on the top right-hand corner of the screen (Figure 6b). Remember, this button applies a discount to potentially ALL items in your transaction.
   a. When the "Add Discounts" button is tapped, a dialog (Figure 25) appears with several options:
      i. Percent: discount percentage will apply to all items in the sale (Figure 25).
      ii. Amount: discounts exactly the amount entered from the total of the sale (Example, if someone has a $10 off coupon). To access the "Disc $," tap the "Disc %" button, (Figure 25a).
      iii. ExcludeDiscountedItems: by tapping this button, the discount percentage that is applied to the entire sale will NOT be applied to any discounted items in your sale (Figure 25).
      iv. To cancel adding a discount to your sale tap .

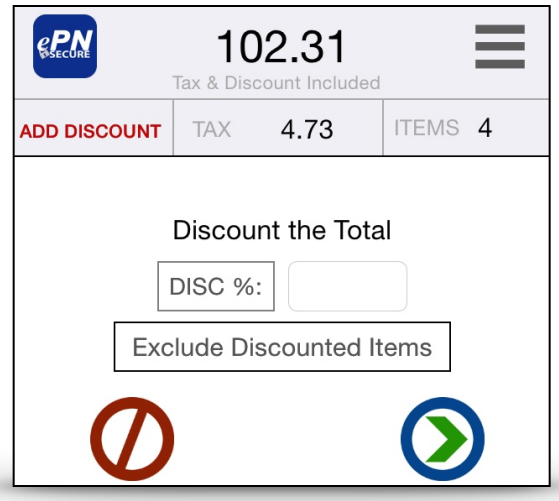


Figure 25 - Discount Percentage

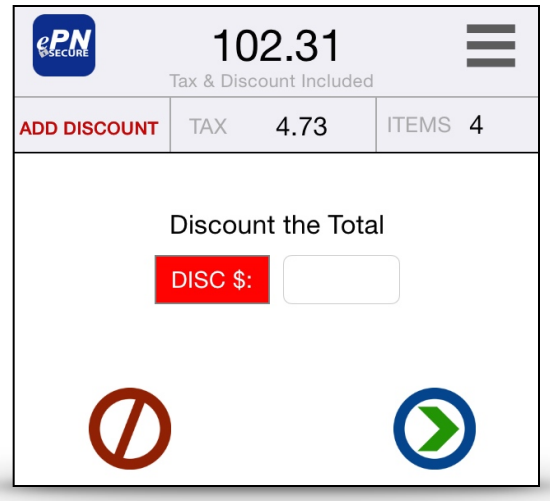


Figure 25a - Discount Dollar Button

3. You may add Non-Inventory items on the fly by tapping .

Fill in the dialog on Figure 26 and then tap . NOTE: This does NOT add the item to the master inventory database; it only adds it to this specific sale.

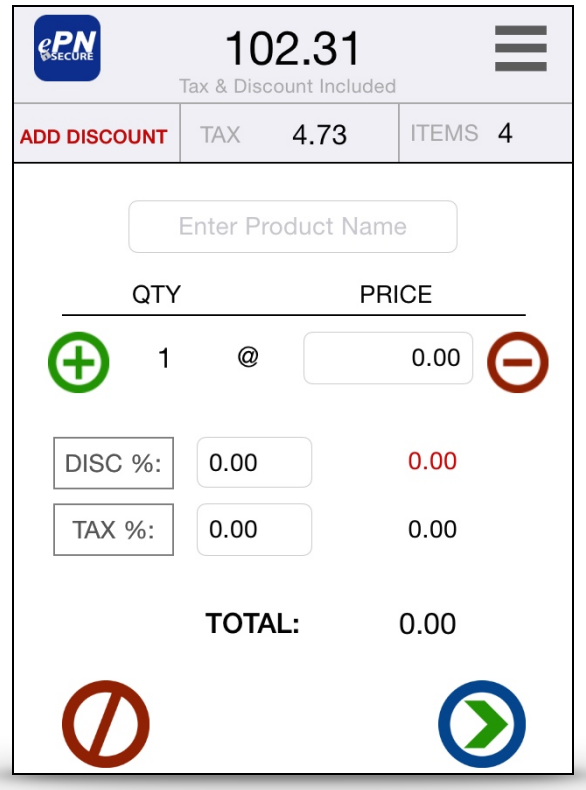


Figure 26 - Non-Inventory Item Screen.

4. Fill in as much of the customer information in the "Customer Information Screen" as possible. To access the "Customer Information Screen", tap the "Menu" icon in the top right-hand corner and select "Customer Info" (Figure 8, Figure 8a and Figure 8b). The "Customer Information Screen" allows you to capture your customer's name, address, email address and phone number. You are also able to include a QuickBooks® invoice number if you use a supported version of the accounting software and *e*PNPlugIn. Once you have completed entering the order data and customer information, tap to move to the "Payment Screen" (Figure 27).

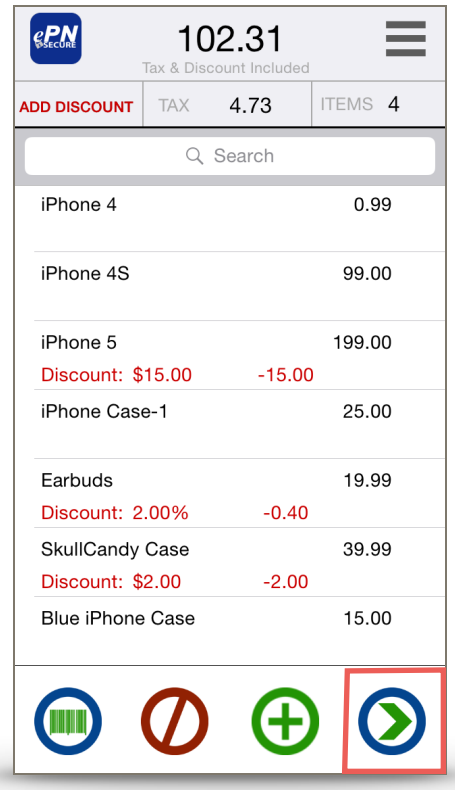


Figure 27 - "Next" arrow in red to access "Payment Screen".

6. From the "Payment Screen" (Figure 9), you may elect to accept a credit card, check or cash payment. Please note, if your account is not enabled to accept check payments and "Allow Checks" is not selected in the "Terminal Settings", it will not appear on this screen.
   a. If accepting a credit card, swipe the card through the credit card reader (Figure 10). To manually enter a card number, tap the "Credit Card" button and fill out all required information (Figure 10a). Once all information has been entered, tap to proceed to the signature screen.
      i. The "Signature Screen" (Figure 11) allows your customer to enter a tip amount, sign for the transaction and choose their receipt option. Your customer may enter a custom tip amount or choose a preset tip amount of 10%, 15% or 20%. After a tip amount is entered, the "Add Tip" button will be replaced with the tip amount (Figure 12). Your customer may then sign for the transaction and choose to receive a printed or emailed receipt, if applicable. If your customer is requesting an emailed receipt, enter the customer's email address in the "Email Address" field. Once all transaction information has been entered, tap to process the transaction.
      ii. To activate a receipt option, tap on the icon of the receipt option your customer would like. The "Envelope" icon is for emailed receipts and the "Printer" icon is for printed receipts. Your customer may receive both a printed and emailed receipt if they wish.
   b. If accepting a check payment (Figure 13 and 13a), enter the appropriate information based on your check processor and tap . This will submit the transaction and will provide the response on the next screen.

c. For cash payments (Figure 14), 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 next screen (Figure 15).

Making an Inventory Sale with Barcode Scanner

The following instructions are intended for merchants who are using *e*PNMobile with the optional *e*PNInventory service enabled. You must have the "Order Builder" option enabled in the "Terminal Settings" to access your online inventory (Figure 4).

Upon activating your terminal with the "Order Builder" enabled, your terminal screen (Figure 22) will show a list of products you have entered into *e*PNInventory.

Note: if you do not see a similar screen as depicted in Figure 22, 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. You can also verify if products have been added to your inventory database through the *e*PNMobile application by taping "Menu" and "Inventory".
2. Double check that you have followed the directions in the "Activating Your Account" section of this document and "Order Builder" is enabled (Figure 4).
3. Verify in your online inventory database your barcodes, or UPC codes, are loaded for your products. If your barcodes are not loaded, follow the instructions in the "Inventory Management" section for adding a barcode to an inventory item.

To initiate an inventory sale with barcode scanner:

1. Tap  to launch the rear camera.
2. Align your rear-facing camera to the barcode of your product (Figure 28).

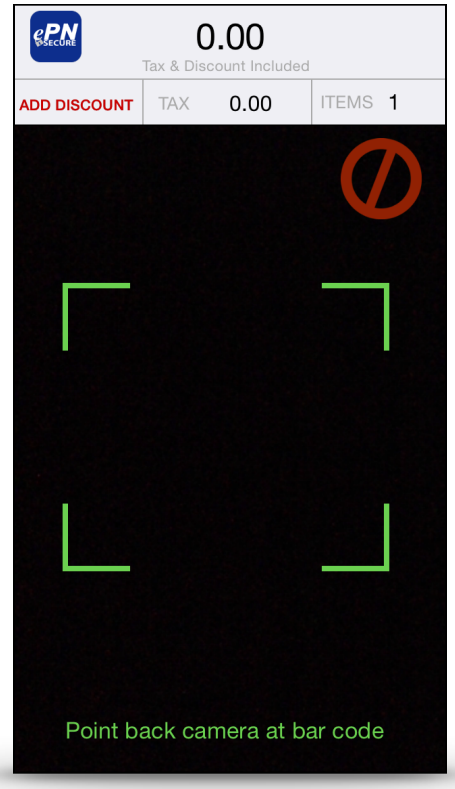


Figure 28 - Barcode Scanner.

3. When the camera detects the product barcode (Figure 29), the product will be added to your "Items" list. If your camera remains aligned on the product barcode, the product will continue to be added to your "Items" count. To exit the barcode scanner tap .

Figure 29 - Barcode reader Scanning barcode.

a. If you would like to delete item(s) from your sale, press the "Items" button (Figure 6d) to view the item(s) in your transaction. Swipe the item(s) you would like to delete to the left to reveal a "Delete" button. Tap "Delete" to remove the item (Figure 23a).
b. Tapping on item(s) already in the itemization table will allow you to edit the quality, price, edit/add an item-specific discount or tax (Figure 24).

4. Apply discounts, if applicable, to the **ENTIRE** sale by tapping on the "Add Discounts" button on the top right of the screen (Figure 6b). Remember, this button applies a discount to potentially ALL items in your transaction.
   a. When the "Add Discounts" button is tapped, a dialog (Figure 25) appears with several options:
      i. Percent: discount percentage will apply to all items in the sale (Figure 25).
      ii. Amount: discounts exactly the amount entered from the total of the sale (Example, if someone has a $10 off coupon). To access the "Disc $," tap the "Disc %" button (Figure 25a).
      iii. ExcludeDiscountedItems: by tapping this button, the discount percentage that is applied to the entire sale will NOT be applied to any discounted items in your sale (Figure 25).
      iv. To cancel adding a discount to your sale tap .
5. You may add Non-Inventory items on the fly by tapping . Fill in the dialog as in Figure 26 and tap . NOTE: This does NOT add the item to the master inventory database; it only adds it to this specific sale.
6. Fill in as much of the customer information in the "Customer Information Screen" as possible. To access the "Customer Information Screen", tap the "Menu" icon in the top right-hand corner and select "Customer Info" (Figure 8, Figure 8a and Figure 8b). The "Customer Information Screen" allows you to capture your customer's name, address, email address and phone number. You are also able to include a QuickBooks® invoice number if you use a supported version of the accounting software and *e*PNPlugIn. Once you have completed entering the order data and customer information, tap to move to the "Payment Screen" (Figure 27).
7. From the "Payment Screen" (Figure 9), you may elect to accept a credit card, check or cash payment. Please note, if your account is not enabled to accept check payments and "Accept Checks" is not enabled in your "Terminal Settings", it will not appear on this screen.
   a. If accepting a credit card, swipe the card through the credit card reader (Figure 10). To manually enter a car number, tap the "Credit Card" button and fill out all required information (Figure 10a). Once all information has been entered, tap to proceed to the signature screen.
      i. The signature screen (Figure 11) allows your customer to enter a tip amount, sign for the transaction and choose their receipt option. Your customer may enter a custom tip amount or choose a preset tip amount of 10%, 15% or 20%. After a tip amount is entered, the "Add Tip" button will be replaced with the tip amount (Figure 12). Your customer may then sign for the transaction and choose to receive a printed or emailed receipt, if applicable. If your customer is requesting an emailed receipt, enter the customer's email address in the "Email Address" field. Once all transaction information has been entered, tap to process the transaction.

ii. To activate a receipt option, tap on the icon of the receipt option your customer would like. The "Envelope" icon is for emailed receipts and the "Printer" icon is for printed receipts. Your customer may receive both a printed and emailed receipt if they wish.

b. If accepting a check payment (Figure 13 and 13a), enter the appropriate information based upon your check processor and tap . This will submit the transaction and will provide the response on the next screen.

c. For cash payments (Figure 14), 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.

9. After the transaction is submitted, the results are displayed on the next screen (Figure 15).

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 "Menu" icon: .
2. Tap "Current Batch" (Figure 30).

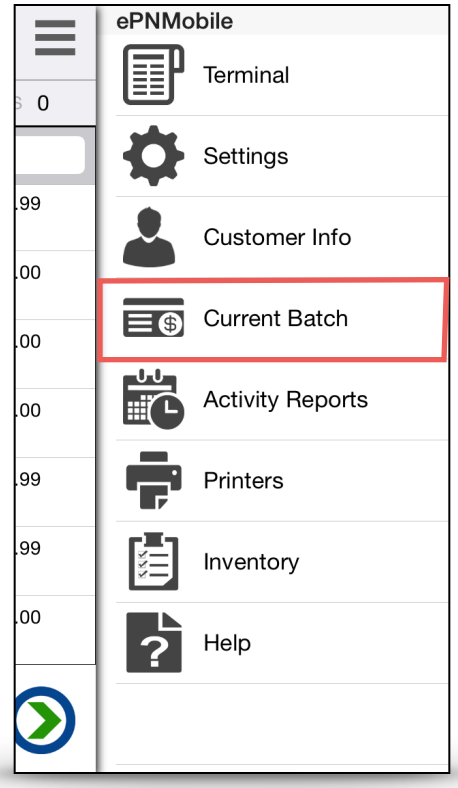


Figure 30 - Current Batch in red.

3. Your current batch will load with all transaction amounts and card types (Figure 31).

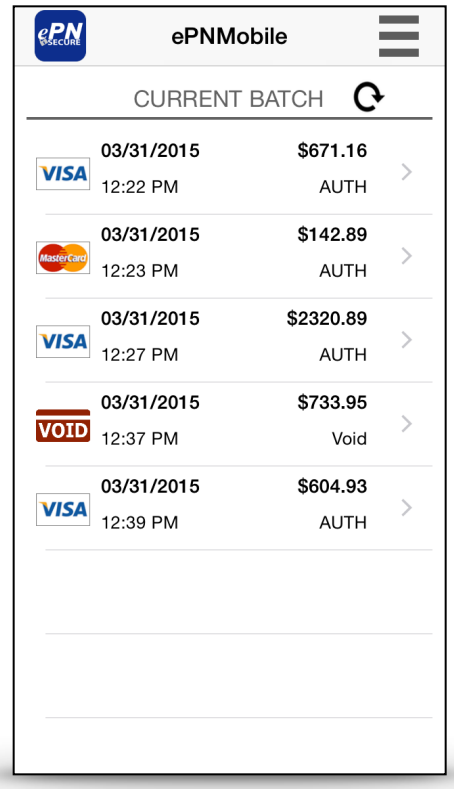


Figure 31 - Current Batch view.

4. Locate the transaction you wish to void and swipe to the left to reveal the "Void" button (Figure 32).

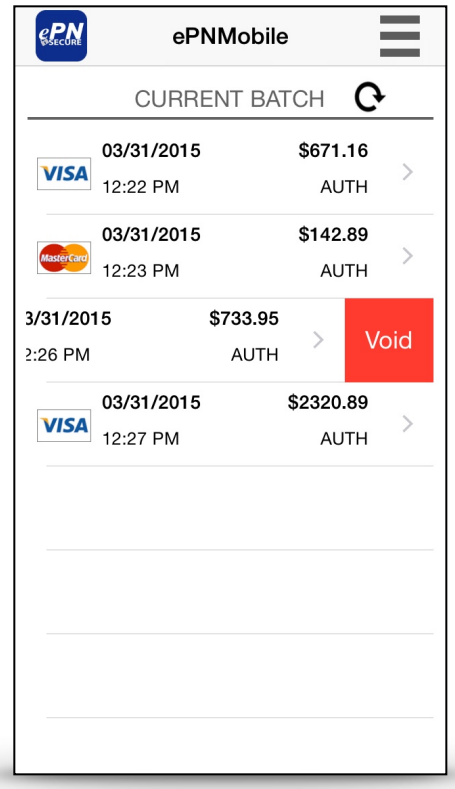


Figure 32 - "Void" Button.

5. Tap “Void” to void the sale.
6. Enter an email address to email a receipt to your customer or tap “Cancel” to cancel the void (Figure 33). If you are not wanting to email a receipt, do not enter an email address in the “Email Address” field. Tap “OK” to process the void.

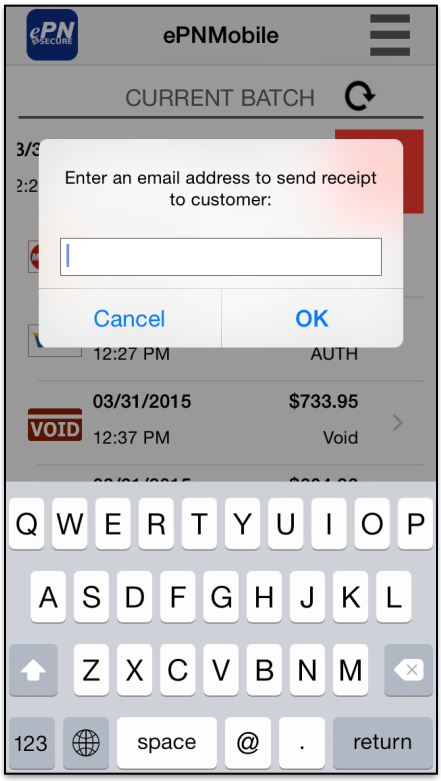


Figure 33 - Email address screen.

7. Tap “Ok” to process the void (Figure 34) then tap “Ok” to return to your current batch (Figure 34a).

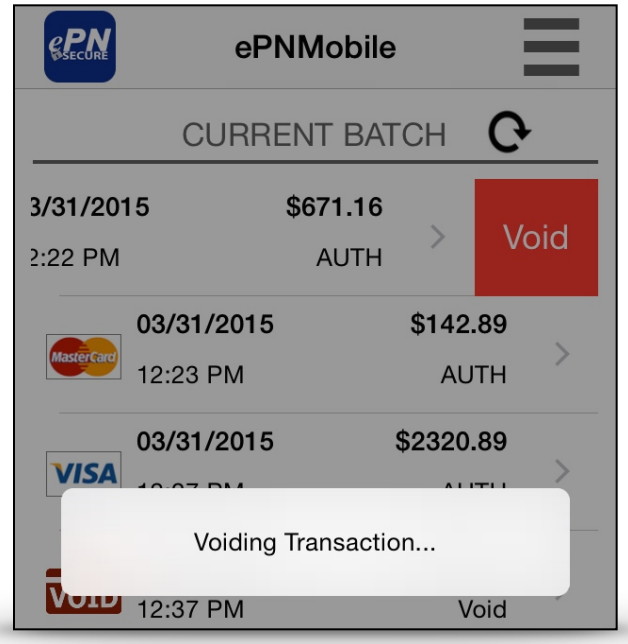


Figure 34 - Voiding transaction

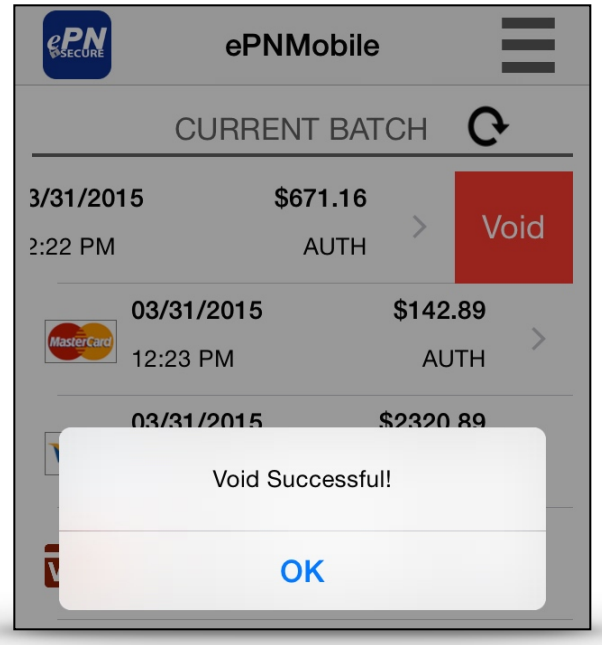


Figure 34a - Void Successful

8. Void will display in Current Batch as in Figure 35. To access your Current Batch, Tap “Menu” and “Current Batch”.

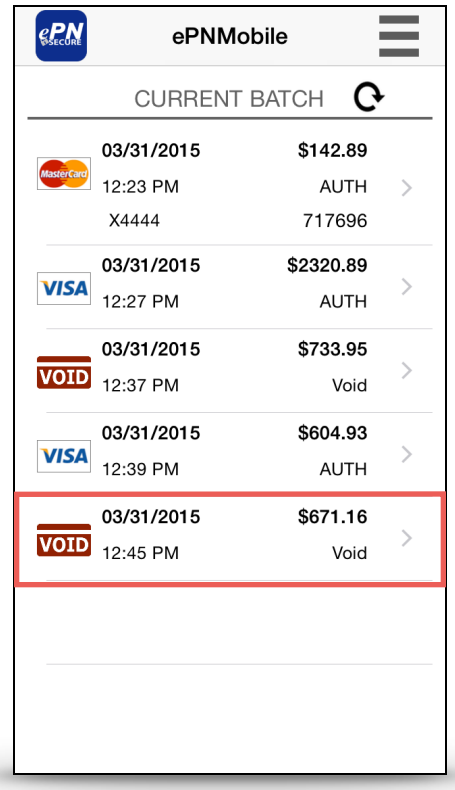


Figure 35 - Current Batch with Voided Transactions.

Refunds from Transaction Activity

Refunds are performed when a cardholder would like to return a 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 “Menu” icon:  .
2. Tap “Activity Reports” (Figure 36).

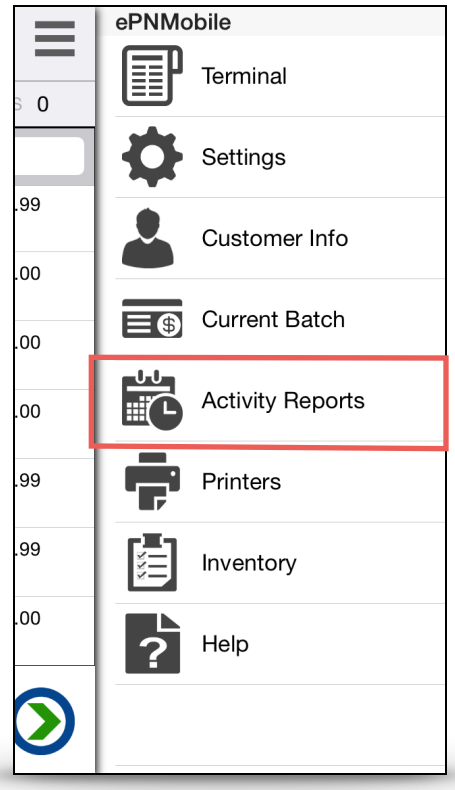


Figure 36 - Activity Report in red.

3. Enter the date range when the transaction was run (Figure 37). Once you have entered the start and end date tap to locate all transactions from the date range selected.

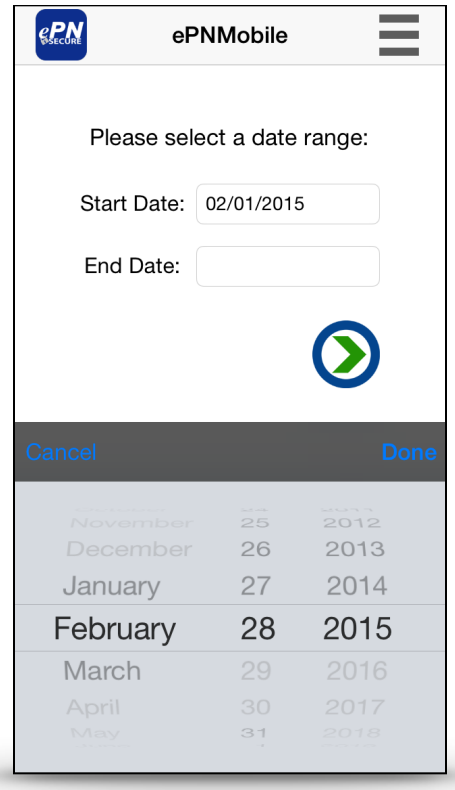


Figure 37 - Date Range.

4. Locate the transaction you wish to return in the transaction report for the date(s) requested (Figure 38).

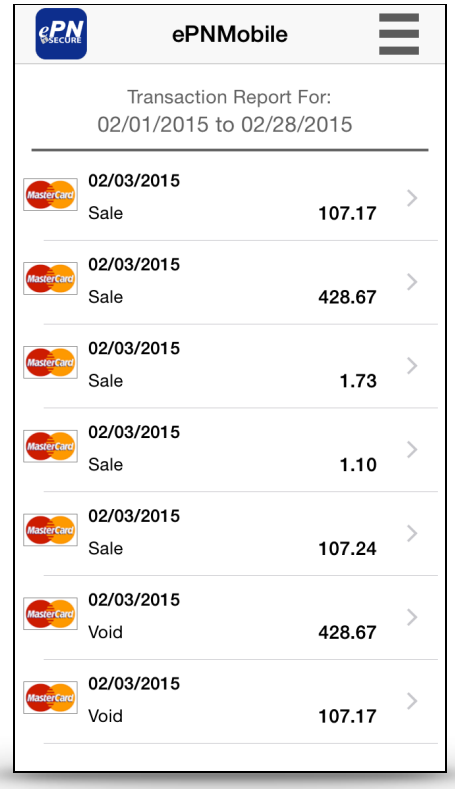


Figure 38 - Transaction Report.

5. Swipe the transaction to the left to reveal the “Return” button (Figure 39).

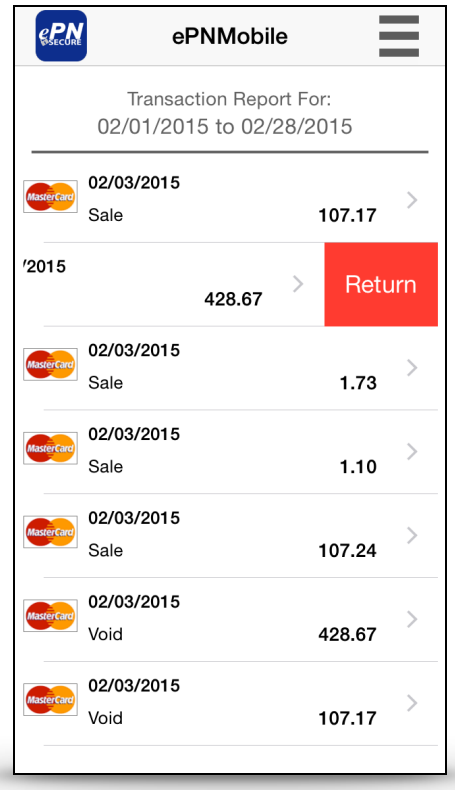


Figure 39 - Return Button.

6. Tap "Return" to process the Return the transaction.
7. Enter an email address to email the receipt to the customer or tap "Cancel" to cancel the return transaction (Figure 40). If your customer is not wanting an email receipt, do not ender an email address in the "Email Address" field. Tap "OK" to process the return.

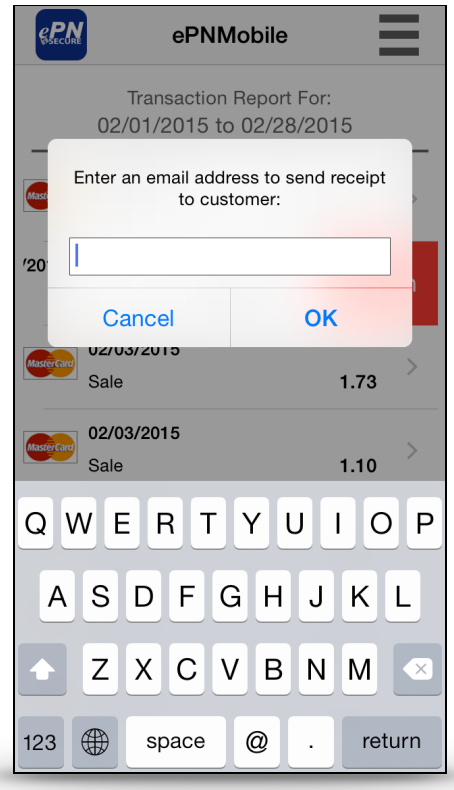


Figure 40 - Email address entry screen.

8. Tap “Ok” to process the return (Figure 41) then tap “Ok” to return to your transaction report (Figure 41a).

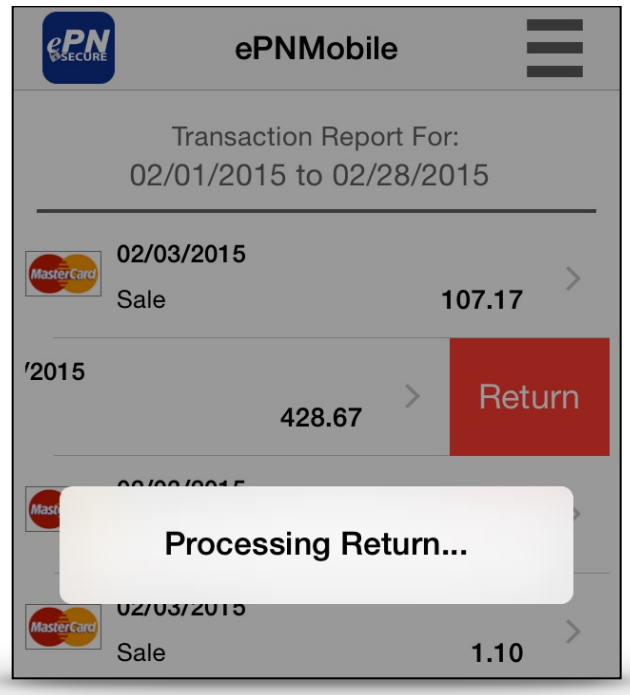


Figure 41 - Processing Return.

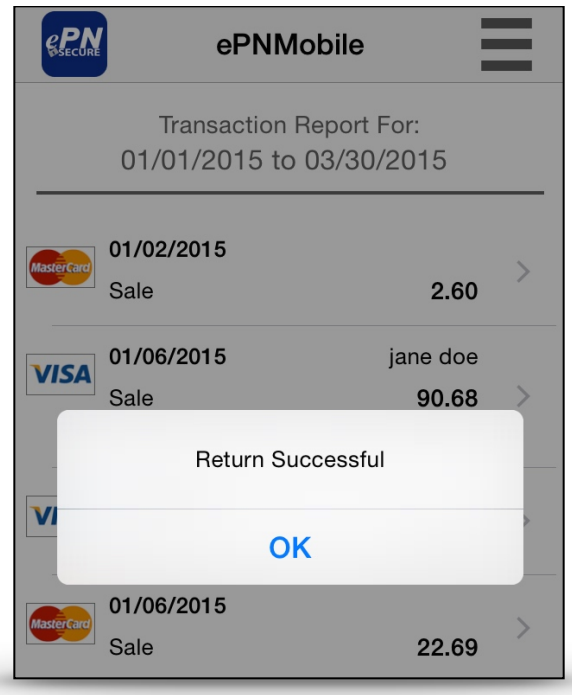


Figure 41a - Return Transaction Successful.

9. To view the return transaction tap “Menu” and “Current Batch” (Figure 42).

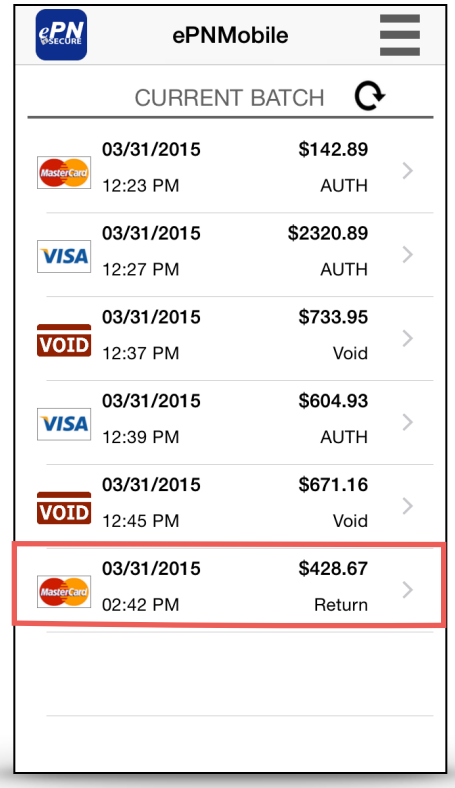


Figure 42 - Current Batch with Return in red.

Card Present Refunds

In addition to performing refunds from the "Transaction History" screen, you may perform refunds from your terminal. 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 item(s)/service(s) being returned and tap (Figure 43). NOTE: you may also enter the amount of the refund without itemizing.

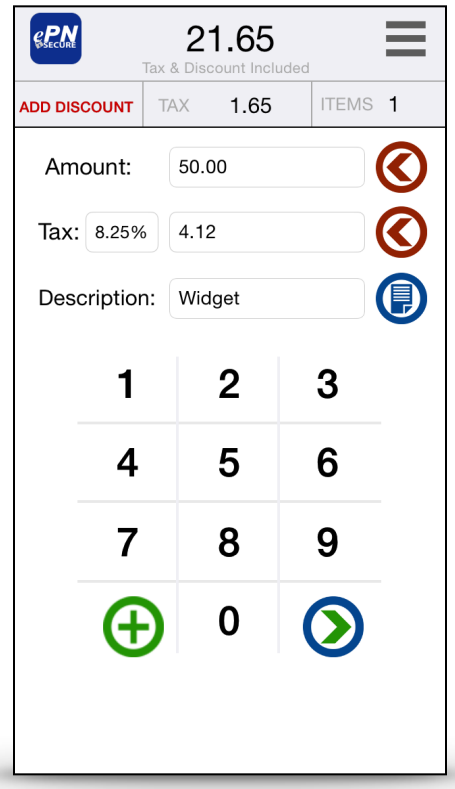


Figure 43 - Transaction Screen.

2. Tap to proceed to the payment screen.
3. Tap the "Sale" button to turn it into a red "Return/Refund" (Figure 44 and Figure 44a).

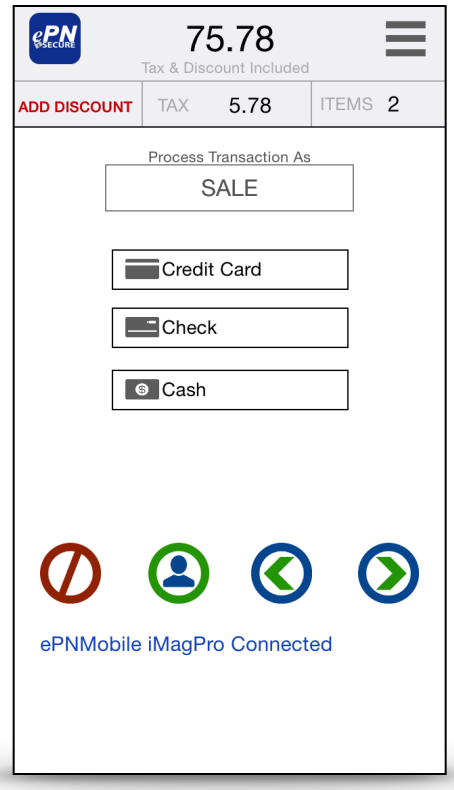


Figure 44 - Sale Button.

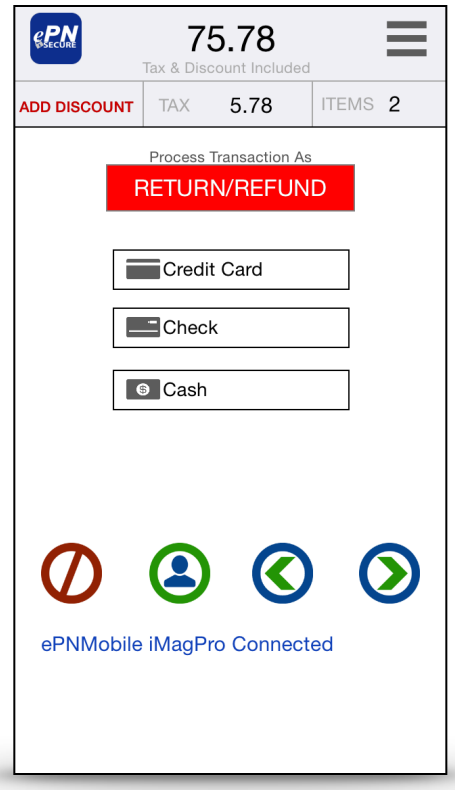


Figure 44a - Return/Refund Button.

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

   a. If accepting a credit card, swipe the card through the reader or tap "Credit Card" to manually enter the card information. Once all of the payment information has been entered tap (Figure 10 and 10a).

      i. On the "Signature Screen", (Figure 46), the cardholder will sign for the transaction and determine how they will receive their receipt. When finished, tap to process the transaction. Note: The "Signature Screen" does not include the "Add Tip" button. If you are returning a tip amount, include it in the return amount being processed.

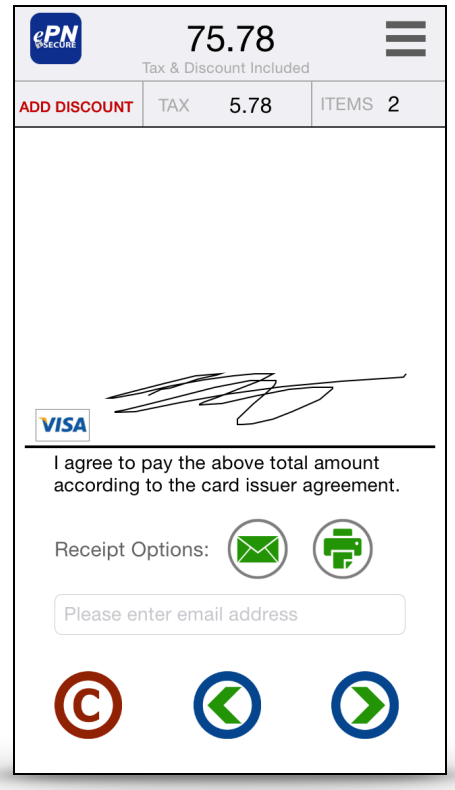


Figure 46 - Signature Screen with email and print receipt options.

b. Refunding a check is not supported in ePNMobile.

c. For cash refunds, enter the amount and tap to submit the transaction.

5. After the transaction is submitted, the results are displayed on the "Results Screen" (Figure 46a).

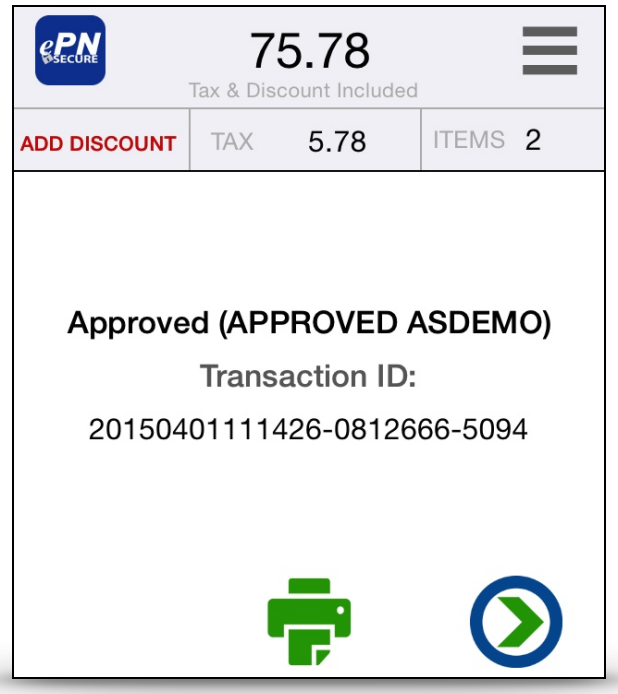


Figure 46a - Approval Screen with option to reprint.

Printing a Receipt with a Bluetooth Printer

*e*PNMobile v. 3.1.36, and subsequent updates, give merchants the ability to print receipts for their customers from their iPhone using a Bluetooth-enabled printer. The Bluetooth printer *e*Processing Network is supporting is the Epson TM-T20II Bluetooth. To purchase one of these printers, please contact your merchant service representative.

Prior to printing receipts from the *e*PNMobile application, you must first pair the printer to your iPhone's Bluetooth.

To pair the printer to your iPhone:

1. Tap your iPhone's "Settings" button,  .
2. Verify Bluetooth is enabled, 

.
3. Tap on the Bluetooth setting to view all paired and unpaired Bluetooth devices.
4. Search for the printer name under "Other Devices", if you have not previously paired the printer, or "My Devices" if you have paired the printer to your iPhone (Figure 47 and 47a).

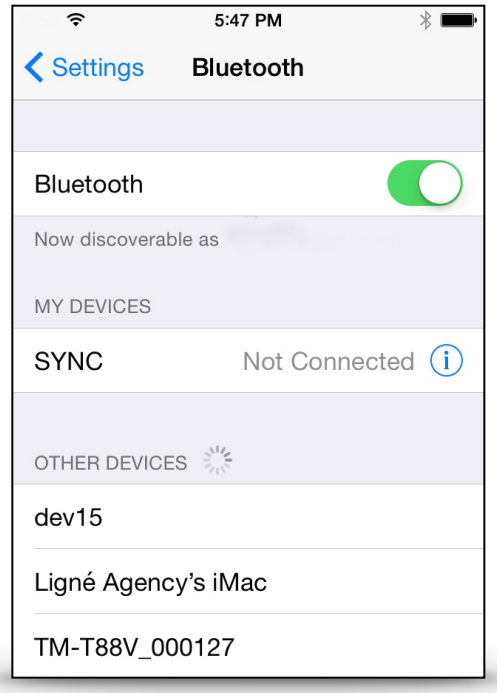


Figure 47 - Printer under "Other Devices".

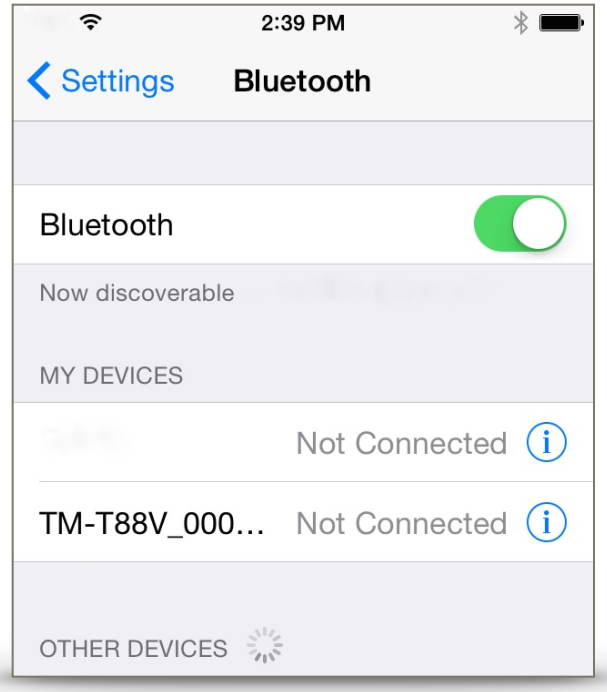


Figure 47a - Printer under "My Devices" once paired.

5. Tap the printer name to pair with your iPhone.

Once the Epson TM-T20II printer is connected to your iPhone, you will now need to connect the Epson TM-T20II Bluetooth to your *e*PNMobile application.

To connect the Epson TM-T20II printer to *e*PNMobile application v. 3.1.36 and subsequent versions:

1. Tap the *e*PNMobile application icon: .
2. Tap the "Menu" icon: .
3. Tap "Printers" from the menu list (Figure 48).

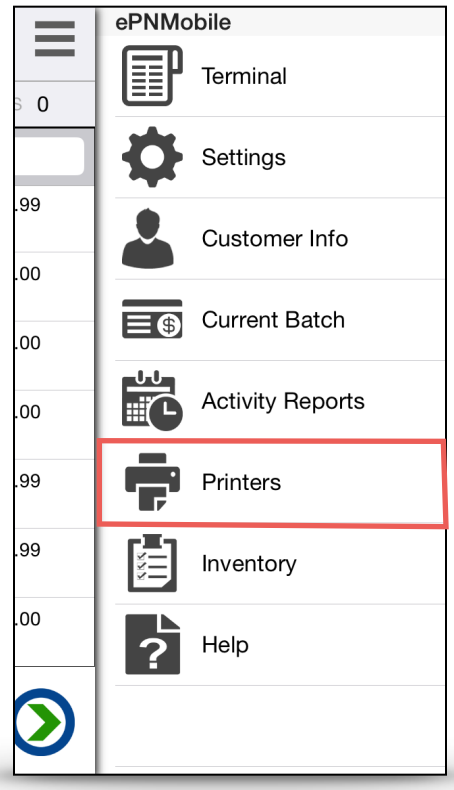


Figure 48 - "Printers" button.

4. Slide the "Print Merchant Copy" switch to the right if you would like a merchant copy of your receipts printed for each transaction in which a receipt is printed (Figure 49).

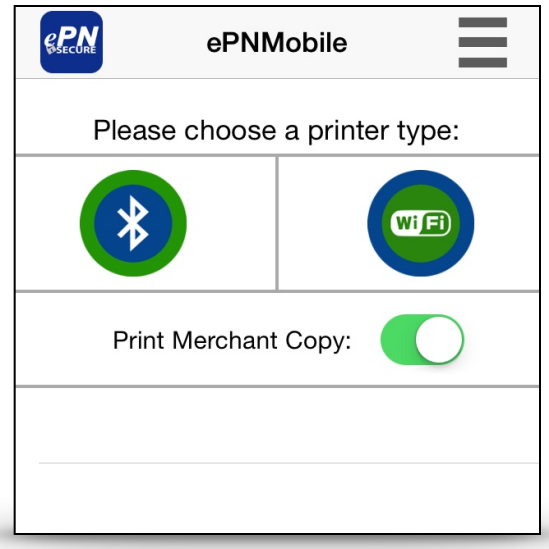


Figure 49 - Printer Type with Merchant Copy enabled.

5. Tap the Bluetooth Icon (Figure 49) to list all Bluetooth printers.
6. Tap to select your printer from the printer list (Figure 50).

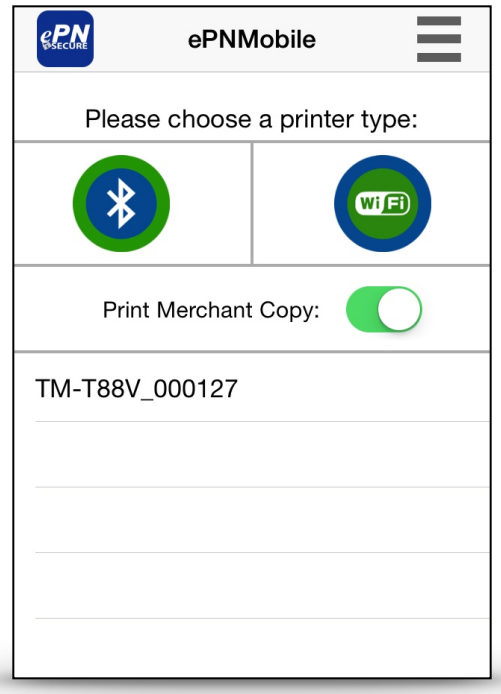


Figure 50 - Bluetooth Printer List.

7. You will receive a message that the printer has been added. Tap “OK” to return to your terminal screen.

To process and print a receipt for a transaction:

1. Enter transaction information in the main screen based upon your transaction type. If you are manually entering the transaction, include the “Amount”, “Tax” and “Description” of all item(s) in your transaction.

a. If you would like to delete item(s) from your sale, tap the "Items" button (Figure 6d) to view the item(s) in your transaction. Swipe the item(s) you would like to delete to the left to reveal a "Delete" button. Tap "Delete" to remove the item(s) (Figure 23a).
b. Tapping on item(s) already in the itemization table will allow you to edit the quality, price, edit/add an item specific discount or tax (Figure 24).

2. Apply discounts, if applicable, to the **ENTIRE** sale by tapping on the "Add Discounts" button on the top right-hand corner of the screen (Figure 6b). Remember, this button applies a discount to potentially ALL items in your transaction.
   a. When the "Add Discounts" button is tapped, a dialog (Figure 25) appears with several options:
      i. Percent: discount percentage will apply to all items in the sale (Figure 25).
      ii. Amount: discounts exactly the amount entered from the total of the sale (Example, if someone has a $10 off coupon). To access the "Disc $," tap the "Disc %" button (Figure 25a).
      iii. ExcludeDiscountedItems: by tapping this button the discount percentage that is applied to the entire sale will NOT be applied to any discounted items in your sale (Figure 25).
      iv. To cancel adding a discount to your sale tap .

3. Fill in as much of the customer information in the "Customer Information Screen" as possible. To access the "Customer Information Screen," tap the "Menu" icon in the top right-hand corner of the screen and select "Customer Info" (Figure 8, Figure 8a and Figure 8b). The "Customer Information Screen" allows you to capture your customer's name, address, email address and phone number. You are also able to include a QuickBooks® invoice number if you use a supported version of the accounting software and *e*PNPlugIn. Once you have completed entering the order data and customer information, tap to move to the "Payment Screen" (Figure 27).

5. From the "Payment Screen" (Figure 9), 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, and "AcceptChecks" is not enabled in the "Terminal Settings" screen the option will not appear on this screen.
   a. If accepting a credit card, swipe the card through the credit card reader (Figure 10). To manually enter a card number, tap the "Credit Card" button and fill out all required information (Figure 10a).

      Once all information has been entered, tap to proceed to the "Signature Screen".
      i. The "Signature Screen" (Figure 11) allows your customer to enter a tip amount, sign for the transaction and choose their receipt option. Your customer may enter a custom tip amount or choose a preset amount of 10%, 15% or 20%. After a tip amount is entered, the "Add Tip" button will be replaced with the tip amount (Figure 12). Your customer may then sign for the transaction and choose to receive a printed or emailed receipt, if applicable.
      ii. To activate a receipt option, tap on the icon of the receipt option your customer would like. The "Envelope" icon is for emailed receipts and the "Printer" icon is for printed receipts. Your customer may receive both a printed and emailed receipt if they wish. If your customer is requesting an emailed receipt, enter the customer's email address in the "Email Address" field.

      Once all transaction information has been entered, tap to process the transaction.
      iii. Once your transaction has processed and been approved, your receipt will print.
      iv. To reprint a receipt, tap the "Printer" icon on the "Transaction Approval" page (Figure 50).

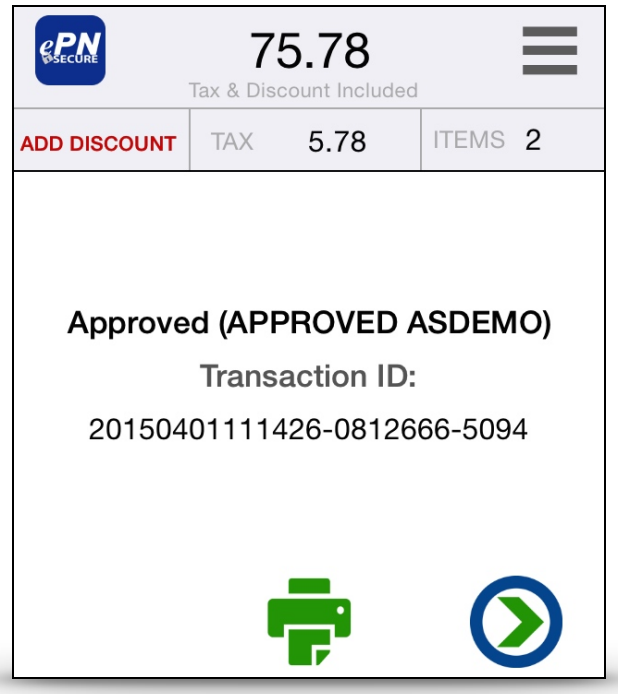


Figure 50 - Approved Transaction Screen with "Printer" icon.

b. If accepting a check payment (Figure 13 and 13a), enter the appropriate information based upon your check processor and tap . This will submit the transaction and will provide the response on the next screen and print your receipt.
c. For cash payments (Figure 14), enter an amount equal to or greater than the total. Currently, ePNMobile does not support multiple payment types simultaneously. This will submit the transaction, print a receipt and provide the response on the next screen with the appropriate change – if applicable.

Printing a Receipt with a WIFI Printer

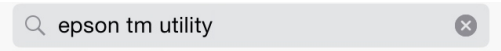
*e*PNMobile v. 3.1.36, and subsequent updates, give merchants the ability to print receipts for their customers from their iPhone using a WIFI enabled printer. The WIFI printer *e*Processing Network is supporting is the Epson TM-T20II WIFI. To purchase one of these printers, please contact your merchant service representative.

Prior to printing receipts from the *e*PNMobile application, you must first connect the printer to your WIFI network. To connect your printer to your WIFI network, follow the instructions provided by Epson.

To connect your iPhone to the TM-T20II WIFI:

1. Download the Epson TM Utility Application.

a. To download the application, tap the App Store Icon:  .

b. Type “Epson TMUtility” in the search box: 

.

c. The Application will appear in your results field (Figure 51).

Figure 51 - Epson TM Utility with cloud icon.

d. Tap the “Free” button to download. If the application has already been downloaded, a “cloud” icon will appear (Figure 51). To download, tap the “cloud” icon.

e. Tap “Open” to launch the application.

2. Configure your printer to the application by tapping “Printer is not Selected” (Figure 52).

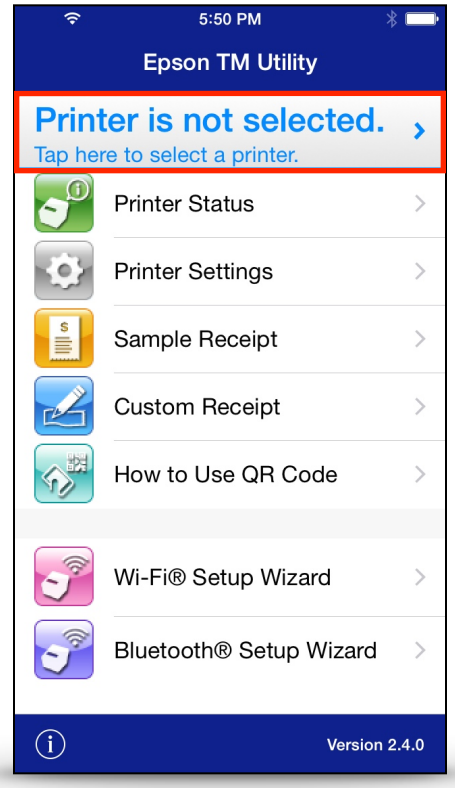


Figure 52 - Epson TM Utility Home Screen with “Printer not selected” in red.

3. Select your printer's IP from the list provided (Figure 53).

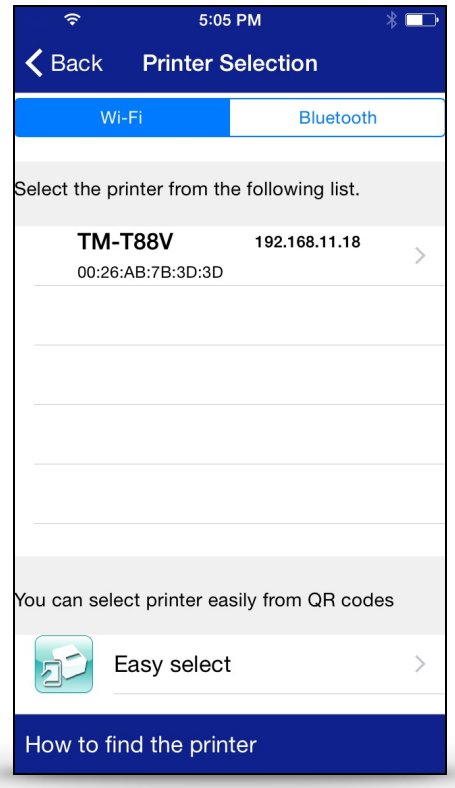


Figure 53 - Printer IP Address List.

4. Once your printer has been configured to the application, your printer will appear where "Printer is not selected" was located (Figure 54).

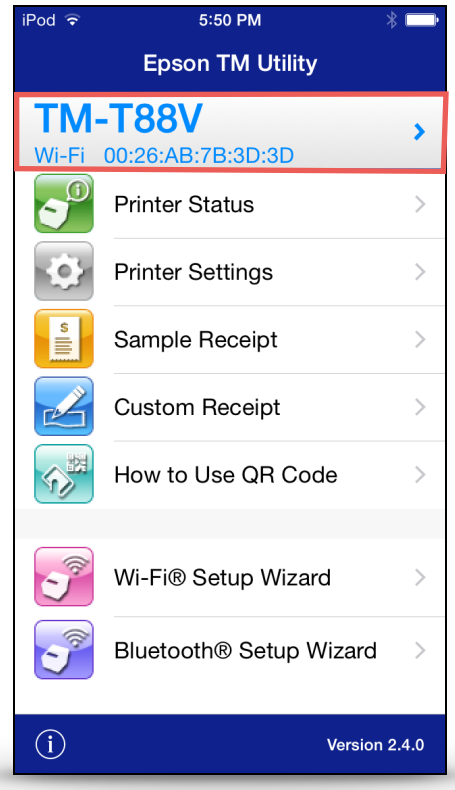


Figure 54 - TM-T88V printer configured to application.

Once you have configured your printer to the TM Utility application, you will need to configure your printer to the *e*PNMobile application.

To connect the Epson TM-T20II WIFI printer to the *e*PNMobile application v. 3.1.36 and subsequent versions:

1. Tap on the *e*PNMobile application: 

.

2. Tap the “Menu” icon:  .
3. Tap “Printers” from the menu list (Figure 55).

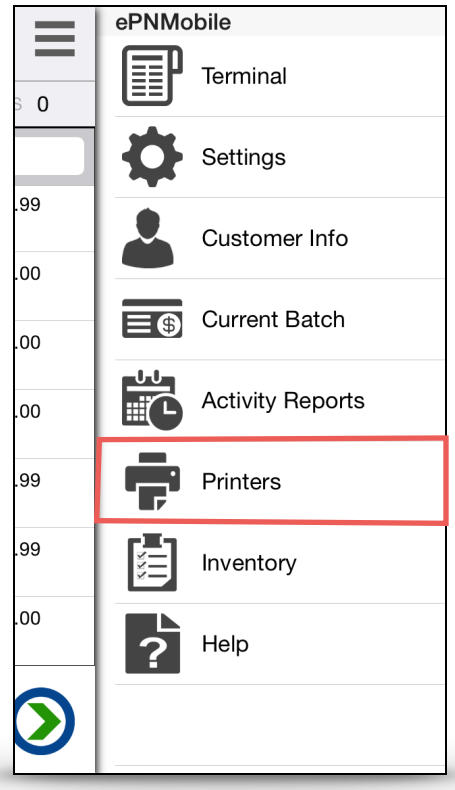


Figure 55 - Printers is in Red.

4. Slide the "Print Merchant Copy" switch to the right if you would like a merchant copy of your receipts printed for each transaction in which a receipt is printed (Figure 56).
5. Tap the WIFI Icon (Figure 56) to list all WIFI printers.

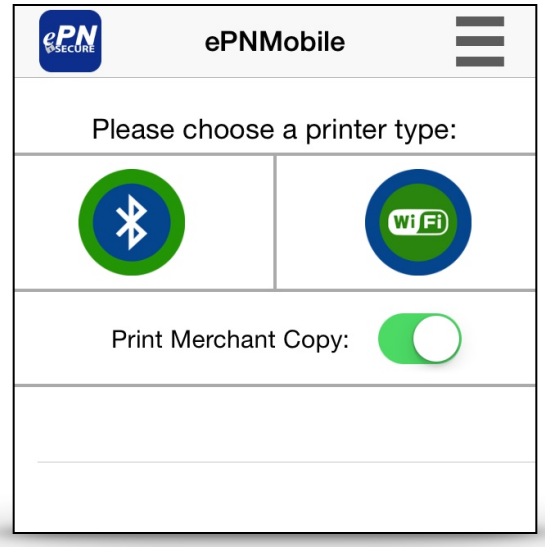


Figure 56 - Printer type with Print Merchant Copy enabled.

6. Tap your printer's IP address from the printer list (Figure 57).

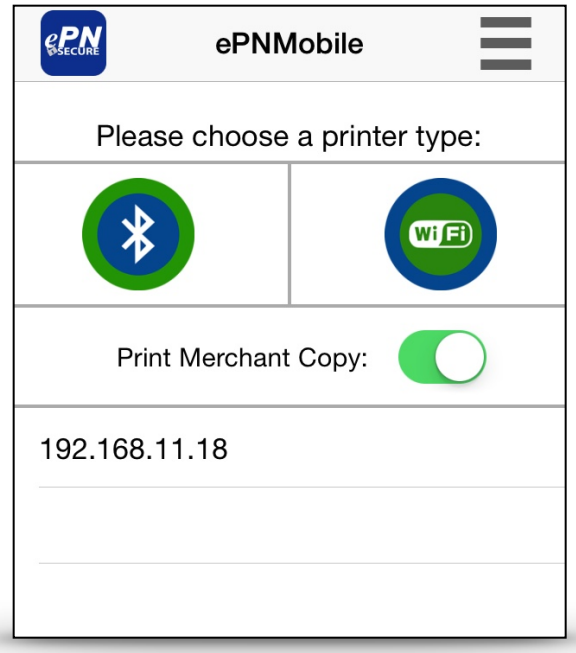


Figure 57 - WIFI printer list.

7. You will received a message that the printer has been added. Tap "OK" to return to your terminal screen.

To process and print a receipt for a transaction:

1. Enter transaction information in the main screen based upon your transaction type. If you are manually entering the transaction, include the "Amount", "Tax" and "Description" of all items in your transaction.
   a. If you would like to delete item(s) from your sale, tap the "Items" button (Figure 6d) to view the item(s) in your transaction. Swipe the item(s) you would like to delete to the left to reveal a "Delete" button. Tap "Delete" to remove the item(s) (Figure 23a).
   b. Tapping on item(s) already on the itemization table will allow you to edit the quality, price, edit/add an item-specific discount or tax (Figure 24).

2. Apply discounts, if applicable, to the **ENTIRE** sale by tapping on the "Add Discounts" button on the top right-right hand corner of the screen (Figure 6b). Remember, this button applies a discount to potentially ALL items in your transaction.
   a. When the "Add Discounts" button is tapped, a dialog (Figure 25) appears with several options:
      i. Percent: discount percentage will apply to all items in the sale (Figure 25).
      ii. Amount: discounts exactly the amount entered from the total of the sale (Example, if someone has a $10 off coupon). To access the "Disc $," tap the "Disc %" button (Figure 25a).
      iii. ExcludeDiscountedItems: by tapping this button the discount percentage that is applied to the entire sale will NOT be applied to any discounted items in your sale (Figure 25).
      iv. To cancel adding a discount to your sale tap ⊘.

3. Fill in as much of the customer information in the "Customer Information Screen" as possible. To access the "Customer Information Screen" tap the "Menu" icon in the top right-hand corner of the screen and select "Customer Info" (Figure 8, Figure 8a and Figure 8b). The "Customer Information Screen" allows you to capture your customer's name, address, email address and phone number. You are also able to include a QuickBooks® invoice number if you use a supported version of the accounting software and *e*PNPlugIn. Once you have completed entering the order data and customer information, tap to move to the "Payment Screen" (Figure 27).

5. From the "Payment Screen" (Figure 9), 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 and "Accept Checks is not enabled in your "Terminal Settings", the option will not appear on this screen.
   a. If accepting a credit card, swipe the card through the credit card reader (Figure 10). To manually enter a card number, tap the "Credit Card" button and fill out all required information (Figure 10a). Once all information has been entered, tap to proceed to the "Signature Screen".
      i. The "Signature Screen" (Figure 11) allows your customer to enter a tip amount, sign for the transaction and choose their receipt option. Your customer may enter a custom amount or choose a preset tip amount of 10%, 15% or 20%. After a tip amount is entered, the "Add Tip" button will be replaced with the tip amount (Figure 12). Your customer may then sign for the transaction and choose to receive a printed or emailed receipt, if applicable.
      ii. To activate a receipt option, tap on the icon of the receipt option your customer would like. The "Envelope" icon is for emailed receipts and the "Printer" icon is for printed receipts. Your customer may receive both a printed and emailed receipt if they wish. If your customer is requesting an emailed receipt, enter the customer's email address in the "Email Address" field. Once all transaction information has been entered, tap to process the transaction.
      iii. Once your transaction has processed and been approved, your receipt will print.
      iv. To reprint a receipt, tap the "Printer" icon on the "Transaction Approval" page (Figure 58).

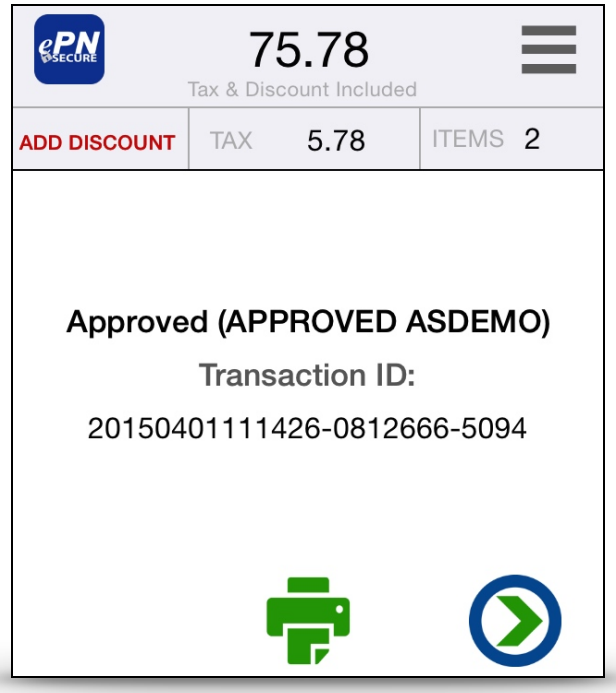


Figure 58 - Printer Icon.

b. If accepting a check payment (Figure 13 and 13a), enter the appropriate information and tap . This will submit the transaction and will provide the response on the next screen as well as print a receipt.
c. For cash payments (Figure 14), enter an amount equal to or greater than the total. Currently, ePNMobile does not support multiple payment types simultaneously. This will submit the transaction, print a receipt and provide the response on the next screen, with the appropriate change – if applicable.

Document Change Log

3/20/2014 - Initial document completed.

3/31/2015 - Added inventory sections.

4/15/2015 - Added Bluetooth and WIfI Printer Instructions and updated screen shots.

END OF DOCUMENT