vSecureGateway

iPad User Guide

Version 120619

iPUX User Guide

Table of Contents

Configuration Menu

# Downloading and Installing Your Software

To begin processing transactions through vSecureGateway's CellSwipe for the iPad, the first step is to download the CellSwipe application and install it on your iPad. To install the application perform the following steps: (Please note a fee may apply)

1. From the iPad using iTunes go to the "App Store"

2. Select the "Search" button and enter "CellSwipe"

3. Select the "CellSwipe for iPad" application

4. On the info page, press the "$19.99" button which will prompt the user to enter their user id and password for the app store.

5. The application will automatically start to download

6. After download is complete the Application will be available for selection

Login

CellSwipe for the iPad requires a username and password specific to your account. This information is in your welcome email from Digital Financial Group Customer Service
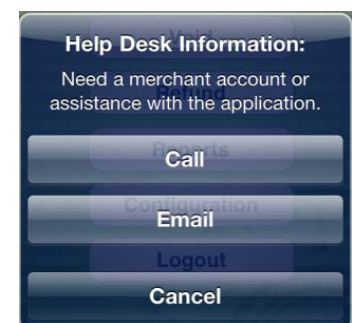
1. Select the CellSwipe application and enter the username and password.
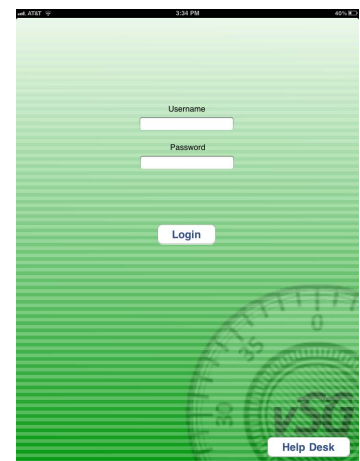
If the Login Failed User account is Disabled screen pops up the account is disabled. Contact Customer Support to reactivate the account.
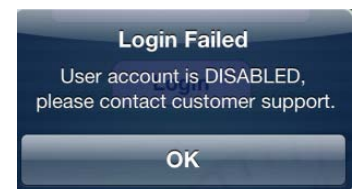
The Help Desk option allow you to connect with CellSwipes help desk by phone call or by e-mail.
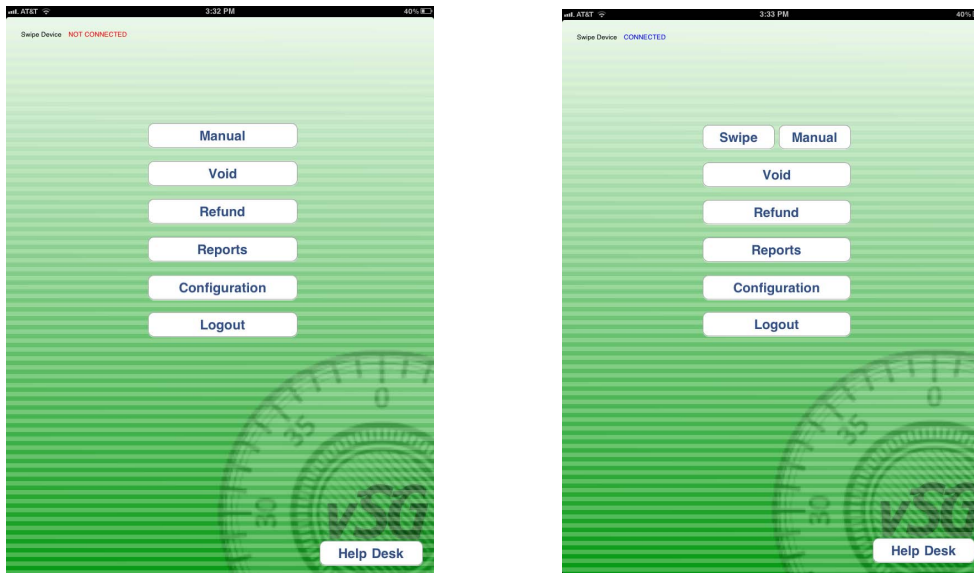
Connecting Your Swipe Device:

Attach the CellSwipe device onto the bottom of the iPad.

The connection status will be indicated at the top right of the main menu screen in blue or red.

When the swipe device is not connected the Swipe transaction option is not available.

Options on the Main Menu can be restricted based on user access. If a user does not have access the Invalid Permission screen will pop up.

Admin user – Access to Swipe, Manual, Void, Refund, Reports, and Configuration

Manager user - Access to Swipe, Manual, Void, Reports, and Configuration

User - Access to Swipe, Manual, Reports, and Configuration
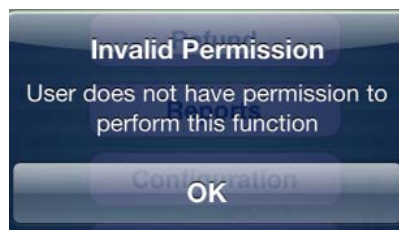
Processing a **Swipe** Sales Transaction

To process a sales transaction using the swipe device, perform the following steps:

1. Make sure the swipe device is attached to the iPad

2. Select **Swipe** from the main menu

3. Swipe the card through the swipe device

4. The card information will auto fill

5. Enter the transaction amount

6. Select **Process**

7. If enabled, select **Capture Signature**, Allow customer to digitally sign receipt and select **Submit**

8. **E-mail** receipt or click **Next** to return to the main menu

Processing a **Manual** Sales Transaction

To process a manual sales transaction, perform the following steps:

1. Select **Manual** from the main menu

2. Enter the credit card number

3. Enter the Expiration Month and Year

4. Enter the CVV number from the back of the card

5. Enter the transaction amount

6. Enter the card holder Street # and Zip (only if AVS is enabled)

7. Click **Process**

8. **E-mail** receipt or click **Next** to return to the main menu

Processing a **Void** Transaction

Void cancels a pending transaction and removes the transaction from the day's totals. You can only void transactions that were processed during the current business day.
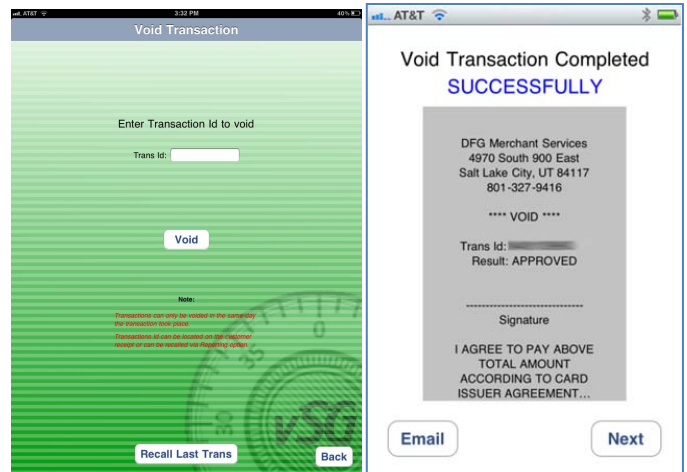
Voids can be done from the CellSwipe application or the Online Reporting site (vSecureReports).

To void a transaction perform the following steps:

1. Select **Void** from the main menu

2. Enter the Transaction ID. This may be found on the receipt

   OR

3. Click **Recall Last Trans**

4. Click **Void**

5. **Email** Voided receipt or click **Next** to return to the main menu

# Processing a **Refund** (Credit) Transaction

Refund returns the original dollar amount to a customer's credit card account, based on a previously settled transaction, usually the day after taking the original transaction.

It is not necessary to have the customer's credit card number because Refund uses the credit card number from the original transaction.

You can issue a refund from the **CellSwipe application** or the **Online Reporting** site (vSecureReports).

To Refund a transactions action, perform the following steps:

1. Select **Refund** from the main menu
2. Enter the Transaction ID. This may be found on the receipt
3. Enter the Reference #. This may be found on the receipt
4. Enter the amount of the original transaction. This may be found on the receipt
5. Click **Refund**
6. Enter Password
7. Click **Next**
8. **Email** the Refunded receipt or click **Next** to return to the Main Menu
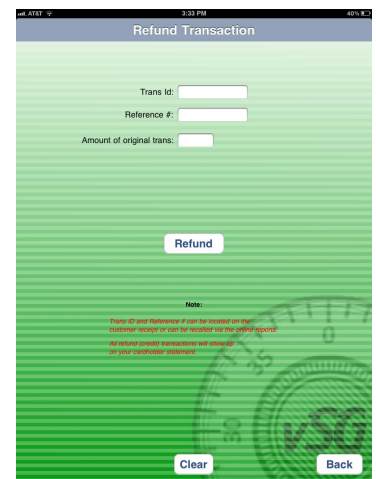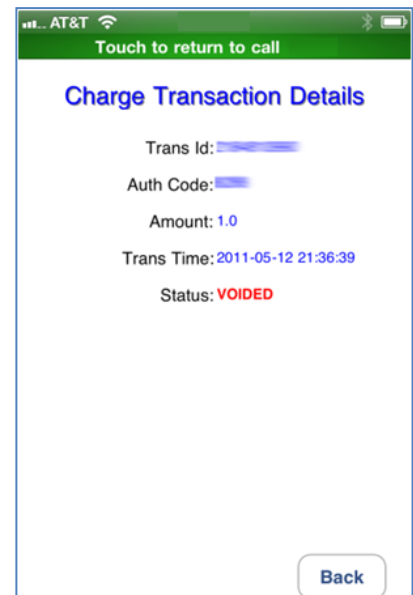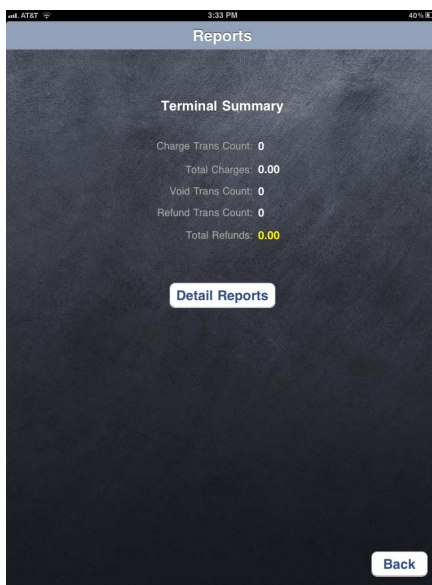
Reporting

Transactions processed on the iPad can be viewed under Reporting from the Main Menu.

To Refund a transactions action, perform the following steps:

1. Select **Reporting** from the main menu
2. The Reports screen shows all the transaction completed on the iPad.
3. Click on **Detail Reports**
4. Click on the transaction to view more details or to re-email the receipt

Configuration Menu

The Configuration menu allows the user to turn AVS (Address Verification System) on or off. Reset the password and to delete transaction history and user account information for the iPad.

AVS

To turn off AVS (Address Verification System), perform the following steps:

1. Select **Configuration** from the main menu

2. Slide the bar next to AVS input ENABLED from **On** to **Off**

Demo

Demo mode is not available after the initial log in.

Signature Capture

Enables the application to capture a customer signature for swiped transactions.

BCC (Blind Carbon Copy) Email

This feature allows the user to configure an email address to be blind copied on every transaction receipt that is sent to a customer.

Reset Password

To reset the password, perform the following steps:

1. Select **Configuration** from the main menu

2. Click the **Reset Password** button

Delete Transaction history from]DUX

To delete the transaction history from the iPad, perform the following steps:

*Note: Deleting transaction history from does not affect settlement of transactions or reporting from vSecureReports.

1. Select **Configuration** from the main menu

2. Click **Delete transaction history**

Delete user account information from]DUX

To delete the user account information the iPad, perform the following steps:

*Note: Deleting user account information from the ipad will require the user to reenter their password at next login.

1. Select **Configuration** from the main menu

2. Click the **Delete user account**

ConfigurY 7i ghca ˙:]Y`Xg
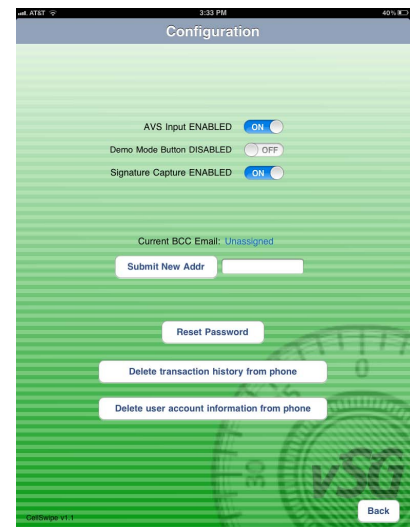
The Config option allows the user to create custom tags that can be associated with transaction processed by the iPad and vTerminal.

To change the C**ustom Fields** please log in to the vTerminal and perform the following steps:

1. Roll the mouse over the **Config** Menu Option
2. Select the **Update Custom Fields** Menu Option.

Home	Transaction Type	Reporting	Config	Log-Out	
			Updated Custom Fields		
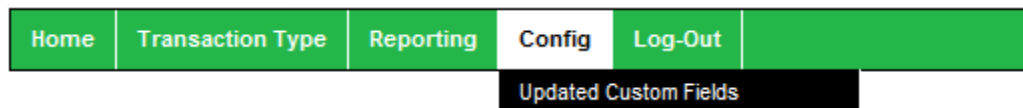
3. Enter a value for the Custom Fields (For example: invoice#:, Product #:, Product Type:)

	Current Value	**New Value**
Custom Field #1	MID:	
Custom Field #2	Item Sold	

(For example: invoice #:, Product #:, Product Type:)

Process

4. Click **Process** to submit the new custom fields

Note: if the Custom Field is left blank then the field will be omitted from the Sale transaction screen.